

Majority of Canadians support or somewhat support enacting a national farmed seafood legislation to govern fish farming in Canada

Canadian Aquaculture Survey Summary

submitted by Nanos to Canadian Aquaculture Industry Alliance, November 2017
(Submission 2017-1046)



Summary

A significant majority of Canadians support or somewhat support enacting a national farmed seafood legislation to govern fish farming in Canada. The majority of Canadians support or somewhat support the practice of fish farming in Canada, and agree or somewhat agree that fish farming is a sustainable food source and that it contributes to regional development in Canada.

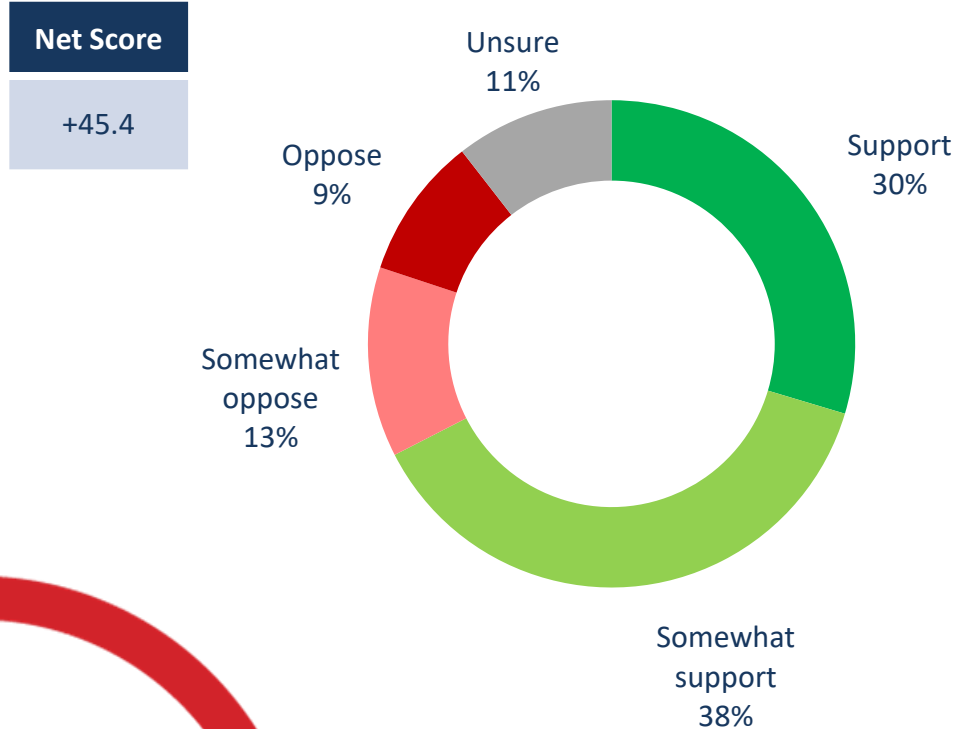
- **Close to seven in ten Canadians support or somewhat support the practice of fish farming in Canada** – Nearly seven out of ten Canadians support (30%) or somewhat support (38%) the practice of fish farming in Canada, while just over two in ten somewhat oppose (13%) or oppose (nine per cent) it. Eleven per cent are unsure.
- **More than two in five Canadians say that the practice of fish farming should be increased** – When asked about the practice of fish farming, given that wild fish stocks can be overfished, 44 per cent of Canadians think that the practice of fish farming should be increased, while 25 per cent think it should stay at the same level and 13 per cent think it should be decreased. Seventeen per cent are unsure.
- **Close to eight in ten Canadians agree or somewhat agree that Canadian fish farming is a sustainable food source** – Nearly eight in ten Canadians agree (40%) or somewhat agree (38%) that Canadian fish farming is a sustainable food source, while more than one in ten somewhat disagree (seven per cent) or disagree (eight per cent). Eight per cent are unsure.
- **Over three in four Canadians agree or somewhat agree that fish farming contributes to regional development in Canada** – More than three in four Canadians agree (38%) or somewhat agree (38%) that fish farming contributes to regional development in Canada, while over one in ten somewhat disagree (five per cent) or disagree (seven per cent). Eleven per cent are unsure.
- **Close to nine in ten Canadians support or somewhat support enacting a national farmed seafood legislation to govern fish farming in Canada** – When asked their level of support for enacting national farmed seafood legislation to govern fish farming in Canada, close to nine in ten Canadians say they support (58%) or somewhat support (28%) it, while less than one in ten somewhat oppose (four per cent) or oppose (three per cent) this. Seven per cent are unsure.

