

Community Perceptions of the Sustainability of the Australian Fishing Industry



May 2018

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About the Research

background

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 to achieving sustainability). The level of awareness and engagement remains one important 'marker' of success for the industry.

To this end, FRDC has conducted a biannual sustainability omnibus (in its current form) since 2011 to gauge the community's perceptions about the achievements and ongoing investment the industry is making into achieving long term sustainability. While there have been some slight changes over this time (including a shift to an annual study for 2018), the core design and metrics have remained unchanged. This has provided continuity in the information available through the program as well as trend information across a number of key metrics.

With that as context, we move to provide an overview of the 2018 design – the fifth piece of research since 2011 covering perceptions of sustainability of the Australian fishing industry.

research objectives

The aim of the research was to track a range of measures including, among others:

- Whether the industry is sustainable;
- How the fishing industry benchmarks against other countries and industries; and
- Knowledge and awareness of the efforts being made.

The quantitative research involved an online survey of a nationally representative sample of randomly selected adult Australians (aged 18 years and over). The survey took approximately 10 minutes to complete.

In total, n = 1,508 surveys were completed over the period to provide robust measures of community perceptions. The research was conducted over the period 4th April to 12th April 2018.

Respondent demographics from the survey were representative of ABS population estimates across age, gender and location to ensure the final results appropriately reflected the current size and structure of the Australian population.

The key findings from the research now follow.

Management Summary

community perceptions about the sustainability of the industry have softened

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 2018 research show that:

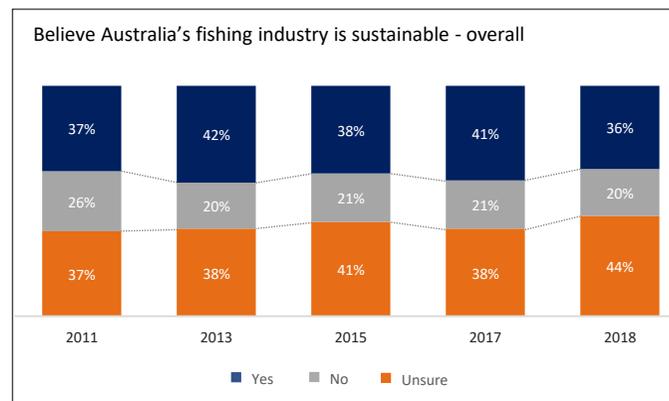
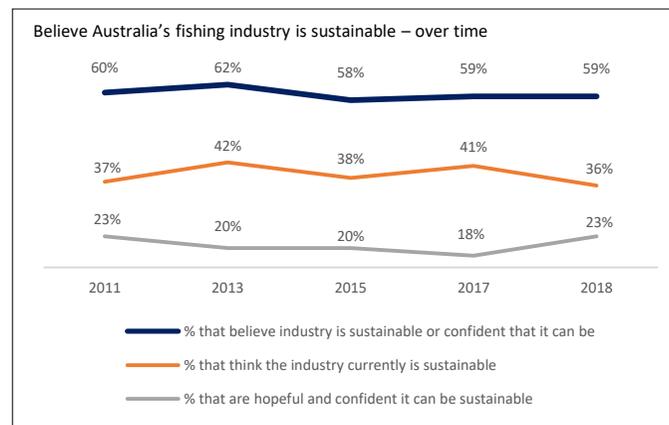
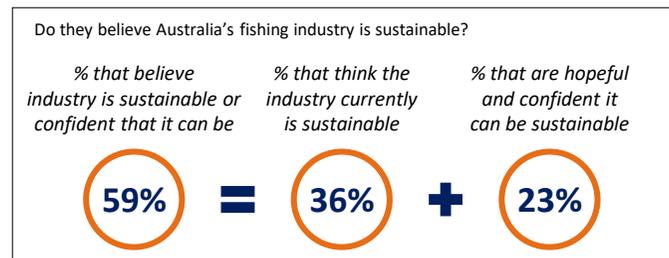
- 59% of all Australians believe that the industry (as a whole) is sustainable or are confident the industry can be sustainable; this result has remained largely unchanged over the past several years.
- 36% believe it is sustainable now; this result is down (-5%) on the 2017 result with the change now reflected in an increase in the proportion of the community who are confident the industry can be sustainable (23%, up 5%). The results are indicating a softening in the conviction about whether the industry is now sustainable.

What remains clear is that:

- There is a consistent cohort (around one in five people) who hold a view that the industry is not sustainable. This result has remained largely unchanged over the past seven years. It would appear that this group may be difficult to shift in their views.
- There is a high level of uncertainty about the sustainability of the industry today (44% unsure). Whilst this cohort report they are unsure about sustainability, they have mixed views about whether the industry can become sustainable. Very few rule out the industry becoming sustainable, with most split around their confidence as to whether the industry can achieve sustainability.

As we understand it, the industry continues to focus on building its credentials in the area of sustainability. The results suggest this focus and investment requires a continuous and ongoing effort as the community view is influenced by a range of factors, some in the control and influence of industry, while others not.

The rate of change in acceptance across the Australian community reflects the size of this challenge, both to sustain this current level and further improve community perceptions. Given these results, a different approach to influencing community perceptions may be warranted. One more targeted and perhaps narrow approach is discussed shortly.



What we've learnt from this research. . . .

females continue to be less convinced about the sustainability of the industry

The results again in 2018 suggest that females are:

- less likely than males to believe the industry is sustainable; and
- more critical across most other measures in the research.

As shown opposite, while perception of the sustainability of the Australian fishing industry have declined for both males and females, the 'gap' between genders remains. The results continue to underscore the need to invest in communicating and engaging with female audiences across the community. This may require a different strategy, approach, language or proposition to better engage them. Further research and exploration into this area is warranted.

the commercial wild catch sector has been identified as a key influencer of overall sustainability

Over the past several surveys, the analysis has pinpointed the strong correlation between community views about the commercial sector and their views about the sustainability of the fishing industry overall. From the results, this year we note that:

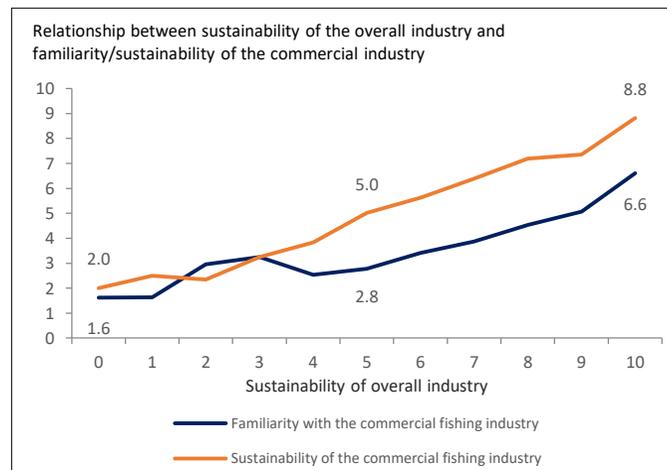
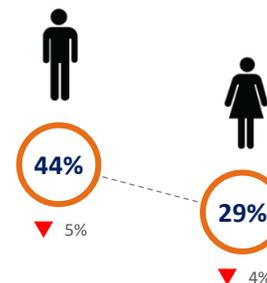
- the community is unfamiliar with the commercial sector. 73% of people rated their familiarity at less than 6.
- there is a clear correlation between familiarity with the commercial sector and perceptions of sustainability of the industry overall. The more familiar people are, the more likely they are to think the industry overall is sustainable.

The challenge in driving overall community perceptions of sustainability will then likely reside in the industry's ability to build a stronger awareness of and engagement with the commercial sector, or to fundamentally shift the discussion to diffuse the strong influence this relationship has on community perceptions.

an immovable 1 in 5?

The research program has, over the past several years, reported a group within the community who do not believe the industry is or could achieve sustainability. This group represents about 1 in 5 of the community and is over represented by non-fishers and non-seafood consumers.

It is likely, given the relative stability of this group, that shifting their views and perceptions will be a hugely difficult challenge. While this does not remove the necessity or ambition to change perceptions, they are a group where achieving change will be challenging, problematic and long term.



The key issues people see impacting on sustainability of the wild catch sector
<i>Theme 1: Overfishing of populations, short term gain for long term loss</i>
<i>Theme 2: Overseas businesses flooding the market with cheap imports and disregarding sustainability of our fish populations</i>
<i>Theme 3: Environmental protection, climate change and it's impact on the marine environment and ecosystems</i>

MANAGEMENT SUMMARY

the more engaged or connected with the fishing industry, the more likely people will believe the industry is or could become sustainable

In previous studies, it was evident that those people who were more 'engaged' with the industry were more likely to hold the view that the industry is or could become sustainable. This result is again evident this time.

Further analysis of the 2018 data was undertaken and has identified three segments:

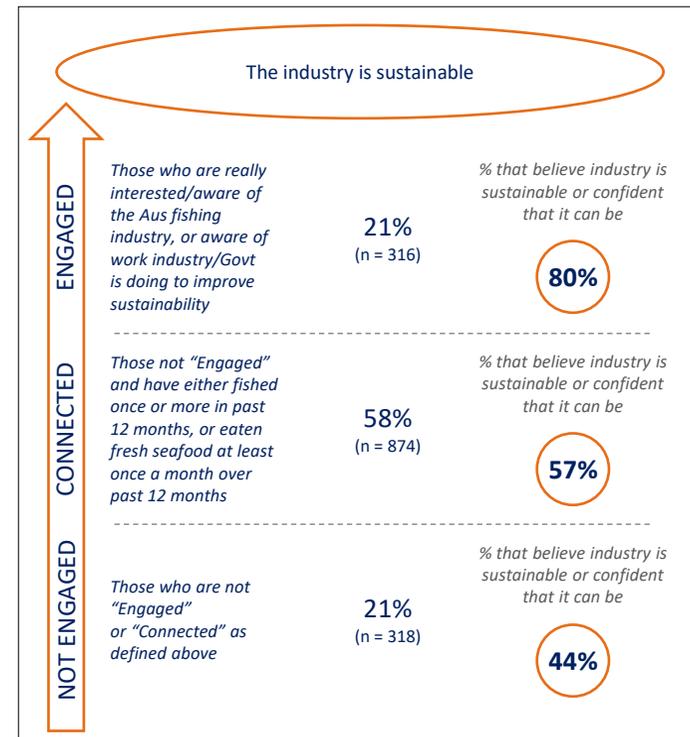
- the **engaged** segment (or those who are interested, familiar with and aware of things that are occurring within and across the industry);
- the **connected** segment (regular rec fishers and/or regular fresh seafood consumers); and
- the **not engaged** segment (those not in either of the other two segments).

The results clearly indicate different perceptions across these three segments.

As discussed previously, a broadcast community-wide effort to change perceptions will require a significant resource and time investment, and require an ongoing continuous effort over the long term. The results (the level and change over time) of community perceptions on the industry's sustainability exhibits the significant challenge.

The segments perhaps offer a different perspective and pathway forward with:

- A need to continue and reinforce the success around sustainability across the 'engaged' segment. Given this segment is already engaged with the industry, existing channels and opportunities to communicate and share the successes achieved and future efforts to improve industry sustainability should be sufficient to reach this segment.
- An opportunity to target the 'connected' segment to more directly persuade and influence their perceptions with targeted efforts. This might be done using:
 - Fishing industry publications, websites, social media and blogs to reach and engage with the rec fisher community; and
 - Point of sale focus for the fresh seafood consumers. It is evident that the CoO labelling and sustainable accreditation are the 'obvious' mechanism to engage with consumers. Leveraging these opportunities and other POS opportunities should provide the opportunity to engage directly with seafood consumers.
- A more passive and selective approach to communicating with the 'not engaged' segment. This might include a downstream effect created by the established communications and promotions rather than any specific investment targeted to create a broad and wide change in perceptions.



Six additional insights from the research. . . .

1 Australians continue to believe sustainability is a shared responsibility

Within the research, respondents held the view that the responsibility for the sustainability of the Australian fishing industry is shared across all of the community, commercial fishers and the government.

Whilst the responsibility was seen to be shared, governments and commercial fishing operators were considered the custodians. This assignment of responsibility to commercial fishers (among other stakeholders) again reiterates the influencing role they can and do play in shaping people’s views of the sustainability of the industry overall. Any efforts to engage the broader community in a shared responsibility model might help diffuse the current focus on the commercial sector as carrying primary responsibility for this.

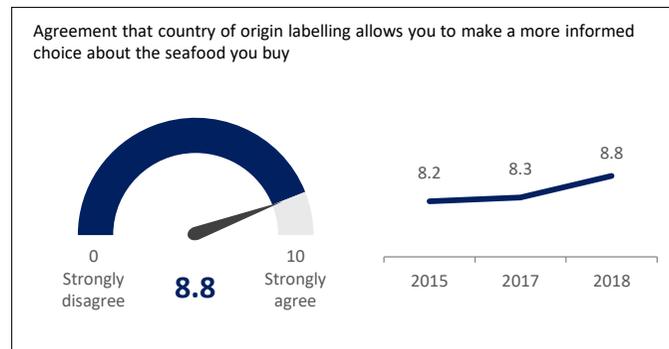
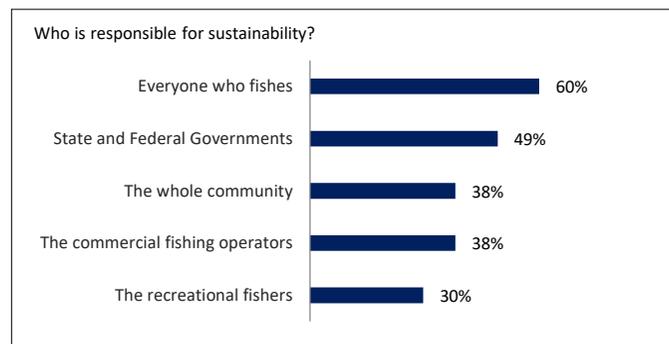
2 country of origin labelling empowers customers to make more informed decisions about seafood

While this result does not relate to any one specific sector or part of the supply chain, the 2018 research confirms the increasing number of the community who believe country of origin labelling (as a general mechanism) is empowering. More than 79% rated their agreement at 8 or above (out of a possible 10) while less than 4% rated their agreement lower than a ‘5’.

