

Seafood Survey: Public Opinion on Aquaculture and a National Aquaculture Act

A survey of 1,200 Canadians

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Prepared for: Canadian Aquaculture Industry Alliance (CAIA)

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Contents

1.0	Executive Summary	3
1.1	Key Findings	3
2.0	Research Problem and Objectives	4
3.0	Consumer Profile.....	5
3.1	Fish and Seafood Consumption	5
3.2	Reasons for Eating Fish and Seafood	7
3.3	Preference for Wild or Farmed Salmon	8
3.4	Message Testing on Location and Availability of Food	9
4.0	Industry Comparisons	11
4.1	The Fish and Shellfish Farming Industry	12
5.0	The Aquaculture Industry in Canada	13
5.1	Assessing the Debate around Aquaculture	16
6.0	A National Aquaculture act.....	20
6.1	Confidence in Federal Government to Regulate Aquaculture.....	20
6.2	Support/Opposition to National Aquaculture act	22
7.0	Political Implications	26
8.0	Conclusion	29
9.0	Methodology.....	30
10.0	Survey Questionnaire.....	31

1.0 Executive Summary

Abacus Data's survey of 1,200 Canadians over the age of 18 demonstrated a national consensus exists on the creation of a national aquaculture act. Over eight in ten Canadians surveyed (81%) either strongly or somewhat supported the development of a single, national aquaculture act. This support is driven mainly by the public's backing for the industry as well as concerns about the safety of farmed finfish and shellfish.

1.1 Key Findings

- **Canadians, on average, eat fish at least three times per month; shellfish two times per month.**
 - A large majority of Canadians (88%) have eaten fish or seafood in the past three months.
 - On average, Canadians eat finned fish 3.7 times a month.
 - Shellfish is eaten 1.9 times per month, on average.
 - Salmon is the most popular kind of fish consumed.
 - The most common reason cited by respondents for eating fish is because of its health benefits.
- **Canadians are more likely to prefer wild salmon, but one in three have no preference.**
 - 46% of Canadians said they prefer to buy wild salmon, while 5% prefer farmed. One-third of respondents do not have a strong preference either way.
- **A majority of Canadians are familiar with the aquaculture industry.**
 - Over eight in ten (84%) Canadians said they were aware of fish farming.
 - The coastal provinces were the most familiar with the aquaculture industry, whereas familiarity decreased moving towards the centre of the country.
- **Most Canadians have a positive or neutral impression of the aquaculture industry.**
 - Two in five Canadians said they have a positive impression of the aquaculture industry compared to 29% who had a negative impression.
- **Eight in ten Canadians (81%) support a national aquaculture act.**
 - Support was highest in Quebec (86%) and Alberta (83%).
 - The most frequently cited reasons for support included the need for safe food products and national standards.

2.0 Research Problem and Objectives

The aquaculture industry is important to the Canadian economy. Aquaculture generates \$2.1 billion a year for Canada's economy and employs 14,500 Canadians in many rural and coastal communities in seven provinces.

Currently there are 73 separate pieces of legislation governing the aquaculture industry, some of them contradictory.

This report assesses Canadian attitudes towards the aquaculture industry, farmed fish products, and support for a national aquaculture act.

Study Objectives

The objectives of this study are to:

1. Assess Canadian fish and seafood consumption and preferences;
2. Examine opinions about national aquaculture legislation and the role the federal government can play in regulating the industry;
3. Understand the political implications of supporting the aquaculture industry and a national aquaculture act.

3.0 Consumer Profile

3.1 Fish and Seafood Consumption

The consumption of fish and seafood is close to universal in Canada. Almost nine in ten respondents (88%) said they have eaten fish or seafood in the past three months. Only 12% said they have not eaten any fish or seafood in the previous three months.

**Table 3.0: Number of Times Respondent Eats Finfish per Month
(n=1,215, weighted)**

	<i>Canada</i>	<i>Atlantic</i>	<i>Quebec</i>	<i>Ontario</i>	<i>Central</i>	<i>Alberta</i>	<i>B.C.</i>
Zero times	5%	6%	6%	5%	3%	3%	5%
1 to 5 times	77%	80%	77%	76%	82%	87%	73%
6 to 10 times	15%	13%	14%	16%	14%	8%	20%
Over 10 times	3%	1%	3%	3%	2%	2%	4%
Mean	3.70	3.17	3.72	3.74	3.91	3.03	4.23

	<i>Canada</i>	<i>18-29</i>	<i>30-59</i>	<i>60 +</i>	<i>Men</i>	<i>Women</i>	<i>Immigrants</i>
Zero times	5%	9%	5%	3%	4%	6%	5%
1 to 5 times	77%	78%	78%	76%	77%	78%	73%
6 to 10 times	15%	9%	15%	20%	17%	13%	20%
Over 10 times	3%	5%	2%	2%	3%	3%	2%
Mean	3.70	3.50	3.68	3.85	3.82	3.58	3.91

A majority of Canadians (77%) say they eat finfish one to five times per month, while 15% eat it six to ten times per month. On average, Canadians eat finfish 3.70 times a month.

Regionally, British Columbians were more likely to eat finfish six to ten times per month (20%) than other Canadians and have the highest average consumption per month (4.23 times/month). Older Canadians eat finfish more often than younger Canadians while immigrants eat finfish more often than Canadian-born respondents besting the national average by 0.21 times per month (3.91 compared to 3.70).

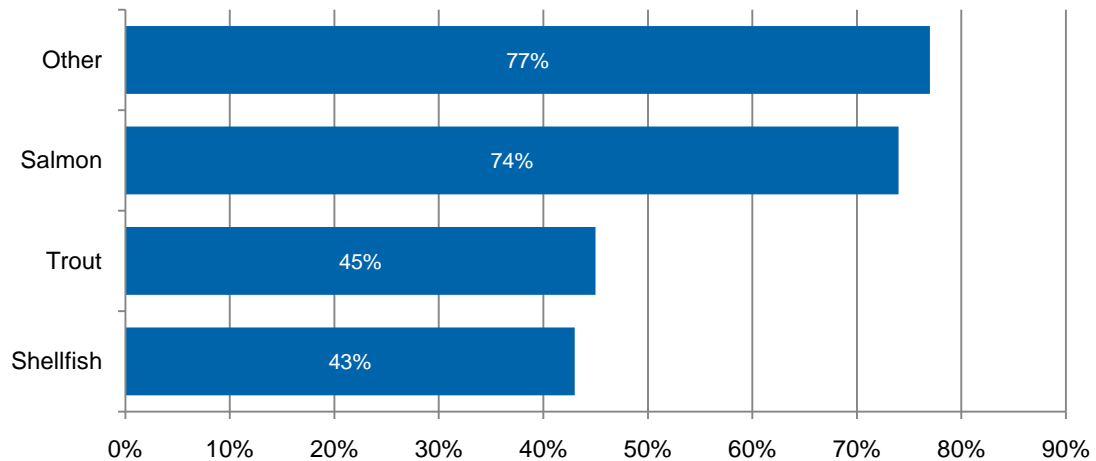
**Table 3.1: Number of Times Respondent Eats Shellfish per Month
(n=1,215, weighted)**

	<i>Canada</i>	<i>Atlantic</i>	<i>Quebec</i>	<i>Ontario</i>	<i>Central</i>	<i>Alberta</i>	<i>B.C.</i>
Zero times	24%	39%	17%	27%	27%	22%	20%
One time	30%	27%	29%	29%	36%	35%	28%
Two times	21%	12%	24%	22%	25%	15%	18%
3 to 5 times	21%	19%	25%	19%	12%	24%	22%
Over 5 times	5%	4%	6%	4%	-	4%	12%
Mean	1.93	1.49	2.24	1.72	1.32	1.97	2.41

	<i>Canada</i>	<i>18 to 29</i>	<i>30 to 59</i>	<i>60 +</i>	<i>Male</i>	<i>Female</i>	<i>Immigrant</i>
Zero times	24%	26%	24%	22%	25%	23%	25%
One time	30%	32%	29%	29%	29%	30%	24%
Two times	21%	19%	21%	20%	17%	24%	21%
3 to 5 times	21%	19%	20%	24%	24%	18%	24%
Over 5 times	5%	4%	6%	5%	6%	5%	7%
Mean	1.93	1.74	1.97	1.97	2.02	1.84	2.03

The survey found that Canadians consume shellfish less often than finfish, with one quarter (24%) saying they never eat it, one third (30%) eating it once per month, and one in five (21%) eating it two to five times per month. Nationally, shellfish is eaten 1.93 times per month, on average. With the exception of British Columbians (12%), less than 5% of the population eats shellfish more than five times a month. On average, British Columbians and Quebecers eat shellfish more often per month, while Atlantic and Central Canadians eat it the least often. Similar to finfish, older Canadians eat shellfish more often than millennials (aged 18 to 29).

