

2011 Recreational Fishers Survey

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Acknowledgements

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Intuitive Solutions

Management Summary

research context

There are a large number of Australians who fish recreationally. With the Australian community being an important stakeholder for organisations like Fisheries Research and Development Corporation (FRDC), it is important to examine the level of engagement it has with the broader community and the level of interest and involvement the general public and importantly recreational fishers want with research and development.

The objective of this research was then to gauge perceptions, attitudes and behaviours of the recreational fishing community to research and development and more specifically their engagement if any with FRDC. Given the diversity of opinions likely among recreational fishers, it was agreed that focus should be directed towards the more serious recreational fishers, that is those who do so regularly. This was defined as people who fish at least six times a year, making in any assessment fishing a regular if not primary leisure activity for these people. An online survey of a nationally representative sample of n=304 randomly selected regular fishers (aged 18 years and over) was conducted to provide robust measures of the current perceptions of this important stakeholder audience.

The survey was conducted in September 2011 with results from this research presented in this short report. A brief summary of the key findings from the research now follows.

insights into the regular recreational fisher stakeholder audience

- The research results show that almost six in ten (57%) regular recreational fishers are positive about the future of the recreational fishing industry in Australia.
- While just 14% indicated they were negative about the future it was evident that concerns about over regulation of the industry, the depletion of fish stocks and perceptions of increasingly limited areas in which to fish are collectively driving the negative outlook of this small group.
- An overwhelming 79% of regular recreational fishers indicated through the survey that they are concerned about the public perceptions of the recreational fishing industry. Maintaining a strong public reputation for the industry is clearly of concern to the majority of regular recreational fishers.
- Their concerns are driven by an acute awareness that the general public is a key consumer group of fish, an interest in protecting and strengthening the reputation of the recreational fishing sector, concerns that the industry appropriately manages the perhaps inevitable bad behaviour of some recreational and commercial fishers, and the need to continue to promote the sustainability and environmental performance of the industry.

the connection regular recreational fishers have with research and development

- Somewhat surprisingly, more than three in four regular recreational fishers (78%) reported that they have some interest in information and stories relating to the latest research and development in fishing. Just under one in three (27%) reported they were extremely interested suggesting there is a clear appetite for information and stories on the industry.
- Perhaps not surprising however is that 41% are interested in stories that relate directly to recreational fishing. There is again a surprisingly strong interest (50%) in stories relating to issues beyond the recreational fishing sector. This again talks to the latent demand from this audience for information that is broadly industry based.
- Perhaps in contrast, only 6% of regular recreational fishers reported they were very familiar with research and development that has occurred in the industry in the last few years. Almost one in two (48%) reported having some level of familiarity but clearly not sufficient to reflect a close connection with R&D.
- When asked about their view of the most successful advancements fishers were most likely to mention the success achieved in managing fish stocks, the establishment of marine parks, the introduction of new technology, the management of public perceptions, improved sustainability and better controls over the commercial sector.
- And then when asked about the most significant challenges facing the industry in the next five years, these regular recreational fishers identified a number of areas including ensuring there is sufficient supply to meet growing demand for fish, over fishing, safety issues, conservation of species, over regulation, compliance with existing rules and regulations and continuing to increase controls over the commercial sector.

regular recreational fishers engagement with FRDC

There are some key results from the survey:

- 51% of regular fishers reported that they were aware of FRDC. This suggests at least some exposure to the name and organisation has occurred.
- When asked about the roles and responsibilities of FRDC, it was evident that just 6% were sufficiently aware of the organisation and its role to be able to correctly identify the responsibilities of the organisation. The result which is much lower than the overall awareness figure is not surprising. So while the name has some recognition very few regular recreational fishers understand what FRDC does.
- Across all regular recreational fishers there was strong agreement of the importance of having an organisation like FRDC;
 - Even among those not aware of FRDC, when the role was explained they reported an importance rating of 7.6 (out of a possible 10);
 - Among those aware of FRDC, their importance rating was higher at 8.3.
- Not surprisingly then the actual involvement of regular fishers with FRDC was low:
 - Just 11% of all regular fishers had visited the FRDC website;
 - Just 4% of regular fishers receive the FRDC FISH magazine; while
 - There is however clearly an audience for the FISH magazine when 28% of all regular recreational fishers indicated they would be extremely interested in accessing the magazine.
- Finally when asked about their satisfaction with the investments FRDC makes in R&D we note that:
 - Among those aware of FRDC, their satisfaction rating was 7.0 (out of a possible 10)

Given the very low levels of knowledge of FRDC, this result is of little concern at this point. Once knowledge builds it will become increasingly important to track fishers response to this metric.

so where to from this point

The results from this survey of regular recreational fishers has highlighted that:

- While there is some awareness of the FRDC name, there is little understanding of the role or responsibility the organisation has. Should FRDC consider this stakeholder audience to be of value in engaging, then some effort will be required to build and strengthen the clarity and brand knowledge. It is inevitable this will take some time and require an appropriate and supporting set of initiatives and investment.
- Regular recreational fishers are clearly engaged and involved in the industry as demonstrated by their concern about the public perceptions of their sector. Providing clear examples of how R&D funded through the FRDC programs can support the sector will likely go some way to creating a strong platform for future engagement.
- The absence of any clear positioning of FRDC in the minds of these fishers provides a useful baseline and platform for FRDC to establish a clear and distinctive positioning around R&D.
- The survey results point to a somewhat unexpected appetite for R&D related stories and information about the industry. This provides a valuable access point for FRDC to engage with this audience.
- The current FISH magazine may well provide a useful lever to create and build an engagement with regular recreational fishers. Carefully targeted, the magazine could be used to successfully position FRDC.

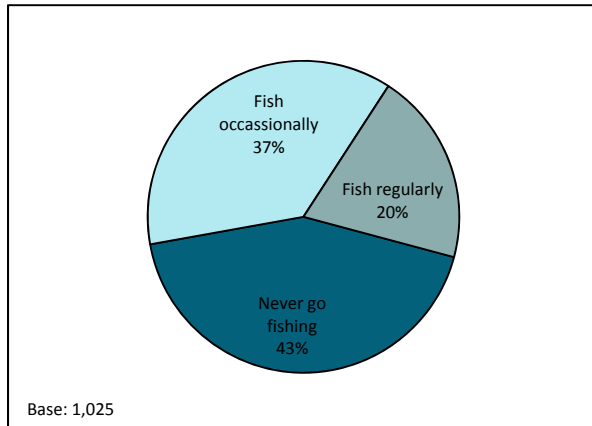
This completes a brief overview of some of the key results from the study. The more detailed results now follow.

