



# COMMUNITY SENTIMENT SURVEY

PROJECT: 2023-200

THIS PROJECT IS SUPPORTED BY FUNDING FROM THE FISHERIES RESEARCH  
AND DEVELOPMENT CORPORATION ON BEHALF OF THE AUSTRALIAN GOVERNMENT



# About the research

## **A context for the research**

Australia's Commonwealth, state and territory governments together with regulatory bodies and local authorities have worked in partnership with the fishing industry, scientists, economists, environmental non-government organisations to establish management frameworks for fishing in and around Australia.

These management processes implement controls, such as limits on catch or effort levels, and regulation of fishing methods to manage Australia's fisheries in a sustainable way. It also includes the definition and description of different fishing zones and areas.

Nominated Australian fisheries and marine park areas are two critical foundations for the description of some of the areas in and around Australia.

## **The need for information**

A need to understand the Australian community's awareness and understanding of these zones has been identified. A measure of the support for commercial fishers to operate in these areas was also seen as an important measures to collect and describe.

These measures will provide Governments and industry the opportunity to plan for their communications and engagement with the Australian community on these two key zones.

This research was designed to provide a snapshot of the community's awareness, knowledge and perceptions of Australian fisheries, marine parks and commercial fishers who may operate in these designated areas.

A representative sample of n = 1,000 adult Australians was captured in this community sentiment survey. A more detailed explanation of the research design is provided in the attachments to this report.

The key results from the 2024 Community Sentiment Survey now follows.



# Sentiment Scorecard

We spoke to a representative sample of n = 1,000 Australians.

*The community has, at best, a modest understanding of fisheries and marine parks...*



64% had little or no understanding of what a fishery is



74% were aware that commercial fishers operate in fisheries

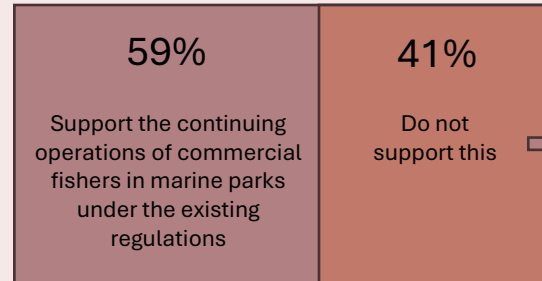


64% had little or no understanding of what a marine park is



25% were aware that commercial fishers can operate in marine parks

*There are mixed views about commercial fishers operating in marine parks...*



Of this sub-group, about 18% of the 41% moderated their views when provided more details of the controls in place for commercial fishers.

*The results indicate more impact on people's intended purchasing behaviours and likelihood to recommend when their preferred species is sourced from a marine park...*



16% would definitely continue to purchase the preferred seafood species if the fishery became a marine park and the commercial fishing operations continue

while. . .



71% were uncertain (would consider it or were not sure)



-39 NPS: would people recommend this species of fish/seafood to other friends and family if you became aware the fishery became a marine park



Detailed Results



# Australian Fisheries: familiarity and awareness

Before presented with the following question, the respondents were provided context to certain terms that relate to fishing in Australian waters:

*“In Australia, a fishery is an area where fish are caught for commercial or recreational purposes. It can be a defined body of water or a collection of fishing activity that have been agreed upon by the Australian Government and fishers.*

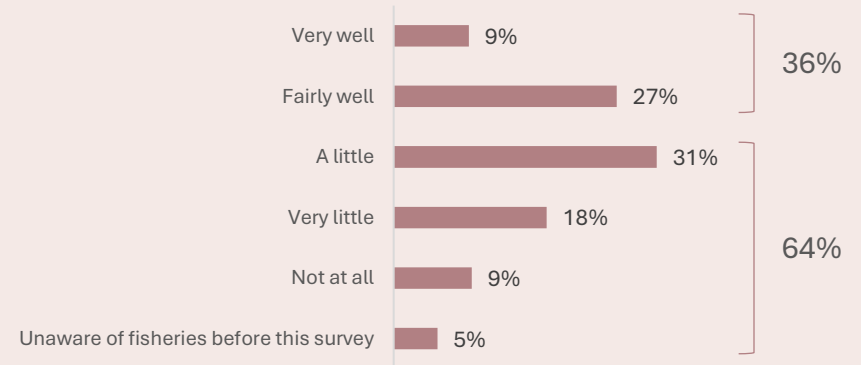
*You often have different fisheries for each target species of fish or shellfish (for example there is a rock lobster fishery, an abalone fishery or the Southern Bluefin fishery – and many more)*

