

Community perceptions of the sustainability of the fishing industry in Australia

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executive summary

research context

One of the significant challenges facing the Australian fishing industry is in achieving long term sustainability for the industry. With ongoing efforts and investment being made by all sectors of the industry and Government, ensuring that the broader Australian community is both informed about the industry's progress (in regards achieving sustainability) and engaged with these efforts and at the same time engaged in the direction for the industry is an important 'marker' for the industry.

The objective of this research was then to gauge community perceptions about the achievements and ongoing investment the industry is making into achieving long term sustainability. An online survey of a nationally representative sample of n=1,025 randomly selected adult Australians (aged 18 years and over) was conducted to provide robust measures of the current community perceptions.

The survey was conducted in early April 2011 with results from the survey weighted using the ABS population estimates to ensure the final results appropriately reflected the current size and structure of the Australian population. The key results from this research are now presented.

does the Australian community believe the industry is sustainable?

For the purposes of this research sustainability was defined as *"the industry having the necessary practices and policies in place that ensure the future of fish species and the marine environment while at the same time providing sufficient supply of fish for commercial and recreational fishing needs"*.

The results from the 2011 research indicate that the Australian community remains divided with:

- o just over one in three (37%) believing the industry was sustainable;
- o just over one in four (26%) believing the industry was not sustainable; while
- o the remaining one in three (37%) just not sure if the industry was sustainable or not.

Among those who were uncertain or dismissive that the industry was currently sustainable, there is a clear sense of pessimism with 52% not confident the industry will become sustainable.

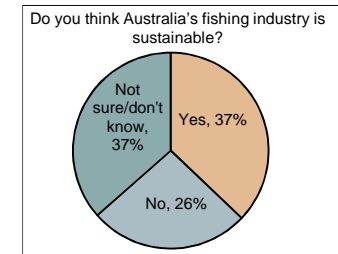
Perhaps not surprisingly, people who fish regularly and eat seafood regularly were more likely to believe the industry was sustainable. However the level of support even amongst these arguably advocate groups suggests further work is required to strengthen perception around sustainability.

Clearly then there is a substantial challenge to better inform, educate and influence community perceptions about the long term sustainability of the fishing industry.

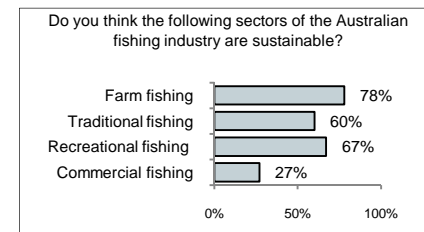
The results were also reported across the different sectors of the industry. As can be seen from the figures opposite:

- o There is a stronger level of confidence across the community about the sustainability of aquaculture (78%) and recreational fishing (67%); whereas
- o Perceptions are decidedly weaker in regards commercial fishing (just 27% believing it's sustainable).
- o Of note is that these community perceptions have appeared to have remained static for some time (comparison made with a 2003 study by FRDC). This result suggests that efforts during this period have been largely unsuccessful at driving changes in community perceptions. A separate and more targeted effort may be required if substantive change is to be achieved.

These results suggest that community perceptions around the sustainability of commercial fishing are a key driver of their perceptions of the industry as a whole. Focus on improving this specific result may well help drive improvements in the 'whole of industry' result.



Base: All respondents; n=1025



Base: All respondents; n=1025

Fishing Sectors	2011 (% agree)	2003 (% agree)
Farm fishing	78%	77%
Traditional fishing	60%	64%
Recreational fishing	67%	56%
Commercial fishing	27%	27%

executive summary

is the community aware that industry and Government working towards sustainability?

The results in this area are disappointing and reflect a low level of visibility and awareness of the efforts being made in this area. The results were consistent with the earlier findings with just 16% reporting they were aware of the work the industry and Government is doing to improve the sustainability of the industry.

Right now these results suggest the specific efforts and investments have not achieved any significant level of public awareness. On a more positive note the majority of adult Australians (53%) assume that both industry and Government are working to make improvements in this area.

The challenge going forward then is to ensure major investments and achievements by both industry and Government receive sufficient community visibility – this should then have a positive down stream effect on the key indicators of sustainability for the industry.

by comparison

More than one in two adult Australians (54%) believe the Australian fishing industry is ahead of other countries in regards sustainability (18% reporting Australia was well ahead and 36% slightly ahead). Given the high level of uncertainty about exactly what the Government and industry are doing here in Australia this result should be treated with some caution.

so who is responsible for the sustainability of Australian fisheries?

The results from this question appear opposite. What is apparent from this result is that most adult Australians acknowledge that achieving sustainability is a shared responsibility.

The results further suggest that 'industry' as a collective (everyone who fishes) is the predominant 'custodian' for sustainability, although the results clearly indicate that Australians consider that Government and indeed the broader community has a role to play in these efforts. Clearly however the industry will need to be a leading advocate and driver of change and improvements to the sustainability of the industry.

