



Opinions of Newfoundland Sealers on the State of the Sealing and Fishing Industries



An impact assessment study conducted on behalf of:



**HUMANE SOCIETY
INTERNATIONAL**



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Introduction



In 2005, a boycott was initiated within the USA that targeted Canadian seafood products. The objective of the boycott, launched by the Humane Society of the United States, is to pressure the Canadian fishing industry and government to end the commercial seal hunt.

In Fall 2009, Humane Society International set out to assess perceptions about the state of the sealing industry and the impact of the seafood boycott, by consulting with stakeholder groups in Newfoundland.

To this end, Ipsos was mandated to execute a telephone survey targeting individual fishers and sealers as well as vessel owners and exporters / processors of seafood products.

The present report details the findings and conclusions of the study, conducted over the period December 2009 – January 2010, amongst owners of fishing vessels licensed to participate in the commercial seal hunt and individual fishers who confirmed that they were holders of sealing licenses.

Key Learnings

The fishing industry is generally felt to be in a state of decline.

The majority of respondents with an opinion on the matter characterized the Newfoundland fishing industry as being in a state of decline – with half saying the decline is “significant”.

Strong results observed in terms of prompted awareness of the boycott, perceived personal impact stemming from it, and concern for its continuance.

The large majority (4-in-5 overall) of respondents with an opinion describe themselves as being aware of the US seafood boycott, and over half (56%) of these feel that they have been negatively impacted by it.

Moreover, 2-in-3 of those with an opinion expressed concerned about the impact of the boycott to-date (1-in-2 strongly so), and roughly 6-in-10 of those with an opinion believe it will negatively impact the Newfoundland fishing industry going forward.

Finally, two-thirds of those with an opinion anticipate that the dollar value of the landed seal hunt will not improve from the 2009 level (under \$1 million in Newfoundland), with 1-in-3 of those with an opinion anticipating the dollar value of the landed seal hunt will decline significantly from present levels in coming years.

Half of licensed sealers are open to a federal buyout of the sealing industry.

Half of those with an opinion on the matter were open to a proposed federal buyout of the commercial sealing industry, which would “involve fishermen and vessel owners being compensated for their sealing licenses, and money being invested in economic alternatives for affected communities.”



