

Supplementary Material A – Survey design of the CSIRO Tasmanian coasts and seas survey 2025
The ‘CSIRO Tasmanian coasts and seas survey’, was a Tasmania-wide, self-administered paper-based survey, implemented through a two-stage sampling approach.

- Stage 1: stratified purposive sampling identified 200 ‘initial respondents’ based on their alignment with a particular stakeholder group (as identified in Table A1), regional location (Figure 1) and level of expert knowledge/expertise in surveying.
- Stage 2: these ‘initial respondents’ applied snowball sampling by distributing an additional mail questionnaire to four others within their stakeholder group. To assist them in selecting their 4 individuals, each ‘initial respondent was briefed and provided with selection criteria (i.e. place, age, links to their stakeholder group). For example, hypothetically a commercial fisher on Tasmania’s north-coast was required to forward a questionnaire to four other commercial fishers on the north-coast. Or an NGO CEO was required to distribute to 4 other NGO CEO’s within Tasmania. The distribution locations for survey packs are shown in Fig. 1.

A total of 1,000 questionnaires were distributed across Tasmania between 21 April and 21 May 2025, with a 93% return rate. This return rate likely reflected: (i) the high level of public interest in the condition of Tasmania’s coastal waters and seas; (ii) the perceived environmental risks associated with particular marine-based industries; and (iii) the use of existing networks for recruitment.

The questionnaire consisted of 10 sets of closed-ended questions (fixed-alternative questions) that quantitatively assessed:

- the importance participants attributed to a range of marine-based values;
- perceptions of threats to the marine environment;
- concerns relating to coastal and marine health;
- views on the performance of key marine-based industries;
- levels of agreement with statements relating to economic, environmental, management and governance issues; and
- information gaps relating to marine-based matters.

Respondents were provided a section at the end of the questionnaire to add any additional information that they would like to include.

Levels of agreement and importance were measured on a five-point Likert scale with a neutral mid-point. Opinions were also recorded on a five-point scale, where the mid-point represented “neither agree or disagree”. Perceived threats to Tasmania’s coastal waters and seas were measured on a four-point Likert scale, with an additional “unsure” option.

Limitation of sampling approach

A limitation of the sampling approach is the potential for participation bias arising from self-selection and the structure of stakeholder networks:

- Participation was voluntary, which may have increased the representation of individuals who are already interested in, engaged with, or affected by marine issues, while limiting input from less-engaged stakeholders.

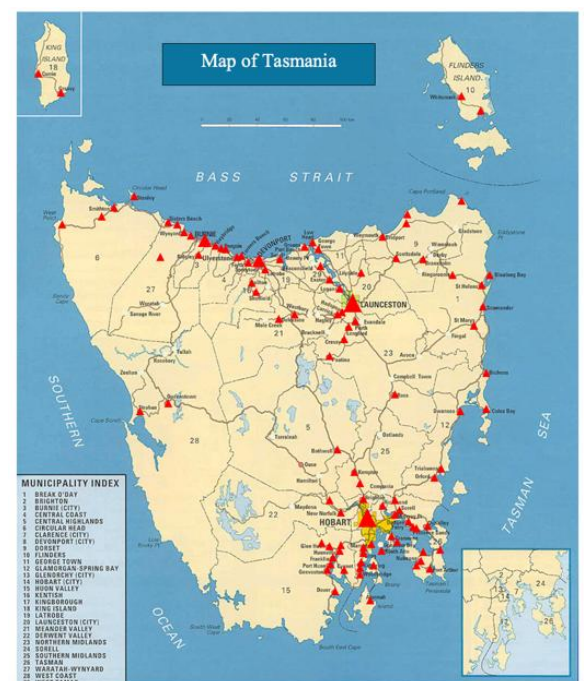


Fig. 1: Map of Tasmania ▲ indicates locations where survey packs were sent.

- The use of existing networks for recruitment may also have contributed to network clustering, whereby participants with similar experiences, perspectives, or professional connections were more likely to be included.
- Stakeholder groups were not equally represented, as sample sizes reflected the relative size of each stakeholder population.

Although considerable effort was made to achieve broad and diverse participation by using stratified purpose sampling for the selection of initial respondents, and detailed selection criteria to guide the snowball sampling (place, age and connection to stakeholder group) the limitations listed above may have influenced the perspectives captured and should be considered when interpreting the findings. To assist the reader to gauge the representativeness of the sample Table A1-A3 provides further information on the stakeholder groups, distribution and age of respondents.