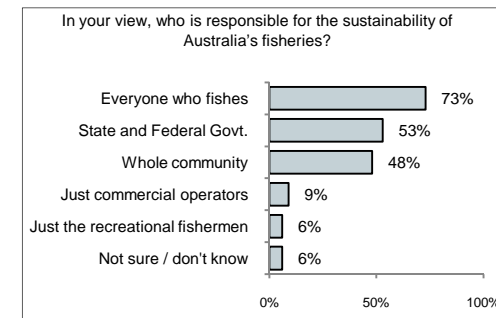
where is the balance between environment and supply pressures?

The results from this study suggest the majority of Australians (64%) believe the industry and Government should achieve an equal balance between supply of fresh fish for consumption and the delicate environmental needs of the marine environment.

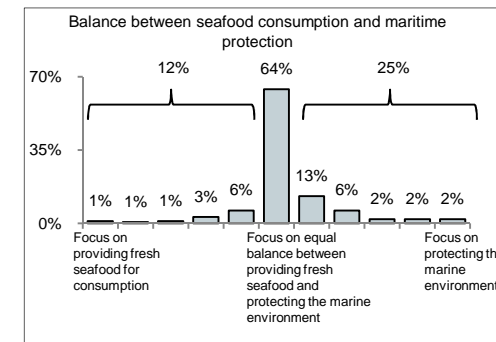
While this provides some licence for both protecting marine areas and at the same time ensuring recreational and commercial fishing is catered for there is likely to be a delicate balance – in some respects a discussion of one cannot be held without reference to the other.

Moving forward FRDC will need to remain cognisant of the need to continually balance environmental and supply issues.

The detailed results from the research now follow.



Base: All respondents; n=1025



Base: All respondents; n=1025

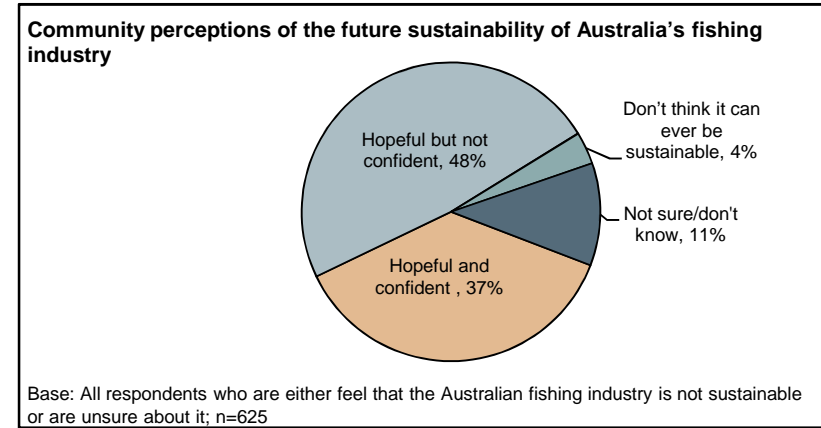
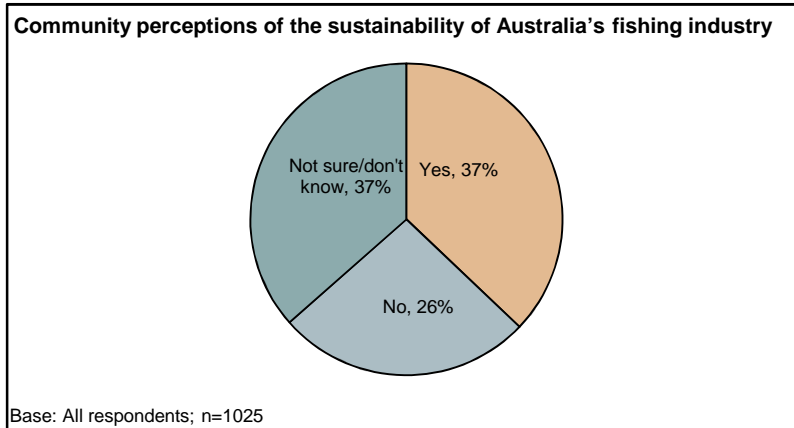
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community perceptions of the sustainability of
Australia's fishing industry

community perceptions of the sustainability of Australia's fishing industry



Segmentation tables

	Frequent eaters	Regular eaters	Occasional / non eaters
n	611	310	100
Yes	41%	36%	24%
No	25%	25%	33%
Not sure/don't know	34%	38%	43%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	194	255	576
Yes	57%	41%	29%
No	30%	26%	25%
Not sure/don't know	13%	33%	46%

Note: The definitions of frequent, regular, occasional / non fishers and eaters is presented in the research design section of the report.