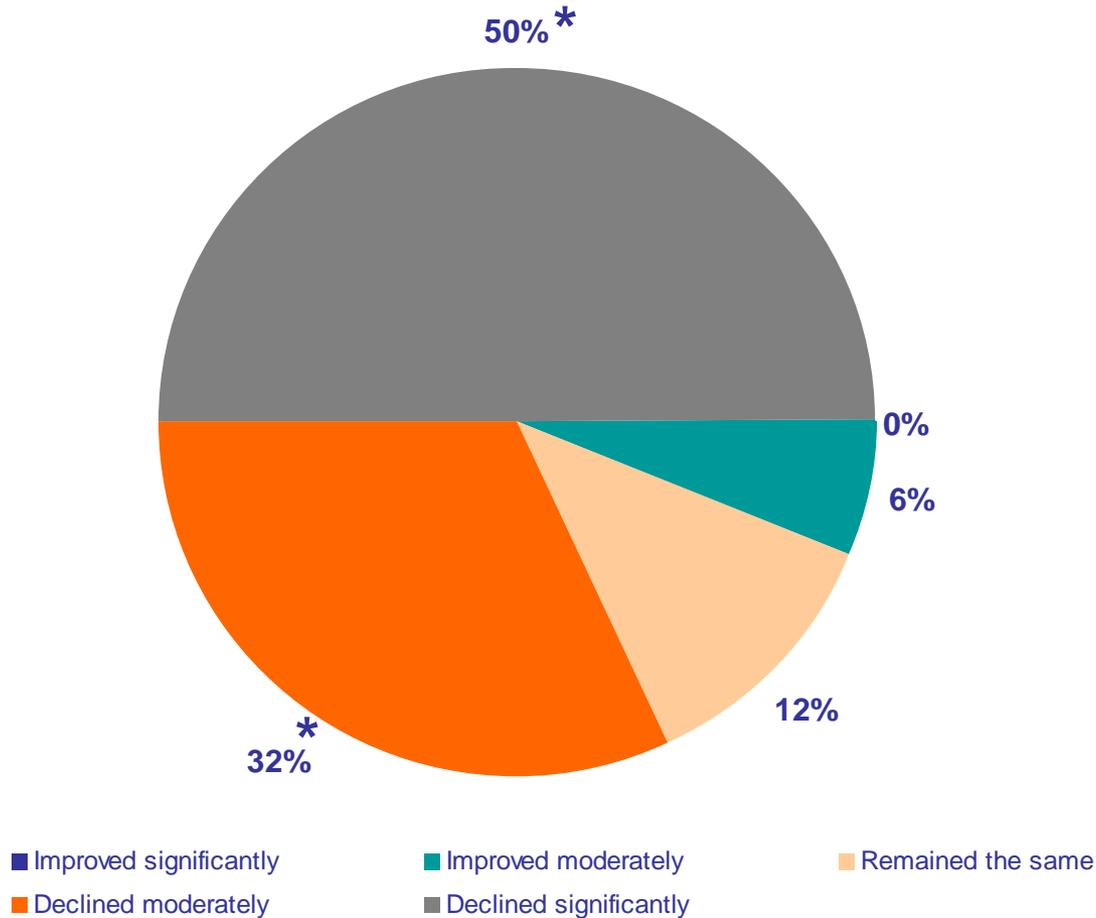
Detailed Findings

Current State of the NL Fishing/Export Industry

Q: Compared to 5 years ago, do you feel the Newfoundland fishing and seafood export industry has...

Base: Sealing License Holders with an opinion (n=179)

Amongst those with an opinion, the large majority of individuals holding a sealing license depicted the fishing and seafood export industry as being in either moderate or significant decline (4-in-5 overall).



* After rounding, responses indicating a decline total 83%.

