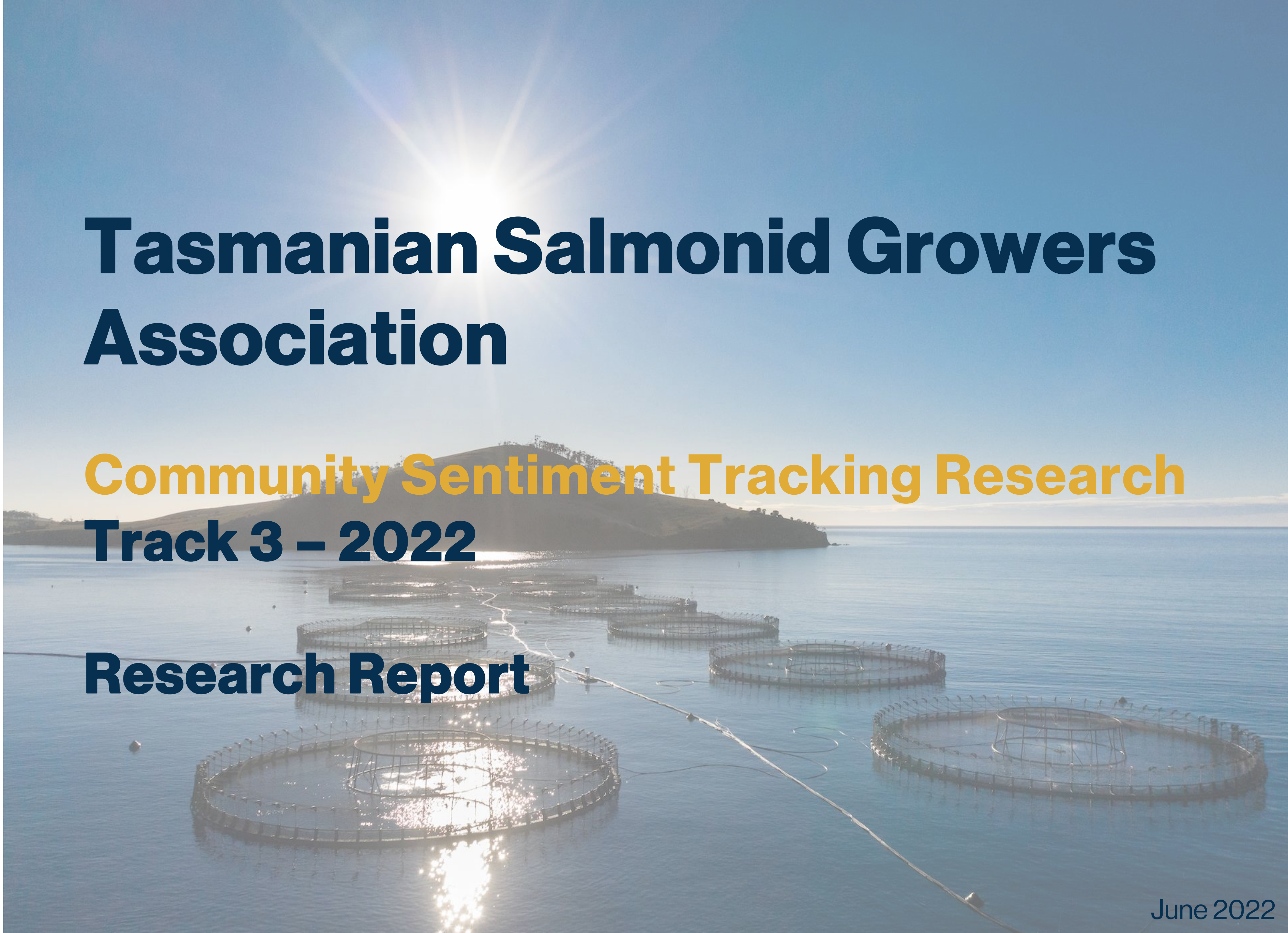

Tasmanian Salmonid Growers Association

Community Sentiment Tracking Research

Track 3 – 2022

Research Report

June 2022

emrs

Part of the C|T GROUP

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INTRODUCTION

INTRODUCTION
PURPOSE AND OBJECTIVES OF THE RESEARCH

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Introduction to the Research

The following Report provides the full set of results for the 2021-2022 Community Sentiment Tracking Research commissioned by the Tasmanian Salmonid Growers Association (TSGA). In June 2021, the TSGA commissioned EMRS, the Tasmanian-based independent research services provider, to undertake the baseline research, followed by Track 2 in November 2021. This latest Track 3 was conducted by EMRS in late May 2022.

Purpose of the Research

The purpose of the research was to gather feedback from Tasmanian residents aged 18 years and over to determine community awareness and perceptions of aquaculture and salmon farming in Tasmania. The results were to help gain a deeper understanding of the state's aquaculture industry overall, and its salmon farming component in particular.

Objectives of the Research

Specifically, the key informational objectives of the 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 this research with those of Tracks 1 and 2 in 2021.

INTRODUCTION
THE RESEARCH METHODOLOGY AND REPORTING

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 research tracks, 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 quality control and that the target sample sizes, and their distribution regionally, were met as closely as possible. The research was conducted between the 20th and the 27th of May 2022, with a total of n=1,000 respondents being successfully surveyed.

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 full results of all three tracks of the research. Where percentage figures do not sum to 100, an asterisked (*) comment explains whether it is due to rounding or the question allowing multiple responses. A dagger symbol (†) indicates where the sample size is small and caution should be exercised in interpreting the results.

The results have been presented predominantly 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.

INTRODUCTION
THE SAMPLE PROFILE

From the 20th to the 27th of May 2022, a total of n=1,000 adult Tasmanians were surveyed. The following table provides a breakdown of the demographic subgroups.

Gender	%	Number
Male	47%	474
Female	53%	526
Age	**%**	**Number**
18 to 24 years	7%	67
25 to 34 years	9%	94
35 to 44 years	10%	97
45 to 54 years	20%	203
55 to 69 years	30%	296
70 years or over	24%	243
Region	**%**	**Number**
South	50%	499
North	27%	274
North West	23%	227
TOTAL RESPONDENTS	**100%**	**1,000**

NOTE: Numbers and percentages here are unweighted. Elsewhere in the report, the percentage figures have been weighted to reflect the demographic profile of the target population.

KEY INSIGHTS

KEY INSIGHTS (1)

Importance Ranking of the Tasmanian Aquaculture Industry

(All respondents, n=1,000)

The clear majority of respondents in June 2022 gave the highest scores of “4” or “5” when rating the importance of the aquaculture industry to Tasmania.

- **69% TOTAL IMPORTANT** (75% - Nov. 2021, 72% - Jul. 2021)
  - 39% highest score of “5” (44% - Nov. 2021, 45% - Jul. 2021)
  - 30% next highest score of “4” (31% - Nov. 2021, 28% - Jul.2021)
- **21% neutral score of “3”** (16% - Nov. 2021, 18% - Jul. 2021)
- **8% TOTAL NOT IMPORTANT** (8% - Nov. 2021, 9% - Jul. 2021)
  - 3% lowest score of “1” (3% - Nov. 2021, 4% - Jul. 2021)
  - 5% next lowest score of “2” (6% - Nov. 2021, 4% - Jul. 2021)

(The variations across the three research rounds were marginal.)

NET IMPORTANCE SCORE[†]

July 2021	November 2021	June 2022
+64	+67	+61

A Net Importance Score of +61 is classified as “excellent”.

The very high level of importance attributed to the Tasmanian aquaculture industry that was established in July 2021 (+64) and November 2021 (+67) was again affirmed in the latest round (+61).

[†]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=690)

Unprompted, the reason given most frequently in June 2022 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* (34%)
- *Provides a good food source* (27%)
- *Contributes to Tasmania’s export sector* (24%)
- *Generates income for local areas/ local economies* (21%)
- *Supports Tasmanian regions/ regional/ local communities* (18%)

A rising trend was noted in the proportion of respondents mentioning that the aquaculture industry “supports Tasmanian regions/ regional/ rural communities” (18% currently, up from 10% in November 2021 and a significantly lower 6% in July 2021).

Reasons for Regarding the Aquaculture Industry as NOT Important to Tasmania

(Respondents giving low importance scores of “1” or “2”, n=81)

Unprompted, the reason specified most frequently in June 2022 for attributing a low level of importance to the industry was again:

- *Impact on the local environment* (33%), followed by
- *Polluting the water/ overuse of water* (16%)
- *Not a big employer/ good employer* (8%)

A decrease was noted in the proportion of respondents citing “impact on the local environment” (33% currently, compared to 47% in November 2021).

KEY INSIGHTS (2)

Awareness of the Tasmanian Salmon Farming Industry

(All respondents, n=1,000)

The clear majority of respondents in June 2022 reported that they were aware of the Tasmanian salmon farming industry to some degree.

- **93% TOTAL AWARE** (94% - Nov. 2021, 92% - Jul. 2021)
  - 47% "definitely aware" (47% - Nov. 2021, 47% - Jul. 2021)
  - 46% "somewhat aware" (47% - Nov. 2021, 45% - Jul.2021)
- **7% TOTAL UNAWARE** (6% - Nov. 2021, 8% - Jul. 2021)

(The variations across the three research rounds were marginal.)

Channels of Awareness of the Salmon Farming Industry

(Respondents aware of the industry, n=924)

The channel of awareness mentioned most frequently in June 2022 was again:

- *Television reports* (45%), followed by
- *Newspaper articles* (40%)
- *Television ads* (27%)
- *Facebook* (26%)
- *Newspaper ads* (18%)
- *Snapchat* (18%)

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

Variations to be noted were the increases in the proportion of respondents citing "Snapshot" (18% currently, up from 1% in November and 2% in July 2021) and "Facebook" (26% currently, up from 16% in November and 17% in July 2021).

Channels of Awareness of the Salmon Farming Industry Specific Websites

(Respondents aware of the industry and citing "websites" as a channel of awareness, n=63)

Among respondents in June 2022 citing websites in general as a channel of awareness, most frequently specified were:

- ***Huon Aquaculture website*** (26%)
- ***Tassal website*** (26%)
- ***Petuna Seafood website*** (20%)
- ***ABC*** (18%)

Whilst the variations across the three research rounds were generally marginal, it was to be noted that in June 2022:

- The "Petuna Seafood website" was cited significantly more frequently (by 20% currently, compared to 3% in November 2021 and 5% in July 2021).
- The "ABC" was cited somewhat less frequently (by 18% currently, compared to 26% in November 2021).

KEY INSIGHTS (3)

Support for or Opposition to the Tasmanian Salmon Farming Industry

(All respondents, n=1,000)

The majority of all respondents in June 2022 stated that they supported the Tasmanian salmon farming industry to some degree.

- **57% TOTAL SUPPORT** (54% - Nov. 2021, 54% - Jul. 2021)
  - 30% "strongly support" (29% - Nov. 2021, 31% - Jul. 2021)
  - 28% "somewhat support" (25% - Nov. 2021, 23% - Jul.2021)
- **19% neutral** (24% - Nov. 2021, 24% - Jul. 2021)
- **20% TOTAL OPPOSE** (17% - Nov. 2021, 18% - Jul. 2021)
  - 9% "strongly oppose" (9% - Nov. 2021, 11% - Jul. 2021)
  - 10% "somewhat oppose" (8% - Nov. 2021, 7% - Jul. 2021)

(The variations across the three research rounds were marginal.)

NET SUPPORT SCORE(†)

July 2021	November 2021	June 2022
+36	+37	+37

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

The positive Net Support Score for the Tasmanian salmon farming industry recorded in June 2022 (+37) showed virtually no change from that established in November 2021 (+37) and July 2021 (+36). The segmented results also showed minimal variation.

†The net support score was arrived at by subtracting the total percentage of those in opposition to the industry from the total percentage of those in support. A Net Support Score of +37 lies in the 0 to +49 range which is classified as "good".

Reasons for Supporting the Salmon Farming Industry

(Respondents in support of the industry, n=575)

Unprompted, the reason given most frequently in June 2022 for supporting the industry was again:

- *Generates and provides jobs/ employment* (73%), followed by
- *Generates income for Tasmania as a whole/ the state's economy* (34%)
- *Provides a good food source* (26%)
- *Generates income for local areas/ local economies* (23%)
- *Supports Tasmanian regions/ regional/ rural communities* (19%)
- *Supplies a high quality/ healthy food product* (19%)
- *Contributes to Tasmania's export sector* (19%)

To be noted was the steady rising trend in the proportion of respondents mentioning that the industry "supports Tasmanian regions/ regional/ rural communities" (19% currently, up from 12% in November 2021 and 10% in July 2021).

