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# Tasmanian Salmonid Growers Association

## Community Research

### Executive Summary Report

October 2016





**This report has been prepared by  
Enterprise Marketing and Research Services  
60 Main Road, Moonah TAS 7009**

**All enquiries should be addressed to:**

**Samuel Paske  
Chief Operations Director**

**EMRS  
PO Box 402  
Moonah TAS 7009**

**Phone: (03) 6211 1222**

**Fax: (03) 6211 1219**

**E-mail: [sam.paske@emrs.com.au](mailto:sam.paske@emrs.com.au)**

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# Executive Summary



The Tasmanian Salmonid Growers Association (TSGA), the peak body representing salmon growers throughout Tasmania, sought to determine current perceptions and attitudes held towards the salmon industry by the Tasmanian community, as well as views relating to the expansion of the industry. The TSGA commissioned the independent Tasmanian research firm, EMRS, to gather feedback from the community via a telephone survey.

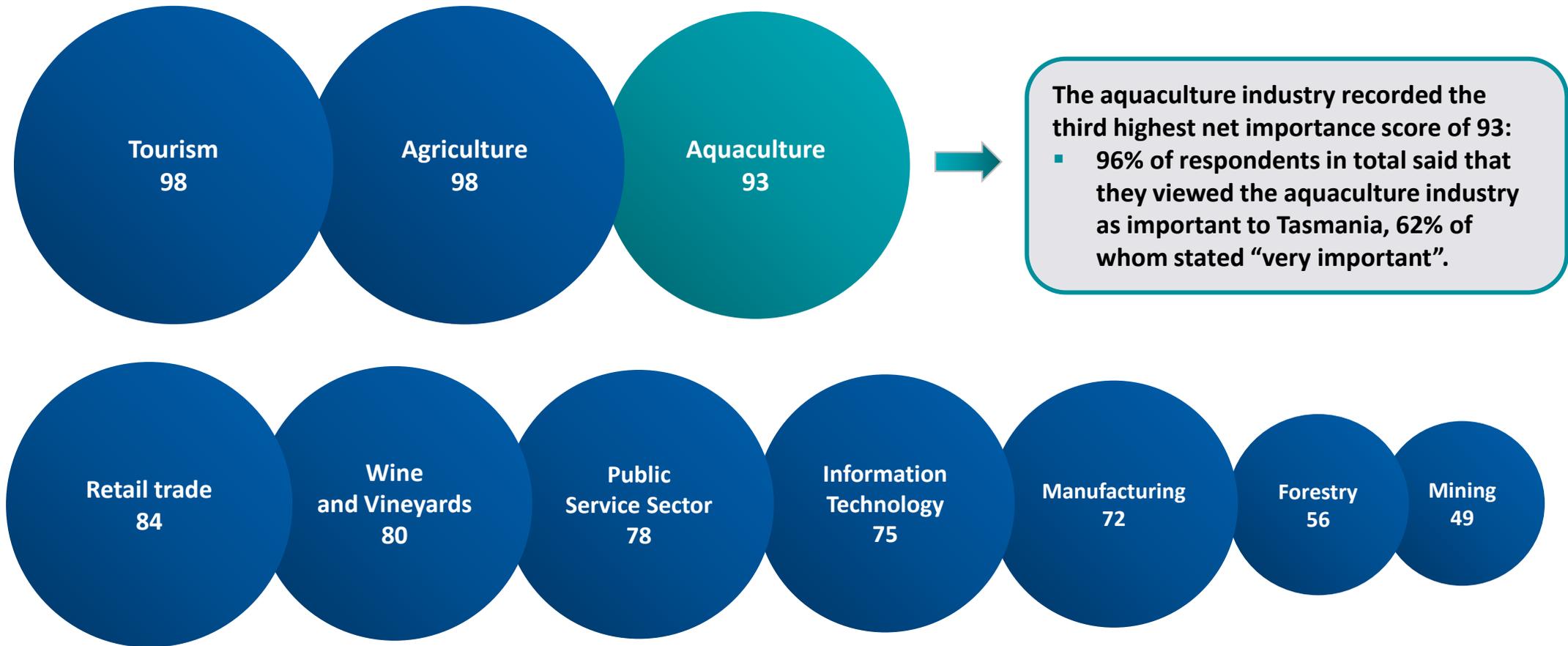
In order to collect the required information to meet the research objectives, EMRS used quantitative survey techniques, specifically the use of Computer Assisted Telephone Interviewing (CATI) and the administration of a questionnaire of around 7 minutes in length. The research was conducted in the period between the 6th and the 13th of October 2016, with a completed sample size of 600 respondents.

