

Market Analysis Summary:

Shoreline Education, Outreach and Stewardship Survey, April 2011

Results summarized by Ecology Outreach Strategy Team, released September 2011

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Background:

The Department of Ecology is developing a comprehensive strategy for statewide shorelines education, outreach and stewardship. Ecology's goal is to develop collaborative partnerships and to raise public awareness and increase citizen involvement in the protection and restoration of Washington's shorelines.

An initial step in this process was to carry out a Market Analysis to compile an inventory of existing shoreline education and outreach programs in Washington State. The survey has identified topics that are being well-addressed, topics that need more attention, locations, approaches, and target audiences.

This report is intended to be a brief summary and not an in-depth analysis. The Strategy Team will use these results - as well as data collected from focus groups, other organizations, and input from scientists - to inform the development of the strategy.

Methodology:

A comprehensive list of potential partners and providers was compiled by the Strategy Team. A link to an online survey was sent to these partners with a request to forward the survey to other program coordinators in their organization. In a few instances, one person filled out the survey for the whole agency. A total of 260 people started the survey, and 189 completed the whole survey (73%).

Data Snapshot and Brief Analysis:

Most survey respondents represented local governments and non-profit agencies, primarily from Western Washington. Community education, information distribution, and field-based education were the top three forms of education programs and services.

The top three topics that respondents perceive as needing more attention are:

1. Stewardship actions that people can take
2. Low impact development
3. Climate change/sea level rise

Interestingly, some of the topics that were rated as "Need More Attention" also ranked high in the "Well" to "Thoroughly Addressed" category (e.g., "stewardship actions that people can take"). These results suggest that even though some institutions are doing a good job of addressing certain topics, there is still a perception that a lot more attention needs to be given to some of these same issues. When comparing "Westside" Washington responses with "Eastside" Washington responses, there was not a significant difference. There was a good correlation between those topics that ranked lowest on "needs attention" with those ranked lowest on "those thoroughly addressed/well addressed", which affirms they don't need more attention.

Regarding program delivery techniques, partners rely more on printed materials vs. web-based or social media techniques. When programs are marketed, there is a much heavier reliance on the web than on printed materials. When distributing educational materials, the use of web-based and printed materials is nearly equal.

Respondents ranked “general public” as the most common target audience, but it isn’t clear if some of the more targeted audiences also fall under this category or if an organization’s particular target audience was not listed. In retrospect, it might have been more instructive to leave off this category and focus only on specific target audiences.

The survey generated a much more comprehensive list of organizations than the strategy team had when it first started. Many of these organizations are interested in helping to develop the shoreline education, outreach, and stewardship document, which affirms that a strategy would be a useful tool.

Data Summary:

The following lists of data are prioritized from high to low and show the percentage of respondents who selected those particular answers. The top ranked items have been bolded for easier viewing. Percentages have been rounded up or down to the nearest whole number.

Organizations

- 1. Local Government – 36%**
- 2. Local Non-Profit Organization – 23%**
3. State Government – 12%
4. Educational Institution (university, community college, etc.) – 12%
5. For-profit Business – 9%
6. Federal Government – 7%
7. Nature Center/Environmental Education Center – 6%
8. Tribal Government – 3%
9. National Non-profit Organization – 3%
10. Museum/Zoo/Aquarium – 3%
11. Professional Association – 0%

Service range

- 1. Westside – 69%**
2. Eastside – 10%
3. Both – 22%

Counties served

- 1. King County – 45%**
- 2. Snohomish County – 35%**
- 3. Kitsap County – 33%**
- 4. Pierce County – 32%**
- 5. Thurston County – 30%**
6. Island County – 29%
7. Jefferson County – 28%
8. Skagit County - 27%
9. Clallam County – 26%

10. Whatcom County – 25%
11. San Juan County – 22%
12. Pacific County – 16%
13. Spokane County – 15%
14. Yakima County – 15%
15. *Remaining counties are less than 15%*

Types of shoreline education/stewardship programs and services

1. **Community education – 70%**
2. **Information (newsletters, printed materials, website, etc.) – 66%**
3. **Field-based (travel to field sites) – 50%**
4. Shoreline restoration – 42%
5. Technical assistance – 42%
6. Shoreline property owner education – 40%
7. School programs – elementary – 39%
8. School programs – middle/junior high – 34%
9. Shoreline clean-up – 31%
10. School programs – high school 29%
11. Volunteer training – 29%
12. Professional training – 20%
13. Financial assistance – 15%
14. Higher education – 10%