Figure 3.0 What types of fish/seafood do you eat?
[Select all that apply]
(n=1,215, weighted)



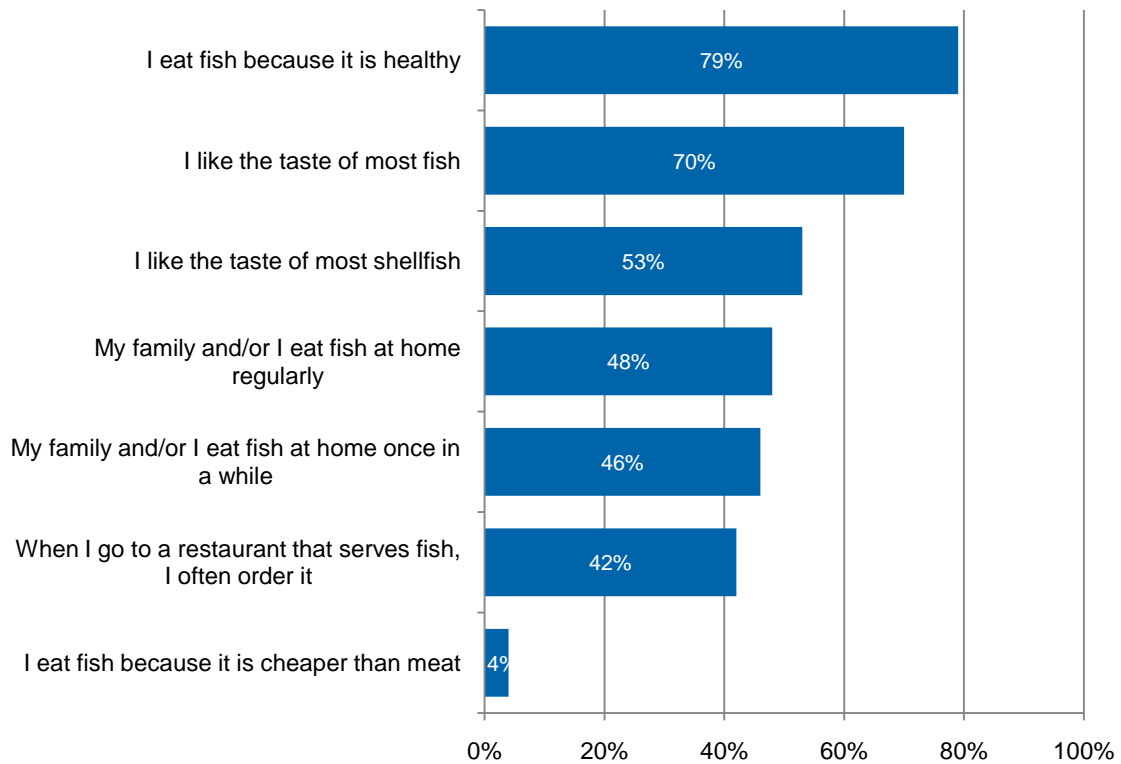
Three-quarters of respondents who had eaten fish in the past three months said they eat salmon (74%) and other kinds of fish (77%). About four in ten Canadians say they eat trout (45%) and shellfish (43%).

3.2 Reasons for Eating Fish and Seafood

According to Canadians, the most frequently cited reason for eating fish was because it is healthy (79%). Taste was also an important factor; seven in ten said they like the taste of most fish (70%), while half of respondents said they like the taste of most shellfish (53%). Men are more likely to say they like the taste of fish compared to women (73%, 66%, respectively).

Almost half of Canadians (48%) reported eating fish regularly at home, while 42% say they often order fish when out at a restaurant. Women (47%) are more likely than men (38%) to order fish at a restaurant, as are older Canadians (59%).

Figure 3.1 Why do you eat fish?
 [Select all that apply]
 (n=1,215, weighted)

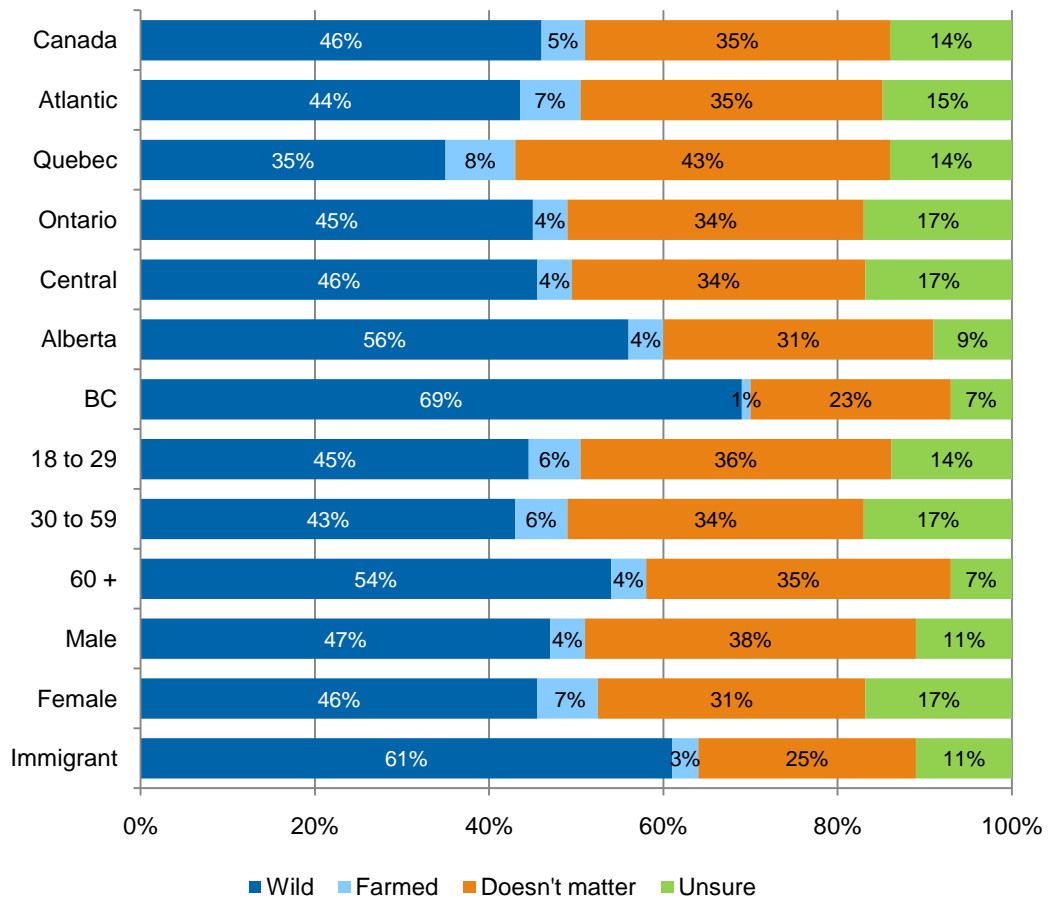


3.3 Preference for Wild or Farmed Salmon

When asked to state their preference between wild or farmed salmon, 46% of Canadians said they prefer to buy wild salmon, while 5% prefer farmed. However, one-third of respondents do not have a strong preference either way.

Preferences vary significantly between regions. Almost seven in ten British Columbians (69%) prefer wild salmon, forming the group most likely to hold this preference; on the other hand, just 35% of Quebecers chose wild salmon over farmed, with 43% saying it doesn't matter which one they eat. Albertans were also likely to prefer wild salmon (56%). Older Canadians (60+) were more likely than those younger than them to have a preference for wild salmon (54% vs. 18-29, 45% and 30-59, 43%).

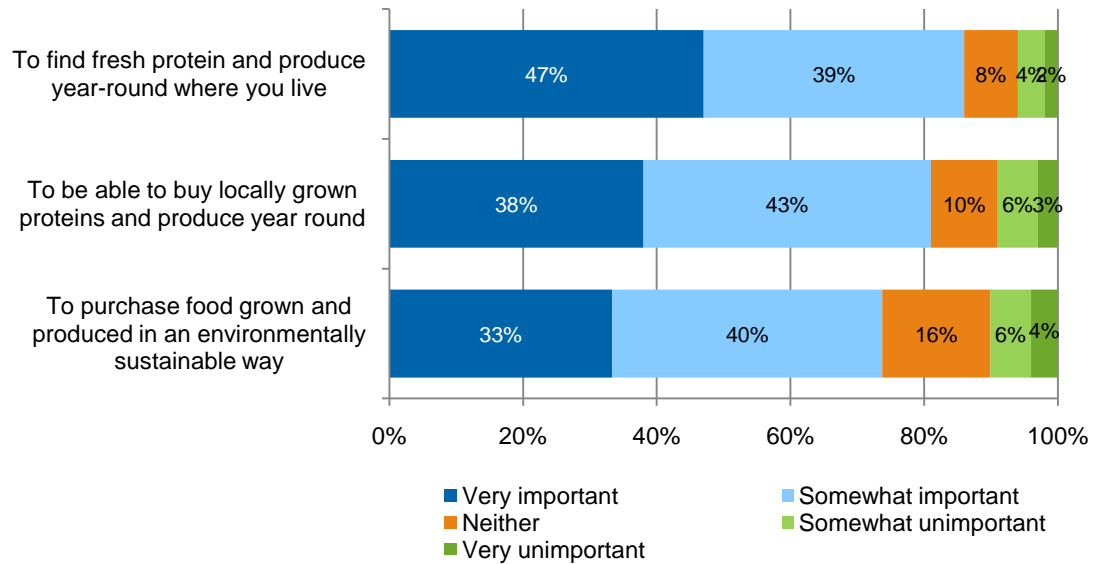
Figure 3.2 If you were to buy fresh or frozen salmon, do you prefer to buy....
(n=1,215, weighted)



3.4 Location and Availability of Food

In general, access to fresh protein and produce all year was important to over four in five Canadians (47% very important, 39% somewhat important). Respondents also said having the ability to buy locally grown protein and produce year round was highly important (38% very important, 43% somewhat important). Food produced sustainably was less important than access to fresh or local food; however, a large majority of respondents (73%) still rated environmental sustainability as either very or somewhat important.

Figure 3.3 Please tell us whether each statement is important or not important to you when deciding what type of food to buy. (n=1,215, weighted)



Older Canadians were slightly more likely than millennials to view access to fresh food year round as important (88%, 82% respectively). Across the country, Quebecers were the most likely to say being able to get fresh protein and produce all year was important (91%).