	Frequent eaters	Regular eaters	Occasional / non eaters
n	351	194	77
Hopeful and confident	41%	33%	33%
Hopeful but not confident	48%	51%	42%
Don't think it can ever be sustainable	3%	4%	6%
Not sure/don't know	8%	12%	19%

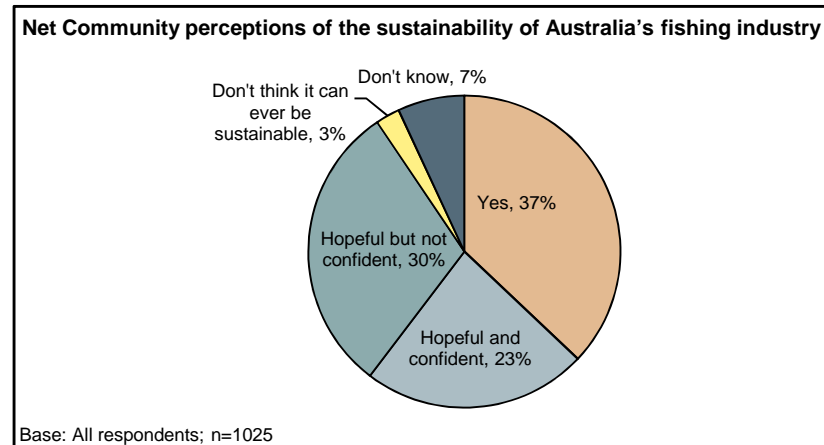
	Frequent fishers	Regular fishers	Occasional / non fishers
n	87	148	390
Hopeful and confident	22%	44%	37%
Hopeful but not confident	68%	49%	44%
Don't think it can ever be sustainable	4%	5%	3%
Not sure/don't know	6%	3%	16%

What we asked:

Do you think Australia's fishing industry is **sustainable**? That is, does the industry have the necessary practices and policies in place that ensure the future of fish species and the marine environment while at the same time providing sufficient supply of fish for commercial and recreational fishing needs?

Do you think Australia's fishing industry can be sustainable?

community perceptions of the sustainability of Australia's fishing industry



Segmentation tables

	Frequent eaters	Regular eaters	Occasional / non eaters
n	611	310	100
Is sustainable	41%	36%	24%
Hopeful and confident	24%	21%	25%
Hopeful but not confident	28%	33%	32%
Don't think it can ever be sustainable	2%	2%	5%
Not sure/don't know	5%	8%	14%

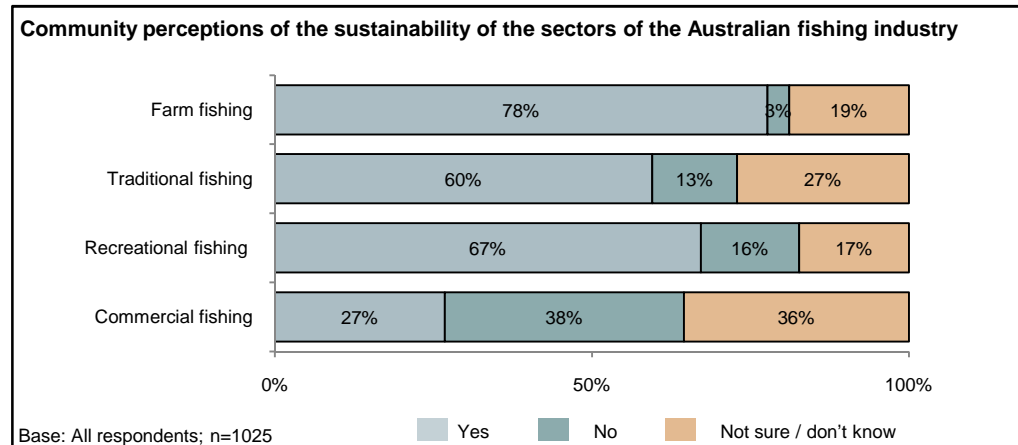
	Frequent fishers	Regular fishers	Occasional / non fishers
n	194	255	576
Is sustainable	57%	41%	29%
Hopeful and confident	9%	26%	26%
Hopeful but not confident	29%	29%	31%
Don't think it can ever be sustainable	1%	3%	2%
Not sure/don't know	2%	1%	12%

What we asked:

Do you think Australia's fishing industry is **sustainable**? That is, does the industry have the necessary practices and policies in place that ensure the future of fish species and the marine environment while at the same time providing sufficient supply of fish for commercial and recreational fishing needs?

Do you think Australia's fishing industry can be sustainable?

community perceptions of the sustainability of Australia's fishing industry



Segmentation tables

% agreeing with the sustainability of the sectors

	Frequent eaters	Regular eaters	Occasional / non eaters
n	611	310	100
Farm fishing	81%	76%	68%
Traditional fishing	60%	57%	62%
Recreational fishing	69%	68%	58%
Commercial fishing	28%	29%	15%

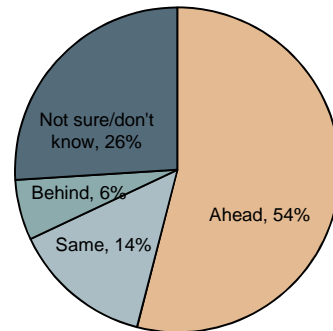
	Frequent fishers	Regular fishers	Occasional / non fishers
n	194	255	576
Farm fishing	79%	84%	74%
Traditional fishing	54%	64%	59%
Recreational fishing	66%	78%	63%
Commercial fishing	32%	30%	24%

What we asked:

Do you think the following sectors of the Australian fishing industry are sustainable?