The results are now indicating an overwhelming majority of the community see the CoO labelling as one of the important (and perhaps one of the few) signposts in their purchasing decisions. Connecting CoO labelling to the sustainability proposition might be another way of shifting the broader community perceptions.

3 more people are getting on board with certification

Consumer support for certification systems received good support in the most recent research. The majority of consumers agree that certification systems provide confidence that the seafood is sustainable. We also note that this result has improved since the 2017 research (up 0.5). This should provide further encouragement to continue to support certification across the fresh seafood sector. Further reinforcement of this perception together with building and maintaining a strong link between certification and Australian seafood might also help with the ambition of changing community perceptions.



4 the community believe the Australian fishing industry is ahead of other countries

More than two in three people (67%) believe Australia's fishing industry is more sustainable than other countries.

This result is consistent with that reported in previous years and indicates a widespread view that, comparatively, the Australian industry is more sustainable.



5 the concerns of the Australian community vary on some quite specific issues

For the first time in this program of research, questions about the level of concern across a range of issues were measured. These measures were similar to those collected internationally by the Canadian Centre for Food Integrity and also the USA Centre for Food Integrity.

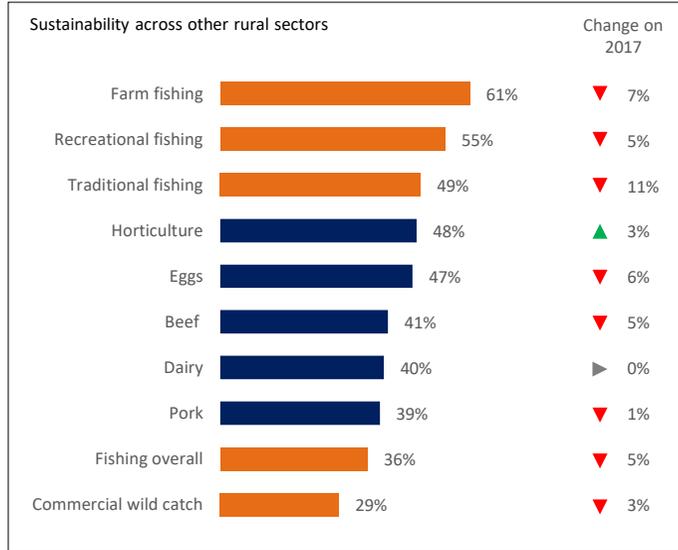
While on a number of measures Australians rate similar levels of concern, it was noteworthy that there is a greater level of concern about the safety of food imported from outside Australia and lower levels of concern about the safety of food produced in Australia.

Concerns about "life issues"	2018 FRDC	2018 USA	2017 Canada	2016 Canada
The safety of food imported from outside of Australia	70%	59%	52%	*
Keeping healthy food affordable	65%	65%	61%	66%
The rising cost of food / affordability of food	61%	63%	62%	69%
Environmental sustainability of food produced in Australia	49%	*	*	*
The safety of food produced in Australia	48%	59%	51%	54%

6 the view of the fishing industry remains behind that of other sectors

Australians continue to hold different views on sustainability across the various rural sectors. In the 2018 research, community views about the sustainability of the different sectors have moved (mostly) downward. That is, fewer people are acknowledging the different sectors as sustainable.

Changes in perceptions of the fishing industry have already been noted but are consistent with this reported in other sectors. It is clear however that the community perceptions of the commercial sector are dampening the overall perceptions of the fishing industry.



This now concludes the management summary for this study.

Detailed Findings

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

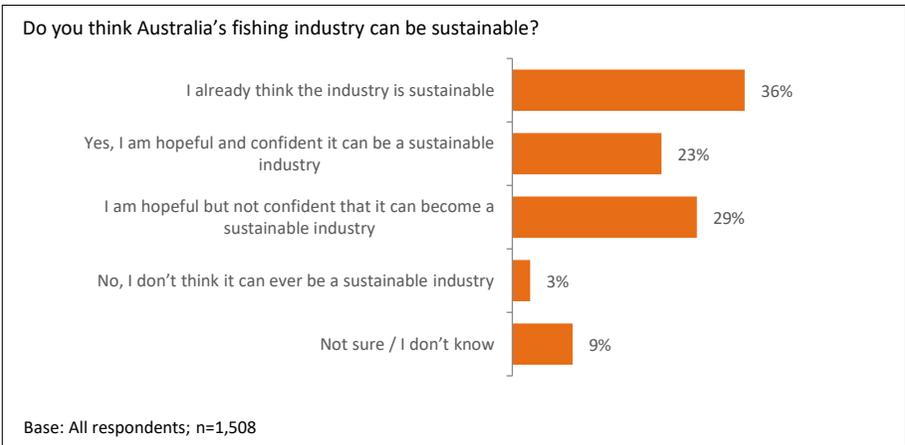
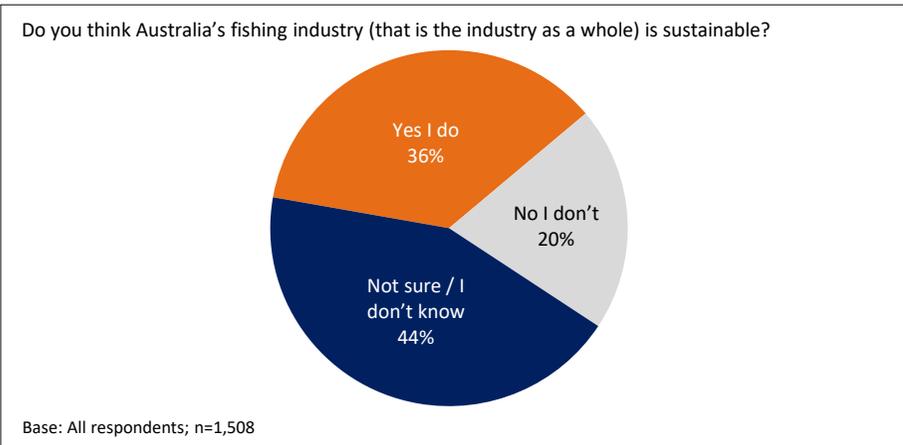
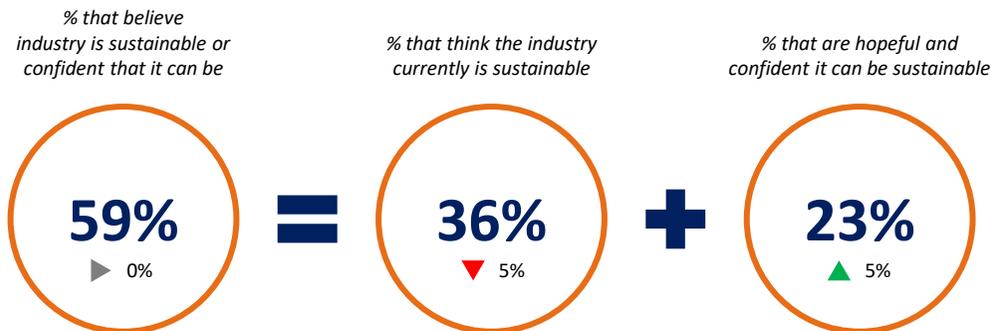
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

Concern and Trust on Life Issues

Those who believe sustainability is possible



What we asked:

Do you think Australia's fishing industry (that is the industry as a whole) 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?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

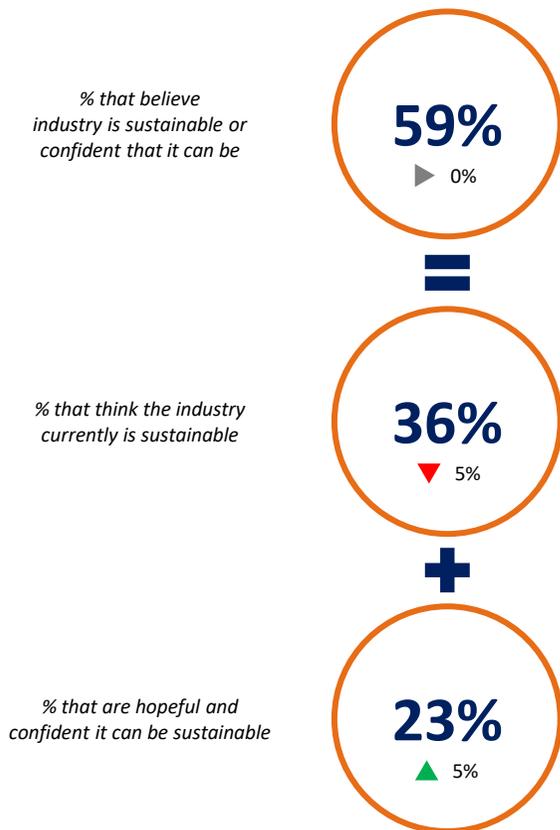
Sustainability of Industry Sectors

Balancing Economics and Sustainability

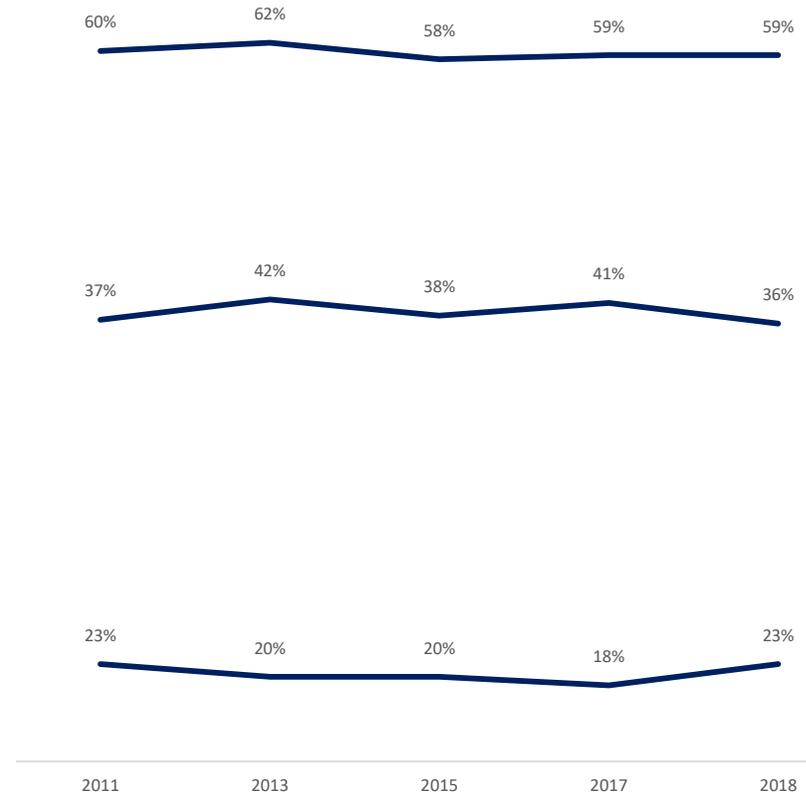
Sustainability of Other Industries

Concern and Trust on Life Issues

Those who believe sustainability is possible



Results over time



What we asked:

Do you think Australia's fishing industry (that is the industry as a whole) 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?
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DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

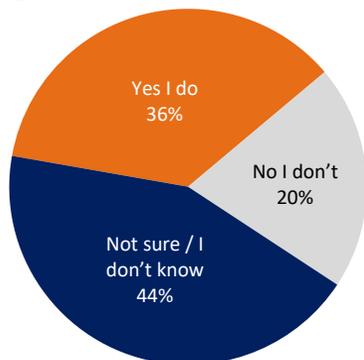
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

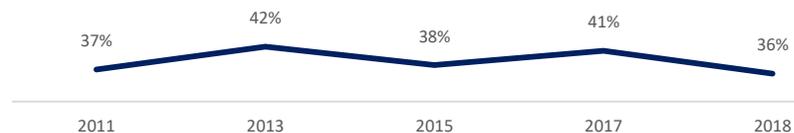
Concern and Trust on Life Issues

Do you think Australia's fishing industry (that is the industry as a whole) is sustainable?