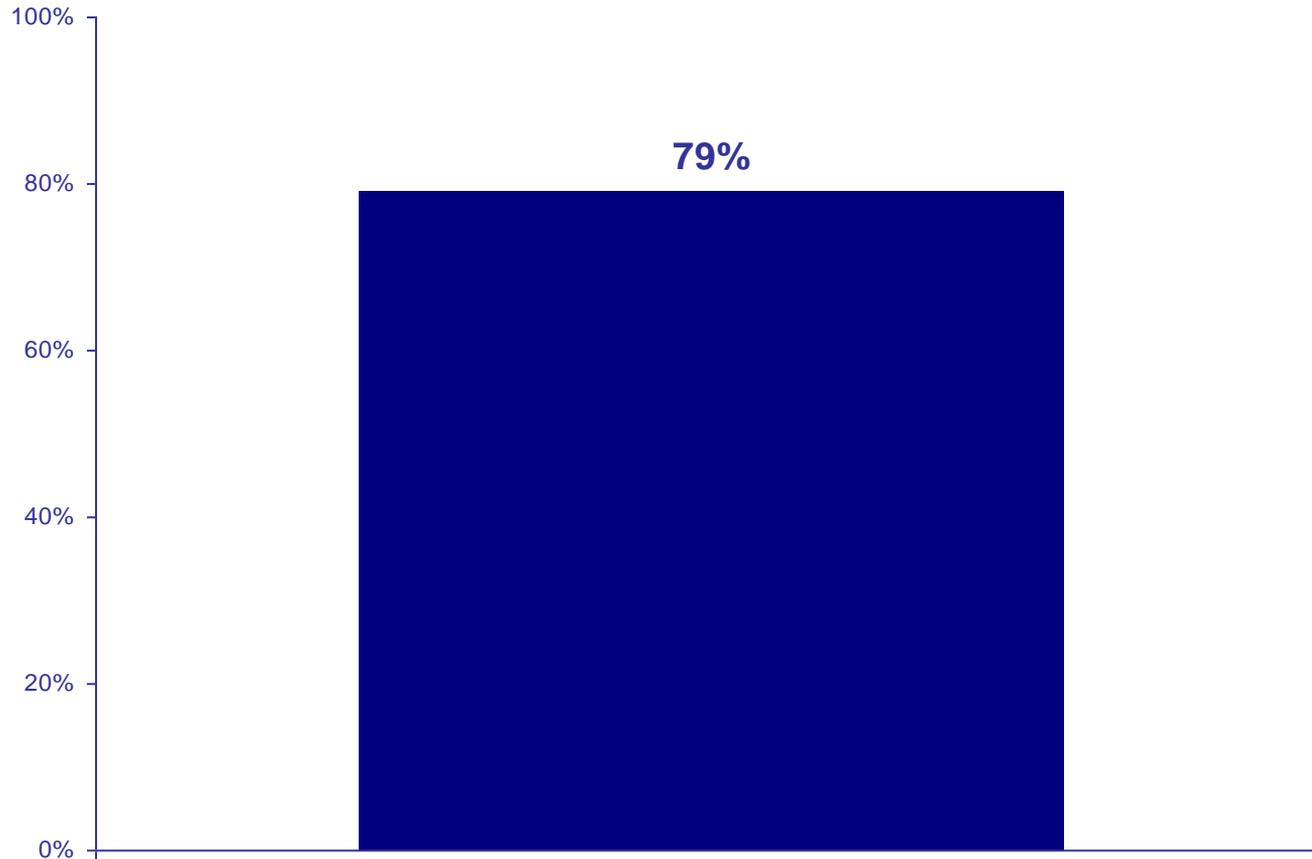


Awareness of Boycott

Q: There is currently a boycott of Canadian seafood products in the United States, the goal of which is to pressure the Canadian fishing industry and government to end the commercial seal hunt. Prior to this moment, were you aware of this seafood boycott?

Base: Sealing License Holders with an opinion (n=180)

Most holders of sealing licenses with an opinion (just under 4-in-5) claim to be aware of the US boycott of Canadian seafood products.



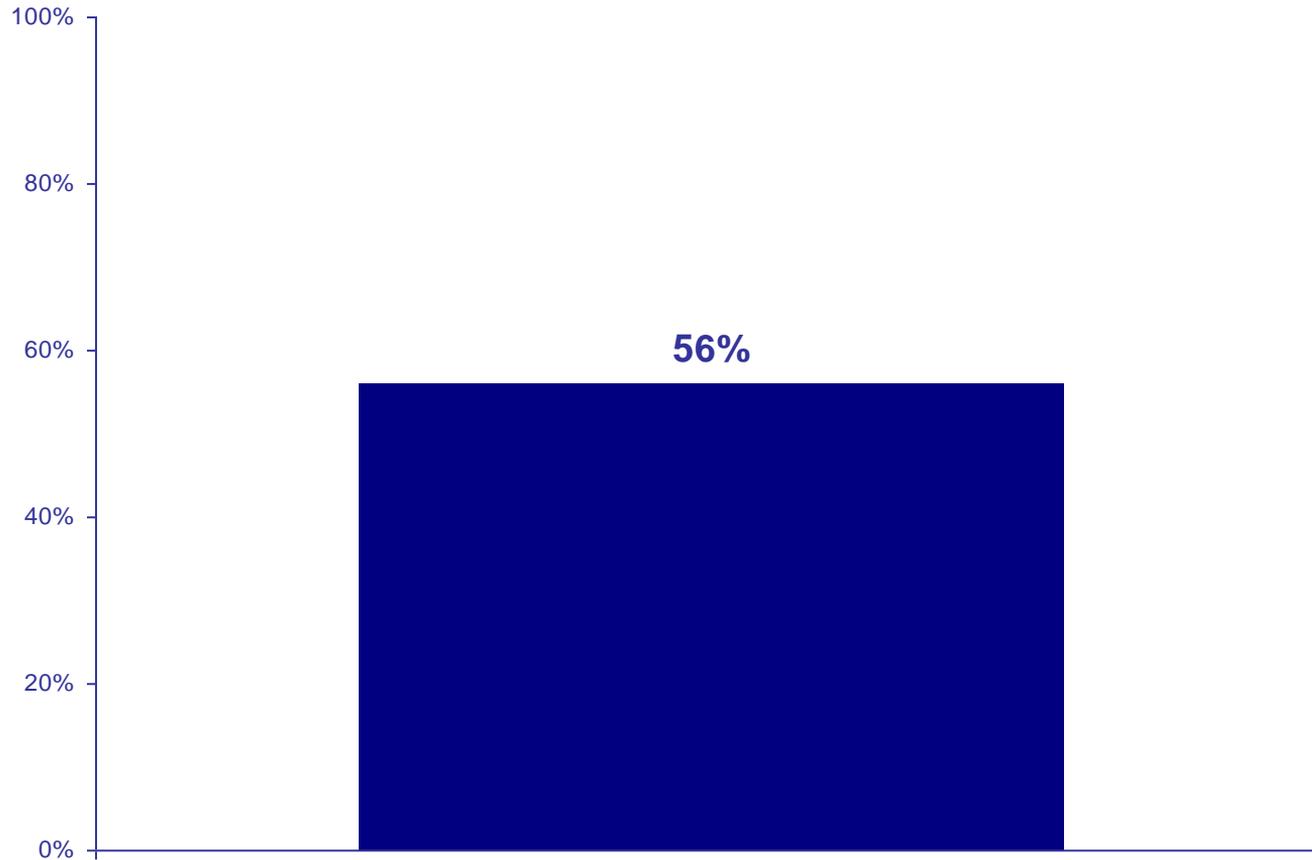


Personally Impacted By The US Boycott

Q: Have you personally felt any impact of the boycott?