Interviewing was conducted in-house at EMRS, using its own CATI call centre. The target population was based on all Tasmanian residents aged 18 years and over. The achieved sample of n=600 respondents provides a confidence interval of  $\pm 4.00$  percentage points at the 95% confidence level.

To ensure the sample was representative of the Tasmanian population, quotas were put into place for age, gender and region. Where the quotas were not achieved, weighting was applied to ensure results are representative of the demographical age and gender profile of Tasmania.

## Community Ranking of the Importance of Tasmanian Industries

Respondents were asked to rate several industries on whether they were important to Tasmania generally. By subtracting the total percentage of those stating “not important” from the total of those stating “important”, a net importance score out of a maximum of 100 was arrived at for each industry.



## Reasons for Regarding the Aquaculture Industry as Important

Among respondents regarding the aquaculture industry as important, the most frequently given reasons were:



- Generates employment (32%)
- Make use of the Tasmanian water, climate and cleanliness (22%)
- Stimulates the economy (14%)
- Imports and exports (13%)
- Promotes Tasmania's reputation and image (10%)
- Quality products (10%)

## Unprompted Awareness of the Aquaculture Industry

Among the total sample of 600 respondents, the most frequently mentioned things that came to mind when thinking about the aquaculture industry were:



- Salmon/ Atlantic salmon/ smoked salmon (31%)
- Salmon and fish farms (17%)
- Oysters/ scallops/ shellfish/ mussels/ crayfish/ eel/ abalone (16%)
- Fish and sea life (14%)
- A small percentage recalled environmental damage or concerns (5%)

## Unprompted Awareness of Tasmanian Salmon Farming Companies

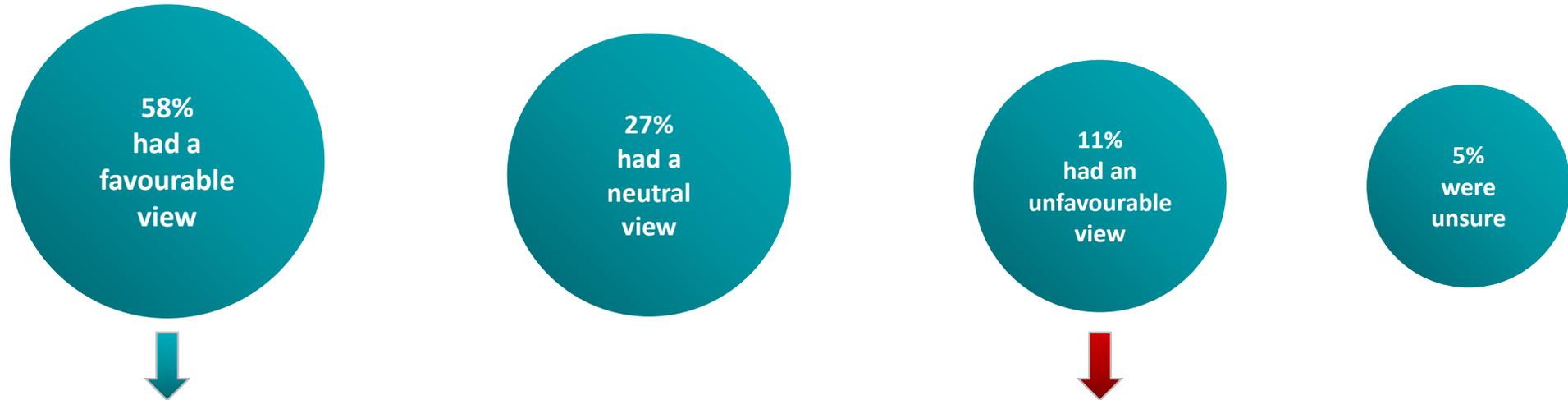
Among the total sample of 600 respondents, the most frequently mentioned companies that came to mind when thinking about salmon farming in Tasmania were:



- Tassal (66%)
- Huon Aquaculture (36%)
- Petuna Aquaculture (21%)

## Community Perceptions of the Salmon Farming Industry

All 600 respondents were asked whether they had a favourable, neutral, or unfavourable view of the salmon farming industry:



### Reasons for the Favourable View of the Salmon Farming Industry

Among the respondents who had a favourable view, the most frequently mentioned reasons were:

- Provides jobs and employment (24%)
- Important to the Tasmanian economy (17%)
- Enjoy consuming salmon (15%)
- The industry is clean, green and sustainable (14%)

### Reasons for the Unfavourable View of the Salmon Farming Industry

Among the small number of respondents who had an unfavourable view, the most frequently mentioned reasons were:

- Environmental concerns including pollution (48%)
- Concerns about what fish are fed and overcrowding (25%)

## Perceived Benefits of Salmon Farming in Tasmania

Among the total sample of 600 respondents, the most frequently mentioned benefits of the salmon farming industry in Tasmania were:



- Generates jobs and employment (64%)
- Stimulates the economy (41%)
- Promotes Tasmania's reputation (26%)
- Provides a healthy food source (22%)
- Provides a sustainable food source (21%)

## Concerns about Salmon Farming in Tasmania

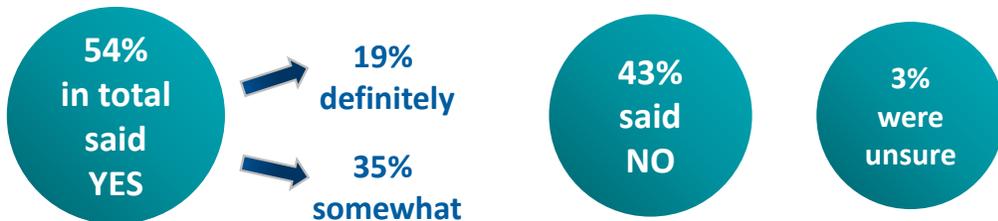
Among the total sample of 600 respondents, the single most frequently mentioned concern about salmon farming in Tasmania was:



- Creates too much waste and pollutes our waterways (35%)
- Mentioned far less frequently were:
- The use of approved chemicals and antibiotics (12%)
  - Growing too rapidly and expanding too far (9%)

## Community Understanding of the Sustainability that the Tasmanian Salmon Farming Industry Seeks to Achieve

All 600 respondents were asked if they felt they had a good understanding of the sustainability that the Tasmanian salmon farming industry seeks to achieve:



- It should also be noted that:
- A significant proportion (34%) were either unsure as to what concerned them about salmon farming in Tasmania or had no concerns.

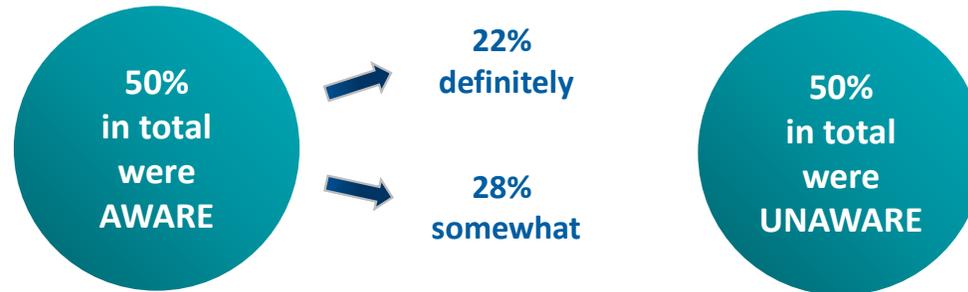
## Community Agreement with Key Statements about the Salmon Farming Industry

All 600 respondents were read several statements about the salmon farming industry and asked their level of agreement. By subtracting the total percentage of those who “disagreed” from the total of those who “agreed”, a net agreement score of a maximum of 100 was arrived at for each statement.

- Farmed salmon promotes Tasmania’s reputation as a quality provider of fine foods = 92
- Farmed salmon has significant economic benefits for the State = 90
- Salmon farming provides important training and employment opportunities for local communities = 89
- There should be strong controls on the industry to protect the environment = 84
- Overall, Tasmania's salmon farming industry is well regulated = 50
- Wild fish used to supply salmon feed impacts on the sustainability of salmon farming and marine fish stocks = 19
- Salmon farming has minimal impact on the Tasmanian environment = 17
- Salmon farming creates too much waste and pollutes Tasmanian waterways = -14
- The salmon farming industry is expanding too rapidly = -18

## Community Awareness of the Expansion Plans for the Tasmanian Salmon Farming Industry

All 600 respondents were asked if they were aware of any of the expansion plans for the Tasmanian salmon farming industry:



## Level of Community Support for the Expansion of the Salmon Farming Industry

All 600 respondents were then asked their level of support for the expansion of the salmon farming industry in Tasmania:



## Reasons for Supporting the Expansion of the Salmon Farming Industry

Among the respondents who stated that they supported the expansion of the salmon farming industry in Tasmania, the most frequently given reasons were:



- Employment (39%)
- Good for the economy and exports (18%)
- It is an important growth industry (15%)
- As long as it is regulated and controlled (10%)
- If the environmental impact is monitored (7%)

## Reasons for Opposing the Expansion of the Salmon Farming Industry

Among respondents who stated that they opposed the expansion of the salmon farming industry in Tasmania, the most frequently given reason by far was:



- The environmental impact and pollution (40%)
- Other less frequent responses were:
- Unhappy with expansion plans and locations (13%)
  - Expanding too rapidly (9%)
  - Should go further offshore (8%)
  - Needs regulation and control (7%)