Tasmanian Salmonid Growers Association
Community Sentiment Tracking Research
Track 2 - November 2021
Research Report

enterprise marketing & research services

November 2021

emrs

enterprise marketing & research services

This report has been prepared by
Enterprise Marketing and Research Services
60 Main Road, Moonah TAS 7009

All enquiries should be addressed to:

Katrin Roy
Senior Research Analyst
EMRS
PO Box 402
Moonah TAS 7009

Phone: (03) 6211 1222
Fax: (03) 6211 1219
E-mail: katrin.roy@emrs.com.au

Contents

Contents

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.

The baseline results of Track 1 of the Community Sentiment research were reported on by EMRS in July 2021. In November 2021, EMRS conducted Track 2 of the research.

In order to collect the required data to meet all the objectives specified in the brief, and ensure continuity with the previous baseline research, EMRS again adopted a quantitative survey methodology utilising Computer Assisted Telephone Interviewing (CATI) for Track 2. The data was collected via the same 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 Track 2 fieldwork took place from the 15th to the 25th of November 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 Track 2 research round and provides comparisons with the results of the previous baseline 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 in November 2021 gave the highest scores of "4" or "5" when rating the importance of the aquaculture industry to Tasmania.

- **75% TOTAL IMPORTANT (72%)**
  - 44% highest score of "5" (45%)
  - 31% next highest score of "4" (28%)
- 16% neutral score of "3" (18%)
- **8% TOTAL NOT IMPORTANT (9%)**
  - 3% lowest score of "1" (4%)
  - 6% next lowest score of "2" (4%)

(July 2021 results – the variations across the two rounds were marginal.)

NET IMPORTANCE SCORE(†)

July 2021	November 2021
+64	+67

A Net Importance Score of +67 is classified as "excellent".

The very high level of importance attributed to the industry that was established in the baseline research was affirmed in the latest round.

†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".
- **A Net Importance Score of +67 lies in the +50 to +70 range which is classified as "excellent".**

Reasons for Regarding the Aquaculture Industry as Important to Tasmania

(Respondents giving high importance scores of "4" or "5", n=752)

Unprompted, the reason given most frequently in November 2021 for attributing a high level of importance to the industry was again:

- *Generates and provides jobs/ employment* (62%)

  followed by
- *Generates income for Tasmania as a whole/ the state's economy* (31%)
- *Provides a good food source* (25%)
- *Contributes to Tasmania's export sector* (19%)
- *Sustainability/ managing fish resources/ maintaining stock* (16%)
- *Supplies a high quality/ healthy food product* (16%)
- *Generates income for local areas/ local economies* (15%)

Generally, the variations across the two research rounds were marginal. One notable shift was in the rate of mention of "sustainability/ managing fish resources/ maintaining stock" (16% currently, up from 8% in July 2021).

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 in November 2021 for attributing a low level of importance to the industry was again:

- *Impact on the local environment* (47%)

  followed by
- *Polluting the water/ overuse of water* (13%)
- *Fish farming practices – e.g. overstocking, feed, onshore/offshore* (12%)

The variations across the two research rounds were marginal, with environmental and animal welfare factors again emerging as primary reasons for regarding the industry as not important.

Executive Summary

Awareness of the Tasmanian Salmon Farming Industry

(All respondents, n=1,000)

The clear majority of respondents in November 2021 reported that they were aware of the Tasmanian salmon farming industry to some degree.

- **94% TOTAL AWARE (92%)**
  - 47% "definitely aware" (47%)
  - 47% "somewhat aware" (45%)
- **6% TOTAL UNAWARE (8%)**

(July 2021 results – the variations across the two rounds were marginal.)

In the latest round, as previously, total awareness stood at a very high level, with a significantly large proportion specifying that they were "definitely aware".

Among the relatively small proportion in November 2021 citing websites in general as a channel of awareness (n=58)**, most frequently specified were:**

- *ABC* (26%)
- *Tassal website* (17%)
- *Huon Aquaculture website* (15%)
- *Facebook/ other social media* (14%)

The *"Petuna Seafood website"* was mentioned by 3%.

Channels of Awareness of the Salmon Farming Industry

(Respondents aware of the industry, n=948)

The channel of awareness mentioned most frequently in November 2021 was:

- *Television reports* (46%)

followed by

- *Newspaper articles* (33%)
- *Television ads* (29%)
- *Word of mouth* (24%)
- *Newspaper ads* (21%)
- *Know people in the industry* (19%)
- *Facebook* (16%)

The latest results showed little variation from those recorded in the previous research round, with media reports and articles again recording similarly high rates of mention.

Also, again to be noted, here and elsewhere in the survey, was the relatively high rate of mention of "Facebook" – the younger the respondent, the more likely they were to cite this channel.

Whilst variations across the two research rounds were generally marginal, it was to be noted that in November 2021:

- The "ABC" was cited somewhat more frequently (by 26% currently, compared to 12% in July 2021).
- "The Mercury", "The Age" and "Tasmanian Times online" were not cited at all in the latest round, indicating, perhaps, their lower level of recent reporting on the salmon farming industry.

Executive Summary

Support for or Opposition to the Tasmanian Salmon Farming Industry

(All respondents, n=1,000)

The majority of all respondents in November 2021 stated that they supported the Tasmanian salmon farming industry to some degree.

- **54% TOTAL SUPPORT (54%)**
  - 29% "strongly support" (31%)
  - 25% "somewhat support" (23%)
- 24% neutral (24%)
- **17% TOTAL OPPOSE (18%)**
  - 9% "strongly oppose" (11%)
  - 8% "somewhat oppose" (7%)

(July 2021 results – the variations across the two rounds were marginal.)

NET SUPPORT SCORE(†)

July 2021	November 2021
+36	+37

A Net Support Score of +37 is classified as "good".

The current Net Support Score showed virtually no change from the positive score that was established in the previous baseline research round.

†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.
- **A Net Support Score of +37 lies in the 0 to +49 range which is classified as "good".**
- **This score will continue to be tracked in the subsequent research rounds.**

Reasons for Supporting the Salmon Farming Industry

(Respondents in support of the industry, n=568)

Unprompted, the reason provided most frequently in November 2021 for supporting the industry was again:

- *Generates and provides jobs/ employment* (67%)

  followed by
- *Generates income for Tasmania as a whole/ the state's economy* (33%)
- *Provides a good food source* (27%)
- *Supplies a high quality/ healthy food product* (22%)
- *Generates income for local areas/ local economies* (19%)
- *Contributes to Tasmania's export sector* (15%)
- *Sustainability/ managing fish resources/ maintaining stock* (14%)

The latest results showed minimal variation from those recorded previously in the July 2021 round. Two themes again emerged most strongly for supporting the industry: namely, its contribution to jobs and the economy; and its provision of a good, high quality and healthy food source.

Reasons for the Neutral Position on the Salmon Farming Industry

(Respondents neutral in their position on the industry, n=214)

Unprompted, the reasons provided most frequently in November 2021 for holding a neutral position on the industry were again:

- *Don't know enough about it* (32%)
- *Impact on the local environment* (23%)

The latest results showed minimal variation from those recorded previously in the July 2021 round. Apart from a lack of knowledge, the reasons given for a neutral position on the industry were wide-ranging, primarily raising various environmental concerns, but also some positive aspects.

Executive Summary

Reasons for Opposing the Salmon Farming Industry

(Respondents in opposition to the industry, n=158)

Unprompted, the reason given most frequently in November 2021 for opposing the industry was again:

- *Negative impacts on the environment – in general* (66%)*

  followed more specifically by
- *Negative impacts on wildlife/ wild fish/ marine life* (39%)*
- *Poor water quality impacts* (25%)
- *Failure to meet environmental standards/ scientific guidelines* (22%)
- *Poor health/ welfare/ protection of the salmon* (15%)
- *Failure to meet animal health/ welfare standards* (12%)

*On comparing the above results with those in July 2021, a marginal decrease, in each case of 8 percentage points, was evident in the rate of mention of the top two reasons. Further tracking will indicate whether this is an ongoing downward trend.

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

(All respondents, n=1,000)

A far higher proportion of respondents in November 2021 went on to state that they felt the public in general needed to know or understand more about the industry.

- **88% TOTAL YES (87%)**
  - 54% "yes – definitely" (57%)
  - 35% "yes – somewhat" (29%)
- **8% TOTAL NO (10%)**

The strength of this perception was further evidenced in over one half of the full sample again stating "yes – definitely".

(July 2021 results – the variations across the two rounds were marginal.)

Call for More information on the Salmon Farming Industry

(All respondents, n=1,000)

In November 2021, the respondents were somewhat more likely to say "yes", that they personally wanted to know or understand more about the industry than those who did not.

- **52% TOTAL YES (48%)**
  - 20% "yes – definitely" (22%)
  - 32% "yes – somewhat" (26%)
- **47% TOTAL NO (51%)**

(July 2021 results – the variations across the two rounds were marginal.)

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

(Respondents stating the public needs to know more, n=876)

Unprompted, the aspect of more public information on the industry mentioned most frequently again in November 2021 was:

- *Impact on the environment/ waterways* (36%)

  followed, at a much lower rate of mention, by
- *General honesty/ transparency/ facts* (10%)
- *The general/ complete process/ full picture/ pros and cons* (9%)
- *How they operate/ how they run – in general* (9%)

The further responses were wide-ranging, each mentioned by small samples of 7% or less. They provide additional insights on what could be communicated more clearly to the public (see Chart 13, p.23). There were minimal variations in the responses across the two research rounds.

TSGA

Executive Summary

Best Channels for Providing Information about the Salmon Farming Industry

(Respondents stating they or the public needs to know more, n=489)

The channel most frequently nominated in November 2021 for best communicating information about the industry was again:

- *Television reports* (50%)

  followed by:
- *Facebook* (41%)
- *Television ads* (36%)
- *Newspaper articles* (35%)
- *Instagram* (23%)
- *Newspaper ads* (22%)

On comparing the latest results with those recorded in July 2021, the rates of mention of the communication channels showed minimal variation.

In the previous round as in the latest round, 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 particular, "Facebook" and "Instagram". With respect to the latter, it was to be noted especially among the younger demographic of those aged 18 to 44 years.

Direct Connections with the Salmon Farming Industry in Tasmania November 2021

- **The clear majority of all respondents** (n=1,000) **currently reported that "no", they did not themselves have experience of working in the salmon farming industry or as a service provider to the industry (91%).**

  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=74)**, the nature of the work covered a wide range of roles and activities, each mentioned by 16% or less.**

  Chart 16, p.27 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 (45%), or who was a service provider to the industry (12%).**

  One half of the sample said "no", they did not (50%).

- **Among the sample knowing someone working in the industry or being a service provider** (n=473)**, the nature of the work, likewise, covered a wide range of roles and activities, each mentioned by 16% or less.**

  Chart 18, p.29 presents the responses given.

Executive Summary

Importance Ranking of Specified Elements of the Salmon Farming Industry in Tasmania – November 2021

(All respondents, n=1,000)

As in the July 2021 round, all respondents in November 2021 were read ten specific elements of the salmon farming industry to best contribute to Tasmania and engage with the Tasmanian community. They were asked to provide a rating of each 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	93%, 4%, 1%, 1%
Protect the natural environment and wildlife	92%, 5%, 2%, 1%
Provide a high-quality, healthy food product	92%, 4%, 3%, 0%
Public transparency and reporting on its operations	88%, 8%, 3%, 1%
Maintain sustainable fish stocks	87%, 7%, 3%, 2%
Generate income for the local economy	84%, 11%, 4%, 1%
Generate and provide training, jobs and employment	84%, 11%, 4%, 0%
Support Tasmania's regions and regional communities	80%, 14%, 5%, 1%
Support of local community events and groups	58%, 26%, 14%, 2%
Community sponsorships and partnerships	51%, 31%, 15%, 3%

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

- **Maintain high animal health and welfare standards** (97% in total, compared to 90% of males); and
- **Protect the natural environment and wildlife** (95% in total, compared to 88% of males).

