Community perceptions of the sustainability of the fishing industry in Australia

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Our reference: P4587

intuitive solutions

management summary

research context

Sustainability remains an ongoing challenge and key area of focus for the Australian fishing industry. All sectors, including both industry and Government, continue to invest time and resources into improving the sustainability of the industry. In parallel, efforts are directed at ensuring the broader Australian community is informed about and engaged with industry's progress (in regards achieving sustainability). The level of awareness and engagement remains one important 'marker' of success for the industry.

In 2011 and again this year research has been undertaken 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 community perceptions.

The 2013 research was conducted in late August 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".*

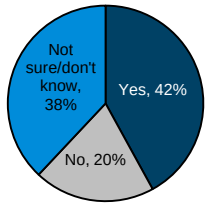
The results from the 2013 research indicate that the views of the Australian community continue to be somewhat fragmented with:

- just over four in ten (42%) believing the industry was sustainable;
- one in five (20%) believing the industry was not sustainable; while
- the remaining 38% just not sure if the industry was sustainable or not.

Pleasingly however the proportion of Australians who believe the industry is sustainable has increased since 2011 (up 5% from 37%); this is a statistically significant increase and indicates opinions are changing albeit slowly.

Among those who were uncertain or dismissive that the industry was currently sustainable (58%), there is a clear sense of pessimism with more than half (52% of these people) not confident the industry will become sustainable.

Do you think Australia's fishing industry is sustainable?



	2011
Yes	37%
No	26%
Not sure	37%

Base: All respondents; n=1021

Frequency of seafood consumption	Australia's fishing industry is sustainable % agree%	Aware of the work Australia's fishing industry is doing % agree	Aware of the work the Government is doing % agree
Frequent eaters	44%	24%	18%
Regular eaters	46%	17%	14%
Occasional / non eaters	28%	12%	7%
Frequency of going fishing			
Frequent fishers	61%	33%	27%
Regular fishers	41%	19%	10%
Occasional / non fishers	35%	15%	13%

perceptions vary across the community

As noted in the 2011 study, people who fish regularly and/or 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.

management summary

While some improvements have been evident there remains an ongoing challenge to continue to 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:

- There is a stronger level of confidence across the community about the sustainability of aquaculture (76%, down 2% from 2011) and recreational fishing (69% up 2% from 2011); whereas
- While perceptions continue to be weaker in regards community perceptions for commercial fishing (just 30% believing it's sustainable, up 3% from 2011) the improvement is a positive one.
- These results and indeed looking back to an earlier FRDC study (2003) indicate that progress in changing community perceptions is itself a long term project. It is also likely to be one that will require ongoing effort, communication and engagement.

Sustainability of fishing sectors	2013 (% agree)	2011 (% agree)
Farm fishing	76%	78%
Traditional fishing	58%	60%
Recreational fishing	69%	67%
Commercial fishing	30%	27%

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.

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

While the overall results indicate that visibility of the efforts undertaken by Government and industry remains low, the results from the 2013 research are instructive.

- When asked just 15% of people reported they were aware of the efforts being undertaken by Government; whereas
- One in five people (20% up 4% from 2011) reported they were aware of the efforts being undertaken by industry.

So while the overall awareness results points to the need for a continued focus on driving community awareness of the efforts being made, the result suggest there has been a limited but positive response and acknowledgement of the efforts undertaken by industry in this regard. This should provide encouragement for continued investment in and engagement with the community in 'telling the story' of the journey to sustainability.

On a more positive note the majority of adult Australians assume industry (58% up 2%) and Government (52%, down 1%) 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.

Awareness of work to improve	2013 (% aware)	2011 (% aware)
Fishing industry	20%	16%
Government	15%	16%

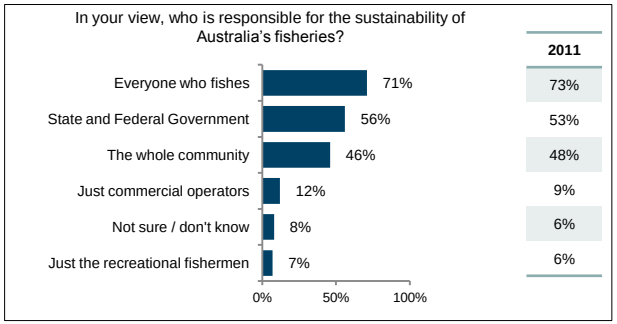
by comparison to other countries

More than one in two adult Australians (56%) believe the Australian fishing industry is ahead of other countries in regards sustainability (17% reporting Australia was well ahead and 39% slightly ahead). There has been little change in this sentiment since the 2011 study. Given the high level of uncertainly 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?

Australians continue to hold the view that achieving sustainability is a shared responsibility.

The results again support the position that suggests 'industry' as a collective (everyone who fishes) is the predominant 'custodian' for sustainability. 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.