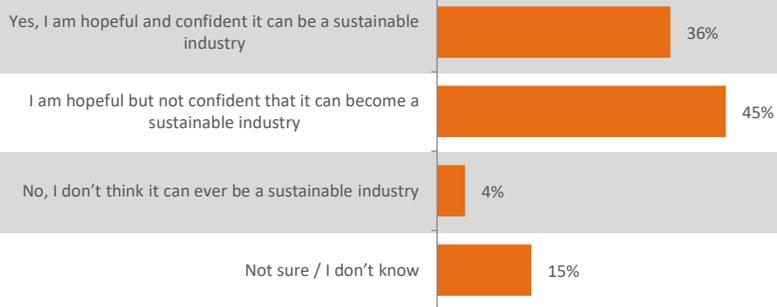


Base: All respondents; n=1,508

Results over time



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



Base: All respondents who do not think or are unsure whether Australia's fishing industry is sustainable; n=964

Results over time



What we asked:

Do you think Australia's fishing industry (that is the industry as a whole) 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?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

Sustainability of Industry Sectors

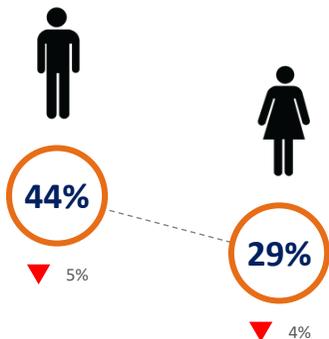
Balancing Economics and Sustainability

Sustainability of Other Industries

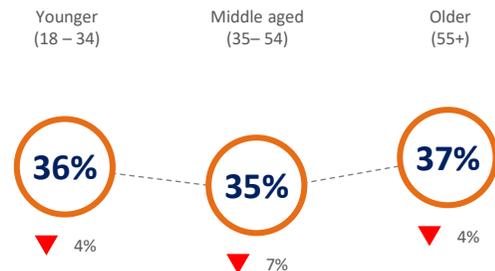
Concern and Trust on Life Issues

Do you think Australia's fishing industry (that is the industry as a whole) is sustainable? A view of different key segments

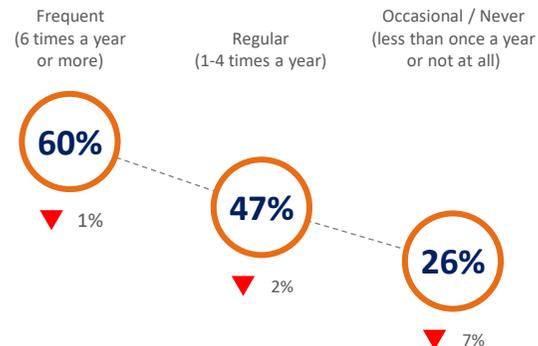
Gender



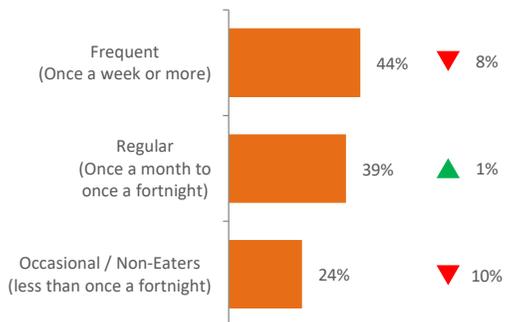
Age



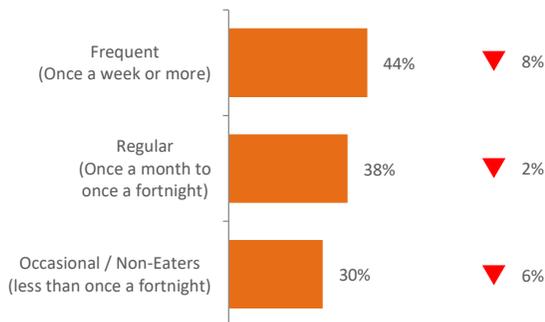
Recreational fishers



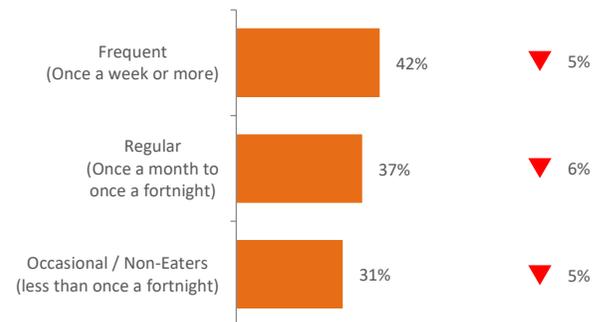
Fresh seafood consumers



Frozen seafood consumers



Tinned seafood consumers



What we asked:

Do you think Australia's fishing industry (that is the industry as a whole) 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?

DETAILED FINDINGS



A look at perceptions of sustainability by engagement with the industry	the “Engaged” segment	the “Connected” segment	the “Not Engaged” segment
Descriptor	<p><i>Respondents who are either:</i></p> <ul style="list-style-type: none"> • Really interest and aware of the fishing industry in Australia; or • Aware of the work the industry or Government is doing to improve sustainability 	<p><i>Respondents who not in the “Engaged” segment and:</i></p> <ul style="list-style-type: none"> • Have fished at least once in the past 12 months; or • Have eaten fresh seafood for a main meal at least once a month over the past 12 months 	<p><i>Respondents who not in either the “Engaged” segment or the “Connected” segment.</i></p>
% of Base	21% (n = 316)	58% (n = 874)	21% (n = 318)
% that believe industry is sustainable or confident that it can be	80%	57%	44%
% that think the industry currently is sustainable	59%	34%	19%
% that are hopeful and confident it can be sustainable	21%	23%	25%

This group is clearly more engaged, expressing a strong interest in the industry and awareness of what industry and Government are doing to improve sustainability.

While not reporting an interest in the industry, this group are by default connected – either because they fish regularly or consume fresh seafood regularly. They have then more regular and frequent touch points with the industry.

This group appears to have little engagement with the industry – they report no interest in the industry, and are not regular fishers or consumers. They are likely to have few direct interactions with seafood or the industry.

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

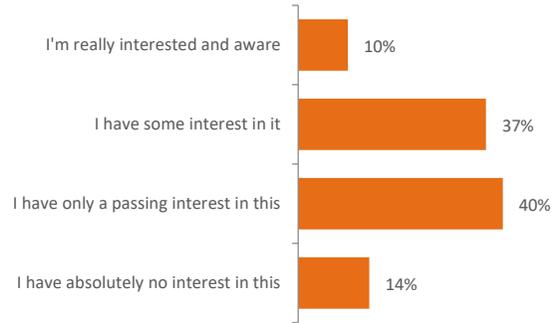
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

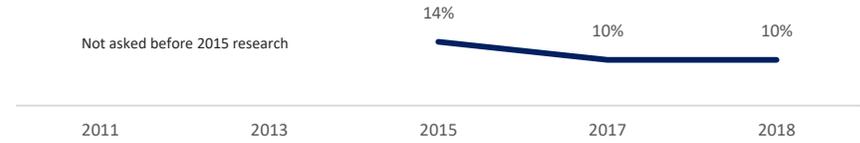
Concern and Trust on Life Issues

Interest in and awareness of the fishing industry in Australia

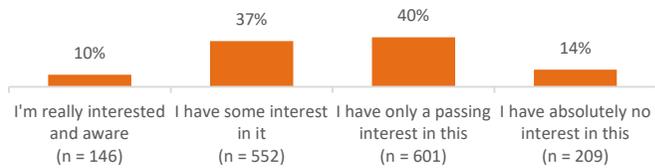


Base: All respondents; n=1,508

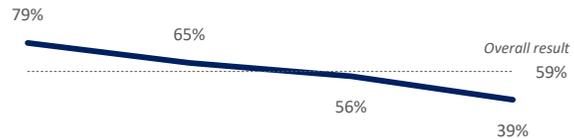
Results over time – those who are really interested and aware



Do these groups vary in their view of whether they believe sustainability is possible?



% that believe industry is sustainable or confident that it can be



What we asked:

Which of the following best describes your interest in and awareness of the fishing industry in Australia?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

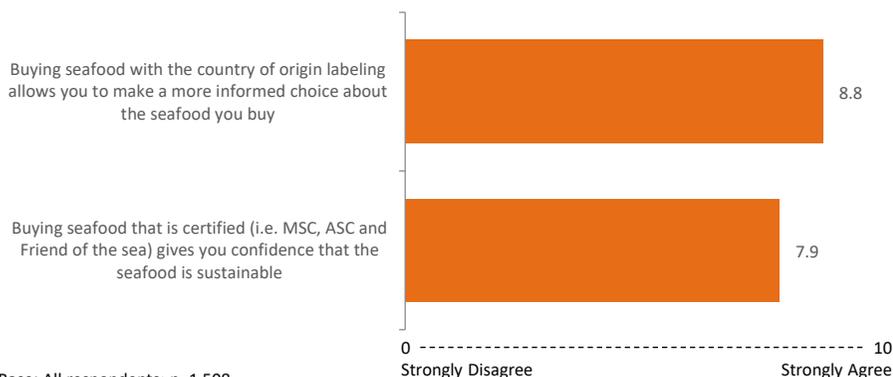
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

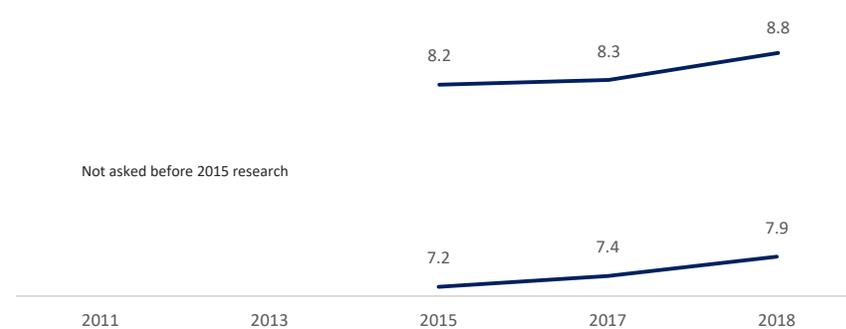
Concern and Trust on Life Issues

To what extent do you agree or disagree with the following statements:

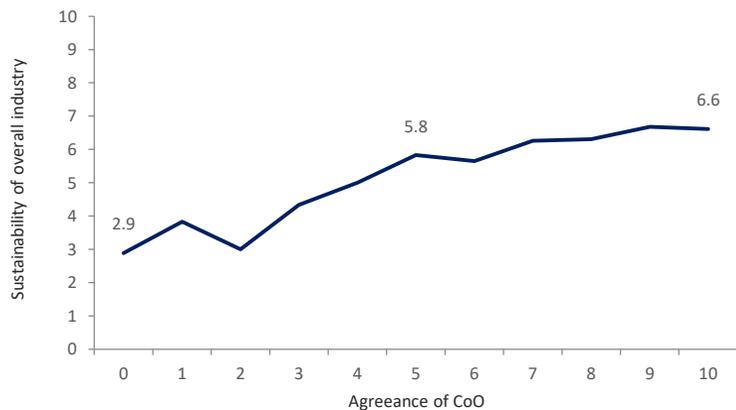


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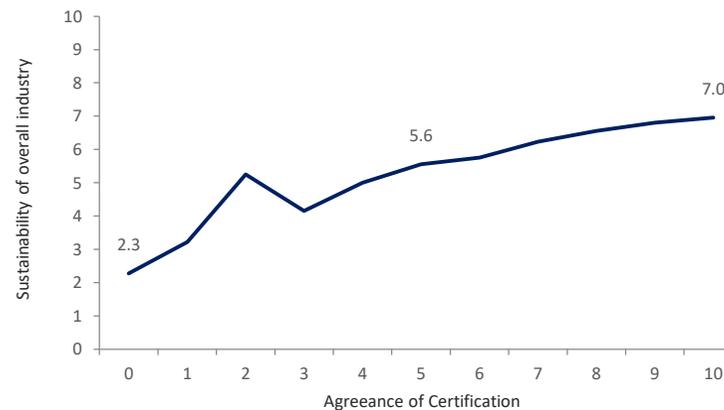
Results over time



Is there a relationship between agreeance of CoO and perceptions of the sustainability of the overall industry?



Is there a relationship between agreeance of certification and perceptions of the sustainability of the overall industry?