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the recreational fisher

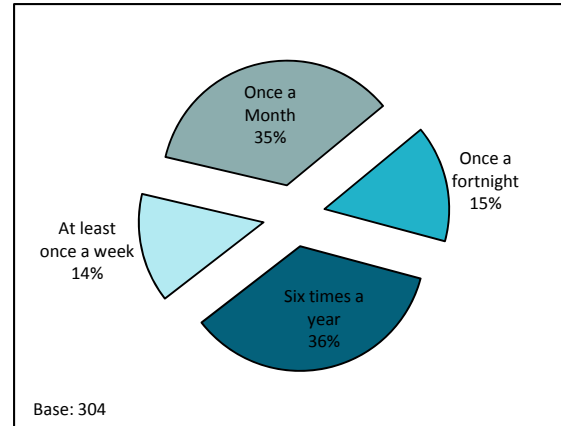
According to the FRDC sustainability study conducted in April 2011, 43% of adult Australian never go fishing, while **about one in five (20%)** do so **regularly**, that is at least six times a year.

How many adult Australians go fishing



Source: FRDC, Community perceptions of the sustainability of the fishing industry in Australia, April 2011

Fishing frequency among regular fishers



This survey of regular recreational fishers demonstrates the frequency with which this group fishes. This includes a group who fish at least once a week through to those who fish less regularly at six times a year.

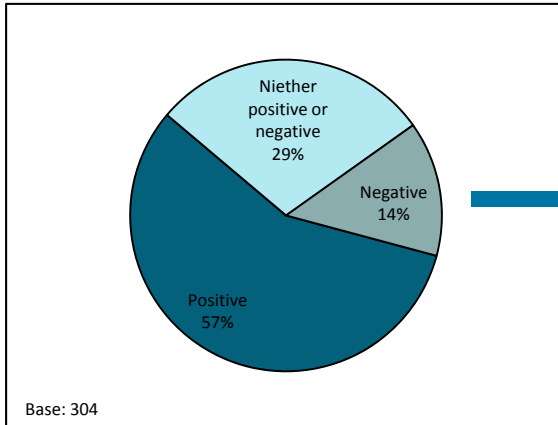
As a group they arguably represent the **‘more serious’ recreational fishers**. They are then the focus for this study.

What we asked:

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.

Detailed Results

Feelings on the future of the recreational fishing industry



Why they think the fishing industry has a **negative** future.

Three key issues underpinned the small number of regular recreational fishers who were not positive about the future of the fishing industry. They included:

- Concerns about over regulation of the industry; feedback made comment in regards the number of rules and regulations now in place resulting in fishing becoming more of a challenge than fun.
- Depletion of fish stocks was an ever present concern for many of these fishers. This was seen to be a result of over fishing by both the commercial and recreational fisher sectors.
- Perceptions of increasingly limited areas where recreational fishers can fish; altering for some the fundamental 'free range' appeal of going fishing.

Segmentation tables

| | Sex | | Fishing Frequency | | | |
|------------------------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 201 | 102 | 43 | 45 | 111 | 105 |
| Positive | 58% | 55% | 72% | 69% | 50% | 52% |
| Neither Positive or Negative | 26% | 33% | 16% | 22% | 32% | 33% |
| Negative | 15% | 12% | 12% | 9% | 17% | 14% |

| | Age | | State | | | | |
|------------------------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 165 | 134 | 101 | 80 | 32 | 63 | 27 |
| Positive | 64% | 49% | 60% | 59% | 53% | 56% | 48% |
| Neither Positive or Negative | 29% | 29% | 27% | 26% | 34% | 29% | 37% |
| Negative | 7% | 22% | 13% | 15% | 13% | 16% | 15% |

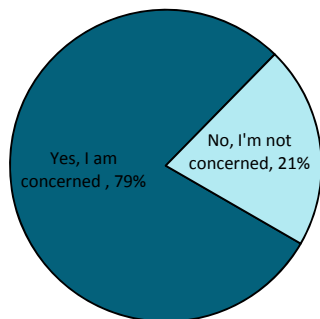
What we asked:

How would you describe your feelings about the future of the recreational fishing industry over the next 12 months? Would you say you feel . . .

And why do you say you are [fairly/very] negative about the future of the recreational fishing industry over the next 12 months?

Concern for public perception of the recreational fishing industry.

Base: 304



The overwhelming majority of regular recreational fishers are concerned for the general public's perception of recreational fishing.

Segmentation tables

| | Sex | | Fishing Frequency | | | |
|---|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 201 | 102 | 43 | 45 | 111 | 105 |
| Concerned for the public perception | 79% | 78% | 88% | 73% | 84% | 72% |
| Not concerned for the public perception | 21% | 22% | 12% | 27% | 16% | 28% |

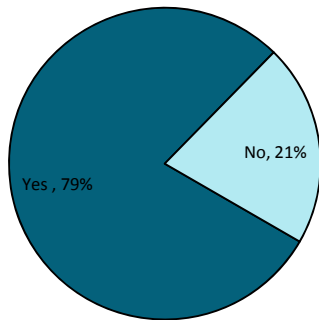
| | Age | | State | | | | |
|---|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 165 | 134 | 101 | 80 | 32 | 63 | 27 |
| Concerned for the public perception | 78% | 81% | 80% | 79% | 75% | 81% | 74% |
| Not concerned for the public perception | 22% | 19% | 20% | 21% | 25% | 19% | 26% |

What we asked:

Is the general public's perception of the recreational fishing industry something that you care for or are concerned about?

Concern for public perception on the recreational fishing industry.

Base: 304



As shown opposite, the overwhelming majority of regular recreational fishers reported being concerned about the public's perception of the fishing industry. Their concerns were articulated through mentions of:

- A recognition that it is the general public who are the purchasers and consumers of fish; their views and opinions are therefore of relevance;
- The need to protect and defend the reputation of the fishing industry;
- Mentions of concerns over safety issues and how this may impact on the 'brand' of recreational fishing – this included both 'on boat' and 'on shore' events;
- The fundamental necessity to attract and retain support for the public in order to continue the support of Governments;
- The need to continue to drive efforts to be both environmentally conscious and do things which protect the environment;
- The need to be alert to an imbalance in the presentation of facts and information about recreational fishers; a number highlighted instances of where misinformation creates a particularly adverse picture of recreational fishers;
- To monitor and manage the inevitable fall out from bad and poor behaviors from some recreational and commercial fishers

What we asked:

Is the general public's perception of the recreational fishing industry something that you care for or are concerned about?