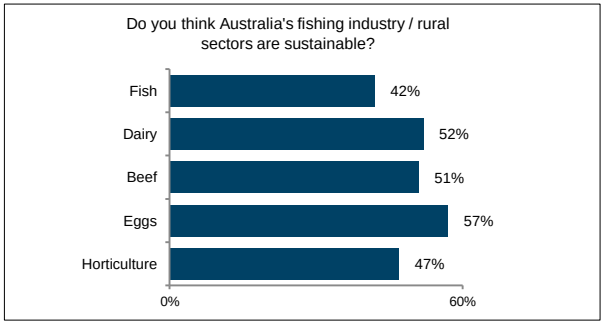


Base: All respondents; n=1021

how does the fishing industry compare to other sectors?

Australians hold different views of the sustainability of different sectors.

The results as shown in the chart opposite, provide an indication that there are different perceptions of the sustainability of various rural sectors. Interestingly perceptions of the fishing industry are lower than that of other sectors most notably eggs, dairy and beef. It may well be the recent intense focus on the egg industry in particular has created a higher visibility for this sector than others.



Base: All respondents; n=1021

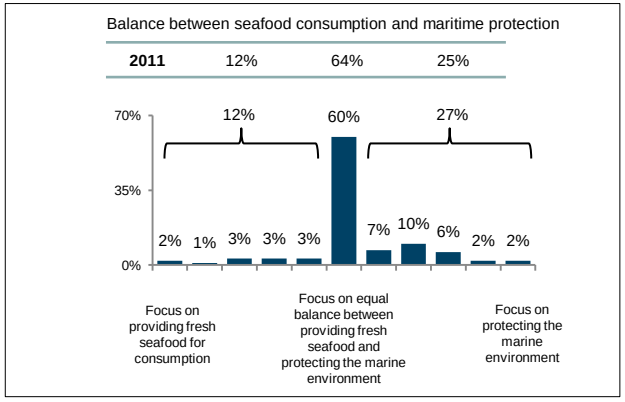
where is the balance between environment and supply pressures?

As in 2011 a measure of the balance between supply and the environment was undertaken. The results from this study suggest the majority of Australians (60%, down 4% from 2011) continue to 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.

We would note a slight (but not significant) shift in community views towards protecting the marine environment. Despite this small realignment the results remain largely consistent with the 2011 study. As noted then, 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.

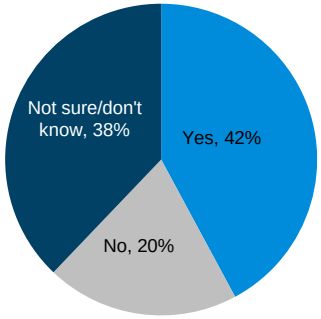


contents

community perceptions of the sustainability of Australia's fishing industry

community perceptions of the sustainability of Australia's fishing industry

Is Australia's fishing industry sustainable?



Base: All respondents; n=1021

	2013	2011	95% CI
n	1021	1025	
Yes †	42%	37%	(39.1%,45.1%)
No †	20%	26%	(17.5%,22.5%)
Not sure/don't know	38%	37%	(34.9%,40.9%)

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
Yes	44%	46%	28%
No	21%	17%	25%
Not sure/don't know	36%	37%	47%

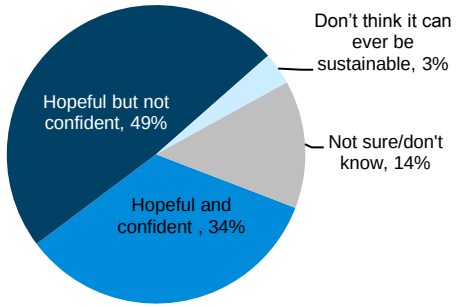
	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Yes	61%	41%	35%
No	17%	27%	18%
Not sure/don't know	22%	32%	47%

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?

community perceptions of the sustainability of Australia's fishing industry

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



Base: All respondents who are either feel that the Australian fishing industry is not sustainable or are unsure about it; n=613

	2013	2011	95% CI
n	613	625	
Hopeful and confident	34%	37%	(30.2%,37.6%)
Hopeful but not confident	49%	48%	(44.8%,52.8%)
Don't think it can ever be sustainable	3%	4%	(2.0%,5.0%)
Not sure/don't know	14%	11%	(11.1%,16.5%)

Segment results

	Frequent eaters	Regular eaters	Occasional / non eaters
n	266	209	133
Hopeful and confident	39%	29%	28%
Hopeful but not confident	50%	50%	43%
Don't think it can ever be sustainable	4%	4%	2%
Not sure/don't know	7%	17%	26%

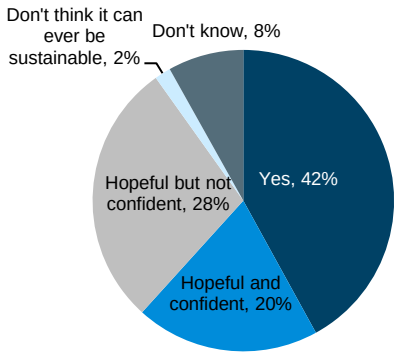
	Frequent fishers	Regular fishers	Occasional / non fishers
n	92	151	370
Hopeful and confident	34%	36%	33%
Hopeful but not confident	56%	56%	44%
Don't think it can ever be sustainable	5%	2%	4%
Not sure/don't know	5%	5%	20%

What we asked:

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

community perceptions of the sustainability of Australia's fishing industry

Is Australia's fishing industry sustainable, or can it be sustainable?