*Australia’s Commonwealth, state and territory governments manage fisheries in consultation with the fishing industry, scientists, economists, environmental non-government organisations.*

*These management processes implement controls, such as limits on catch or effort levels, and regulation of fishing methods to manage Australia’s fisheries in a sustainable way.”*

Q6. Before this survey, how well would you say that you understood what an Australian ‘fishery’ referred to?

Base: All respondents, n = 1,000



The survey results indicate a modest level of understanding of Australian fisheries.

Almost two in three reported they had little or no understanding of what an Australian fishery is...

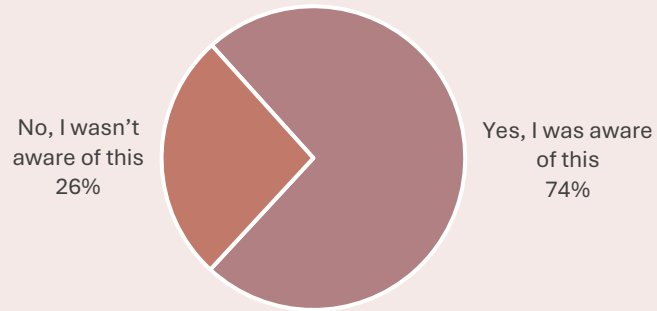
## Differences by key segments

	Gender		Age Group						Seafood Consumption			
	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	Frequent (once a week or more)	Regular (once a fortnight to once a month)	Infrequent (no more than once every two months)	Do not eat / not sure
Base:	500	497	114	193	172	166	128	227	478	329	137	56
% very well + fairly well	41%	30%	38%	46%	38%	28%	31%	31%	41%	34%	25%	23%

# Australian Fisheries: awareness that commercial fishers operate

Q7. Were you aware that commercial fishers operating in an Australian fishery are subject to regulations including the volume of specific fish species can be caught, the methods they use to fish and their responsibility for managing species in the fishery?

Base: All respondents, n = 1,000



Despite a modest understanding of fisheries, the majority reported they were aware that commercial fishers operate in fisheries.

It is likely that the result reflects respondents reporting what they perceive to be the case.

## Differences by key segments

	Gender		Age Group						Seafood Consumption			
	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	Frequent (once a week or more)	Regular (once a fortnight to once a month)	Infrequent (no more than once every two months)	Do not eat / not sure
Base:	500	497	114	193	172	166	128	227	478	329	137	56
% very well + fairly well	77%	70%	64%	74%	69%	69%	77%	82%	80%	71%	67%	47%

# Australian Marine parks: familiarity and awareness

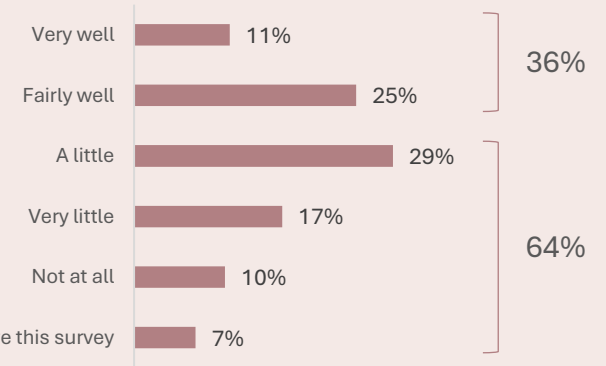
Before presented with the following questions, the respondents were provided context to certain terms that relate to fishing in Australian waters:

*“Australian Marine Parks help conserve marine habitats and the marine species that live within and rely on these habitats.*

*A marine park is a designated park consisting of an area of sea (or lake) set aside to achieve ecological sustainability, promote marine awareness and understanding, enable marine recreational activities, and provide benefits for Indigenous peoples and coastal communities”*

Q8. Before this survey, how well would you say that you understood what an Australian ‘marine park’ referred to?

