Tasmanian Salmonid Growers Association

Community Sentiment Tracking Research

Track 4 – 2022

Research Report

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 2021-2023 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 and Track 3 in May 2022. This latest Track 4 was conducted by EMRS in January 2023.

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;
- Determine the consumption level of Tasmanian salmon;
- Explore the main reason for not eating Tasmanian salmon;
- Determine the level of importance placed on the Tasmanian aquaculture industry to the state's economy;
- Explore the perceptions of politicians who support the Tasmanian salmon farming industry; and
- Determine any shifts in the above by comparing the results of this research with those of Tracks 1, 2, and 3 in 2021 and 2022.

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 Track 4 research round was conducted between the 20th and the 31st of January 2023, with a total of n=1,000 respondents being successfully surveyed.

The target population was based on 446,261 Tasmanian residents aged 18 years and over (ABS, 2021). 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.

The survey was implemented according to ISO 20252:2019 standards.

Note on the Reporting

The following report presents the full results of all four 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
QUOTAS AND WEIGHTING

Quotas

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.

Weighting

As the collected data set seldom mirrors the exact age/ gender/ regional distribution, in order to correct for this, the following weightings were applied:

Age	Unweighted %*	Number	Weighted %*	Weights applied
18 to 24 years	5%	54	10%	1.8
25 to 34 years	10%	102	17%	1.7
35 to 44 years	10%	102	15%	1.4
45 to 54 years	21%	213	16%	0.7
55 to 69 years	30%	300	25%	0.8
70 years or over	23%	229	18%	0.8

Gender	Unweighted %	Number	Weighted %	Weights applied
Male	48%	482	49%	1.0
Female	52%	518	51%	1.0

Region	Unweighted %	Number	Weighted %	Weights applied
Hobart & South East	54%	535	52%	1.0
Launceston & North East	25%	252	27%	1.1
West & North West	21%	213	21%	1.0

TOTAL RESPONDENTS	**100%**	**1,000**	**100%**	–

*Percentages may not sum to 100 due to rounding.

INTRODUCTION
SUMMARY OF THE SAMPLE PROFILE

From the 20th to the 31st of January 2023, a total of n=1,000 adult Tasmanians were surveyed. The following table provides a summary of the demographic subgroups.

Gender	**%**	**Number**
Male	48%	482
Female	52%	518
Age	**%***	**Number**
18 to 24 years	5%	54
25 to 34 years	10%	102
35 to 44 years	10%	102
45 to 54 years	21%	213
55 to 69 years	30%	300
70 years or over	23%	229
Region	**%**	**Number**
South	54%	535
North	25%	252
North West	21%	213
TOTAL RESPONDENTS	**100%**	**1,000**

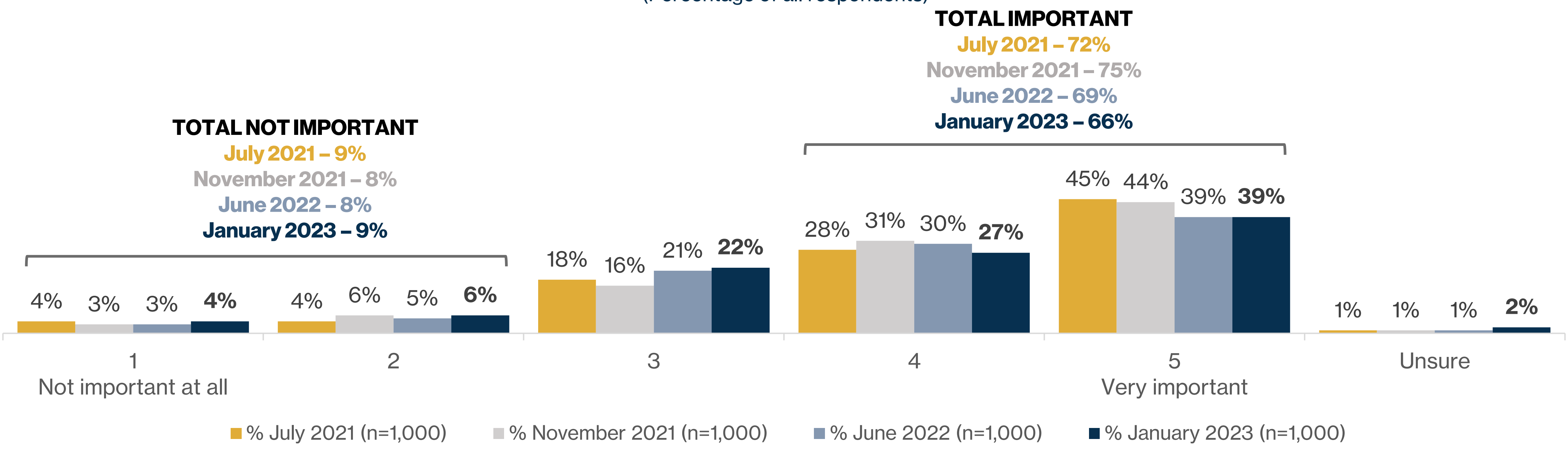
NOTE: Numbers and percentages here are unweighted. Elsewhere in the report, the percentage figures have been weighted to reflect the demographic profile of the target population.
*The percentage figures here do not sum to 100 due to rounding.