Base: All respondents; n=1021

	2013	2011
n	1021	1025
Yes †	42%	37%
Hopeful and confident	20%	23%
Hopeful but not confident	28%	30%
Don't think it can ever be sustainable	2%	3%
Not sure/don't know	8%	7%

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
Is sustainable	44%	46%	28%
Hopeful and confident	22%	16%	20%
Hopeful but not confident	28%	27%	31%
Don't think it can ever be sustainable	2%	2%	1%
Not sure/don't know	4%	9%	19%

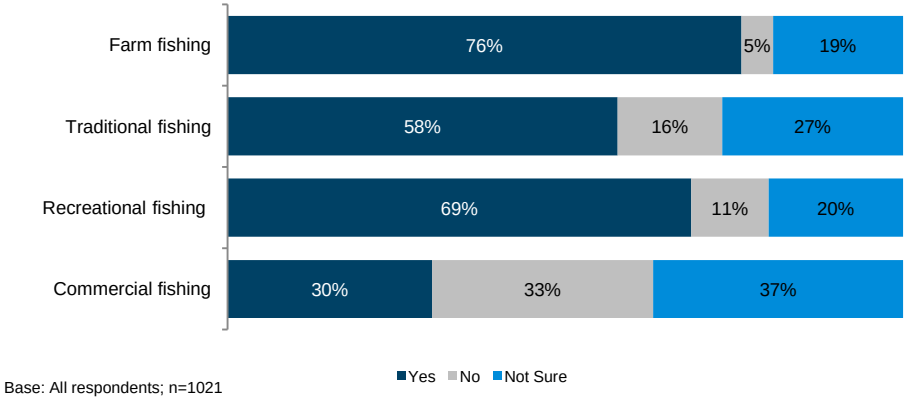
	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Is sustainable	61%	41%	35%
Hopeful and confident	13%	21%	21%
Hopeful but not confident	22%	33%	29%
Don't think it can ever be sustainable	2%	1%	3%
Not sure/don't know	2%	3%	13%

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?

Is the following sectors of the Australian fishing industry sustainable?



Base: All respondents; n=1021

% agreeing with the sustainability of sectors	2013	2011	95% CI
n	1021	1025	
Farm fishing	76%	78%	(73.5%,78.7%)
Traditional fishing	58%	60%	(54.7%,60.7%)
Recreational fishing	69%	67%	(65.8%,71.4%)
Commercial fishing †	30%	27%	(27.5%,33.1%)

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

% agreeing with the sustainability of sectors

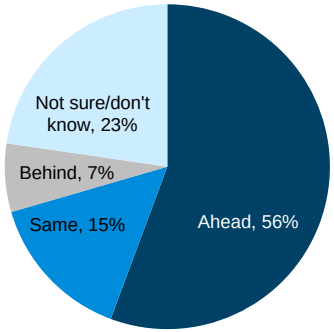
	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
Farm fishing	80%	75%	68%
Traditional fishing	57%	61%	53%
Recreational fishing	68%	75%	58%
Commercial fishing	33%	28%	27%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Farm fishing	77%	81%	74%
Traditional fishing	58%	58%	58%
Recreational fishing	74%	75%	64%
Commercial fishing	43%	26%	27%

What we asked:

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

Comparison of Australia's fishing industry's practices around sustainability to those overseas



Base: All respondents; n=1021

Comparison of practices followed by Australian fishing industry to those overseas	2013	2011	95% CI
n	1021	1025	
Australia's fishing industry is well ahead of other countries	17%	18%	(14.2%,18.8%)
We are slightly ahead but not a long way ahead	39%	36%	(36.1%,42.1%)
There are no real differences between Australia and most other countries	15%	14%	(12.6%,17.0%)
Australia is a little way behind other countries	5%	5%	(3.9%,6.7%)
Australia's fishing industry is well behind of other countries	2%	1%	(.8%,2.2%)
Not sure / don't know †	23%	26%	(20.1%,25.3%)

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
Australia's fishing industry is well ahead of other countries	21%	16%	4%
We are slightly ahead but not a long way ahead	40%	38%	39%
There are no real differences between Australia and most other countries	15%	14%	15%
Australia is a little way behind other countries	6%	4%	6%
Australia's fishing industry is well behind of other countries	1%	2%	2%
Not sure / don't know	17%	26%	35%