Base: All respondents, n = 1,000



The survey results also indicate a modest level of understanding of Australian marine parks.

Just under two in three reported that had little or no understanding of what an Australian marine park is...

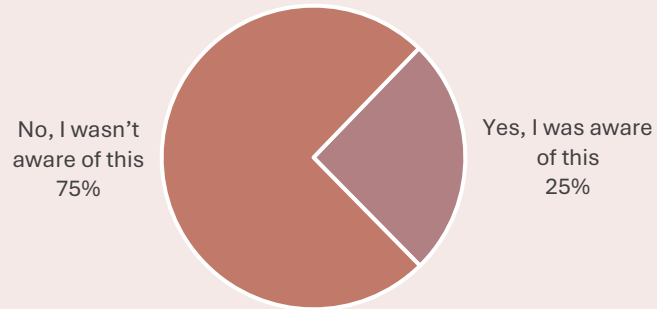
## Differences by key segments

	Gender		Age Group						Seafood Consumption			
	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	Frequent (once a week or more)	Regular (once a fortnight to once a month)	Infrequent (no more than once every two months)	Do not eat / not sure
Base:	500	497	114	193	172	166	128	227	478	329	137	56
% very well + fairly well	42%	30%	34%	45%	35%	24%	34%	40%	44%	31%	25%	22%

# Australian Marine parks: awareness that commercial fishers operate

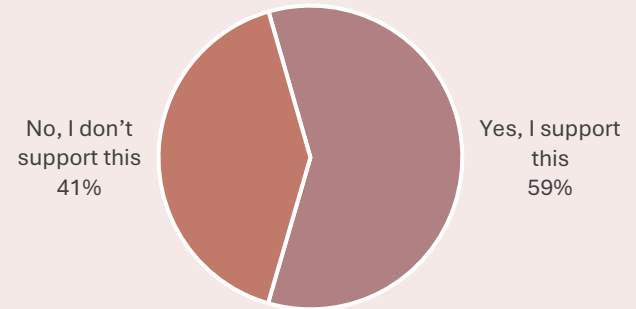
Q9. Were you aware that commercial fishers may remain operating under the existing regulations if a fishery becomes a marine park?

Base: All respondents, n = 1,000



Q10. Do you support the continuing operations of commercial fishers in marine parks under the existing regulations?

Base: All respondents, n = 1,000



Three in four respondents were not aware that some commercial fishers may continue to operate in marine parks.

Views were divided on whether they supported this practice, with slightly more respondents (59%) providing some level of support.





## Marine parks – why do they support the operations of commercial fishers

59% of respondents supported the continuing operations of commercial fishers in marine parks under the existing regulations.

Here is a sample of their reasons for supporting this...

*"Economic benefits: Fisheries are vital to the economies of many regions. The activities of commercial fishermen contribute to local economies by providing employment opportunities and supporting fisheries-related chains. Food Security and Supply: Fisheries are one of the most important sources of food for human beings. Continuing to support commercial fishermen's operations ensures a stable supply of seafood and meets the demand for healthy food. Cultural heritage and community life: In many places, communities and cultures are closely linked to fisheries, and commercial fishermen's operations are part of local traditions and ways of life. Maintaining fishing activities helps to preserve the cultural heritage and way of life of communities."*

*"Many Australian trawlers are run by owner operators who are very aware that their continued operation is dependent on the fisheries remaining sustainable for those species. I would rather support these fishers than the mega trawlers that run through international corporations and fleets."*

*"I believe it is crucial to certain species of fish and other marine life that they are under a protection of sorts. Failure to do so may end up in an endangering level of numbers. These breeds must be able to produce life at the same rate as being fished and eaten."*