These observations are based on an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 29th and October 3rd, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Canadian Aquaculture Industry Alliance.

Support towards fish farming

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



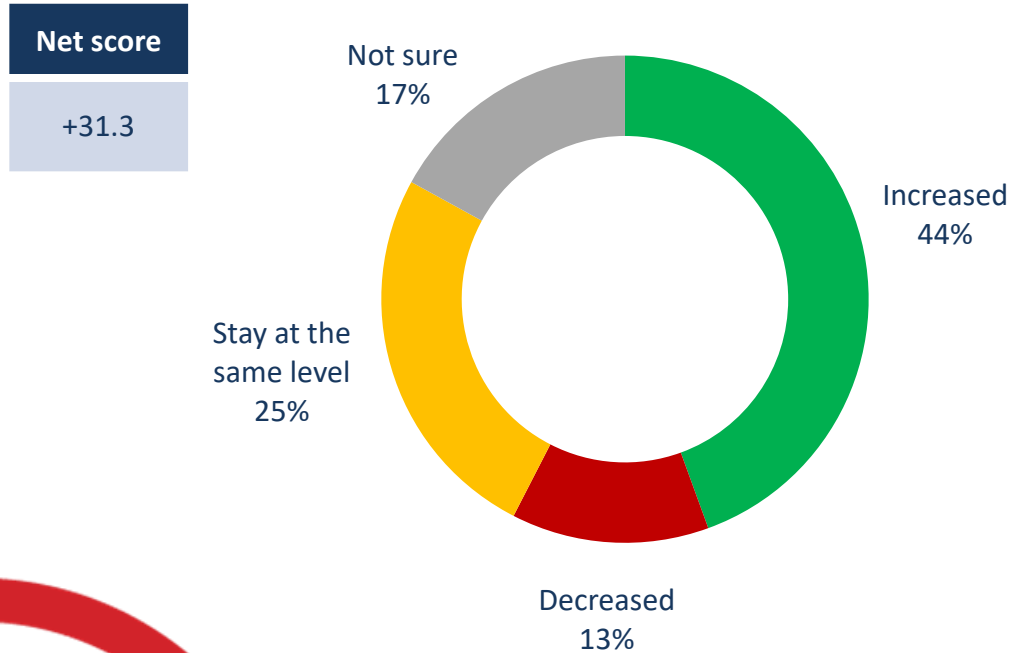
Subgroups	Support/ Somewhat support
Atlantic (n=100)	78.1%
Quebec (n=250)	73.6%
Ontario (n=300)	67.9%
Prairies (n=200)	63.2%
British Columbia (n=150)	54.9%
Male (n=468)	74.2%
Female (n=532)	61.0%
18 to 34 (n=239)	71.1%
35 to 54 (n=364)	66.6%
55 plus (n=397)	65.6%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose, or oppose the practice of fish farming in Canada?

Practice of fish farming

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.