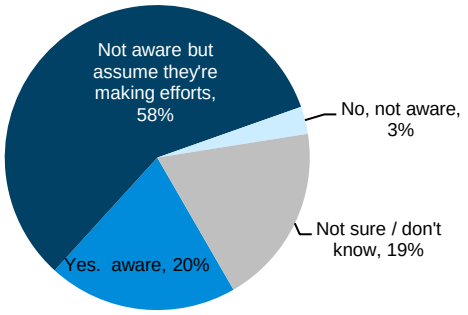
	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Australia's fishing industry is well ahead of other countries	21%	15%	15%
We are slightly ahead but not a long way ahead	46%	43%	35%
There are no real differences between Australia and most other countries	19%	10%	16%
Australia is a little way behind other countries	6%	6%	5%
Australia's fishing industry is well behind of other countries	<1%	4%	1%
Not sure / don't know	8%	23%	29%

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

Awareness of the work Australia's fishing industry is doing to improve sustainability



Base: All respondents; n=1021

	2013	2011	95% CI
n	1021	1025	
Yes, aware †	20%	16%	(17.6%,22.6%)
No, not aware but assume they are making efforts	58%	56%	(54.8%,60.8%)
Not, not aware	3%	4%	(1.9%,3.9%)
Not sure / don't know †	19%	23%	(16.8%,21.6%)

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

	Frequent eaters	Regular eaters	Occasional / Non eaters
n	487	347	182
Yes, aware	24%	17%	12%
No, not aware but assume they are making efforts	58%	61%	51%
Not, not aware	3%	2%	4%
Not sure / don't know	15%	20%	33%

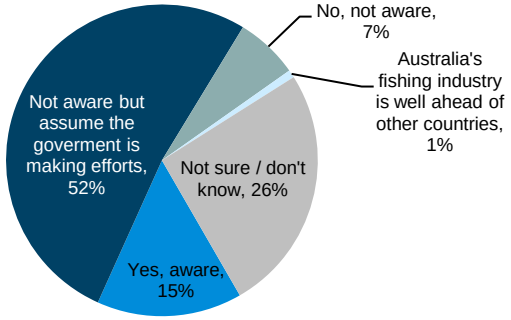
	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Yes, aware	33%	19%	15%
No, not aware but assume they are making efforts	53%	69%	55%
Not, not aware	4%	<1%	4%
Not sure / don't know	10%	11%	26%

What we asked:

Do you know if the fishing industry is doing work to improve its level of sustainability?

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

Awareness of the work the government is doing to improve sustainability



Base: All respondents; n=1021

	2013	2011	95% CI
n	1021	1025	
Yes, aware	15%	16%	(12.9%,17.3%)
No, not aware but assume they are making efforts	52%	53%	(48.9%,55.1%)
Not, not aware †	7%	9%	(5.0%,8.0%)
Australia's fishing industry is ahead of other countries	1%	1%	(.3%,1.3%)
Not sure / don't know †	26%	22%	(22.9%,28.3%)

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

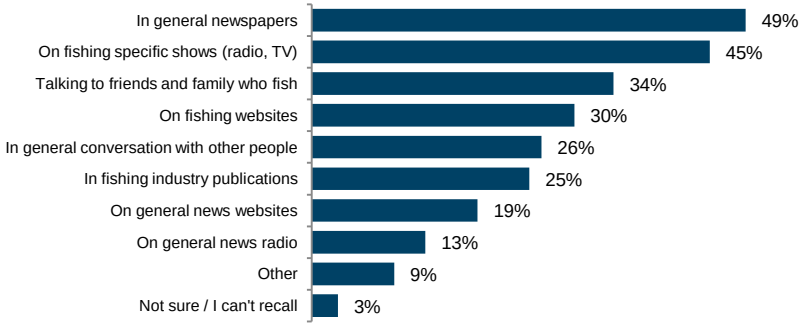
	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
Yes, aware	18%	14%	7%
No, not aware but assume they are making efforts	55%	53%	37%
Not, not aware	6%	7%	8%
Australia's fishing industry is ahead of other countries	1%	<1%	0%
Not sure / don't know	20%	25%	49%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Yes, aware	27%	10%	13%
No, not aware but assume they are making efforts	50%	65%	47%
Not, not aware	6%	7%	7%
Australia's fishing industry is ahead of other countries	2%	0%	1%
Not sure / don't know	16%	19%	33%

What we asked:
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

Source they used to become aware of the work Australia's fishing industry is doing to improve sustainability*



Base: All respondents aware of the work the industry is doing to improve sustainability; n=187

Source they used to become aware	2013	2011	95% CI
n	187	183	
In general newspapers	49%	41%	(41.9%,56.3%)
On fishing specific shows (radio, TV) †	45%	35%	(38.0%,52.2%)
Taking to friends and family who fish †	34%	22%	(27.4%,41.0%)
On fishing websites	30%	23%	(23.2%,36.2%)
In general conversation with other people †	26%	13%	(19.7%,32.3%)
In fishing industry publications	25%	23%	(18.4%,30.8%)
On general news websites	19%	20%	(13.2%,24.4%)
On general news radio †	13%	23%	(8.1%,17.7%)
Other	9%	9%	(5.1%,13.5%)
Not sure / I can't recall	3%	2%	(.6%,5.4%)

* Multiple response question. Percentages may add to more than 100%.

