



Tasmanian Salmonid Growers Association

Community Sentiment Tracking Research 2021

Research Report





enterprise marketing & research services

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Section One

Executive Summary



Executive Summary

Introduction to the Research

In June 2021, the Tasmanian Salmonid Growers Association (TSGA) undertook oversight of a research project to track community sentiment towards the state's aquaculture industry overall, and its salmon farming component in particular. EMRS, an independent research services provider, was commissioned to design and implement the project.

The broad scope of the June 2021 baseline research was to determine community awareness and perceptions of aquaculture and salmon farming in Tasmania via a survey conducted statewide among a representative sample of Tasmanian adults, resident in all regions of the state. The 2021 research round was then to be followed by a series of repeat tracking rounds on a bi-annual basis.

In order to collect the required data to meet all the objectives specified in the research brief, EMRS adopted a quantitative survey methodology utilising Computer Assisted Telephone Interviewing (CATI). The data was collected via a survey questionnaire of around 10 minutes in length, administered by means of both landline and mobile phone interviewing to help achieve a broad and representative coverage of the target population.

The fieldwork took place from the 27th of May to the 7th of June 2021. The target sample size was achieved, with n=1,000 Tasmanian adults aged 18 years and over being successfully surveyed.

The following report presents the findings of the 2021 quantitative research. The data gathered and analysis of the results are provided in detail in the body of the report, while this summary presents the key informational insights gained.



Executive Summary

Importance Ranking of the Tasmanian Aquaculture Industry (All respondents, n=1,000)

The clear majority of respondents gave the highest scores of “4” or “5” when rating the importance of the aquaculture industry to Tasmania.

- **72% TOTAL IMPORTANT**
 - 45% highest score of “5”
 - 28% next highest score of “4”
- 18% neutral score of “3”
- **9% TOTAL NOT IMPORTANT**
 - 4% lowest score of “1”
 - 4% next lowest score of “2”
- 1% “unsure”

**NET IMPORTANCE
SCORE[†]**
2021
+64

A Net Importance Score of +64 is classified as “excellent”.

It was also positive to note that the respondents were most likely to rate the importance of the aquaculture industry with a top score of “5” (45%).

Reasons for Regarding the Aquaculture Industry as Important to Tasmania (Respondents giving high importance scores of “4” or “5”, n=721)

Unprompted, the reason given most frequently by far for attributing a high level of importance to the industry was:

- *Generates and provides jobs/ employment* (60%)
followed by:
- *Generates income for Tasmania as a whole/ the state’s economy* (25%)
- *Provides a good food source* (24%)
- *Contributes to Tasmania’s export sector* (15%)
- *Generates income for local areas/ local economies* (12%)
- *Supplies a high quality/ healthy food product* (11%)

The two most common themes to emerge were the industry’s importance in relation to jobs and the economy; and its provision of a good food source.

Reasons for Regarding the Aquaculture Industry as Not Important to Tasmania (Respondents giving low importance scores of “1” or “2”, n=91)

Unprompted, the reason given most frequently by far for attributing a low level of importance to the industry was:

- *Impact on the local environment* (36%)
followed by:
- *Polluting the water/ overuse of water* (14%)
- *Not a big employer/ good employer* (12%)

Environmental factors emerged as the primary reason for regarding the industry as not important.

[†]The net importance score was arrived at by subtracting the total percentage of those who gave low importance scores of “1” or “2” from the total percentage who gave high scores of “4” or “5”.



Executive Summary

Awareness of the Tasmanian Salmon Farming Industry

(All respondents, n=1,000)

The clear majority of respondents confirmed they were aware of the Tasmanian salmon farming industry to some degree.

- **92% TOTAL AWARE**
 - 47% “definitely aware”
 - 45% “somewhat aware”
- **8% TOTAL UNAWARE**

Total awareness stood at a very high level, with a significantly large proportion specifying that they were “definitely aware”.

Among the relatively small proportion stating websites in general as a channel of awareness (n=43), most frequently specified were:

- *Tassal website* (16%)
- *Facebook/ other social media* (16%)
- *ABC* (12%)
- *Huon Aquaculture website* (11%)

The “*Petuna Seafood website*” was mentioned by 5%.

Channels of Awareness of the Salmon Farming Industry

(Respondents aware of the industry, n=943)

The channels of awareness mentioned most frequently were:

- *Television reports* (42%)
- *Newspaper articles* (32%)
followed by:
- *Television ads* (24%)
- *Word of mouth* (24%)
- *Newspaper ads* (19%)
- *Know people in the industry* (18%)
- *Facebook* (17%)

Media reports and articles recorded particularly high rates of mention, indicating widespread reporting on the industry of which the public has taken note.

To be noted also, here and elsewhere in the survey, was the relatively high rate of mention of “Facebook”, and particularly so among the younger age cohorts of 25 to 34 years.



Executive Summary

Support for or Opposition to the Tasmanian Salmon Farming Industry (All respondents, n=1,000)

The majority of respondents stated that they supported the Tasmanian salmon farming industry to some degree.

- **54% TOTAL SUPPORT**
 - 31% “strongly support”
 - 23% “somewhat support”
- 24% neutral
- **18% TOTAL OPPOSE**
 - 11% “strongly oppose”
 - 7% “somewhat oppose”
- 4% “unsure”

**NET SUPPORT
SCORE^(†)
2021
+36**

Positively, a Net Support Score of +36 lies in the 0 to +49 range which is classified as “good”.

Of those in support of the industry, the somewhat larger proportion specified that they supported it “strongly” (31%).

Among the sample of respondents who opposed the industry, only a very marginally larger proportion did so “strongly” (11%).

Reasons for Supporting the Salmon Farming Industry (Respondents in support of the industry, n=560)

Unprompted, the reason provided most frequently by far for supporting the industry was:

- *Generates and provides jobs/ employment* (67%)
followed by:
- *Generates income for Tasmania as a whole/ the state’s economy* (31%)
- *Provides a good food source* (21%)
- *Generates income for local areas/ local economies* (17%)
- *Supplies a high quality/ healthy food product* (16%)
- *Contributes to Tasmania’s export sector* (13%)

Here two themes again emerged most strongly: namely, the industry’s contribution to jobs and the economy; and its provision of a good food source.

Reasons for the Neutral Position on the Salmon Farming Industry (Respondents neutral in their position on the industry, n=220)

Unprompted, the reasons provided most frequently by far for holding a neutral position on the industry were:

- *Don’t know enough about it* (26%)
- *Impact on the local environment* (24%)

Apart from a lack of knowledge, the reasons given were wide-ranging, covering primarily various environmental concerns, but also some mentions of positive aspects of the industry.

[†]The net support score was arrived at by subtracting the total percentage of those who opposed the Tasmanian salmon farming industry from the total percentage who supported it.
This score will continue to be tracked in the subsequent research rounds.



Executive Summary

Reasons for Opposing the Salmon Farming Industry

(Respondents in opposition to the industry, n=190)

Unprompted, the reason given most frequently by far for opposing the industry was:

- *Negative impacts on the environment – in general* (74%)
followed more specifically by:
- *Negative impacts on wildlife/ wild fish/ marine life* (47%)
- *Poor water quality impacts* (28%)
- *Failure to meet environmental standards/ scientific guidelines* (25%)
- *Poor health/ welfare/ protection of the salmon* (20%)

These responses identified key areas where there is a call for greater public understanding of and reassurance on the salmon farming industry.

Perception that the Public Needs More information on the Salmon Farming Industry

(All respondents, n=1,000)

A significantly higher proportion of respondents went on to state that they felt the public in general needed to know or understand more about the industry.

- **87% TOTAL YES**
 - 57% “yes – definitely”
 - 29% “yes – somewhat”
- **10% TOTAL NO**
- 3% “unsure”

The strength of this perception was further evidenced in well over one half of the sample stating “yes – definitely”.

Call for More information on the Salmon Farming Industry

(All respondents, n=1,000)

The respondents were fairly evenly divided between those who personally wanted to know or understand more about the industry and those who did not.

- **48% TOTAL YES**
 - 22% “yes – definitely”
 - 26% “yes – somewhat”
- **51% TOTAL NO**
- 1% “unsure”

What the Public Needs to Know or Understand about the Salmon Farming Industry

(Respondents stating the public needs to know more, n=866)

Unprompted, the aspect of more public information on the industry mentioned most frequently was:

- *Impact on the environment/ waterways* (37%)
followed, at a much lower rate of mention, by:
- *General honesty/ transparency/ facts* (10%)

The further responses were very wide-ranging, each mentioned by samples of 9% or less. They provide additional insights on what could be communicated more clearly to the public (see Chart 13, p.24).

Best Channels for Providing Information about the Salmon Farming Industry

(Respondents stating they or the public needs to know more, n=918)

The channel most frequently nominated for best communicating information about the industry was:

- *Television reports* (49%)
followed by:
- *Facebook* (38%)
- *Newspaper articles* (33%)
- *Television ads* (33%)
- *Newspaper ads* (24%)
- *Instagram* (21%)



Two key findings emerged:

- Firstly, a preference for modes of communication, such as reports and articles, suited to providing detailed information; and
- Secondly, the strong continuing role of traditional media as channels of communication, coupled with the growing role of social media. In the case of the latter, especially among the younger demographic of those aged 18 to 34 years.

Direct Connections with the Salmon Farming Industry in Tasmania

- The clear majority of all respondents (n=1,000) reported that **“no”**, they did not themselves have experience of working in the salmon farming industry or as a service provider to the industry (92%).

Similarly small samples confirmed that **“yes”** they worked in the industry (3%), or were service providers to the industry (5%).

- Among the sample of respondents with personal experience of working in the industry or being a service provider (n=81), the nature of the work covered a wide range of roles and activities, each mentioned by 10% or less.

Chart 16, p.28 presents the responses given.

- A significantly greater proportion of the full sample of respondents (n=1,000) said **“yes”**, they knew someone else working in the salmon farming industry (41%), or who was a service provider to the industry (12%).

Just over one half of the sample said **“no”**, they did not (52%).

- Among the sample knowing someone working in the industry or being a service provider (n=482), the nature of the work, likewise, covered a wide range of roles and activities, each mentioned by 11% or less.

Chart 18, p.31 presents the responses given.



Executive Summary

Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania

(All respondents, n=1,000)

All respondents were read several specific elements of the salmon farming industry to best contribute to Tasmania and engage with the Tasmanian community. They were asked to rate each as to its importance on a scale of 1 to 5, with 1 denoting “not important at all” and 5 denoting “very important”.

TOTAL	IMPORTANT	NEUTRAL	TOTAL	NOT IMPORTANT	UNSURE
Maintain high animal health and welfare standards	94%	2%	2%	1%	
Protect the natural environment and wildlife	93%	3%	3%	1%	
Provide a high-quality, healthy food product	93%	3%	3%	1%	
Public transparency and reporting on its operations	88%	8%	3%	1%	
Maintain sustainable fish stocks	87%	5%	5%	3%	
Generate income for the local economy	84%	10%	5%	1%	
Generate and provide training, jobs and employment	84%	11%	5%	1%	
Support Tasmania’s regions and regional communities	79%	12%	7%	1%	
Support of local community events and groups	60%	25%	13%	2%	
Community sponsorships and partnerships	56%	26%	15%	3%	

To be noted:

- In all instances, the total proportion of respondents giving the highest importance scores of “4” or “5” were in the clear majority, ranging from 56% up to 94%.
- In comparison to the importance percentages attributed to elements respondents mentioned previously without prompting, here, on being prompted:
 - The highest importance tended to be attributed to elements regarding animal welfare, environmental protection, and the provision of a good food product.
 - Significantly high importance levels were also recorded for public transparency and reporting, along with the maintenance of sustainable fish stocks.
 - The five top elements in terms of TOTAL importance were also significantly more likely to be rated with the highest score of “very important”.
 - The next highest importance grouping emerged for elements in relation to the economy, employment, and regional support.
 - Support of community events, groups, sponsorships and partnerships were ranked lowest in importance, due, in part, to a significantly large proportion of respondents holding a neutral position on these elements.

A key finding to be noted demographically was that **female** respondents were significantly more likely to rate as **important** at some level:

- **Protect the natural environment and wildlife** (96% in total, compared to 91% of males); and
- **Public transparency and reporting on its operations** (93% in total, compared to 83% of males).

Section Two

Introduction



Background to and Scope of the Research

Background to the Research

The Tasmanian Salmonid Growers Association (TSGA) is Tasmania's peak industry body representing growers throughout the state. In June 2021, the TSGA undertook oversight of a research project to track community sentiment towards the state's aquaculture industry overall, and its salmon farming component in particular.

EMRS, an independent Tasmanian-based research services provider, was commissioned to design and conduct the research project.