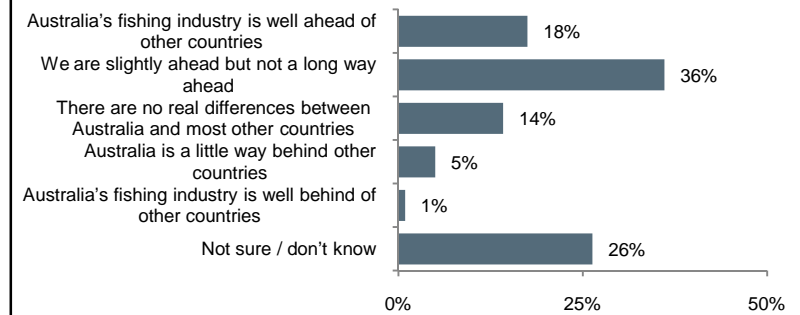
community perceptions of the sustainability of Australia's fishing industry

Community perceptions of Australia's fishing industry's practices around sustainability'



Base: All respondents; n=1025

Comparison of practices followed by Australian fishing industry to those overseas



Base: All respondents; n=1025

Segmentation tables

	Frequent eaters	Regular eaters	Occasional / non eaters
n	611	310	100
Australia's fishing industry is well ahead of other countries	20%	15%	12%
We are slightly ahead but not a long way ahead	40%	35%	23%
There are no real differences between Australia and most other countries	14%	14%	17%
Australia is a little way behind other countries	5%	5%	6%
Australia's fishing industry is well behind of other countries	1%	1%	0%
Not sure / don't know	20%	30%	43%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	194	255	576
Australia's fishing industry is well ahead of other countries	27%	17%	14%
We are slightly ahead but not a long way ahead	44%	45%	29%
There are no real differences between Australia and most other countries	13%	13%	15%
Australia is a little way behind other countries	6%	3%	6%
Australia's fishing industry is well behind of other countries	1%	1%	1%
Not sure / don't know	9%	21%	35%

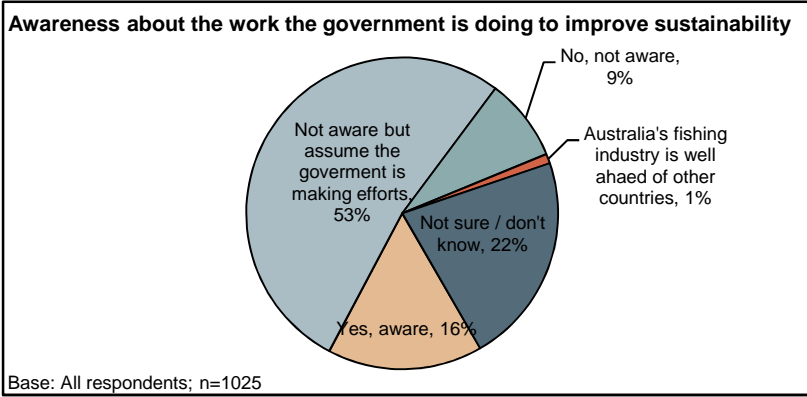
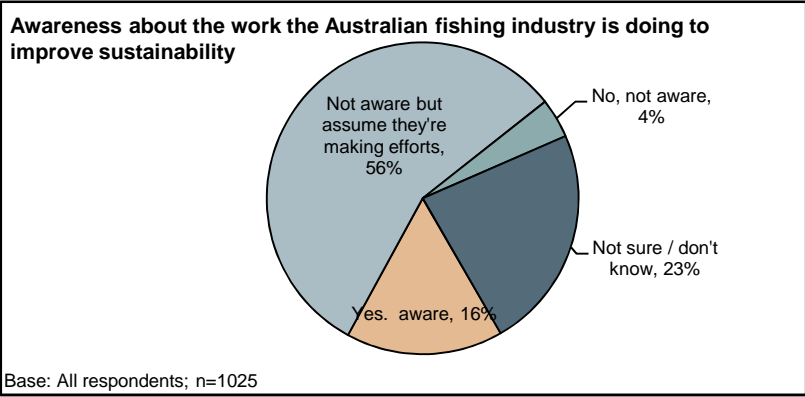
What we asked:

Do you think Australia's fishing industry and their practices around sustainability are better, worse or the same to those used in other countries?



awareness of the work being done to make Australia's
fishing industry sustainable

awareness of the work being done to make Australia's fishing industry sustainable