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 66% 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	January 2023
+64	+67	+61	+57

A Net Importance Score of +57 is classified as "excellent".

The high level of importance attributed to the Tasmanian aquaculture industry that was established in July 2021 (+64), November 2021 (+67), and June 2022 (+61) was again affirmed in the latest round (+57).

WHY THE AQUACULTURE INDUSTRY IS IMPORTANT TO TASMANIA

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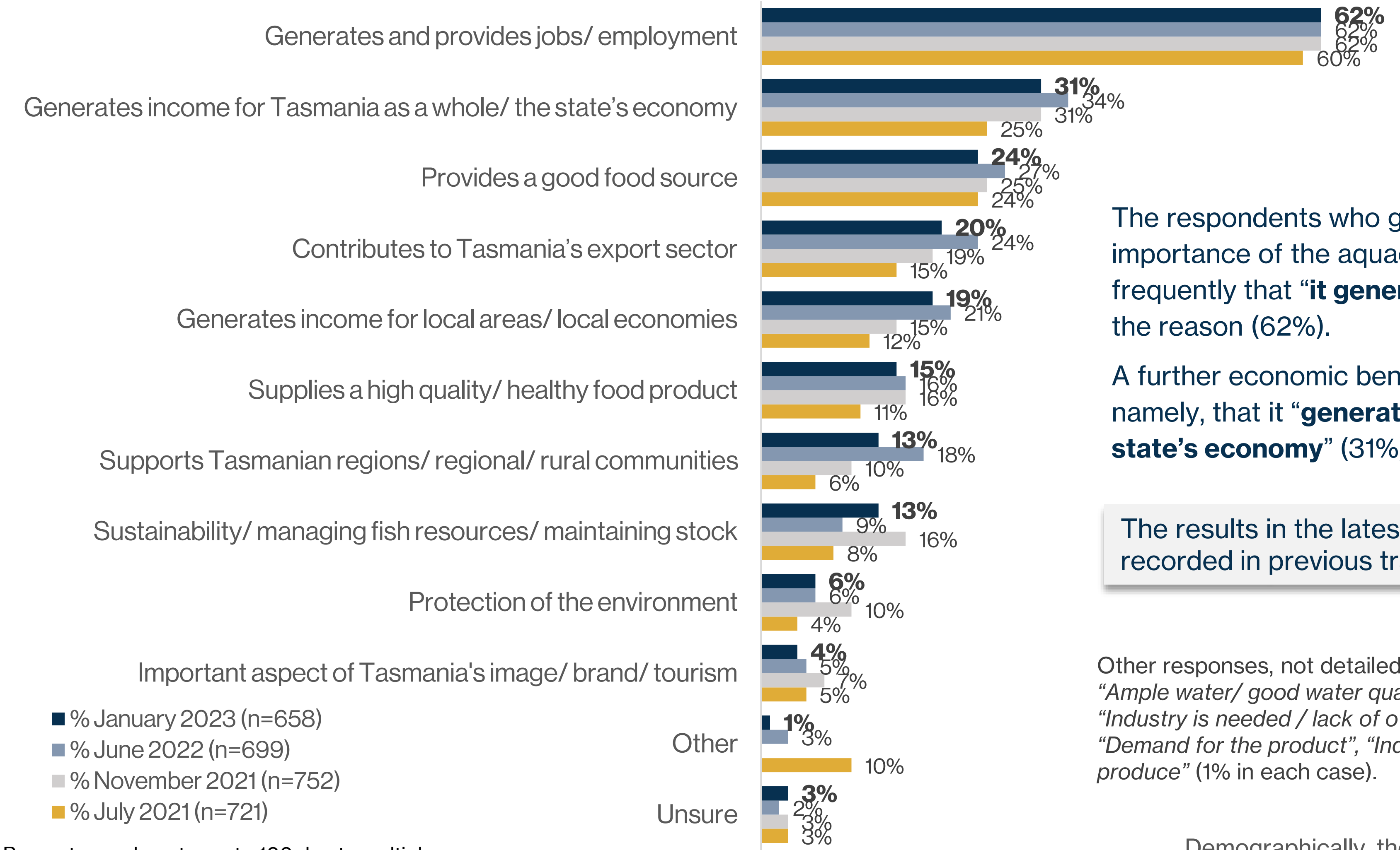
Chart 2 – Why the Aquaculture Industry is Important to Tasmania