Reasons for the Neutral Position on the Salmon Farming Industry

(Respondents neutral in their position on the industry, n=192)

Unprompted, the reason provided most frequently in June 2022 for holding a neutral position on the industry was again:

- *Don't know enough about it* (28%), followed by
- *Impact on the local environment* (22%)
- *Fish farming practices – e.g. overstocking, feed, onshore/ offshore* (15%)
- *Need the industry/ good for the economy/ jobs* (13%)
- *Polluting the water/ overuse of water* (11%)

(The results in the latest round were generally in line with those recorded previously.)

KEY INSIGHTS (4)

Reasons for Opposing the Salmon Farming Industry

(Respondents in opposition to the industry, n=197)

Unprompted, the reason given most frequently in June 2022 for opposing the industry was again:

- *Negative impacts on the environment* (69%), followed by
- *Negative impacts on wildlife/ wild fish/ marine life* (49%)
- *Poor water quality impacts* (26%)
- *Failure to meet animal health/ welfare standards* (24%)
- *Poor health/ welfare/ protection of the salmon* (23%)
- *Failure to meet environmental standards/ scientific guidelines* (23%)

To be noted was the increase in mentions of the "failure to meet environmental standards/ scientific guidelines" (23% currently, up from 12% in both November 2021 and July 2021).

As in the previous rounds, environmental concerns again emerged most strongly for being in opposition to the industry.

Several similar concerns were also mentioned by respondents who held a neutral position.

From this it can be concluded that addressing environmental concerns, together with strong promotion of the economic benefits of the industry, will be the key drivers for shifting views to one of support.

Call for More information on the Salmon Farming Industry

(All respondents, n=1,000)

In June 2022, one half of all respondents said "yes", that they personally wanted to know or understand more about the industry:

- **50% TOTAL YES** (52% - Nov. 2021, 48% - Jul. 2021)
  - 21% "yes - definitely" (20% - Nov. 2021, 22% - Jul. 2021)
  - 28% "yes - somewhat" (32% - Nov. 2021, 26% - Jul.2021)
- **49% TOTAL NO** (47% - Nov. 2021, 51% - Jul. 2021)

(The variations across the three research rounds were marginal.)

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

(All respondents, n=1,000)

In June 2022, a significantly higher proportion of respondents again said "yes", that they thought the public in general needed to know or understand more about the Tasmanian salmon farming industry.

- **87% TOTAL YES** (88% - Nov. 2021, 87% - Jul. 2021)
  - 54% "yes - definitely" (54% - Nov. 2021, 57% - Jul. 2021)
  - 33% "yes - somewhat" (35% - Nov. 2021, 29% - Jul.2021)
- **9% TOTAL NO** (8% - Nov. 2021, 10% - Jul. 2021)

(The variations across the three research rounds were marginal.)

KEY INSIGHTS (5)

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 again in June 2022 was:

- *Impact on the environment/ waterways* (35%)

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

The further responses were wide-ranging, each mentioned by small samples of 6% or less. They provide additional insights on what could be communicated more clearly to the public (see Chart 13, p.33). There were minimal variations in the responses across the two research rounds.

Best Channels for Providing Information about the Salmon Farming Industry

(Respondents stating they or the public needs to know more, n=921)

The channel mentioned most frequently in June 2022 for best communicating information about the industry was again:

- *Television reports* (46%), followed by
- *Facebook* (35%)
- *Television ads* (29%)
- *Newspaper articles* (27%)
- *YouTube* (19%)
- *Instagram* (19%)
- *Newspaper ads* (17%)
- *Company websites* (13%)

Direct Connections with the Salmon Farming Industry in Tasmania – June 2022

(All respondents, n=1,000)

- **91% of all respondents 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.** Similarly small samples confirmed that "yes", they **worked in the industry** (3%), or were **service providers** to the industry (6%).
  - Among the sample of respondents with personal experience of working in the industry or being a service provider (n=90), the nature of the work covered a wide range of roles and activities, each mentioned by 9% or less (Chart 16, p.37 presents the responses given).
- **A significantly greater proportion of the full sample of respondents said "yes", they knew someone else working in the salmon farming industry (43%), or who was a service provider to the industry (13%).** 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.39 presents the responses given).

(The variations across the three research rounds were marginal.

KEY INSIGHTS (6)

The suggested ways for the Tasmanian salmon farming industry to contribute and engage that recorded the highest total levels of perceived importance, with top scores of "4" or "5" in June 2022, were:

- **Maintain high animal health and welfare standards** (92% in total, 82% a top score of "5")
- **Protect the natural environment and wildlife** (91% in total, 81% a top score of "5")
- **Provide a high quality, healthy food product** (91% in total, 77% a top score of "5")
- **Public transparency and reporting on its operations** (87% in total, 70% a top score of "5")
- **Maintain sustainable fish stocks** (86% in total, 70% a top score of "5")

Elements that recorded the next highest total levels of perceived importance in June 2022, with top scores of "4" or "5", were:

- **Generate income for the local community** (83% in total, 59% a top score of "5")
- **Generate income and provide training, jobs and employment** (83% in total, 59% a top score of "5")
- **Support Tasmania's regions and local communities** (76% in total, 51% a top score of "5")

The two elements that recorded the lowest total levels of perceived importance in June 2022, with top scores of "4" or "5", were:

- **Support of local community events and groups** (57% in total, 29% a top score of "5")
- **Community sponsorships and partnerships** (53% in total, 26% a top score of "5")

It should be noted that, in all instances, the total proportion of respondents giving the highest importance scores of "4" or "5" were in the clear majority.

In the June 2022 round:

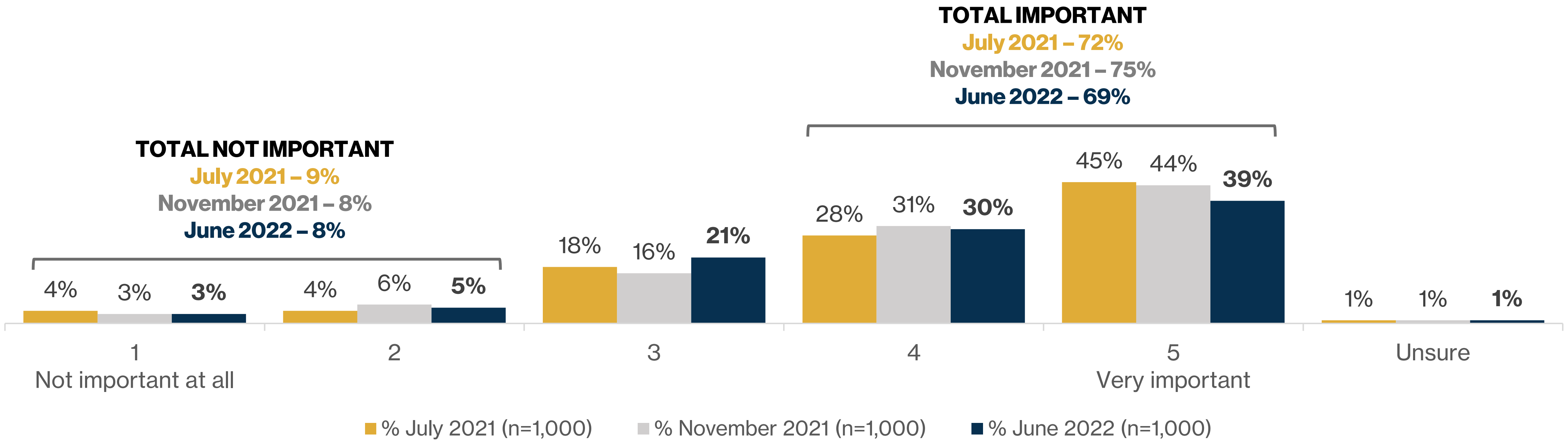
- The highest importance tended to be attributed to elements regarding animal welfare, environmental protection, and the provision of a good food product.
- Significantly high importance levels were also recorded for public transparency and reporting, along with the maintenance of sustainable fish stocks.
- The 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 latest responses were closely in line with those recorded in the previous research rounds.

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 the latest round, a combined total of 69% 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, and the greater proportion rating it at a top score of "5" (39%).

Demographically, there were no significant findings to be noted.

*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".

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".

NET IMPORTANCE SCORE(†)

July 2021	November 2021	June 2022
+64	+67	+61

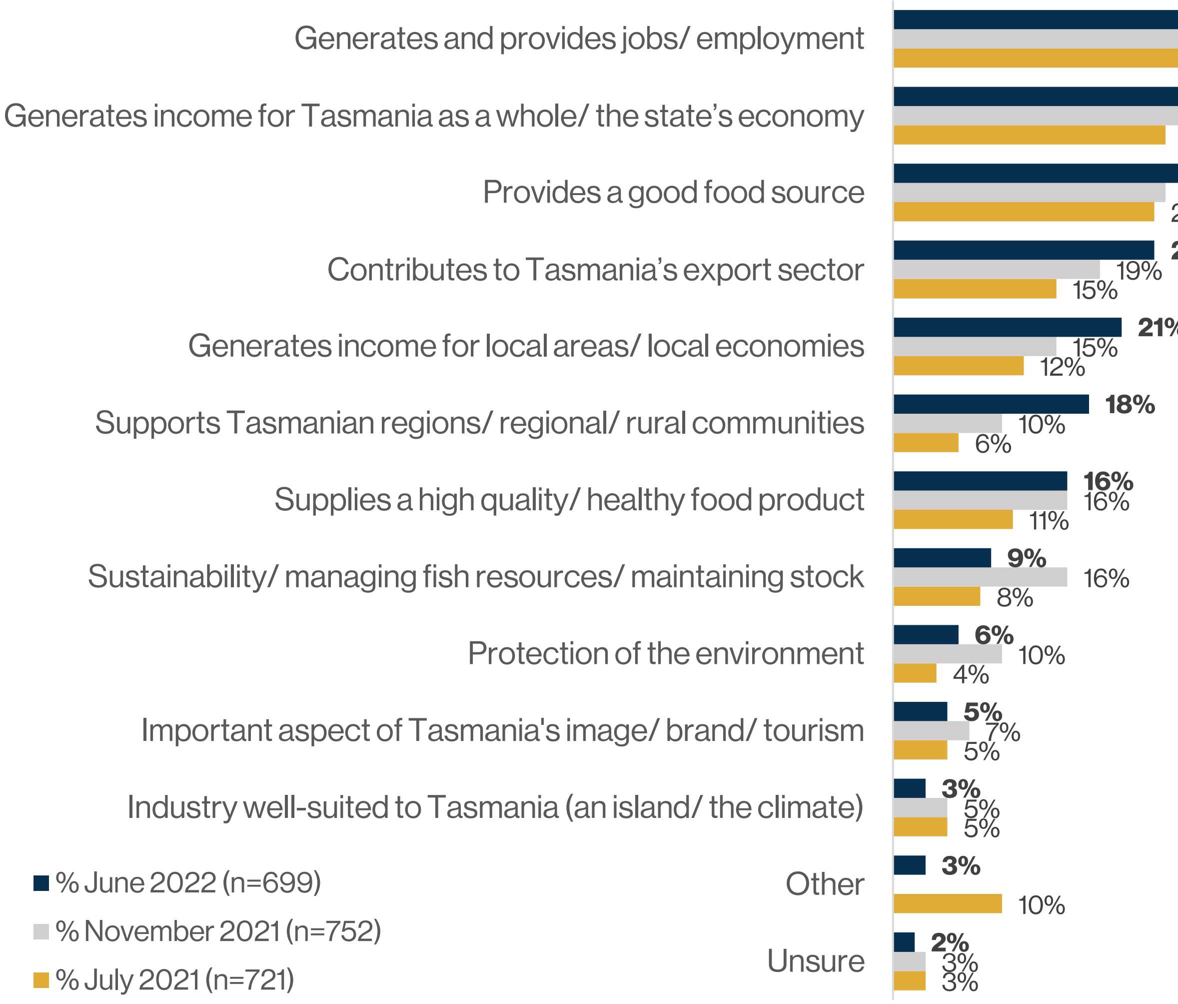
A Net Importance Score of +61 is classified as "excellent".

The very high level of importance attributed to the Tasmanian aquaculture industry that was established in July 2021 (+64) and November 2021 (+67) was again affirmed in the latest round (+61).