Scope of the Research

The broad scope of the June 2021 baseline research was to determine community awareness and perceptions of aquaculture and salmon farming in Tasmania via a survey conducted statewide among a representative sample of Tasmanian adults, resident in all regions of the state.

The baseline research was then to be followed by a series of repeat Community Sentiment Tracking rounds on a bi-annual basis, including the determination of any shifts in the perceived importance of the Tasmanian aquaculture industry as a whole, and in the level of support for the salmon farming industry in particular.

In line with the research brief, EMRS provided recommendations on the most appropriate methodology; and undertook the design of the survey instrument, the conduct and management of the fieldwork, and full analysis of and reporting on the survey results.



Objectives of the Research

Objectives of the Research

The specific objectives of the June 2021 research were to:

- Determine the level of importance placed on the Tasmanian aquaculture industry;
- Explore the perceived positives and negatives to Tasmania of the aquaculture industry;
- Measure the awareness levels of the Tasmanian salmon farming industry, and
 - for those aware, the channels of their awareness;
- Determine the level of support for or opposition to the Tasmanian salmon farming industry;
- Explore the main reasons for supporting, being neutral towards, or opposing the Tasmanian salmon farming industry;
- Explore the perceptions of the provision of information, personally and to the community, about the Tasmanian salmon farming industry;
- Determine areas where the provision of information could be improved;
- Establish where information on the salmon industry is sourced;
- Explore direct connections with the salmon farming industry in Tasmania; and
- Measure the perceived importance of the salmon farming industry's future contribution and engagement with the Tasmanian community.



The Research Methodology

The Research Methodology

In order to collect the required data to meet all the objectives specified in the research brief, EMRS adopted a quantitative survey methodology utilising Computer Assisted Telephone Interviewing (CATI). The data was collected via a survey questionnaire of around 10 minutes in length, administered by means of both landline and mobile phone interviewing to help achieve a broad and representative coverage of the target population.

The phone survey was conducted utilising EMRS' in-house call centre, ensuring high levels of efficiency and quality control. The fieldwork took place between the 27th of May and the 7th of June 2021.

The target population was based on 400,777 Tasmanian residents aged 18 years and over (ABS, 2016). In total, a sample of n=1,000 completed the survey, yielding overall results accurate to within ± 3.10 percentage points at the 95% confidence level.

In order to gain a sample representative of the Tasmanian adult population, quotas were put in place for gender, age and region. Where the quotas were not achieved, weighting was applied to the results to ensure they were accurate in reflecting the demographic profile of the population.

Note on the Reporting

The following report presents the findings of the quantitative research, with results presented in charts and tables. Any statistically significant variations in the results across the population subgroups have been remarked upon in the commentary accompanying the charts and tables. In addition, table cells that have been highlighted in colour denote a statistically significant variation in the results.



The People Interviewed

The People Interviewed

Between the 27th of May and the 7th of June 2021, a total of n=1,000 Tasmanian adults were surveyed, comprising of the demographic subgroups shown below.

Table 1 – Gender
(Number & percentage of respondents)†

Gender	Number	Percentage
Total	1,000	100
Male	446	45
Female	554	55

Table 2 – Region
(Number & percentage of respondents)*†

Region	Number	Percentage
Total	1,000	100
South	537	54
North	226	23
North West	237	24

*Percentages here do not sum to 100 due to rounding.

Table 3 – Age
(Number & percentage of respondents)†

Age	Number	Percentage
Total	1,000	100
18 to 24 years	36	4
25 to 34 years	81	8
35 to 44 years	145	15
45 to 54 years	210	21
55 to 69 years	304	30
70 years and over	224	22

†Numbers and percentages in these tables are unweighted. Elsewhere in the report, the percentage figures have been weighted to accurately reflect the demographic profile of the target population.

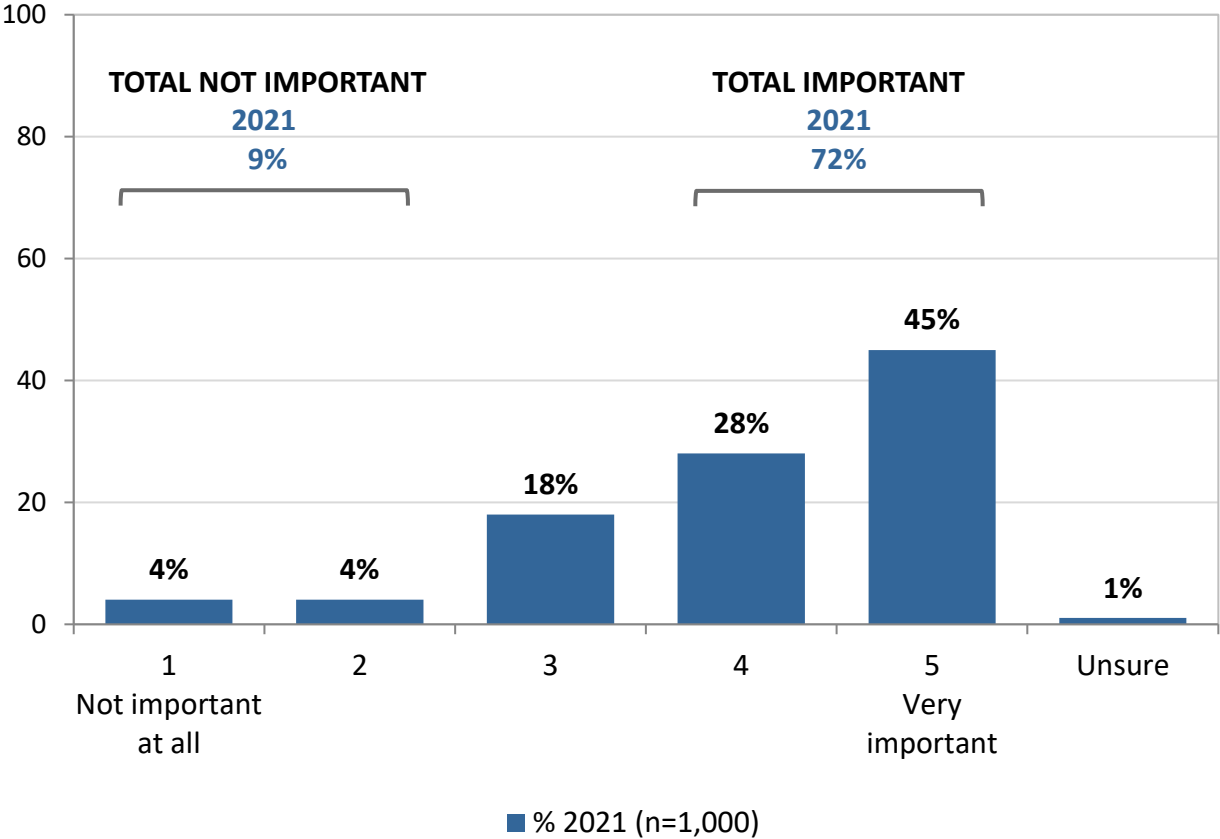
Section Three

Importance of the Tasmanian Aquaculture Industry



Importance Ranking of the Tasmanian Aquaculture Industry

Chart 1 – Importance Ranking of the Tasmanian Aquaculture Industry
(Percentage of all respondents)*



In 2021, a combined total of 72% of the full sample of respondents rated the aquaculture industry as important to Tasmania with the top scores of “4” or “5” out of 5.

Just 9% in total rated it as not important with scores of “1” or “2”.

It was very positive to note that the respondents in 2021 were most likely to rate the importance of the aquaculture industry with a top score of “5” (45%).

NET IMPORTANCE SCORE^(†)

2021
+64

A Net Importance Score of +64 is classified as “excellent”.

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

Q. Thinking specifically about the Tasmanian aquaculture industry, please rate how important you think it is to Tasmania, on a scale of 1 to 5, where 1 is “not important at all” and 5 is “very important”.

*Percentages may not sum to 100 due to rounding.

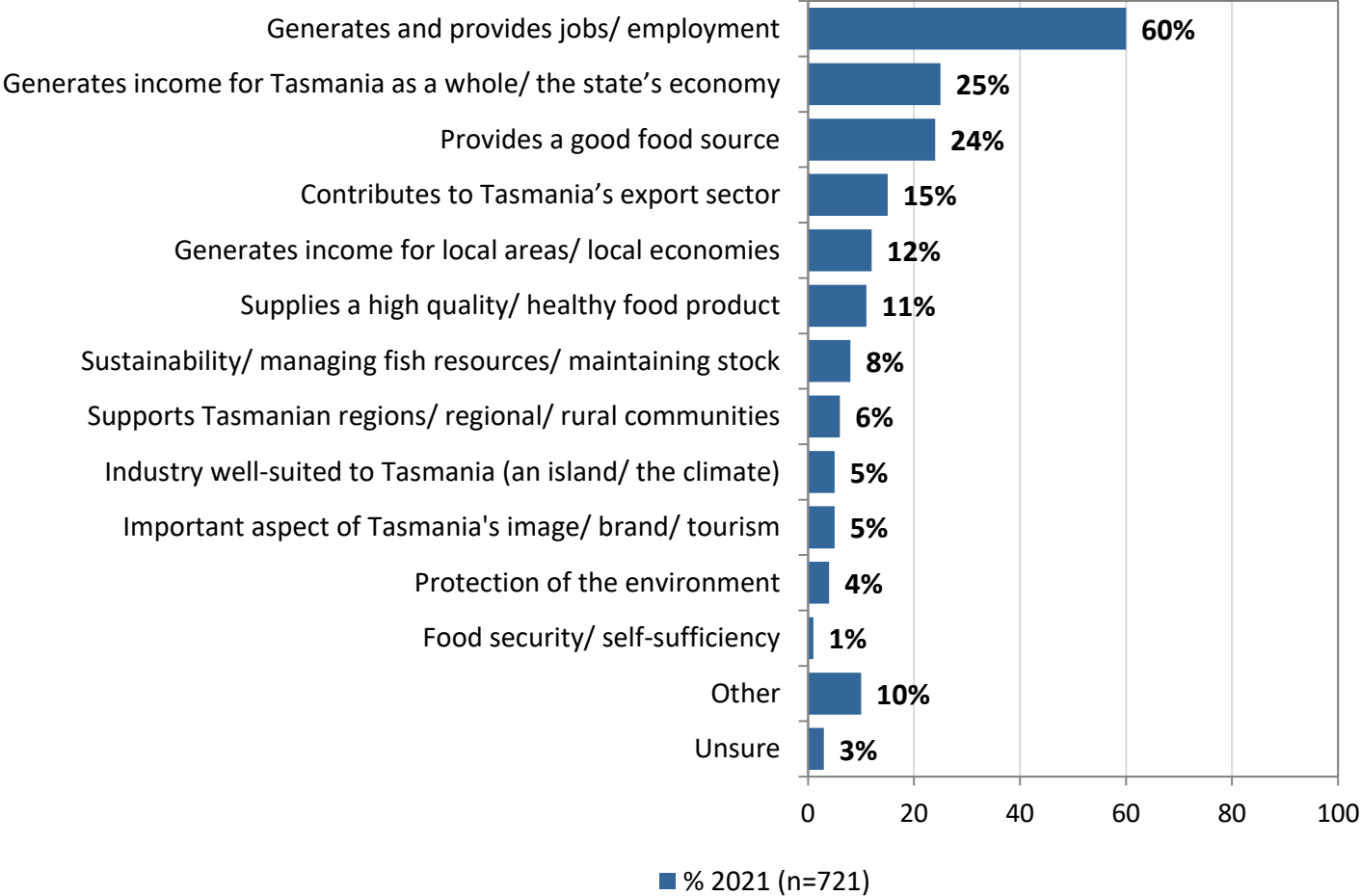
†The net importance score was arrived at by subtracting the total percentage of those who gave low importance scores of “1” or “2” from the total percentage who gave high scores of “4” or “5”.



Why the Aquaculture Industry is Important to Tasmania

High Importance Scores 4 to 5

Chart 2 – Why the Aquaculture Industry is Important to Tasmania
(Percentage of respondents ranking it as important with scores of “4” or “5”)*



Among the respondents who gave the highest scores of “4” or “5” for the importance of the aquaculture industry to Tasmania, the reason they mentioned most frequently by far was that “it generates and provides jobs/ employment” (60%).

A further economic benefit was cited next most frequently: namely, that it “generates income for Tasmania as a whole/ the state’s economy” (25%).

It “provides a good food source” recorded a similarly high rate of mention (24%).

By demographic group:

- Respondents aged 18 to 34 years were significantly more likely to be unsure as to why they found the aquaculture industry important (10% in total).