Base: Sealing License Holders aware of the boycott and with an opinion (n=135)

Roughly half of those sealing license holders with an opinion who are aware of the boycott claim to have personally felt a repercussion.

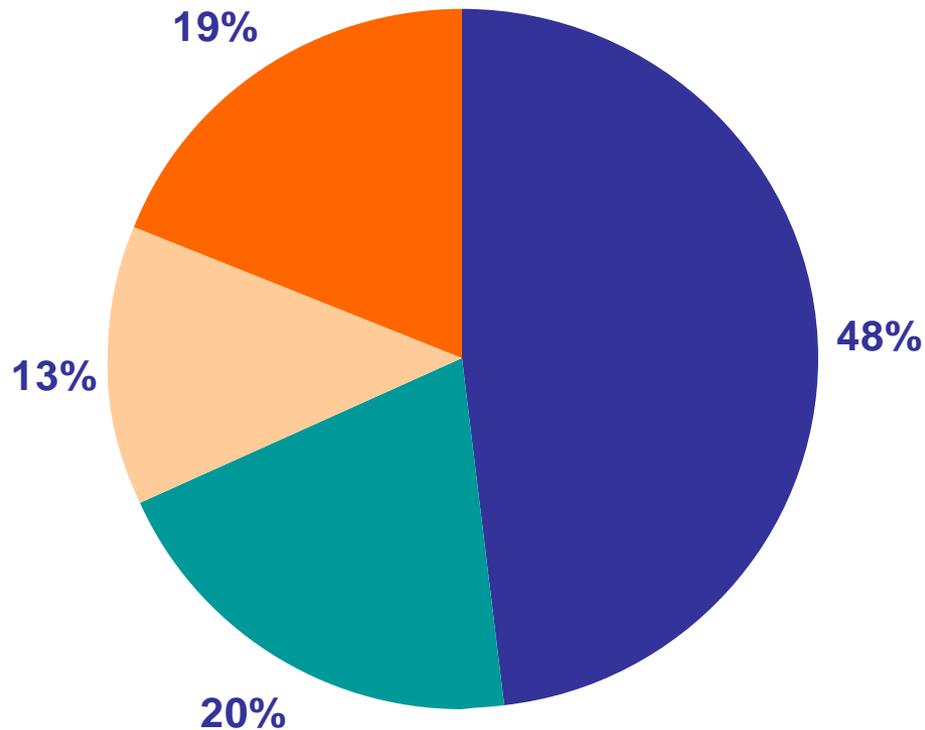


Level of Concern about Boycott

Q: To what extent are you concerned about the impact of the boycott?

Base: Sealing License Holders with an opinion (n=178)

Amongst those with an opinion, the majority (2-in-3 overall) of sealing license holders expressed either a moderate or high degree of concern about the impact of the boycott. Just under 1-in-5 are “not at all” concerned about the boycott.



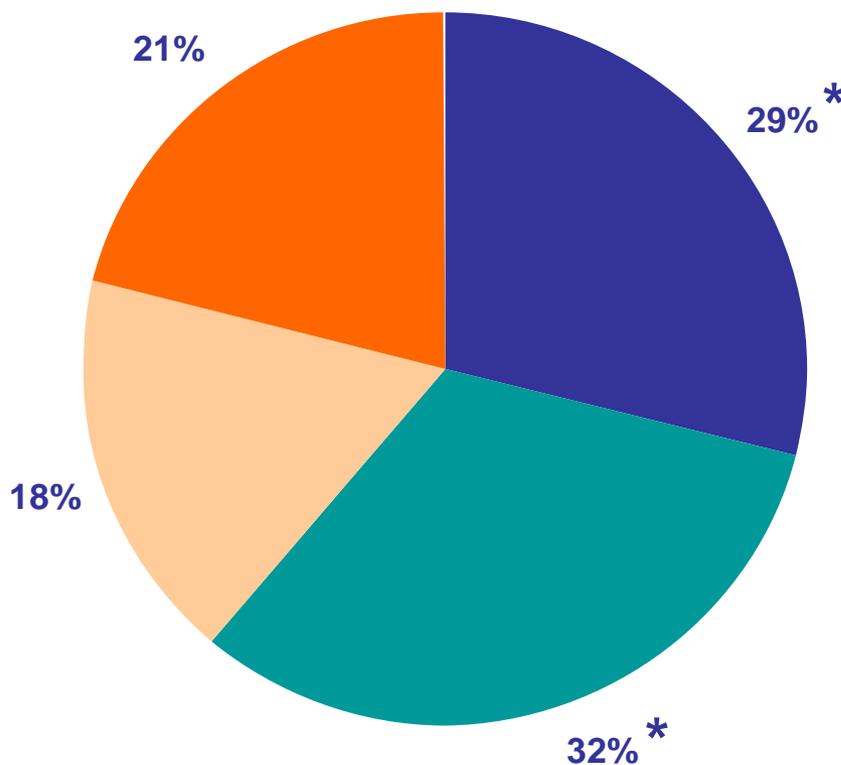
■ Highly concerned ■ Somewhat concerned ■ Concerned only a little ■ Not at all concerned