Table A1: Distribution and sample size of each of the stakeholder groups in the study					
Sector	Abbrev.	Description	Sample size	Returned questionnaires	Response rate ²
Aquaculture industry employee or direct supplier	AQ	Individuals that work for a salmon, seaweed or shellfish aquaculture company, or their direct suppliers	120	106	88%
Marine scientist	MS	Work as a marine scientist	100	100	100%
Government/local council employee	G/LC	Work in federal or state government or local council	120	120	100%
Commercial fisher	CF	Work as a commercial fisher (incl. finfish, lobster, abalone)	50	43	86%
Member of advocacy groups and rightsholders ¹	AG	Links to an environmental or Indigenous group ¹	100	86	86%
Marine tourism operator	TO	Providing marine tourism experiences (e.g. fishing, diving, sailing, surfing, foraging tours, other seafood experiences)	40	37	93%
Water enthusiast	Pw	Use Tasmania's beaches and waterways at least weekly to surf, swim, dive, fish, boat, sail or paddle.	240	231	96%
General public	Po	Members of the public not identifying as water enthusiasts	230	208	90%
Total			1000	931	93%

¹ A broad section of the Tasmanian advocacy community including national and state-based environmental organisations, and local groups including coast-care, bird-conservation, and marine-based advocacy. While the views of some Traditional Owners (rightsholders) have been included in this group, there is no intention here to represent the Indigenous voice.

² 'Response rate' indicates the percentage of usable returned questionnaires. Missing values in returned questionnaires were coded as 0.

Table A2: Geographic distribution of respondents compared with ABS¹ census data

	ABS census data (%)	Survey respondents (%)
Greater Hobart area	44	42
Greater Launceston area	12	9
Burnie	3	4
Devonport	4	4
Regional areas	37	41

¹ Australian Bureau of Statistics Census Data

Table A3: Age distribution of respondents compared to ABS census data for the Tasmanian population¹.

	ABS census data (%)	Survey respondents (%)
18-29 years	18	18
30-39 years	18	17
40-59 years	33	32
60-79 years	31	33

1: Proportion in the sample as compared with the proportion in the total Tasmanian population having exclude the 0-18 years and the 80+ year age groups

Coding of questionnaires

- Coding of individual questions is presented in Table A4.

- Calculation of attitudinal certainty

Attitudinal certainty was collected and applied at the individual level. Respondents were asked to score each industry (i.e. salmon aquaculture, seaweed farming, oyster farming) in regard to attribute performance (i.e. responsiveness to community concerns, environmental sustainability, government regulation) and then to indicate how sure they were of their answer (as coded in Table A4).

- In your opinion how are Tasmania's marine industry's performing? and
- How sure are you of your answer?

- Calculation of importance weights

Importance weights for the aquaculture industry were calculated at the individual level – each respondent was asked to score attribute importance.

Statistical software used

Statistical software included Microsoft Excel (Version 16.111.3 (26080215)) and R (4.5.0)2025-04-11).

Ethics approvals

This project was approved by the Social Science Human Research Ethics Committee 207/24) in accordance with the National Statement on Ethical Conduct in Human Research (2007). It was also assessed in accordance with Australian Privacy Principles and the Privacy Act. 'Extended Consent' was sought from all respondents.

Data availability

Data is available: (i) in aggregated form; and (ii) on completion of a CSIRO Data Agreement.

Table A4: Coding of the questionnaire			
Figure	Wording on questionnaire	Coding ¹	Response by question
			No. responses (No. missing responses)
Fig 2a	I think that Tasmania's coastal waters and seas are	1= Bad and getting worse 2= Bad and getting better 3=Not sure 4=Good and getting worse 5=good and getting better	926 (5)
Fig 2b Fig 2c	I am worried about how quickly Tasmania's coastal waters and seas are changing	1=Strongly disagree 2=Disagree 3=Not sure 4=Agree 5=Strongly agree	930 (1)
Fig 2d	In your opinion how are Tasmania's marine industries performing? a) " <i>industry type</i> " is environmentally sustainable	a) 1=Strongly disagree 2=Disagree 3=Neither agree or disagree 4=Agree 5=Strongly agree	a) Salmon: 928 (3) Seaweed: 928 (3) Oysters: 927 (4)
	b) How sure are you of your answer?	b) 1=unsure 2= sure 3=very sure	b) Salmon: 927 (4) Seaweed: 927 (4) Oysters: 928 (3)
Fig 3	In your opinion how are Tasmania's marine industries performing? a) " <i>industry type</i> " is well regulated by government	a) 1=Strongly disagree 2=Disagree 3=Neither agree or disagree 4=Agree 5=Strongly agree	a) Salmon: 927 (4) Seaweed: 927 (4) Oysters: 927 (4)
	b) How sure are you of your answer?	b) 1=unsure 2= sure 3=very sure	b) Salmon: 927 (4) Seaweed: 927 (4) Oysters: 927 (4)
Fig 4a	Regarding the health of Tasmania's coastal waters and seas c) Do you believe that you can influence decisions?	1=Never 2=Rarely 3=Sometimes 4=Frequently	924 (7)
Fig 4b	In your opinion how are Tasmania's marine industries performing? a) The " <i>industry type</i> " responds to community concerns	a) 1=Strongly disagree 2=Disagree 3=Neither agree or disagree 4=Agree 5=Strongly agree	a) Salmon: 926 (5) Seaweed: 927 (4) Oysters: 927 (4)
	b) How sure are you of your answer?	b) 1=unsure 2=sure 3=very sure	b) Salmon: 927 (4) Seaweed: 928 (3) Oysters: 927 (4)