*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

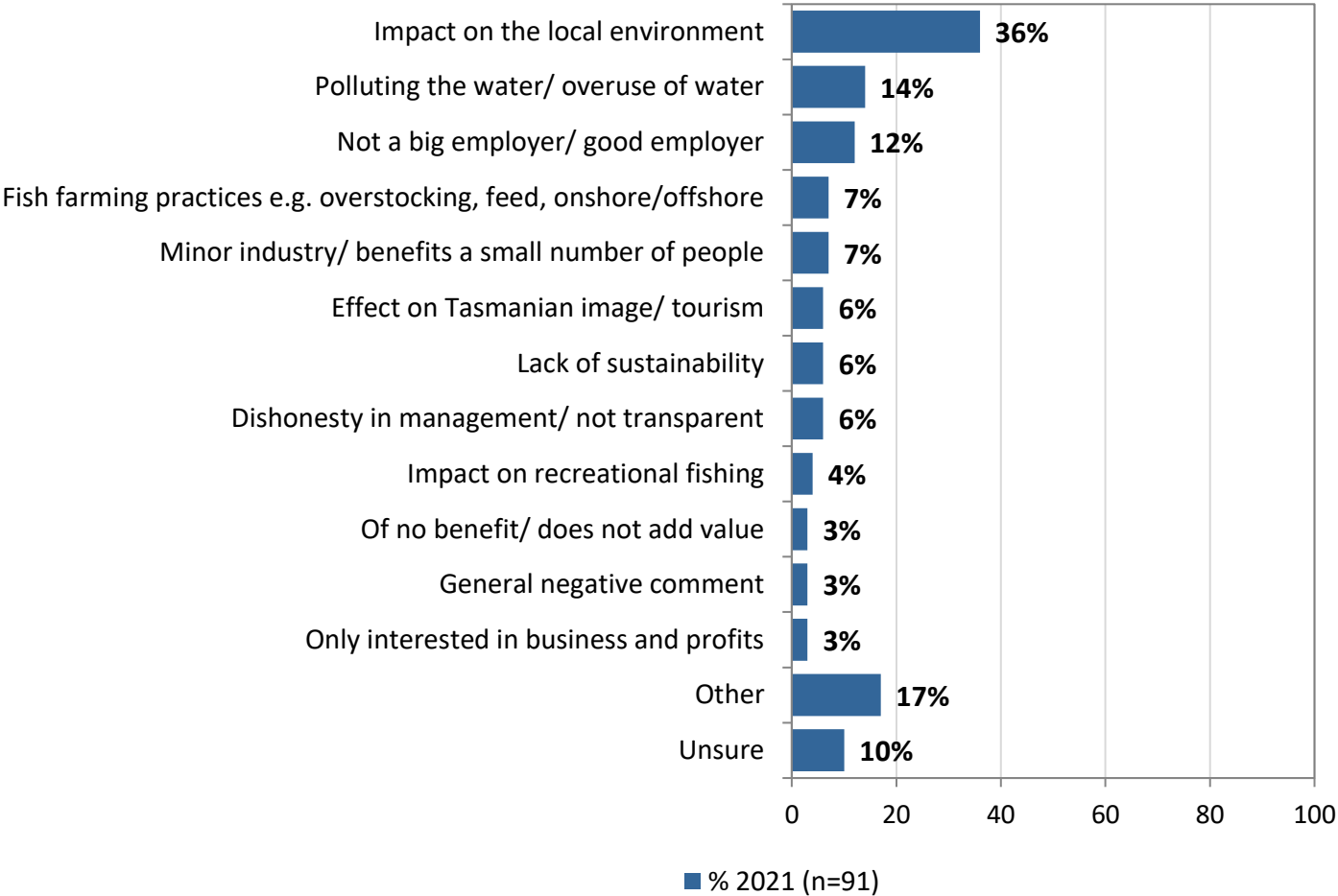
Q. Why is the aquaculture industry important to Tasmania?



Why the Aquaculture Industry is Not Important to Tasmania

Low Importance Scores 1 to 2

Chart 3 – Why the Aquaculture Industry is Not Important to Tasmania
(Percentage of respondents ranking it as not important with scores of “1” or “2”)*



Among the smaller sample of respondents who ranked the Tasmanian aquaculture industry at the lowest importance scores of “1” or “2”, the reason they mentioned most often by far was its “impact on the local environment” (36%).

A more specific environmental aspect was cited next most frequently: namely, it “polluting the water/ the overuse of water” (14%).

“Not a big employer/ good employer” recorded a similar rate of mention (12%).

It is to be noted that the above responses, as well as all those recorded in the chart, should be regarded as indicative only, as they were each provided by relatively small samples.

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

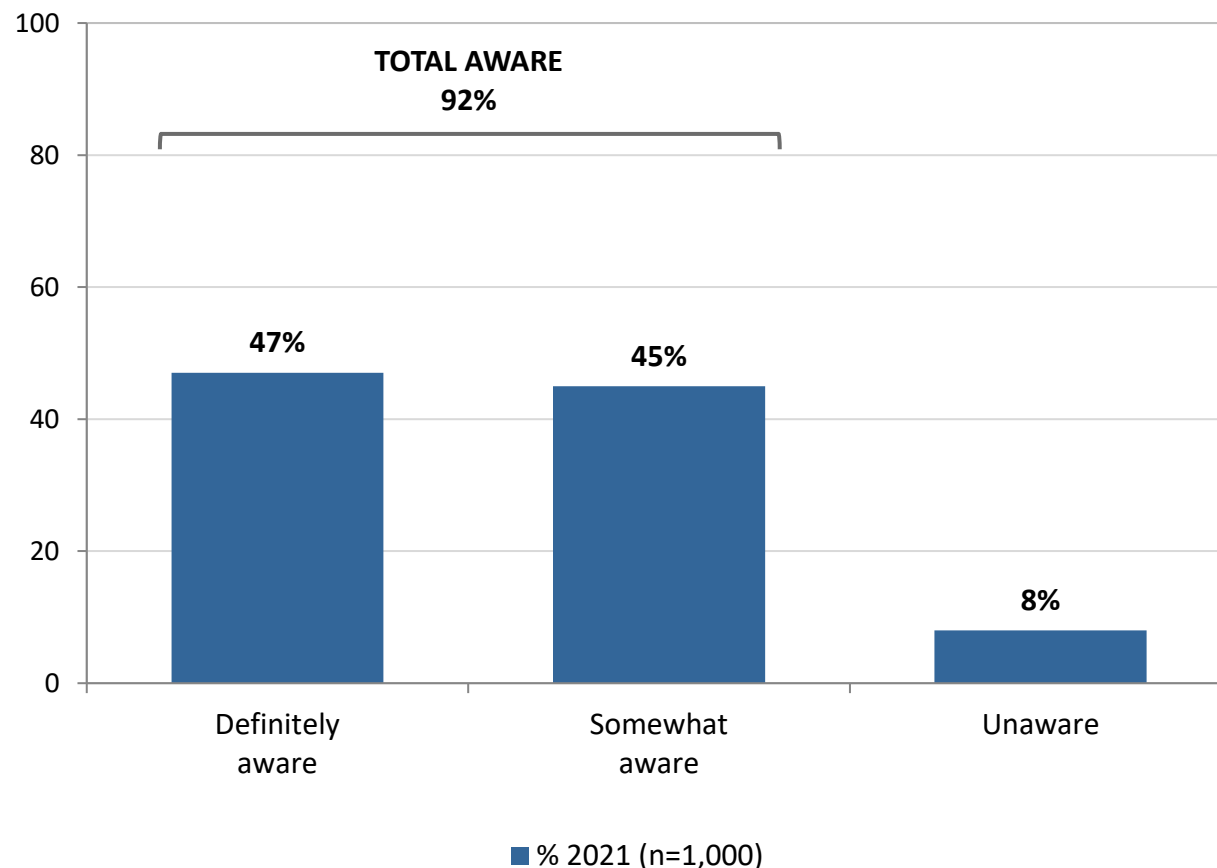
Q. Why is the aquaculture industry not important to Tasmania?

Section Four

Awareness of the Tasmanian Salmon Farming Industry

Awareness of the Tasmanian Salmon Farming Industry

Chart 4 – Awareness of the Tasmanian Salmon Farming Industry
(Percentage of all respondents)*



The clear majority of the full sample of respondents confirmed that they were aware of the Tasmanian salmon farming industry to some degree (92% in total).

Among these, the responses were almost equally divided between those who stated they were “definitely aware” (47%) and those who stated they were “somewhat aware” (45%).

A relatively small proportion said they were “unaware” (8%).

By demographic group:

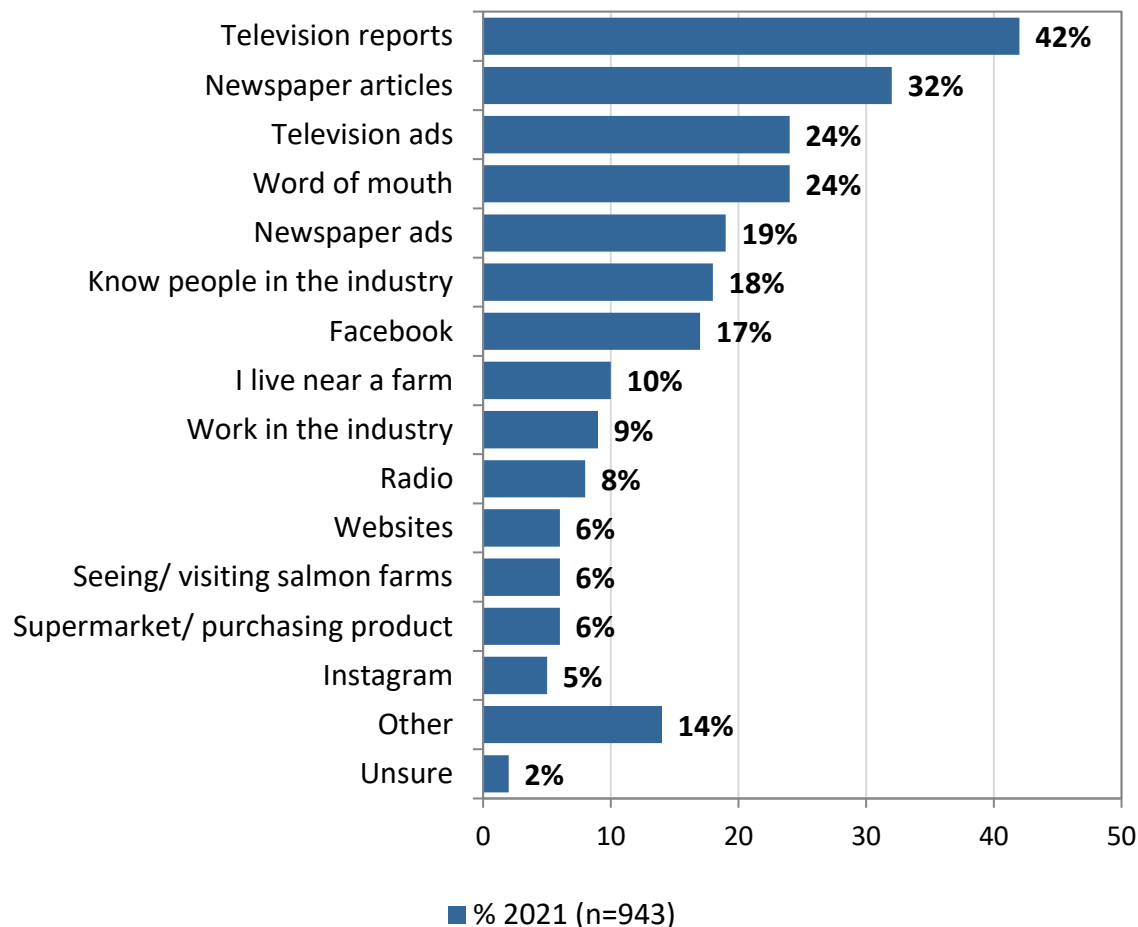
- Respondents aged 55 years and over were significantly more likely to be **aware of the Tasmanian salmon farming industry** (96% in total, 55% of whom were “definitely aware”), compared to those aged 18 to 34 years (81%, 30% of whom were “definitely” aware).
 - Respondents aged 18 to 34 years were significantly more likely to be **unaware** (19%).

*Percentages may not sum to 100 due to rounding.

Q. Thinking about the state’s aquaculture, how aware are you of the Tasmanian salmon farming industry?

Channels of Awareness of the Salmon Farming Industry

Chart 5 – Channels of Awareness of the Salmon Farming Industry
(Percentage of respondents “definitely” or “somewhat” aware of the salmon farming industry)*



Among the respondents aware of the salmon farming industry, the most frequently reported channel of their awareness was “television reports” (42%), followed by “newspaper articles” (32%).

A significant proportion of one in four cited “television ads” and “word of mouth” (24% in each case).