Subgroups	Increase
Atlantic (n=100)	46.1%
Quebec (n=250)	48.9%
Ontario (n=300)	44.1%
Prairies (n=200)	43.9%
British Columbia (n=150)	37.3%
Male (n=468)	52.0%
Female (n=532)	37.2%
18 to 34 (n=239)	52.6%
35 to 54 (n=364)	43.3%
55 plus (n=397)	39.8%

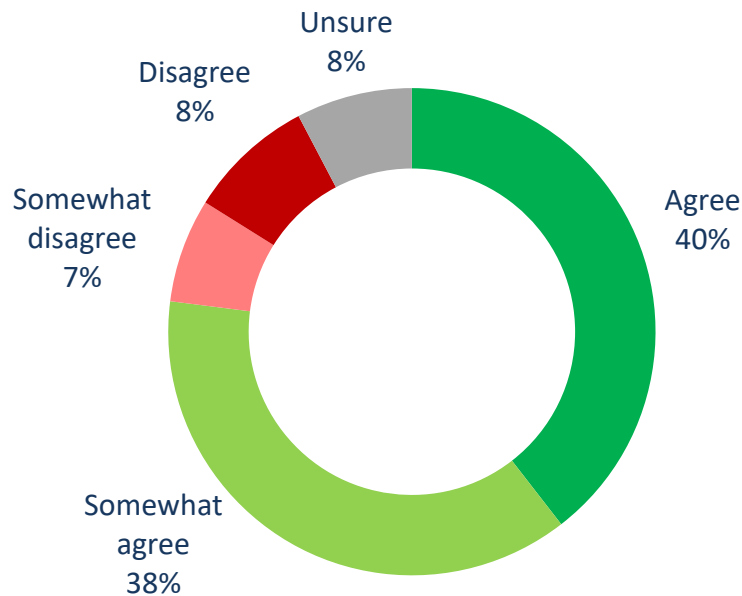
*Note: Charts may not add up to 100 due to rounding

QUESTION – Given that wild fish stocks are often over-fished, do you think the practice of fish farming should be increased, decreased or stay the same in the future?

Agreement with Canadian fish farming as sustainable food source

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+61.7



Subgroups	Support/ Somewhat support
Atlantic (n=100)	86.2%
Quebec (n=250)	80.0%
Ontario (n=300)	77.1%
Prairies (n=200)	72.3%
British Columbia (n=150)	72.0%
Male (n=468)	80.4%
Female (n=532)	73.7%
18 to 34 (n=239)	76.2%
35 to 54 (n=364)	79.0%
55 plus (n=397)	75.8%

***Note: Charts may not add up to 100 due to rounding**

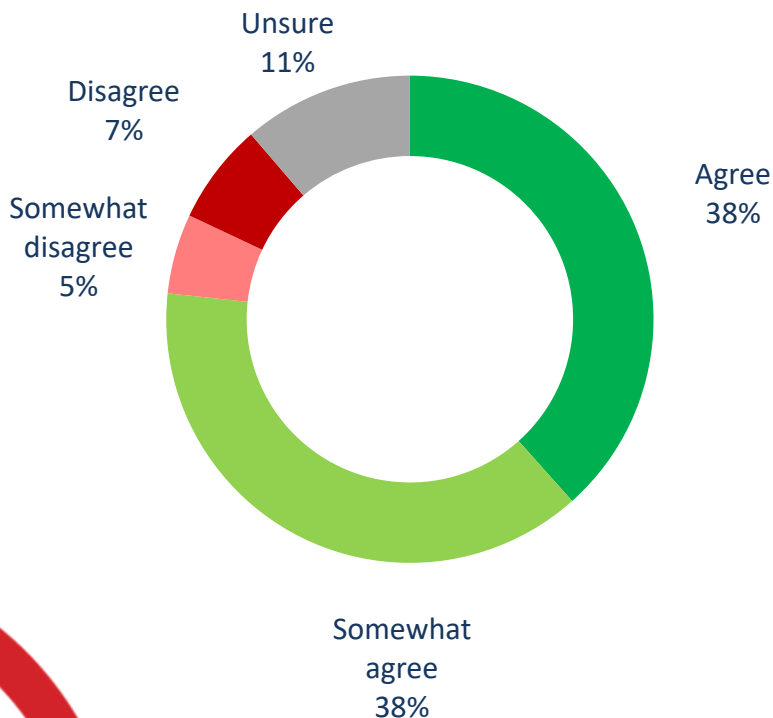
QUESTION – Do you agree, somewhat agree, somewhat disagree, or disagree with the following statements?