¹ Non-response to a question (or missing values) were coded as 0 for all questions.

Supplementary Material B – Multi-attribute model

Multi-attribute models have been widely adopted and used to explain environmental attitudes and behaviours relating to global warming (Chen, 2015), noise pollution (Sanchez et al., 2018), pasture-raised livestock products (Stampa et al., 2020), natural-resource management (Beyerl et al., 2016; Marshall et al., 2019; Simpson et al., 2016), wild-capture fishing and salmon aquaculture (Alexander and Abernethy, 2019; Carr, 2019; Mazur & Curtis, 2006; Witzling et al., 2020). Here, we have measured the relative attitudinal positions of each individual using the expectancy-value model (Ajzen, 1993; Eaton and Visser, 2008; Stern et al., 1999), wherein an individual's overall attitude to salmon aquaculture (A_i) is the product of how they perceive salmon aquaculture performs on a particular attribute of impact or trust ($P_{i,a}$) and the importance they place on that attribute ($I_{i,a}$), summed over all attributes.

Multi-attribute model:

$$A_i = \sum_a P_{i,a} I_{i,a}$$

Where:

$P_{i,a}$ is the attitude of individual i in relation to attribute a

$I_{i,a}$ is the importance of attribute a to the individual.

The data for $P_{i,a}$ and $I_{i,a}$ were obtained from the Tasmanian coastal waters and seas survey (2025).

Supplementary Material C: Data tables for Figures 2, 3 and 4 by stakeholder group

2a) I think Tasmania's coasts and seas are						
	Bad and getting worse	Bad and getting better	Not sure	Good and getting worse	Good and getting better	Valid responses (Missing values)
Aquaculture industry	8%	4%	25%	46%	18%	106 (0)
Marine scientist	14%	4%	17%	64%	0%	100 (0)
Government/local council	16%	7%	19%	57%	2%	120 (0)
Commercial fisher	10%	7%	24%	48%	14%	43 (0)
Public	10%	4%	50%	32%	4%	206 (2)
Water enthusiast	14%	2%	19%	60%	6%	231 (2)
Advocacy group	32%	1%	11%	52%	5%	85 (1)
Marine tourism	27%	0%	16%	46%	11%	37 (0)

2b) I am worried about how quickly Tasmania's coasts and seas are changing (total sample)						
	Strongly disagree	Disagree	Not sure	Agree	Strongly agree	Valid responses (missing values)
Total sample	1%	7%	21%	43%	28%	930 (1)
2c) I am worried about how quickly Tasmania's coasts and seas are changing (stakeholder group)						
Aquaculture industry	2%	17%	30%	40%	11%	106 (0)
Marine scientist	0%	2%	8%	46%	44%	100 (0)
Government/council	0%	8%	14%	48%	30%	120 (0)
Commercial fisher	0%	9%	19%	56%	16%	43 (0)
Public	1%	8%	34%	41%	15%	208 (0)
Water enthusiast	0%	7%	18%	44%	31%	231 (0)
Advocacy group	0%	2%	12%	29%	56%	85 (1)
Marine tourism	3%	5%	11%	43%	38%	37 (0)

Fig. 2d: Perceptions of the environmental sustainability of aquaculture industries						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (Missing values)
Salmon aquaculture	32%	27%	20%	17%	4%	928 (3)
Seaweed farming	2%	3%	44%	38%	13%	928 (3)
Oyster farming	2%	8%	58%	29%	3%	927 (4)