Relatively high rates of mention were also recorded for “newspaper ads” (19%), “know people in the industry” (18%), and “Facebook” (17%).

“Other” channels mentioned by 2% of respondents or less included:

- “Book/ Richard Flanagan’s *Toxic*”, “YouTube”, “media (non-specific)”, “Snapchat”, “involved in recreational/ commercial fishing”, and “school/ university”.

*Percentages do not sum to 100 due to multiple responses being possible.

Q. Through which channels have you become aware of the Tasmanian salmon farming industry?



Channels of Awareness of the Salmon Farming Industry

Population Subgroup Variations

On analysing the responses across the population subgroups, the following findings were noted.

Facebook

By age group:

- Significantly more likely to report becoming aware of the Tasmanian salmon farming industry through **Facebook**, were those aged 25 to 34 years (31%), compared to those aged 55 years and over (9%).

55 Years and Over

By age group, respondents aged 55 years and over were:

- Significantly more likely to report becoming aware of the Tasmanian salmon farming industry through **television reports** (50%), and **newspaper articles** (41%).

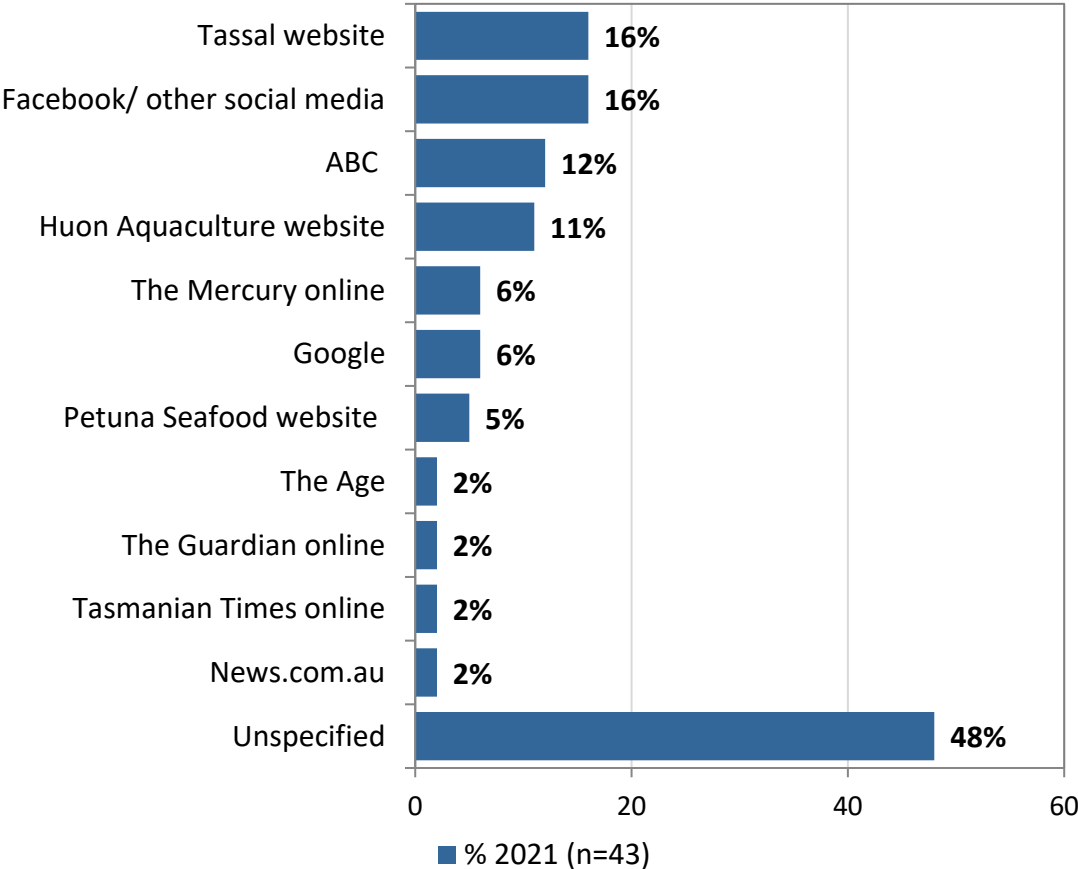
Q. Through which channels have you become aware of the Tasmanian salmon farming industry?



Channels of Awareness of the Salmon Farming Industry

Specific Websites

Chart 6 – Channels of Awareness of the Salmon Farming Industry – **Specific Websites**
(Percentage of respondents “definitely” or “somewhat” aware of the salmon farming industry, and citing “websites” as a channel of awareness)*†



The respondents who had mentioned “websites” as a channel of their awareness of the salmon farming industry were most likely to specify the “Tassal website” and “Facebook/ other social media” (16% in each case).

The “ABC” was the most frequently cited news media website (12%).

Websites related to other salmon farming companies recorded somewhat lower rates of mention than Tassal: namely, “Huon Aquaculture” (11%), and “Petuna Seafood” (5%).

All responses here should be regarded as indicative only, due to the small overall sample size.

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

Q. Through which websites have you become aware of the industry?

*Percentages do not sum to 100 due to multiple responses being possible.
†Responses should be treated with caution due to the relatively small size of the sample.

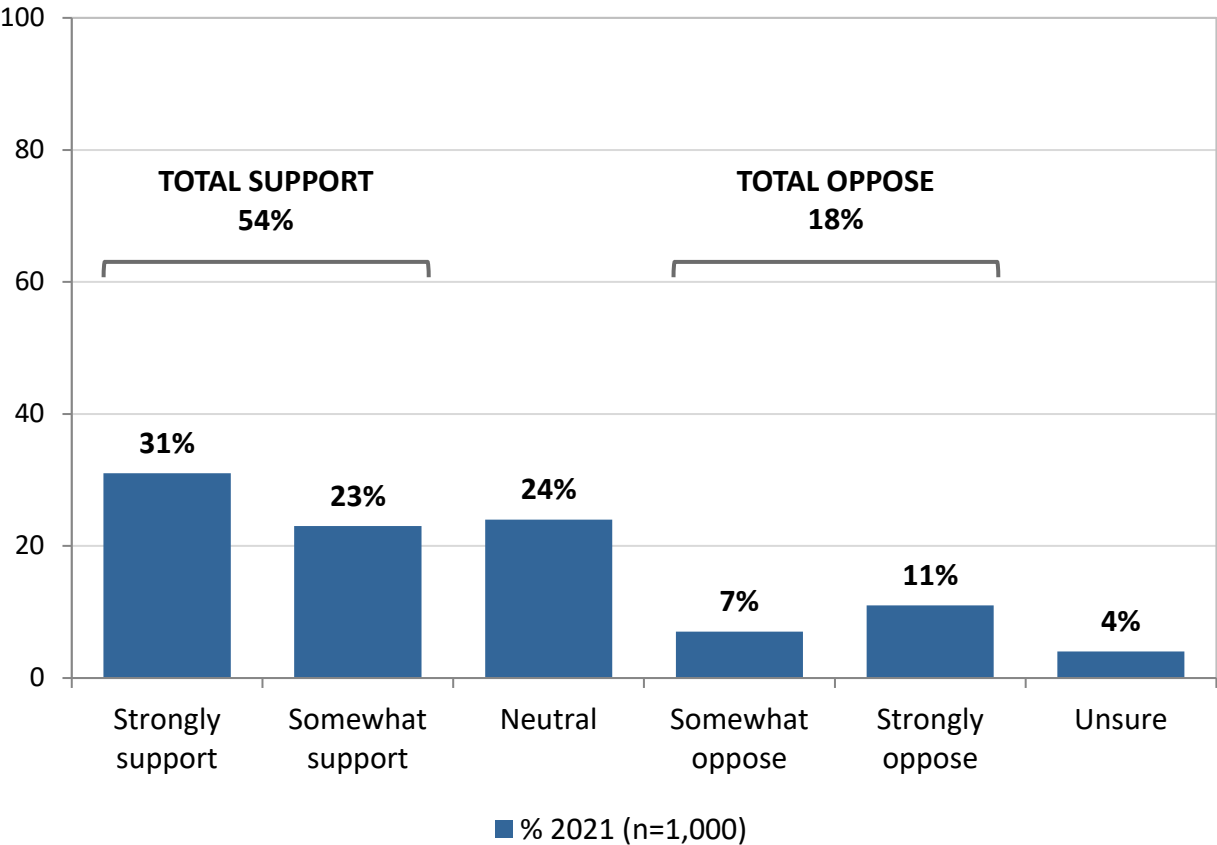
Section Five

Support for or Opposition to the Tasmanian Salmon Farming Industry



Support for or Opposition to the Tasmanian Salmon Farming Industry

Chart 7 – Support for or Opposition to the Tasmanian Salmon Farming Industry
(Percentage of all respondents)



Positively, the majority of the full sample of respondents stated that they supported the Tasmanian salmon farming industry to some degree (54% in total).

Of these, the somewhat greater proportion reported that they supported it “strongly” (31%).

Among the total sample of 18% of respondents who opposed the industry, only a marginally larger proportion did so “strongly” (11%).

NET SUPPORT SCORE^(†)
2021 +36

Excluding the 24% of respondents who were “neutral” towards the Tasmanian salmon farming industry and the 4% who were “unsure”, the levels of support and opposition yielded a positive Net Support Score of +36.

[†]The net support score was arrived at by subtracting the total percentage of those who opposed the Tasmanian salmon farming industry from the total percentage who supported it. This score will continue to be tracked in the subsequent research rounds.

Q. Overall, do you support or oppose the Tasmanian salmon farming industry? If you hold a neutral view or you’re unsure, that’s fine, just say so.



Support for or Opposition to the Salmon Farming Industry

Population Subgroup Variations

On analysing the responses across the population subgroups, the following findings were noted.

18 to 34 Years

By age group, respondents aged 18 to 34 years were:

- Significantly less likely to state they were in **support** of the Tasmanian salmon farming industry (41%); and
- Significantly more likely to hold a **neutral** position (36%), compared to those aged 55 years and over (19%).

Females

By gender, female respondents were:

- Significantly more likely to state they were in **opposition** to the Tasmanian salmon farming industry (22% in total, 14% of whom were “strongly” opposed), compared to male respondents (14% in total, 8% of whom were “strongly” opposed).

Males

By gender, male respondents were:

- Significantly more likely to state they were in **support** of the Tasmanian salmon farming industry to some degree (63% in total, 39% of whom were “strongly” in support), compared to female respondents (46% in total, 24% of whom were “strongly” in support).

North West Residents

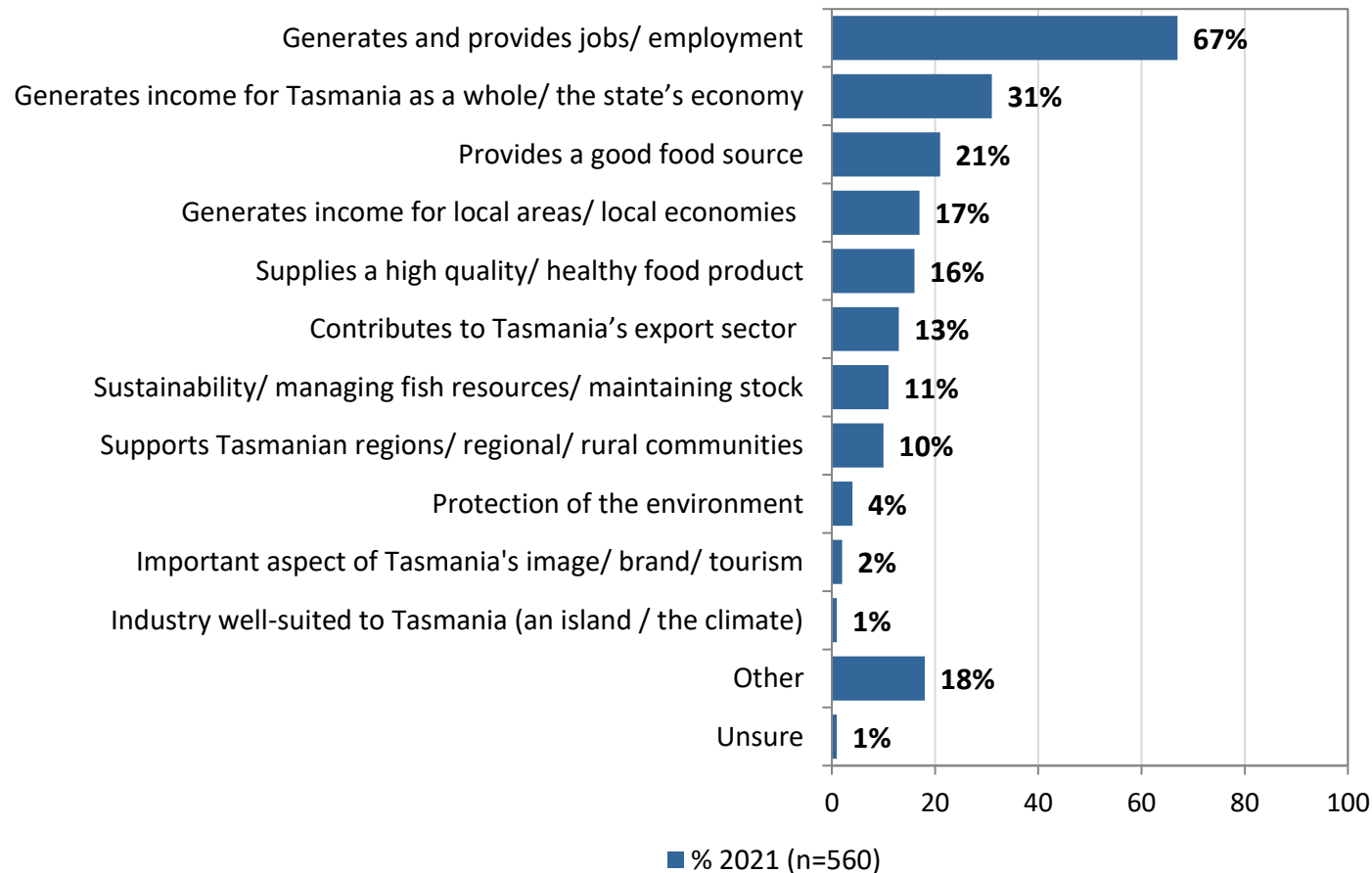
By region, respondents resident in the North West were:

- Significantly more likely to state they were in **support** of the Tasmanian salmon farming industry (65% in total, 43% of whom were “strongly” in support), compared to those in the South of the state (48% in total, 25% of whom were “strongly” in support).