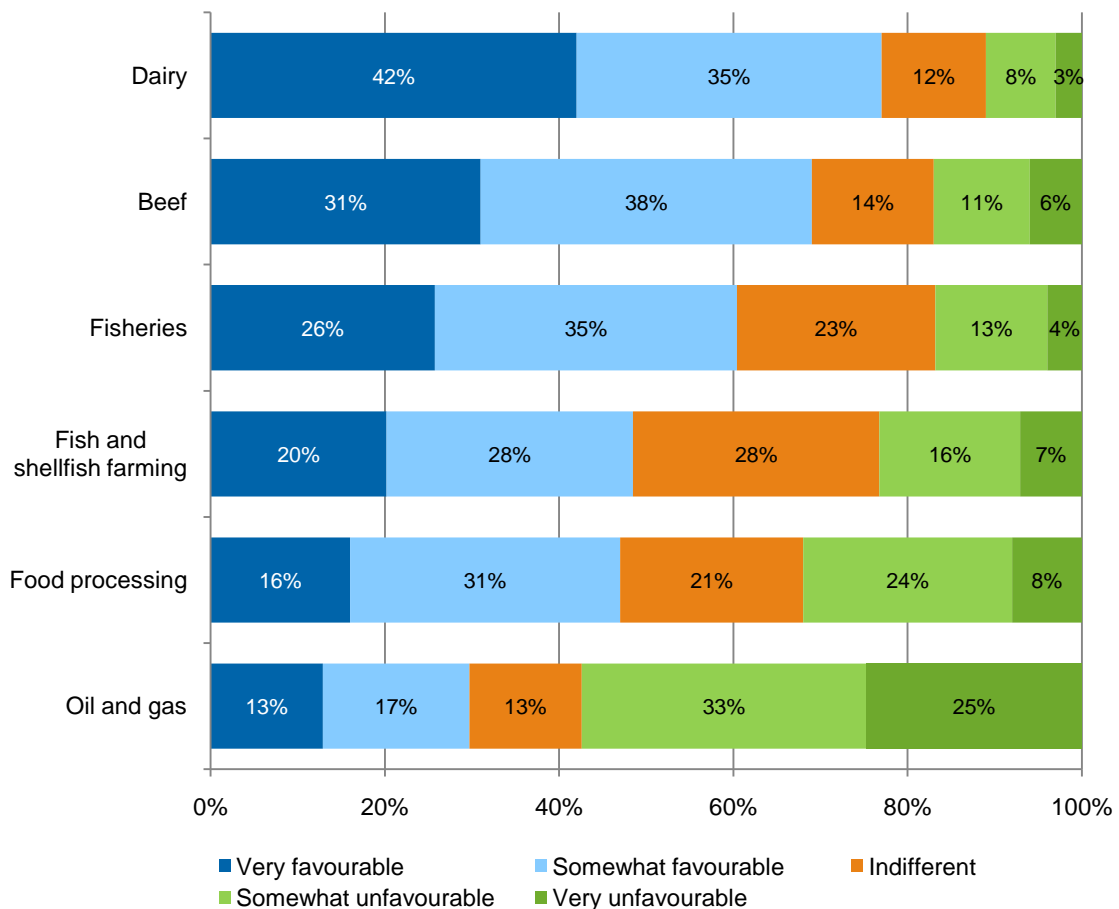
The availability of locally grown protein and produce was more important to seniors (87%) than to millennials (71%). Women (87%) also placed more importance on locally produced food than men (75%).

British Columbians (83%) were the most likely to say that food produced in an environmentally sustainable way was important to them compared with Ontarians (74%) and Quebecers (61%). Women were more likely than men to believe that environmental sustainability was important in how their food is grown (women 76%, men 70%).

4.0 Industry Comparisons

Respondents were presented with a list of occupations and asked to rate their level of respect towards each.

Figure 4.0 Below is a list of industries. Thinking about the reputation of the industry, its importance to the Canadian economy, and the impact it has on your own life, please tell us whether you have a favourable or unfavourable impression of each.
(n=1,



The most favourable industry was dairy (77%), followed by beef (69%) and fisheries (61%). Respondents gave fish and shellfish farming the same level of favourability as food processing (48%, 47%, respectively). It is noteworthy that aquaculture had the highest percentage of indifference (28%), which may be attributed to less knowledge about the industry.

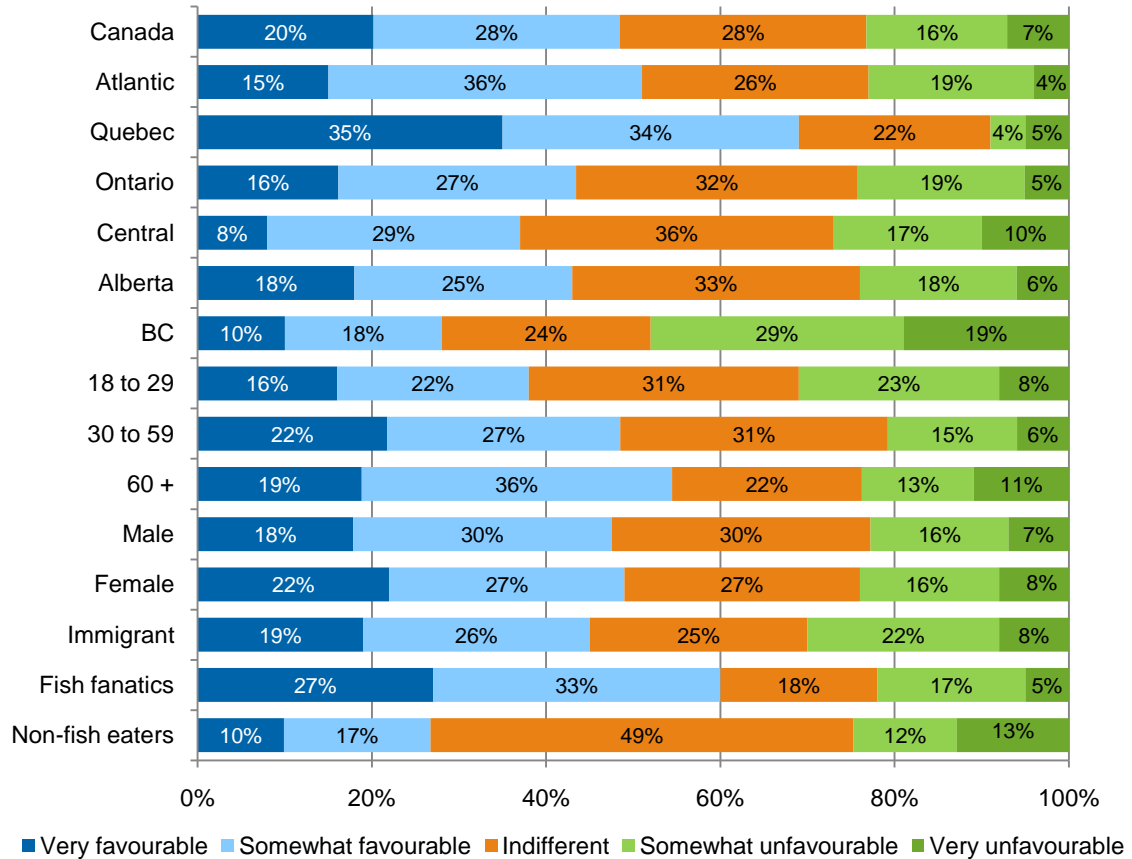
4.1 The Fish and Shellfish Farming Industry

Looking specifically at the aquaculture industry, there are significant differences across Canada and among demographic groups. Quebecers (69%) and Atlantic Canadians (51%) had the most favourable impression of aquaculture. British Columbians, in contrast, were the least likely to have a favourable impression of the industry.

Ontarians, Albertans, and Central Canadians have a more favourable than unfavourable impression, but they are also more likely to be indifferent. Almost one in two respondents in B.C. (48%) had an unfavourable impression of the industry. Favourability for the industry increases with age; a majority of seniors (55%) hold a favourable view compared to 38% of millennials.

Also of note, respondents who eat fish and shellfish more frequently (fanatics) had a more favourable impression of the industry than casual and non-fish eaters (fanatics 60% favourable, non-fish eaters 27% favourable).

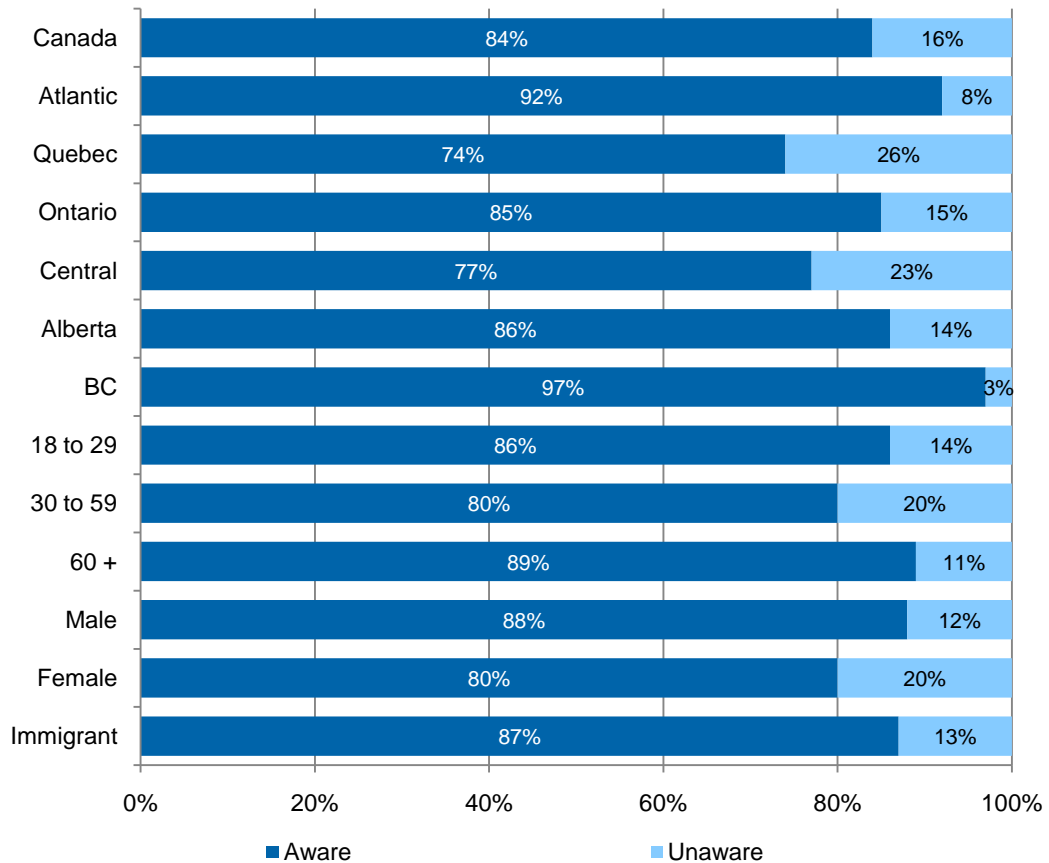
**Figure 4.1 Favourability: Fish and shellfish farming industry
(n=1,215, weighted)**



5.0 The Aquaculture Industry in Canada

Prior to asking about the aquaculture industry, we asked respondents if they were aware that seafood is farmed for human consumption in Canada. Overall, over eight in ten (84%) Canadians were aware of fish farming, while 16% were unaware.