WHY THE AQUACULTURE INDUSTRY IS IMPORTANT TO TASMANIA

Chart 2 – Why the Aquaculture Industry is Important to Tasmania

(Percentage of respondents ranking it as important with scores of “4” or “5”)*



The respondents who gave the highest scores of “4” or “5” for the importance of the aquaculture industry to Tasmania mentioned most frequently that “it generates and provides jobs/ employment” as the reason (62%).

A further economic benefit also recorded a high rate of mention: namely, that it “generates income for Tasmania as a whole/ the state’s economy” (34%).

The results in the latest round were generally in line with those recorded in November 2021. The most notable variation was the rising trend in the proportion of respondents mentioning that the aquaculture industry “supports Tasmanian regions/ regional/ rural communities” (18% currently, up from 10% in November 2021 and a significantly lower 6% in July 2021).

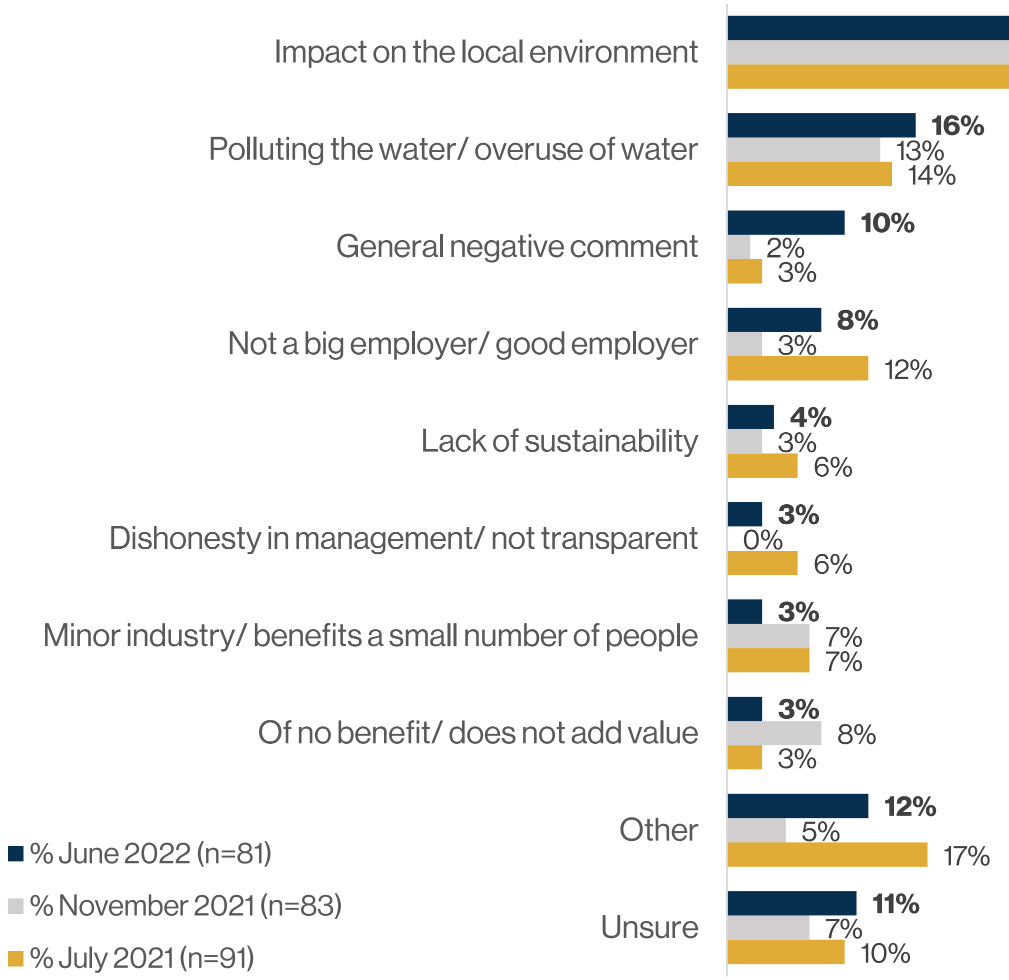
* Percentages do not sum to 100 due to multiple responses.

Q. Why is the aquaculture industry important to Tasmania?

Demographically, there were no significant findings to be noted.

WHY THE AQUACULTURE INDUSTRY IS NOT IMPORTANT TO TASMANIA

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 (n=83) who ranked the Tasmanian aquaculture industry at the lowest importance scores of "1" or "2", the reason they mentioned most often was its "impact on the local environment" (33%).

A more specific environmental aspect was cited next most frequently: namely, it "polluting the water/ overuse of water" (16%).

The results in the latest round were generally in line with those recorded previously. The most notable variation was the decrease in the proportion of respondents citing "impact on the local environment" (33% currently, compared to 47% in November 2021).

Responses by less than 3%, not detailed in the chart, included: *"Fish farming practices, e.g. overstocking, feed, onshore/ offshore"*, *"Only interested in business and profits"* (2% in each case); *"Effect on Tasmanian image/ tourism"* (1%).

Demographically, there were no significant findings to be noted.

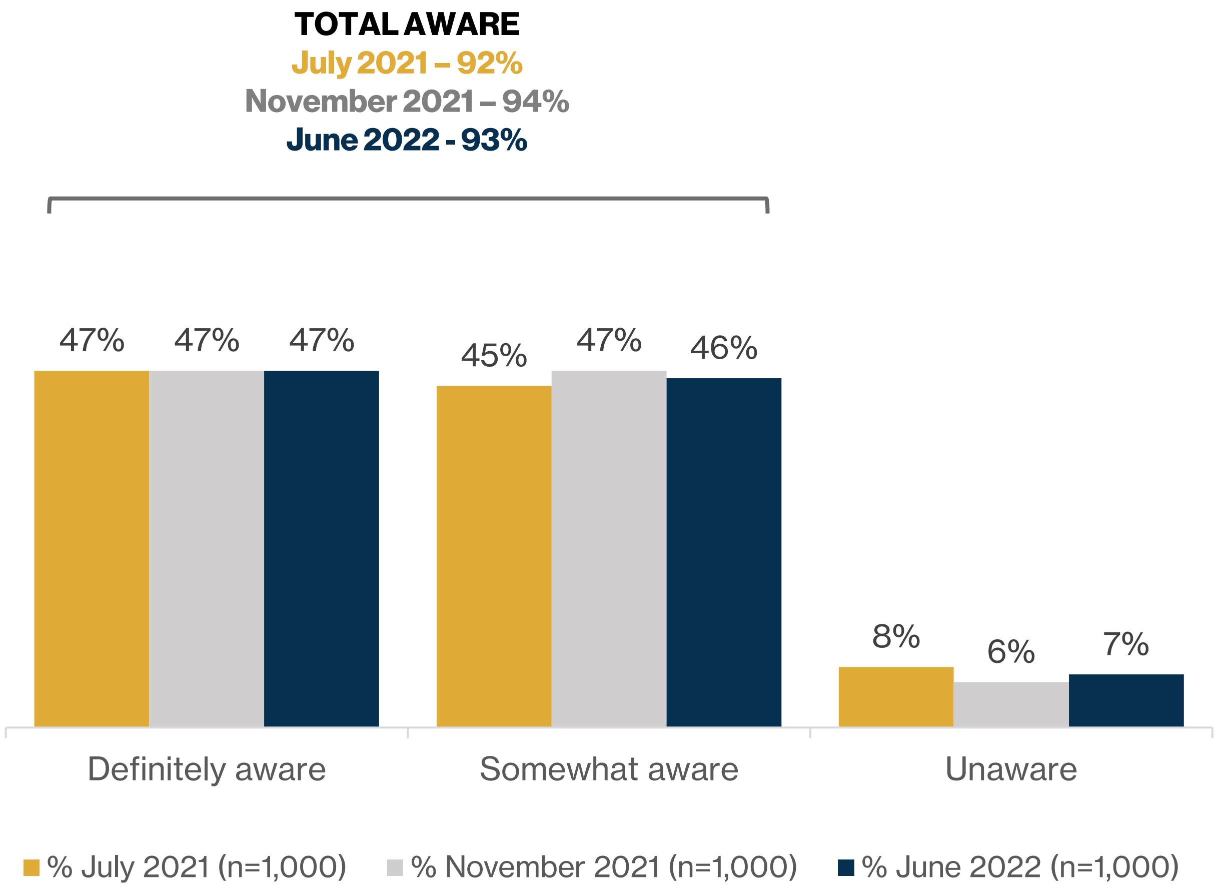
* Percentages do not sum to 100 due to multiple responses.

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

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 (93% 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" (46%).

A relatively small proportion said they were "unaware" (7%).

The latest June 2022 results closely mirrored those recorded previously in the November and July 2021 rounds.

Demographically:

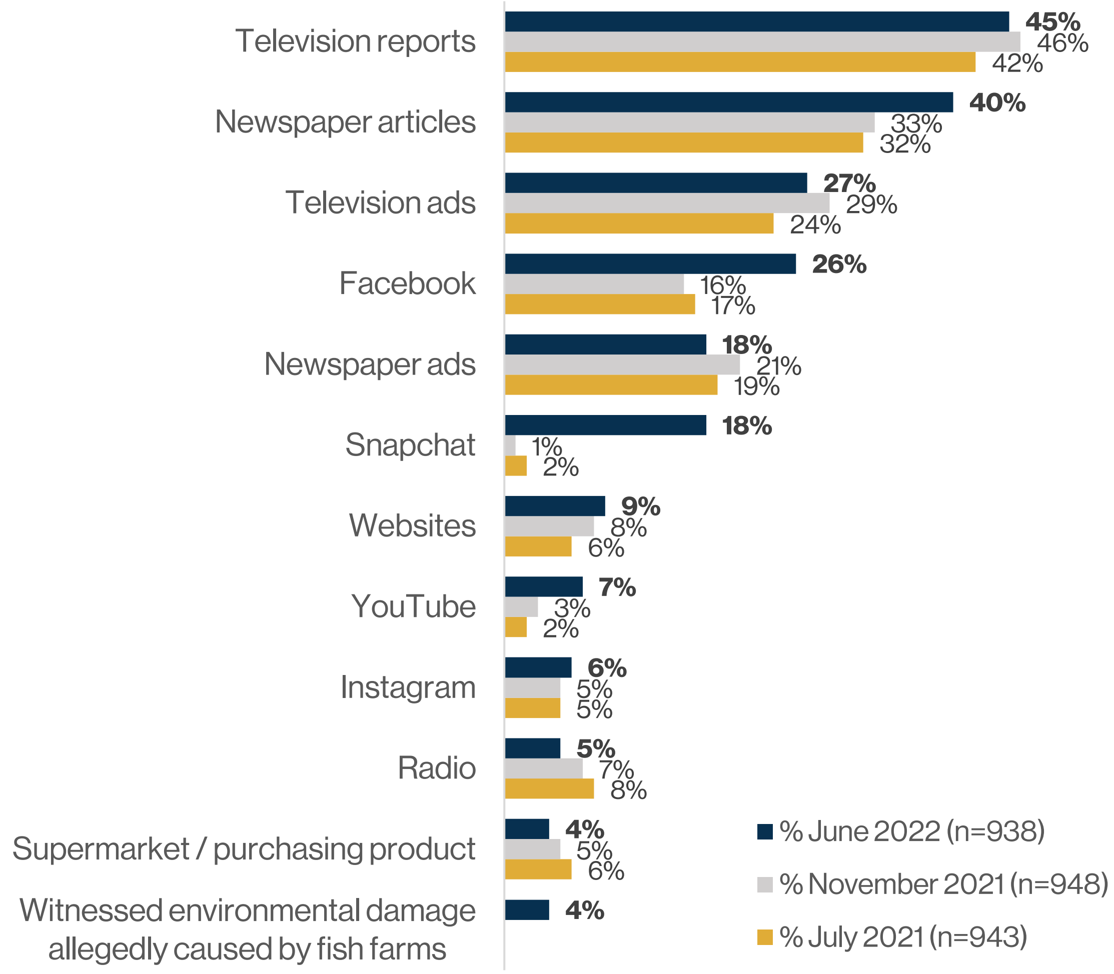
- Respondents aged 18 to 24 years were significantly more likely to be "unaware" of the Tasmanian salmon farming industry (30%) compared to their older counterparts.
- Male respondents were significantly more likely to be "definitely aware" (52%) compared to females (41%).

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

CHANNELS OF AWARENESS OF THE TASMANIAN SALMON FARMING INDUSTRY (1)

Chart 5 – Channels of Awareness of the Salmon Farming Industry

(Percentage of respondents "definitely" or "somewhat" aware of the salmon farming industry)*



The respondents aware of the salmon farming industry most frequently mentioned "television reports" (45%) and "newspaper articles" (40%) as the channels of their awareness.

