

# 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.

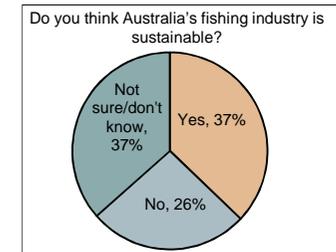
Perhaps not surprisingly, people who fish regularly and eat seafood regularly were more likely to believe the industry was sustainable. However the level of support even amongst these arguably advocate groups suggests further work is required to strengthen perception around sustainability.

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

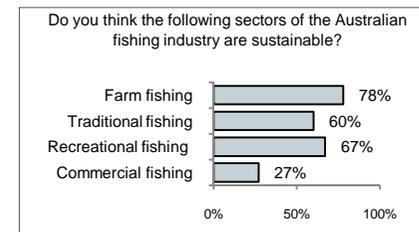
The results were also reported across the different sectors of the industry. As can be seen from the figures opposite:

- 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.

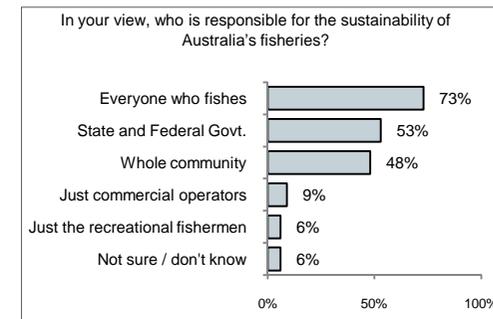
## where is the balance between environment and supply pressures?

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.

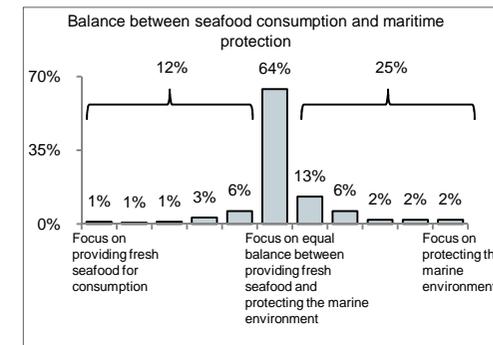
While this provides some licence for both protecting marine areas and at the same time ensuring recreational and commercial fishing is catered for there is likely to be a delicate balance – in some respects a discussion of one cannot be held without reference to the other.

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

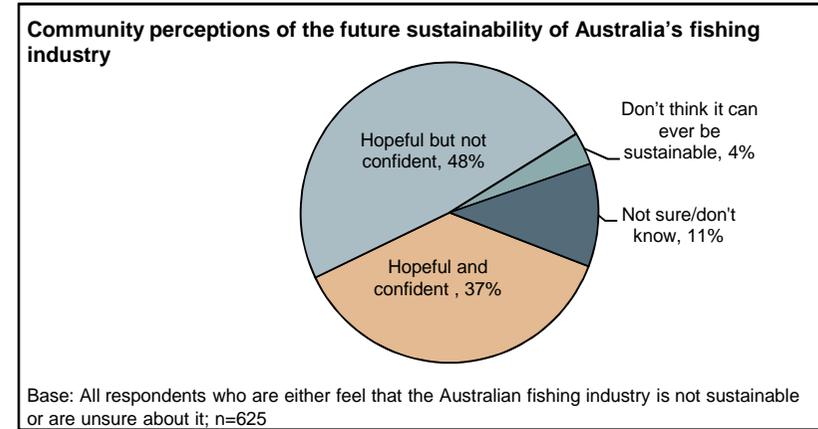
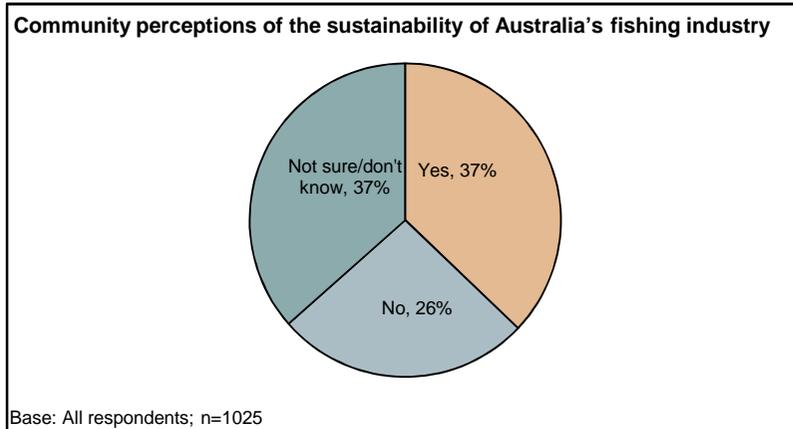
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community perceptions of the sustainability of  
Australia's fishing industry