Segmentation tables

	Frequent eaters	Regular eaters	Occasional / Non eaters
n	611	310	100
Yes, aware	20%	15%	3%
No, not aware but assume they are making efforts	59%	56%	49%
Not, not aware	4%	5%	2%
Not sure / don't know	17%	24%	46%

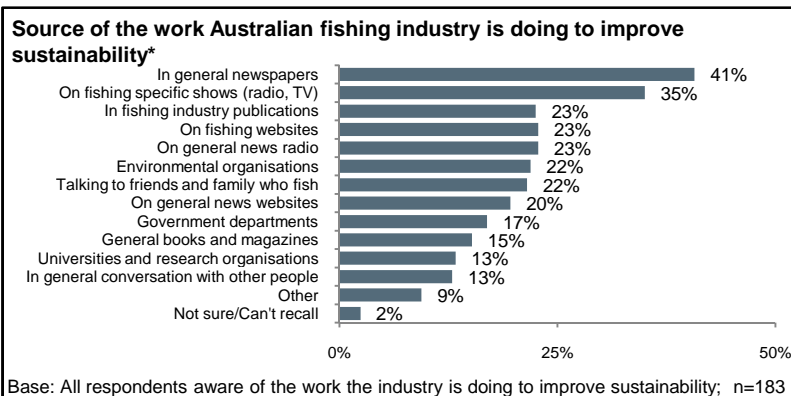
	Frequent eaters	Regular eaters	Occasional / non eaters
n	611	310	100
Yes, aware	20%	13%	7%
No, not aware but assume they are making efforts	54%	55%	41%
Not, not aware	8%	9%	9%
Australia's fishing industry is ahead of other countries	0%	2%	0%
Not sure / don't know	17%	21%	42%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	194	255	576
Yes, aware	30%	19%	10%
No, not aware but assume they are making efforts	52%	59%	57%
Not, not aware	5%	6%	3%
Not sure / don't know	14%	15%	30%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	194	255	576
Yes, aware	27%	19%	11%
No, not aware but assume they are making efforts	51%	57%	51%
Not, not aware	12%	10%	7%
Australia's fishing industry is ahead of other countries	1%	2%	0%
Not sure / don't know	9%	12%	31%

What we asked:
 Do you know if the fishing industry is doing work to improve its level of sustainability?
 Do you know if Government is doing work to improve the sustainability of fisheries?

awareness of the work being done to make Australia's fishing industry sustainable



Segmentation tables

	Frequent eaters	Regular eaters	Occasional / non eaters
n	126	52	5
In general newspapers	35%	58%	9%
On fishing specific shows (radio, TV)	38%	28%	36%
On fishing websites	24%	19%	39%
In fishing industry publications	25%	15%	27%
On general news radio	20%	29%	28%
Environmental organisations	26%	12%	21%
Talking to friends and family who fish	18%	32%	12%
On general news websites	20%	17%	45%
Government departments	22%	7%	0%
General books and magazines	16%	11%	33%
Universities and research org.	17%	6%	0%
Conversation with other people	15%	9%	9%
Other	8%	13%	0%
Can't recall	3%	0%	0%

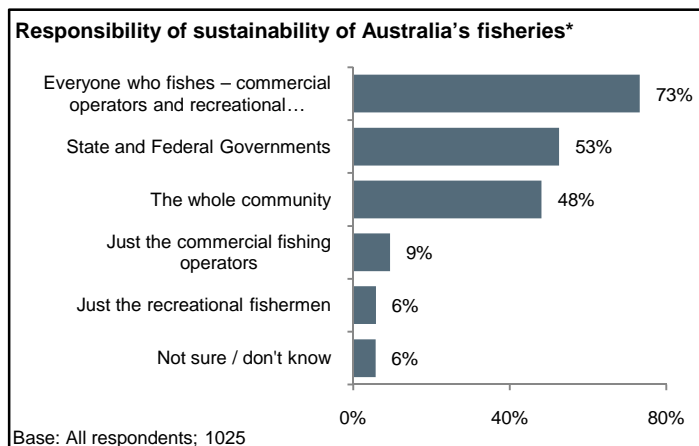
	Frequent eaters	Regular eaters	Occasional / non eaters
n	56	52	75
In general newspapers	28%	58%	37%
On fishing specific shows (radio, TV)	35%	33%	37%
On fishing websites	41%	21%	8%
In fishing industry publications	48%	15%	5%
On general news radio	13%	25%	30%
Environmental organisations	38%	18%	10%
Talking to friends and family who fish	15%	29%	21%
On general news websites	15%	20%	24%
Government departments	26%	20%	6%
General books and magazines	21%	19%	6%
Universities and research org.	27%	4%	8%
Conversation with other people	10%	15%	14%
Other	10%	5%	12%
Can't recall	0%	0%	7%

* Multiple response question. Percentages may not add up to 100.