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

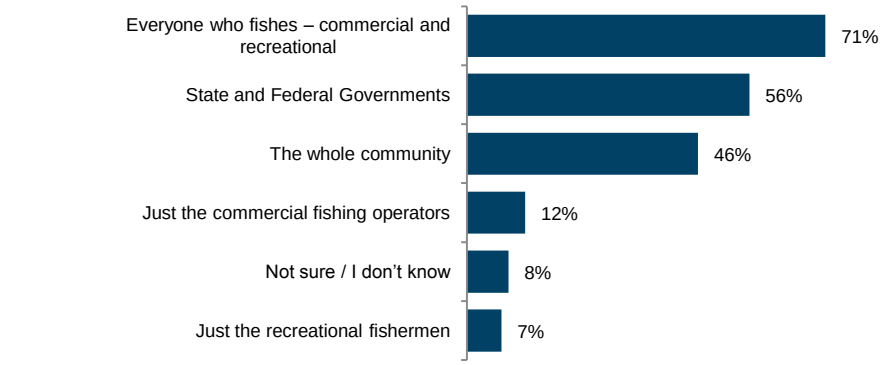
	Frequent eaters	Regular eaters	Occasional / non eaters
n	114	51	22
In general newspapers	53%	49%	20%
On fishing specific shows (radio, TV)	48%	39%	42%
Talking to friends and family who fish	33%	39%	29%
On fishing websites	27%	43%	7%
In general conversation with other people	29%	22%	18%
In fishing industry publications	28%	21%	9%
On general news websites	20%	16%	16%
On general news radio	13%	10%	18%
Other	10%	3%	22%
Not sure / I can't recall	4%	0%	4%

	Frequent eaters	Regular eaters	Occasional / non eaters
n	82	47	58
In general newspapers	45%	41%	58%
On fishing specific shows (radio, TV)	45%	45%	45%
Talking to friends and family who fish	34%	38%	32%
On fishing websites	43%	27%	18%
In general conversation with other people	19%	37%	27%
In fishing industry publications	33%	17%	21%
On general news websites	21%	13%	20%
On general news radio	15%	18%	8%
Other	7%	11%	10%
Not sure / I can't recall	7%	0%	1%

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

Who is responsible for the sustainability of Australia's fisheries*



Base: All respondents; n=1021

Responsibility for the sustainability	2013	2011	95% CI
n	1021	1025	
Everyone who fishes – commercial and recreational	71%	73%	(68.4%,74.0%)
State and Federal Governments	56%	53%	(53.1%,59.1%)
The whole community	46%	48%	(42.8%,49.0%)
Just the commercial fishing operators	12%	9%	(9.5%,13.5%)
Not sure / I don't' know	8%	6%	(6.5%,9.9%)
Just the recreational fisherman †	7%	6%	(5.3%,8.5%)

* Multiple response question. Percentages may add to more than 100%.

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

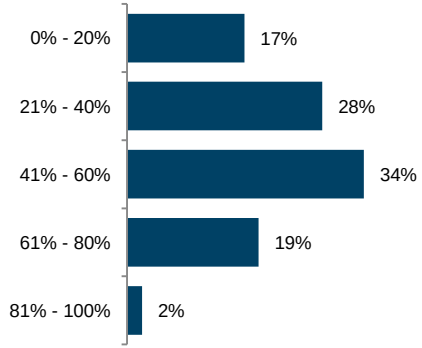
	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
Everyone who fishes – commercial and recreational	70%	76%	68%
State and Federal Governments	54%	60%	57%
The whole community	47%	44%	47%
Just the commercial fishing operators	12%	12%	9%
Not sure / I don't know	6%	7%	17%
Just the recreational fishermen	6%	9%	5%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Everyone who fishes – commercial and recreational	77%	74%	68%
State and Federal Governments	57%	56%	56%
The whole community	41%	49%	47%
Just the commercial fishing operators	17%	11%	9%
Not sure / I don't know	3%	3%	13%
Just the recreational fishermen	10%	7%	6%

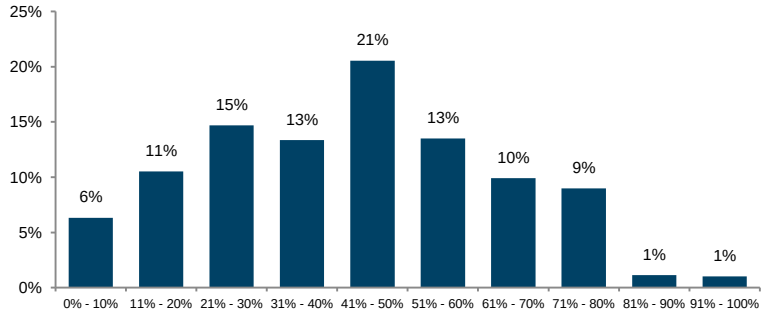
What we asked:
In your view, who is responsible for the sustainability of Australia's fisheries?