# 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.

### What we asked:

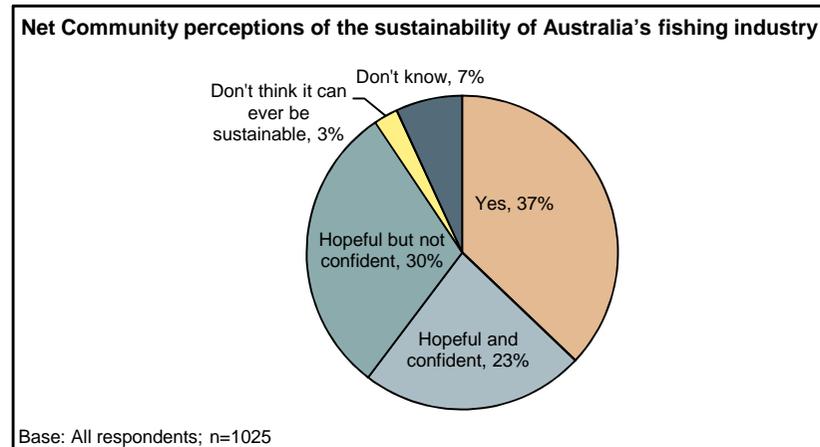
Do you think Australia's fishing industry is **sustainable**? That is, does the industry have the necessary practices and policies in place that ensure the future of fish species and the marine environment while at the same time providing sufficient supply of fish for commercial and recreational fishing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

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

|  | 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%                      |

# 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%                     |

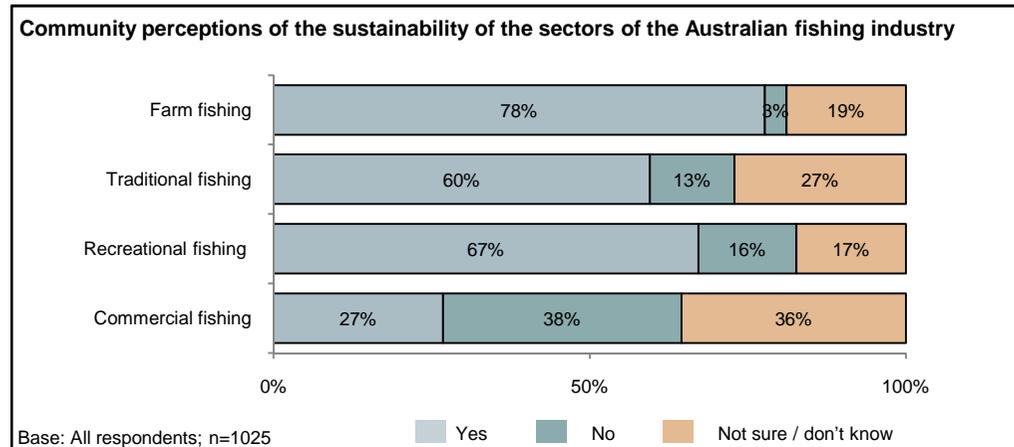
|  | Frequent fishers | Regular fishers | Occasional / non fishers |
|--|------------------|-----------------|--------------------------|
| n                                      | 194              | 255             | 576                      |
| Is sustainable                         | 57%              | 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%                     |

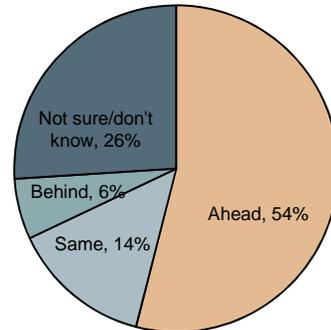
|                      | Frequent fishers | Regular fishers | Occasional / non fishers |
|----------------------|------------------|-----------------|--------------------------|
| n                    | 194              | 255             | 576                      |
| Farm fishing         | 79%              | 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?