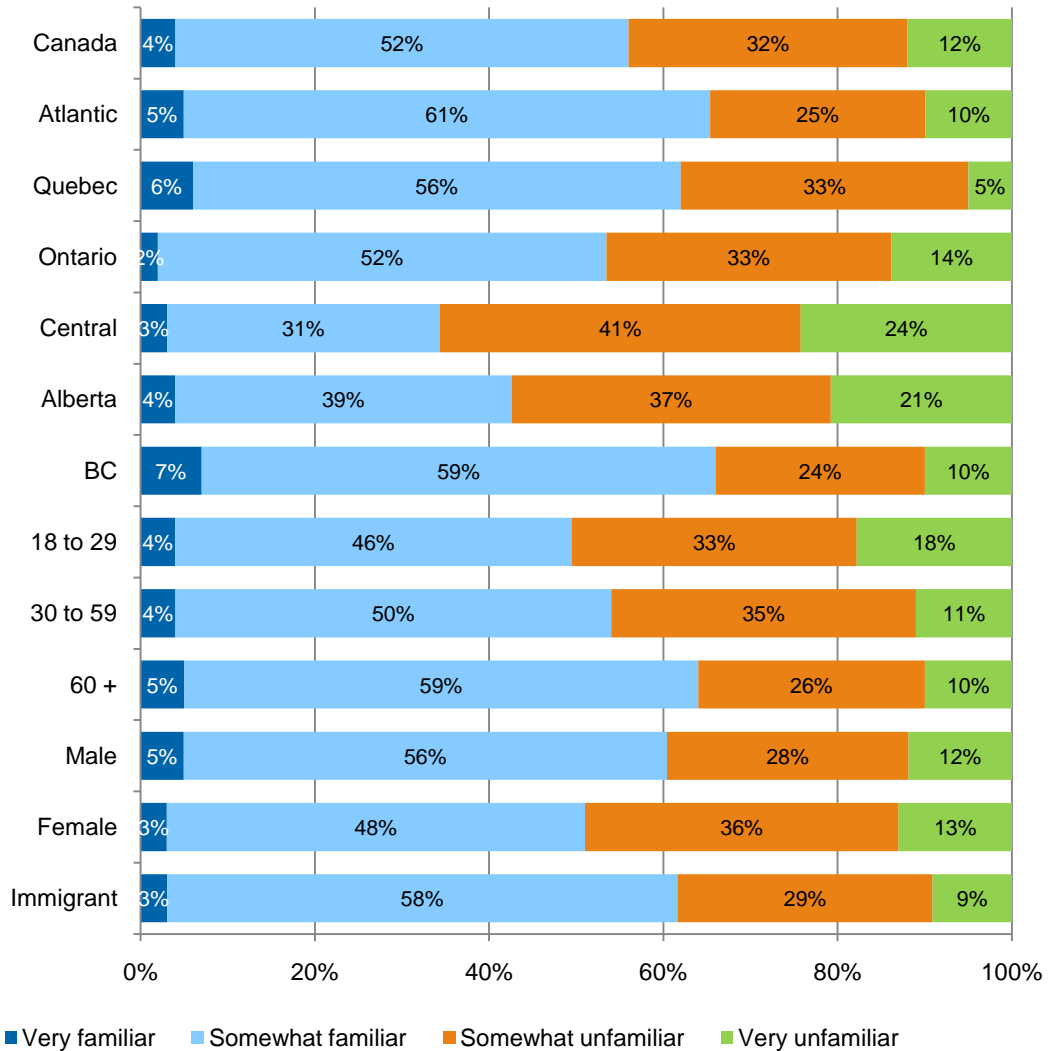
Figure 5.1 Before today, were you aware or unaware that fish and shellfish are farmed for human consumption in Canada?
(n=1,215, weighted)



Regionally it comes as no surprise that almost all British Columbians (97%) and Atlantic Canadians (92%) know fish are farmed. However, over three-quarters of the rest of Canadians are aware of this fact, with Quebecers (74%) and Central Canadians (77%) being the least aware. Men (88%) are slightly more aware than women (80%).

Respondents who were aware fish is farmed were then asked to state how familiar or unfamiliar they are with the Canadian aquaculture industry. A slight majority of Canadians (56%) said they were familiar with the industry (4% very familiar, 52% somewhat familiar) while four in ten (44%) said they were unfamiliar (12% very unfamiliar, 32% somewhat unfamiliar).

**Figure 5.2 How familiar or unfamiliar would you say you are with the aquaculture industry in Canada?
[if aware fish is farmed]
(n=1,016, Aware Only, weighted)**

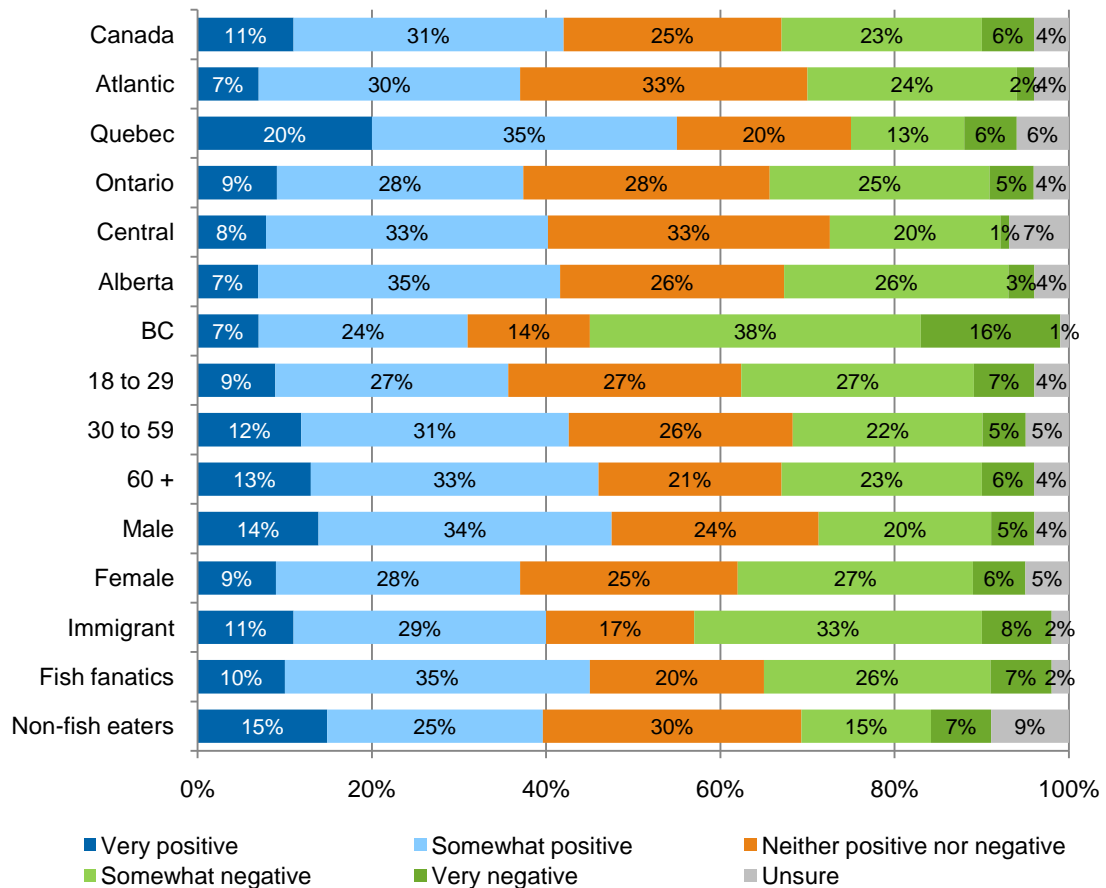


The coastal provinces were the most familiar with the aquaculture industry in Canada (BC 7% very familiar, 59% somewhat familiar; Atlantic 5% very familiar, 61% somewhat familiar). Familiarity decreased moving from the coasts to the centre of the country; Central Canadians were the most unfamiliar (24% very unfamiliar, 41% somewhat unfamiliar). Interestingly, as age increased, so did the likelihood to be more familiar with the aquaculture industry. Men (61%) were slightly more familiar than women (51%).

5.1 Assessing the Debate around Aquaculture

In order to determine whether respondents were in favour or opposed to the practice of fish farming we presented them with the two sides of the debate around aquaculture and fish farming in Canada.

Figure 5.3
Based on the information you read on the last page, and what you've heard in the past, do you have a positive or negative impression of the aquaculture industry?
(n=1,215, weighted)



On the whole, two in five Canadians (42%) said they have a positive impression of the aquaculture industry (11% very positive, 31% somewhat positive) compared to the 29% who had a negative impression (6% very negative, 23% somewhat negative).

Regionally, Quebecers (55%) were the most likely to have positive impressions of the industry (20% very positive, 35% somewhat positive) while British Columbians (54%) were most likely to have negative impressions (16% very negative, 38% somewhat negative). In the other provinces, respondents had a slightly more positive impression than negative.

Younger Canadians' (18-29 years old) impressions were split between positive (36%), negative (34%), and indifference (27%). Moreover, the likelihood of having a positive impression increases slightly as the age of the respondent increases. Survey research also found that men are more likely to have a positive impression (14% very positive, 34% somewhat positive) than women (9% very positive, 28% somewhat positive).

We asked each respondent why they hold their view and some themes emerged from the responses.

The most frequently mentioned response from Canadians holding a positive impression of the aquaculture industry is that it helps overfishing by rebuilding the wild fish stocks. Respondents also mentioned that the practice was sustainable. A number of people mentioned economic benefits, such as the creation of jobs and general support of the Canadian economy. A variety of respondents noted that the arguments listed in favour of the industry were better and more believable than the arguments listed for those opposed.

It is interesting to note that 8% of respondents who had a very positive impression gave fresh, year-round fish as their reason, whereas only 3% of those with a somewhat favourable impression gave this reasoning. As well, of those with a very positive impression, very few responded that aquaculture provides for future needs, while it was the response of 11% of respondents holding a somewhat positive view.

Very Positive		Somewhat Positive	
Helps overfishing (fish stocks) / Sustainable	28%	Helps overfishing (fish stocks) / Sustainable	22%
Other	19%	Other	20%
Creates jobs / Helps Canadian economy	17%	Pro arguments better / Don't believe the con arguments	14%
Pro arguments better / Don't believe the con arguments	12%	Creates jobs / Helps Canadian economy	13%
No answer	9%	Will provide for future needs (food supply)	11%
Fresh, year-round fish	8%	No answer	10%
More controls / Safer / Healthier	7%	More controls / Safer / Healthier	4%
		Fresh, year-round, affordable fish	3%
		Farmed is farmed	3%

Almost one-third of Canadians (30%) who had neither a positive or negative impression of the aquaculture industry said it was because they saw positives and negatives in both sides of the debate.