A significant proportion of around one in four cited "television ads" and "Facebook" (27% and 26% respectively).

Relatively high rates of mention were also recorded for "newspaper ads" and "Snapchat" (18% in each case).

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 "Snapshot" (18% currently, up from 1% in November and 2% in July 2021) and "Facebook" (26% currently, up from 16% in November and 17% in July 2021).

Responses by less than 4%, not detailed in the chart, included: *"Media (non-specific)", "Seeing / visiting salmon farms", "Work in the industry", "Book/s"* (3% in each case); *"Social media - non-specific"* (2%); *"I live near a fish farm", "Own research", "Lobbying/ demonstrations/ bad press", "I am involved in recreational/ commercial fishing", "School/ university", "Employer does business with the industry", "Know people in the industry", "Always known/ local knowledge"* (1% in each case).

Demographically:

- Respondents aged 18 to 24 years were significantly more likely to report becoming aware of the Tasmanian salmon farming industry through "Facebook" (55%).

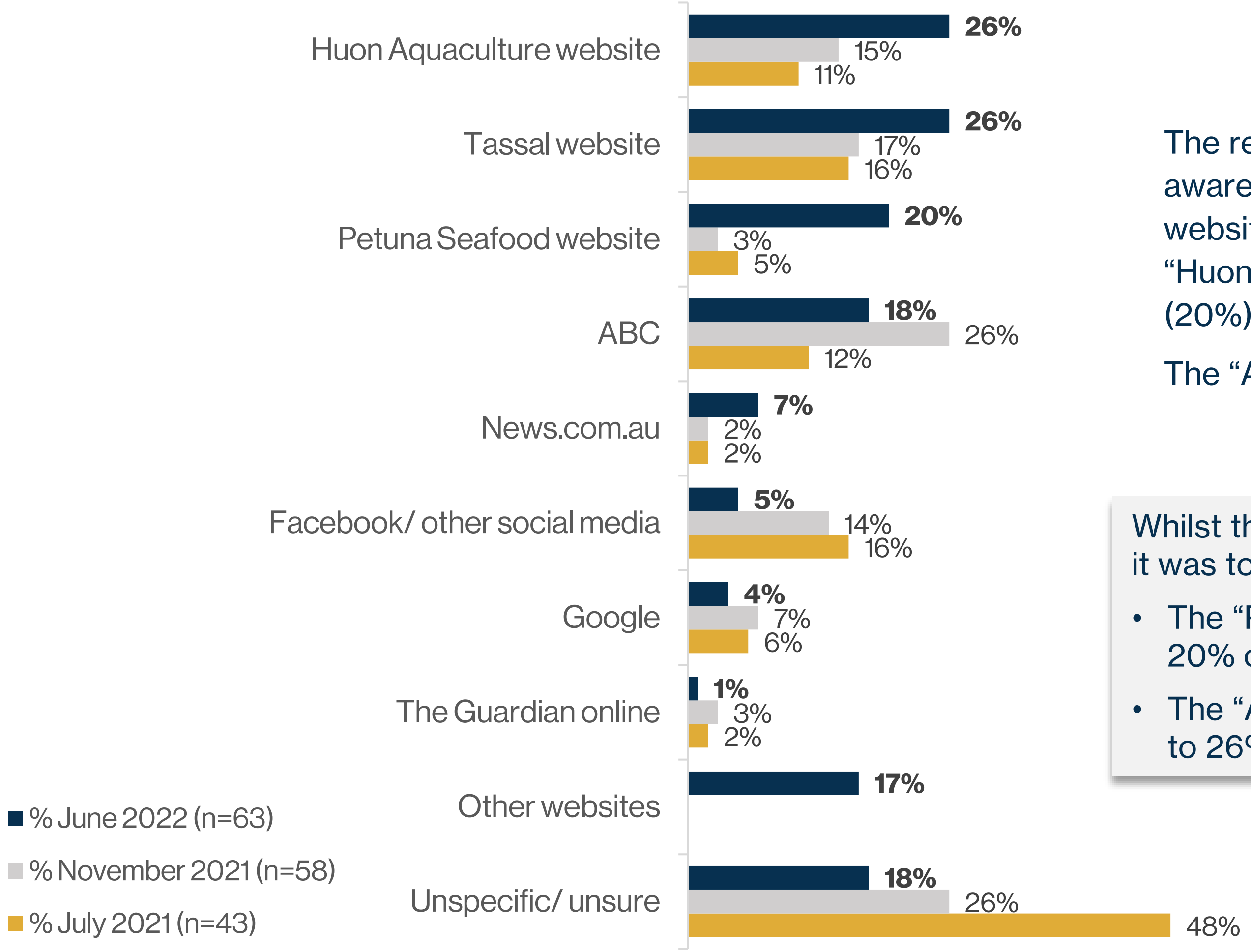
* Percentages do not sum to 100 due to multiple responses.

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

CHANNELS OF AWARENESS OF THE TASMANIAN SALMON FARMING INDUSTRY (2)

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 websites related to three of the state's salmon farming companies: namely, "Huon Aquaculture", "Tassal" (26% in each case), and "Petuna Seafood" (20%).

The "ABC" remained the most frequently cited news media website (18%).

Whilst the variations across the three research rounds were generally marginal, it was to be noted that in June 2022:

- The "Petuna Seafood website" was cited significantly more frequently (by 20% currently, compared to 3% in November 2021 and 5% in July 2021).
- The "ABC" was cited somewhat less frequently (by 18% currently, compared to 26% in November 2021).

* Percentages do not sum to 100 due to multiple responses.
† The results should be interpreted with a degree of caution due to the relatively small and varying sample sizes.

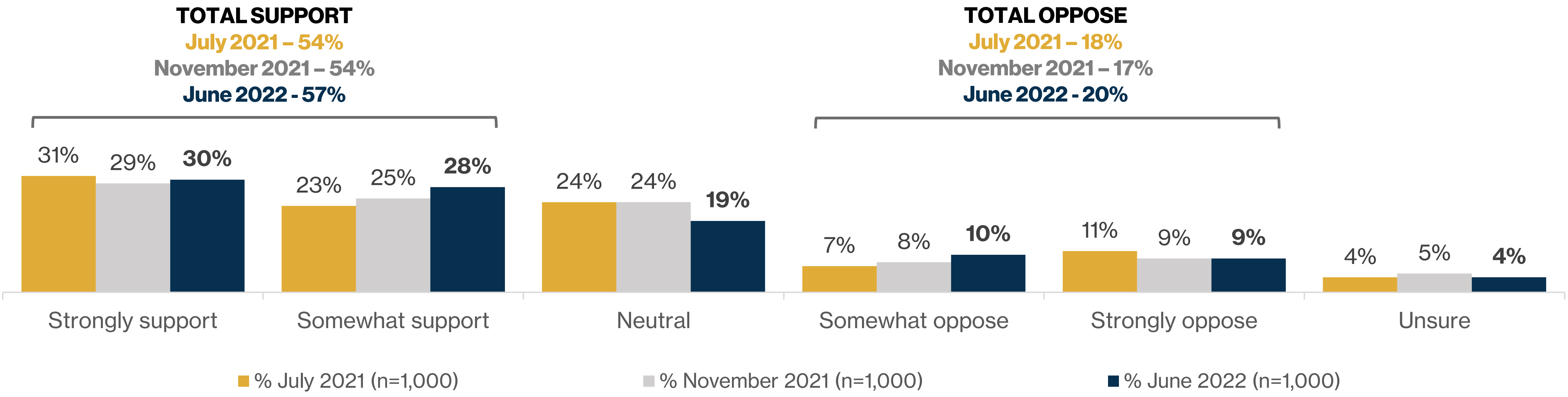
Q. Through which websites have you become aware of the industry?

Demographically, there were no significant findings to be noted.

LEVEL OF SUPPORT FOR THE TASMANIAN SALMON FARMING INDUSTRY

LEVEL OF SUPPORT FOR THE TASMANIAN SALMON FARMING INDUSTRY (1)

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



More than one half of all respondents in June 2022 stated that they supported the Tasmanian salmon farming industry to some degree (57% in total), with the level of support being divided relatively equally between "strong" (30%) and "somewhat" (28%).

A neutral view was held by 19%.

One in five stated that they were opposed to the industry to some degree (20% in total).

NET SUPPORT SCORE(†)

July 2021	November 2021	June 2022
+36	+37	+37

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

The positive Net Support Score for the Tasmanian salmon farming industry recorded in June 2022 (+37) showed no change from that established in November 2021 (+37) and little change from that in July 2021 (+36). The segmented results presented in Chart 7 also showed only marginal variations.

†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.

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.

LEVEL OF SUPPORT FOR THE TASMANIAN SALMON FARMING INDUSTRY (2)

Demographically:

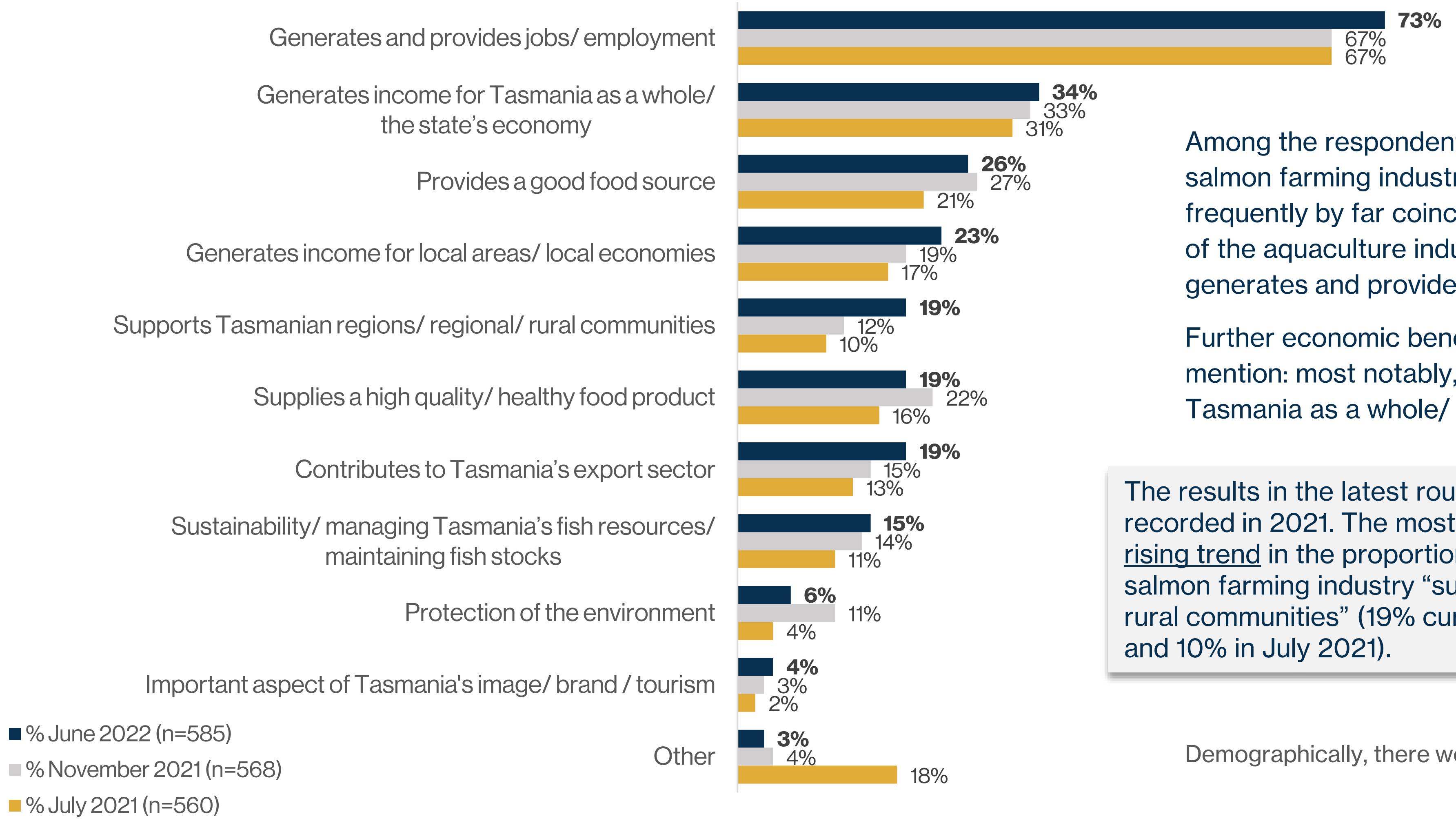
- Respondents aged 18 to 24 years were significantly <u>more likely</u> to state unsure (11%).
- Respondents aged 70 years and over were significantly <u>more likely</u> to state that they “strongly” support the industry (42%).
- Males were significantly <u>more likely</u> to be in support of the industry (67% in total, and 38% in “strong support”), than females (49% in total, 22% in “strong support”).
- Respondents in Hobart and the South-East were significantly <u>less likely</u> to state they “strongly” support the industry (24%).