Canadian fish farming is a sustainable food source.

Contribution of fish farming to Canadian regional development

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+64.7



Subgroups	Support/ Somewhat support
Atlantic (n=100)	85.9%
Quebec (n=250)	77.4%
Ontario (n=300)	76.1%
Prairies (n=200)	77.9%
British Columbia (n=150)	68.9%
Male (n=468)	81.4%
Female (n=532)	72.2%
18 to 34 (n=239)	78.7%
35 to 54 (n=364)	77.0%
55 plus (n=397)	75.1%

***Note: Charts may not add up to 100 due to rounding**

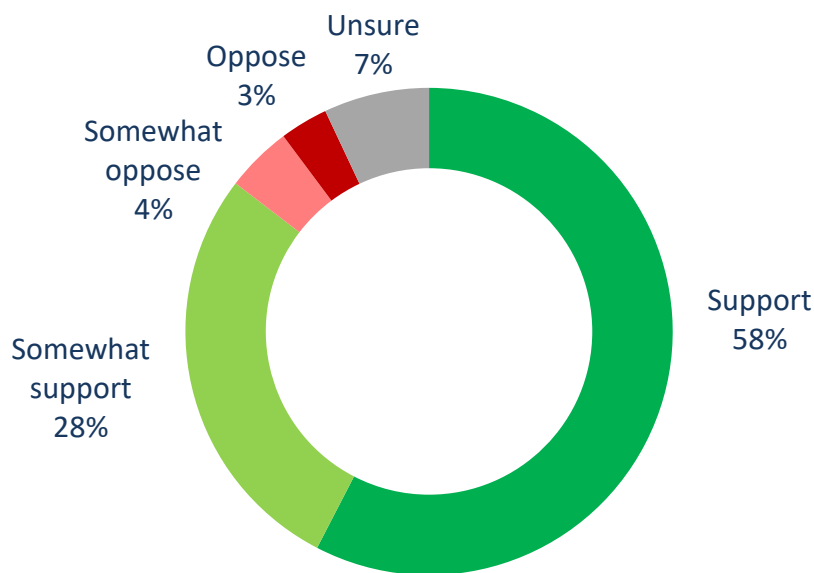
QUESTION – Do you agree, somewhat agree, somewhat disagree, or disagree with the following statements?

Fish farming contributes to regional development in Canada

Support for national farmed seafood legislation

Source: Nanos Research, RDD dual frame hybrid telephone and online random survey, September 29th and October 3rd, 2017, n=1000, accurate 3.1 percentage points plus or minus, 19 times out of 20.

Net Score
+77.8



Subgroups	Support/ Somewhat support
Atlantic (n=100)	90.4%
Quebec (n=250)	86.1%
Ontario (n=300)	87.0%
Prairies (n=200)	79.5%
British Columbia (n=150)	85.6%
Male (n=468)	85.0%
Female (n=532)	85.9%
18 to 34 (n=239)	85.6%
35 to 54 (n=364)	85.0%
55 plus (n=397)	85.8%

***Note: Charts may not add up to 100 due to rounding**

QUESTION – Do you support, somewhat support, somewhat oppose, or oppose enacting national farmed seafood legislation to govern fish farming in Canada? This new legislation would enable better federal provincial cooperation, set standards for farmed fish in Canada.



Methodology

Methodology

Nanos conducted an RDD dual frame (land- and cell-lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 29th and October 3rd, 2017 as part of an omnibus survey. Participants were randomly recruited by telephone using live agents and administered a survey online. The results were statistically checked and weighted by age and gender using the latest Census information and the sample is geographically stratified to be representative of Canada.

Individuals were randomly called using random digit dialling with a maximum of five call backs.

The margin of error for a random survey of 1,000 Canadians is ± 3.1 percentage points, 19 times out of 20.

The research was commissioned by Canadian Aquaculture Industry Alliance.

Note: Charts may not add up to 100 due to rounding.