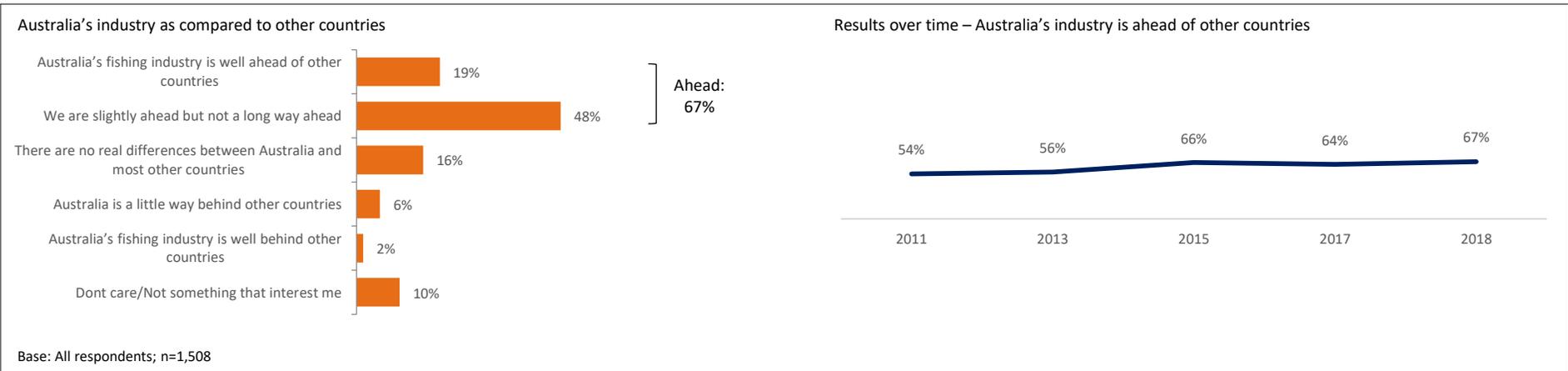
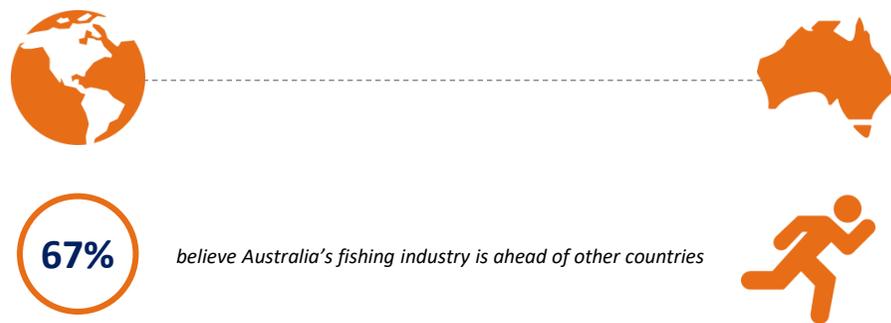
What we asked:

To what extent do you agree or disagree with the following statements:

DETAILED FINDINGS

- Sustainability of the Industry
- Awareness and Interest of the Industry**
- Sustainability of Industry Sectors
- Balancing Economics and Sustainability
- Sustainability of Other Industries
- Concern and Trust on Life Issues

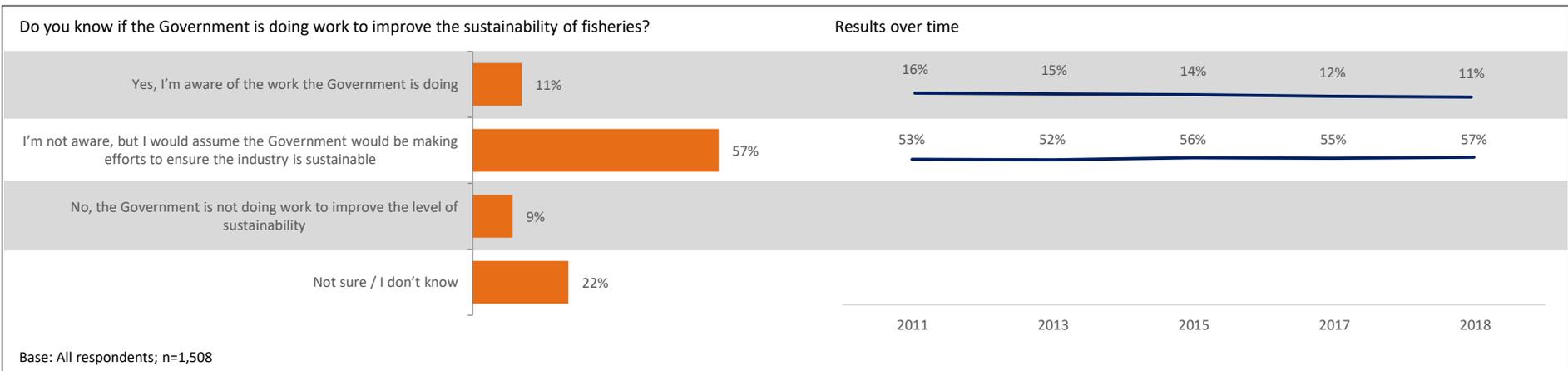
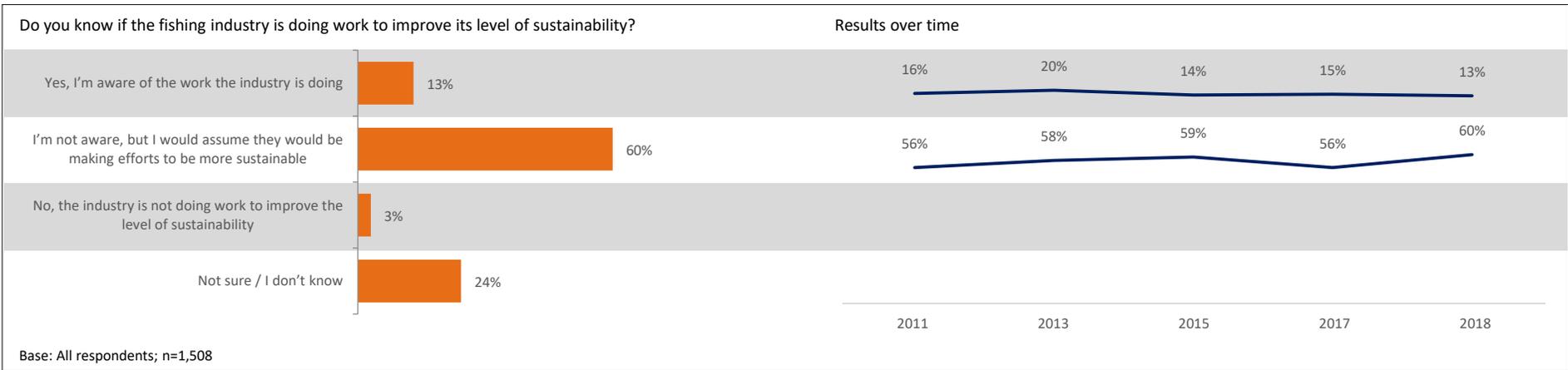
Australia's industry as compared to other countries



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?

DETAILED FINDINGS

- Sustainability of the Industry
- Awareness and Interest of the Industry**
- Sustainability of Industry Sectors
- Balancing Economics and Sustainability
- Sustainability of Other Industries
- Concern and Trust on Life Issues



What we asked:

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

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

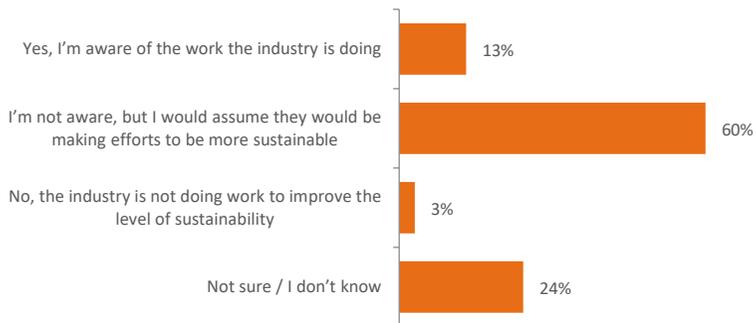
Sustainability of Industry Sectors

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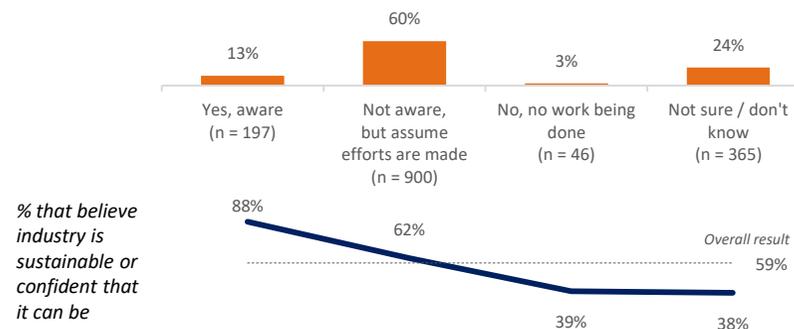
Concern and Trust on Life Issues

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

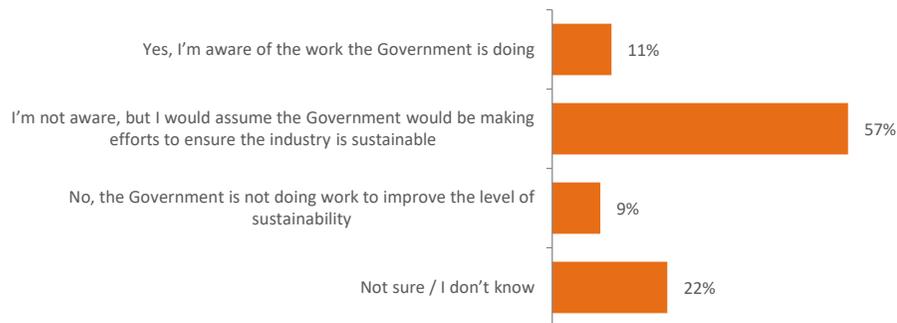


Base: All respondents; n=1,508

Do these groups vary in their view of whether they believe sustainability is possible?

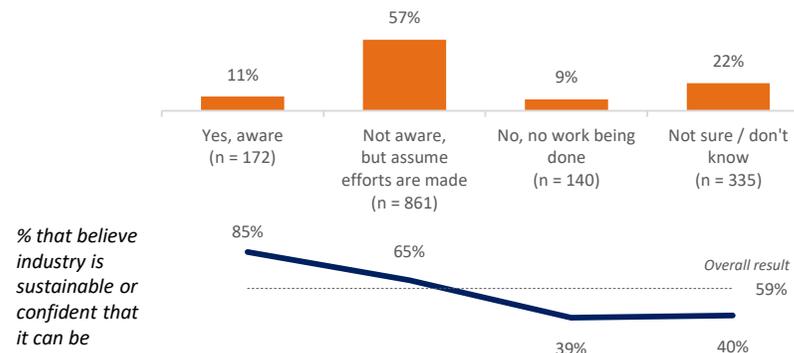


Do you know if the Government is doing work to improve the sustainability of fisheries?



Base: All respondents; n=1,508

Do these groups vary in their view of whether they believe sustainability is possible?



What we asked:

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

DETAILED FINDINGS

Sustainability of the Industry

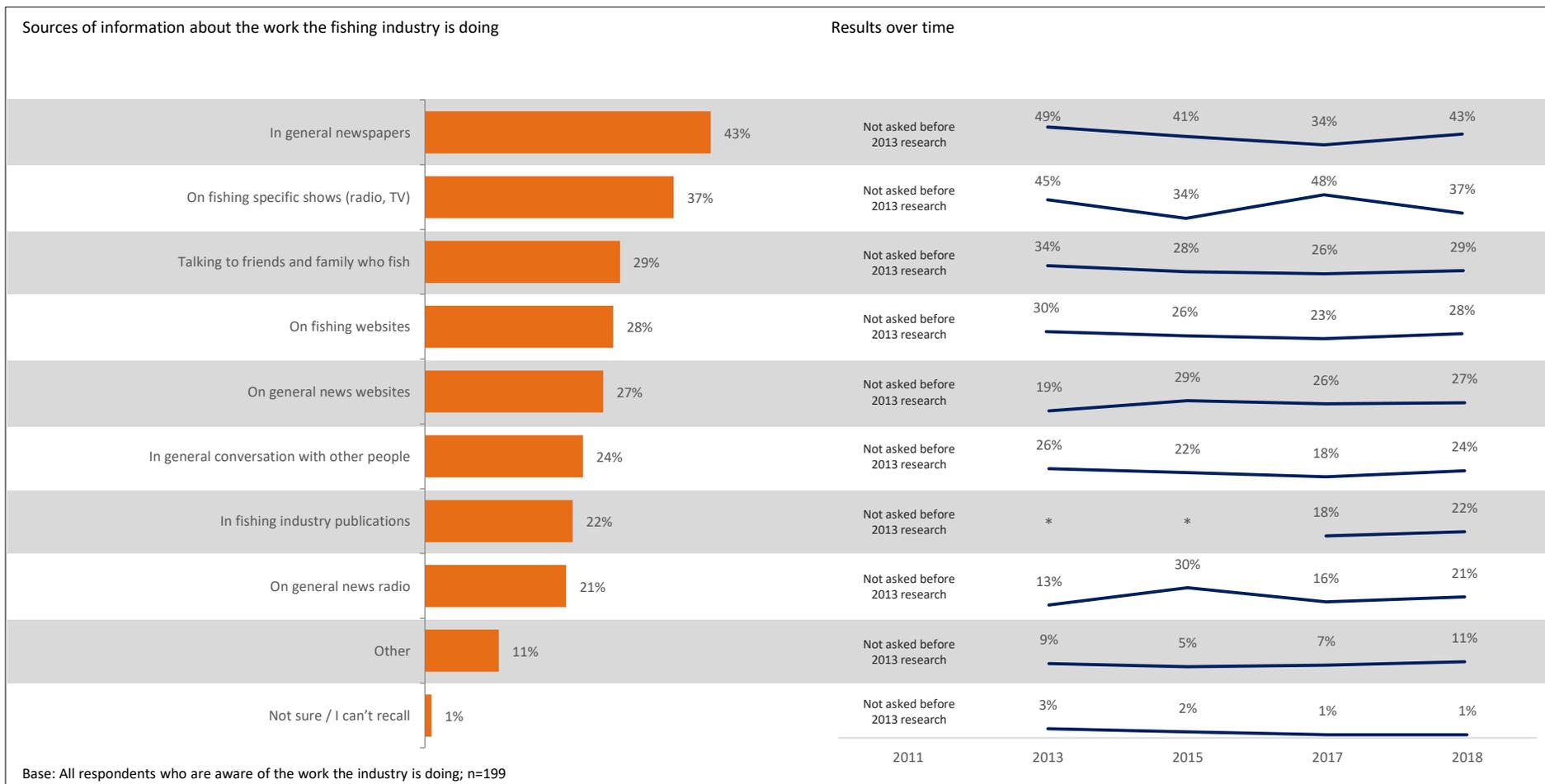
Awareness and Interest of the Industry

Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

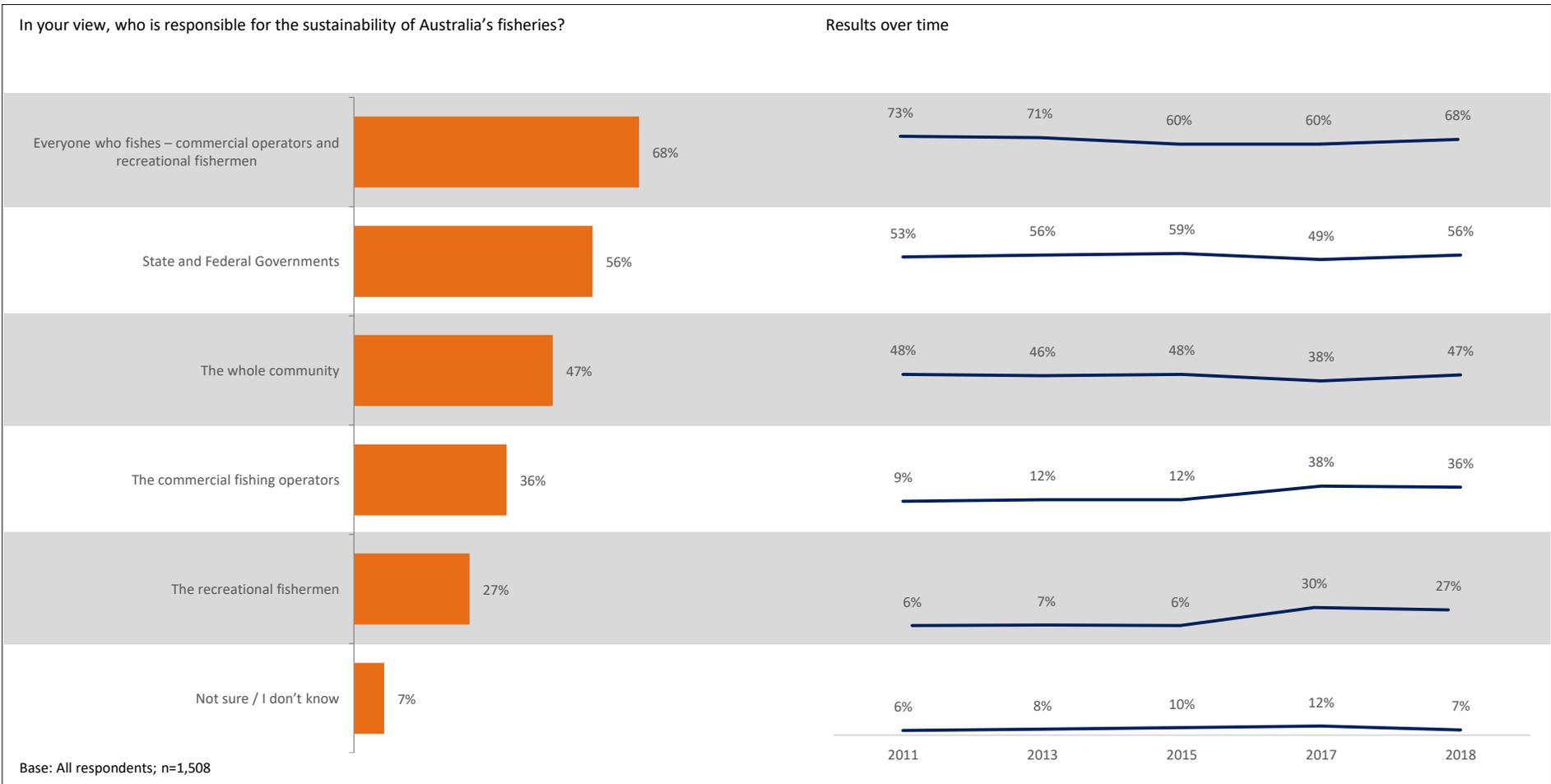
Concern and Trust on Life Issues



What we asked:

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

DETAILED FINDINGS



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

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

Concern and Trust on Life Issues



What we asked:

And what sort of responsibility does each of these have?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

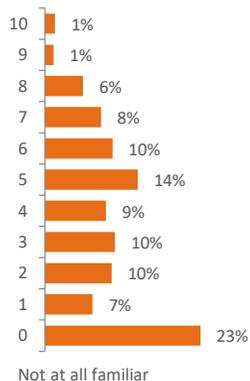
Concern and Trust on Life Issues

Familiarity with the Australian commercial fishing industry

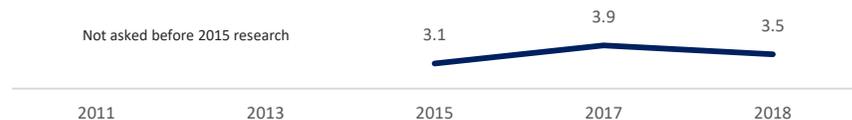


Base: All respondents; n=1,508

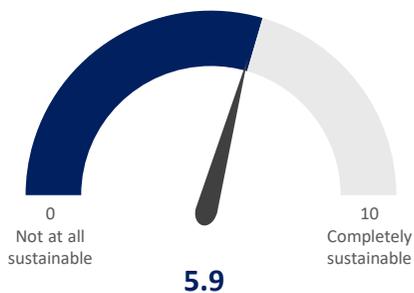
Extremely familiar



Results over time

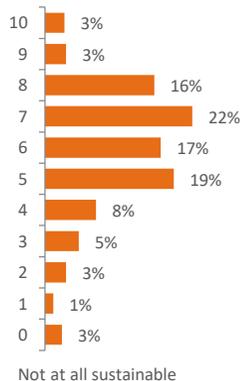


Sustainability of Australian commercial fishing overall



Base: All respondents; n=1,508

Completely sustainable



Results over time



What we asked:

How familiar would you say you with how the commercial fishing industry – for example in how big it is, where its located, what commercial fishers fish for, how they fish and how they operate? With that in mind, on a scale of 0 to 10, how sustainable do you think Australian commercial fishing is overall?

DETAILED FINDINGS

Sustainability of the Industry

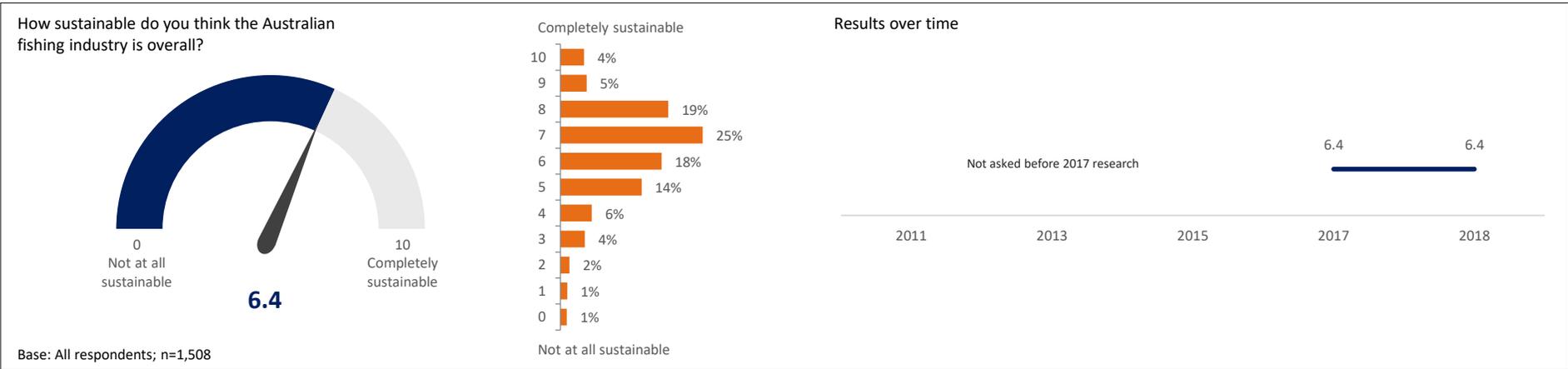
Awareness and Interest of the Industry

Sustainability of Industry Sectors

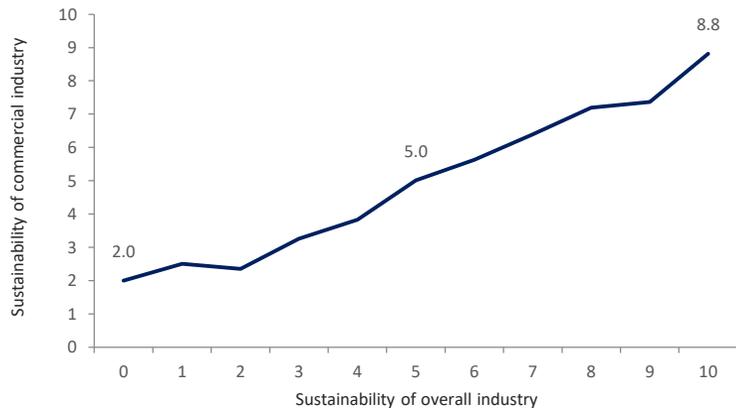
Balancing Economics and Sustainability

Sustainability of Other Industries

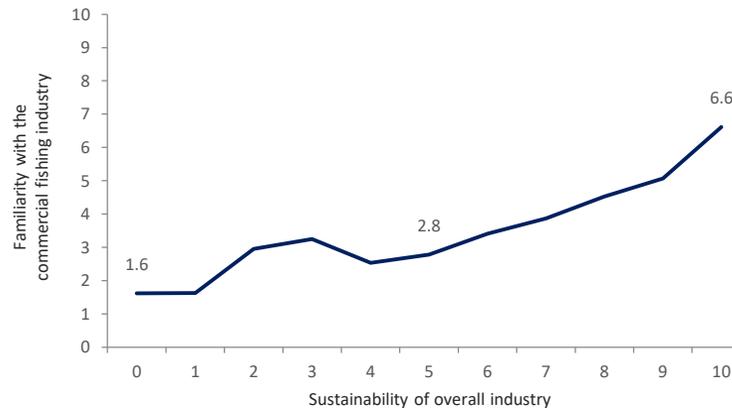
Concern and Trust on Life Issues



Are perceptions of sustainability similar between the overall industry and the commercial industry?
0 – Not at all sustainable, 10 – Completely sustainable



Is there a relationship between familiarity of the commercial fishing industry and perceptions of the sustainability of the overall industry?



What we asked:
With that in mind, on a scale of 0 to 10, how sustainable do you think Australian fishing industry is overall? Please consider all sectors of the industry (commercial fishers, aquaculture and recreational fishing)

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

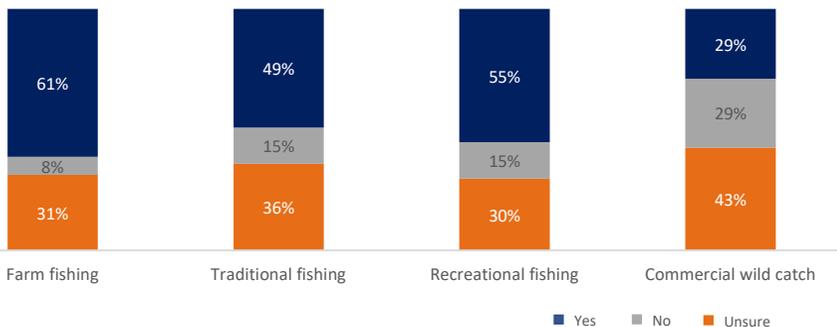
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

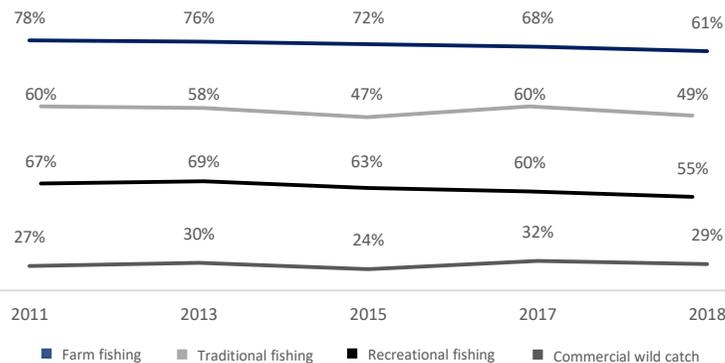
Concern and Trust on Life Issues

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

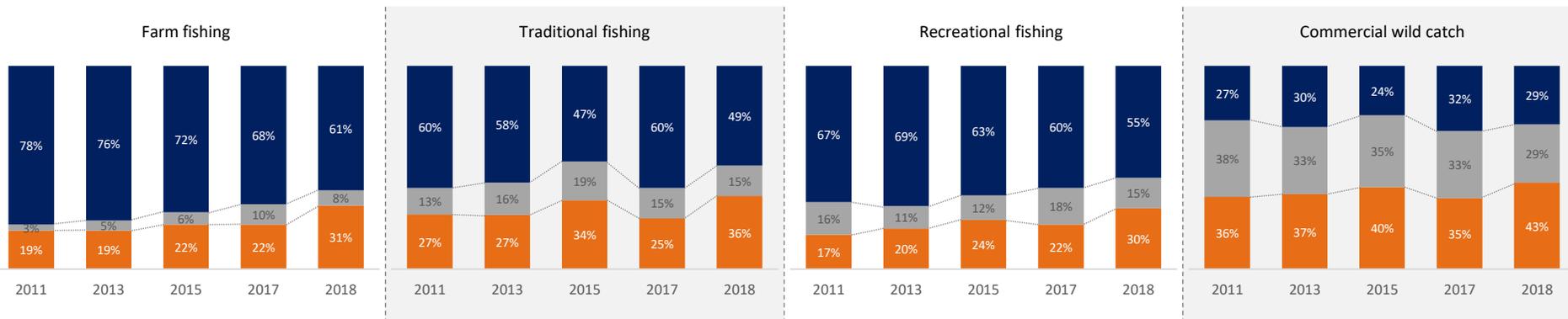


Base: All respondents; n=1,508

Results over time – of those who answered “Yes”