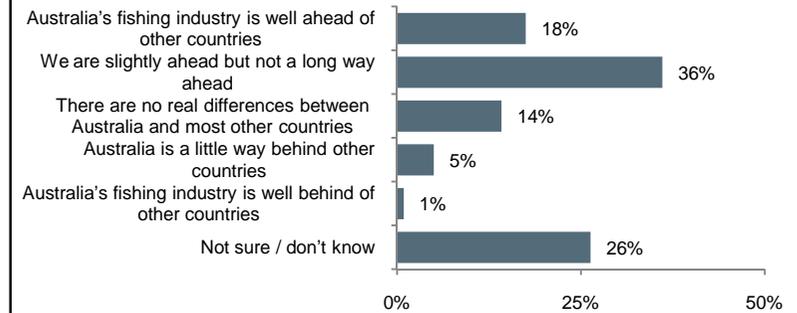
# community perceptions of the sustainability of Australia's fishing industry

**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%                      |

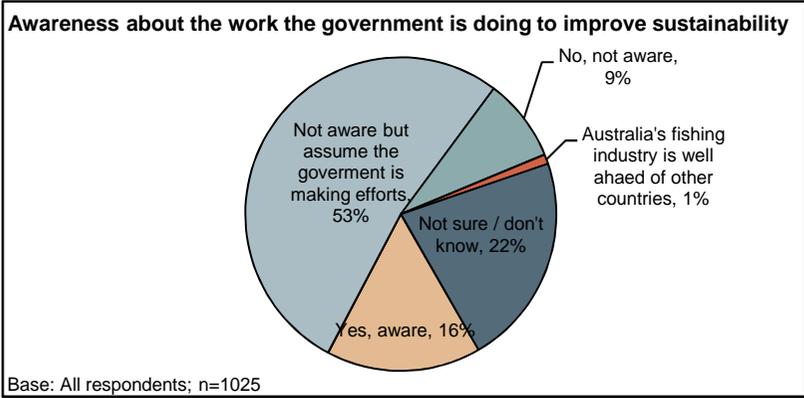
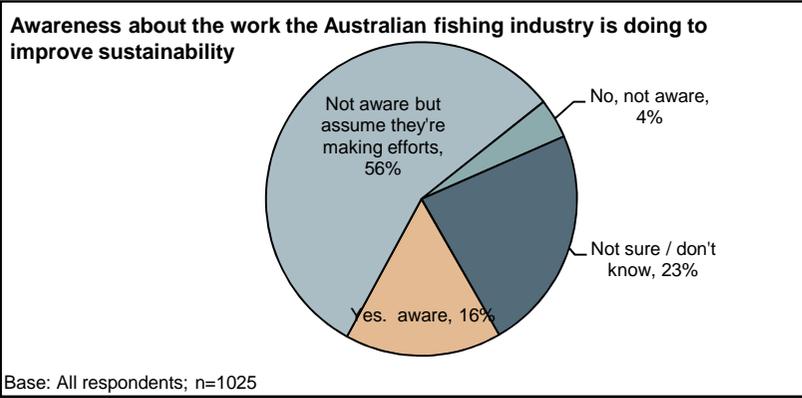
**What we asked:**