About Nanos

Nanos is one of North America's most trusted research and strategy organizations. Our team of professionals is regularly called upon by senior executives to deliver superior intelligence and market advantage whether it be helping to chart a path forward, managing a reputation or brand risk or understanding the trends that drive success. Services range from traditional telephone surveys, through to elite in-depth interviews, online research and focus groups. Nanos clients range from Fortune 500 companies through to leading advocacy groups interested in understanding and shaping the public landscape. Whether it is understanding your brand or reputation, customer needs and satisfaction, engaging employees or testing new ads or products, Nanos provides insight you can trust.



View our brochure

Nanos Research

North America Toll-free

1.888.737.5505

info@nanosresearch.com

Technical Note

Element	Description	Element	Description
Organization who commissioned the research	Canadian Aquaculture Industry Alliance	Weighting of Data	The results were weighted by age and gender using the latest Census information (2014) and the sample is geographically stratified to ensure a distribution across all regions of Canada. See tables for full weighting disclosure
Final Sample Size	1000 Randomly selected individuals.	Screening	Screening ensured potential respondents did not work in the market research industry, in the advertising industry, in the media or a political party prior to administering the survey to ensure the integrity of the data.
Margin of Error	±3.1 percentage points, 19 times out of 20.	Excluded Demographics	Individuals younger than 18 years old; individuals without land or cell lines could not participate.
Mode of Survey	RDD dual frame (land- and cell-lines) hybrid telephone and online omnibus survey	Stratification	By age and gender using the latest Census information (2014) and the sample is geographically stratified to be representative of Canada. Smaller areas such as Atlantic Canada were marginally oversampled to allow for a minimum regional sample.
Sampling Method Base	The sample included both land- and cell-lines RDD (Random Digit Dialed) across Canada.	Estimated Response Rate	13 percent, consistent with industry norms.
Demographics (Captured)	Atlantic Canada, Quebec, Ontario, Prairies, British Columbia; Men and Women; 18 years and older. Six digit postal code was used to validate geography.	Question Order	Question order in the preceding report reflects the order in which they appeared in the original questionnaire.
Fieldwork/Validation	Live interviews with live supervision to validate work as per the MRIA Code of Conduct	Question Content	This was module two of an omnibus survey. The preceding module asked about unprompted top issues of national concern.
Number of Calls	Maximum of five call backs.	Question Wording	The questions in the preceding report are written exactly as they were asked to individuals.
Time of Calls	Individuals were called between 12-5:30 pm and 6:30-9:30pm local time for the respondent.	Survey Company	Nanos Research
Field Dates	September 29 th to October 3 rd , 2017.	Contact	Contact Nanos Research for more information or with any concerns or questions. http://www.nanosresearch.com Telephone:(613) 234-4666 ext. Email: info@nanosresearch.com.
Language of Survey	The survey was conducted in both English and French.		



Tabulations



2017-1046 – Canadian Aquaculture – National Omni STAT SHEET

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Do you support, somewhat support, somewhat oppose, or oppose the practice of fish farming in Canada?	Total	Unwgt N	1000	100	250	300	200	150	468	532	239	364	397
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Support	%	29.6	41.4	33.9	28.3	30.0	16.8	36.0	23.5	35.4	26.5	28.3
	Somewhat support	%	37.8	36.7	39.7	39.6	33.2	38.1	38.2	37.5	35.7	40.1	37.3
	Somewhat oppose	%	12.6	9.3	7.3	11.3	15.0	23.2	9.8	15.4	12.2	12.5	13.1
	Oppose	%	9.4	9.5	4.0	9.5	7.9	20.1	7.8	11.0	5.5	9.7	11.9
	Unsure	%	10.5	3.0	15.0	11.2	13.9	1.9	8.2	12.7	11.2	11.2	9.4

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Given that wild fish stocks can be over-fished, do you think the practice of fish farming should be increased, decreased or stay the same in the future?	Total	Unwgt N	1000	100	250	300	200	150	468	532	239	364	397
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Increased	%	44.4	46.1	48.9	44.1	43.9	37.3	52.0	37.2	52.6	43.3	39.8
	Decreased	%	13.1	10.3	8.5	11.8	11.5	27.6	9.5	16.7	10.4	12.5	15.6
	Stay at the same level	%	25.4	28.1	25.0	23.8	27.5	24.5	23.3	27.4	20.3	25.5	28.8
	Not sure	%	17.0	15.6	17.6	20.3	17.0	10.6	15.3	18.8	16.7	18.7	15.9

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 29th and October 3rd, 2017. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.