*"With regulations in place and monitoring of the fishery will achieve a good balance. If we restrict our fisheries then in order to meet demand we will be required to import more seafood and open the country to possible bio security issues."*

*"Commercial fishing in marine parks are regulated by the responsible body so there is no 'scare' /'danger' that the marine parks would be affected. They were commercially fishing there before prior to them being declared as marine parks."*

*"It's a balance between ecology and commercial reality - I almost said no but then what happens to the fishermen who have built up business for years if they are then denied access. perhaps there should be a time limit for the continuing."*

*"I have been fishing all of my life and have never seen our local fisheries looking healthier. Despite this people who can't fish and have no idea what they are talking about complain about fishing and allege fish numbers are dwindling."*

*"Economic Benefits: Commercial fishing provides livelihoods for many people, particularly in coastal communities. Allowing some level of commercial fishing in marine parks can sustain these livelihoods and support local economies."*

*"It is probably essential for their livelihood. I would expect their activities within marine parks to be controlled or restricted in such a way as not to endanger the purposes or functions of the marine park."*

*"Because the marine parks will continue to sustain fish life and ensure that the habitat is not disturbed and the commercial fishers are under strict guidance as to how much and where they can source fish."*

*"Carefully managed sustainable commercial fishing in our marine parks creates jobs in the fishing industry, puts money into the economy and regional communities, and delivers seafood to our plates."*

*"I don't have an issues with it, it's very important that marine fishers can continue to operate, the benefit is huge in Australia from the fisherman to all the buyers and sellers of seafood."*

*"People have to make a living and I presume that any catch from a Marine Park is highly regulated and sustainable and wouldn't be allowed if it was to cause any damage in the Marine Park!"*



## Marine parks – why don't they support the operations of commercial fishers

41% of respondents did not support the continuing operations of commercial fishers in marine parks under the existing regulations.

Here is a sample of their reasons for not supporting this...

*"The main rationale and purpose for an area to be declared a marine park is for the fish and all other species living in the declared area to be able to survive, breed and continue to exist in their natural environment. Some of the fish or aquatic species and vegetation in the declared marine park are most likely endangered. Allowing commercial fishers to continue exploiting the fauna and flora in a marine park purely for commercial gain would drive some species to extinction. And also destroy the ecosystem in that area of the ocean or lake."*

*"If a marine park is designated as such, then surely its intended purpose is to help maintain fish populations. Only if the fish can be caught sustainably, i.e. a population is conserved, should closely monitored exploitation of the fish population be allowed. But fisherman always find ways to rot the system to get around regulations. Transponders are turned off, excess catch is transferred to other boats, by-catch is understated, all the usual tricks of the trade would be used, so a complete ban on fishing is the only way."*

*"Marine parks have been created to maintain ecological habits which are delicate balances of all the different species - flora and fauna - in combination with other habitat factors like water quality, etc. Allowing commercial fishers to continue operation in these marine parks is counter to and contradicts the very purpose these marine parks were established as the fishers will change the balance of the food webs and habitats by harvesting specific species."*

*"If a marine park is used to fish in, is it still a marine park when there's dirty fishing boats possibly damaging the marine park and killing sea life. Most sea-life in the area will possibly be mostly visible in fishing nets? I guess one could do the same in a national park by letting cows roam around and pant grass for the cows or other crops after some land is cleared."*

*"If it's been designated as a Marine Park then it should be managed accordingly i.e. no exploitation of fishing and rights of fishers previously given should be reminded. The Marine Park should be a designated area where Fishers should not continue to fish certainly being Commercial that's even worse? Marine parks should be kept Free and natural."*

*"Unfortunately commercial fishers lead to the destruction of areas where they overfish. They also destroy the environment in the area. If it were a marine park, it should be a sanctuary where fish can live and breed and therefore safeguard their species and replenish their species."*

*"Commercial fishing and marine parks would seem to be mutually exclusive. How can you have a marine park that is not preserved of its fish and ecosystems? It sounds like greenwashing to me, and I do not support it. I would rather eat less seafood than tolerate this state of affairs."*