To be noted in the November 2021 round:

- In all instances, the total proportion of respondents giving the highest importance scores of "4" or "5" were in the majority, ranging from 51% up to 93%.
- 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.
  - All elements in terms of TOTAL importance were also more likely to be rated with the highest score of "very important", significantly so with respect to the top 5 elements.
  - 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.
- **The responses in November were closely in line with those recorded previously in July 2021.**
- **The findings, confirmed in both rounds, provide an indication of where reassurance is sought by the Tasmanian population and where potential lies for further consolidating a positive view and community support of the industry.**

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, beginning with a survey to gather comprehensive baseline data from the community.

Utilising the same survey, 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.

The results of Track 1 of the Community Sentiment research were reported on by EMRS in July 2021. In November 2021, EMRS conducted Track 2 of the research.

Scope of the Research

As in the previous round, the broad scope of the Track 2 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.

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 November 2021 Track 2 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;
- Measure the perceived importance of the salmon farming industry's future contribution and engagement with the Tasmanian community; and
- Determine any shifts in the above by comparing the results of the Track 2 research with those of the Track 1 baseline research.

The Research Methodology

The Research Methodology

In order to collect the required data to meet all the objectives specified in the brief and ensure continuity with the previous baseline research, EMRS again adopted a quantitative survey methodology utilising Computer Assisted Telephone Interviewing (CATI). The data was collected via the same 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 Track 2 fieldwork took place between the 15th and the 25th of November 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 Track 2 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 have been noted where a statistically significant variation in the results is evident.

The People Interviewed

The People Interviewed

Between the 15th and the 25th of November 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	470	47
Female	530	53

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

Region	Number	Percentage
Total	1,000	100
South	504	50
North	265	27
North West	231	23

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

Age	Number	Percentage
Total	1,000	100
18 to 24 years	32	3
25 to 34 years	62	6
35 to 44 years	104	10
45 to 54 years	181	18
55 to 69 years	346	35
70 years and over	275	28

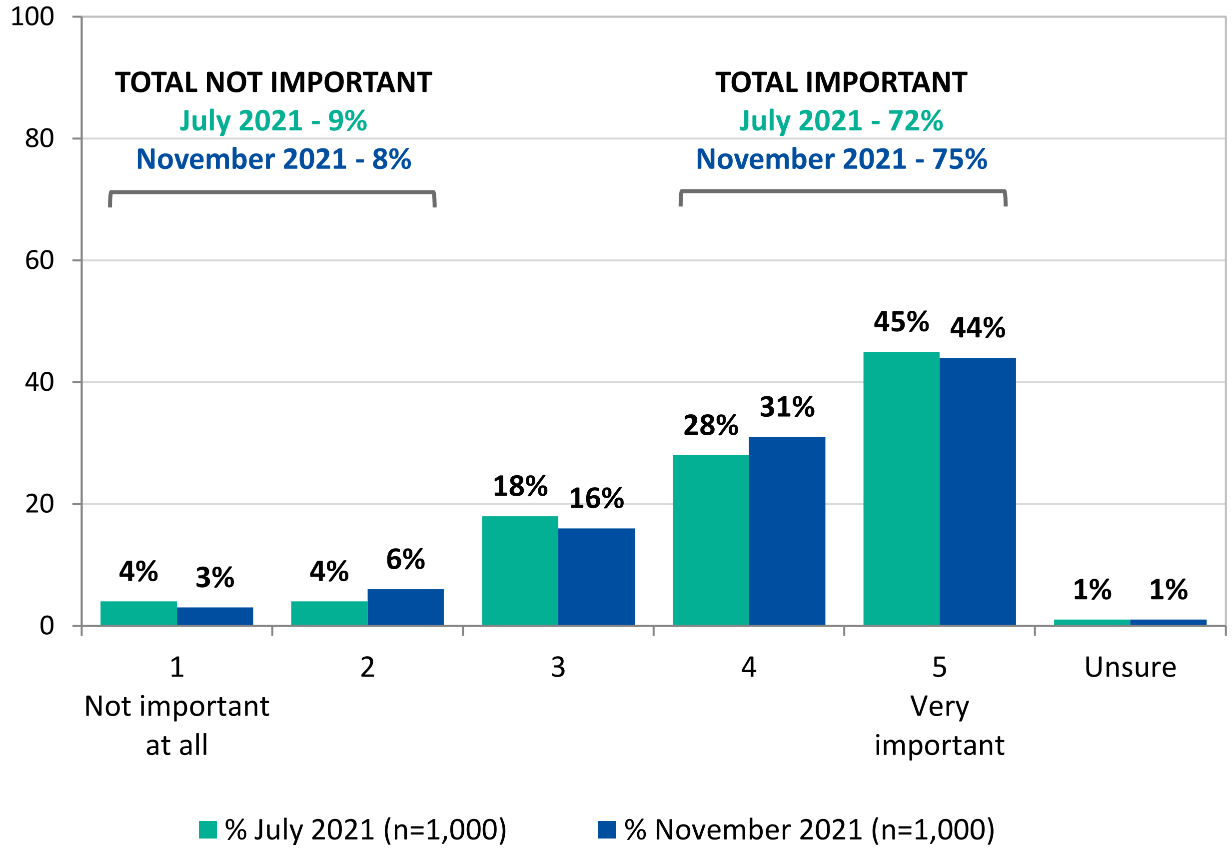
†Numbers and percentages in these tables are unweighted. Elsewhere in the report, the percentage figures have been weighted to accurately reflect the demographic profile of the target population.

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)*



*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".

In November 2021, a combined total of 75% of all respondents rated the aquaculture industry as important to Tasmania with the top scores of "4" or "5" out of 5.

Just 8% in total rated it as not important with scores of "1" or "2".

It was very positive to note that the respondents in the latest round were again most likely to rate the importance of the aquaculture industry with a top score of "5" (44%).

NET IMPORTANCE SCORE(†)

July 2021	November 2021
+64	+67

A Net Importance Score of +67 is classified as "excellent".

The very high level of importance attributed to the Tasmanian aquaculture industry that was established in July 2021 (+64) was affirmed in the latest round (+67).

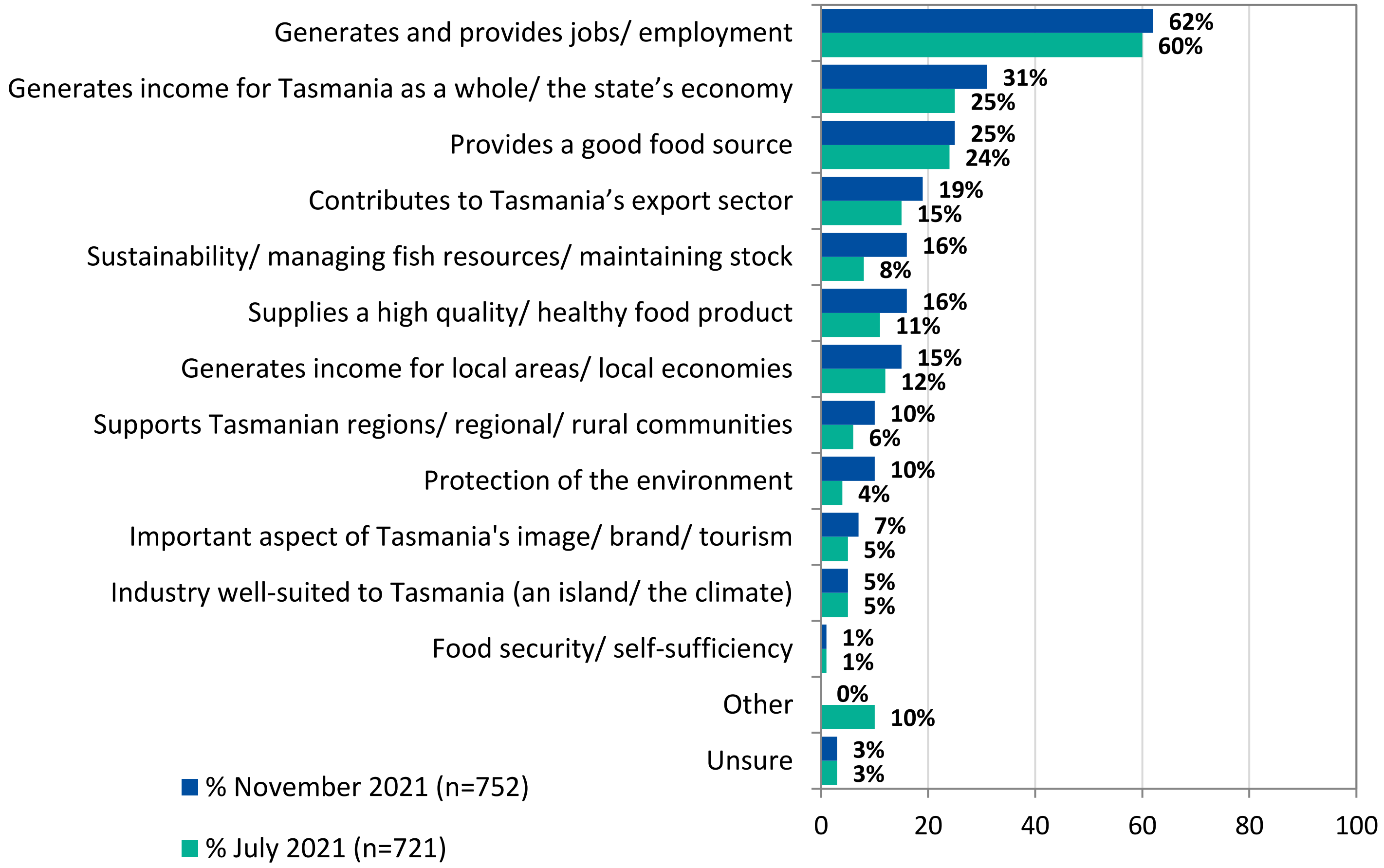
There were no statistically significant findings to be noted on comparing the responses across the population subgroups.

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".

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, currently as in July 2021, was that “it generates and provides jobs/ employment” (62%).

A further economic benefit was also again cited next most frequently: namely, that it “generates income for Tasmania as a whole/ the state’s economy” (31%).

The results in the latest round were generally in line with those recorded previously. The most notable variation was the increase in the proportion of respondents citing “sustainability/ managing fish resources/ maintaining stock” (16% currently, up from 8% in July 2021).