About Recreational Fishers

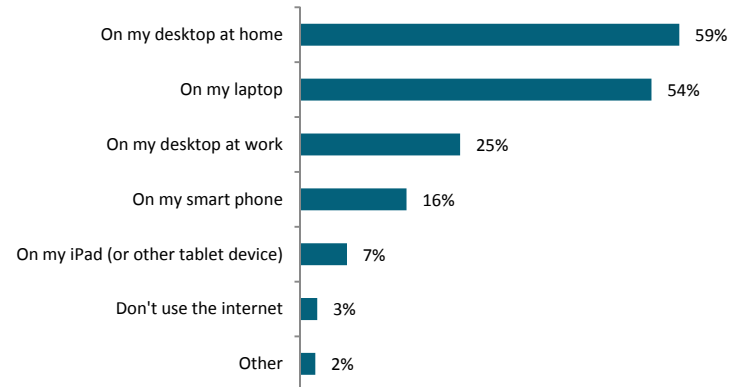
Regular recreational fishers currently use **traditional mediums** (TV and print media) together with **word of mouth** (other fishers, retail stores) to discover information about the industry.

Feedback from the survey suggests that these mediums together with more direct communication through **email** are likely to remain the information sources preferred by this stakeholder group.

The preference for accessing information via **email** presents an opportunity for organisation like FRDC to commence an engagement with recreational fishers.

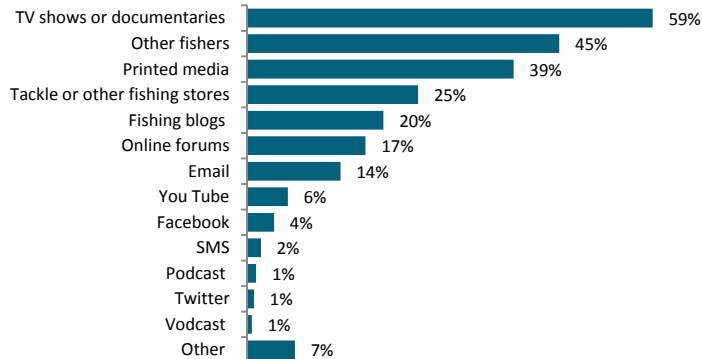
How do you search the internet for information

Base: 304



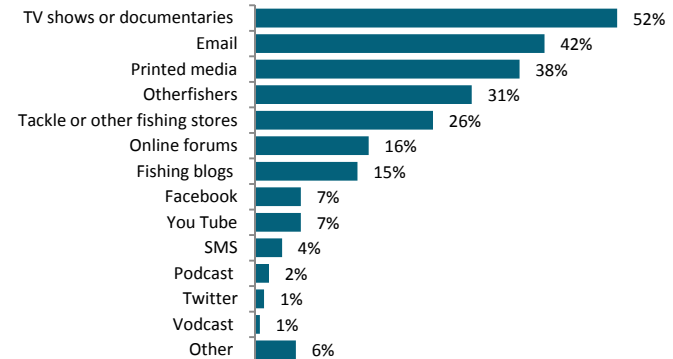
Current access to information on research.

Base: 304



Prefer to access to information on research .

Base: 304



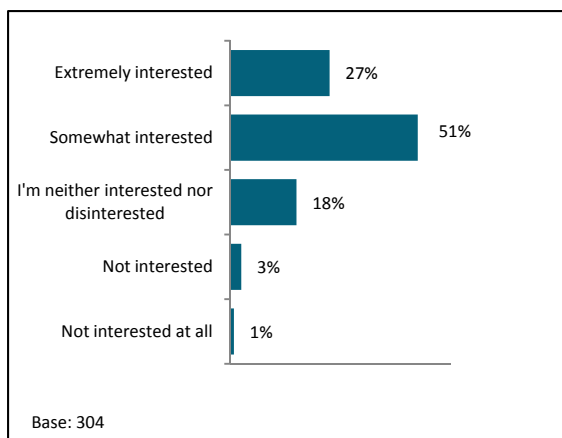
What we asked:

How do you usually search the internet for information? Do you usually do this on your computer, laptop, tablet or on your smart phone?

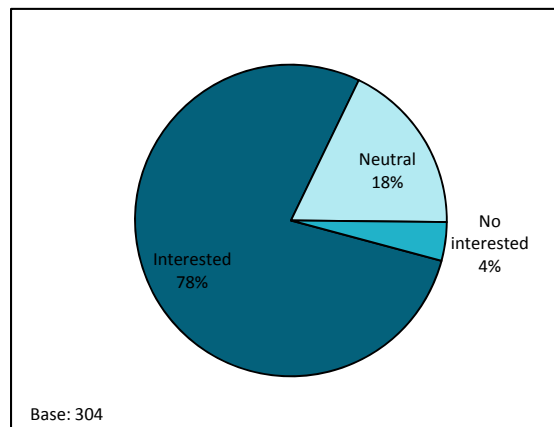
How do you currently receive or get access to information on research on the fishing industry?

How would you prefer to receive or get access to information on research on the fishing industry?

How interested are you in information and stories relating to the latest research and development in fishing?



How interested are you in information and stories relating to the latest research and development in fishing?



Segmentation tables

| | Sex | | Fishing Frequency | | | |
|------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 201 | 102 | 43 | 45 | 111 | 105 |
| Interested | 82% | 71% | 95% | 76% | 74% | 75% |

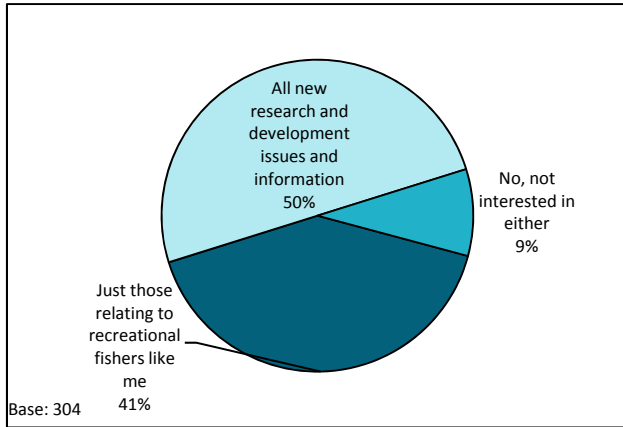
| | Age | | State | | | | |
|------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 165 | 134 | 101 | 80 | 32 | 63 | 27 |
| Interested | 75% | 81% | 80% | 78% | 78% | 75% | 78% |

What we asked:

How interested are you in information and stories relating to the latest research and development in fishing?

And are you interested in new developments that relate just to recreational fishers like yourself or new developments and research that relate to other parts of the fishing industry?