One in five (20%) said they needed more information or that they didn't know enough about the issue to form an opinion.

Neither	
Positives and negatives in both sides	30%
Other	23%
Need more information / Don't know enough	20%
No answer / Unsure	14%
Not interested in issue / Don't care	8%
Both (farmed and wild) have their place	5%

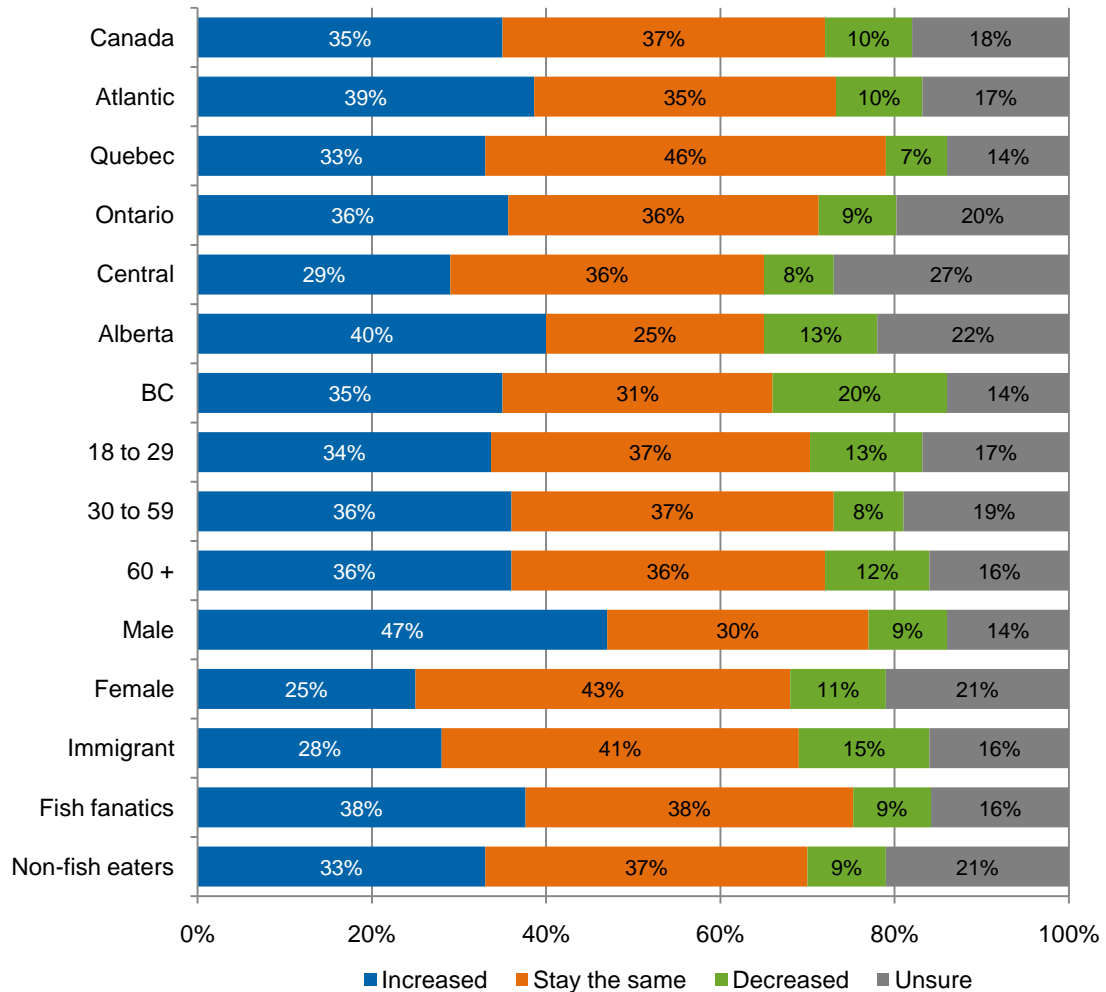
For respondents who said they had a negative view of the aquaculture industry the most mentioned reason was concern about environmental risks or impact. Along similar lines, many said they hold a negative view because of disruption or harm to wild stocks. Others were worried about chemicals or antibiotics that are used on the fish or felt that the practice of farming fish was not natural.

Very Negative		Somewhat Negative	
Environmental risks or impact	25%	Environmental risks or impact	21%
Disruption or harm to wild stocks	23%	Other	21%
Other	14%	Disruption or harm to wild stocks	20%
Not natural	12%	Chemicals / Antibiotics / Feed	13%
Chemicals / Antibiotics / Feed	11%	Not natural	7%
Sceptical of big industry	6%	Sea lice / Disease	7%
Lack of regulation / Trust in the industry	5%	Wild is better / Healthier	6%
		No answer	5%

Respondents were then asked whether aquaculture production in Canada should be increased, decreased, or stay in same, if it was done in an environmentally sustainable way. Overall, 35% of Canadians surveyed preferred an increase in production, while 37% want it to stay at the same level. Only one in ten (10%) said they wanted production to decrease.

There were some differences across the country: Albertans (40%) and Atlantic Canadians (39%) were the most likely to want an increase, whereas almost half of Quebecers (46%) favor no change in production. The other provinces were fairly split between increased and status quo. While there was no difference between age groups, men were significantly more likely to favor increased production (47%) compared to women (25%) – 43% of women prefer production to stay in the same.

**Figure 5.4: Do you think that aquaculture production in Canada should be increased, decreased, or stay the same if it is done in an environmentally sustainable way?
(n=1,215, weighted)**



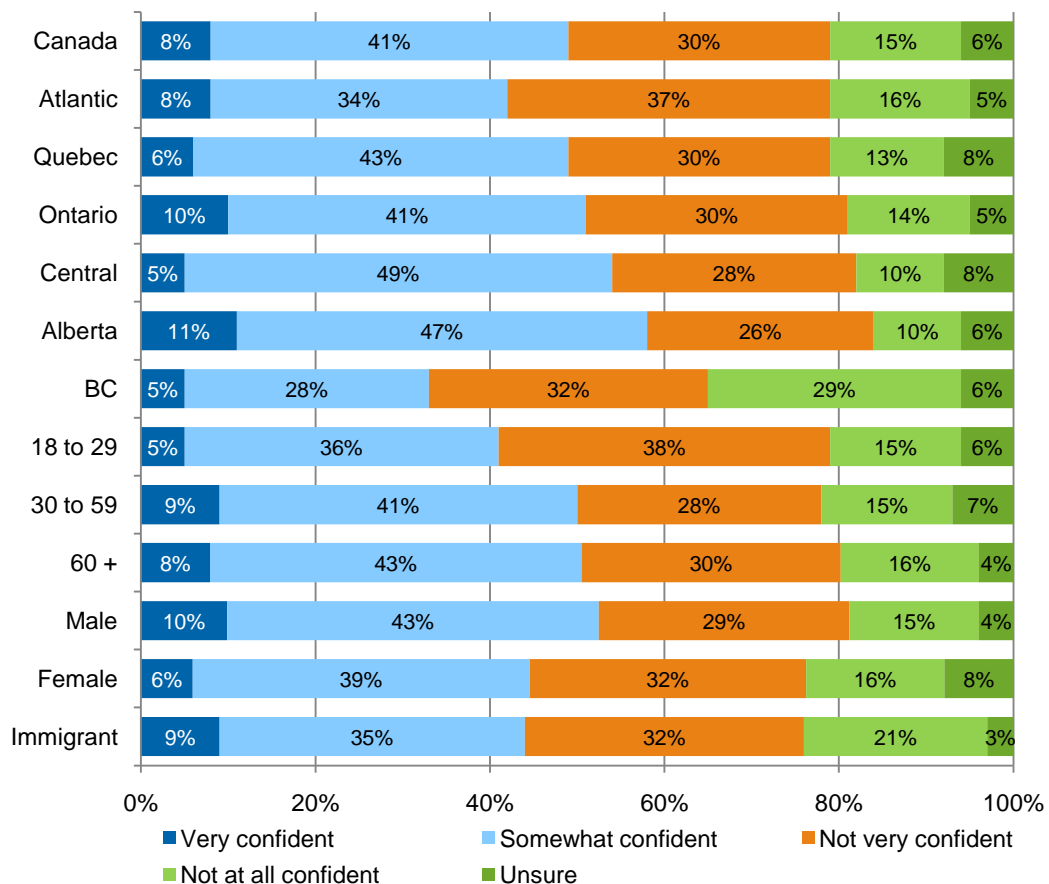
6.0 A National Aquaculture act

6.1 Confidence in the Federal Government to Regulate Aquaculture

Respondents were asked how much confidence they have in the federal government's ability to regulate the aquaculture industry and ensure that the fish and seafood produced is safe for consumption and

environmentally sustainable. Overall, almost half of respondents (49%) said they had confidence in the government (8% very confident, 41% somewhat confident), whereas the other half (45%) were not confident in the government's abilities (15% not at all confident, 30% not very confident).

Figure 6.0
All things considered, how much confidence do you have in the federal government to regulate the aquaculture industry and ensure that the fish and seafood produced is safe for consumption and environmentally sustainable?
 (n=1,215, weighted)



With the exception of B.C., confidence increased as we moved from Eastern to Western Canada. British Columbians (61%) were the most likely to say they are not confident (32% not very confident, 29% not at all confident) in the federal government's ability to regulate the aquaculture industry.

Younger Canadians (18-29 years) are slightly more likely to not have faith in the government (38% not very confident, 15% not at all confident) compared to those older than them. Men are slightly more likely to be confident in the government than women (53% men, 45% women).

It should also be noted that this survey was conducted in the midst of a federal election campaign and so political considerations may influence evaluations of the government's performance. The survey data indicates a relationship exists between party preference and confidence in the federal government. Not surprisingly, supporters of the opposition parties were far less likely to say they have confidence in the federal government to regulate aquaculture.

6.2 Support/Opposition to National Aquaculture act

Prior to gauging support or opposition to a national aquaculture act, respondents were given the following information:

Currently, the Canadian aquaculture industry is governed by up to 73 pieces of often conflicting legislation making Canada's aquaculture industry one of the most over-regulated in the world.