Q. Overall, do you support or oppose the Tasmanian salmon farming industry? If you hold a neutral view or you're unsure, that's fine, just say so.

Reasons for Supporting the Salmon Farming Industry

Chart 8 – Reasons for Supporting the Salmon Farming Industry
(Percentage of respondents “definitely” or “somewhat” in support of the salmon farming industry)*



Among the respondents in support of the Tasmanian salmon farming industry, the reason they cited most frequently by far coincided with that for the importance of the aquaculture industry as a whole: namely, that “it generates and provides jobs/ employment” (67%).

Further economic benefits were also again cited frequently. Most notably, that it “generates income for Tasmania as a whole/ the state's economy” (31%).

It “provides a good food source” also recorded a high rate of mention (21%).

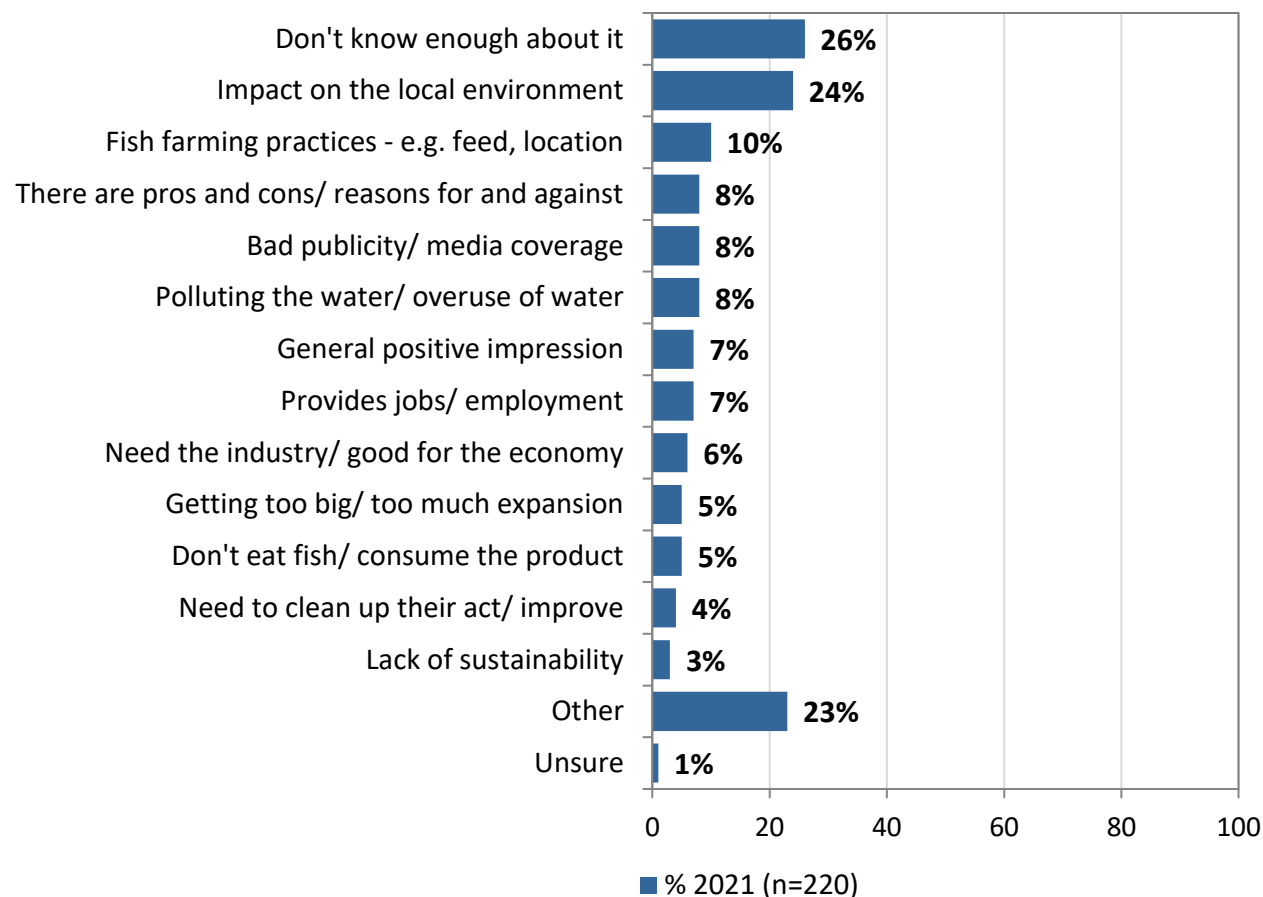
There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

Q. What are your main reasons for supporting the Tasmanian salmon farming industry?

*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

Reasons for the Neutral Position on the Salmon Farming Industry

Chart 9 – Reasons for the Neutral Position on the Salmon Farming Industry
(Percentage of respondents “neutral” in their position on the salmon farming industry)*



The respondents who were neutral towards the Tasmanian salmon farming industry most frequently stated “don’t know enough about it” as their reason (26%).

Among the concrete reasons provided, the “impact on the local environment” recorded by far the highest rate of mention (24%).

By demographic group:

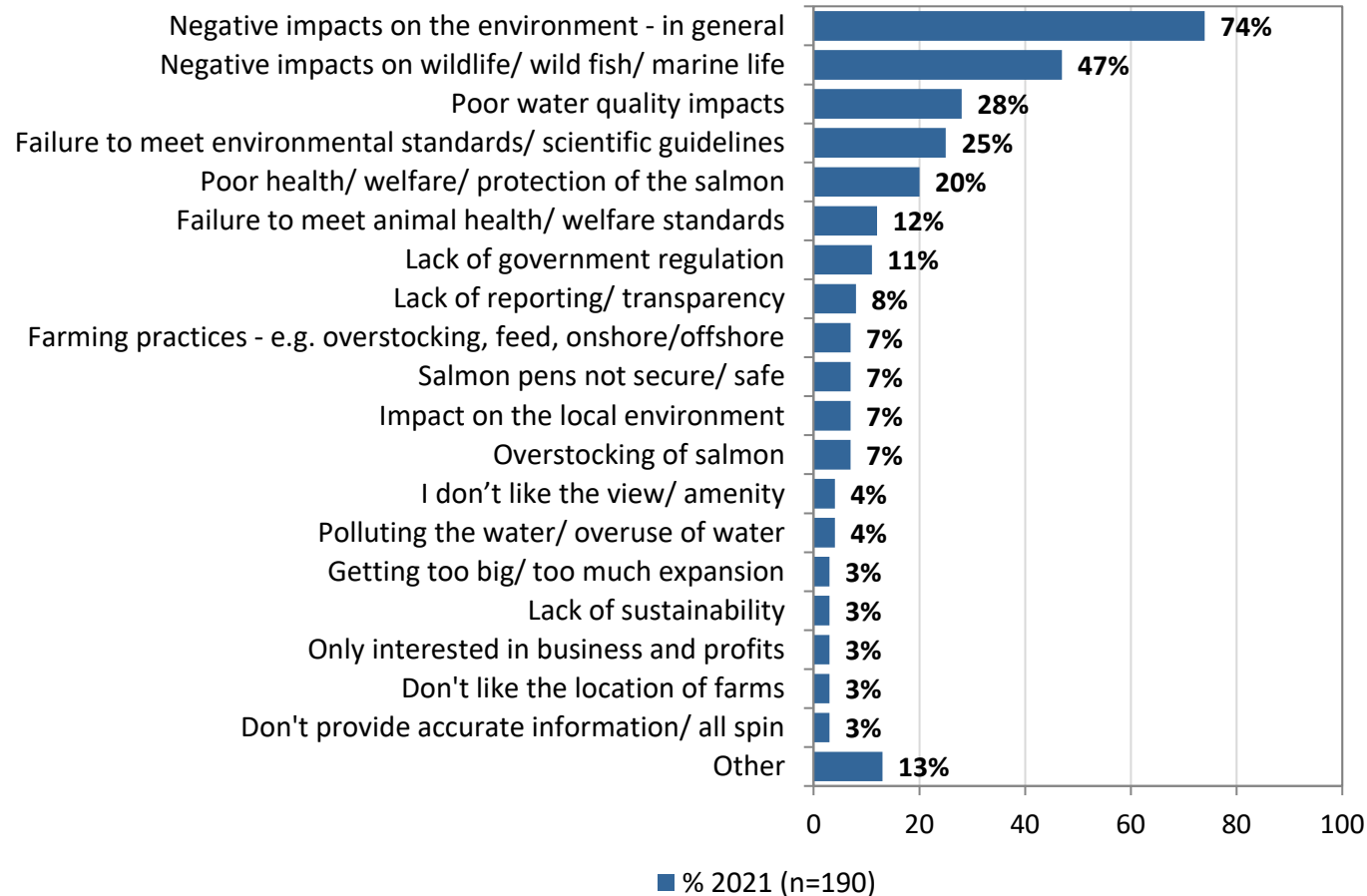
- Respondents aged 55 years and over were significantly more likely to cite **polluting the water/ overuse of water** as a reason for being neutral towards the Tasmanian salmon farming industry (18%).

*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

Q. What are your main reasons for being neutral towards the Tasmanian salmon farming industry?

Reasons for Opposing the Salmon Farming Industry

Chart 10 – Reasons for Opposing the Salmon Farming Industry
(Percentage of respondents “somewhat” or “definitely” in opposition to the salmon farming industry)*



Among the respondents who opposed the Tasmanian salmon farming industry, the reason or concern they mentioned most frequently by far was “negative impacts on the environment – in general” (74%).

A range of more specific environmental concerns also recorded high rates of mention: most notably, the “negative impacts on wildlife/ wild fish/ marine life” (47%).

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

“Other” reasons each mentioned by 2% or less included:

- “Don’t eat fish/ consume the product”, “general negative impression”, “need to clean up their act/ improve”, and “don’t know enough about it”.