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

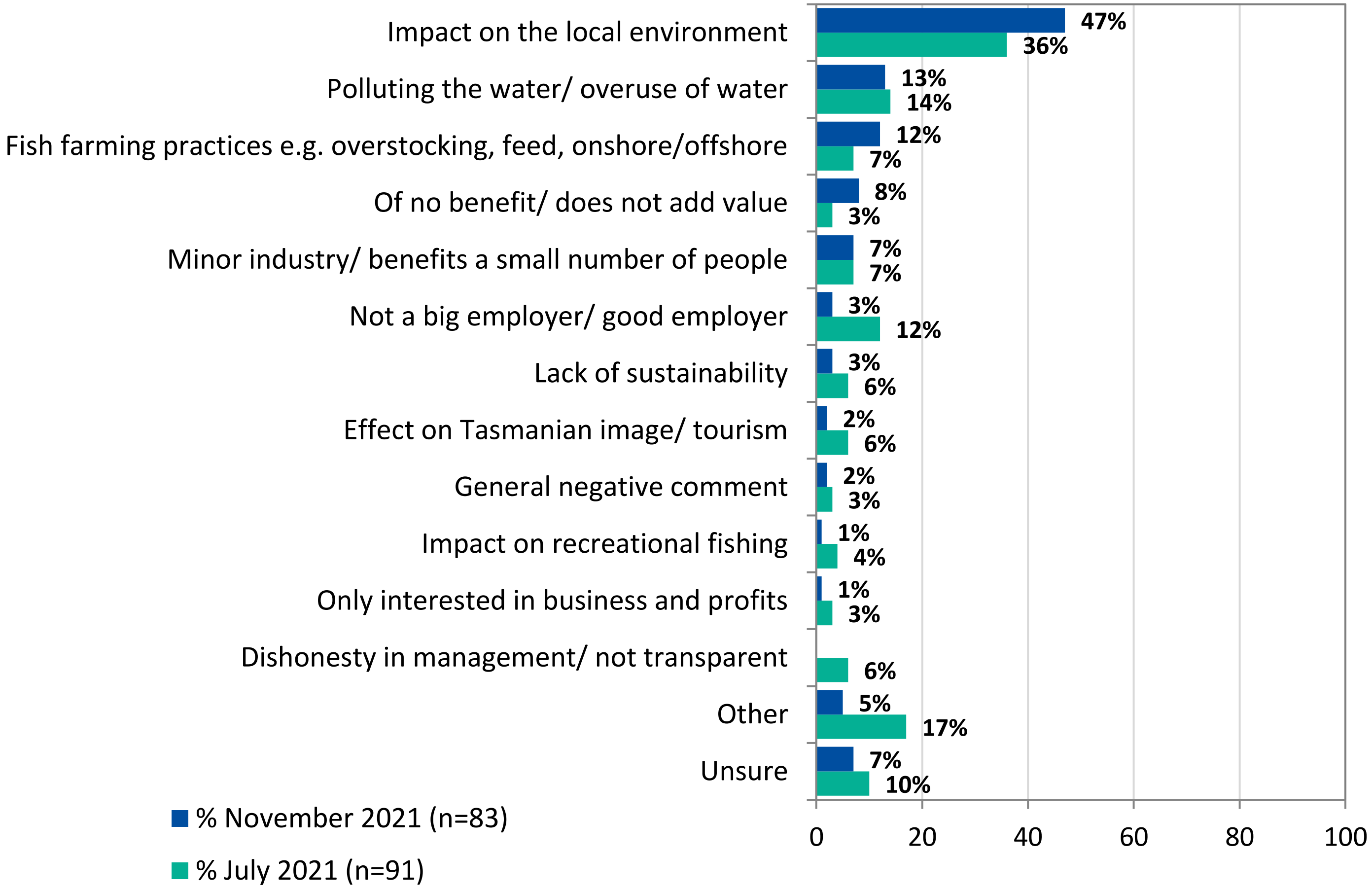
*Percentages do not sum to 100 due to multiple responses being possible, except “unsure” which was an exclusive answer.

Q. Why is the aquaculture industry 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 <u>not important</u> 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, currently as in July 2021, was its "impact on the local environment" (47%).

A more specific environmental aspect was again cited next most frequently in the latest round: namely, it "polluting the water/ the overuse of water" (13%).

"Fish farming practices – e.g. overstocking, feed, onshore/ offshore" recorded a similar rate of mention (12%).

All the charted responses should be regarded as indicative only, as they were each given by relatively small samples.

There were no significant variations across the two research rounds, with any shifts remaining well within the margin of error.

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

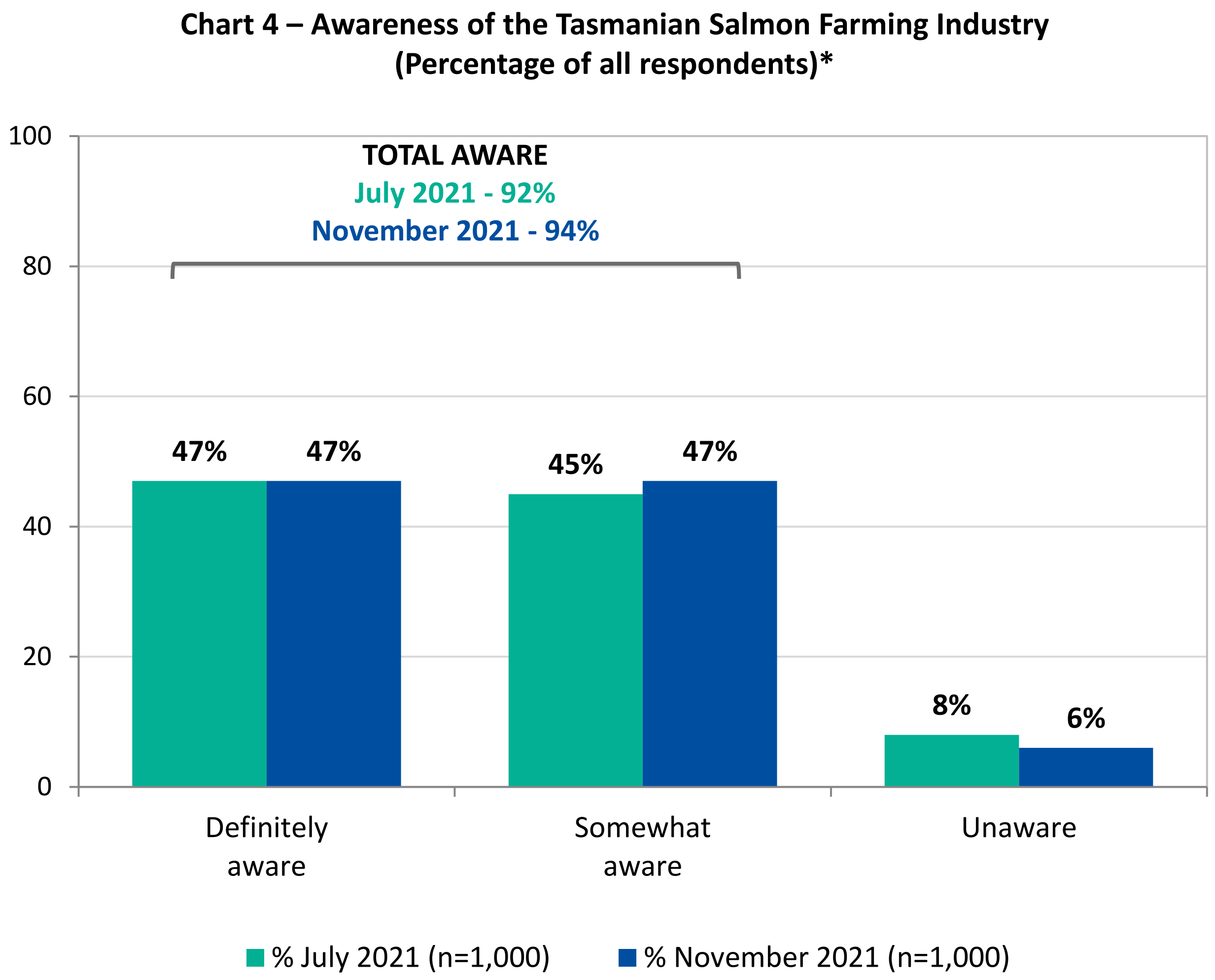
*Percentages do not sum to 100 due to multiple responses being possible, except "unsure" which was an exclusive answer.

Q. Why is the aquaculture industry <u>not</u> important to Tasmania?

Section Four

Awareness of the Tasmanian Salmon Farming Industry

Awareness of the Tasmanian Salmon Farming Industry



*Percentages may not sum to 100 due to rounding.

The great majority of all respondents in November 2021 confirmed that they were aware of the Tasmanian salmon farming industry to some degree (94% in total).

These results were equally divided between the respondents who said they were "definitely aware" (47%) and those who said they were "somewhat aware" (47%).

A small proportion stated they were "unaware" (6%).

The latest November results closely mirrored those recorded previously in the July 2021 round.

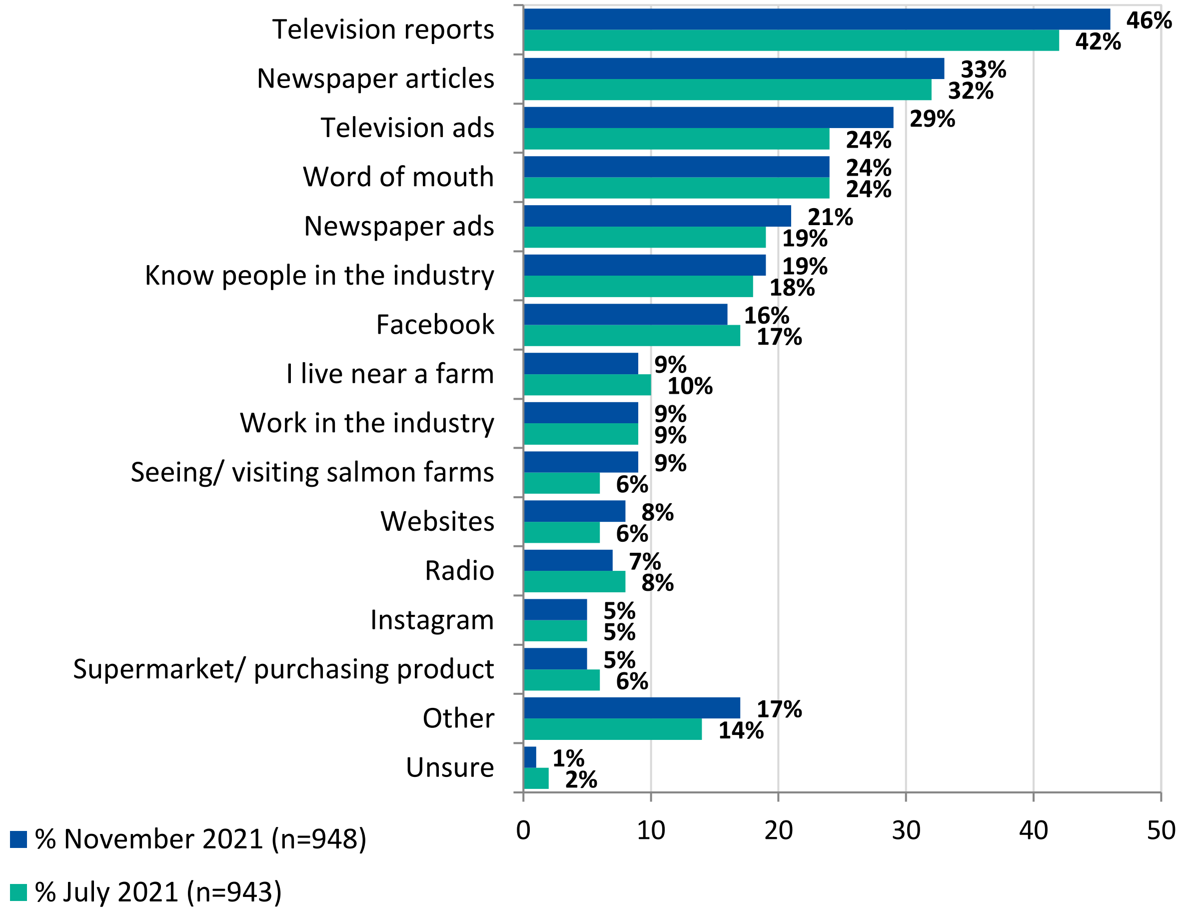
By demographic group in November 2021:

- Male respondents were significantly more likely to be **definitely aware** of the Tasmanian salmon farming industry (53%), compared to their female counterparts (41%).
- Respondents aged 18 to 24 years were significantly more likely to report being only **somewhat aware** (81%).

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 aware of the salmon farming industry)*



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

In November 2021, the most frequently reported channel of awareness of the salmon farming industry was again "television reports" (46%), followed by "newspaper articles" (33%).

A significant proportion also cited "television ads" (29%), "word of mouth" and "newspaper ads" (24% and 21% respectively).

High rates of mention were likewise recorded for "know people in the industry" (19%), and "Facebook" (16%).

The latest November results showed little variation from those recorded previously in the July 2021 round.