As well, Canada is the world's only major farmed seafood producing country without national legislation specifically designed to govern and enable its aquaculture industry. In response, the aquaculture industry has proposed the creation of a national aquaculture act that would bring all these rules into one law.

Respondents were then asked whether they supported or opposed the creation of a national aquaculture act.

The survey found that a majority of Canadians (81%) support the creation of a national aquaculture act (40% strongly support, 41% somewhat support) while only 4% oppose one. Support was highest in Quebec (86%) and Alberta (83%). Nevertheless, national legislation on aquaculture had the support of at least three quarters of residents in every region of the country. There is a real, national consensus supporting such a piece of legislation.

Among Canadians we consider fish fanatics (those who eat fish regularly and like the taste of it), support for a national aquaculture act was even more intense. Forty-seven percent of fish fanatics strongly support the creation of a national act while another 39% somewhat support the legislation.

Figure 6.1
Do you support or oppose the creation of a national aquaculture act?
 (n=1,215, weighted)

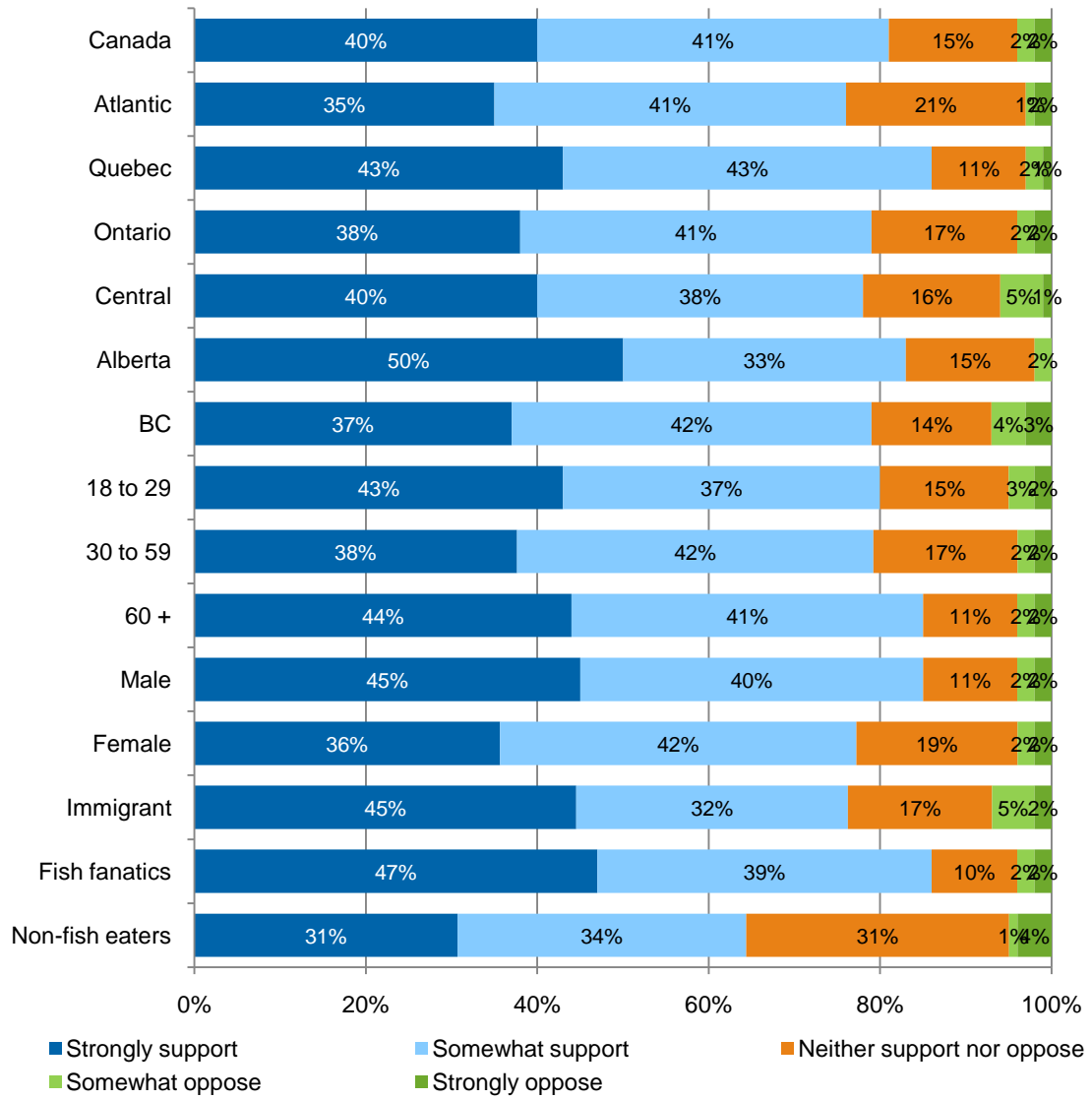
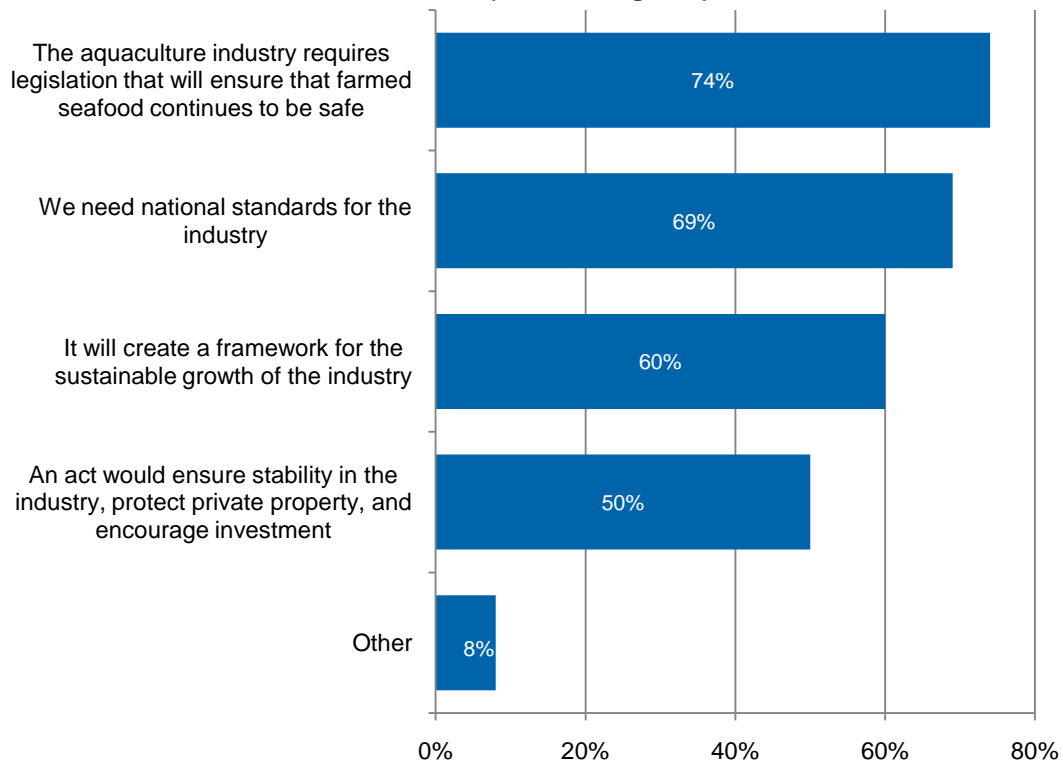


Figure 6.2 Which of these statements, if any, best describes why you SUPPORT a national aquaculture act? Select ALL that apply. [support only] (n=984, weighted)

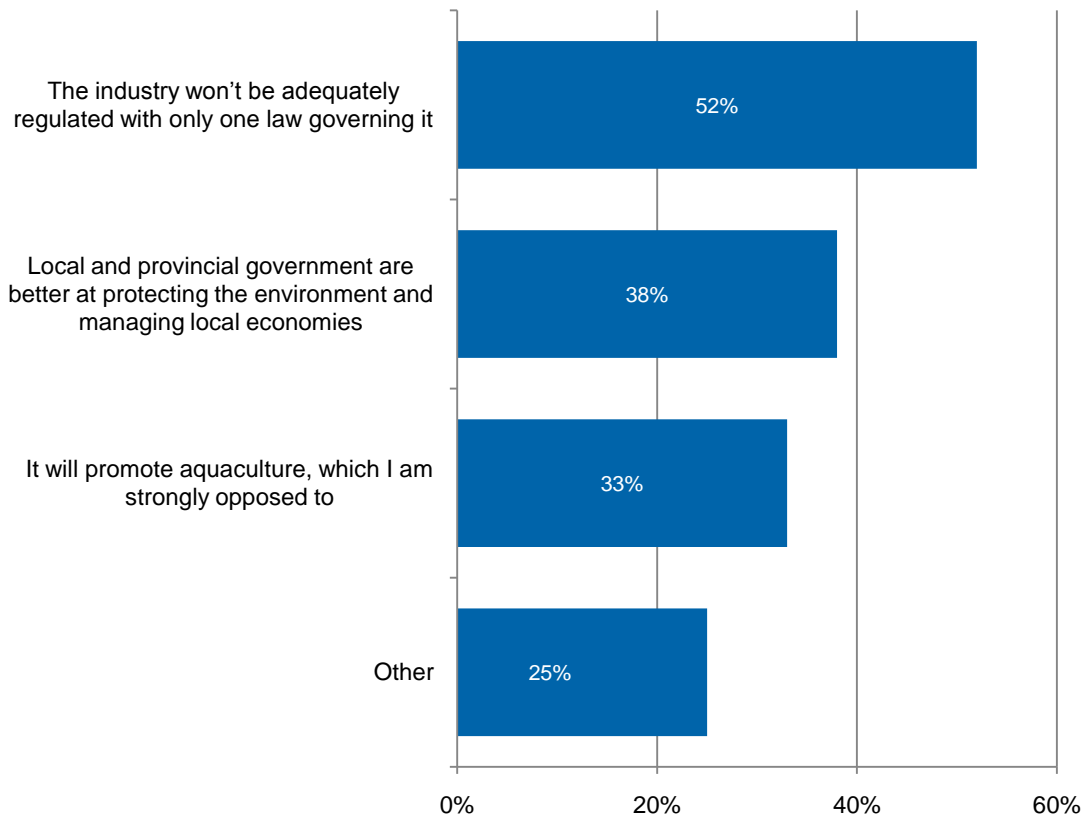


Safety and national standards were the primary reasons why Canadians support a national Aquaculture act. Less than three in four Canadians (74%) selected safety as their reason while 69% of respondents support a national act because Canada needs national standards for the aquaculture industry. One in two respondents (50%) cited the need to ensure stability in the industry, to protect private property, and encourage investment.