Fig. 2d/1: Perceptions of the environmental sustainability of salmon aquaculture by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (Missing values)
Aquaculture industry	6%	10%	20%	43%	21%	106 (0)
Marine scientist	21%	33%	31%	14%	1%	100 (0)
Government/local council	26%	35%	23%	16%	0%	120 (0)
Commercial fisher	35%	19%	16%	28%	2%	43 (0)
Public	26%	28%	26%	17%	3%	207 (1)
Water enthusiast	39%	33%	17%	9%	2%	230 (1)
Advocacy group	69%	18%	7%	5%	0%	85 (1)
Marine tourism	51%	22%	3%	19%	3%	37 (0)

Fig. 2d/1: Perceptions of the environmental sustainability of seaweed farming by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Aquaculture industry	1%	2%	21%	46%	30%	106 (0)
Marine scientist	1%	5%	30%	52%	12%	100 (0)
Government/local council	2%	0%	34%	53%	12%	120 (0)
Commercial fisher	2%	2%	49%	37%	9%	43 (0)
Public	0%	3%	63%	24%	9%	207 (1)
Water enthusiast	1%	4%	46%	36%	13%	230 (1)
Advocacy group	8%	8%	49%	28%	6%	85 (1)
Marine tourism	0%	3%	35%	43%	19%	37 (0)

Fig. 2d/: Perceptions of the environmental sustainability of oyster farming by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Aquaculture industry	0%	11%	46%	38%	5%	106 (0)
Marine scientist	0%	9%	59%	31%	1%	100 (0)
Government/local council	3%	9%	56%	31%	2%	120 (0)
Commercial fisher	0%	9%	33%	47%	12%	43 (0)
Public	2%	5%	68%	23%	1%	207 (1)
Water enthusiast	3%	8%	60%	27%	2%	230 (1)
Advocacy group	9%	7%	56%	27%	0%	85 (1)
Marine tourism	3%	3%	54%	32%	8%	37 (1)

Fig 3: Perceptions as to whether aquaculture industries are well regulated						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Salmon aquaculture	34%	27%	17%	17%	6%	927 (4)
Seaweed farming	2%	5%	69%	19%	5%	927 (4)
Oyster farming	2%	6%	54%	32%	6%	927 (4)

Fig. 3/1: Perceptions as to whether salmon aquaculture is well regulated by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Aquaculture industry	8%	11%	11%	43%	25%	106 (0)
Marine scientist	32%	34%	13%	17%	4%	100 (0)
Government/local council	28%	30%	22%	15%	5%	120 (0)
Commercial fisher	42%	21%	14%	19%	5%	43 (0)
Public	24%	29%	30%	13%	4%	207 (1)
Water enthusiast	41%	31%	13%	13%	2%	230 (1)
Advocacy group	71%	19%	2%	7%	0%	84 (2)
Marine tourism	38%	24%	22%	16%	0%	37 (0)

Fig.3/2: Perceptions as to whether seaweed farming is well regulated by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (Missing values)
Aquaculture industry	1%	6%	46%	36%	11%	106 (0)
Marine scientist	1%	9%	67%	19%	4%	100 (0)
Government/local council	1%	4%	68%	22%	6%	120 (0)
Commercial fisher	5%	0%	65%	23%	7%	43 (0)
Public	0%	4%	81%	11%	3%	207 (1)
Water enthusiast	2%	5%	71%	19%	3%	230 (1)
Advocacy group	7%	11%	68%	12%	2%	85 (1)
Marine tourism	3%	3%	67%	25%	3%	36 (1)

Fig.3/3: Perceptions as to whether oyster farming is well regulated by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Aquaculture industry	0%	6%	33%	49%	12%	106 (0)
Marine scientist	0%	7%	42%	48%	3%	100 (0)
Government/local council	1%	8%	52%	31%	8%	120 (0)
Commercial fisher	5%	16%	23%	37%	19%	43 (0)
Public	0%	3%	69%	24%	4%	207 (1)
Water enthusiast	3%	6%	59%	30%	3%	230 (1)
Advocacy group	6%	11%	64%	20%	0%	85 (1)
Marine tourism	6%	0%	47%	36%	11%	36 (1)

Fig 4a: Stakeholder perceptions of their ability to influence industry and government decision-making					
	Never	Rarely	Sometimes	Frequently	Valid responses
Aquaculture industry	8%	45%	42%	4%	106 (0)
Marine scientist	9%	43%	43%	5%	100 (0)
Government/council	13%	39%	43%	6%	119 (1)
Commercial fisher	10%	43%	36%	12%	42 (1)
Public	21%	46%	31%	2%	207 (1)
Water enthusiast	11%	46%	41%	3%	228 (3)
Advocacy group	6%	34%	54%	6%	85 (1)
Marine Tourism	14%	43%	38%	5%	37 (0)