*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

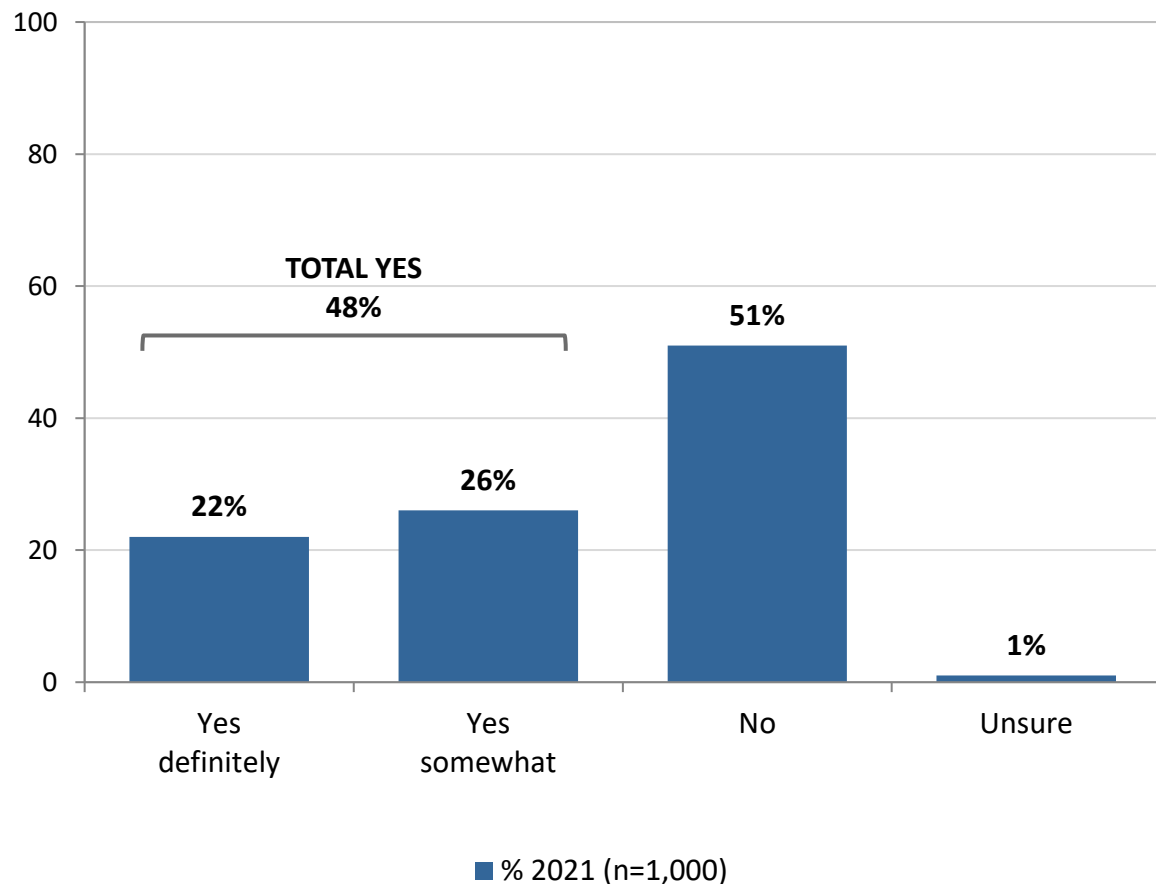
Q. What are your main reasons or concerns in opposing the Tasmanian salmon farming industry?

Section Six

Provision of Information on the Salmon Farming Industry in Tasmania

Call for More Information about the Salmon Farming Industry

Chart 11 – Call for More Information about the Salmon Farming Industry
(Percentage of all respondents)



The respondents in the full sample were relatively evenly divided between those who said “yes”, that they would want to know or understand more about the Tasmanian salmon farming industry (48% in total), and those who said “no” (51%).

The figure of 48% stating “yes”, and of these 22% saying “yes – definitely”, indicated that there is a substantial call for more information on the part of the Tasmanian community.

By demographic group:

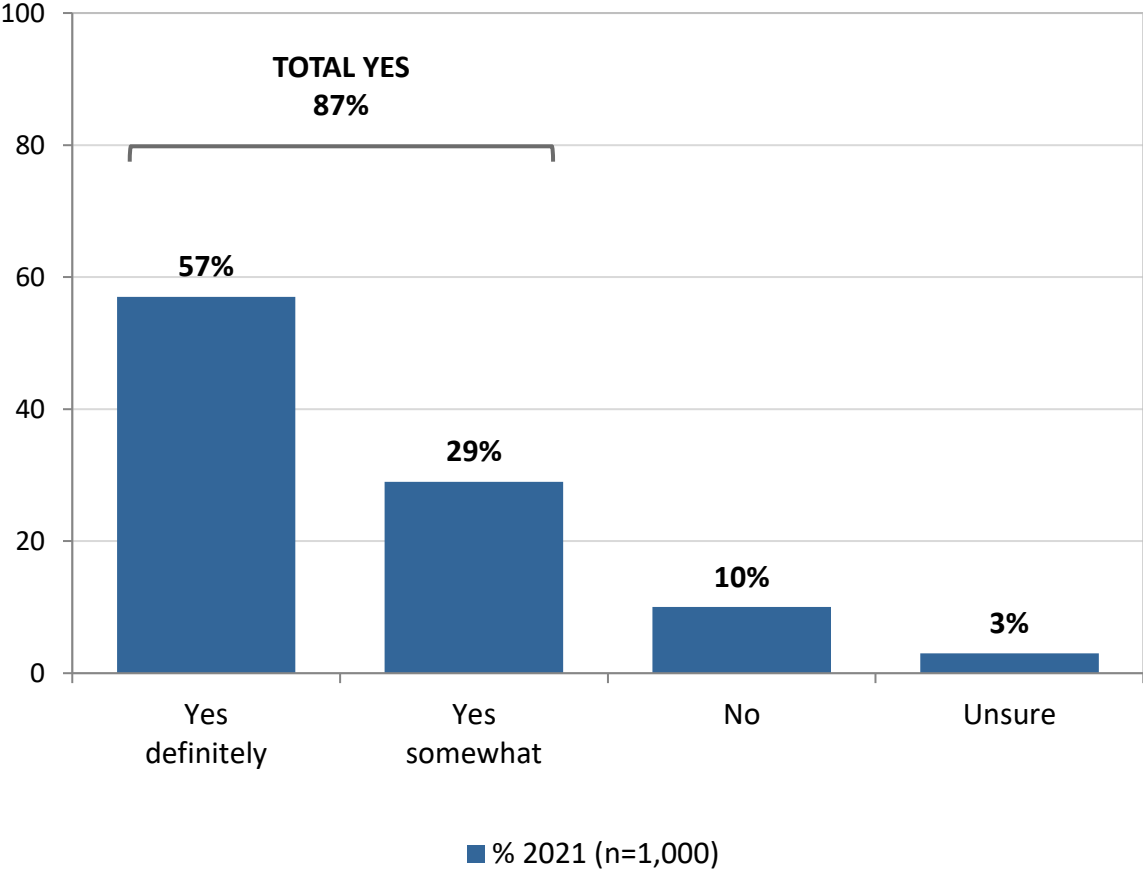
- Respondents aged 18 to 34 years were significantly more likely to state “yes”, they would like to know “somewhat” more about the Tasmanian salmon industry (37% in total).
- Respondents aged 55 years and over were significantly more likely to state “no” (57%).

Q. Would you personally want to know or understand more about the Tasmanian salmon farming industry?



Perception that the Public Needs More Information about the Salmon Farming Industry

Chart 12 – Perception that the Public Needs More Information about the Salmon Farming Industry
(Percentage of all respondents)*



*Percentages may not sum to 100 due to rounding.

A significantly higher proportion of the respondents in the full sample said “yes”, that they thought the public in general needed to know or understand more about the Tasmanian salmon farming industry (87% in total).

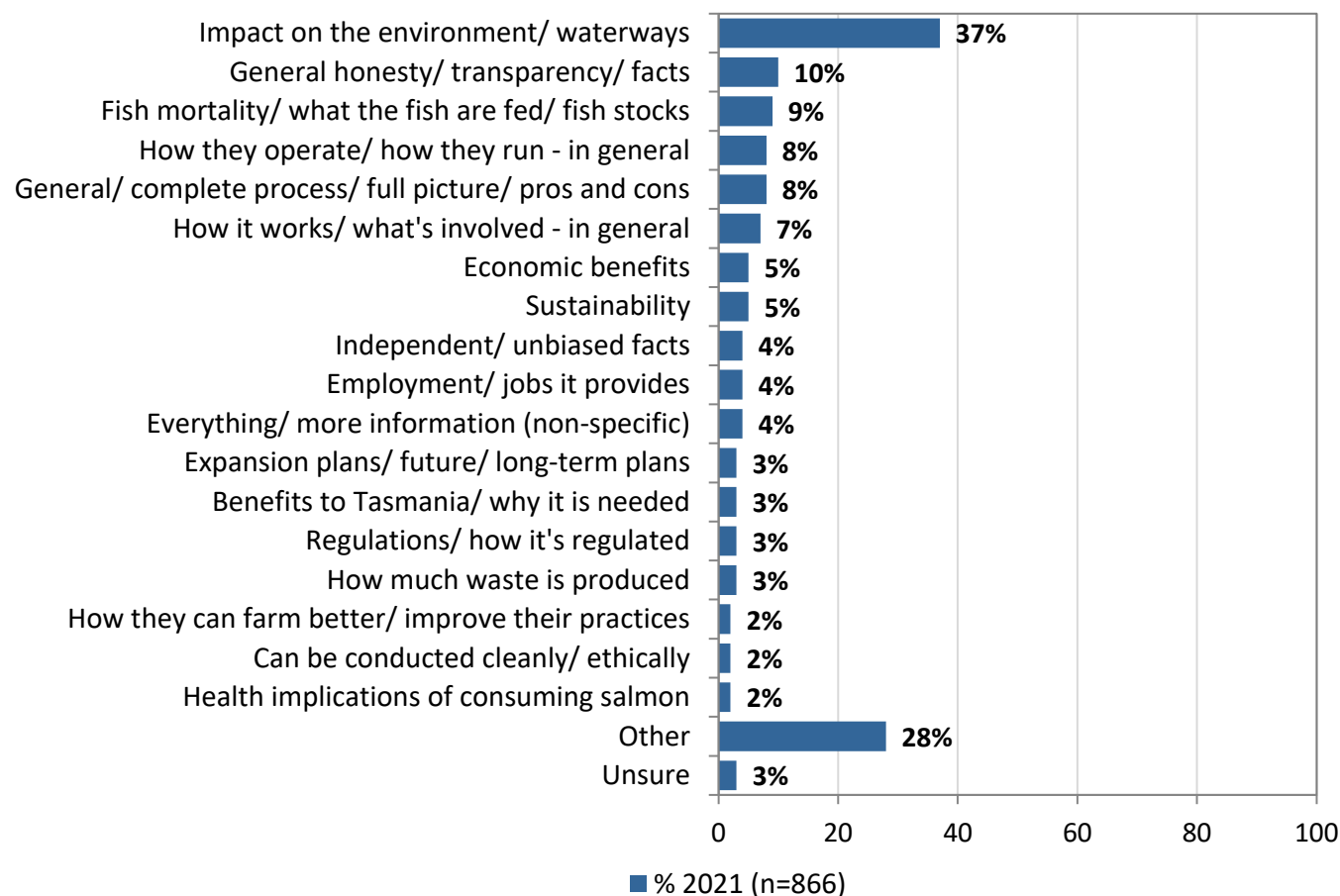
Moreover, of those stating yes, the clear majority said “yes – definitely” (57%).

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

Q. Do you think the public in general needs to know or understand more about the Tasmanian salmon farming industry?

What the Public Needs to Know or Understand about the Salmon Farming Industry

Chart 13 – What the Public Needs to Know or Understand about the Salmon Farming Industry
(Percentage of respondents stating “yes” the public needs to know or understand more about the salmon farming industry)*



Among the respondents who thought that the public needed to know or understand more about the salmon farming industry, by far the most frequently mentioned aspect was the “impact on the environment/ waterways” (37%).

A wide range of further aspects were each cited by much smaller samples of 10% or less.