2017-1046 – Canadian Aquaculture – National Omni STAT SHEET

Do you agree, somewhat agree, somewhat disagree, or disagree with the following statements? [ROTATE]

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Canadian fish farming is a sustainable food source.	Total	Unwgt N	1000	100	250	300	200	150	468	532	239	364	397
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	39.5	47.7	39.0	41.7	40.8	28.6	44.4	34.7	36.7	42.7	38.6
	Somewhat agree	%	37.5	38.5	41.0	35.4	31.5	43.4	36.0	39.0	39.5	36.3	37.2
	Somewhat disagree	%	6.9	4.2	6.0	5.9	9.5	9.0	6.4	7.5	6.2	6.5	7.8
	Disagree	%	8.4	6.7	5.2	8.2	8.5	15.2	6.3	10.5	7.1	7.5	10.1
	Unsure	%	7.7	2.9	8.8	8.8	9.7	3.8	7.0	8.3	10.6	6.9	6.3

Do you agree, somewhat agree, somewhat disagree, or disagree with the following statements? [ROTATE]

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Fish farming contributes to regional development in Canada.	Total	Unwgt N	1000	100	250	300	200	150	468	532	239	364	397
		Wgt N	1000	100	250	300	200	150	491	509	271	340	389
	Agree	%	38.4	46.7	36.0	40.5	43.2	26.1	43.6	33.4	40.6	37.9	37.3
	Somewhat agree	%	38.3	39.2	41.4	35.6	34.7	42.8	37.8	38.8	38.1	39.1	37.8
	Somewhat disagree	%	5.3	2.3	4.9	5.5	6.5	6.3	4.2	6.4	4.7	4.8	6.2
	Disagree	%	6.7	6.9	3.6	6.1	4.8	15.0	5.6	7.7	5.4	5.6	8.5
	Unsure	%	11.3	4.8	14.1	12.3	10.9	9.7	8.8	13.7	11.1	12.7	10.3

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 29th and October 3rd, 2017. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

www.nanosresearch.com



2017-1046 – Canadian Aquaculture – National Omni STAT SHEET

			Region					Gender		Age			
			Canada 2017-09	Atlantic Canada	Quebec	Ontario	Prairies	British Columbia	Male	Female	18 to 34	35 to 54	55 plus
Question - Do you support, somewhat support, somewhat oppose, or oppose enacting national farmed seafood legislation to govern fish farming in Canada? This new legislation would enable better federal provincial cooperation, set standards for farmed fish in Canada.	Total	Unwgt N	998	100	250	298	200	150	467	531	239	362	397
		Wgt N	998	100	250	298	200	150	489	508	271	338	389
	Support	%	57.6	67.5	50.5	64.4	51.4	57.5	57.7	57.5	58.9	52.2	61.4
	Somewhat support	%	27.8	22.9	35.6	22.6	28.1	28.1	27.3	28.4	26.7	32.8	24.4
	Somewhat oppose	%	4.4	3.9	3.5	4.1	6.1	4.5	5.6	3.2	5.0	4.7	3.7
	Oppose	%	3.2	.8	2.7	1.3	6.2	5.4	3.3	3.1	1.8	3.0	4.3
	Unsure	%	7.0	4.9	7.7	7.6	8.2	4.5	6.2	7.8	7.6	7.3	6.3

Nanos conducted an RDD dual frame (land- and cell- lines) hybrid telephone and online random survey of 1,000 Canadians, 18 years of age or older, between September 29th and October 3rd, 2017. The margin of error for a random survey of 1,000 Canadians is ±3.1 percentage points, 19 times out of 20.

www.nanosresearch.com