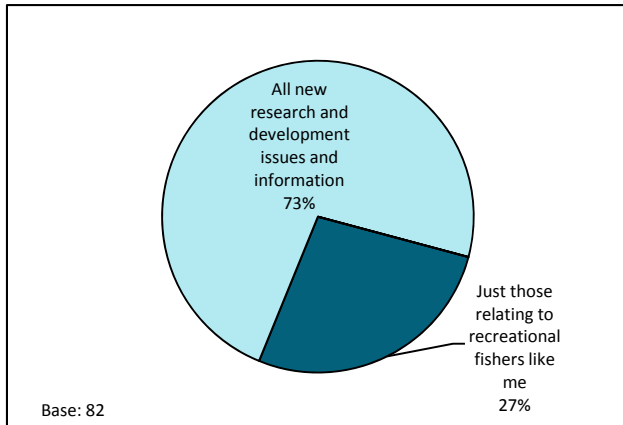
Among all regular recreational fishers



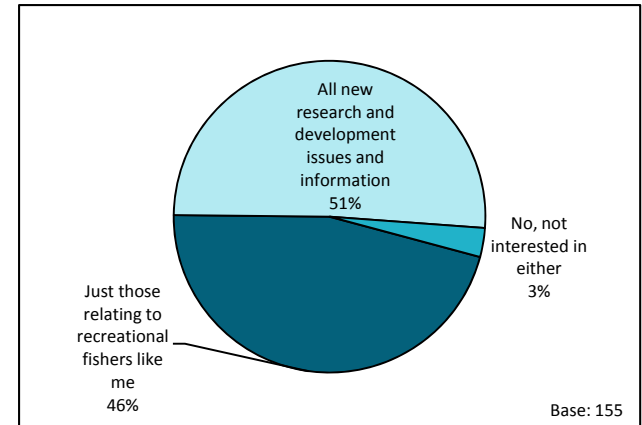
While there is interest in stories and information specific to the recreational fishing sector, the results also clearly point to and indicate an **appetite for broader industry R&D issues and information.**

This should be seen as evidence of a latent **demand for appropriately targeted and engaging stories and information** to this key stakeholder audience.

Among regular recreational fishers who are extremely interested in stories about R&D



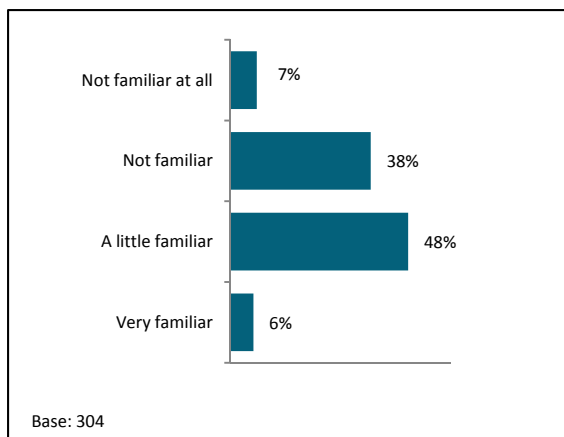
Among regular recreational fishers who are somewhat interested in stories about R&D



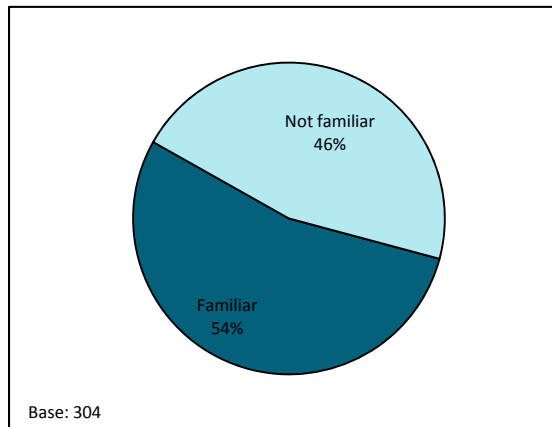
What we asked:

And are you interested in new developments that relate just to recreational fishers like yourself or new developments and research that relate to other parts of the fishing industry?

Familiarity with R&D



Familiarity with R&D



Segmentation tables

| | Sex | | Fishing Frequency | | | |
|-----------------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 201 | 102 | 43 | 45 | 111 | 105 |
| Familiar with R&D | 57% | 50% | 81% | 64% | 53% | 41% |
| Not familiar with R&D | 43% | 50% | 19% | 36% | 47% | 59% |

| | Age | | State | | | | |
|-----------------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 165 | 134 | 101 | 80 | 32 | 63 | 27 |
| Familiar with R&D | 61% | 49% | 49% | 60% | 66% | 56% | 44% |
| Not familiar with R&D | 39% | 51% | 51% | 40% | 34% | 44% | 56% |

What we asked:

How familiar would you say that you are with the research and developments that have occurred in the fishing industry in the past few years?

Most successful advancement in the fishing industry coming from research and development

Of the 304 regular recreational fishers who were asked this question:

- 188 provided a response
- 116 indicated that they did not know or could not provide a response

Regular recreational fishers were able to nominate and describe a number of different areas where they considered research and development had contributed to an advancement of the Australian fishing industry. Their responses included mention of:

- Success in **managing fish stocks** overall with specific mentions of:
 - Restocking programs
 - Breeding programs
 - Bag limits
 - Fish farming / aquaculture
- Success in and through **the creation of marine parks**; this was mentioned by a number of recreational fishers as a significant long term benefit for the industry;
- Success in the identification and commercialization of **new technology** including GPS and fish finders; although not a typical R&D deliverable for recreational fishers there was a clear linkage from R&D to a product of use when fishing;
- Success in managing and influencing **public perceptions** on the fishing industry through the use of information, facts and evidence;
- Success in working towards making the industry **sustainable**; while many fishers who mentioned this did not articulate what shape or form sustainable took it was for a number a top of mind success for the industry;
- Success in improving **better facilities** from the revenue obtained through fishing licences, including for example new boat ramps; again not a typical or expected R&D type outcome but in the minds of some recreational fishers this is a product of the R&D investment supported by the industry.
- Success through better **management and controls** on the commercial fishing sector; for a number of recreational fishers, efforts in this area were seen as a major success for the industry as a whole.

What we asked:

What has been in your opinion the most successful advancement for the whole fishing industry that has come from research and development? Please provide as much detail as possible.