Some variation exists across demographic and regional groups:

- Millennials (18-29 years old) were more likely to select legislation to ensure food safety (81%) compared to older Canadians (30 and older, 73%).
- Men (65%) were more likely than women (55%) to choose framework for creating growth as their reason.
- Central Canadians (68%), Albertans (66%), and Atlantic Canadians (66%) were the most likely to select framework for creating growth, while on the other hand, Atlantic Canadians (80%) and British Columbians (78%) were the most likely to say we need national standards.
- Not surprisingly, Quebecers (60%) were the least likely to say national standards was one of the reasons for supporting an act.

Figure 6.3 Which of these statements, if any, best describes why you OPPOSE a national aquaculture act? Select ALL that apply. [opposition only] (n= 48, weighted)



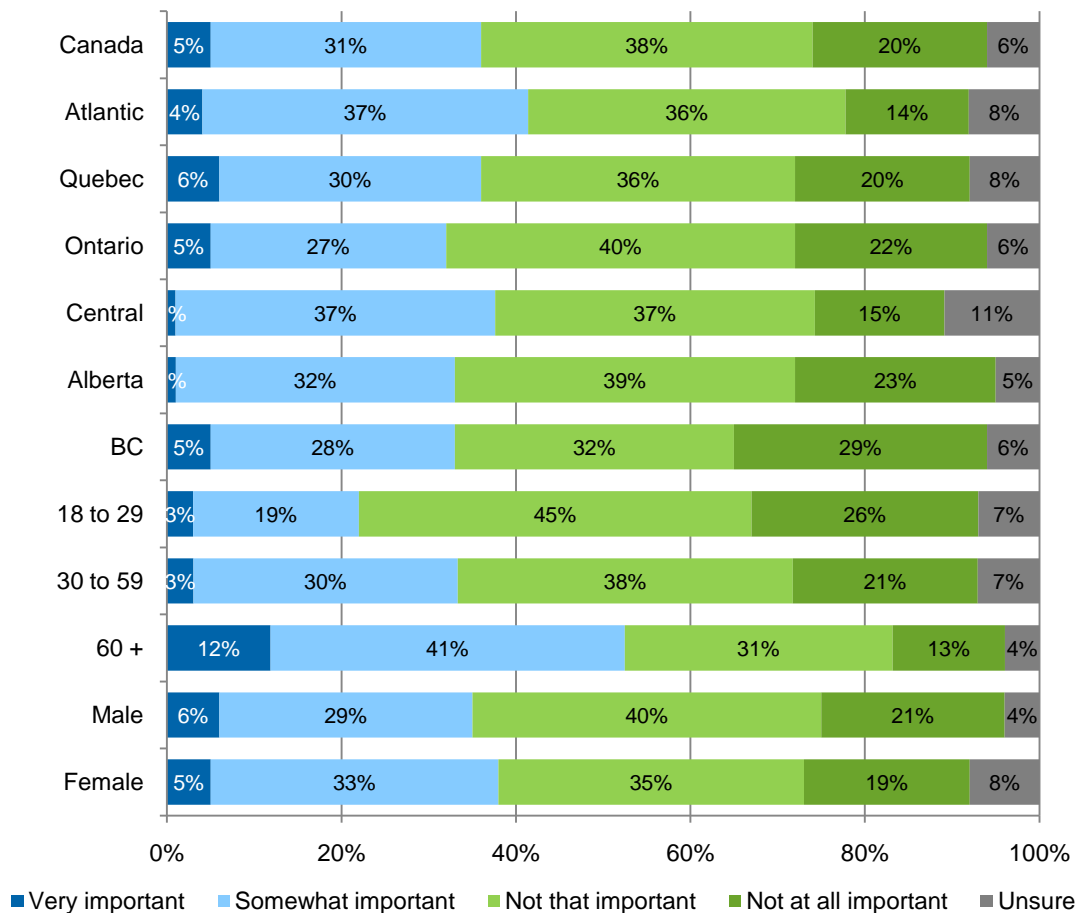
Of those who oppose a national aquaculture act, the primary reason they cite is that they think the industry won't be adequately regulated with only one law (52%). The secondary reason is the belief that local and provincial governments are better at protecting the environment and managing local economies (38%). One-third (33%) said they are opposed to an act because they are strongly opposed to aquaculture.

Readers should keep in mind that only 48 respondents were opposed to a national act, so these results quantify only their views.

7.0 Political Implications

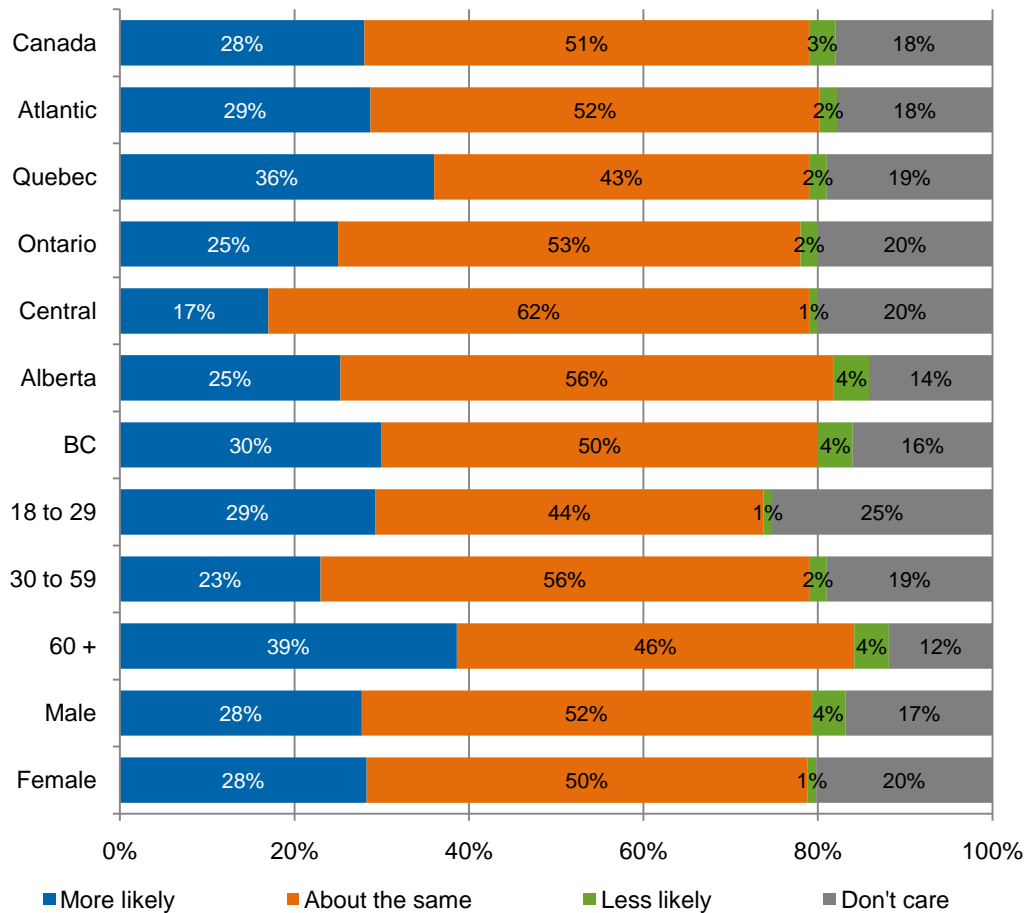
After considering the pros and cons of the aquaculture industry and being asked their thoughts on a national Aquaculture act, respondents were asked how important or unimportant the issue was to their vote in the federal election. Overall, the issue was not a high priority for voters with only 5% saying it was “very important” to their vote. However, another 31% of respondents indicated that the issue was “somewhat important.”

Figure 7.0
Thinking about the current federal election, how important or unimportant is a political party's position on aquaculture to your vote? (n=1,216, weighted)



When respondents were asked specifically about how they would react to a candidate who publicly supports a national aquaculture act, over one in four (28%) said they would be more likely to support that candidate while 51% said it would have no impact on their vote. Only 3% of respondents said that they would be less likely to vote for candidate who publicly supported a national Aquaculture act.

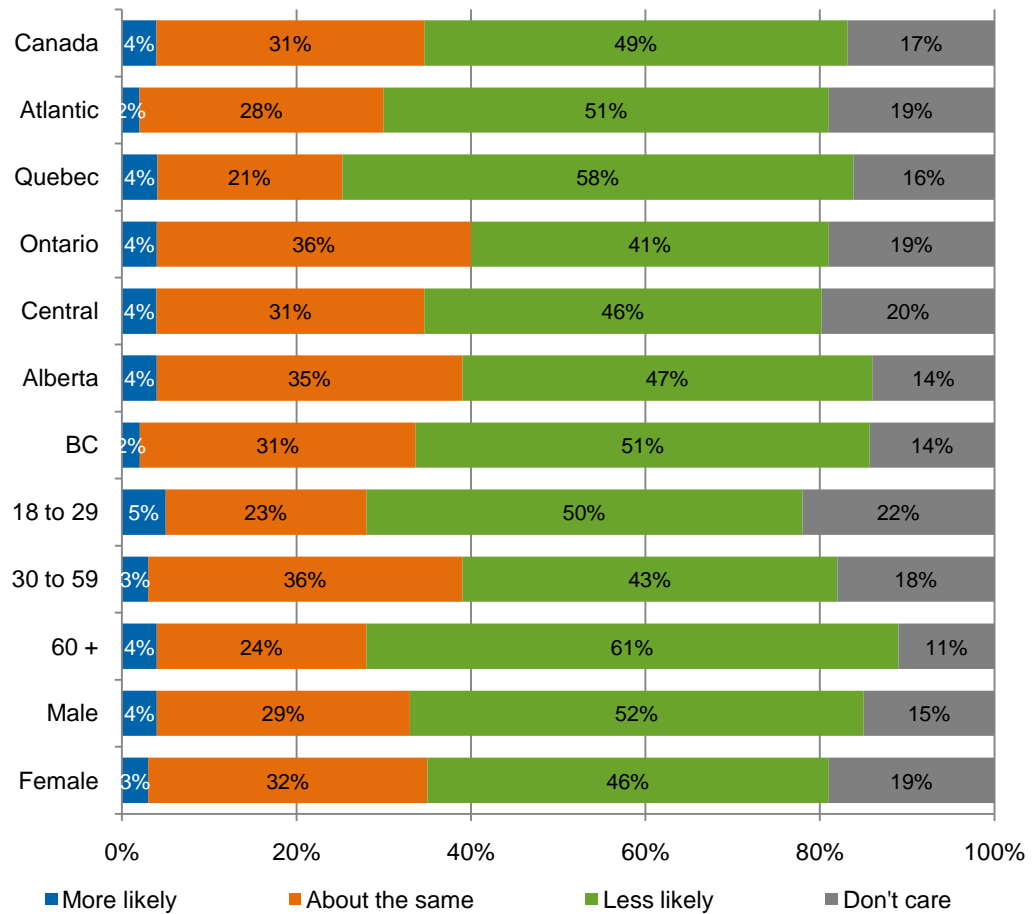
Figure 7.1
Impact on vote for a candidate who:
Publicly supports a national aquaculture act
(n=1,216, weighted)



It is interesting to note that opposition to a national Aquaculture Act generated more reaction than support for an Act. In other words, a candidate who publicly opposes a national aquaculture Act would be more likely to lose support than a candidate who publicly supports an Act would gain.