Results over time – by sector



What we asked:

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

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

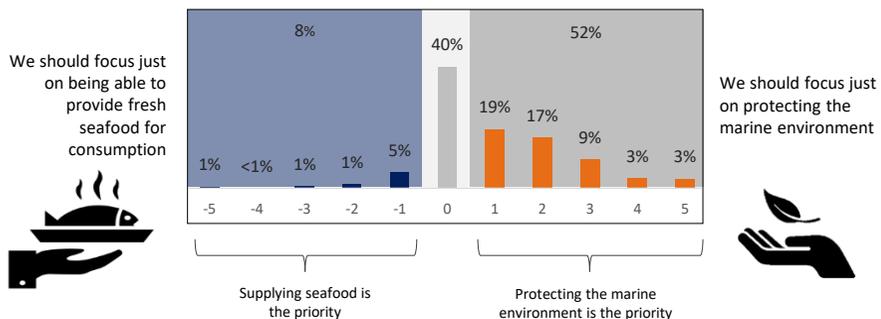
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

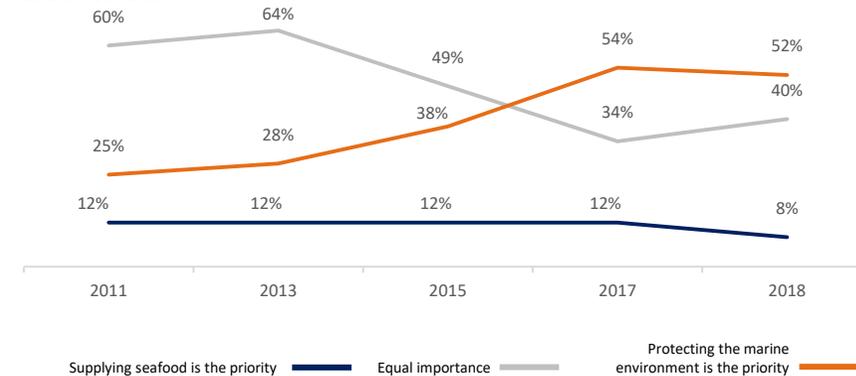
Concern and Trust on Life Issues

Balance between supplying sufficient fresh seafood and protecting marine environment

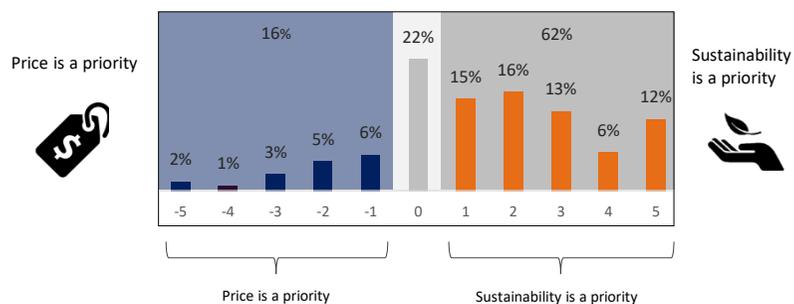


Base: All respondents; n=1,508

Results over time

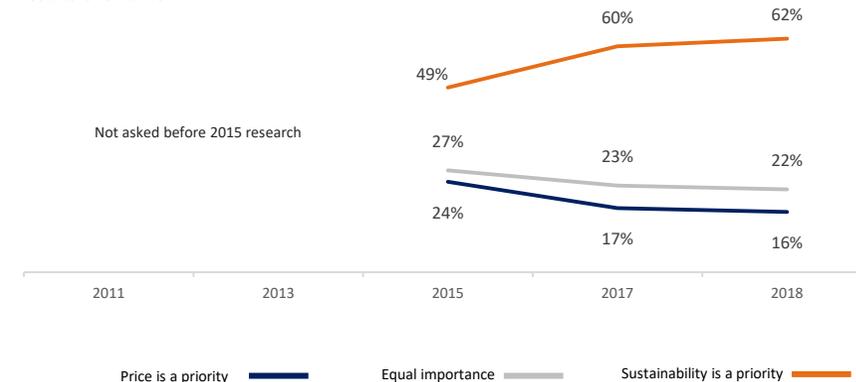


Balance between price and sustainably caught seafood



Base: All respondents; n=1,508

Results over time



What we asked:

Most Australians acknowledge that it's 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?

When it comes to buying seafood, there can often be a trade-off between buying the cheapest seafood and buying sustainably caught seafood. When you are buying seafood, which is more important, price or sustainably caught seafood?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

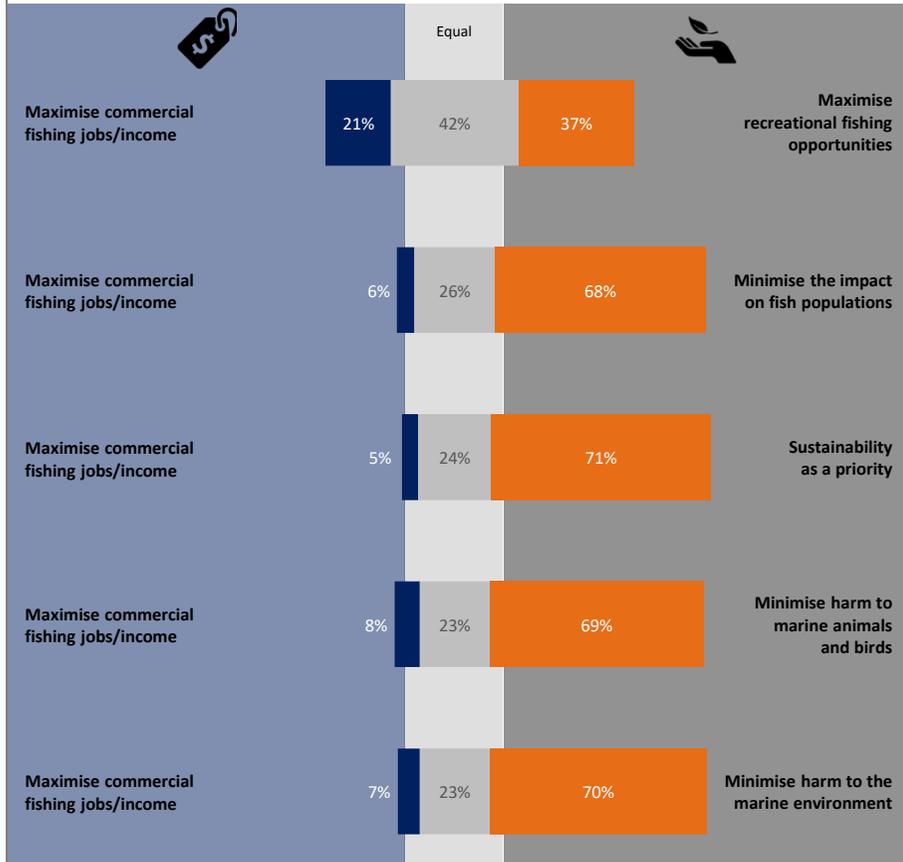
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

Concern and Trust on Life Issues

Balance between environmental considerations and social/ economic considerations



Base: All respondents; n=1,508

Results over time – % of those who leaned towards environmental considerations



What we asked:

Managing fisheries often involves difficult trade-offs between environmental conditions and social and economic considerations. Where do you think the balance between these potentially conflicting values should be in the future?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

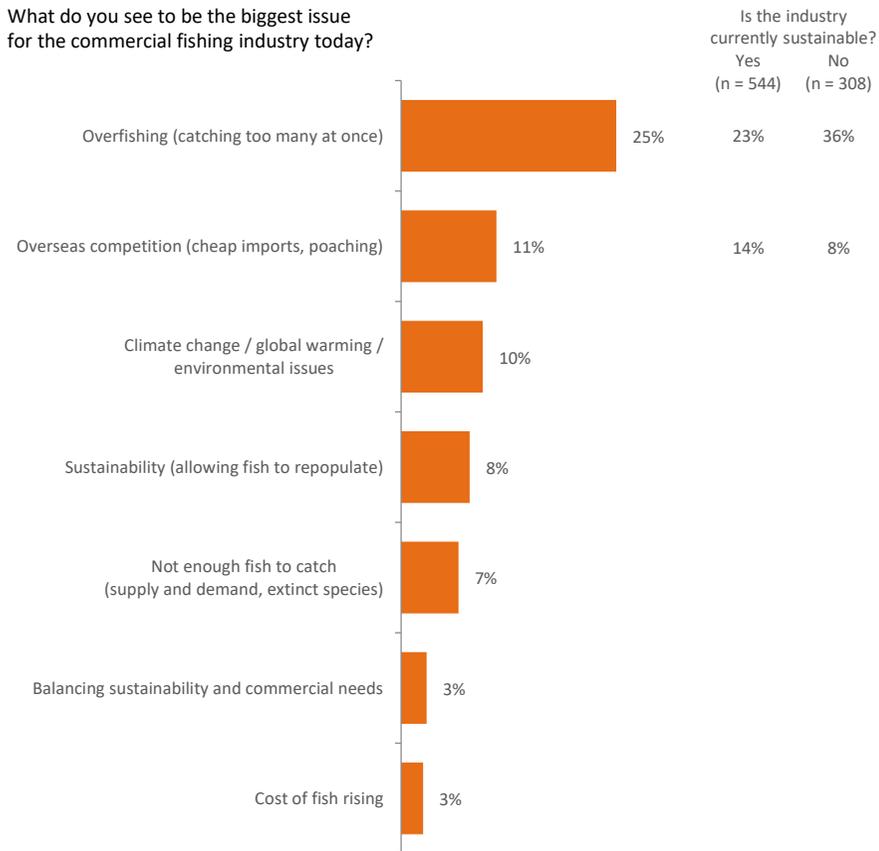
Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

Concern and Trust on Life Issues

What do you see to be the biggest issue for the commercial fishing industry today?



Base: All respondents; n=1,508. Results shown only if mentioned by > 2% of respondents.
 Note: 24% of respondents either did not address the questions, or were not sure / did not know.

Some of what they said...

Overfishing

“Overfishing. Short term gain for long term loss because corporations don't gather fish in a quantity that is at all sustainable for the future of the industry.”

“Overfishing is the biggest issue. It refers to the practice of catching fish faster than they are able to reproduce. The large fish are vulnerable to this and are slow to reproduce. As overfishing takes place over time, these species decrease and fisherman begin 'fishing down the food chain,' shifting focus from catching predators to species lower in the food web, like sardines and squid. Removing these prey species from the marine environment impact predators and the aquatic ecosystem.”

Overseas Competition

“Overseas imports flooding our market with product which in many cases is produced in questionable situations. This cheap product is usually inferior & non-hygienically produced.”

“That the smaller, locally owned and operated ventures are not taken over by overseas multinationals. Generally, overseas businesses don't care about the damage or sustainability to our local waterways or fish populations.”

Environmental issues

“Environmental protection and sustainability - without a healthy river and ocean system, the commercial fishing industry won't have a long future! You have to first look after the very system that your whole industry is reliant on!”

“Climate change and its impact on the marine environment and its impact on the marine ecosystems.”

What we asked:

What do you see to be the biggest issue for the commercial fishing industry today?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

Sustainability of Industry Sectors

Balancing Economics and Sustainability

Sustainability of Other Industries

Concern and Trust on Life Issues

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



Please note: the question was not specific to one of the fresh, frozen or tinned segments specifically but rather an overall perception of the percentage grown and caught in Australia.

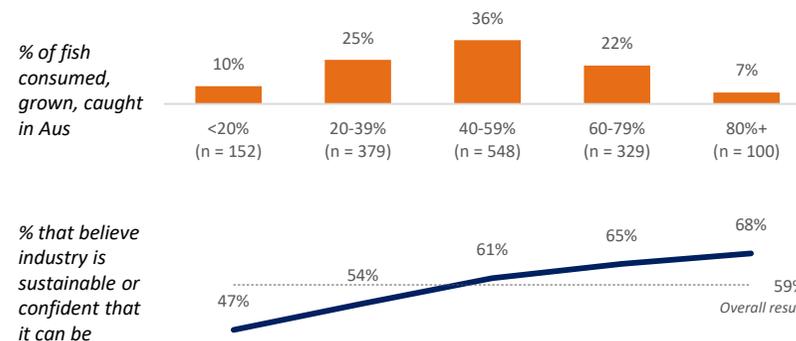
Base: All respondents; n=1,508

Some of what they said...

People responded with different estimates of the proportion of fish grow and caught in Australia. The range of different estimates is shown in the chart below (e.g. 25% believed it was between 20% and 39%).

Distribution of estimates provided	10%	25%	36%	22%	7%
	<20%	20-39%	40-59%	60-79%	80%+
2017:	14%	26%	38%	18%	4%
2015:	14%	26%	38%	18%	4%

Do those who have varying views of the percentage of fish consumed by Australians grown and caught in Australia also vary in their view of whether they believe sustainability is possible?