Future Impact of Boycott on Industry

Q: What impact do you think the boycott will have on the fishing and seafood industry in the future?

Base: Sealing License Holders with an opinion (n=177)

Amongst those with an opinion, the majority of sealing license holders felt that the boycott would have either a moderate or significant damaging impact upon the fishing and seafood industry (just over 6-in-10 overall). Roughly 1-in-5 felt the boycott would not negatively impact the industry whatsoever.



■ Significantly hurt the industry ■ Somewhat hurt the industry ■ Hurt the industry only a little ■ Not hurt the industry at all

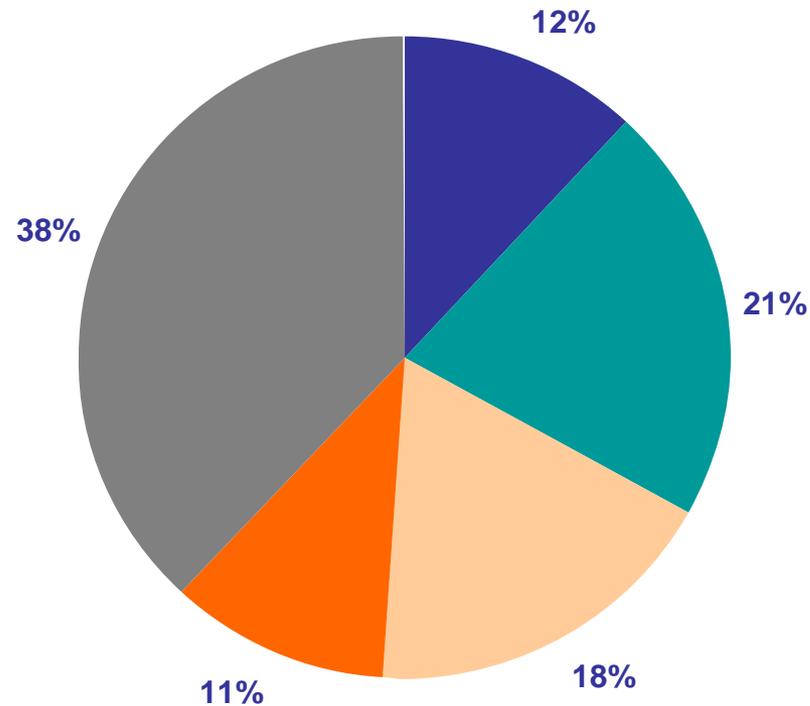
* After rounding, "significantly hurt" and "somewhat hurt" responses total 62%.

Future Value Of Sealing Industry

Q: Do you think the landed value of the seal hunt is likely to..

Base: Sealing License Holders with an opinion (n=172)

Amongst those with an opinion, 2-in-3 sealing license holders overall felt that the landed value of the sealing industry would remain at current levels or experience further decline in coming years (38% felt the industry would decline “significantly”).