What we asked:

And where did you hear about the work the fishing industry is doing to improve its level of sustainability?

awareness of the work being done to make Australia's fishing industry sustainable



Segmentation tables

	Frequent eaters	Regular eaters	Occasional / non eaters
n	611	310	100
Everyone who fishes – commercial and recreational	76%	69%	77%
State and Federal Governments	52%	53%	59%
The whole community	48%	46%	52%
Just the commercial fishing operators	9%	10%	8%
Just the recreational fishermen	7%	6%	1%
Not sure / don't know	5%	7%	6%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	194	255	576
Everyone who fishes – commercial and recreational	73%	79%	71%
State and Federal Governments	41%	58%	54%
The whole community	40%	50%	50%
Just the commercial fishing operators	16%	8%	8%
Just the recreational fishermen	14%	4%	4%
Not sure / don't know	6%	3%	7%

* Multiple response question. Percentages may not add up to 100.

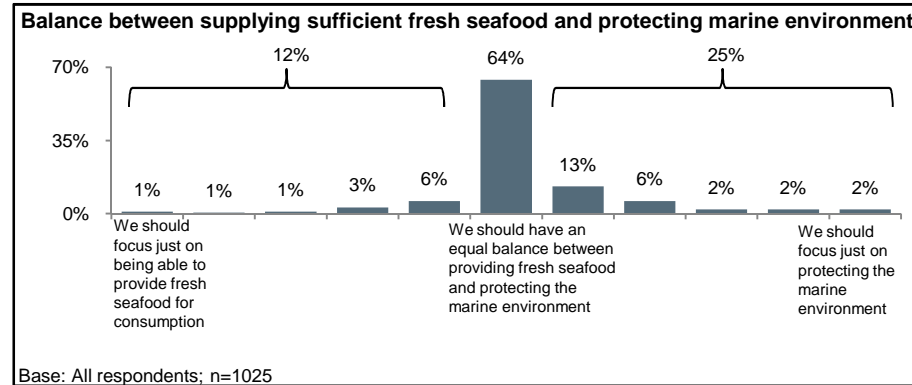
What we asked:

In your view, who is responsible for the sustainability of Australia's fisheries?



balance between seafood for consumption & maritime protection

balance between seafood for consumption & maritime protection



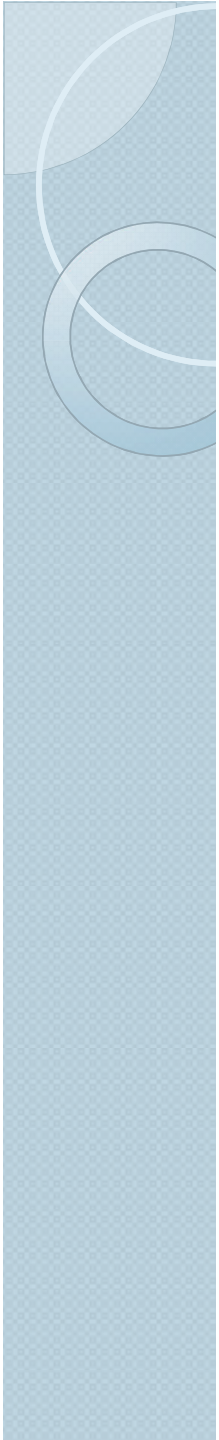
Segmentation tables

	Frequent eaters	Regular eaters	Occasional / non eaters
n	611	310	100
We should focus just on being able to provide fresh seafood for consumption	1%	1%	0%
	1%	0%	1%
	2%	1%	1%
	4%	3%	2%
	7%	6%	4%
We should have an equal balance between providing fresh seafood and protecting the marine environment	63%	67%	60%
	13%	12%	20%
	8%	5%	1%
	2%	2%	3%
	1%	1%	7%
We should focus just on protecting the marine environment	1%	2%	3%

	Frequent eaters	Regular eaters	Occasional / non eaters
n	194	255	576
We should focus just on being able to provide fresh seafood for consumption	2%	1%	1%
	2%	0%	0%
	3%	1%	1%
	5%	3%	3%
	8%	7%	5%
We should have an equal balance between providing fresh seafood and protecting the marine environment	59%	64%	65%
	10%	13%	14%
	7%	7%	5%
	1%	2%	2%
	2%	1%	2%
We should focus just on protecting the marine environment	2%	1%	2%

What we asked:

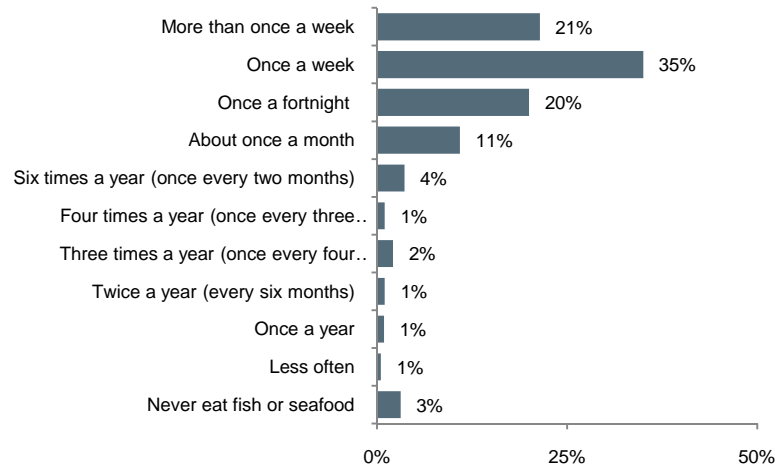
Most Australians acknowledge that its important to have a fishing industry that can supply sufficient fresh seafood so that everyone can buy locally caught seafood for consumption while at the same time having policies and practices that protect the marine environment. In your opinion how would you describe where the balance between these two, at times competing priorities, should be? Please select a position on the scale that best describes your opinion.



about the respondents

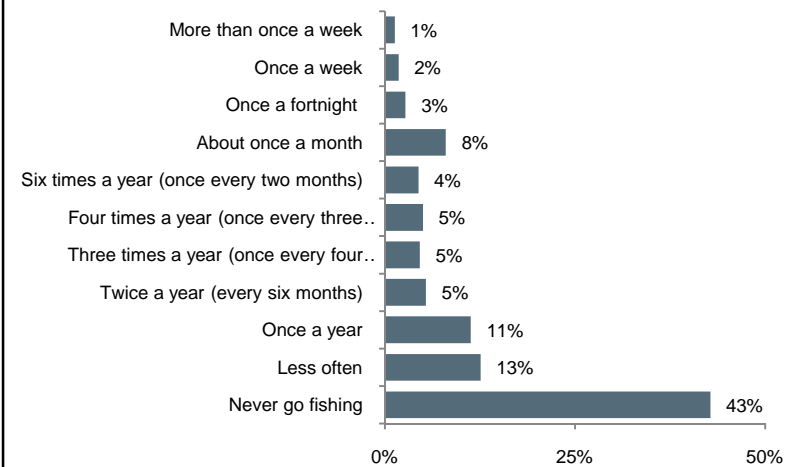
about the respondents

Seafood for consumption



Base: All respondents (excluding 4 don't knows); n=1021

Frequency of going fishing



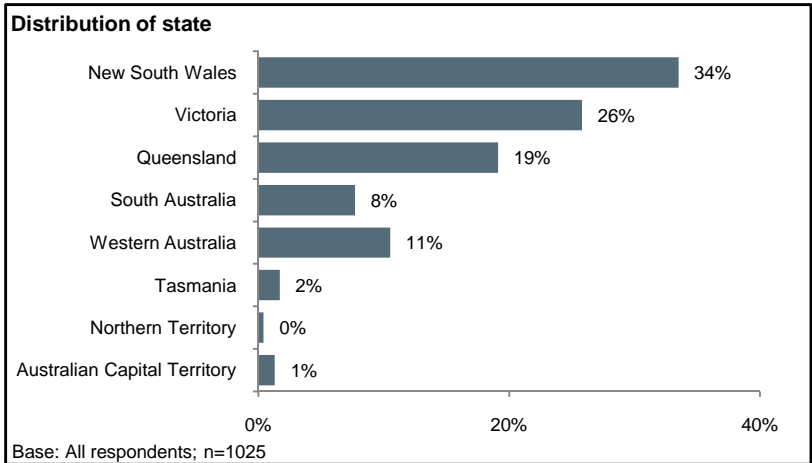
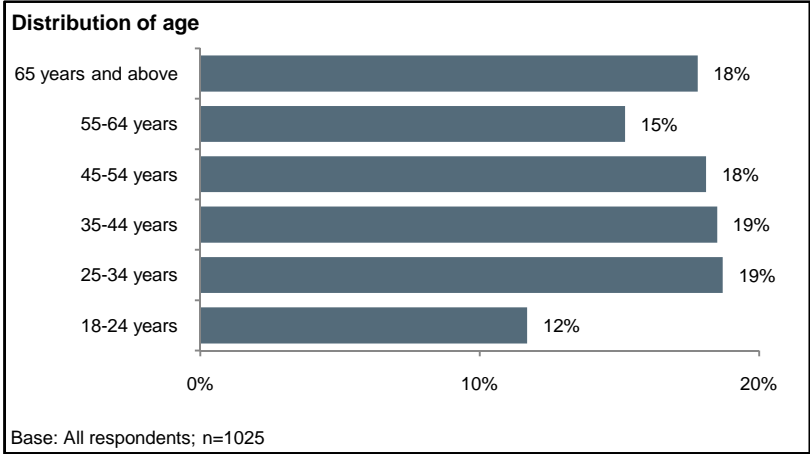
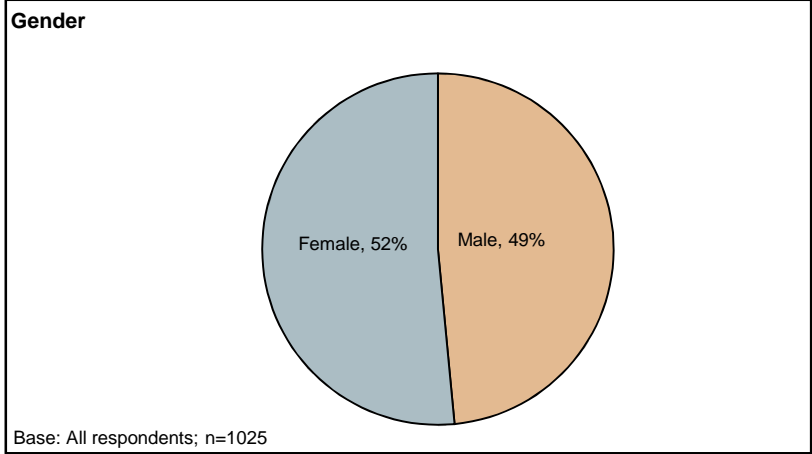
Base: All respondents; n=1025