Most significant challenges facing the industry in the next 5 years

Of the 304 regular recreational fishers who were asked this question:

- 251 provided a response
- 53 indicated that they did not know or could not provide a response

Regular recreational fishers were able to nominate and describe a number of different challenges that will confront the industry in the next five years. As noted by some these challenges exist today but are unlikely to be resolved immediately and so remain as constant challenges for the industry as a whole. Their responses included mention of:

- Providing sufficient **supply of fish** and associated products to meet growing demand through an increased population;
- Managing and solving growing concerns about **pollution** and water quality issues – both inland and coastal concerns were mentioned;
- Ensuring that **over fishing** does not create long term sustainability issues – one of the challenges will be demonstrating that reduced bag limits actually work;
- Dealing with **safety** issues – both on boat and on shore;
- Managing and ensuring the **conservation** of important fish species;
- Creating tighter **controls on commercial fishers** to ensure compliance with limits, lower wastage and dealing effectively with international fishers seen to be raiding Australian waters;
- Ensuring there is not **over regulation** of the industry by Government authorities;
- Ensuring there is **compliance** with the standards and rule set up from and coming out of the research conducted by the industry.

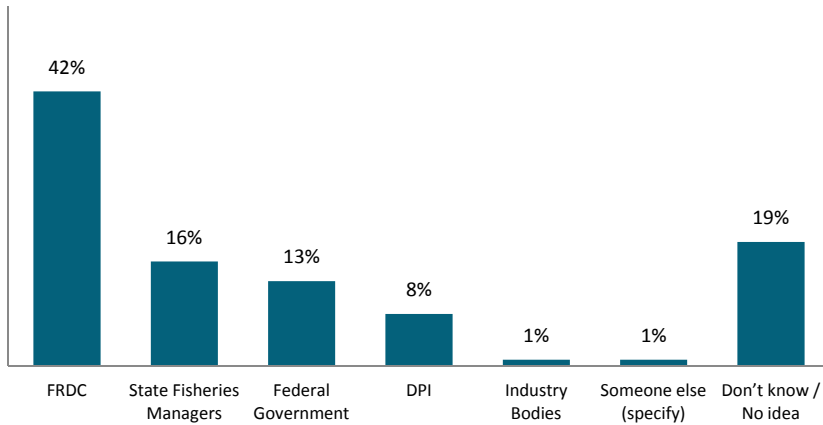
What we asked:

And what in your opinion is the most significant challenge that the fishing industry has to face in the next five years? Do you think research and development can and should have a role to play in resolving this issue? Please provide as much detail as possible.

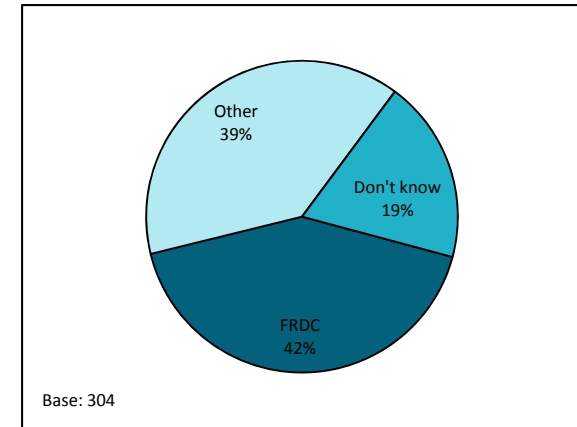
regular recreational fishers awareness,
knowledge and involvement with the Fisheries
Research and Development Corporation (FRDC)

Management of National research and Development

Base: 304



Management of National Research and Development



Segmentation tables

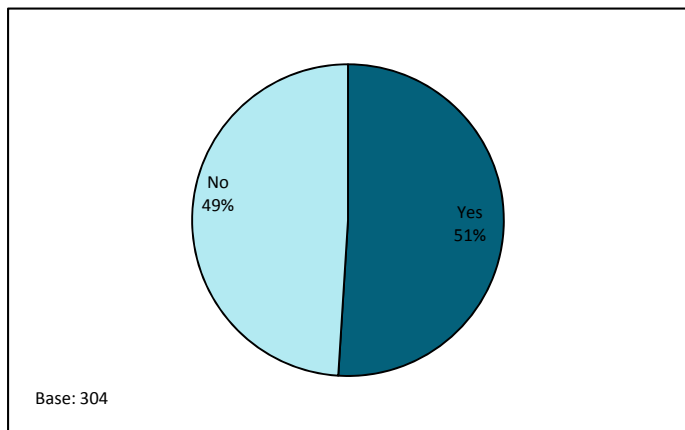
| | Sex | | Fishing Frequency | | | |
|------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 201 | 102 | 43 | 45 | 111 | 105 |
| FRDC | 38% | 51% | 42% | 40% | 41% | 46% |
| Other | 43% | 29% | 46% | 44% | 36% | 33% |
| Don't Know | 19% | 20% | 12% | 16% | 23% | 21% |

| | Age | | State | | | | |
|------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 165 | 134 | 101 | 80 | 32 | 63 | 27 |
| FRDC | 17% | 43% | 39% | 40% | 59% | 37% | 56% |
| Other | 64% | 38% | 39% | 44% | 32% | 39% | 22% |
| Don't Know | 19% | 19% | 22% | 16% | 9% | 24% | 22% |

What we asked:

To the best of your knowledge which organisation is responsible for managing and investing in National Research and Development across the Australian fishing industry?

Heard of Fisheries Research and Development Corporation (FRDC)



Reported awareness of FRDC was high, with one in two regular recreational fishers reporting they had 'heard' of FRDC.

Segmentation tables

| | Sex | | Fishing Frequency | | | |
|--------------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 201 | 102 | 43 | 45 | 111 | 105 |
| Yes, heard of FRDC | 48% | 56% | 54% | 51% | 47% | 53% |

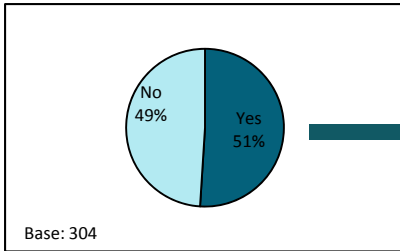
| | Age | | State | | | | |
|--------------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 165 | 134 | 101 | 80 | 32 | 63 | 27 |
| Yes, heard of FRDC | 52% | 49% | 50% | 48% | 69% | 41% | 63% |

What we asked:

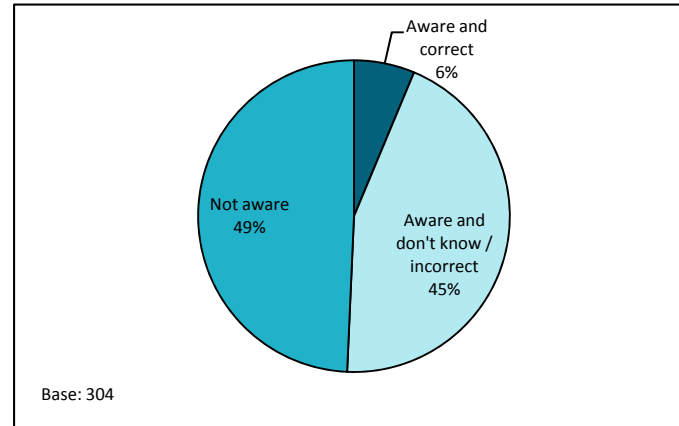
Before today had you heard of Fisheries Research and Development Corporation or FRDC?