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 "strongly" 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" (73%).

Further economic benefits also recorded high rates of mention: most notably, that it "generates income for Tasmania as a whole/ the state's economy" (34%).

The results in the latest round were generally in line with those recorded in 2021. The most notable variation was the steady rising trend in the proportion of respondents mentioning that the salmon farming industry "supports Tasmanian regions/ regional/ rural communities" (19% currently, up from 12% in November 2021 and 10% in July 2021).

Demographically, there were no significant findings to be noted.

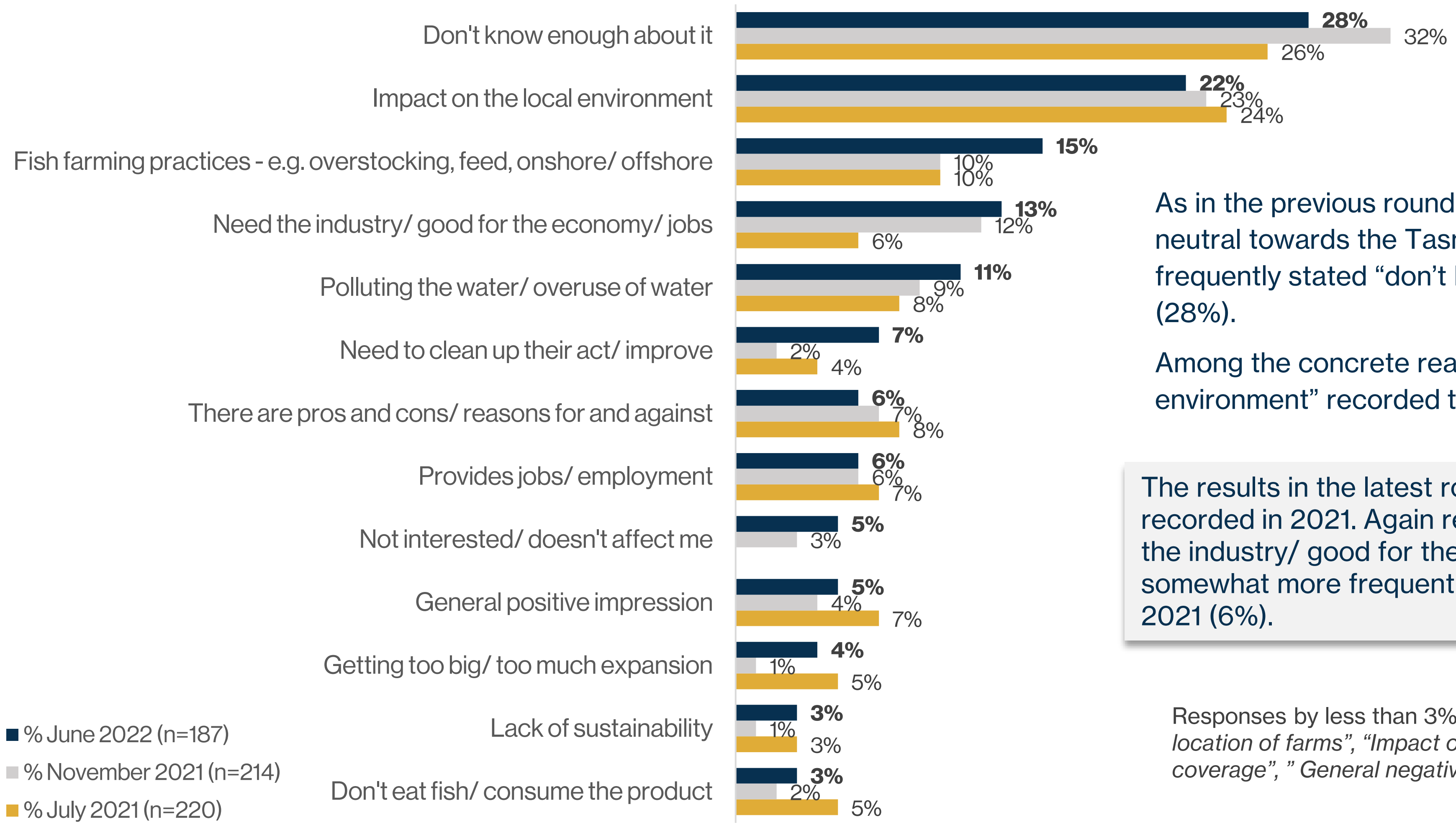
* Percentages do not sum to 100 due to multiple responses.

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

REASONS FOR A NEUTRAL POSITION ON THE SALMON FARMING INDUSTRY

Chart 9 – Reasons for a Neutral Position on the Salmon Farming Industry

(Percentage of respondents "neutral" in their position on the salmon farming industry)*



As in the previous rounds, the respondents who were currently neutral towards the Tasmanian salmon farming industry most frequently stated "don't know enough about it" as their reason (28%).

Among the concrete reasons provided, the "impact on the local environment" recorded the highest rate of mention (22%).

The results in the latest round were generally in line with those recorded in 2021. Again reflecting a focus on the economy, "need the industry/ good for the economy/ jobs" tended to be mentioned somewhat more frequently in June 2022 (13%), compared to July 2021 (6%).

Responses by less than 3%, not detailed in the chart, included: *"Don't like the location of farms", "Impact on recreational fishing", "Bad publicity/ media coverage", " General negative impression"* (1% in each case).

Demographically, there were no significant findings to be noted.

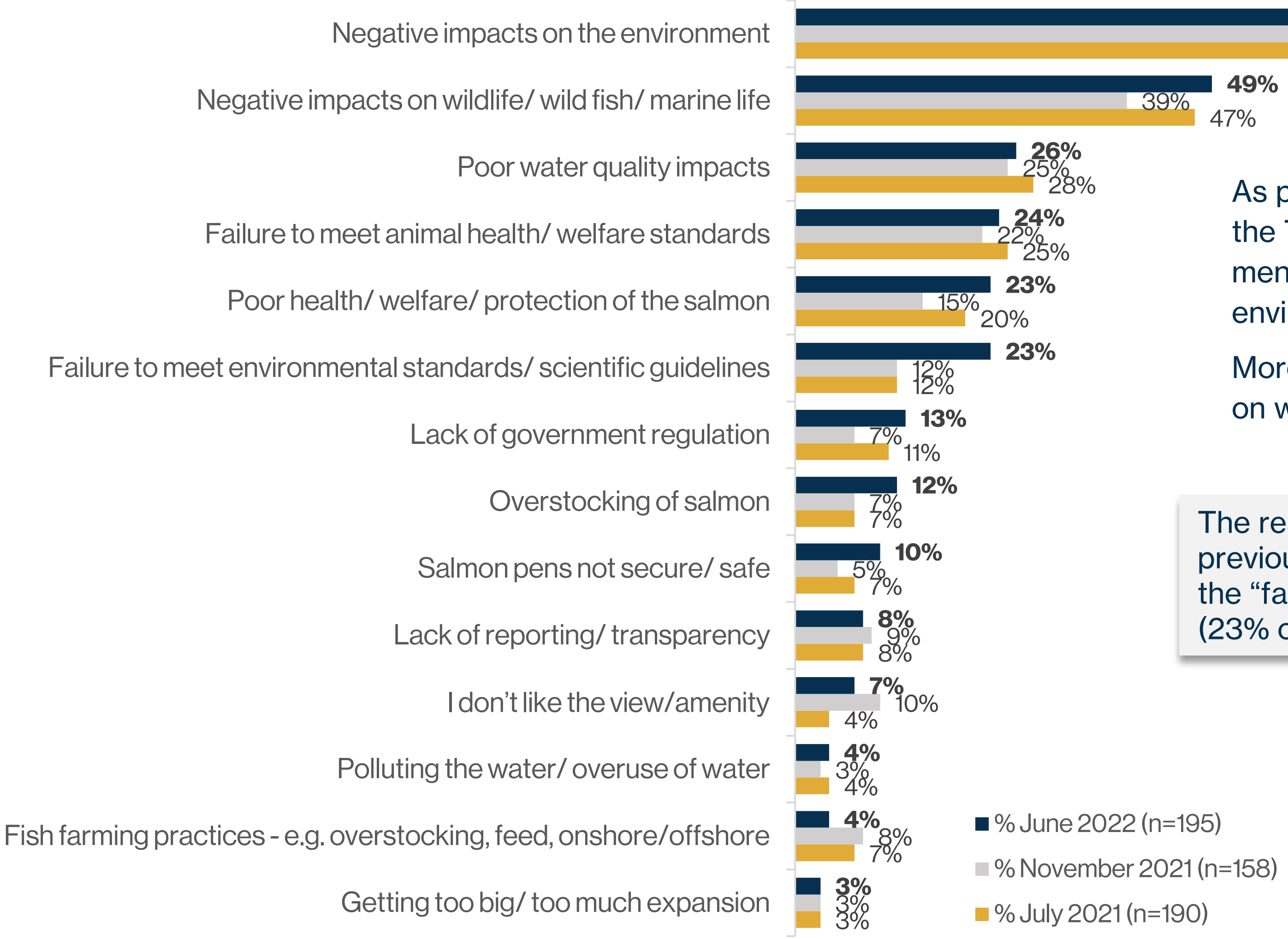
* Percentages do not sum to 100 due to multiple responses.

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 strongly" or "somewhat" in opposition to the salmon farming industry)*



As previously, among the respondents who currently opposed the Tasmanian salmon farming industry, the reason or concern mentioned most frequently by far was "negative impacts on the environment" (69%).

More specifically, close to one half cited the "negative impacts on wildlife/ wild fish/ marine life" (49%).

The results in the latest round were generally in line with those noted previously. One variation to emerge was the increase in mentions of the "failure to meet environmental standards/ scientific guidelines" (23% currently, up from 12% in both November 2021 and July 2021).

Responses by less than 3% of respondents, not detailed in the chart, included: *"Need to clean up their act/ improve", "Bad publicity/ media coverage", "Good for the economy/ jobs", "Lack of sustainability", "General negative impression", "Don't like the location of farms", "Unsure"* (1% in each case).

Demographically, there were no significant findings to be noted.

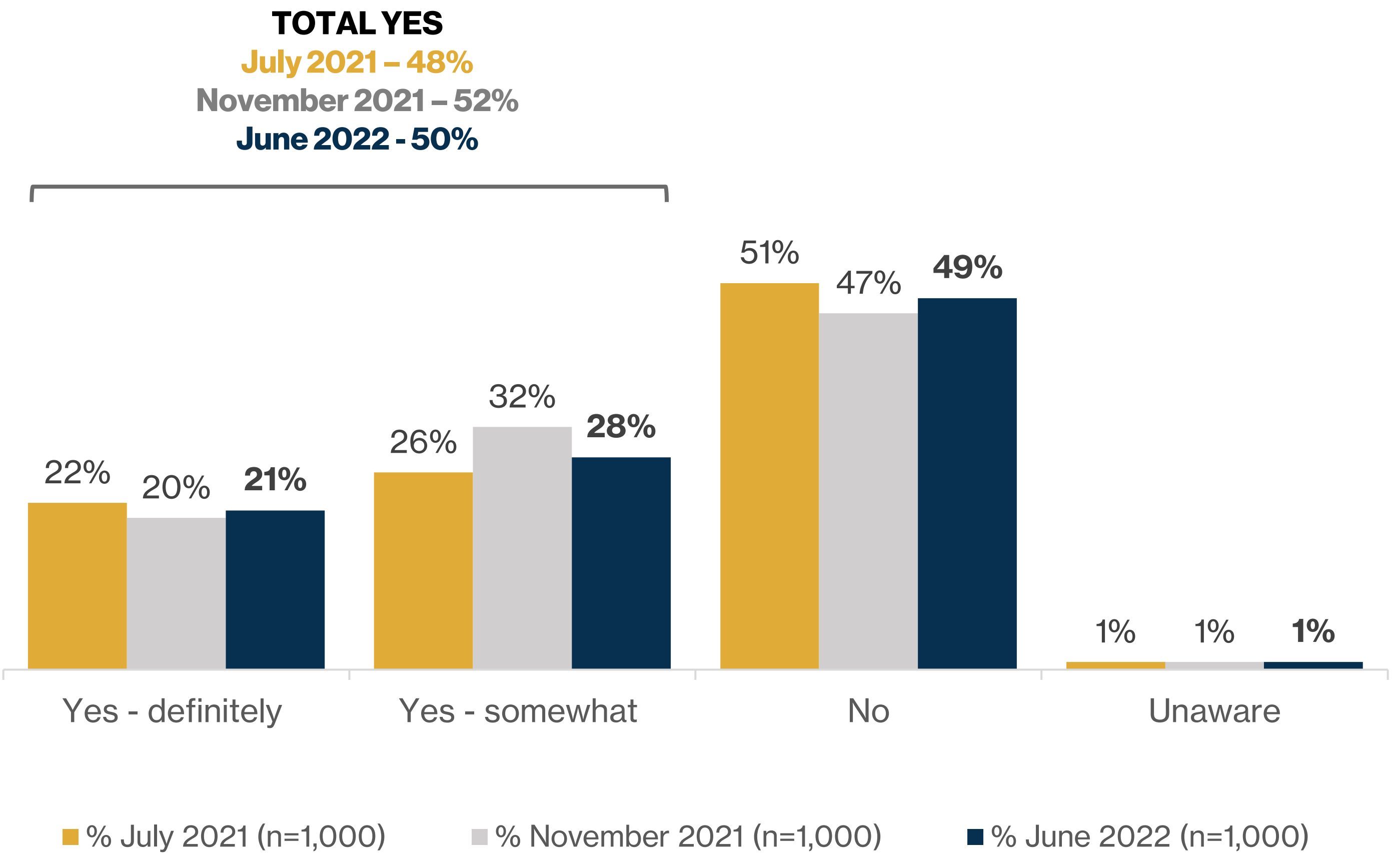
* Percentages do not sum to 100 due to multiple responses.