Fig. 4b: Perceptions of the responsiveness of aquaculture industries to community concerns						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Salmon aquaculture	31%	29%	20%	18%	3%	926 (5)
Seaweed farming	2%	3%	68%	22%	4%	927 (4)
Oyster farming	2%	5%	43%	43%	7%	927 (4)

Fig. 4b/1: Perceptions of the responsiveness of salmon aquaculture to community concerns by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Aquaculture industry	7%	14%	21%	44%	14%	106 (0)
Marine scientist	28%	41%	13%	14%	4%	100 (0)
Government/local council	28%	38%	22%	12%	1%	120 (0)
Commercial fisher	28%	26%	26%	19%	2%	43 (0)
Public	22%	26%	29%	20%	3%	207 (1)
Water enthusiast	37%	31%	18%	14%	0%	230 (1)
Advocacy group	71%	18%	7%	4%	0%	84 (2)
Marine tourism	39%	31%	11%	19%	0%	36 (1)

Fig. 4b/2: Perceptions of the responsiveness of seaweed farming to community concerns by stakeholder group						
	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Aquaculture industry	1%	7%	55%	31%	7%	106 (0)
Marine scientist	2%	5%	62%	28%	3%	100 (0)
Government/local council	1%	3%	72%	23%	3%	120 (0)
Commercial fisher	0%	2%	70%	26%	2%	43 (0)
Public	1%	2%	77%	15%	3%	207 (1)
Water enthusiast	1%	2%	67%	24%	5%	230 (1)
Advocacy group	11%	1%	72%	13%	4%	85 (1)
Marine tourism	3%	0%	61%	28%	8%	36 (1)

Fig. 4b/3: Perceptions of the responsiveness of oyster farming to community concerns by stakeholder group

	Strongly disagree	Disagree	Neither agree or disagree	Agree	Strongly agree	Valid responses (missing values)
Aquaculture industry	0%	3%	27%	54%	16%	106 (0)
Marine scientist	1%	5%	30%	53%	11%	100 (0)
Government/local council	1%	4%	42%	44%	9%	120 (0)
Commercial fisher	0%	9%	21%	49%	21%	43 (0)
Public	1%	6%	56%	34%	3%	207 (1)
Water enthusiast	2%	7%	47%	40%	3%	230 (1)
Advocacy group	5%	7%	49%	39%	0%	85 (1)
Marine tourism	3%	3%	33%	53%	8%	36 (1)

Supplementary Material D:

This section provides a conceptual interpretation of how stakeholder expectations of aquaculture companies may change as social risk intensifies. The table is based on the premise that where concerns about environmental impact, governance, or industry conduct are high, stakeholders are less likely to view regulatory compliance alone as sufficient. Instead, expectations tend to shift toward more demonstrable forms of environmental credibility, accountability, responsiveness and precaution. These expectations do not replace formal regulatory requirements but indicate the type of company processes and practices that may become increasingly importance for maintaining legitimacy and trust under conditions of heightened perceived risk (Moffat & Zhang, 2014; Condie 2026b). The table summarises these shifts and their implications for company processes and procedures.

Table D1: Normative expectations placed on the aquaculture industry under increasing levels of social risk	
Stakeholder expectations of the aquaculture industry as social risk is intensified	Implications for company processes and procedures
From minimum environmental standards to Do less harm	• reduce visible environmental harm, • avoid adding to cumulative stress; • demonstrate precaution; and • actively managing environmental risk (not just meeting minimum standards).
From environmental sustainability to Demonstrated environmental credibility	• provide access to monitoring data; • demonstrate independent oversight; • make environmental performance legible to non-experts; and • justify operational decisions.
From compliance to Accountability	• respond to stakeholder concerns even when technically compliant; • acknowledge uncertainty and trade-offs; and • show how stakeholder concerns are incorporated into operational decision-making and practice.
From operational efficiency to Responsiveness to community values and concerns	• early and ongoing engagement; • place-based communication; • responsiveness to local knowledge and values; and • genuine engagement rather than one-way information provision.
From anticipating risks to Demonstrating precaution and foresight	• plan for cumulative and long-term impacts; • demonstrate adaptive management; • show restraint around scale or expansion; and • make future risks part of present decision-making.

Adapted from 'Low conflict pathways for seaweed aquaculture' (Condie, 2026)

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