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%                     |

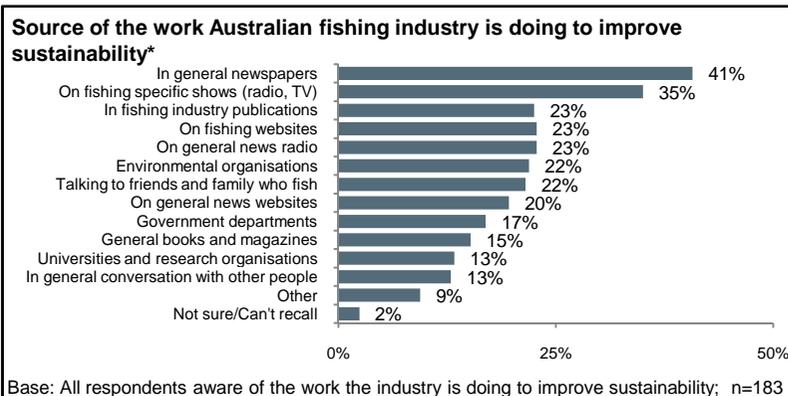
|  | Frequent eaters | Regular eaters | Occasional / non eaters |
|--|-----------------|----------------|-------------------------|
| n  | 611             | 310            | 100                     |
| Yes, aware   | 20%             | 13%            | 7%                      |
| No, not aware but assume 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%                      |

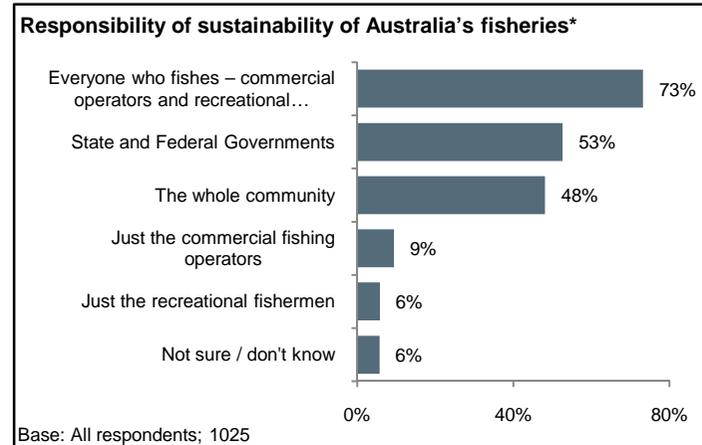
|  | Frequent eaters | Regular eaters | Occasional / non eaters |
|--|-----------------|----------------|-------------------------|
| n                                      | 56              | 52             | 75                      |
| In general newspapers                  | 28%             | 58%            | 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.

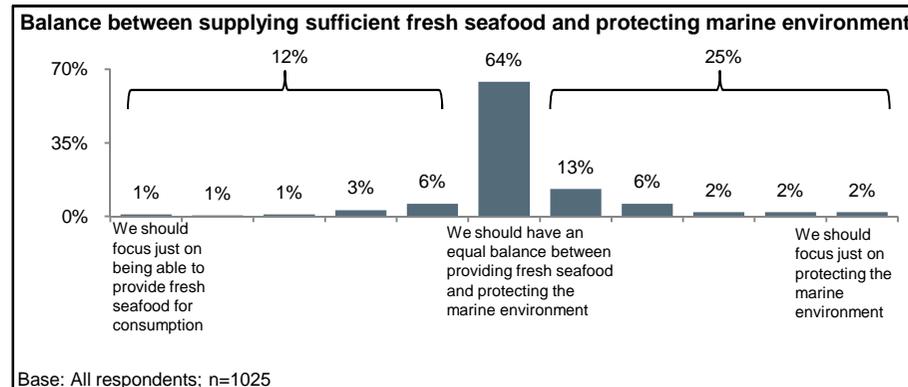
*What we asked:*

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



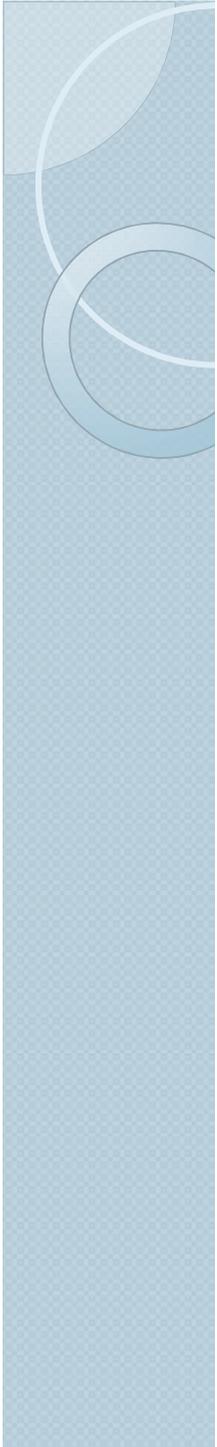
## Segmentation tables

|   | 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:

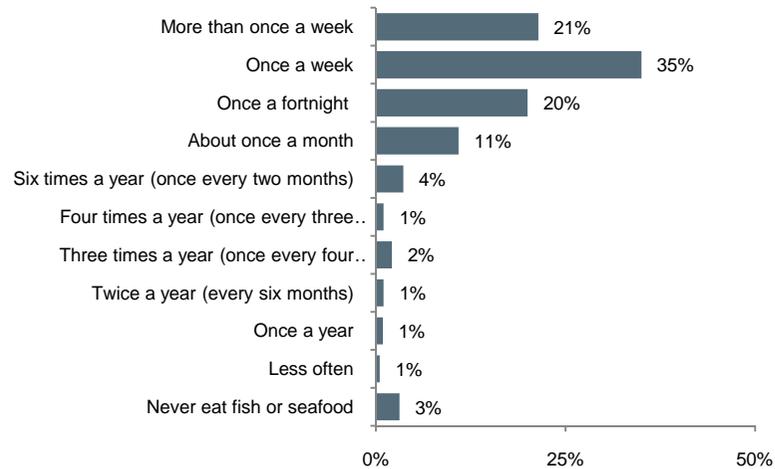
Most Australians acknowledge that its important to have a fishing industry that can supply sufficient fresh seafood so that everyone can buy locally caught seafood for consumption while at the same time having policies and practices that protect the marine environment. In your opinion how would you describe 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