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

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 June 2022, one half of the full sample stated "yes", that they would want to know or understand more about the Tasmanian salmon farming industry (50% in total). Of these 21% said "yes – definitely".

The figures indicate that there is an ongoing call for more information.

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

Demographically, there were no significant findings to be noted.

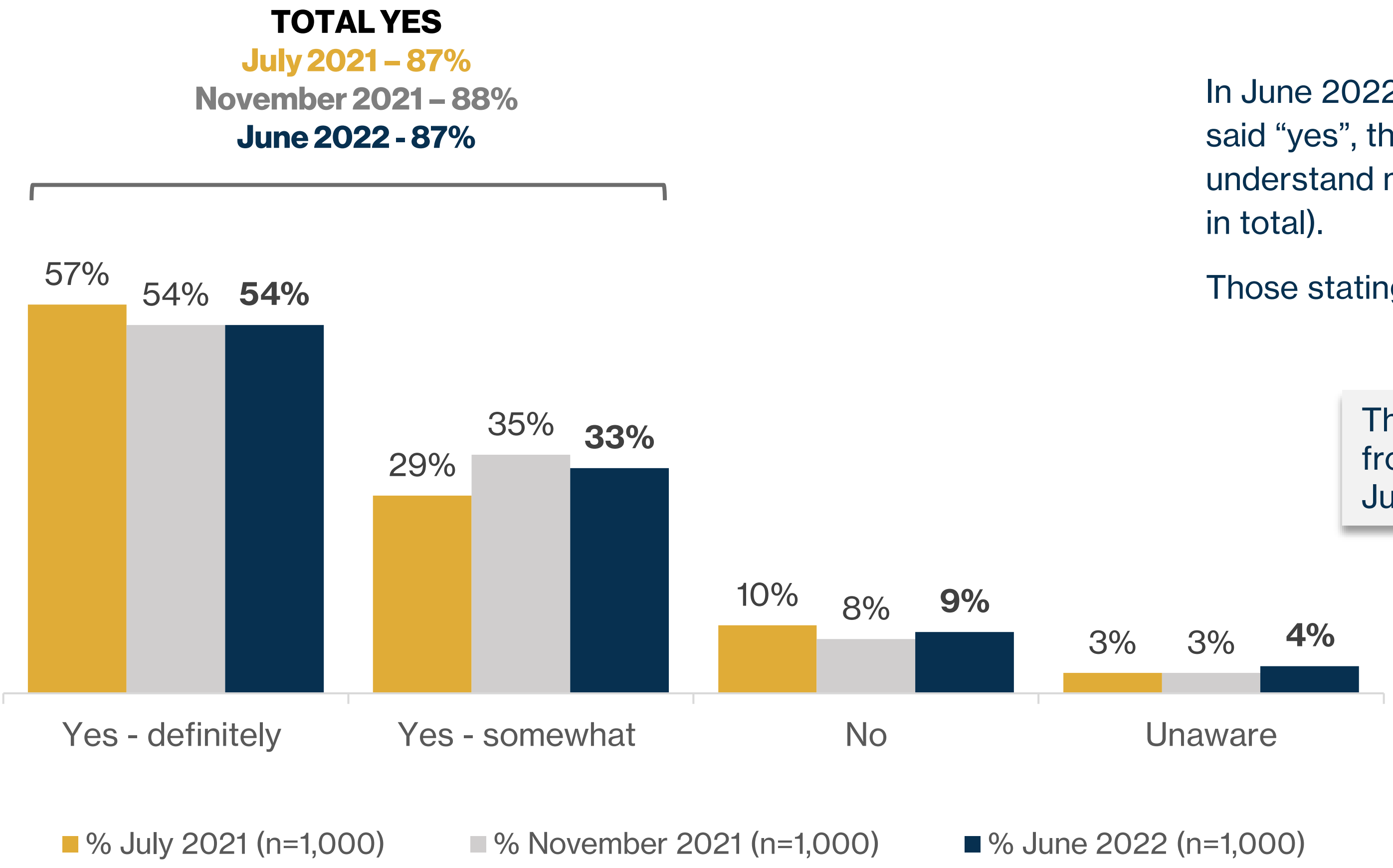
* Percentages may not sum to 100 due to rounding.

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 INDUSTRY

Chart 12 – Perception that the Public Needs More Information about the Salmon Farming Industry

(Percentage of all respondents)*



In June 2022, a significantly higher proportion of respondents again said "yes", that they thought the public in general needed to know or understand more about the Tasmanian salmon farming industry (87% in total).

Those stating "yes – definitely" were again in the clear majority (57%).

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

Demographically, there were no significant findings to be noted.

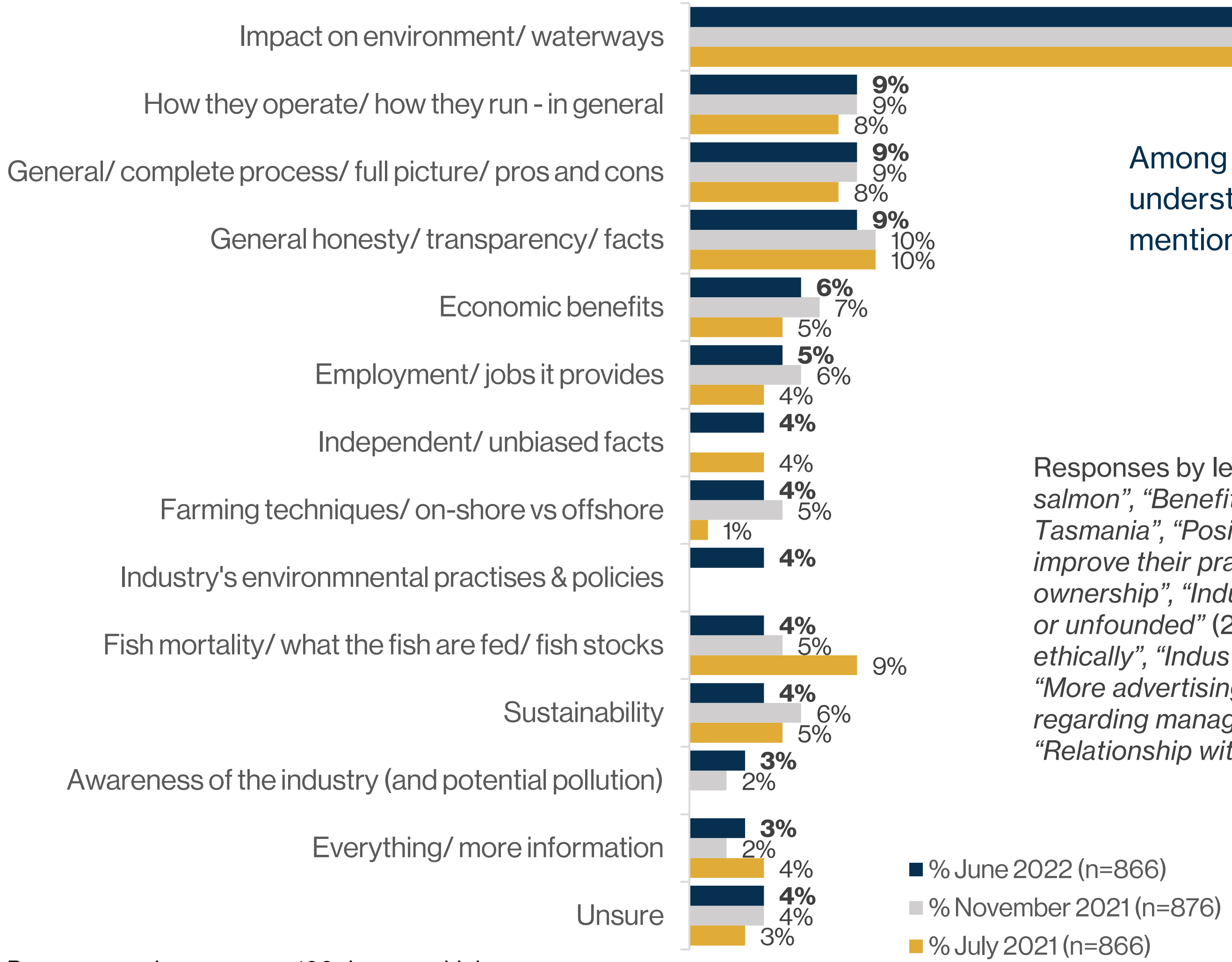
* Percentages may not sum to 100 due to rounding.

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)*



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” (35%).

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

Responses by less than 3%, not detailed in the chart, included: *“Health implications of consuming salmon”, “Benefits to Tasmania/ why it is needed”, “How much waste is produced”, “A major industry in Tasmania”, “Positives of the industry”, “Support of local community”, “How they can farm better/ improve their practices”, “Expansion plans/ future/ long-term plans”, “Concerns regarding the foreign ownership”, “Industry is compliant with standards and regulations”, “Farming concerns are exaggerated or unfounded”* (2% in each case); *“A safe product/ a quality product”, “Can be conducted cleanly/ ethically”, “Industry's negative image may be undeserved”, “Exports”, “Regulations/ how it's regulated”, “More advertising/ awareness/ information”, “Location considerations - current and future”, “Concerns regarding management or stakeholders”, “Awareness of where farmed salmon comes from”, “Relationship with Government/ assistance”* (1% in each case).

Demographically:

- Respondents aged 18 to 24 years were significantly more likely to cite information on the “awareness of the industry (and potential pollution)“ (13%).