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

Perception of the percentage of fish consumed by Australians grown and caught in Australia



	2013
n	1021
Mean	46%
Median	50%



Base: All respondents; n=1021

Segment results

	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
0% - 20%	14%	20%	20%
21% - 40%	30%	24%	29%
41% - 60%	37%	31%	28%
61% - 80%	17%	22%	20%
81% - 100%	1%	3%	3%
Mean	46%	47%	45%
Median	50%	50%	50%

	Frequent fishers	Regular fishers	Occasional / non fishers
n	487	347	182
0% - 20%	20%	17%	15%
21% - 40%	33%	34%	23%
41% - 60%	28%	30%	38%
61% - 80%	17%	17%	21%
81% - 100%	1%	2%	2%
Mean	43%	44%	48%
Median	40%	40%	50%

What we asked:

From what you know or have seen, heard or read, what percentage of the fish consumed by Australians is actually grown and caught in Australia, that is not imported from overseas?

a snapshot across different community segments

a snapshot across different community segments

The following analysis examines some of the key results across the fishing and seafood consumption segments identified earlier in this report.

Frequency of seafood consumption	Australia's fishing industry is sustainable	Aware of the work Australia's fishing industry is doing	Aware of the work the Government is doing	Farm fishing is sustainable	Traditional fishing is sustainable	Recreational fishing is sustainable	Commercial fishing is sustainable
	% agree%	% agree	% agree	% agree	% agree	% agree	% agree
Frequent eaters	44%	24%	18%	80%	57%	68%	33%
Regular eaters	46%	17%	14%	75%	61%	75%	28%
Occasional / non eaters	28%	12%	7%	68%	53%	58%	27%

Frequency of going fishing	Australia's fishing industry is sustainable	Aware of the work Australia's fishing industry is doing	Aware of the work the Government is doing	Farm fishing is sustainable	Traditional fishing is sustainable	Recreational fishing is sustainable	Commercial fishing is sustainable
	% agree%	% agree	% agree	% agree	% agree	% agree	% agree
Frequent fishers	61%	33%	27%	77%	58%	74%	43%
Regular fishers	41%	19%	10%	81%	58%	75%	26%
Occasional / non fishers	35%	15%	13%	74%	58%	64%	27%

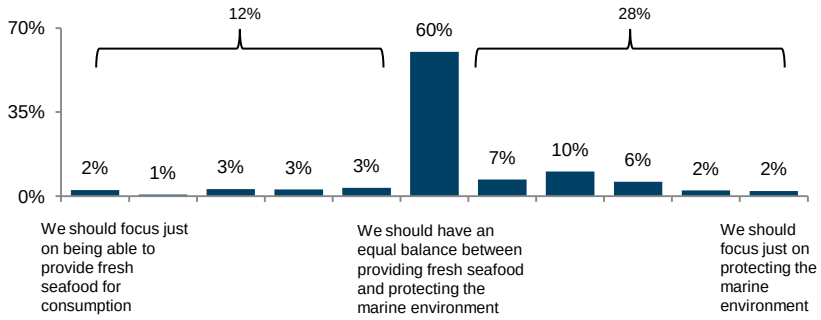
What we asked:

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

balance between seafood for consumption & maritime protection

balance between seafood for consumption & maritime protection

Balance between supplying sufficient fresh seafood and protecting marine environment



Base: All respondents; n=1021

Balance between supplying fresh seafood and protecting the marine environment	2013	2011	95% CI
n	1021	1025	
Providing fresh seafood for consumption †	2%	1%	(1.5%,3.5%)
	1%	1%	(.2%,1.2%)
†	3%	1%	(2.0%,4.0%)
	3%	3%	(1.8%,3.8%)
†	3%	6%	(2.3%,4.5%)
Equal balance †	60%	64%	(57.0%,63.0%)
†	7%	13%	(5.3%,8.5%)
†	10%	6%	(8.4%,12.2%)
†	6%	2%	(4.5%,7.5%)
	2%	2%	(1.5%,3.3%)
Protecting the marine environment	2%	2%	(1.2%,3.0%)

† Denotes the 2013 result is statistically significant result to the 2011 result at the 0.05 level of significance.

Segment results

	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
We should focus just on being able to provide fresh seafood for consumption	4%	2%	3%
	1%	<1%	1%
	3%	4%	3%
	3%	3%	3%
	2%	5%	3%
We should have an equal balance between providing fresh seafood and protecting the marine environment	57%	62%	60%
	5%	10%	7%
	13%	7%	10%
	9%	4%	6%
	3%	2%	2%
We should focus just on protecting the marine environment	2%	2%	2%

	Frequent eaters	Regular eaters	Occasional / non eaters
n	235	262	524
We should focus just on being able to provide fresh seafood for consumption	1%	3%	3%
	1%	0%	1%
	2%	4%	3%
	4%	2%	3%
	2%	2%	5%
We should have an equal balance between providing fresh seafood and protecting the marine environment	57%	56%	63%
	6%	9%	6%
	11%	12%	9%
	10%	8%	3%
	5%	2%	2%
We should focus just on protecting the marine environment	2%	3%	2%