Understanding of Fisheries Research and Development Corporation (FRDC)

Heard of FRDC



Among fishers aware of FRDC we asked them to describe FRDC's responsibilities



Despite strong levels of reported awareness of FRDC (heard of FRDC), the study results clearly show **very few regular recreational fishers know much about FRDC, its role or responsibilities.**

So while the name generates some familiarity there is little knowledge about the organisation.

What we asked:

And what is your understanding of FRDC's role and responsibilities?

Detailed Results

Among all regular recreational fishers
Importance of FRDC

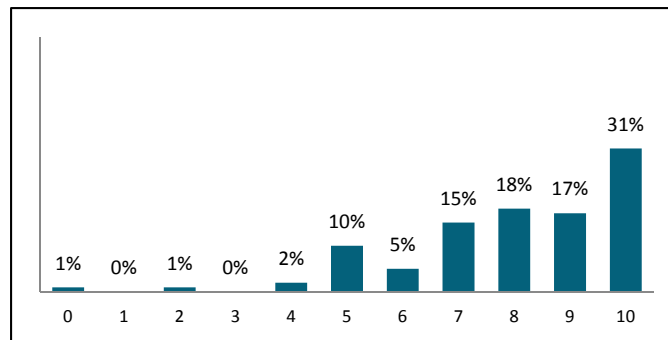
Base: 300



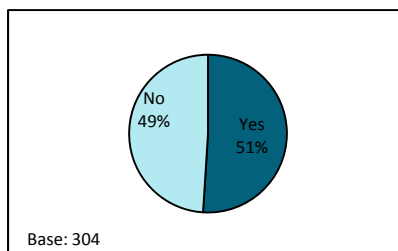
Of no importance
at all

Extremely
Important

Rating distribution



Aware of FRDC



Among fishers aware of FRDC
Importance of FRDC

Base: 147



Of no importance
at all

Extremely
Important

Among fishers not aware of FRDC
Importance of FRDC

Base: 153



Of no importance
at all

Extremely
Important

Scale; 0 = Of no importance at all... 10 = Extremely Important.

What we asked:

In your view, how important is it for the Australian fishing industry to have an organisation like FRDC?

Detailed Results

Among all regular recreational fishers
Importance of FRDC

Base: 300



Of no importance
at all

Extremely
Important

Segmentation tables

| | Sex | | Fishing Frequency | | | |
|--------------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 198 | 101 | 43 | 44 | 109 | 104 |
| Importance of FRDC | 7.9 | 8.1 | 7.8 | 7.7 | 7.9 | 8.1 |

| | Age | | State | | | | |
|--------------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 162 | 133 | 99 | 79 | 32 | 62 | 27 |
| Importance of FRDC | 7.9 | 8.1 | 7.9 | 8.2 | 7.8 | 8.0 | 7.7 |

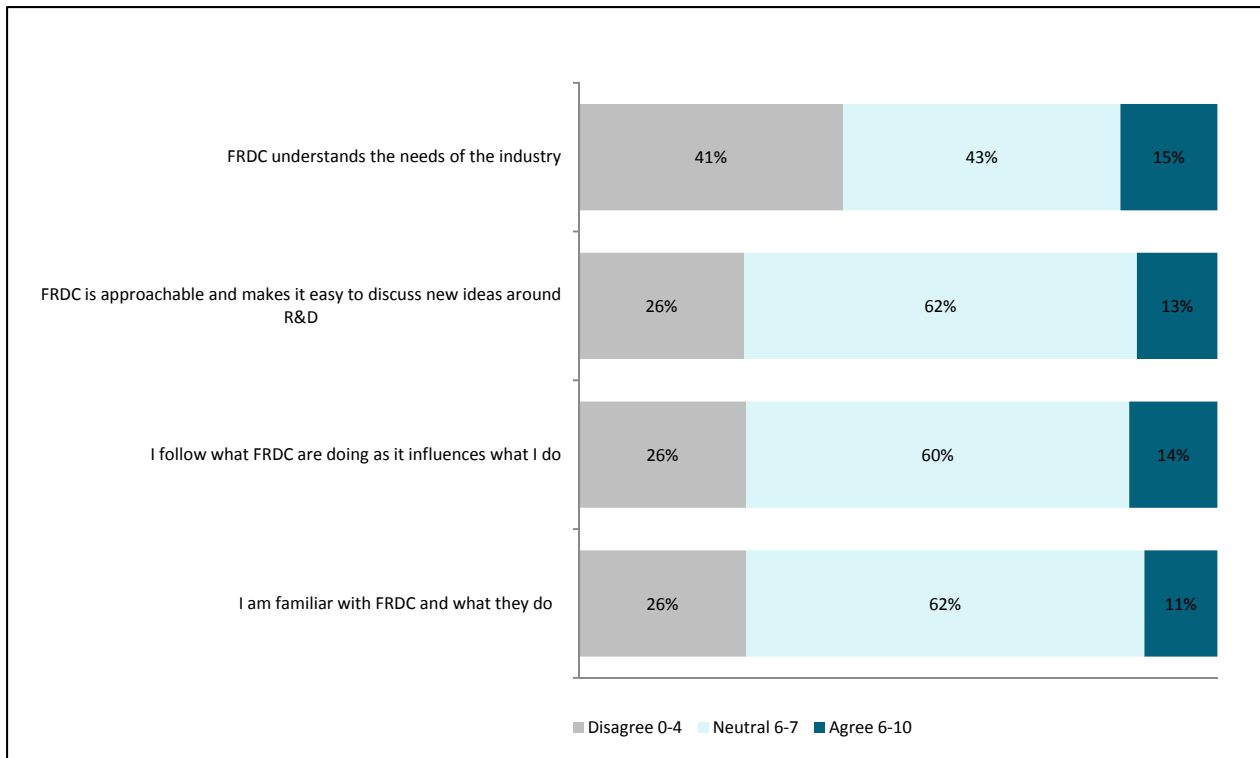
Scale; 0 =Of no importance at all... 10 =Extremely Important.

What we asked:

In your view, how important is it for the Australian fishing industry to have an organisation like FRDC?

Among fishers aware of FRDC we asked their agreement with a number of statements

Base: 149



Scale; 0 = Completely disagree... 10 = Completely agree.

What we asked:

Please think about your relationship with FRDC. Please rate how strongly you agree with each of the following statements.