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

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

BEST CHANNELS FOR PROVIDING INFORMATION ABOUT THE SALMON FARMING INDUSTRY

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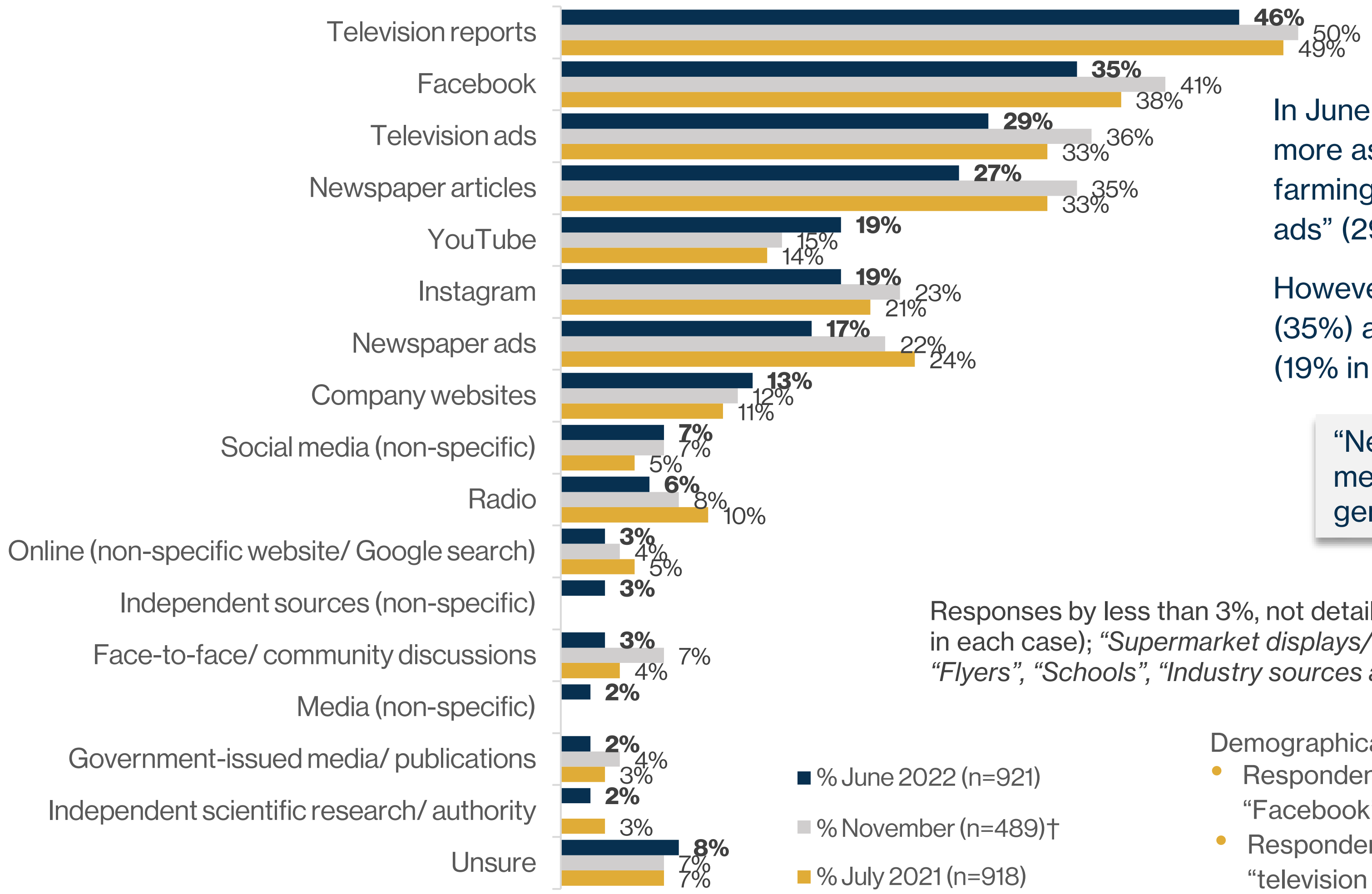
Chart 14 – Best Channels for Providing Information about the Salmon Farming Industry

(Percentage of respondents confirming they or the public need to know or understand more)*



In June 2022, traditional media recorded high rates of mention once more as the best channels for providing information on the salmon farming industry: most notably, "television reports" (46%), "television ads" (29%) and "newspaper articles" (27%).

However, a significantly large proportion again cited "Facebook" (35%) and, to a somewhat lesser degree, "YouTube" and "Instagram" (19% in each case).

"Newspaper ads" recorded a somewhat lower rate of mention, compared to the previous 2021 rounds, but generally there were no conclusive trends to emerge.

Responses by less than 3%, not detailed in the chart, included: *"Mail/ letterbox drops"*, *"Documentaries"* (2% in each case); *"Supermarket displays/ product packaging"*, *"Everything/ all of the above"*, *"Tours/ open days"*, *"Flyers"*, *"Schools"*, *"Industry sources and associates"*, *"TikTok"*, *"The ABC"* (1% in each case).

Demographically:

- Respondents aged 18 to 24 years were significantly <u>more likely</u> to nominate "Facebook" as the best channel (60%).
- Respondents aged 70 years or over were significantly <u>more likely</u> to nominate "television ads" and "newspaper ads" (41% and 28% respectively).

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

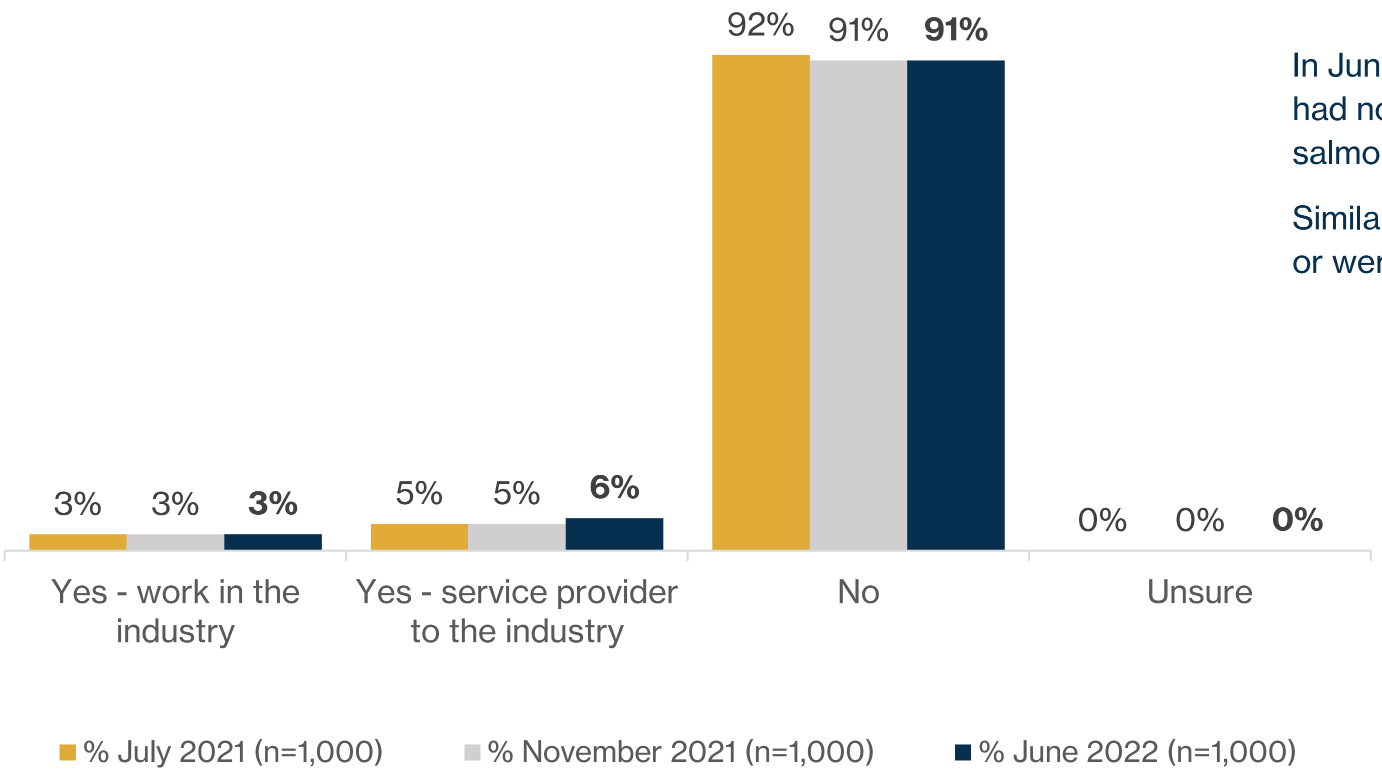
Q. Which channels do you think would be best for providing information on the Tasmanian salmon industry?

†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.

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)*



In June 2022, the great majority of respondents reported that "no", they had no direct experience of working in or being a service provider to the salmon farming industry (91%).

Similarly small samples confirmed that they worked in the industry (3%), or were service providers to the industry (6%).

The current results showed only marginal variations from those recorded previously in the November and July 2021 rounds.

Demographically:
- Female respondents were significantly more likely to report having no personal experience working in or as a service provider to the industry (95%, compared to 86% of males).

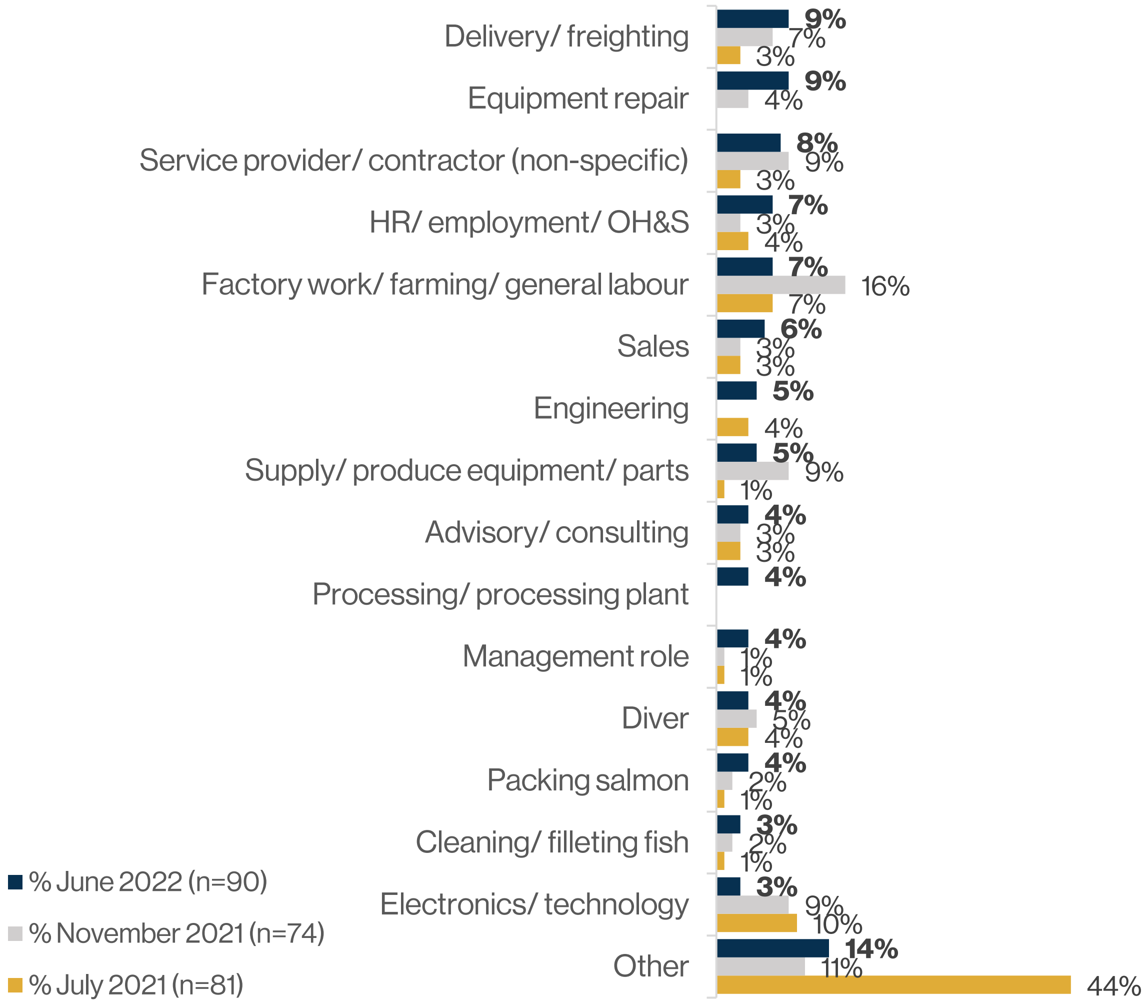
* Percentages do not sum to 100 due to multiple responses, except for "no" and "unsure" which were exclusive answers.

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/for the industry)*



In the latest round, 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 9% (n=8) or less.

The current results showed only marginal variations from those recorded previously in the November and July 2021 rounds.

Responses by less than 3%, not detailed in the chart, included: *"Declined to answer"* (2%); *"Tradesmanship - e.g. boiler maker, electrician", "Energy supplier", "Chef", "Regulating/ regulator"* (1% in each case).