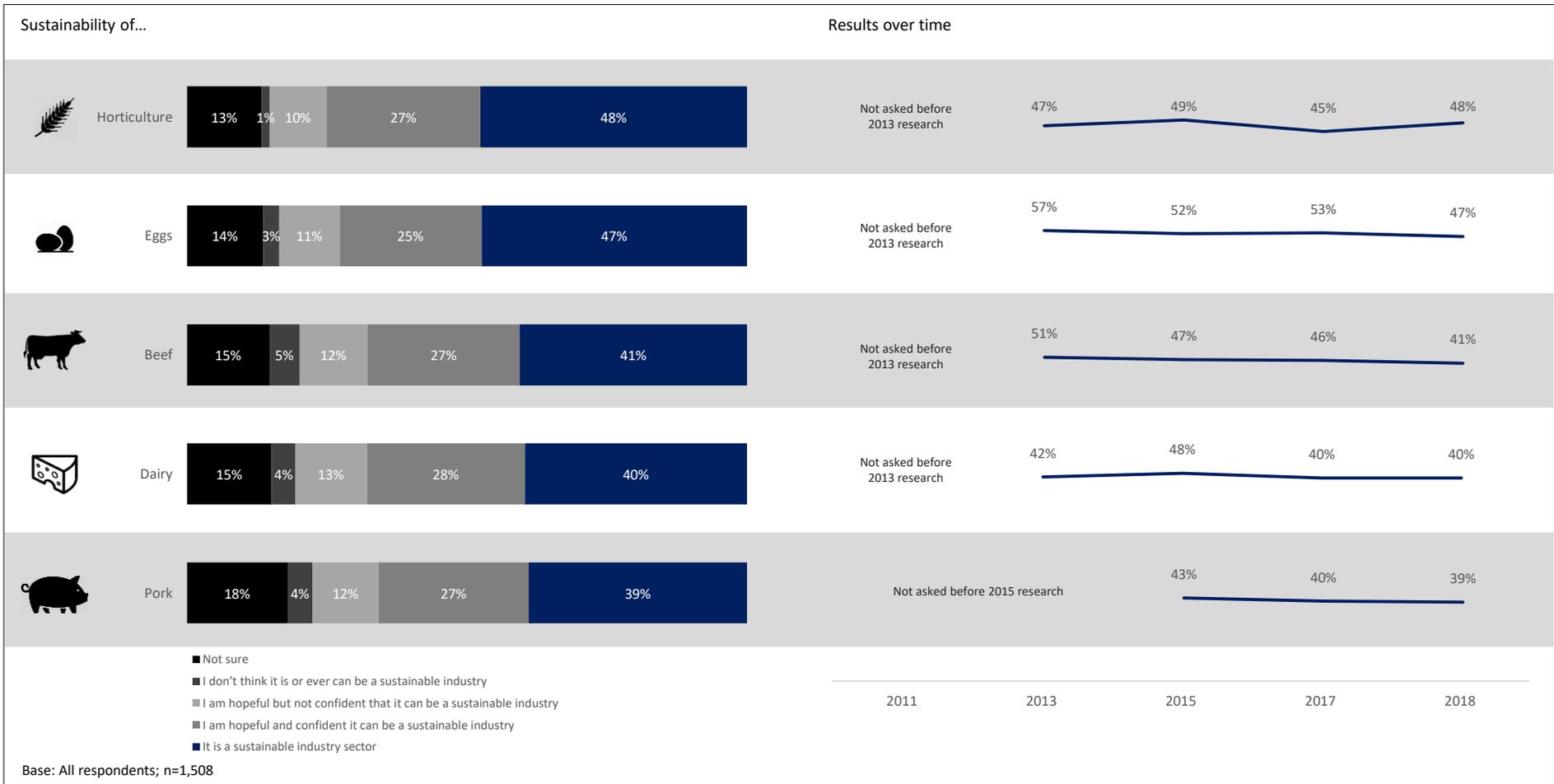


What we asked:

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?

DETAILED FINDINGS

- Sustainability of the Industry
- Awareness and Interest of the Industry
- Sustainability of Industry Sectors
- Balancing Economics and Sustainability
- Sustainability of Other Industries**
- Concern and Trust on Life Issues



What we asked:

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

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

Sustainability of Industry Sectors

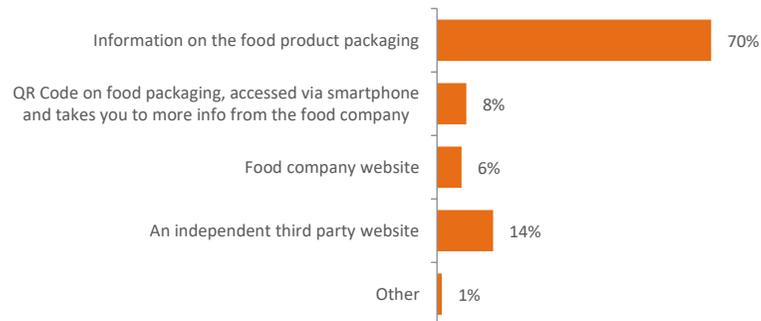
Balancing Economics and Sustainability

Sustainability of Other Industries

Concern and Trust on Life Issues

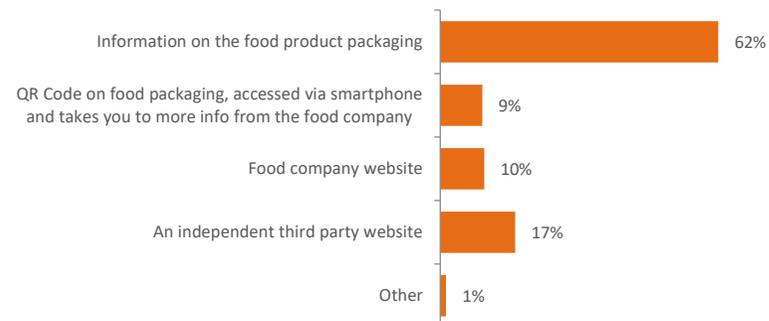
Where would you most prefer to access information from food companies regarding...

...how their food products may impact your health?



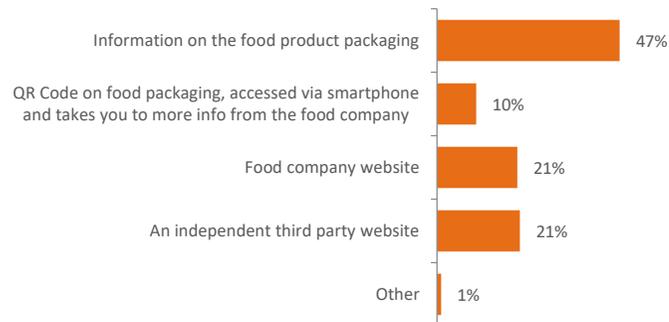
Base: All respondents; n=1,508

...food safety?



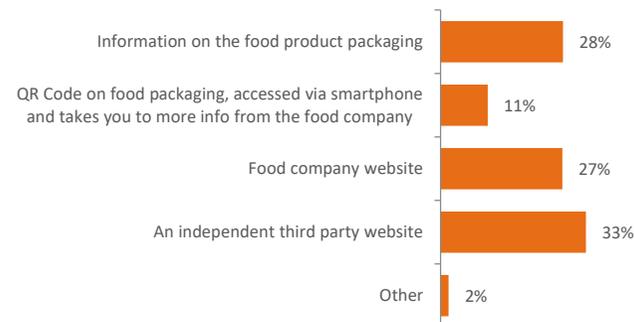
Base: All respondents; n=1,508

...their environmental stewardship?



Base: All respondents; n=1,508

...labour and human rights?



Base: All respondents; n=1,508

What we asked:

Where would you most prefer to access information from food companies regarding...

...how their food products may impact your health?

...food safety?

...their environmental stewardship?

...labour and human rights?

DETAILED FINDINGS

Sustainability of the Industry

Awareness and Interest of the Industry

Sustainability of Industry Sectors

Balancing Economics and Sustainability

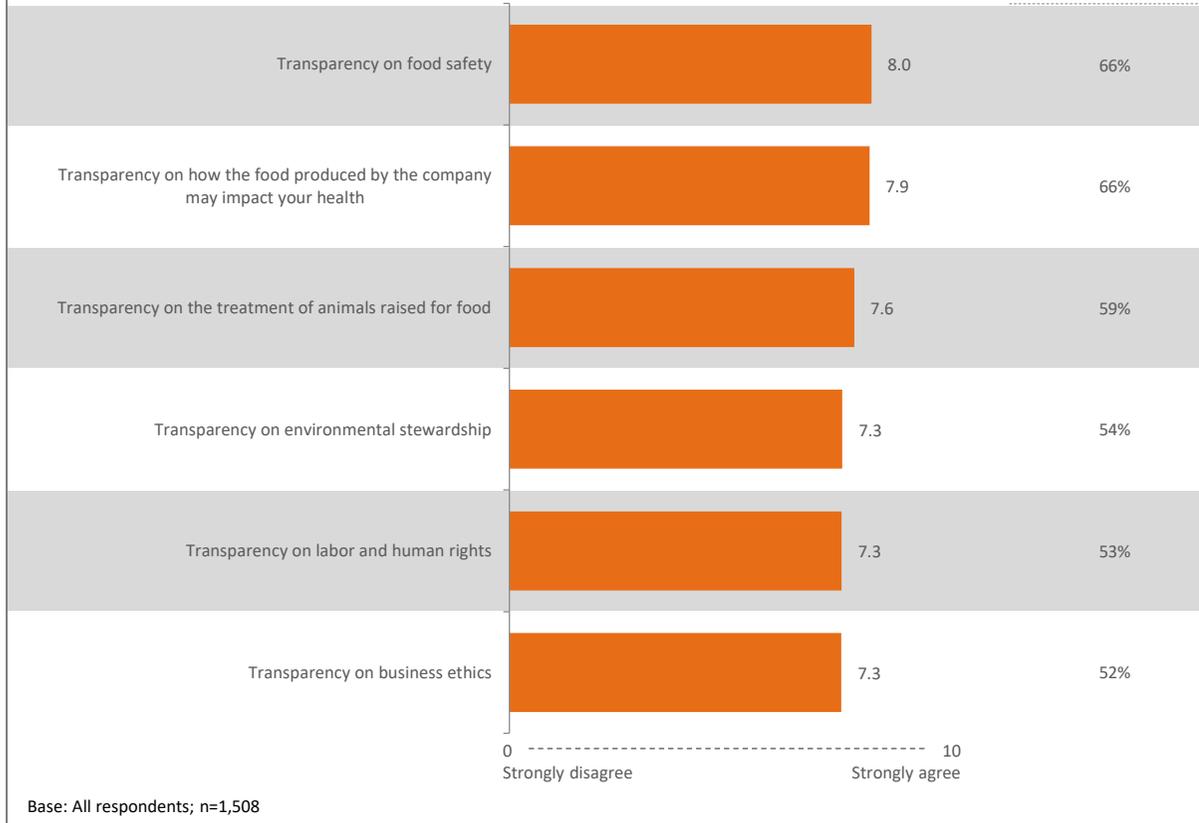
Sustainability of Other Industries

Concern and Trust on Life Issues

Now, please indicate the extent that being transparent in each of these areas builds your trust with food companies.