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

“Other” areas each mentioned by less than 2% included:

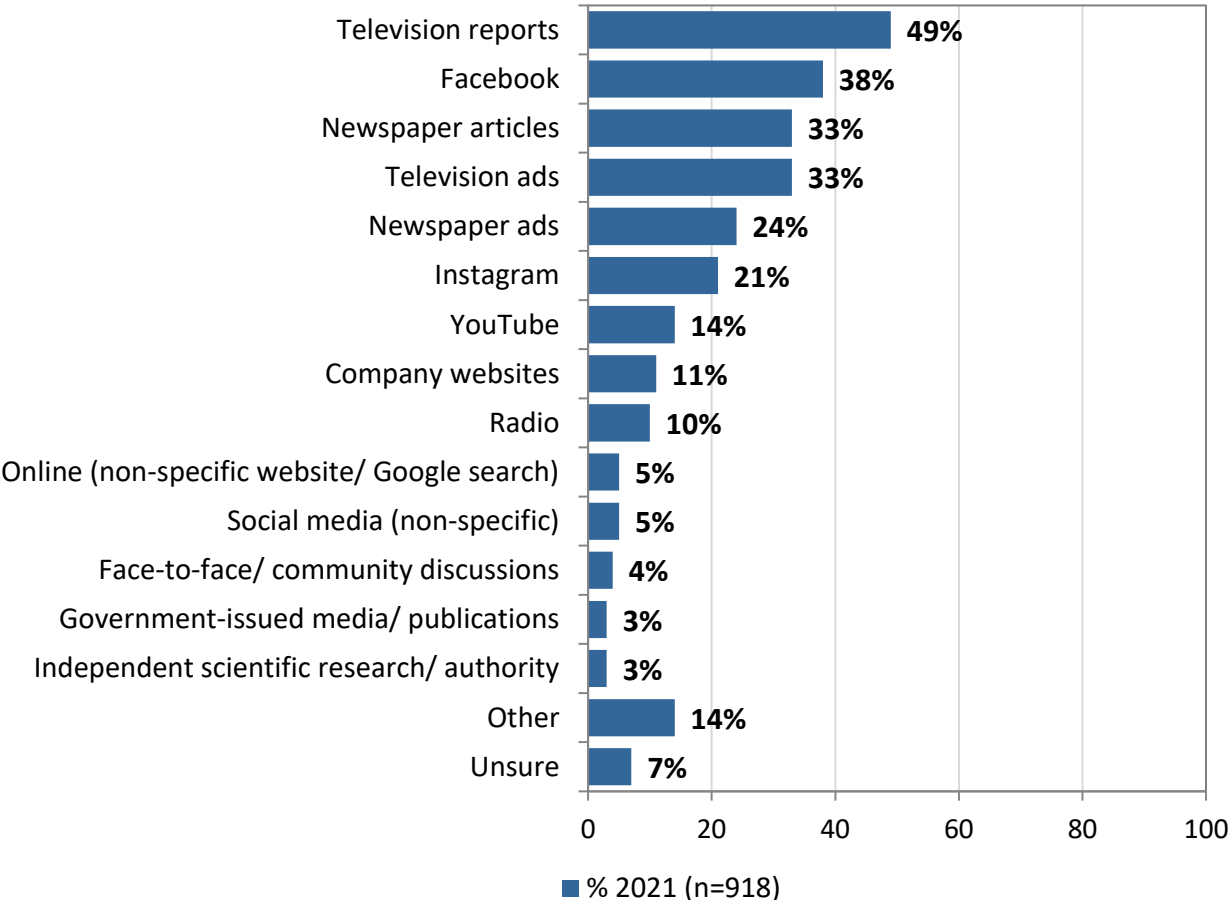
- “Farming techniques/ on-shore vs off-shore”, “relationship with Government/ assistance”, “support of local community”, “positives of the industry”, “a major industry in Tasmania”, and “updates/ how it’s going/ is it having an impact?”.

*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

Q. What does the public need to know or understand?

Best Channels for Providing Information about the Salmon Farming Industry

Chart 14 – Best Channels for Providing Information about the Salmon Farming Industry
(Percentage of respondents confirming they or the public need to know or understand more about the salmon farming industry)*



Traditional media recorded high rates of mention as the best channels for providing information on the Tasmanian salmon farming industry: most notably, “television reports” (49%), “newspaper articles” and “television ads” (33% in each case), followed by “newspaper ads” (24%).

To be noted also was the significantly large proportion who nominated “Facebook” (38%) and, to a somewhat lesser degree, “Instagram” (21%).

By demographic group:

- Respondents aged 18 to 34 years were significantly more likely to nominate **Facebook** as the best channel for providing information (54% in total), compared to those aged 55 years and over (22%).

Q. Which channels do you think would be best for providing information on the Tasmanian salmon industry?

*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

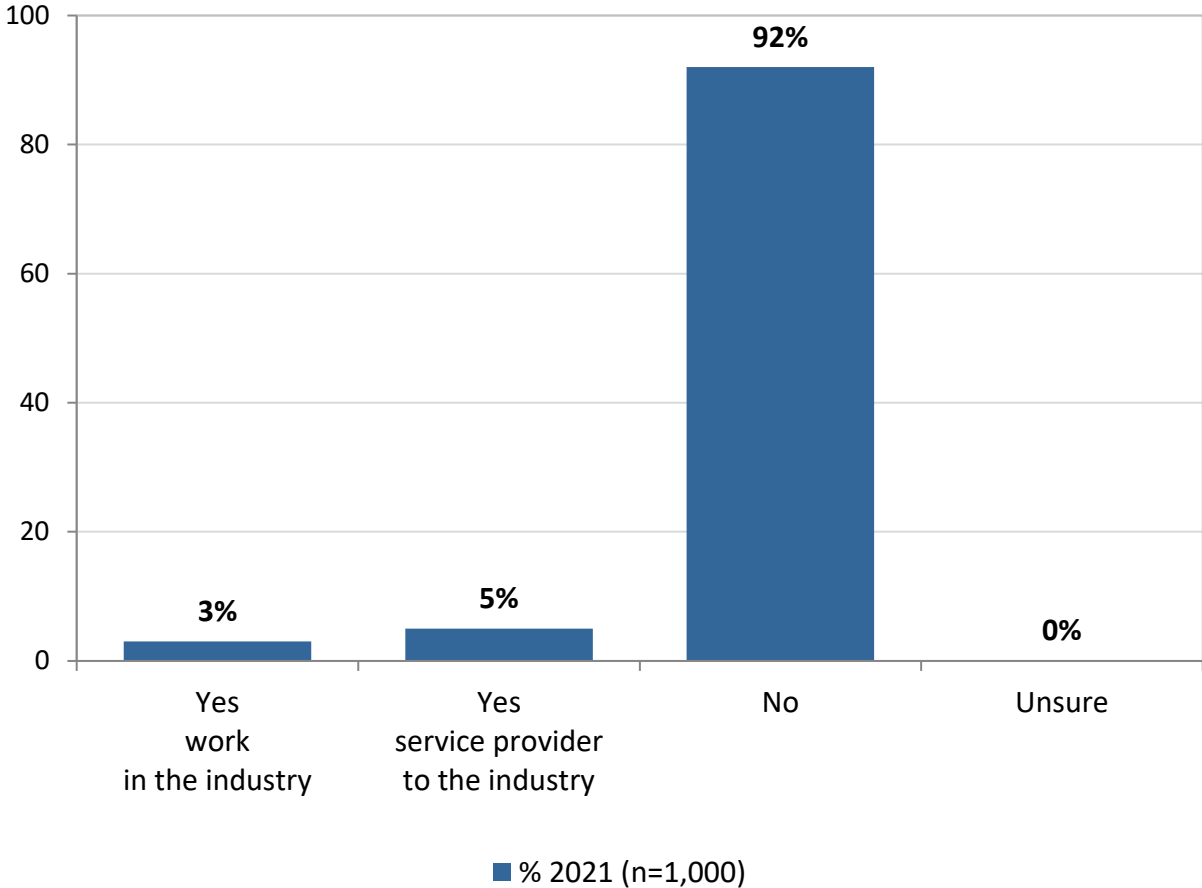
Section Seven

Direct Connections with the Salmon Farming Industry in Tasmania



Personal Experience Working in the Salmon Farming Industry or as a Service Provider

Chart 15 – Personal Experience Working in the Salmon Farming Industry or as a Service Provider
(Percentage of all respondents)*



The great majority of respondents reported that “no”, they had no direct experience of working in or being a service provider for the salmon farming industry (92%).

Similarly small samples confirmed that “yes” they worked in the industry (3%), or were service providers to the industry (5%).

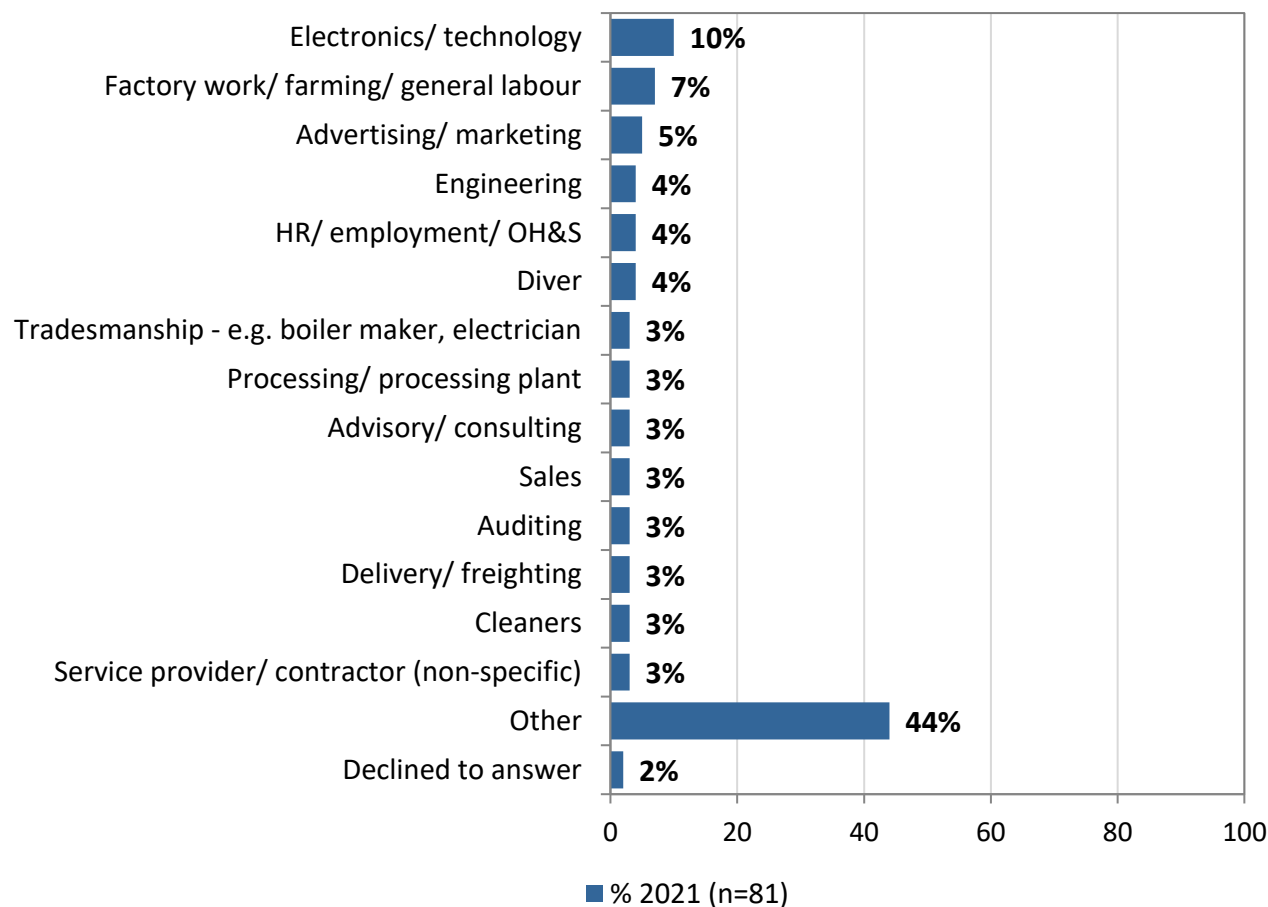
- By demographic group:
- Male respondents were significantly more likely to have **experience** with the salmon farming industry (12% in total, compared to 4% of females), particularly as a **service provider** to the industry (9%, compared to 2% of females).
 - Female respondents were significantly more likely to report having **no experience** with the industry (96%, compared to 87% of males).
 - Respondents aged 35 to 44 years were significantly more likely to have experience **working** in the industry (7%).

Q. Do you yourself have experience of working in the salmon farming industry or as a service provider to the industry?

*Percentages may not sum to 100 due to multiple responses being possible, except for “no” and “unsure” which were exclusive answers.

Nature of the Personal Work in the Salmon Farming Industry

Chart 16 – Nature of the Personal Work in the Salmon Farming Industry
(Percentage of respondents stating they have personal experience working in/with the salmon farming industry)*



The reported nature of the personal work in the Tasmanian salmon farming industry covered a wide range of roles and activities, each mentioned by small samples of 10% or less.

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

“Other” areas of work each mentioned by 2% or less included:

- “Repaired equipment”, “energy supplier”, “chef”, “breeding/ hatchery”, “management role”, “administration/ office work”, “supply/ produce equipment/ parts”, “regulating/ regulator”, “cleaning/ fileting fish” and “packing salmon”.