(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**” (31%).

The results in the latest round were generally in line with those recorded in previous tracking rounds.

Other responses, not detailed in the chart, included: *“Tasmania relies on aquaculture”, “Ample water/ good water quality”, ” Support in general”, “Research/ education”, “Industry is needed / lack of other industries”, “A leading industry / good reputation”, “Demand for the product”, “Industry well-suited to Tasmania (island/ climate)”, “Local produce”* (1% in each case).

Demographically, there were no significant findings to be noted.

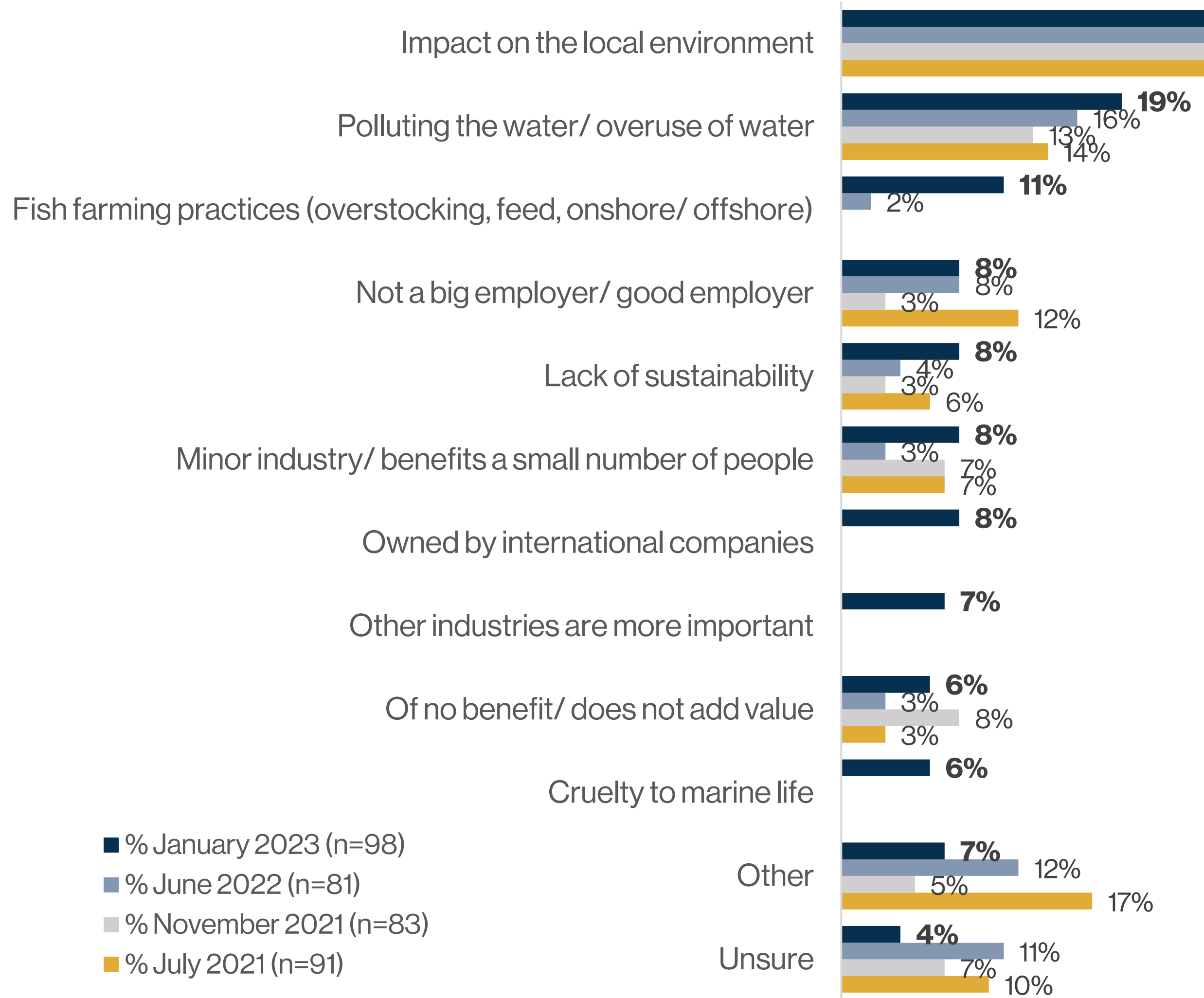
* Percentages do not sum to 100 due to multiple responses.