Less than one in two respondents (49%) said they would be less likely to vote for a candidate who publicly opposed a national Aquaculture Act, while 31% said the position would have no impact on their vote. Only 4% of respondents said they would be more likely to support a candidate who opposed a national Act.

Figure 7.2
Impact on vote for a candidate who:
Publicly opposes a national Aquaculture Act
(n=1,216, weighted)



8.0 Conclusion

Abacus Data's survey of 1,200 Canadians over the age of 18 demonstrated a national consensus does exist on the creation of a national Aquaculture act. Over eight in ten Canadians surveyed (81%) either strongly or somewhat supported the development of a single, national Aquaculture act. This support is driven mainly by the public's support for the industry as well as concerns about the safety of farmed finfish and shellfish.

This said, most Canadians like eating fish, they believe it is healthy; many eat it at home regularly and order it when they are at a restaurant. Although few prefer farmed salmon to wild salmon, just over three of ten Canadians in every region, except Quebec (4 out of 10) and British Columbia (2 out of 10), don't express a preference.

Few believe that aquaculture production should decrease, and almost all believe that being able to find fresh food year round and where they live is important. Understandably support for the creation of one law to govern the aquaculture industry is by most Canadians is high.

With a clear Canadian interest in aquaculture production there is strong support for a single Act establishing industry consistency. While concerns for safety and the development of national standards were ranked highest among residents of Atlantic Canada and British Columbia, the creation of a framework for industry growth and stability was also identified as an important reason to support a national aquaculture act.

Half of Canadians surveyed who support a national act were concerned by the need to ensure stability in the industry and encourage investment. Even more were specifically interested in the need for national standards and ensuring industry growth. However, and not surprisingly, the one concern shared by the most Canadians about why a national aquaculture is important was the need for safety of food products.

9.0 Methodology

The purpose of public opinion research is to measure attitudes and behaviours of a study population within reliable and acceptable statistical margins of accuracy.

Abacus Data Inc. was retained by CAIA to conduct a representative survey of Canadians' public opinion about the aquaculture industry and support for a national aquaculture act.

From April 7th to April 14th, 2011, Abacus Data Inc. conducted an online survey among 1,200 randomly selected Canadian adults from an online panel of over 75,000 Canadians who were randomly selected to join the panel by telephone. Results of the survey were statistically weighted according to 2006 Census data on age, gender, education, region, and past federal vote. Totals may not add up to 100 due to rounding.

For results based on the total sample of national adults, one can say with 95% confidence that the maximum margin of sampling error is ± 2.9 percentage points.

In addition to sampling error, question wording and practical difficulties in conducting surveys can introduce error or bias into the findings of public opinion polls.

The table below details the distribution of weighted and unweighted sample sizes per geographic and demographic group as well as the group's sampling error.

Subgroups	Sample (Weighted)	Sample (Unweighted)	Sampling Error (Unweighted)
Region			
Atlantic Canada	91	175	$\pm 7.5\%$
Quebec	319	238	$\pm 7 \pm 7.5\%.5\%$
Ontario	456	383	
Prairies	77	63	
Alberta	118	102	
British Columbia and North	154	239	
Gender			
Male	583	643	
Female	632	557	
Age Group			
18 to 29	221	174	
30 to 59	686	621	
60 and over	308	405	
Total	1,215	1,200	

10.0 Survey Questionnaire

Are you...

Male

Female

What province do you currently live in?

The next few questions are about your food preferences.

Have you eaten fish or seafood in the past three months?

Yes

No [if no, skip down]

How many times a month do you usually eat finned fish (like salmon, trout or cod)? ____

How many times a month do you usually eat shellfish like crab, shrimp, or mussels? _____

What types of fish/seafood do you eat? Please select all that apply

Salmon

Trout

Other kinds of fish

Shellfish like clams, mussels or oysters

Shrimp, Lobster or crab

Which of the following statements, if any, apply to you? Please select ALL that apply.

I like the taste of most fish

I like the taste of most shellfish

I eat fish because it is healthy

I eat fish because it is cheaper than meat

When I go to a restaurant that serves fish, I often order it.

My family and/or I eat fish at home once in a while

My family and/or I eat fish at home regularly

If you were to buy fresh or frozen salmon, do you prefer to buy...

Wild salmon

Farmed salmon

It doesn't matter to you

Unsure

Why? _____

Below is a list of statements that may or may not be important to you when deciding what type of produce or protein (meat or seafood) to buy. Please tell us whether each is important or not important to you using the scale below. [rotate] [scale-very important to not at all important, unsure]

To find fresh meat, seafood and produce year-round where you live.
To be able to buy locally grown meats, fish, and produce year round.
To purchase food grown and produced in an environmentally sustainable way.

We now want to know what you think about some industries in general.

Below is a list of industries. Thinking about the reputation of the industry, its importance to the Canadian economy, and the impact it has on your own life, please tell us whether you have a favourable or unfavourable impression of each. [scale: very favourable - indifferent-very unfavourable]

Food processing industry
Dairy industry
Beef industry
Fish and shellfish farming industry
Fisheries industry
Oil and gas industry

The next few questions are about aquaculture in Canada.

Aquaculture is the farming of fresh fish, shellfish, or seaweeds, which are cultivated primarily for food instead of being caught in the wild.

Before today, were you aware or unaware that fish and shellfish are farmed for human consumption in Canada?

Yes
No

[if yes] How familiar or unfamiliar would you say you are with the aquaculture industry in Canada?

Very familiar
Somewhat familiar
Somewhat unfamiliar
Very unfamiliar

Now we are now going to show you the two sides of the debate around aquaculture and fish farming in Canada.

Please take a moment and read the information on the next page. We are going to ask you some

questions afterwards.

In Favour of Aquaculture	Opposed to Aquaculture
Farmed seafood accounts for nearly half of the seafood consumed by people around the world.	The potential negative environmental impact of aquaculture outweighs its social and economic benefit to Canada.
Aquaculture provides a locally produced and sustainable source of healthy and affordable protein that is fresh and available year round.	Critics claim that farmed salmon can have higher concentrations of chemicals than wild salmon.
Supporters claim that aquaculture is helping to rebuild Canada's wild fish stocks that have been depleted due to overfishing.	Some critics of fish farming claim that farmed salmon can escape from their pens and mate with wild salmon disrupting wild salmon stocks.
Aquaculture generates \$2.1 billion a year for Canada's economy and employs 14,500 Canadians in many rural and coastal communities.	Thousands of jobs depend on the health of wild fish, like salmon in B.C. or lobsters in Atlantic Canada. If the wild stocks are harmed because of aquaculture, far more jobs will be lost than created.

Based on the information you read on the last page, and what you've heard in the past, do you have a positive or negative impression of the aquaculture industry?

Very positive

Somewhat positive

Neither positive nor negative

Somewhat negative

Very negative

Unsure

Why do you hold that view? _____

Do you think that aquaculture production in Canada should be increased, decreased, or stay the same if it is done in an environmentally sustainable way?

Increased

Stay the same

Decreased

Unsure

Federal Aquaculture act

All things considered, how much confidence do you have in the federal government to regulate the

aquaculture industry and ensure that the fish and seafood produced is safe for consumption and environmentally sustainable?

Very confident

Somewhat confident

Not very confident

Not at all confident

Unsure

Currently, the Canadian aquaculture industry is governed by up to 73 pieces of often conflicting legislation making Canada's aquaculture industry one of the most over-regulated in the world. As well, Canada is the world's only major farmed seafood producing country without national legislation specifically designed to govern and enable its aquaculture industry.

In response, the aquaculture industry has proposed the creation of a national aquaculture act that would bring all these rules into one law.

Based on this and what you read earlier, do you support or oppose the creation of a national aquaculture act?

Strongly support

Somewhat support

Neither support nor oppose

Somewhat oppose

Strongly oppose

[support only] Which of these statements, if any, best describes why you SUPPORT a national aquaculture act? Select ALL that apply.

The aquaculture industry requires legislation that will ensure that farmed seafood continues to be safe.

It will create a framework for the sustainable growth of the industry

We need national standards for the industry.

An act would ensure stability in the industry, protect private property, and encourage investment.

Other _____

[opposition only] Which of these statements, if any, best describes why you OPPOSE a national aquaculture act? Select ALL that apply.

Local and provincial government are better at protecting the environment and managing local economies.

The industry won't be adequately regulated with only one law governing it.

It will promote aquaculture, which I am strongly opposed to.

Other _____

Political questions

Thinking about the current federal election, how important or unimportant is a political party's position on aquaculture to your vote?

Very important

Somewhat important

Not that important

Not at all important

Unsure

Would you be more likely or less likely to vote for a candidate running in your constituency who...
[more likely, same, less likely, don't care]

Publicly supports a national aquaculture act

Publicly opposes a national aquaculture act

Wants to expand and encourage the Canadian aquaculture industry

Wants to limit the growth of the Canadian aquaculture industry