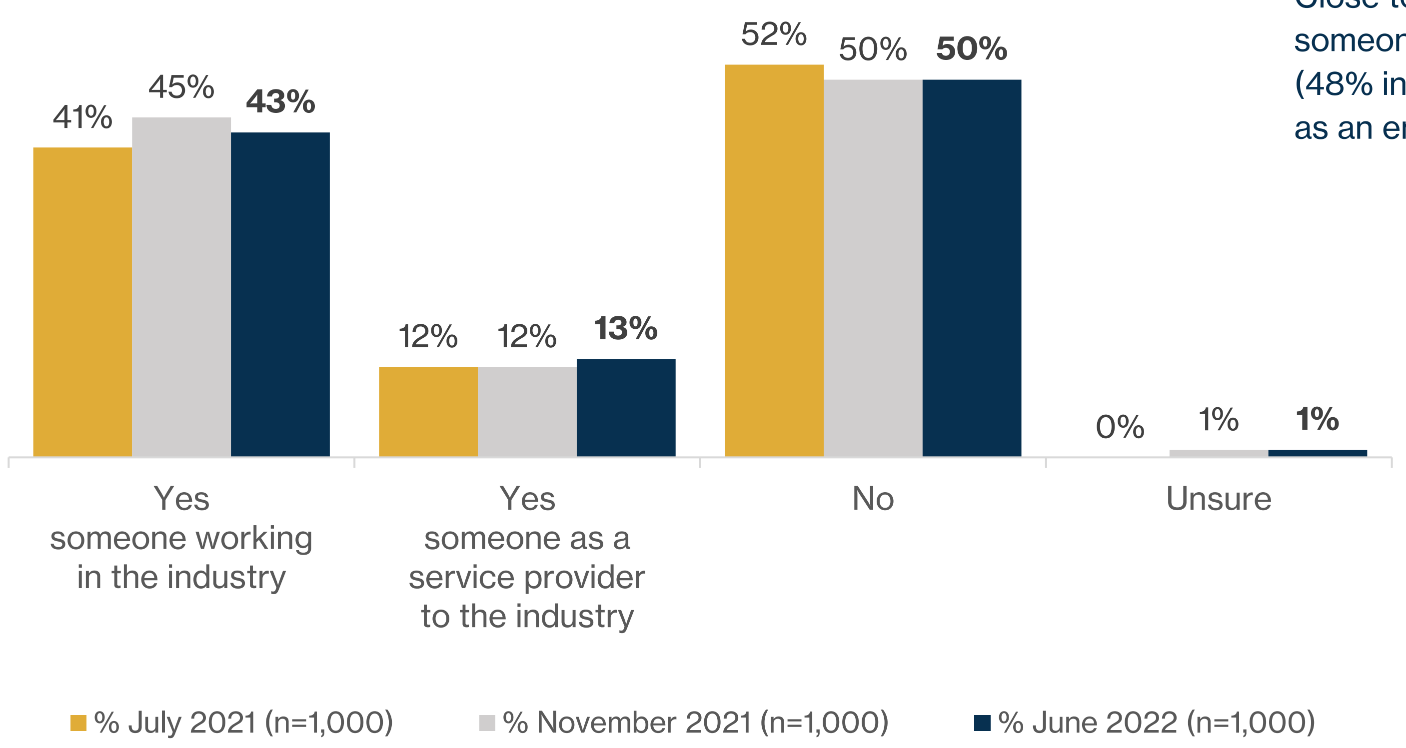
Demographically, there were no significant findings to be noted.

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

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)*



Close to one half of all respondents in June 2022 confirmed that they knew someone working in or as a service provider to the salmon farming industry (48% in total), highlighting the significant ongoing role it plays in Tasmania as an employer and contractor.

The latest June 2022 results remained virtually unchanged from those recorded previously in the November and July 2021 rounds.

Demographically:

- Respondents aged 35 to 44 years were significantly more likely to know someone with links to the industry (63% in total).
- Respondents in Launceston and the North-East were significantly less likely to know someone with links to the industry (39% in total), compared to those in Hobart and the South-East and in the West and North-West (51% and 53% respectively).

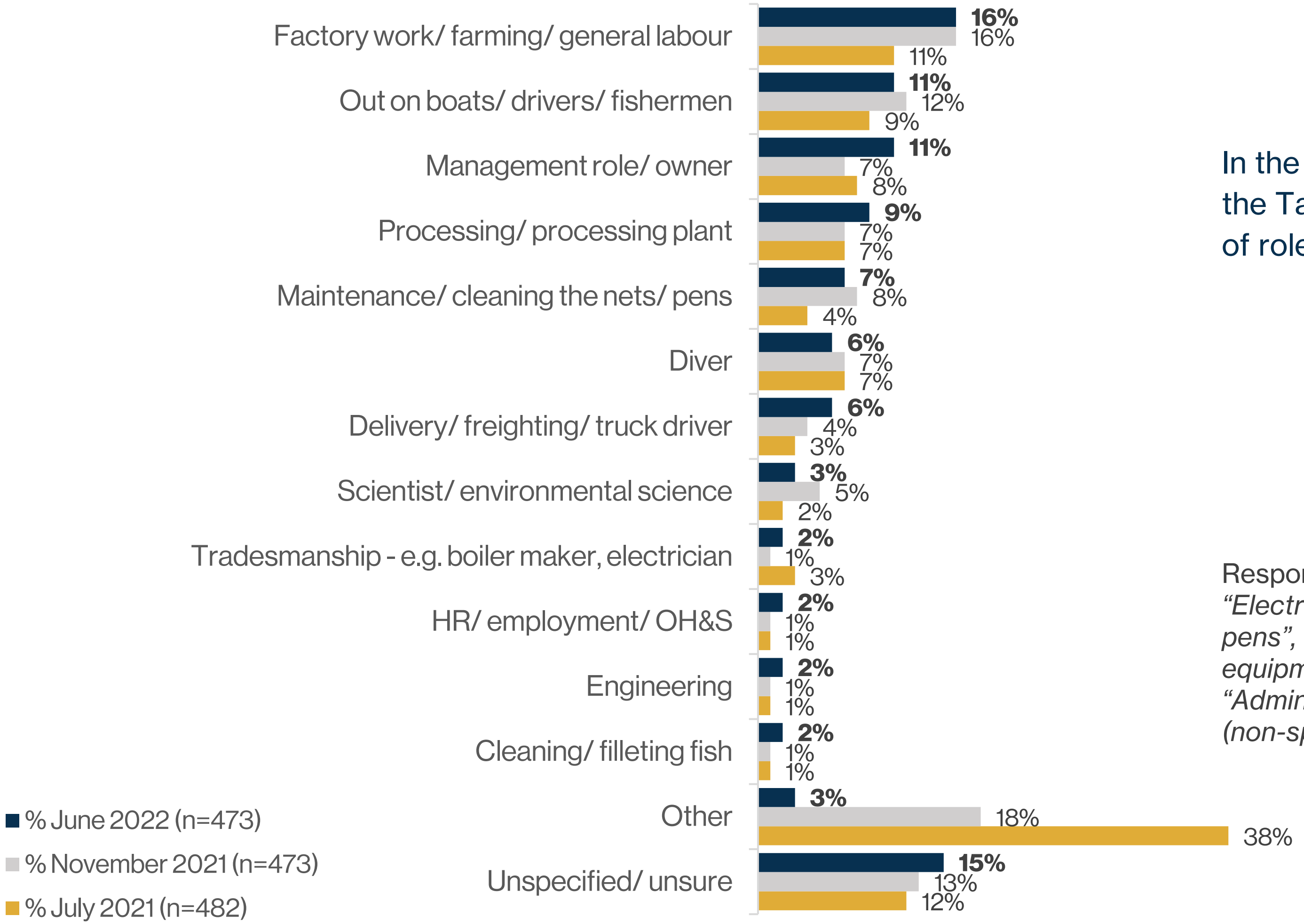
* Percentages do not sum to 100 due to multiple responses, except for "no" and "unsure" which were exclusive answers.

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/for the industry)*



In the latest round, 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 samples of 16% or less.

The current results showed only marginal variations from those recorded previously in the November and July 2021 rounds.

Responses by less than 2%, not detailed in the chart, included: *"Aquaculturalist", "Electronics/ technology", "Quality control/ assessment", "Building/ supplier of pens", "Supply/ produce equipment/ parts", "Advertising/ marketing", "Repaired equipment", "Feed production/ supplier", "Breeding/ hatchery", "Packing salmon", "Administration/ office work", "Advisory/ consulting", "Service provider/ contractor (non-specific)"* (1% in each case).

Demographically, there were no significant findings to be noted.

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

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

IMPORTANCE RANKING OF SPECIFIED ELEMENTS OF THE TASMANIAN SALMON FARMING INDUSTRY

IMPORTANCE RANKING OF SPECIFIED ELEMENTS OF THE TASMANIAN SALMON FARMING INDUSTRY (1)

Table 1 – Importance Ranking of Specified Elements of the Tasmanian Salmon Farming Industry*

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		
	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**
Maintain high animal health and welfare standards	94	93	**92↑**	81	81	**82↑**	13	12	**10↓**	2	4	**4↓**	2	1	**3↓**	1	1	**2↓**	2	0	**1↓**
Protect the natural environment and wildlife	93	92	**91↑**	81	80	**81↑**	12	11	**11↓**	3	5	**5↓**	3	2	**3↓**	1	1	**1↓**	2	1	**2**
Provide a high quality, healthy food product	93	92	**91↑**	81	79	**77↑**	12	14	**14↓**	3	4	**4↓**	3	3	**3↓**	1	1	**2↓**	2	2	**2**
Public transparency and reporting on its operations	88	88	**87↑**	69	69	**70↑**	20	20	**17**	8	8	**8**	3	3	**3↓**	1	2	**2↓**	2	1	**1↓**
Maintain sustainable fish stocks	87	87	**86↑**	70	66	**70↑**	17	21	**16↓**	5	7	**6↓**	5	3	**4↓**	2	1	**2↓**	3	2	**2**

* Percentages may not sum to 100 due to rounding, and “unsure” responses being excluded from the table.

† The arrows indicate higher or lower column percentage figures of statistical significance on comparing the ranking of the statements. They do not indicate significant variations across the research rounds.

The responses in June 2022 were closely in line with those recorded previously in the November and July 2021 rounds.

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 TASMANIAN SALMON FARMING INDUSTRY (2)

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Table 1 (cont'd) – Importance Ranking of Specified Elements of the Tasmanian Salmon Farming Industry*†

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		
	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**	Jul. 2021	Nov. 2021	**Jun. 2022**
Generate income for the local economy	84	84	**83**	62	58	**59**	22	26	**24↑**	10	11	**11**	5	4	**5**	3	3	**3**	2	2	**2**
Generate and provide training, jobs and employment	84	84	**83**	61	58	**59**	22	26	**24↑**	11	11	**10**	5	4	**6**	3	3	**4**	2	1	**2**
Support Tasmania's regions and regional communities	79	80	**76↓**	52	51	**51↓**	27	29	**26↑**	12	14	**14**	7	5	**8**	3	3	**5**	4	2	**3**
Support of local community events and groups	60	58	**57↓**	31	31	**29↓**	29	27	**28↑**	25	26	**24↑**	13	14	**16↑**	7	8	**12↑**	6	6	**5↑**
Community sponsorships and partnerships	56	51	**53↓**	27	27	**26↓**	28	23	**27↑**	26	31	**27↑**	15	15	**17↑**	9	9	**10↑**	6	6	**6↑**

* Percentages may not sum to 100 due to rounding, and "unsure" responses being excluded from the table.
† The arrows indicate higher or lower column percentage figures of statistical significance on comparing the ranking of the statements. They do not indicate significant variations across the research rounds.

The responses in June 2022 were closely in line with those recorded previously in the November and July 2021 rounds.

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 TASMANIAN SALMON FARMING INDUSTRY (3)

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The suggested ways for the Tasmanian salmon farming industry to contribute and engage that recorded the highest total levels of perceived importance, with top scores of “4” or “5” in June 2022, included:

- **Maintain high animal health and welfare standards** (92% in total, 82% a top score of “5”)
- **Protect the natural environment and wildlife** (91% in total, 81% a top score of “5”)
- **Provide a high quality, healthy food product** (91% in total, 77% a top score of “5”)
- **Public transparency and reporting on its operations** (87% in total, 70% a top score of “5”)
- **Maintain sustainable fish stocks** (86% in total, 70% a top score of “5”)

The two elements that recorded the lowest total levels of perceived importance in June 2022, with top scores of “4” or “5”, were:

- **Support of local community events and groups** (57% in total, 29% a top score of “5”)
- **Community sponsorships and partnerships** (53% in total, 26% a top score of “5”)

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

Demographically:

- Respondents aged 70 years or over were significantly more likely to rate the industry **supporting Tasmania’s regions and regional communities** as “very important” (62%).
- Respondents in the West and North-West were significantly more likely to rate the industry **generating and providing training, jobs and employment** as important at some level (91% in total, 66% of whom stated “very important”).

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”.