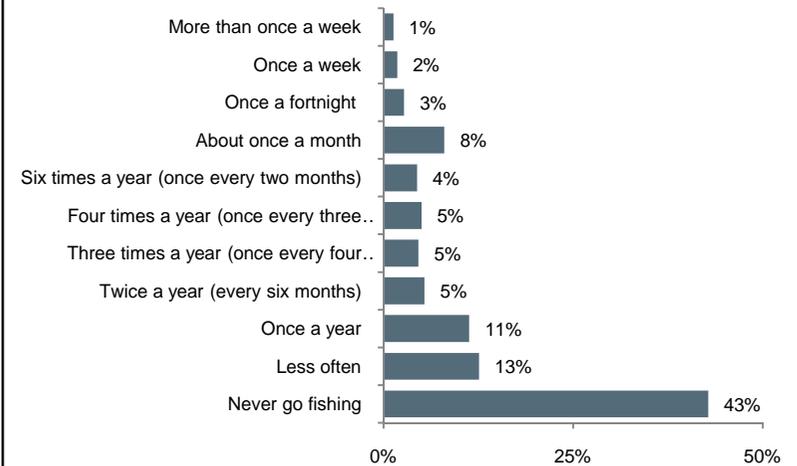
## about the respondents

### Seafood for consumption



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

### Frequency of going fishing



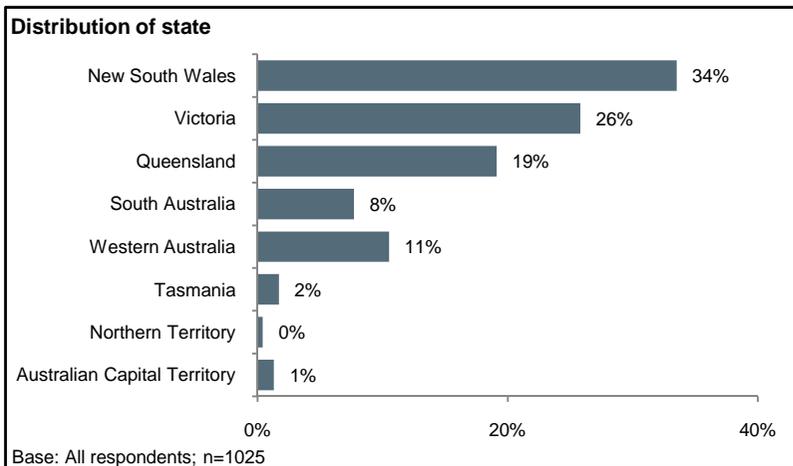
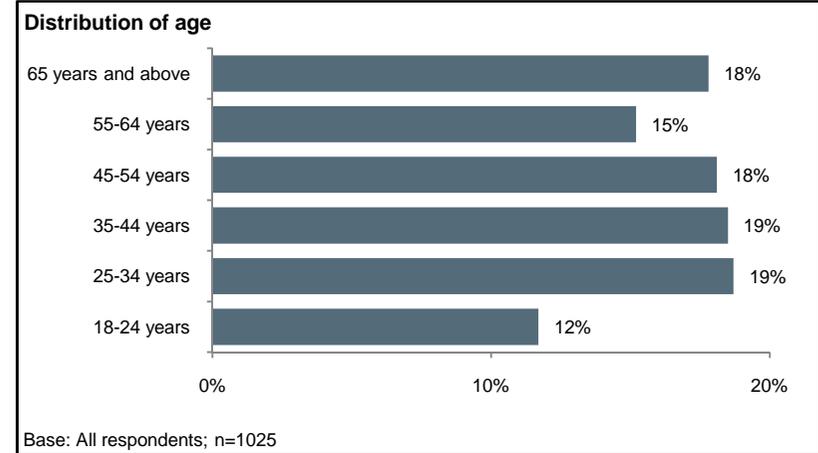
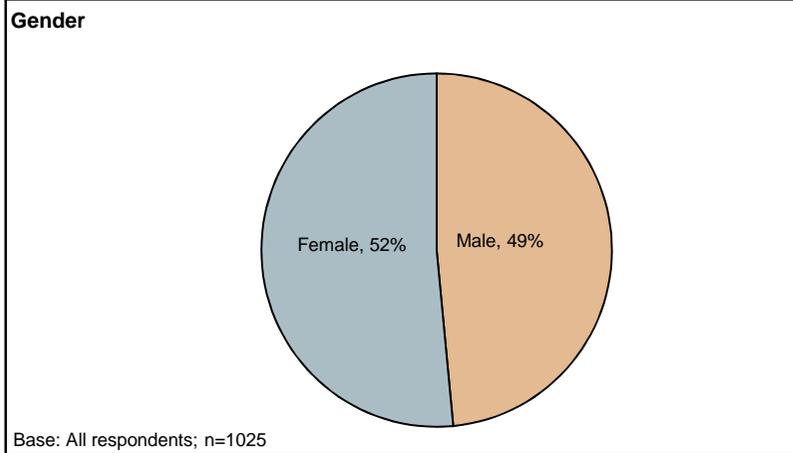
Base: All respondents; n=1025

#### What we asked:

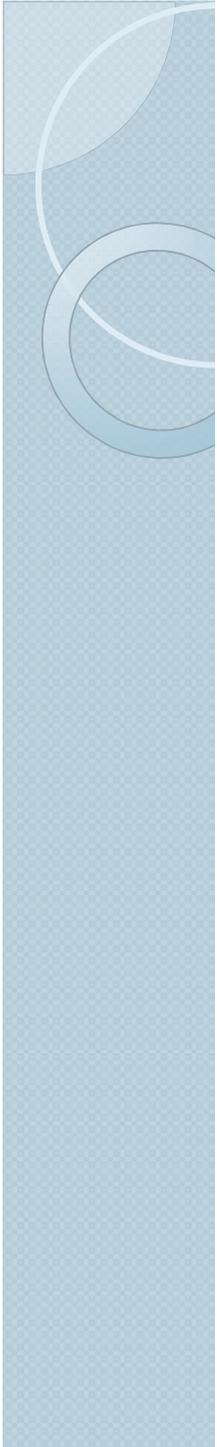
Over the past 12 months, how often would you say that you eat fish or seafood for a main meal?

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 30<sup>th</sup> June 2010 (*Source: Australian Bureau of Statistics*). The data was weighted on the following variables:

- Age
- Gender
- 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?