Detailed Results

Among fishers aware of FRDC we asked their satisfaction with FRDC investments

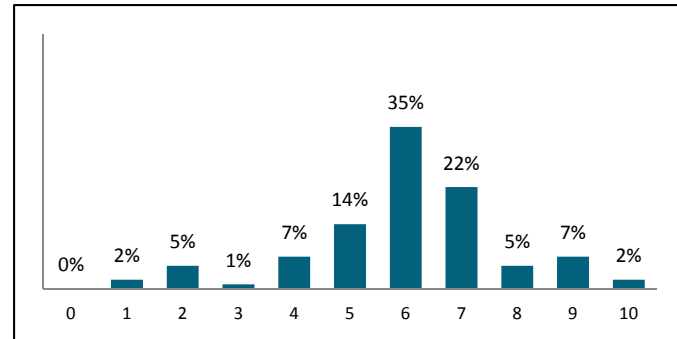
Base: 153



Extremely dissatisfied

Extremely Satisfied

Rating distribution



Segmentation tables

| | Sex | | Fishing Frequency | | | |
|-----------------------------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 96 | 56 | 23 | 23 | 52 | 55 |
| Satisfaction with FRDC Investment | 7.0 | 6.9 | 7.1 | 6.9 | 7.1 | 6.9 |

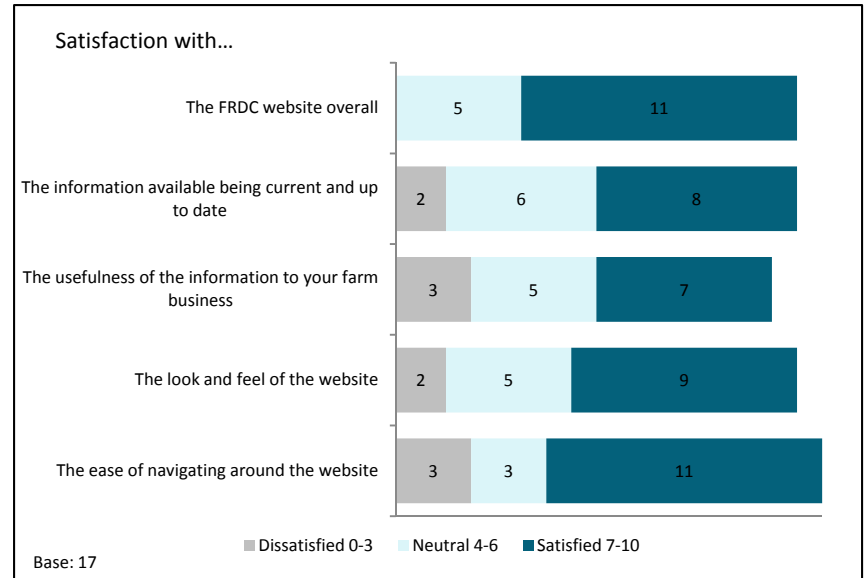
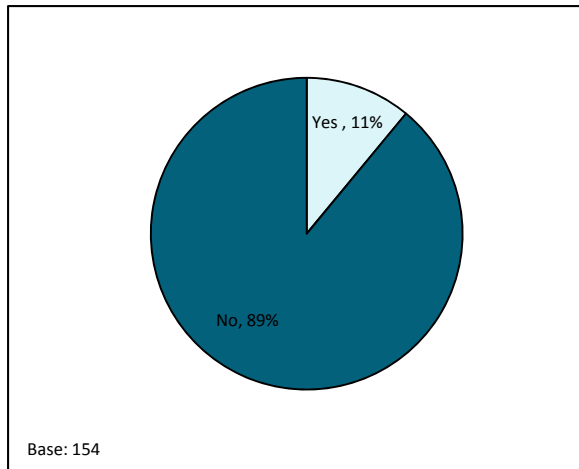
| | Age | | State | | | | |
|-----------------------------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >44 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 85 | 65 | 50 | 38 | 21 | 26 | 17 |
| Satisfaction with FRDC Investment | 7.1 | 7.0 | 7.1 | 7.2 | 6.6 | 7.1 | 6.7 |

Scale; 0 = Completely dissatisfied... 10 = Completely satisfied.

What we asked:

Based on what you know about FRDC, overall how satisfied are you that the contributions FRDC receives from the fishing industry are being invested wisely in research and development for the benefit of all stakeholders?

Among fishers aware of FRDC we asked whether they had recently visited the FRDC site



What we asked:

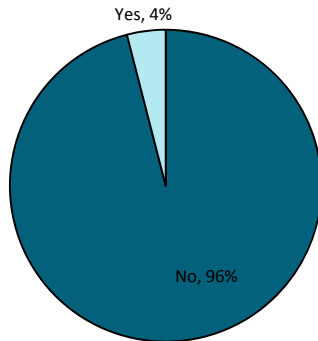
In the past 12 months have you visited the FRDC website for any information?

How satisfied were you with the FRDC website in terms of . . .

FISH magazine

FRDC produces the quarterly FISH magazine. Do you receive the FISH magazine?

Base: 304



Which of the following best describes what you **usually** do when you receive the FISH magazine? Would you say you . . .

Base: 13

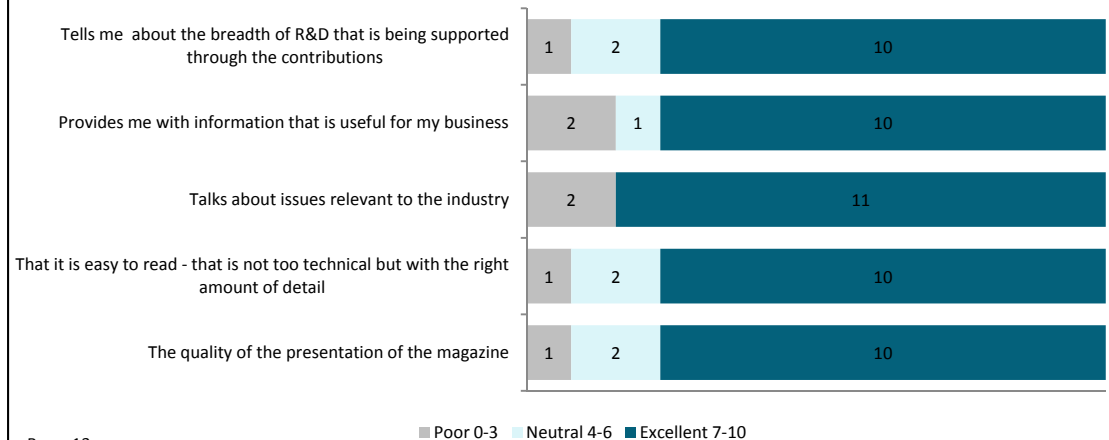
| | n |
|----------------------|----|
| Just scan through it | 3 |
| Read it thoroughly | 10 |

Do you keep your copy of FISH, pass it on to other work colleagues or people in the industry or discard it once you read it?