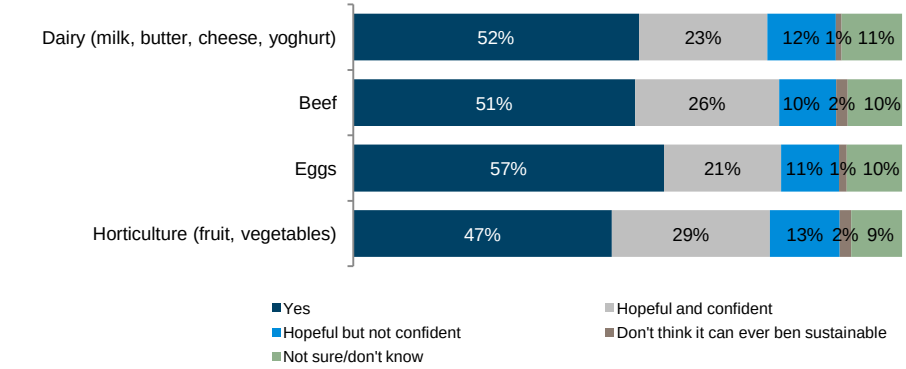
What we asked:

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.

views on sustainability of other rural sectors

views on sustainability of other rural sectors

Are other rural sectors sustainable?



Base: All respondents; n=1021

% agreeing with the sustainability of rural sectors	2013
n	1021
Dairy	52%
Beef	51%
Eggs	57%
Horticulture	47%

Segment results

% agreeing with the sustainability of sectors

	Frequent eaters	Regular eaters	Occasional / non eaters
n	487	347	182
Dairy	52%	54%	51%
Beef	53%	49%	53%
Eggs	57%	55%	60%
Horticulture	47%	51%	41%

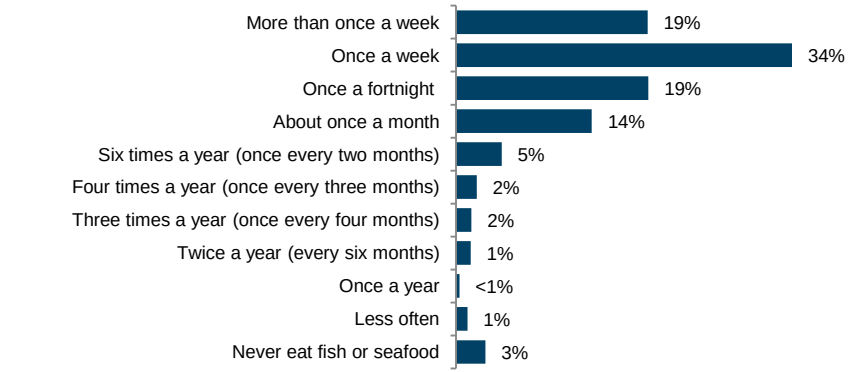
	Frequent fishers	Regular fishers	Occasional / non fishers
n	235	262	524
Dairy	52%	58%	50%
Beef	50%	52%	52%
Eggs	51%	60%	58%
Horticulture	45%	47%	48%

What we asked:

From what you know, do the following rural sectors have the necessary practices and policies in place to ensure the future of the industry and the environment is sustainable, while at the same time providing sufficient supply for Australians?

about the respondents

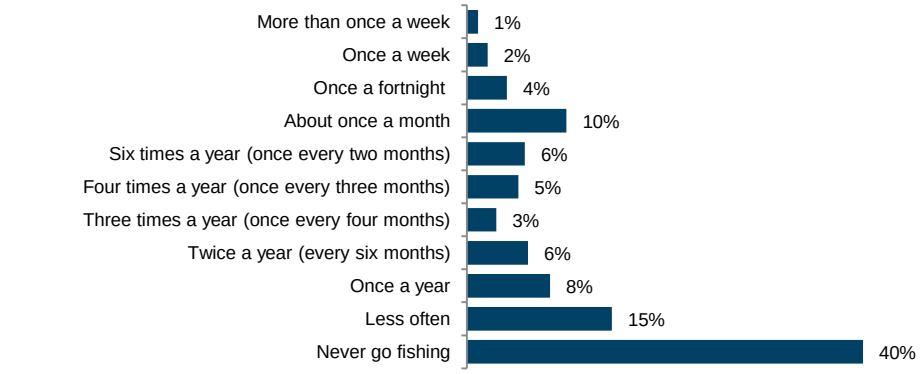
Frequency of seafood consumption



Base: All respondents (excluding 5 don't knows); n=1016

Frequency of seafood consumption	2013	2011
n	1016	1021
More than once a week	19%	21%
Once a week	34%	35%
Once a fortnight	19%	20%
About once a month	14%	11%
Six times a year	5%	4%
Four times a year	2%	1%
Three times a year	2%	2%
Twice a year	1%	1%
Once a year	<1%	1%
Less often	1%	1%
Never eat fish or seafood	3%	3%