% rating 8-10

2018
FRDC Research

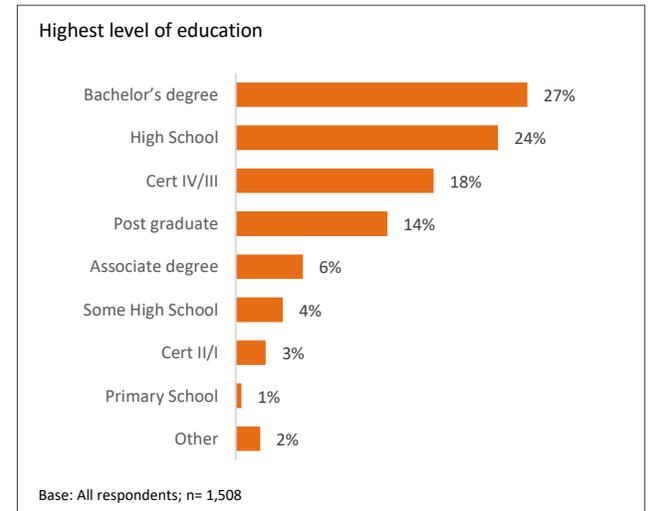
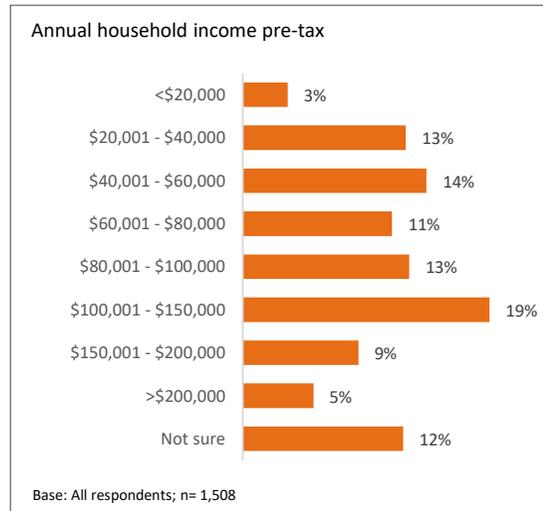
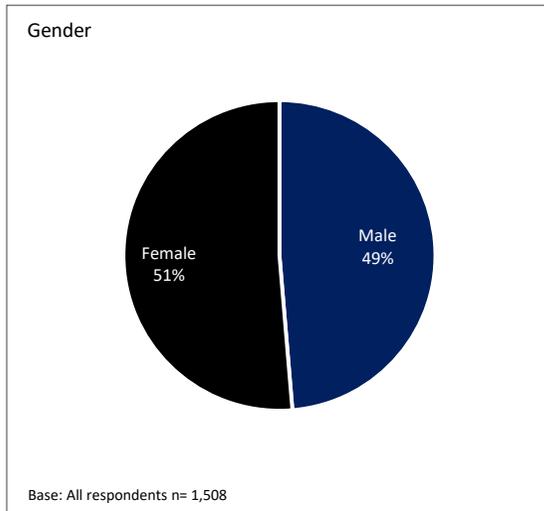
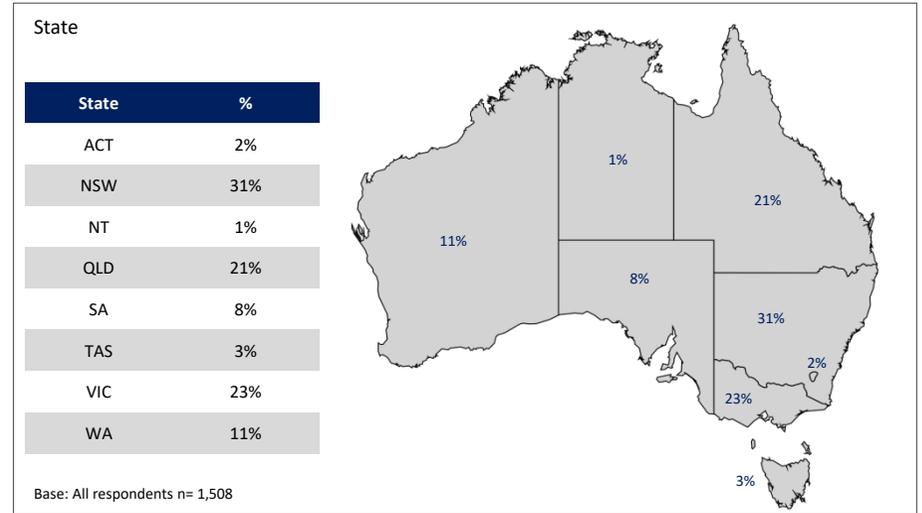
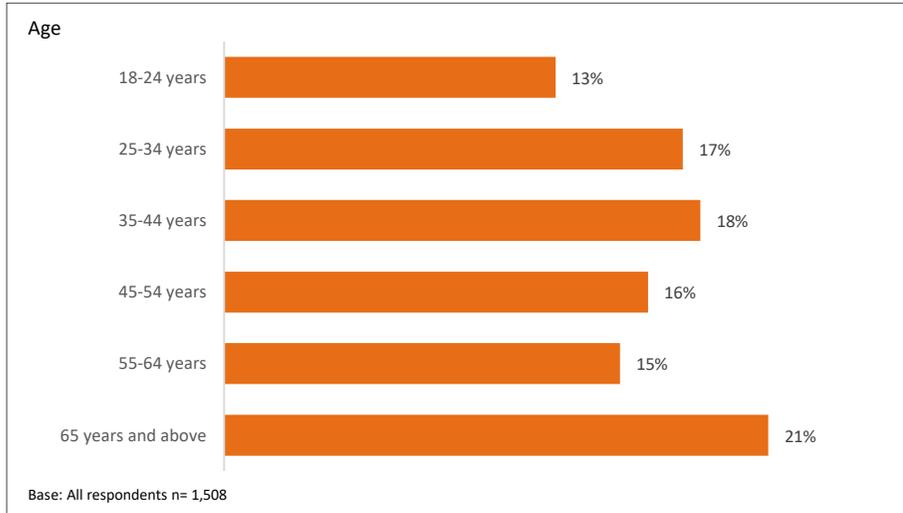


What we asked:

Now, please indicate the extent that being transparent in each of these areas builds your trust with food companies.

Respondent Profiles

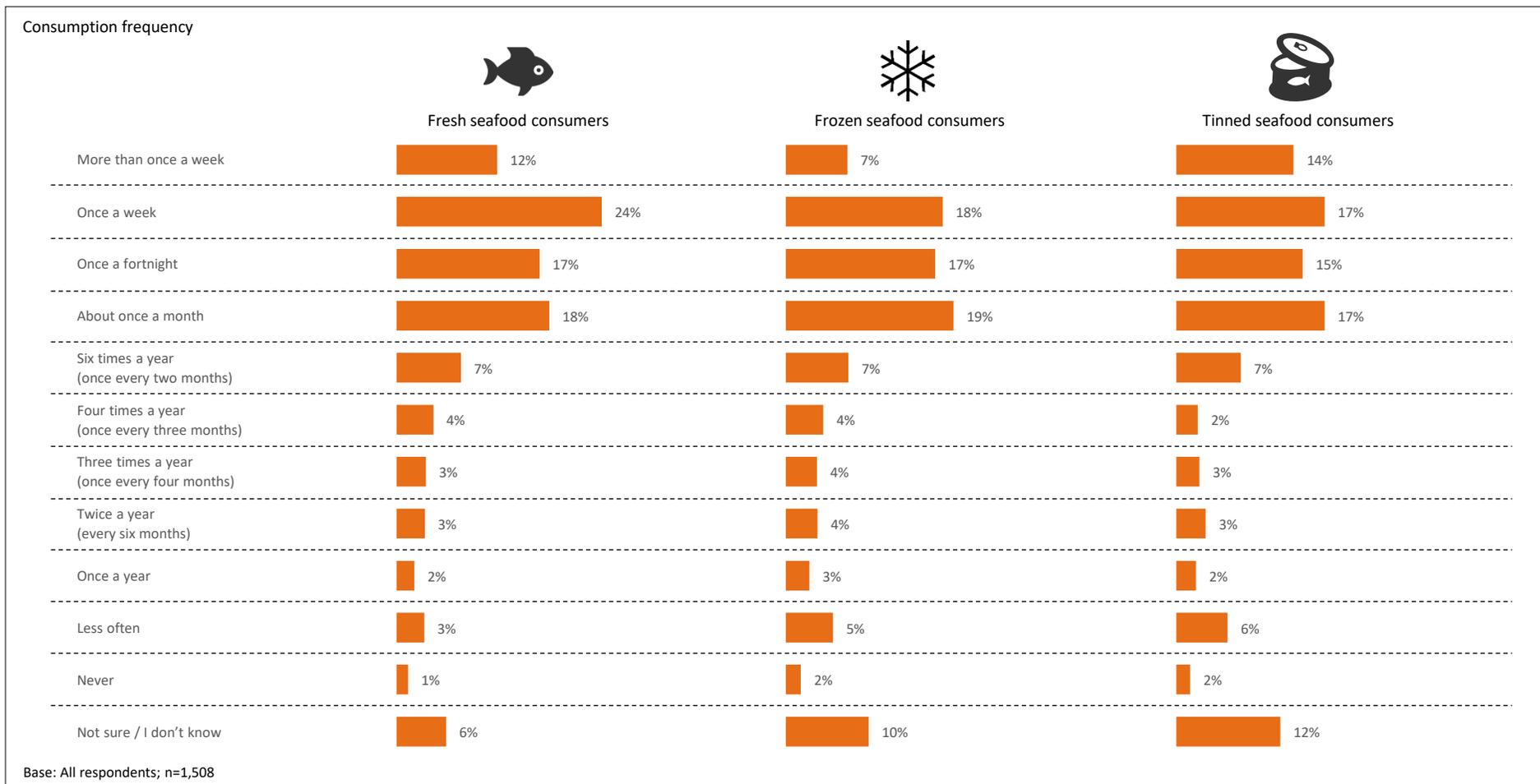
RESPONDENT PROFILES



What we asked:
 Are you...
 In which of the following age brackets do you fit?
 And what postcode do you live in?

Approximately what is your total annual household income before tax?
 What is the highest level of education you have achieved?

RESPONDENT PROFILES



What we asked:

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

Over the past 12 months, how often would you say that you have eaten **tinned fish or seafood (i.e. tinned tuna, tinned salmon, prawns or mussels)** for a main meal?

RESPONDENT PROFILES

Consumption frequency – grouped (excluding “not sure” answers)



Fresh seafood consumers



Frozen seafood consumers



Tinned seafood consumers

Frequent
(once a week or more)



37%

28%

35%

Regular
(per fortnight or per month)



36%



40%



36%

Occasional / Non-eater
(less than once a month
or not at all)



26%



32%



29%

Base: All respondents; n=1,508

What we asked:

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

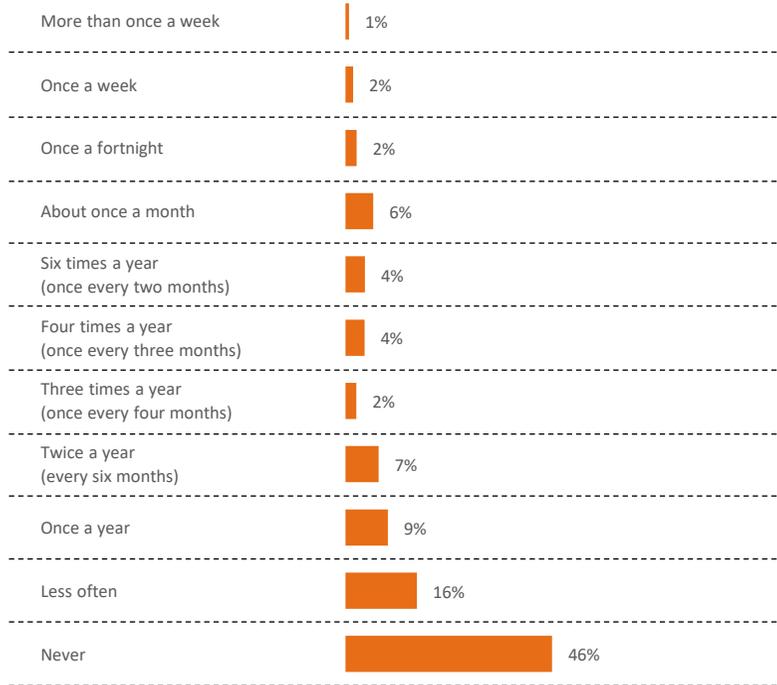
Over the past 12 months, how often would you say that you have eaten **tinned fish or seafood (i.e. tinned tuna, tinned salmon, prawns or mussels)** for a main meal?

RESPONDENT PROFILES

Fishing frequency



Recreational fishers

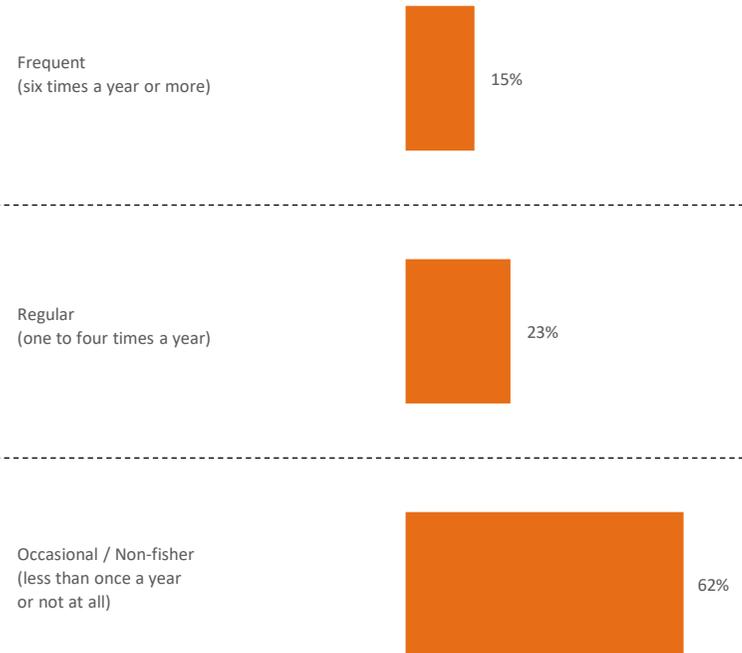


Base: All respondents; n=1,508

Fishing frequency - grouped



Recreational fishers



Base: All respondents; n=1,508

What we asked:

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.

Research Design

Research Program

In the context of the ongoing effort directed at ensuring the broader Australian community is informed about and engaged with the Australian fishing industry's progress in achieving environmental sustainability, the level of awareness and engagement stands as an important indication of success. This research aimed to gauge the community's perceptions about the achievements and ongoing investment the industry is making into achieving long term sustainability.

Methodology

An online survey was distributed via an accredited online research panel of respondents over the age of 18 years.

Sample

In total, n = 1,508 surveys were completed by participants, an increase on the n = 1,002 collected in the 2017 research. Respondent demographics from the survey were representative of ABS population estimates across age, gender and location to ensure the final results appropriately reflected the current size and structure of the Australian population.

Questionnaire

Participants were asked to complete a 10 minute online survey which covered a range of topics relating to their awareness and their thoughts about the Australian fishing Industry. These included, but were not limited to:

- Whether the industry is sustainable;
- How the fishing industry benchmarks against other countries and industries; and
- Knowledge and awareness of the efforts being made.

A range of Likert rating scale, closed and open-ended questions were used throughout the survey to accomplish this.

Timing

The online survey was launched on the 4th April 2018 and remained open until the 12th April 2018.

Definitions

Eat fresh fish or seafood; Eat frozen fish or seafood; Eat tinned fish or seafood;

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

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

Occasional / non eaters includes those who eat the specified fish or seafood less frequently or do not eat it 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.

want more information?

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