What we asked:

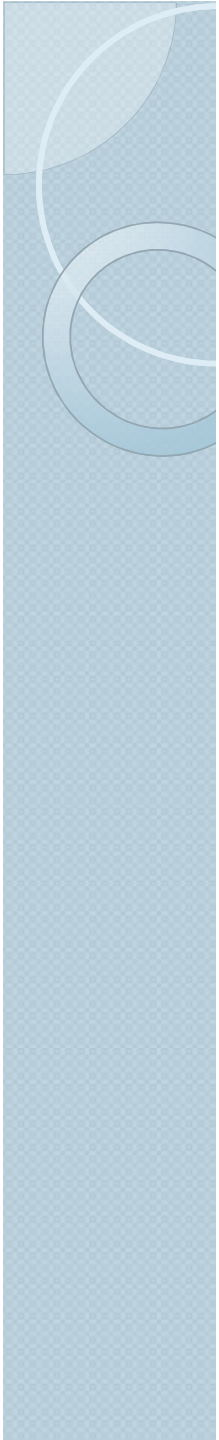
Over the past 12 months, how often would you say that you eat fish or seafood for a main meal?

And again over the past 12 months, how often have you gone fishing? Include any occasion you have gone recreational fishing – by yourself, with friends or family or with others.

demographics



What we asked:
Gender – please select
In which of the following age brackets do you fit into?
In which state do you live?



research design

research design

Methodology

An online survey was sent to an online panel above the age of 18 years. The sample was based on national representative numbers and was drawn randomly. There were no quotas set on age, gender or location.

Sample

In total n = 1025 surveys were completed by participants.

Questionnaire

Participants were asked to complete a 5 min online survey which covered a range of topics relating to their awareness and their thoughts about the Australian fishing Industry.

Weighting

The data was weighted using the estimated resident population 30th June 2010 (*Source: Australian Bureau of Statistics*). The data was weighted on the following variables:

- o Age
- o Gender
- o Location

Timing

The online survey was launched on March 28, 2011 and remained open until April 7, 2011.

Definitions

Eaters

Frequent eaters is defined as those who eat fish or seafood at least once a week.

Regular eaters includes those who eat fish or seafood once a fortnight or once a month.

Occasional /non eaters includes those who eat fish or seafood less frequently or do not eat at all.

Fishers

Frequent fishers is defined as those who go fishing at least six times a year (after every 2 months).

Regular fishers includes those who go fishing either one, two, three or four times a year.

Occasional fishers includes those who go fishing less often and those who never go fishing.

questions asked...

- Over the past 12 months, how often would you say that you eat fish or seafood for a main meal?
- And again over the past 12 months, how often have you gone fishing? Include any occasion you have gone recreational fishing – by yourself, with friends or family or with others.
- Do you think Australia's fishing industry is **sustainable**? That is, does the industry have the necessary practices and policies in place that ensure the future of fish species and the marine environment while at the same time providing sufficient supply of fish for commercial and recreational fishing needs?
- Do you think Australia's fishing industry can be sustainable?
- Do you think the following sectors of the Australian fishing industry are sustainable?
- Do you think Australia's fishing industry and their practices around sustainability are better, worse or the same to those used in other countries?
- Do you know if the fishing industry is doing work to improve its level of sustainability?
- Do you know if Government is doing work to improve the sustainability of fisheries?
- And where did you hear about the work the fishing industry is doing to improve its level of sustainability?
- In your view, who is responsible for the sustainability of Australia's fisheries?
- Most Australians acknowledge that its important to have a fishing industry that can supply sufficient fresh seafood so that everyone can buy locally caught seafood for consumption while at the same time having policies and practices that protect the marine environment. In your opinion how would you describe where the balance between these two, at times competing priorities, should be? Please select a position on the scale that best describes your opinion.
- Gender – please select
- In which of the following age brackets do you fit into?
- In which state do you live?