By demographic group in November 2021, older respondents aged 55 years or over were:

- Significantly more likely to cite **newspaper articles** as their channel of awareness (41%).
- Significantly less likely to cite **Facebook** (6%) and **Instagram** (2%).

"Other" channels mentioned in November 2021 by less than 5% included:

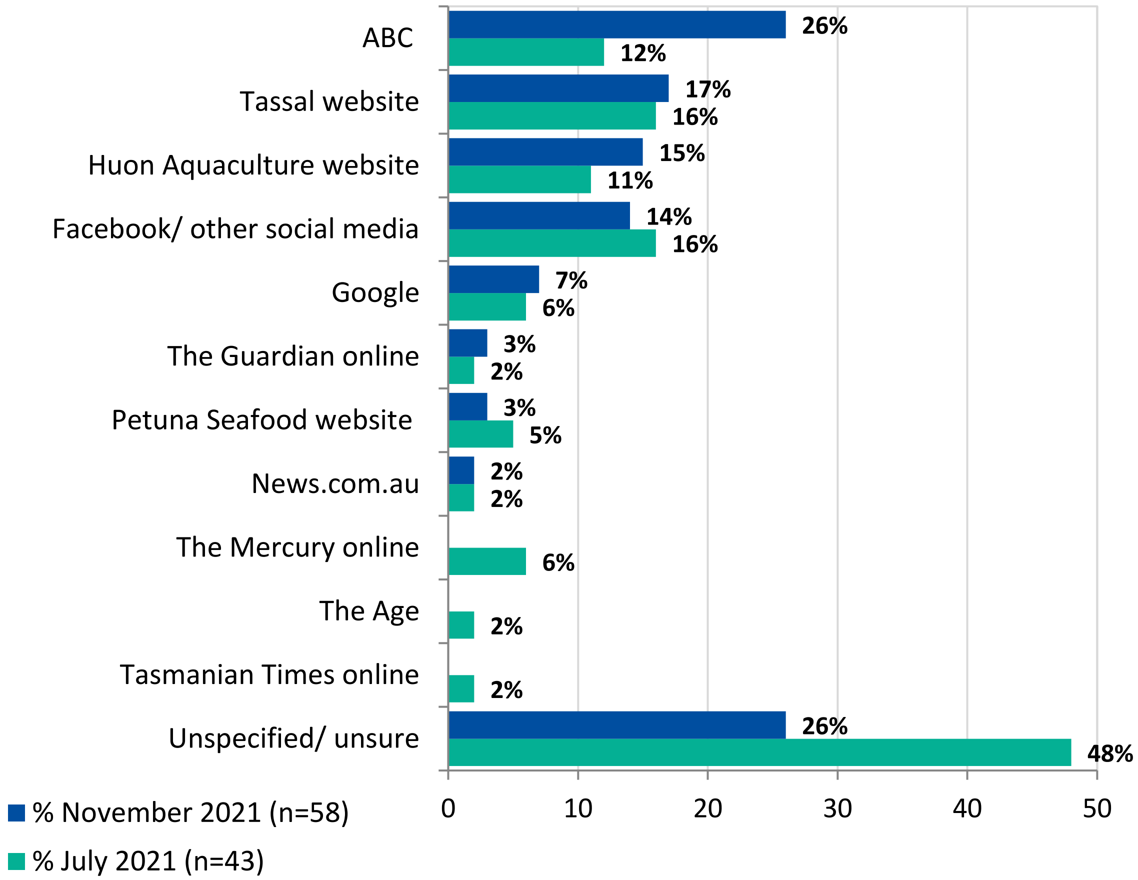
- *"School/ university"* (4%), *"books"* (4%), *"media - non-specific"* (4%), *"YouTube"* (3%), *"Snapchat"* (1%), *and "involved in recreational/ commercial fishing"* (1%).

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 aware of the salmon farming industry, and citing "websites" as a channel of awareness)*†



*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.

The respondents in November 2021 who had mentioned "websites" as a channel of their awareness of the salmon farming industry were most likely to specify the "ABC" news media website (26%).

Websites related to two of the state's salmon farming companies were next most frequently mentioned: namely, "Tassal" (17%) and "Huon Aquaculture" (15%).

All the charted responses should be regarded as indicative only, due to small sample sizes.

Whilst variations across the two research rounds were generally marginal, it was to be noted that in November 2021:

- The "ABC" was cited somewhat more frequently (by 26% currently, compared to 12% in July 2021).
- "The Mercury", "The Age" and "Tasmanian Times online" were not cited at all in the latest round, indicating, perhaps, their lower level of recent reporting on the salmon farming industry.

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

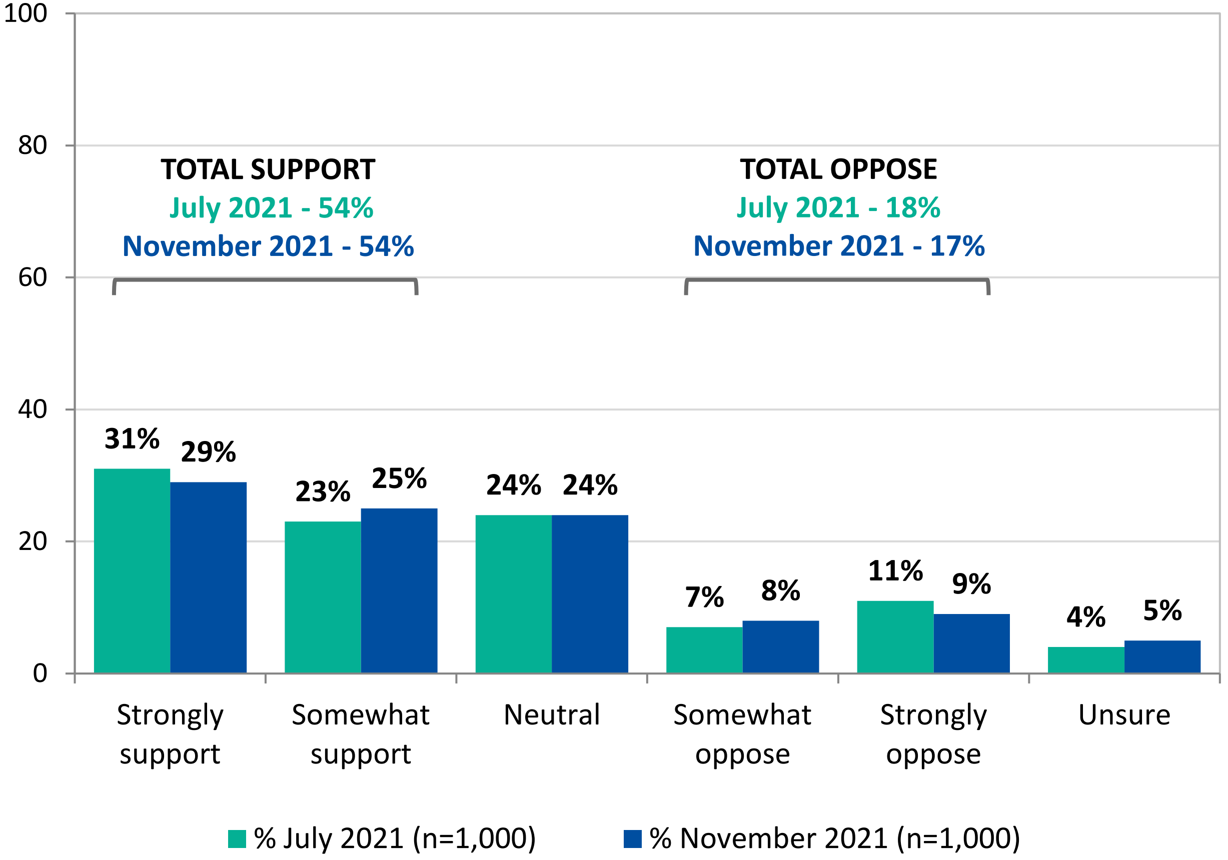
Q. Through which websites have you become aware of the industry?

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)



The majority of all respondents in November 2021 stated that they supported the Tasmanian salmon farming industry to some degree (54% in total).

Of these, a marginally greater proportion reported that they supported it "strongly" (29%).

Around one in four of the total sample had a neutral view (24%).

The smaller total sample of 17% of respondents who opposed the industry were virtually equally divided between those who did so "strongly" (9%) and those who did so "somewhat" (8%).

NET SUPPORT SCORE(†)

July 2021	November 2021
+36	+37

A Net Support Score of +37 is classified as "good".

The positive Net Support Score for the Tasmanian salmon farming industry recorded in November (+37) showed virtually no change from that established in July 2021 (+36). The segmented results presented in the chart also showed minimal variation.

†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 in November 2021, the following findings were noted.

Age

Younger respondents aged 18 to 44 years were:

- Significantly less likely to state they had some level of **support** for the Tasmanian salmon farming industry (45% in total), compared to those aged 45 years and over (60% in total).
- Significantly less likely to state they **strongly support** the industry (21%), compared to those aged 45 years and over (35%).
- Significantly more likely to hold a **neutral** position (32%), compared to those aged 55 years and over (19%).

Segmented further, those aged 70 years or over were:

- The most likely by far to state that they strongly support the industry (40%).

Gender

In the July research round, males had been significantly more likely to be in support of the Tasmanian salmon farming industry than females.

In November 2021, the gap had narrowed, with the levels of support and opposition showing only marginal variations across the genders.

Region

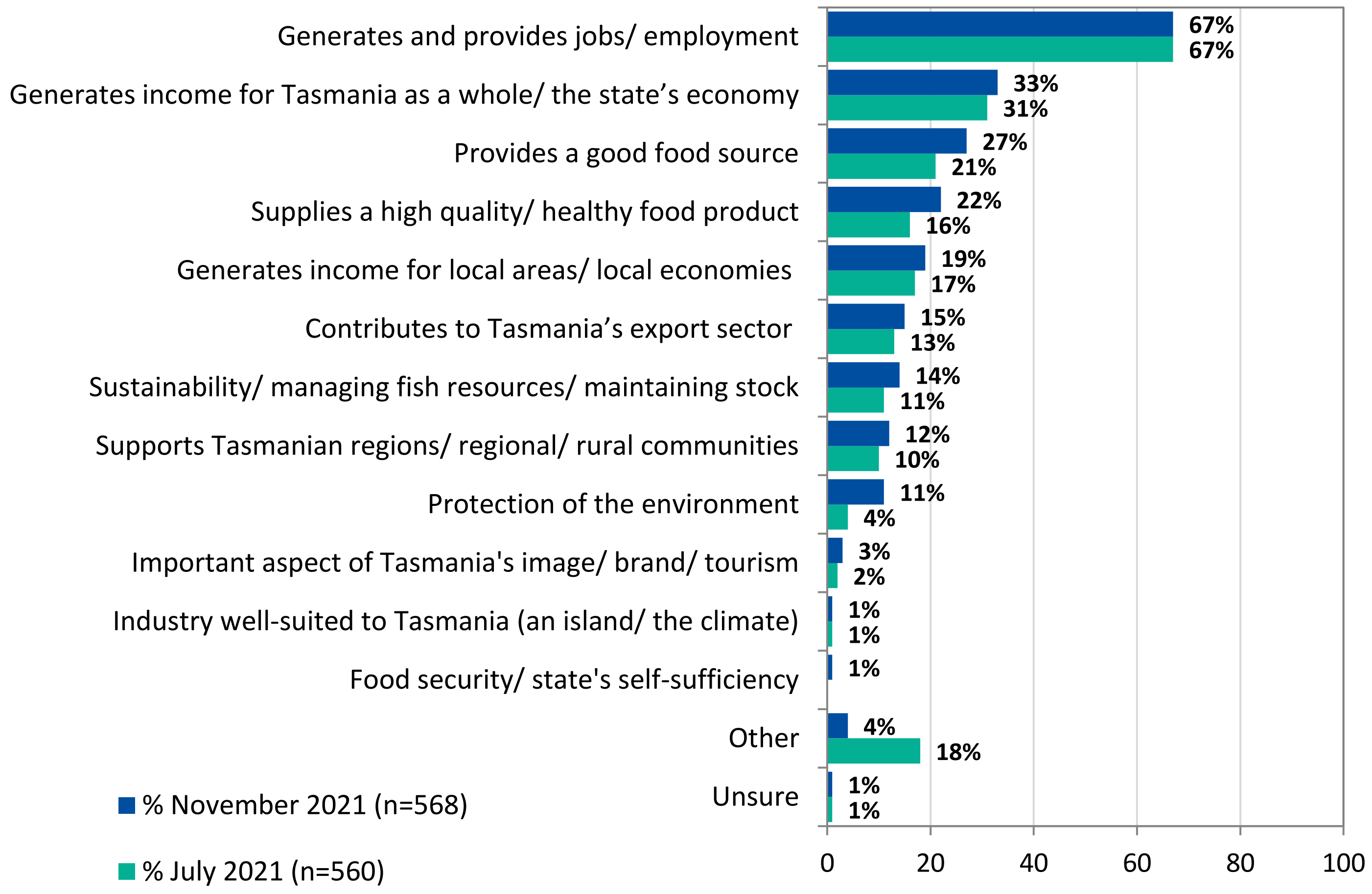
In the July research round, respondents in the North West of the state had been significantly more likely to be in support of the Tasmanian salmon farming industry than those resident in the other regions.