Base: 13

| | n |
|------------|----|
| Keep it | 10 |
| Pass it on | 1 |
| Discard it | 2 |

Satisfaction with...



What we asked:

FRDC produces the quarterly FISH magazine. Do you receive the FISH magazine?

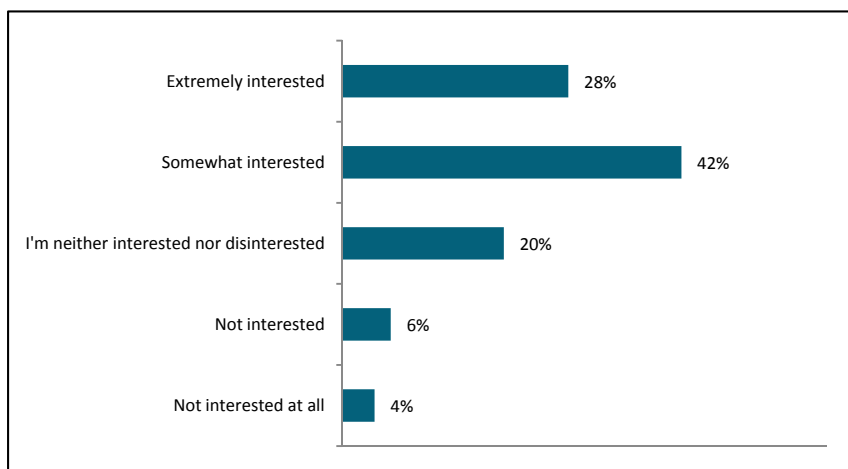
Do you keep your copy of FISH, pass it on to other work colleagues or people in the industry or discard it once you read it?

Which of the following best describes what you **usually** do when you receive the FISH magazine? Would you say you . . .

Using a scale of 0 to 10, where 0 = poor and 10 = excellent, how would you rate the FISH magazine in terms of . . .

Online access to FISH

Base: 303



What would you change about FISH magazine?

With very few regular recreational fishers receiving FISH there was then only a few responses to the question around what could be improved with the magazine. Feedback that was provided included mentions of:

- An interested in more personal stories, provide more of a platform for more letters, profiles and showcase of individuals and groups;
- Some specific information about specific state issues, research and developments, perhaps in a short state by state format.

Care should obviously be taken in making too much of this feedback given the very small numbers who provided feedback to this question.

Segmentation tables

| | Sex | | Fishing Frequency | | | |
|----------------|------|--------|---------------------|------------------|--------------|-----------------|
| | Male | Female | At least one a week | Once a fortnight | Once a month | Six time a year |
| <i>n</i> | 201 | 102 | 43 | 45 | 111 | 105 |
| Interested | 72% | 67% | 84% | 65% | 71% | 66% |
| Not Interested | 8% | 15% | 2% | 9% | 13% | 11% |

| | Age | | State | | | | |
|----------------|-----|-----|---------|---------|-------|-----|-----|
| | <45 | >45 | NSW/ACT | VIC/TAS | WA/NT | QLD | SA |
| <i>n</i> | 165 | 134 | 101 | 80 | 32 | 63 | 27 |
| Interested | 70% | 73% | 67% | 74% | 75% | 73% | 59% |
| Not Interested | 9% | 10% | 13% | 5% | 13% | 8% | 15% |

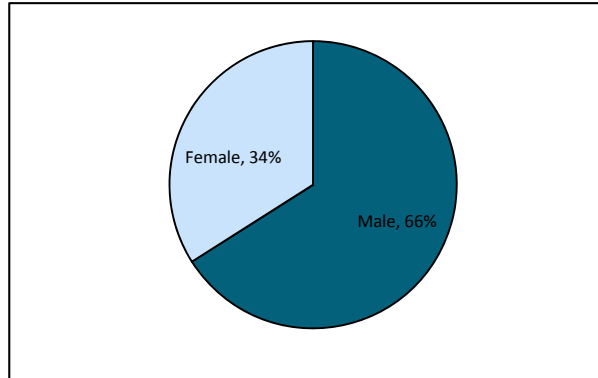
What we asked:

How interested would you be in receiving **online** access to the FISH magazine in the future?

What would you change about FISH magazine?

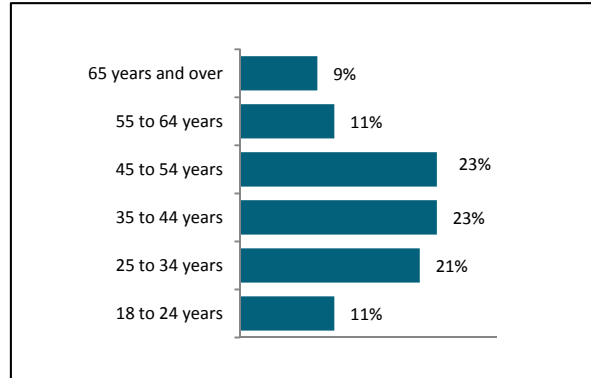
about the recreational fishers who
responded to the survey

Gender



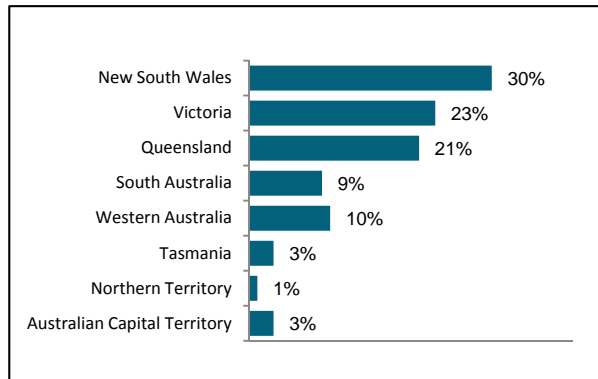
Base: 303

Age



Base: 298

State



Base: 303

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

Methodology

To access regular recreational fishers in a cost efficient manner, it was agreed that using an established reputable online panel of adult Australians would be appropriate. With this in mind, an online survey invitation was sent to an online panel above the age of 18 years. The sample was drawn randomly, with respondents from the panel required to fulfil the fishing regularity screening questions. There were no quotas set on age, gender or location.

Sample

In total n = 304 surveys were completed by participants.

Questionnaire

Participants were asked to complete a 10 min online survey which covered a range of topics relating to their awareness and their thoughts about the Australian fishing Industry.

Timing

The online survey was launched on September 1, 2011 and remained open until September 14, 2011.