*"Well from what I have just been informed and how I interpret the information, when it becomes a marine park it becomes protected, why would it still be allowed to be fished in if the area is now protected? I understood it that marine parks are set apart from fishery areas."*

*"I don't support this. This is because the animals trapped in marine park regulated areas have no control over their surroundings - essentially being separated from their families to die. Whereas in the wild, where commercial fishers generally fish, it is natural selection."*

*"I think there is a reason it has been made into a marine park. It could be the marine park is there to protect a species from overfishing and the area is a good breeding area so it's really important that these fish species can live and breed in areas that are left alone."*

*"Marine parks are supposed to have a protected status. The value of what is considered a marine park is undermined if any commercial fishers maintain operations in what should be known as a protected park, otherwise it is simply a restricted fishery NOT a marine park."*



## Marine parks – how ‘sticky’ are the views against commercial fishers operating in marine parks

Of the **41%** of respondents who did not support the continuing operations of commercial fishers in marine parks under the existing regulations, an example of some of the controls placed on these commercial fishers was described to determine if this additional information may impact their opposition.

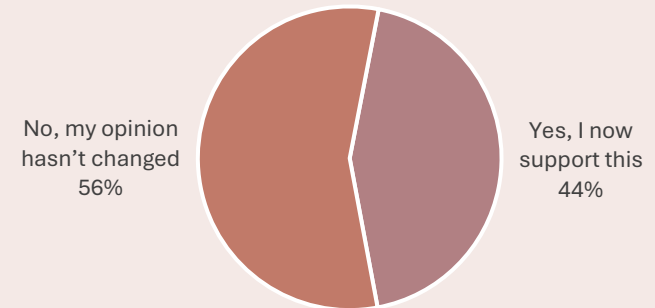
Before presented with the following question, the respondents were provided context to the operations of commercial fishers in marine parks:

*“There are commercial fishing operators who employ controls to ensure the sustainability of the fish species they catch. By way of example, some operators:*

- *Have two independent government-approved observers on board each voyage to ensure compliance with conservation measures and conditions on fishing rights are in place to ensure compliance with quotas, catch landing and verification, and limiting the impact on the environment.*
- *Have their movements within a marine park or fishery tracked by satellite navigation.*
- *Have implemented block-chain powered traceability technology.*
- *Have received third-party certification for its fishery sustainability and carbon neutral commitment.”*

Q13. Knowing this, what is your view about the commercial fishers being able to continue fishing in marine parks?

*Base: All respondents who **do not** support the continuing operations of commercial fishers, n = 422*



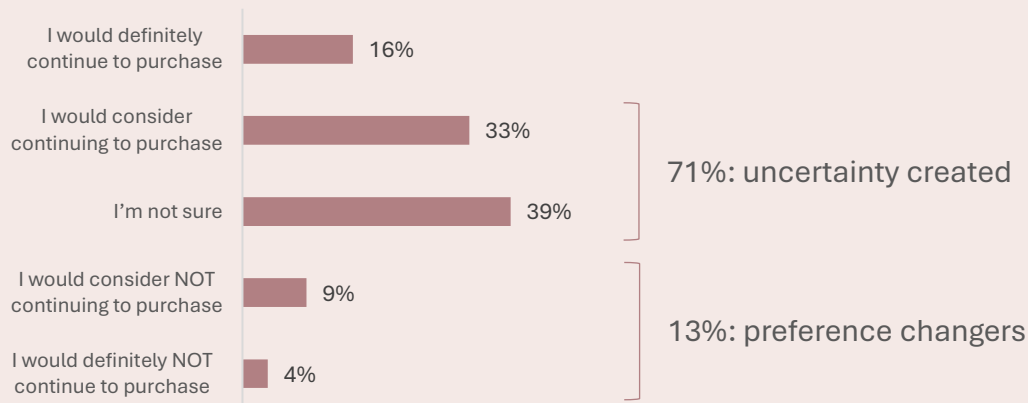
After being provide some example information, 44% (of the initial 41%, so a further 18% of the total sample) moderated their opposition and indicated they would now support the continued operations of some commercial fishers in marine parks.