In November 2021, the gap had narrowed, with the levels of support and opposition showing only marginal variations across the regions.

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 in support of the salmon farming industry)*



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

In November 2021, the reason cited most frequently by far for supporting the Tasmanian salmon farming industry was again that "it generates and provides jobs/ employment" (67%).

Further economic benefits likewise recorded high rates of mention. Most notably, that the industry "generates income for Tasmania as a whole/ the state's economy" (33%).

Reasons centred on the provision of a good food source and a high-quality, healthy food product also figured prominently (mentioned by 38% in total).

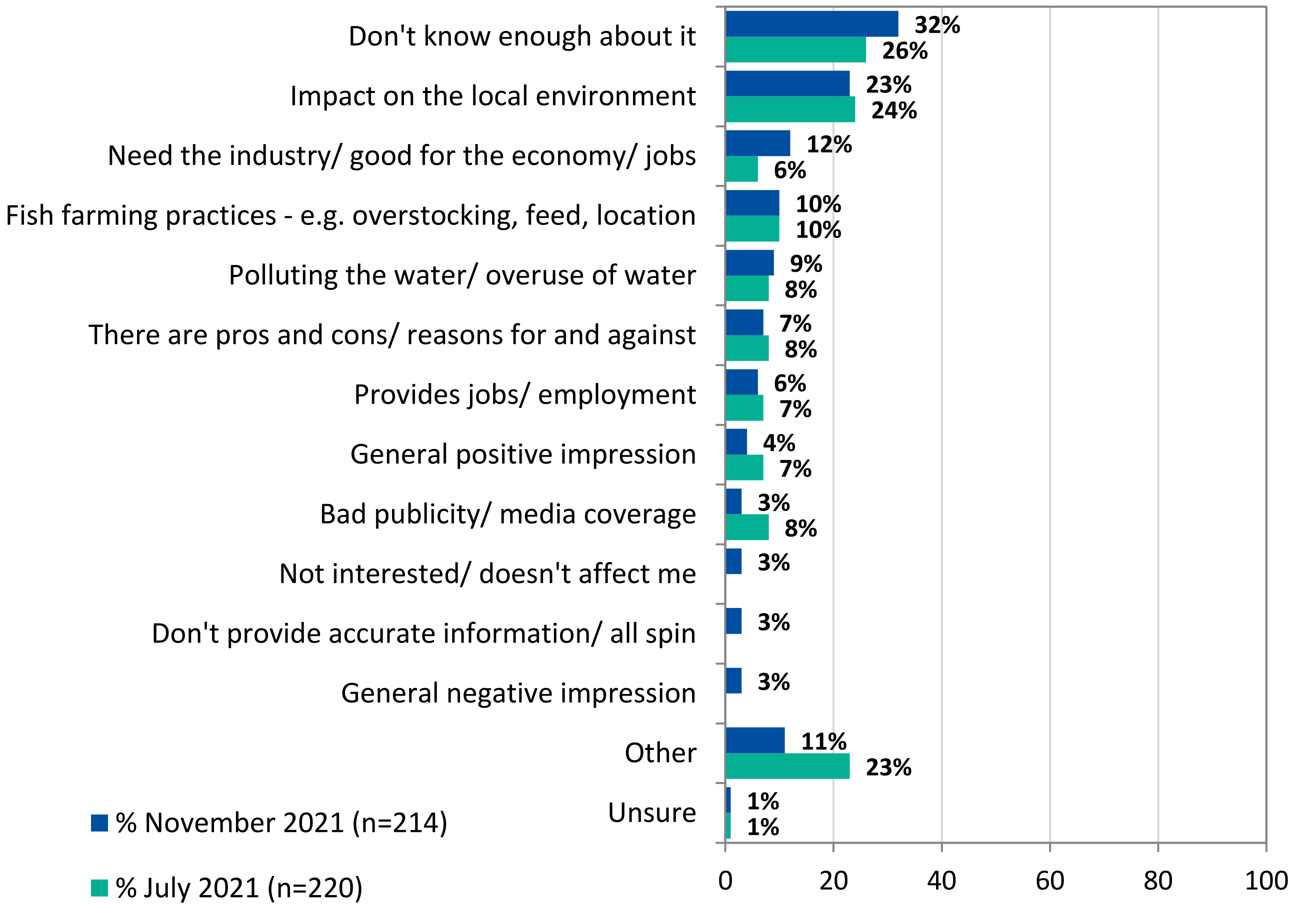
The latest November results showed minimal variation from those recorded previously in the July 2021 round.

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?

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" on the salmon farming industry)*



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

As in the previous round, the respondents who were currently neutral towards the Tasmanian salmon farming industry most frequently stated "don't know enough about it" as their reason (32%).

Among the concrete reasons provided, the "impact on the local environment" recorded by far the highest rate of mention (23%).

The latest November results showed only marginal variations from those recorded previously in the July 2021 round.

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

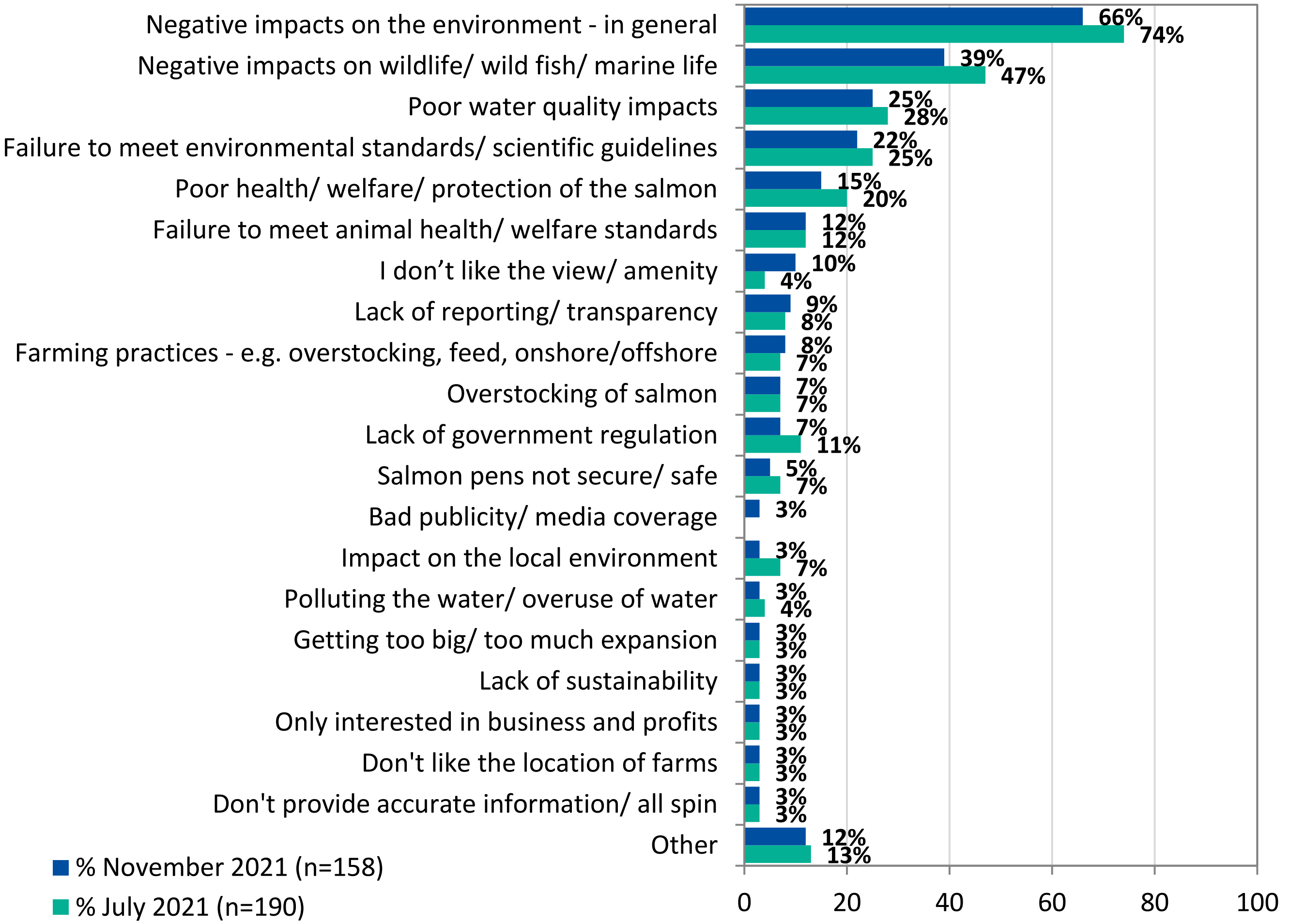
"Other" reasons mentioned in November 2021 by less than 3% included:

- *"Don't eat fish/ consume the product"* (2%), *"need to clean up their act/ improve"* (2%), *"only interested in business and profits"* (2%), *"lack of sustainability"* (1%), *"getting too big/ too much expansion"* (1%).

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 in opposition to the salmon farming industry)*



*Percentages do not sum to 100 due to multiple responses being possible. The n=2 "unsures" have not been included in the chart.

As previously, among the respondents who currently opposed the Tasmanian salmon farming industry, the reason or concern they mentioned most frequently by far was "negative impacts on the environment – in general" (66%).

A range of more specific environmental concerns also recorded high rates of mention: most notably, the "negative impacts on wildlife/ wild fish/ marine life" (39%).

On comparing the latest November results with those in July 2021, a marginal decrease was evident in the rate of mention of the two reasons above. Further tracking will indicate if this is an ongoing downward trend.

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

"Other" reasons mentioned in November 2021 by less than 3% included:

- *"Don't like the location of the farms"* (2%), *"of no benefit/ does not add value"* (2%), *"impact on recreational fishing"* (1%), *"don't eat fish/ consume the product"* (1%), *"getting too big/ too much expansion"* (1%), and *"only interested in business and profits"* (1%).