Primary Target Audiences

1. **General public – 73%**
2. **Shoreline property owners (residential, business) – 56%**
3. **Local government officials – 50%**
4. Shoreline users – 38%
5. Elementary students – 36%
6. Business owners who do business along a shoreline (landscapers, septic pumpers, realtors, contractors, etc) – 34%
7. Middle school/ Junior high students – 32%
8. High school students – 29%
9. Homeowners associations – 28%
10. State government officials – 24%
11. Tribal officials – 23%
12. Civic organizations – 23%
13. College students – 21%
14. Environmental consultants – 21%
15. Federal government officials – 19%
16. Legislators – 15%
17. Property rights groups – 14%

Topics that need more attention

1. **Stewardship actions that people can take – 53%**
2. **Low impact development – 50%**
3. **Climate change/sea level rise – 48%**
4. Conservation /preservation (easements, incentives, etc.) – 46%
5. Invasive species – 45%

6. Water quality – 43%
7. Shoreline stabilization (bulkheading, armoring, etc.) – 43%
8. Erosion and sedimentation – 41%
9. Native vegetation – 41%
10. Water pollution – 41%
11. Vegetation management – 41%
12. New construction – 39%
13. Rivers and watersheds – 39%
14. Wildlife – 38%
15. Restoration – 36%
16. Wetlands/marshes – 36%
17. On-site runoff – 34%
18. Yard care (reducing chemicals, view management, etc.) – 32%
19. Agricultural practices – 30%
20. Car maintenance (fixing leaks, proper washing techniques, etc.) – 30%
21. Septic systems – 28%
22. Coastal hazards – 26%
23. Water structures (boatlifts, docks and piers, etc.) – 24%
24. Livestock management (manure, access, etc.) – 23%
25. Litter and dumping (yard waste, large appliances, etc.) – 21%
26. Pets (behavior, waste management, etc.) – 21%
27. Recreational boating – 21%
28. Water catchment systems – 21%
29. Derelict fishing gear – 19%
30. Well drilling – salt water intrusion – 10%

Topics perceived as “Well” to “Thoroughly” addressed

These topics were ranked by at least half of the respondents as being “well” to “thoroughly” addressed. See “Topics that need more attention” (above) for a complete list of options provided to respondents.

- 1. Stewardship actions that people can take - 63%**
- 2. Water Quality – 63%**
- 3. Water Pollution – 61%**
4. Rivers and Watersheds – 60%
5. Restoration – 60%
6. Native Vegetation – 60%
7. Wetlands/Marshes – 53%
8. Wildlife – 51%
9. Erosion and Sedimentation – 50%

Program delivery approaches

- 1. Printed materials – 70%**
- 2. Event booths, tables, or displays – 62%**
- 3. Workshops – 56%**
- 4. Field trips – 54%**
- 5. Web-based – 51%**
6. Hands-on restoration – 49%
7. Technical assistance – 49%
8. Lectures – 46%
9. Monitoring – 44%

10. Tours – 36%
11. Print news (newspaper columns, etc.) – 35%
12. Advocacy – 33%
13. Social media – 30%
14. Service learning – 26%
15. Distance learning – 6%

Marketing techniques

1. **Website – 85%**
2. **Community events – 67%**
3. **Directly to past participants – 61%**
4. **Local newspaper – 57%**
5. **Organizational newsletter – 55%**
6. **Posters/Fliers – 55%**
7. Participant referrals – 48%
8. Listserv(s) – 45%
9. Social media – 37%
10. Local radio – 24%
11. Local television – 9%

Educational materials/tools

1. **Brochures – 67%**
2. **Website – 63%**
3. **Fact sheets – 58%**
4. Displays – 48%
5. Demonstration projects – 43%
6. Curriculum and/or lesson plans – 37%
7. Newspaper articles – 36%
8. Exhibits – 29%
9. Guidebooks – 28%
10. Social media – 24%
11. Video – 22%
12. Interactive displays – 19%
13. Models – 16%
14. Blogs – 13%