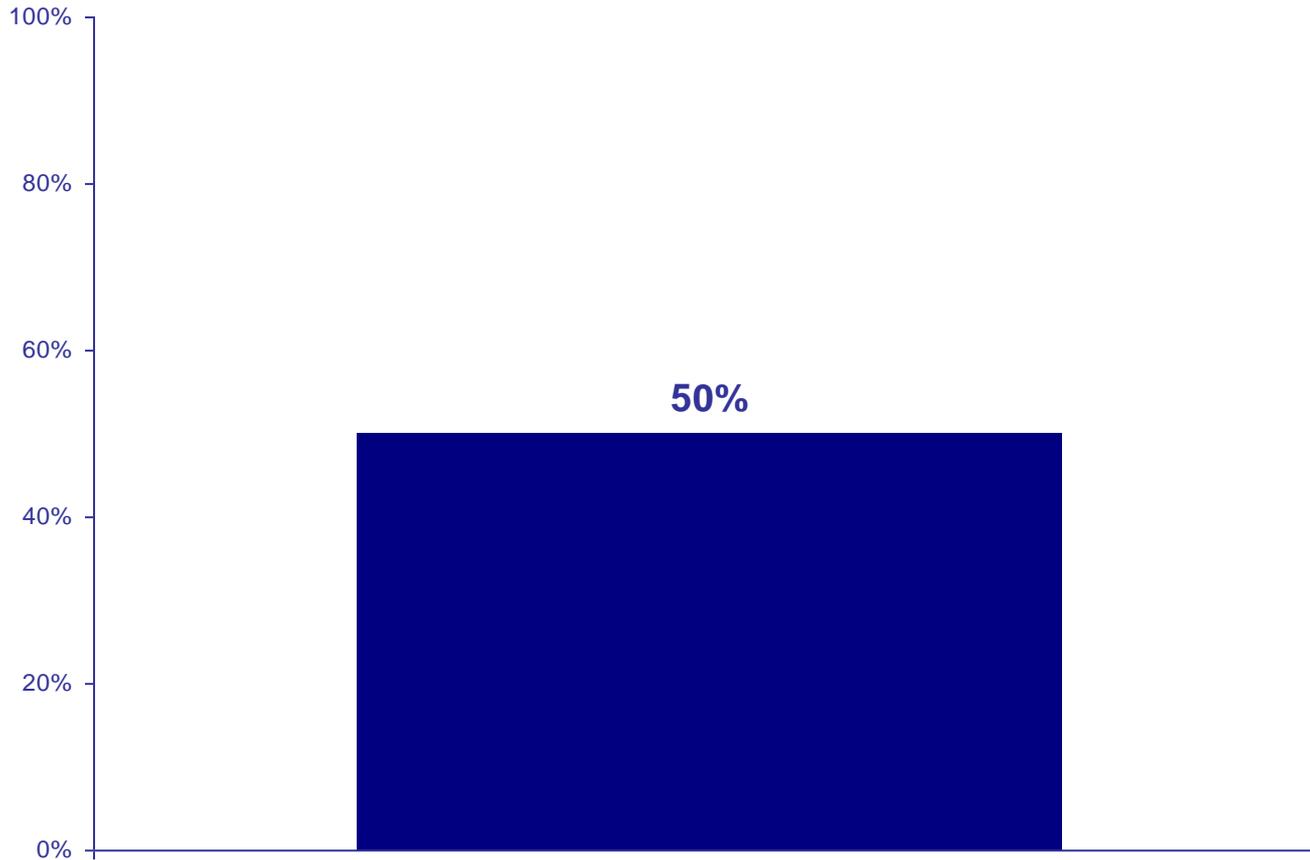
■ Improve significantly ■ Improve somewhat ■ Remain the same ■ Decline only a little ■ Decline significantly



Support For A License Buyout Plan

Q: Would you support a sealing license buyout plan?
Base: Sealing License Holders with an opinion (n=173)

Among sealing license holders expressing an opinion, half support a federal sealing industry buyout plan.



- This study was conducted by means of outbound telephone (CATI) interviews amongst households and businesspeople in Newfoundland between December 7th 2009 and January 24th, 2010 (with a 3 week break in data collection over the holiday period).
- To be eligible, respondents had to either be a fisherman, a fishing vessel owner or an exporter or processor of seafood. Canadian government information was provided by the client for vessel owners and exporters / processors of seafood. Calls to individual fishermen were based on random digit dialing to coastal Newfoundland postal codes.
- In total, 267 individuals were interviewed for the study, of whom 181 held sealing licenses (129 individual fishermen and 52 vessel owners) and which formed the basis for the analyses detailed herein. An insufficient number of exporters / processors (21 in total) were interviewed for inclusion.
- The maximum margin of error associated with a sample of 181 respondents at a 95% confidence level is 7.3%, 19 times out of 20.
- The average survey duration was 7.5 minutes, and the questionnaire was developed by Ipsos.



Respondent Profile

Q. In which of the following fisheries if any does your vessel participate?
Q. For which of the following species if any do you hold fishing licenses?
Base: Sealing License Holders (n=181)