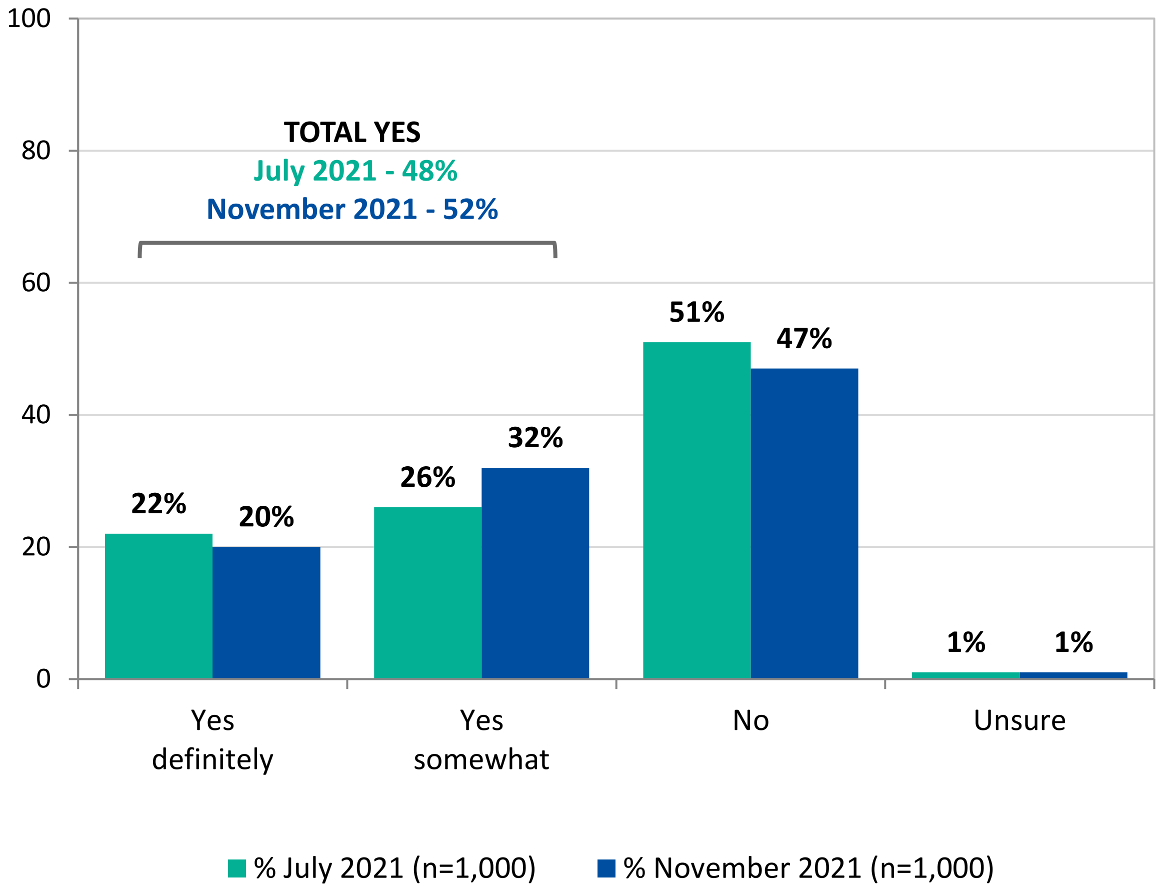
Q. What are your main reasons or concerns in opposing the Tasmanian salmon farming industry?

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)



In November 2021, the respondents in the full sample were marginally more likely to say "yes", that they would want to know or understand more about the Tasmanian salmon farming industry (52% in total), compared to those who said "no" (47%).

The figure of 52% stating "yes", and of these 20% saying "yes – definitely", indicates that there is an ongoing call for more information.

The latest November results showed only marginal variations from those recorded previously in the July 2021 round.

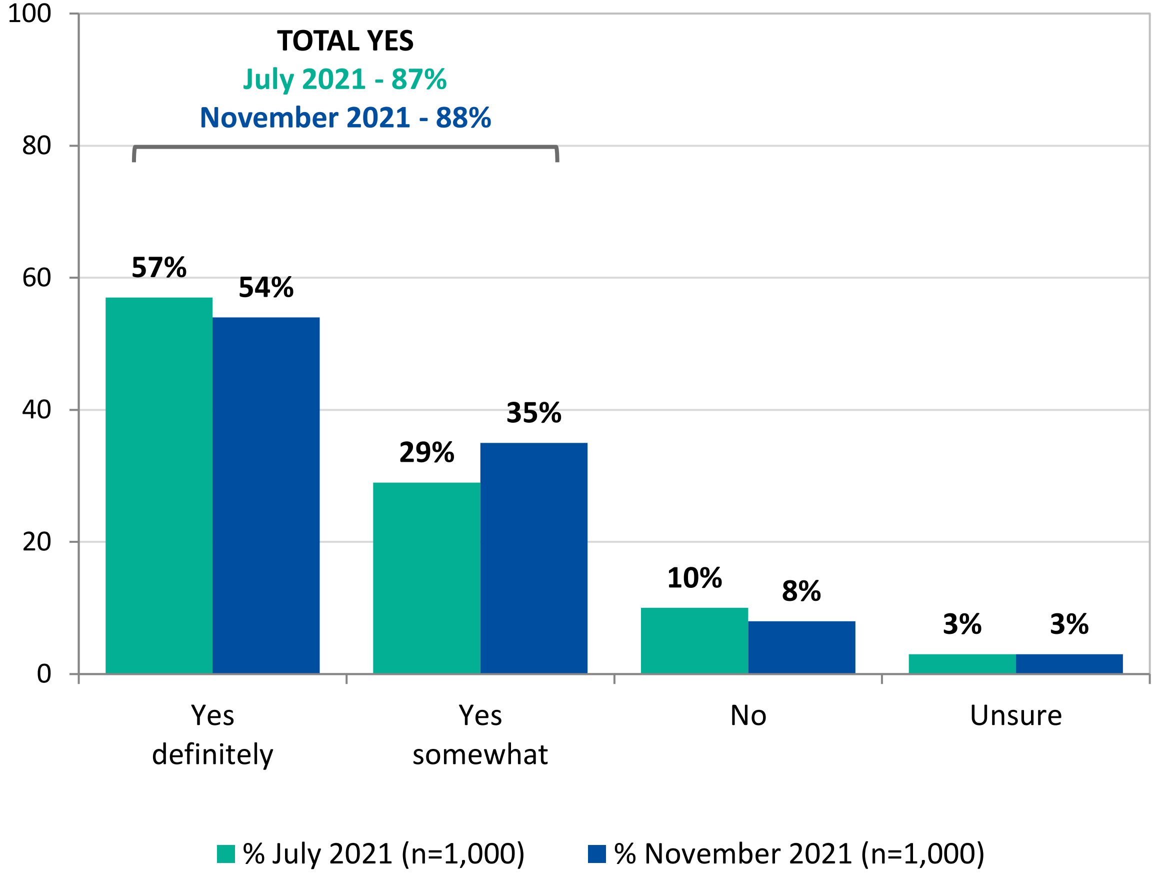
By demographic group in November 2021:

- Of all the age cohorts, respondents aged 70 years and over were the most likely by far to state **"no",** that they did not personally want to know or understand more about the industry (60%).

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.

In November 2021, as previously, a significantly higher proportion of all respondents said "yes", that they thought the public in general needed to know or understand more about the Tasmanian salmon farming industry (88% in total).

Of those stating yes, the clear majority again said "yes – definitely" (54%).

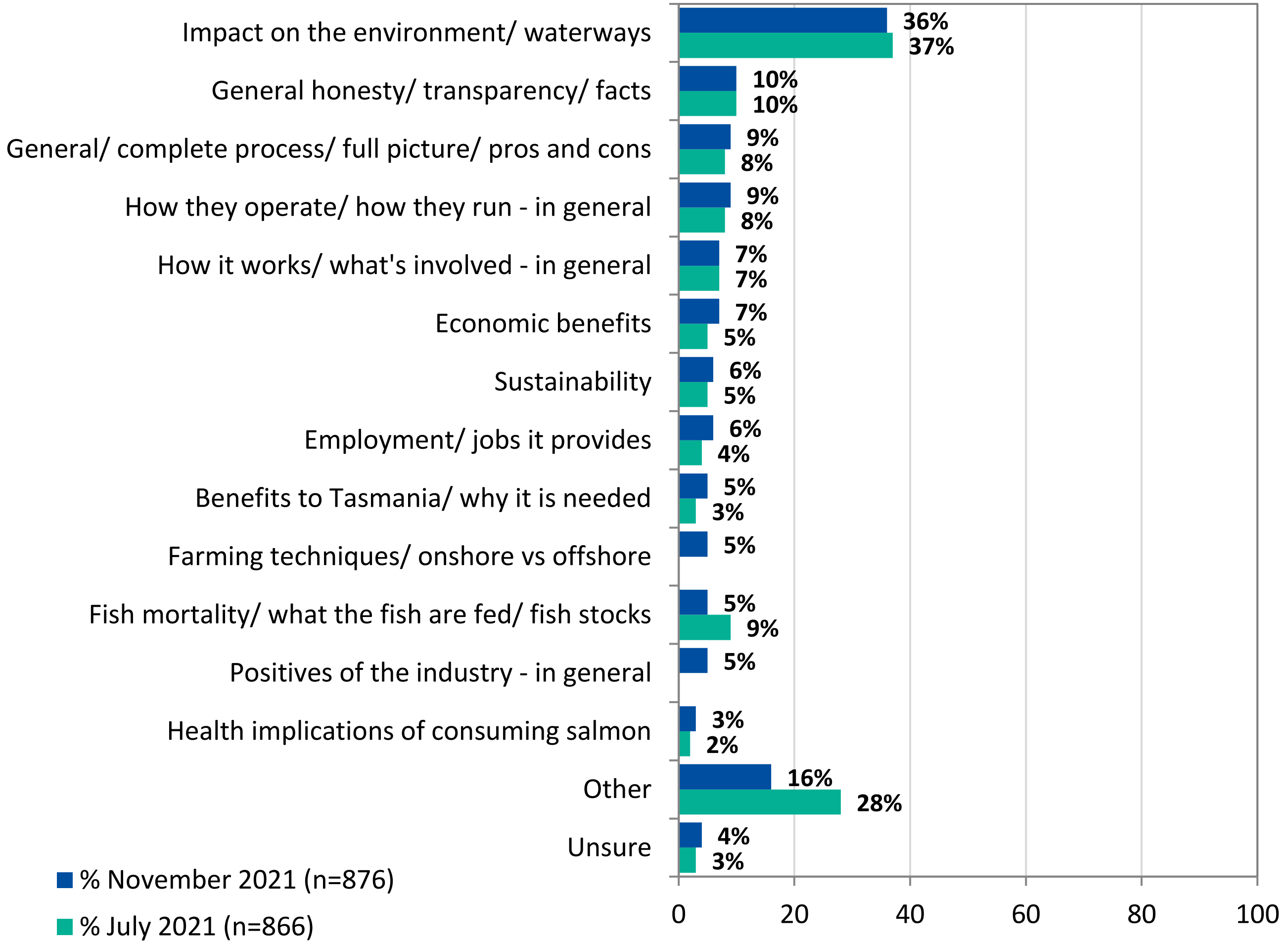
The latest November results showed only marginal variations from those recorded previously in the July 2021 round.

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)*



As in the previous round, among the respondents who currently 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" (36%).

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

The latest November responses showed minimal variation from those recorded previously in the July 2021 round.

By demographic group in November 2021:

- Young respondents aged 18 to 24 years were the most likely by far to cite information on the **"general/ complete process/ full picture/ pros and cons"** (30%).