The result illustrate the potential impact more complete information can have on respondents' views on this issue.

# Will seafood sourced from a marine park influence purchase preferences?

Q14. Let's assume that your preferred species of fish/seafood to purchase and consume comes from an area that is not a marine park. Would you continue to purchase this species if the fishery becomes a marine park and the commercial fishing operations continue?

Base: All respondents, n = 1,000



Despite some level of support for some commercial fishers to continue to moderate in marine parks, the result indicate a hesitation and/or reluctance to continue to purchase preferred species if that species was sourced from a marine park.

Most respondents (almost three in four at 71%) indicated some uncertainty about their future purchases.

## Differences by key segments

	Gender		Age Group						Seafood Consumption			
	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	Frequent (once a week or more)	Regular (once a fortnight to once a month)	Infrequent (no more than once every two months)	Do not eat / not sure
Base:	500	497	114	193	172	166	128	227	478	329	137	56
% I would definitely continue to purchase	21%	10%	14%	19%	14%	13%	12%	19%	21%	13%	11%	7%

# Will they promote seafood sourced from marine parks to others?

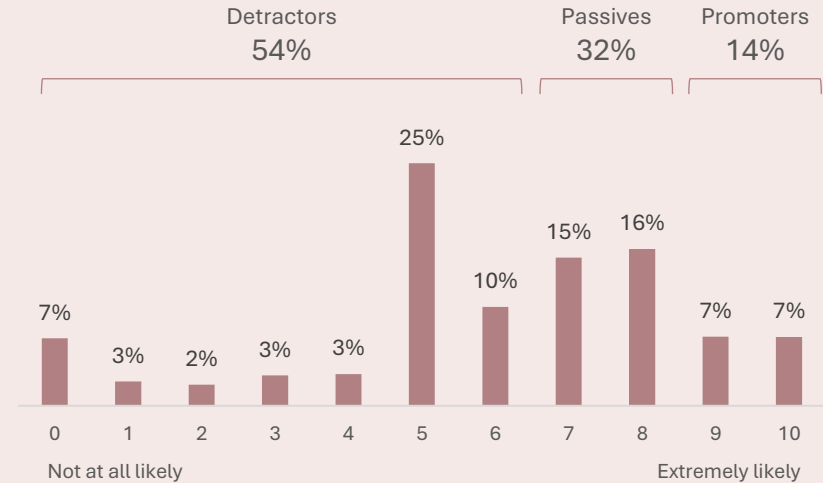
Q16. How likely would you be to recommend this species of fish/seafood to other friends and family if you became aware the fishery became a marine park?

Base: All respondents, n = 1,000



Net Promoter Score  
-39

Net Promoter Score =  
% Promoters - % Detractors



The uncertainty about their own purchase behaviours has appeared to translate to a low willingness to recommend species sourced from marine parks to other friends and family.

## Differences by key segments

	Gender		Age Group						Seafood Consumption			
	Male	Female	18-24	25-34	35-44	45-54	55-64	65+	Frequent (once a week or more)	Regular (once a fortnight to once a month)	Infrequent (no more than once every two months)	Do not eat / not sure
Base:	500	497	114	193	172	166	128	227	478	329	137	56
Net Promoter Score	-31	-48	-38	-25	-32	-50	-38	-53	-31	-42	-54	-65