Frequency of going fishing



Base: All respondents; n=1021

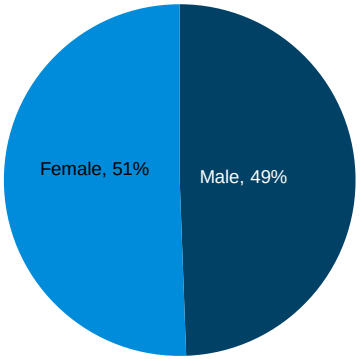
Frequency of going fi\shing	2013	2011
n	1021	1025
More than once a week	1%	1%
Once a week	2%	2%
Once a fortnight	4%	3%
About once a month	10%	8%
Six times a year	6%	4%
Four times a year	5%	5%
Three times a year	3%	5%
Twice a year	6%	5%
Once a year	8%	11%
Less often	15%	13%
Never go fishing	40%	43%

What we asked:

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

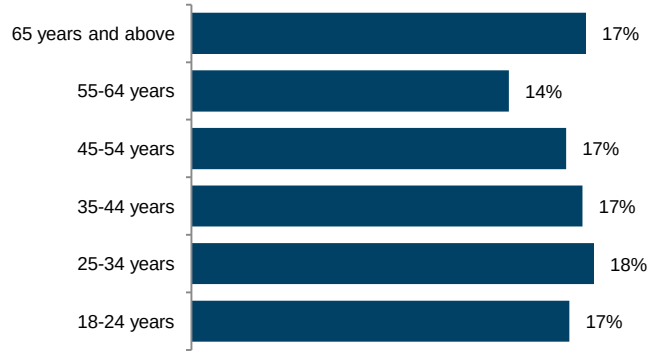
And again over the past 12 months, how often have you gone fishing? Include any occasion you have gone recreational fishing – by yourself, with friends or family or with others.

Gender



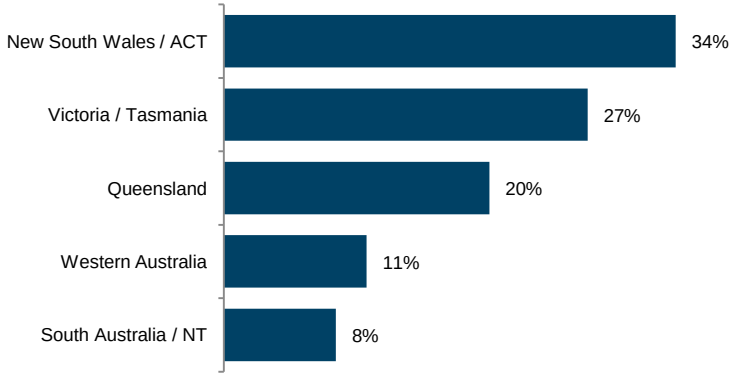
Base: All respondents; n=1021

Distribution of age



Base: All respondents; n=1021

Distribution of state



Base: All respondents; n=1021

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 a commercially available panel of respondents over the age of 18 years. The sample was based on national representative numbers and was drawn randomly.
Sample	In total, n = 1021 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 at the 30th June 2012 (*Source: 31010DO001_201303 Australian Demographic Statistics, Mar 2013. Sheet: Table_6).* The data was weighted on the following variables: ○ Age (15 – 24, 25 – 34, 35 – 44, 45 – 54, 55 – 64, 65 years and above) ○ Gender (Male, Female) ○ State (New South Wales / ACT, Victoria / Tasmania, Queensland, Western Australia, South Australia / NT) Due to nil sample for some combinations of age, gender and state, some categories were merged for weighting purposes.
Timing	The online survey was launched on the 23rd September 2013 and remained open until the 1st October 2013.
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.

As the estimates in this report are based on information relating to a sample of the population, rather than a full enumeration, they are subject to sampling variability. That is, they may differ from the estimates that would have been produced if the information had been obtained from the whole population. This difference, called sampling error, should not be confused with inaccuracy that may occur because of imperfections in reporting by respondents or in processing. Such inaccuracy is referred to as non-sampling error and may occur in any enumeration whether it be a full count or sample. Efforts have been made to reduce non-sampling error by careful design of questionnaires, detailed checking of returns and quality control of processing.

The sampling error associated with any estimate can be estimated from the sample results. One measure of sampling error is given by the standard error, which indicates the degree to which an estimate may vary from the value which would have been obtained from a full enumeration (the 'true value'). There are about two chances in three that a sample estimate differs from the true value by less than one standard error, and about 19 chances in 20 that the difference will be less than two standard errors.

The reliability of estimates can also be assessed in terms of a confidence interval. Confidence intervals represent the range in which the population value is likely to lie. They are constructed using the estimate of the population value and its associated standard error. For example, there is approximately a 95% chance (i.e. 19 chances in 20) that the population value lies within two standard errors of the estimates, so the 95% confidence interval is equal to the estimate plus or minus two standard errors.