"Other" aspects mentioned in November 2021 by less than 3% included:

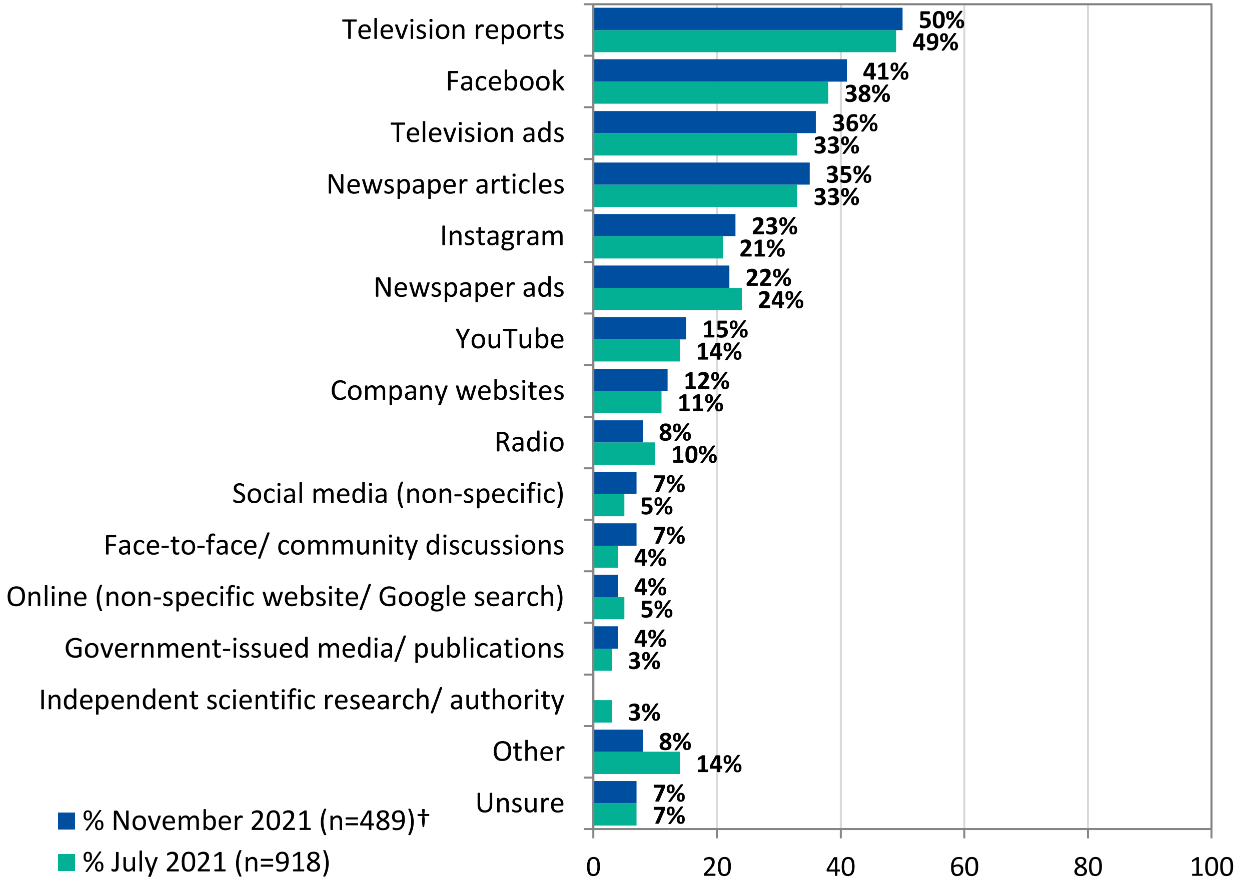
- *"That it can be conducted cleanly/ ethically"* (2%), *"regulations/ how it's regulated"* (2%), *"expansion plans/ future/ long-term plans"* (2%), *"more advertising/ awareness/ information"* (2%), *"updates/ how it's going/ is it having an impact"* (2%), *"how much waste is produced"* (1%), *"how they can farm better/ improve their practices"* (1%), *"it's a major industry in Tasmania"* (1%), *"support of the local community"* (1%), *"relationship with Government/ assistance"* (1%), and *"the effects of overfishing"* (1%).

*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)*



In November 2021, traditional media once again recorded high rates of mention as the best channels for providing information on the salmon farming industry: most notably, "television reports" (50%), "television ads" (36%) and "newspaper articles" (35%).

To be noted also was the significantly large proportion who again cited "Facebook" (41%) and, to a somewhat lesser degree, "Instagram" (23%).

The responses in November were broadly in line with those recorded previously in the July 2021 round.

By demographic group in November 2021:

- Respondents aged 18 to 44 years were significantly <u>more likely</u> to nominate **Facebook** and **Instagram** as the best channels for providing information (in total, 57% and 33% respectively), compared to those aged 55 years and over (21% and 13% respectively).

*Percentages do not sum to 100 due to multiple responses being possible, except "unsure" which was an exclusive answer.
†The smaller sample size in November 2021 was due to an electronic scripting error leading a portion of the respondents to skip this question. Nonetheless, the results remained in line with those of the previous July 2021 round.

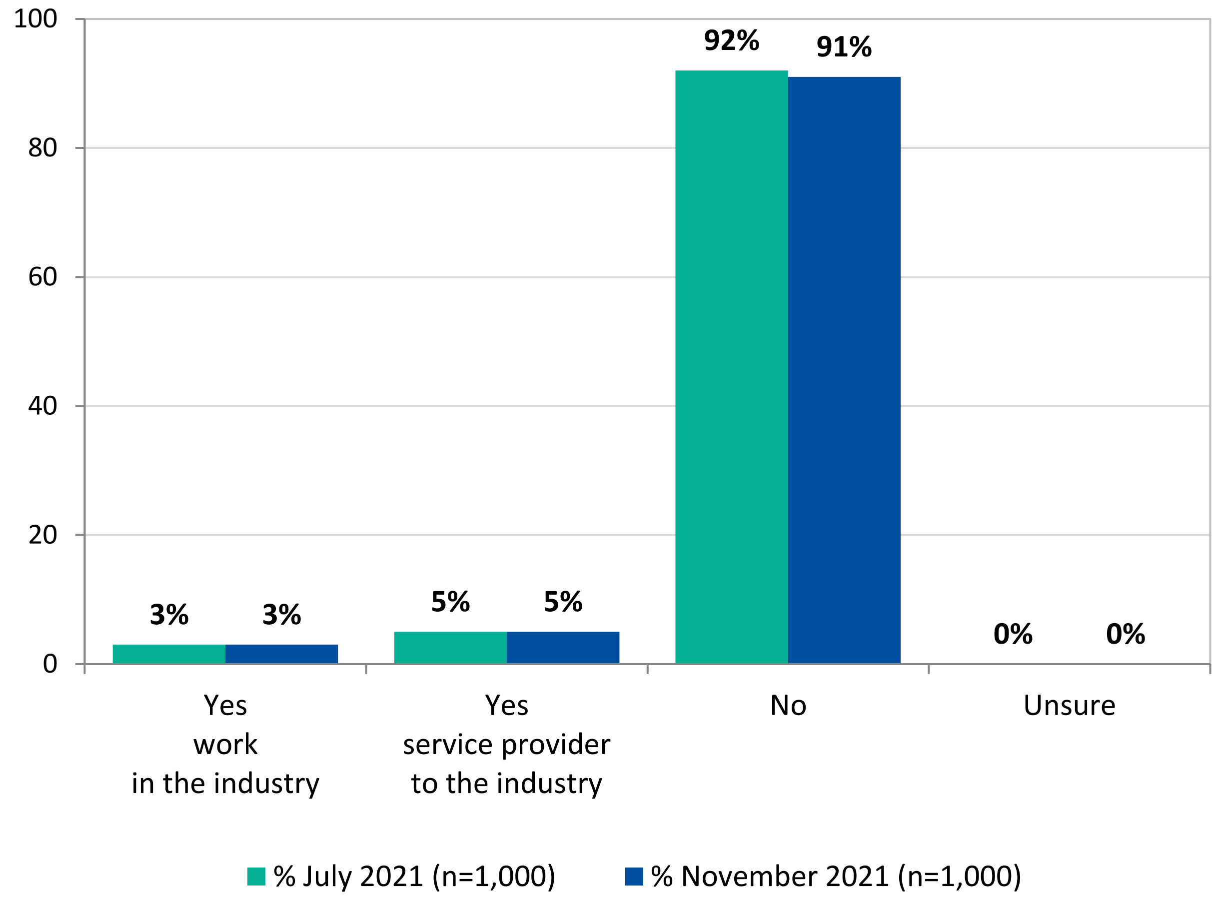
Q. Which channels do you think would be best for providing information on the Tasmanian salmon industry?

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)*



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

The great majority of respondents in November 2021 reported that "no", they had no direct experience of working in or being a service provider for the salmon farming industry (91%).

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

The November results were virtually unchanged from those recorded previously in the July 2021 round.

By demographic group in November 2021:

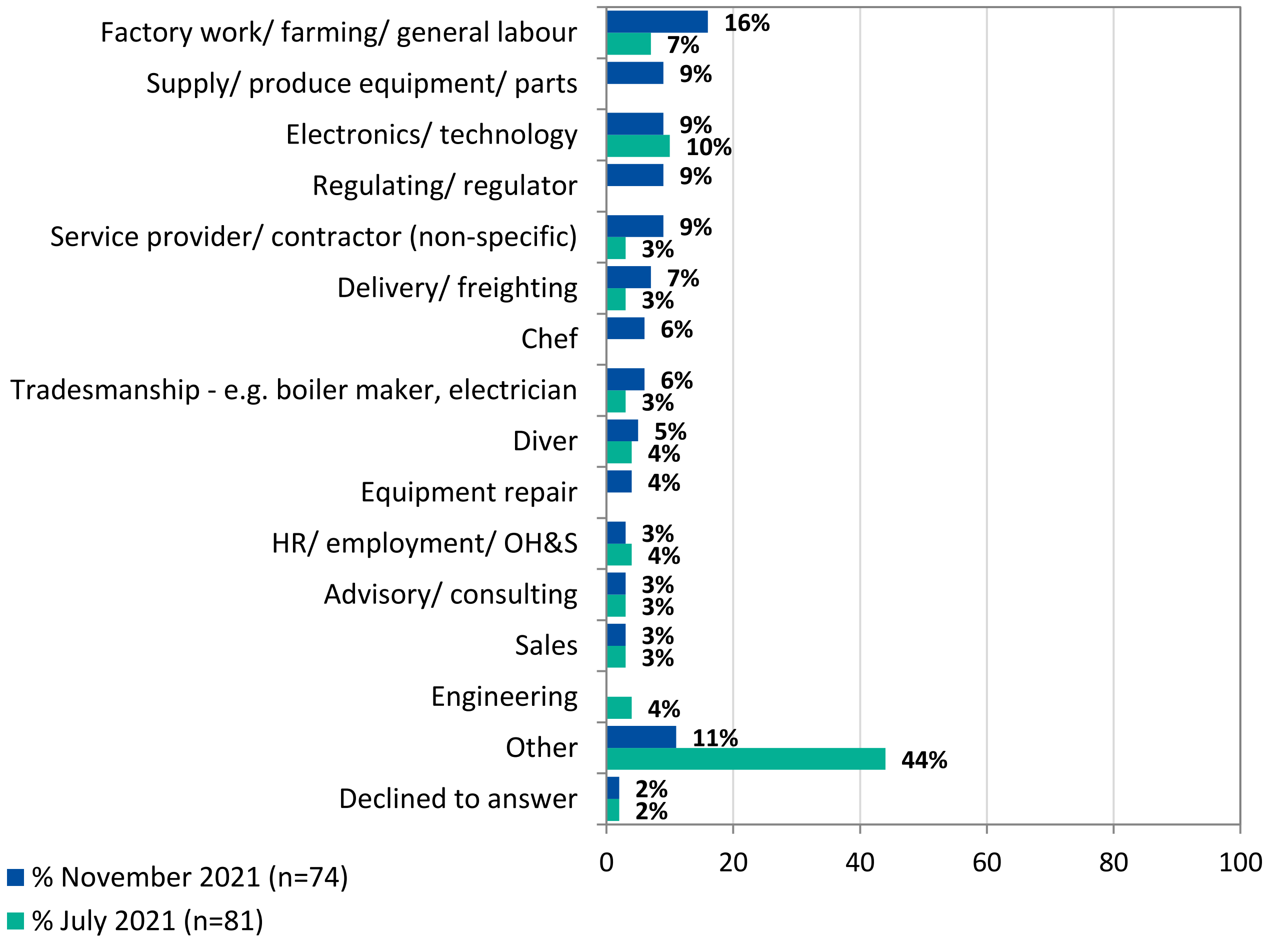
- Female respondents were significantly more likely to report having **no experience** with the industry (95%, compared to 87% of males).