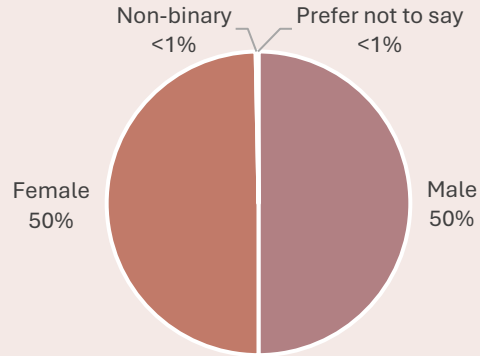
Attachments



# Respondent profiles

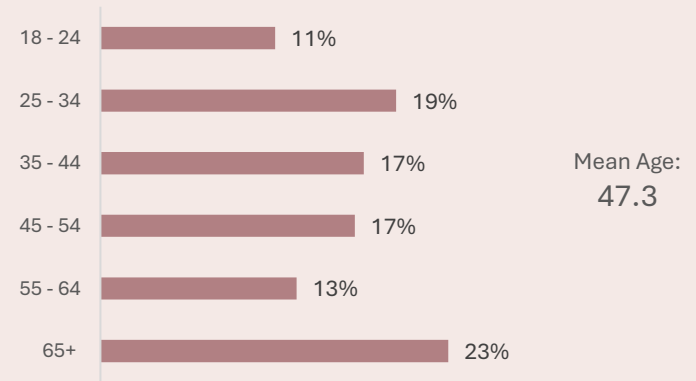
## Q2. Do you identify as...

Base: All respondents, n = 1,000. Results are provided unweighted.



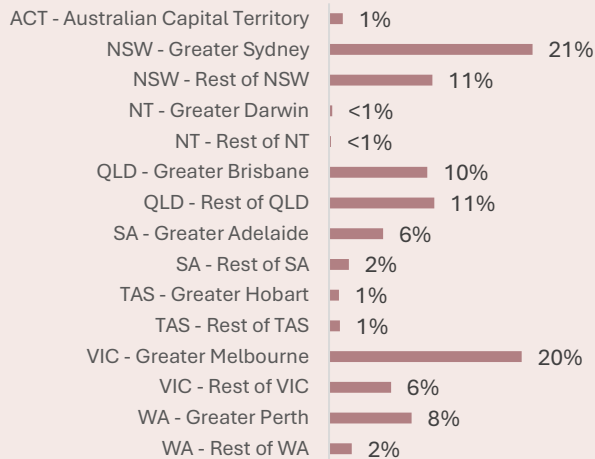
## Q1. How old are you?

Base: All respondents, n = 1,000. Results are provided unweighted.



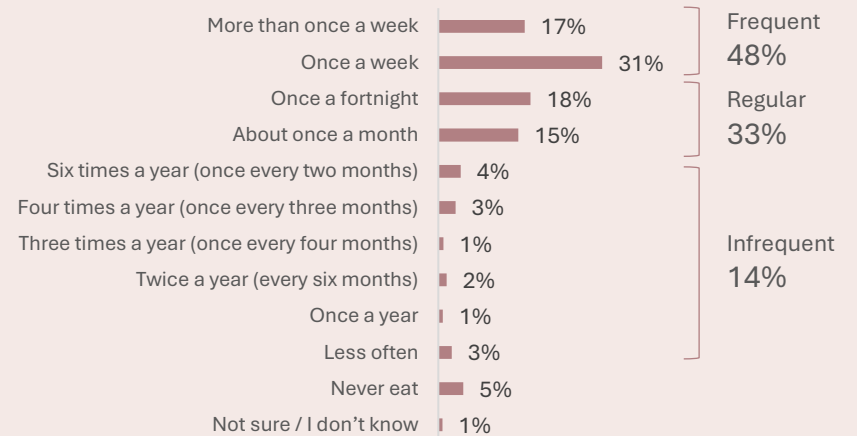
## Q3. Where do you currently live?

Base: All respondents, n = 1,000. Results are provided unweighted.



## Q4. Over the past 12 months, how often would you say that you have eaten fresh, frozen or tinned fish or seafood for a main meal?

Base: All respondents, n = 1,000. Results are provided unweighted.





# Important factors when considering to buy seafood

Q5. There are different things important to people when they consider buying seafood. How important are each of the following factors for you?

Base: All respondents, n = 1,000



# Confidence intervals for survey estimates

## Reliability of the estimates

The estimates in this report are based on information obtained from a sample survey. Any data collection may encounter factors, known as non-sampling error, which can impact on the reliability of the resulting statistics. In addition, the reliability of estimates based on sample surveys are also subject to sampling variability. That is, the estimates may differ from those that would have been produced had all persons in the population been included in the survey.