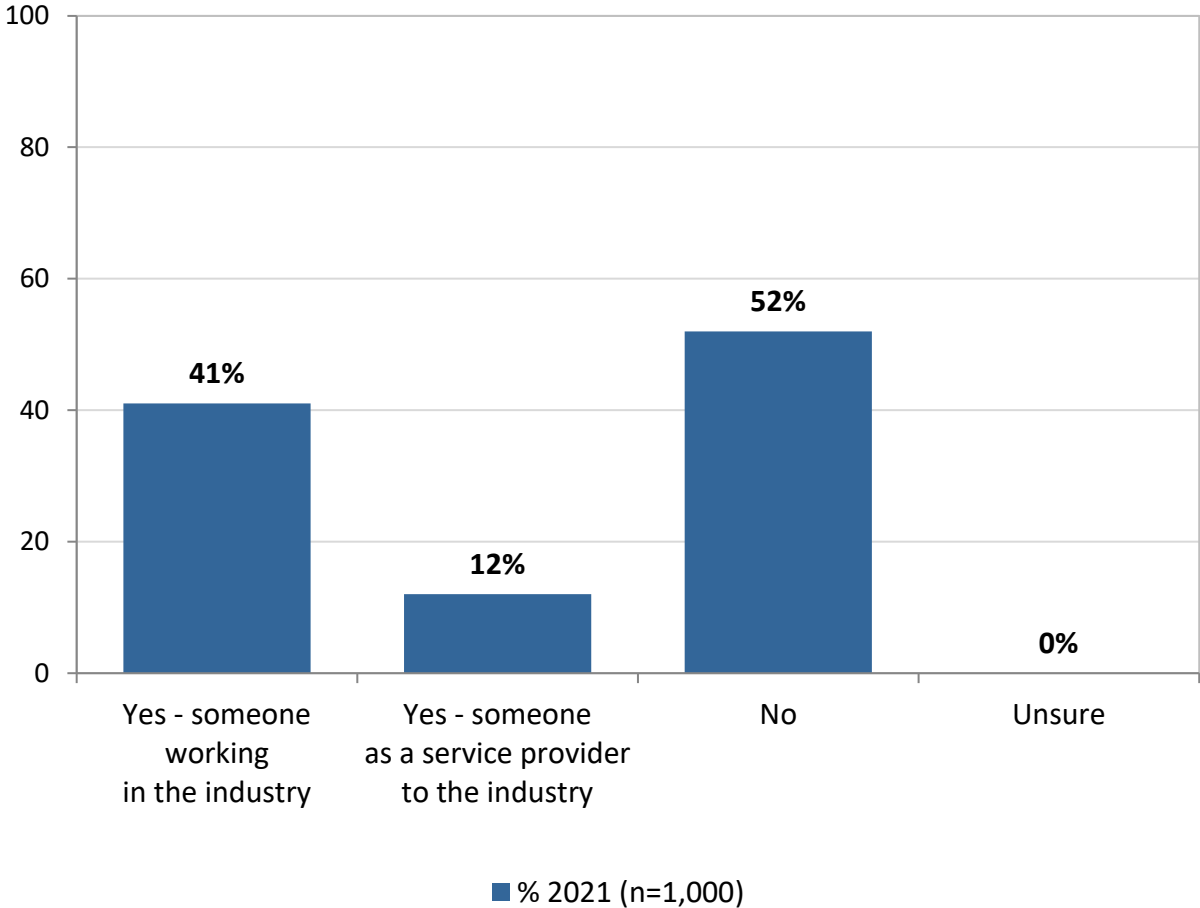
*Percentages do not sum to 100 due to multiple responses being possible, except “declined” which was an exclusive answer.

Q. What is or was the nature of this work?



Knowledge of Others Working in the Salmon Farming Industry or as a Service Provider

Chart 17 – Knowledge of Others Working in the Salmon Farming Industry or as a Service Provider
(Percentage of all respondents)*



A significantly greater proportion of the respondents said “yes”, they knew of someone else working in the salmon farming industry (41%), or who was a service provider to the industry (12%).

Just over one half of the sample said “no”, they did not (52%).

Q. Do you know someone else who has experience of working in the salmon farming industry or as a service provider to the industry?

*Percentages do not sum to 100 due to multiple responses being possible, except for “no” and “unsure which were exclusive answers.



Knowledge of Others Working in the Salmon Farming Industry or as a Service Provider – Population Subgroup Variations

On analysing the responses across the population subgroups, the following findings were noted.

Knowledge of Someone with Experience in the Industry “Working” and/or as a “Service Provider”

By demographic group, those significantly more likely to **know** someone with experience in the industry were:

- Male respondents (55% in total), compared to females (41%)
- Respondents aged 35 to 44 (60% in total)
- Respondents in the South of the state (54% in total), compared to those in the North (35%)

No Knowledge of Others with Experience in the Industry

By demographic group, those significantly more likely to **not know** anyone with experience in the industry were:

- Respondents aged 70 years and over (63%)
- Female respondents (59%), compared to male respondents (45%)
- Respondents in the North of the state (64%), compared to those in the South (45%)

Knowledge of Someone with Experience in the Industry “Working”

By demographic group, those significantly more likely to **know** someone with experience **working** in the industry were:

- Respondents aged 35 to 44 (55% in total)
- Respondents in the South of the state (47% in total), compared to those in the North (31%)

Knowledge of Someone with Experience in the Industry “Service Provider”

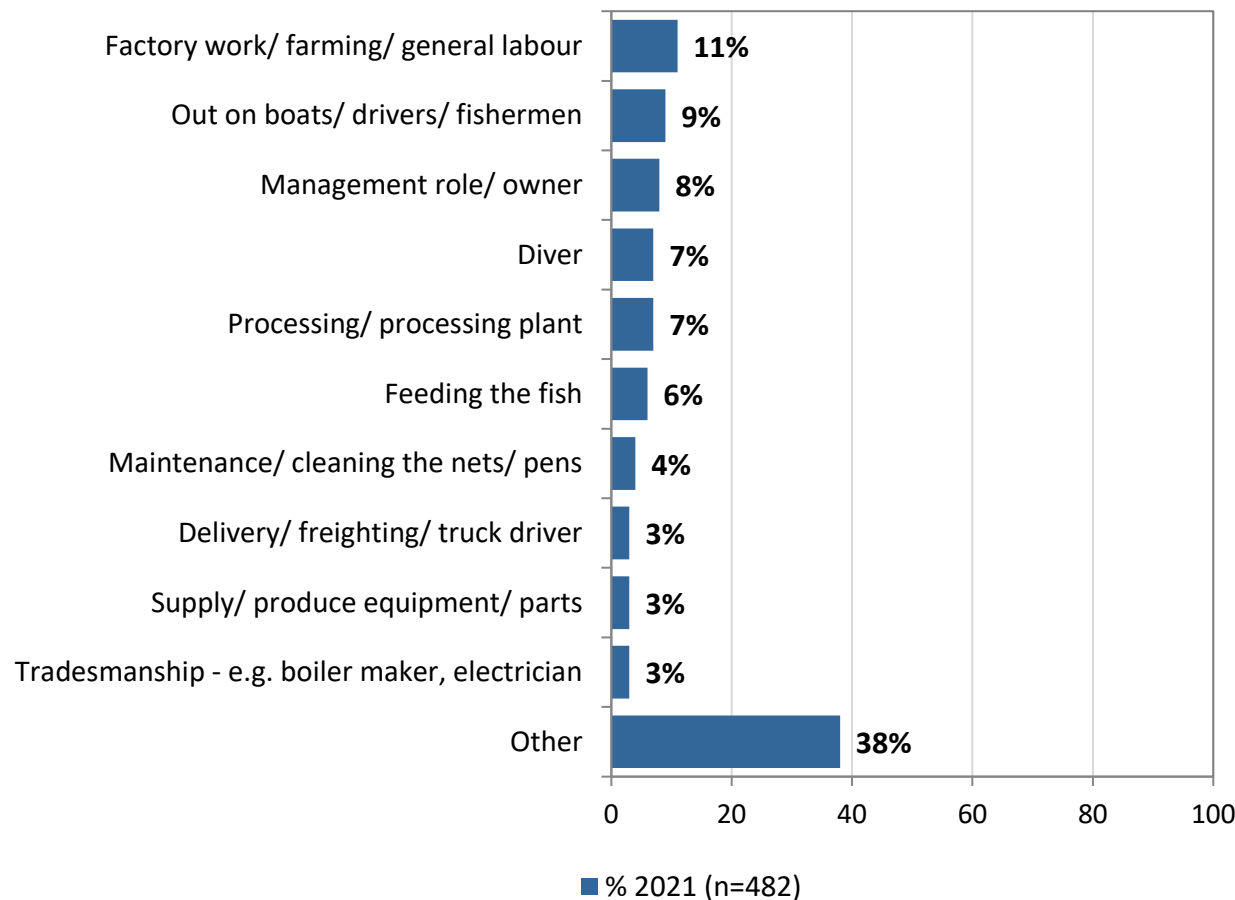
By demographic group, those significantly more likely to **know** someone with experience as a **service provider** to the industry were:

- Male respondents (15%), compared to females (8%)

Q. Do you know someone else who has experience of working in the salmon farming industry or as a service provider to the industry?

Nature of the Work of Others in the Salmon Farming Industry

Chart 18 – Nature of the Work of Others in the Salmon Farming Industry
(Percentage of respondents stating they know someone with experience working in/with the salmon farming industry)*



The reported nature of the work of known others in the Tasmanian salmon farming industry likewise covered a wide range of roles and activities, each mentioned by small samples of 11% or less.

There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

“Other” areas of work each mentioned by 2% or less included:

- “Cleaning/ fileting fish”, “breeding/ hatchery”, “electronics/ technology”, “administration/ office work”, “engineering”, “packing salmon”, “scientist/ science”, “sales”, “advertising/ marketing”, “HR/ employment/ OH&S”, “quality control/ assessment”, “feed production/ supplier”, “accountant”, “advisory/ consulting” and “aqua-culturalist”.

*Percentages do not sum to 100 due to multiple responses being possible, except “declined” which was an exclusive answer.

Q. What is or was the nature of this work?

Section Eight

Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania



Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania (1)

Table 4 – Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania*

Element	Percentage of respondents (2021, n=1,000)							
	TOTAL IMPORTANT (4-5)	Very important 5	4	Neutral 3	TOTAL NOT IMPORTANT (1-2)	2	Not important at all 1	Unsure
Maintain high animal health and welfare standards	94	81	13	2	2	1	2	1
Protect the natural environment and wildlife	93	81	12	3	3	1	2	1
Provide a high quality, healthy food product	93	81	12	3	3	1	2	1
Public transparency and reporting on its operations	88	69	20	8	3	1	2	1
Maintain sustainable fish stocks	87	70	17	5	5	2	3	3

Each of the above statements recorded very high total levels of perceived importance for the salmon farming industry to best contribute to Tasmania and engage with the Tasmanian community, with those giving the highest scores of “4” or “5” ranging from 87% up to 94% of the full sample of respondents.

Moreover, in each instance the respondents were significantly more likely to give the top score of “5”, indicating their view that these elements were “very important”, in a range from 70% up to 81%.

Q. I am going to read you some ways suggested by others for the salmon farming industry to best contribute to Tasmania and engage with the Tasmanian community. Please rate how important you think each is, on a scale of 1 to 5, where 1 is “not important at all” and 5 is “very important”.

*Percentages may not sum to 100 due to rounding.



Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania (2)

Table 4 (cont'd) – Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania*

Element	Percentage of respondents (2021, n=1,000)							
	TOTAL IMPORTANT (5-4)	Very important 5	4	Neutral 3	TOTAL NOT IMPORTANT (1-2)	2	Not important at all 1	Unsure
Generate income for the local economy	84	62	22	10	5	3	2	1
Generate and provide training, jobs and employment	84	61	22	11	5	3	2	1
Support Tasmania's regions and regional communities	79	52	27	12	7	3	4	1
Support of local community events and groups	60	31	29	25	13	7	6	2
Community sponsorships and partnerships	56	27	28	26	15	9	6	3

The total importance levels were lower with respect to the above elements: with the pink-highlighted cells indicating where they were significantly lower, or a considerably higher proportion gave the lowest importance scores of “1” or “2”.

The blue-highlighted cells indicate where significantly higher percentage figures were recorded.

Nonetheless, it should be noted that in all instances, the total proportion of respondents giving the highest importance scores of “4” or “5” were still in the clear majority.

Q. I am going to read you some ways suggested by others for the salmon farming industry to best contribute to Tasmania and engage with the Tasmanian community. Please rate how important you think each is, on a scale of 1 to 5, where 1 is “not important at all” and 5 is “very important”.

*Percentages may not sum to 100 due to rounding.



Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania – Population Subgroup Variations

On analysing the responses across the population subgroups, the following findings were noted.

“Maintain high animal health and welfare standards”

Significantly more likely to rate this element as **not important** at some level were:

- Respondents aged 55 years or over (5% in total), compared to 0% of those aged under 55 years

“Protect the natural environment and wildlife”

Significantly more likely to rate this element as **important** at some level were:

- Female respondents (96% in total, 88% of whom stated “very” important), compared to 91% of males (75% of whom stated “very” important”)

“Public transparency and reporting on its operations”

Significantly more likely to rate this element as **important** at some level were:

- Female respondents (93% in total, 74% of whom stated “very” important), compared to 83% of males (62% of whom stated “very” important”)