There were no further significant findings to be noted in the responses across the population subgroups.

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

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 with personal experience working in/with the 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 16% or less.

Variations in the rate of mention of the work activities across the November and July 2021 research rounds remained well within the margin of error.

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

"Other" activities mentioned in November 2021 by less than 3% included:

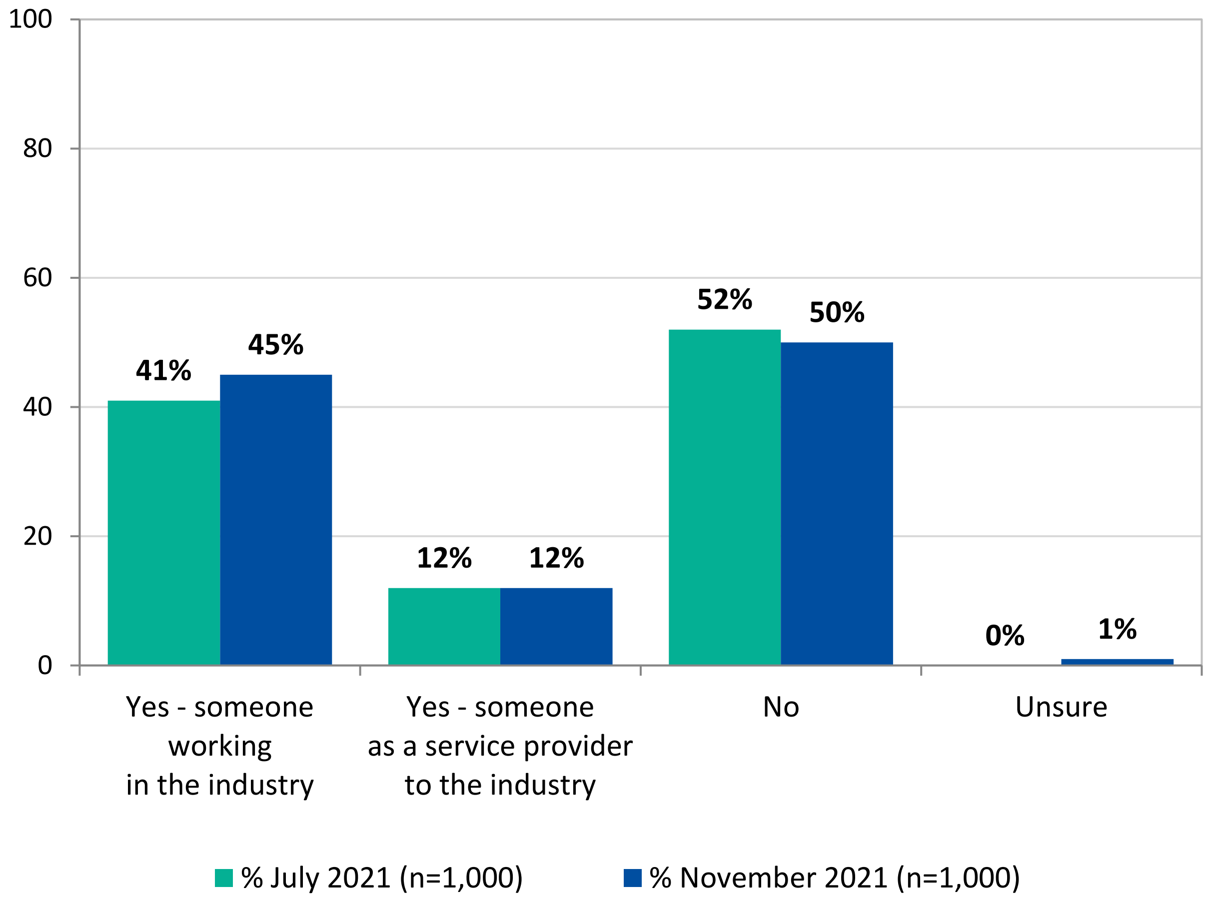
- *"Advertising/ marketing"* (2%), *"cleaner"* (2%), *"packing salmon"* (2%), *"breeding/ hatchery"* (2%), and *"management role"* (1%).

*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)*



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

A significantly greater proportion of the respondents in November 2021 said "yes", that they knew of someone else working in the salmon farming industry (45%), or who was a service provider to the industry (12%).

One half of the sample said "no", they did not (50%).

The November results were virtually unchanged from those recorded previously in the July 2021 round.

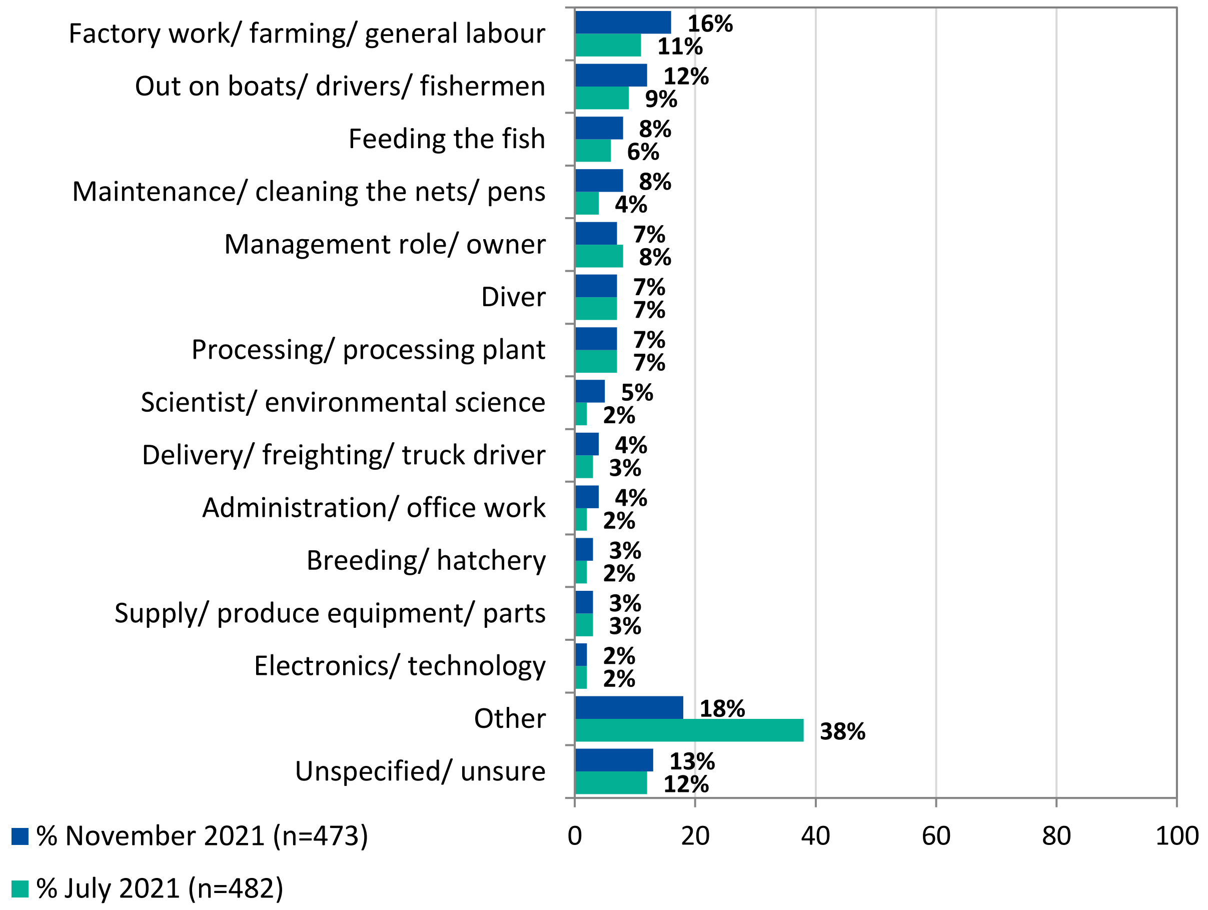
By demographic group in November 2021:

- Respondents aged 25 to 44 years were significantly more likely to **know someone working** in the industry (61% in total).
- Respondents in Hobart and the South East were significantly more likely to **know someone working** in the industry (53%) and **a service provider** to the industry (17%).
- Respondents in Launceston and the North East were significantly more likely to **know neither** (65%).

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 knowing someone with experience working in/with the 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 16% or less.

Variations in the rate of mention of the work activities across the November and July 2021 research rounds remained well within the margin of error.

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

"Other" activities mentioned in November 2021 by less than 2% included:

- *"HR/ employment/ OH&S", "advertising/ marketing", "equipment repair", "advisory/ consulting", "feed production/ supplier", "cleaning/ filleting fish", "service provider/ contractor", "aquaculturalist", "sales", "quality control assessment", "accountant", "engineering", "cleaner", "building/ supplier of pens", and "tradesmanship – e.g. boiler maker, electrician".*

*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 (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	
	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021
Maintain high animal health and welfare standards	94	93↑	81	81	13	12	2	4	2	1↓	1	1	2	0	1	1
Protect the natural environment and wildlife	93	92↑	81	80	12	11	3	5	3	2↓	1	1	2	1	1	1
Provide a high quality, healthy food product	93	92↑	81	79	12	14	3	4	3	3↓	1	1	2	2	1	0
Public transparency and reporting on its operations	88	88↑	69	69	20	20	8	8	3	3↓	1	2	2	1	1	1
Maintain sustainable fish stocks	87	87↑	70	66	17	21	5	7	5	3↓	2	1	3	2	3	2

In both research rounds, each of the above suggested ways for the salmon farming industry to contribute and engage recorded very high total levels of perceived importance, with those giving the highest scores of "4" or "5" ranging from 87% up to 93% of the full sample of respondents in November 2021.

Moreover, the respondents were significantly more likely to give the top score of "5", indicating that each element was "very important", in a range from 66% up to 81%.

The responses in November were closely in line with those recorded previously in the July 2021 round.

*Percentages may not sum to 100 due to rounding.

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".

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 (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	
	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021	Jul. 2021	Nov. 2021
Generate income for the local economy	84	84	62	58	22	26	10	11	5	4	3	3	2	2	1	1
Generate and provide training, jobs and employment	84	84	61	58	22	26	11	11	5	4	3	3	2	1	1	0
Support Tasmania's regions and regional communities	79	80	52	51	27	29	12	14	7	5	3	3	4	2	1	1
Support of local community events and groups	60	58↓	31	31	29	27	25	26↑	13	14↑	7	8	6	6	2	2
Community sponsorships and partnerships	56	51↓	27	27	28	23	26	31↑	15	15↑	9	9	6	6	3	3

As in the previous round, the total importance levels in November 2021 were significantly lower with respect to the last two of the above elements.

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.

The responses in November were closely in line with those recorded previously in the July 2021 round.

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 in November 2021, the only significant variations to be noted were those by gender in relation to the below.

"Maintain high animal health and welfare standards"

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

- Female respondents (97% in total, 88% of whom stated "very important"), compared to males (90% in total, 75% of whom stated "very important").

"Protect the natural environment and wildlife"

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

- Female respondents (95% in total, 86% of whom stated "very important"), compared to males (88% in total, 74% of whom stated "very important").

"Public transparency and reporting on its operations"

Somewhat more likely to rate this element as **"very important"** were:

- Female respondents (74%), compared to males (63%).

Similar variations when comparing the female and male responses to these elements had been noted in the July 2021 round.

The findings, confirmed in both rounds, provide an indication of where reassurance is sought – particularly by the female demographic of the Tasmanian population – and where potential lies for further consolidating a positive view and support of the industry.