## Non-sampling error

Non-sampling error may occur in any collection, whether it is based on a sample or a full count such as a census. Sources of non-sampling error include non-response, errors in reporting by respondents or recording of answers by interviewers and errors in coding and processing data. Every effort is made to reduce non-sampling error by careful design of survey questionnaires and quality control procedures at all stages of data processing.

## Sampling error

One measure of the likely difference is given by the standard error (SE), which indicates the extent to which an estimate might have varied by chance because only a sample of persons was included. There are about two chances in three (67%) that a sample estimate will differ by less than one SE from the number that would have been obtained if all persons had been surveyed, and about 19 chances in 20 (95%) that the difference will be less than two SEs.

## Calculation of confidence interval

If 50% of all the people in a population of 20,000 people drink coffee in the morning, and if you were repeat the survey of 377 people ("Did you drink coffee this morning?") many times, then 95% of the time, your survey would find that between 45% and 55% of the people in your sample answered "Yes".

The remaining 5% of the time, or for 1 in 20 survey questions, you would expect the survey response to more than the margin of error away from the true answer.

When you survey a sample of the population, you don't know that you've found the correct answer, but you do know that there's a 95% chance that you're within the margin of error of the correct answer.

In terms of the numbers selected above, the margin of error *MoE* is given by:


$$MoE = z * \sqrt{\frac{\hat{p}(1-\hat{p})}{n}}$$

where *n* is the sample size,  $\hat{p}$  is the fraction of responses that you are interested in, and *z* is the [critical value](#) for the 95% confidence level (in this case, 1.96).

This calculation is based on the [Normal distribution](#) and assumes you have more than about 30 samples.

Margin of Error for a given sample size and survey estimate	Survey Estimate								
	10%	20%	30%	40%	50%	60%	70%	80%	90%
Sample Size: n = 1,000 (total surveys completed)	± 1.86%	± 2.48%	± 2.84%	± 3.04%	± 3.10%	± 3.04%	± 2.84%	± 2.48%	± 1.86%

Note. Margin of Errors are provided at the 95% confidence level on the assumption of a large population size (non-finite) and normally distributed. Results labelled "n/a" are due to the assumption of the normal distribution not being upheld ( $n\hat{p} < 10$  or  $n(1-\hat{p}) < 10$ ).



# Research design

**Objectives** The Community Sentiment Survey, undertaken by FRDC in conjunction with key industry stakeholders, has been designed to help FRDC and industry understand community awareness and knowledge of Australian fisheries and marine parks and provide a measure of their support for and engagement with commercial fishers operating in these two designated areas.

**Methodology** The Community Sentiment Survey used an online survey methodology.

**Sample lists** The sample frame for this survey was sourced via an accredited market research panel. The panel provides a cross-section of Australians – from all states and territories, ages and gender.

**Questionnaire** A 7-minute questionnaire was used to collect the required information. The survey questionnaire covered, amongst others, the following topic areas:

- Awareness of fisheries and marine parks
- Awareness that commercial operators operate in these areas
- Support for commercial operators to continue operating in marine parks
- Impact of purchase preferences if species sourced from a marine park
- Willing to recommend species sourced from a marine park to family and friends

**Sample size** A total of n = 1,000 responses were collected.

**Timing** Data collection was undertaken between 10<sup>th</sup> May – 14<sup>th</sup> May 2024.

**Weighting** The survey results were weighted by gender (2 cells) and age group (6 cells) using the latest available population data from the Australian Bureau of Statistics (<https://www.abs.gov.au/statistics/people/population/national-state-and-territory-population/latest-release>). Those who indicated their gender identity was non-binary (n = 2) or prefer not to say (n = 1) were assigned a unit weight of 1.



# COMMUNITY SENTIMENT SURVEY

This survey was conducted by Intuitive Solutions on behalf of Austral Fisheries and FRDC. For more information, please contact:



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[www.intuitivesolutions.com.au](http://www.intuitivesolutions.com.au)