Q. Why is the aquaculture industry important to Tasmania?

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")*



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

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

Among the smaller sample of respondents (n=98) who ranked the Tasmanian aquaculture industry at the lowest importance scores of "1" or "2", the reason they mentioned most often was still its "**impact on the local environment**" (38%).

A more specific environmental aspect was cited next most frequently: namely, it "**polluting the water/ overuse of water**" (19%).

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 "**fish farming practices (overstocking, feed, onshore/ offshore)**" (11% currently, up from 2% in June 2022).

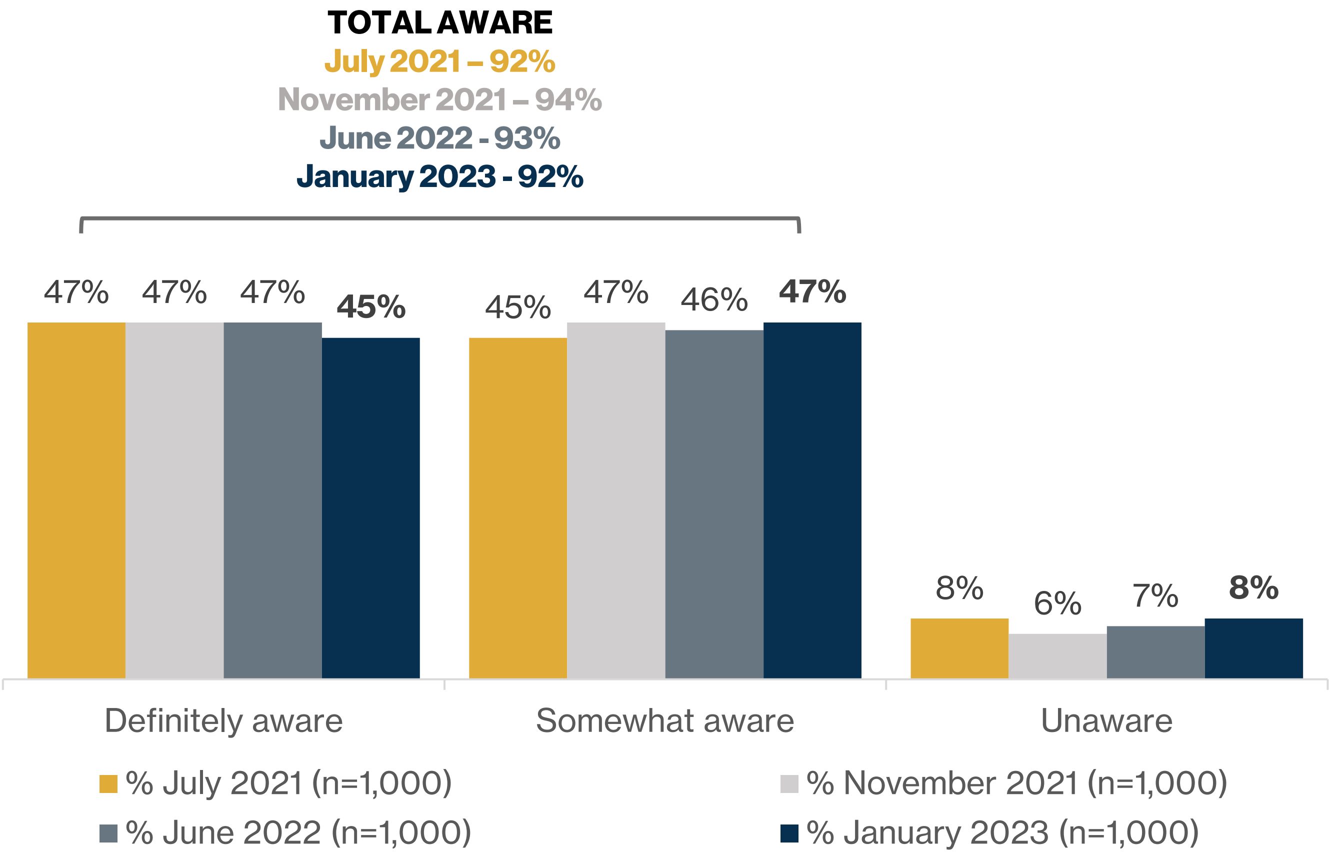
Responses by less than 6%, not detailed in the chart, included: "*Effect on Tasmanian image/ tourism*" (4%),"*Does more harm than good*", "*Dishonesty in management/ not transparent*", "*Low-quality product*", "*Too many fish farms*" (3% in each case); "*Impact on resources*", "*Noise pollution*" (2% in each case); " *Only interested in business and profits*" (1%).

Demographically, there were no significant findings to be noted.

AWARENESS OF THE TASMANIAN SALMON FARMING INDUSTRY

AWARENESS OF THE TASMANIAN SALMON FARMING INDUSTRY

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



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

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

A relatively small proportion said they were "**unaware**" (8%).

The latest January 2023 results closely mirrored those recorded in the previous rounds.

Demographically:

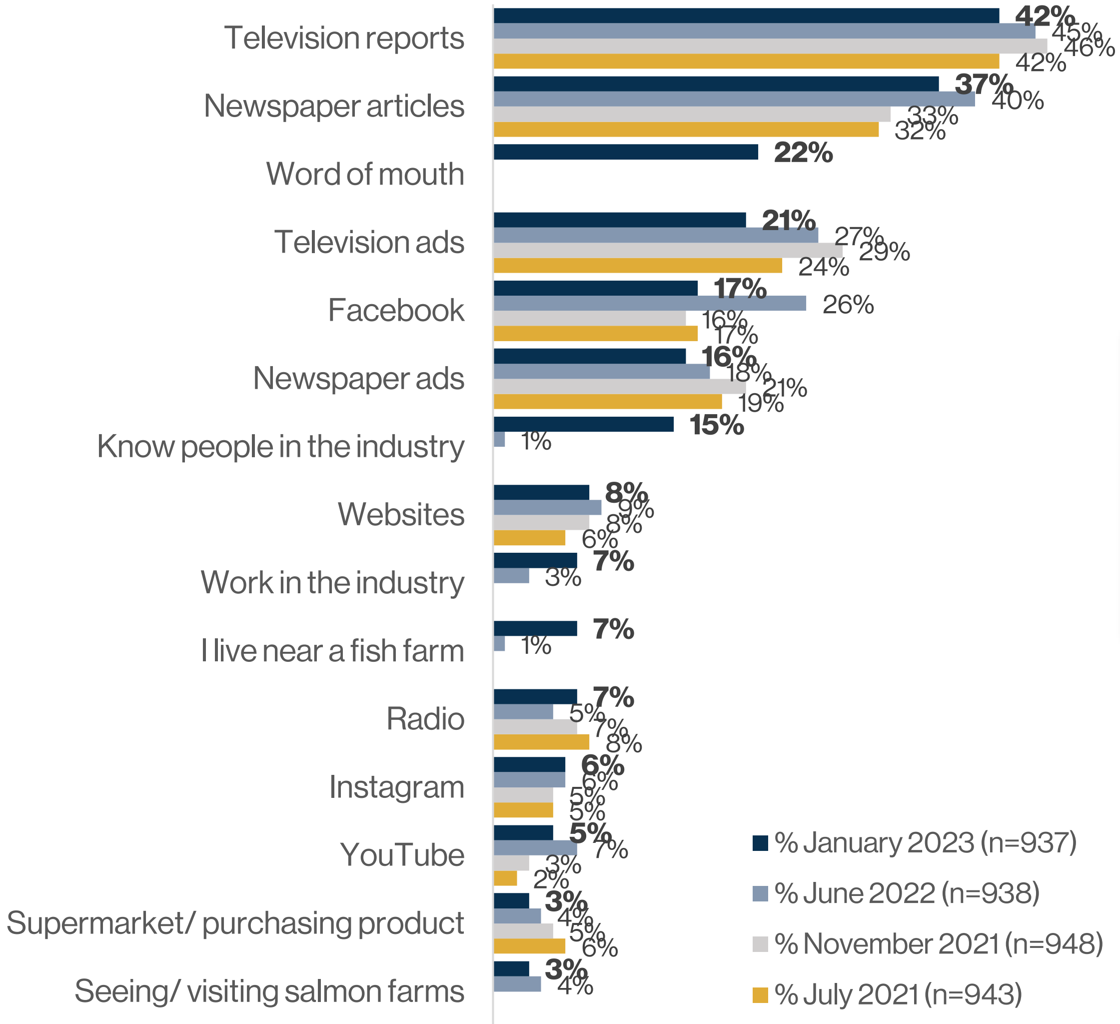
- Respondents aged 18 to 34 years were significantly more likely to be "**unaware**" of the Tasmanian salmon farming industry (18%) compared to their older counterparts aged 55 years or over, who were significantly more likely to be "**definitely aware**" (55%).
- Respondents in Hobart and the South East were somewhat more likely to say "**definitely aware**" (49%), when compared to those in Launceston and the North East (36%).

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**" (42%) and "**newspaper articles**" (37%) as the channels of their awareness.

A significant proportion of around one in five cited "**word of mouth**" and "**television ads**" (22% and 21% respectively).

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 "**word of mouth**" (22%) and "**know people in the industry**" (15% currently, up from 1% in June 2022).

On the other hand, the proportion of respondents citing "**Facebook**" fell back to the initial levels recorded in 2021 (17% currently, a drop from 26% in June 2022).

Responses by less than 3%, not detailed in the chart, included: *"Book/s", "Snapchat", "Traveling/ tourism", "School / university", "Online/ internet (general)" , "Employer does business with the industry", "Social media (non-specific)"* (2% in each case); *"Always known/ local knowledge", "Own research", "Boating/ sailing", "I am involved in recreational/ commercial fishing", "Other", "Unsure"* (1% in each case).

Demographically:

- Respondents aged 25 to 34 years were significantly more likely to report "**Instagram**" (17%) and "**YouTube**" (13%), while the older cohort aged 55 years or over were significantly more likely to say "**Newspaper articles**" (49%).

* 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)

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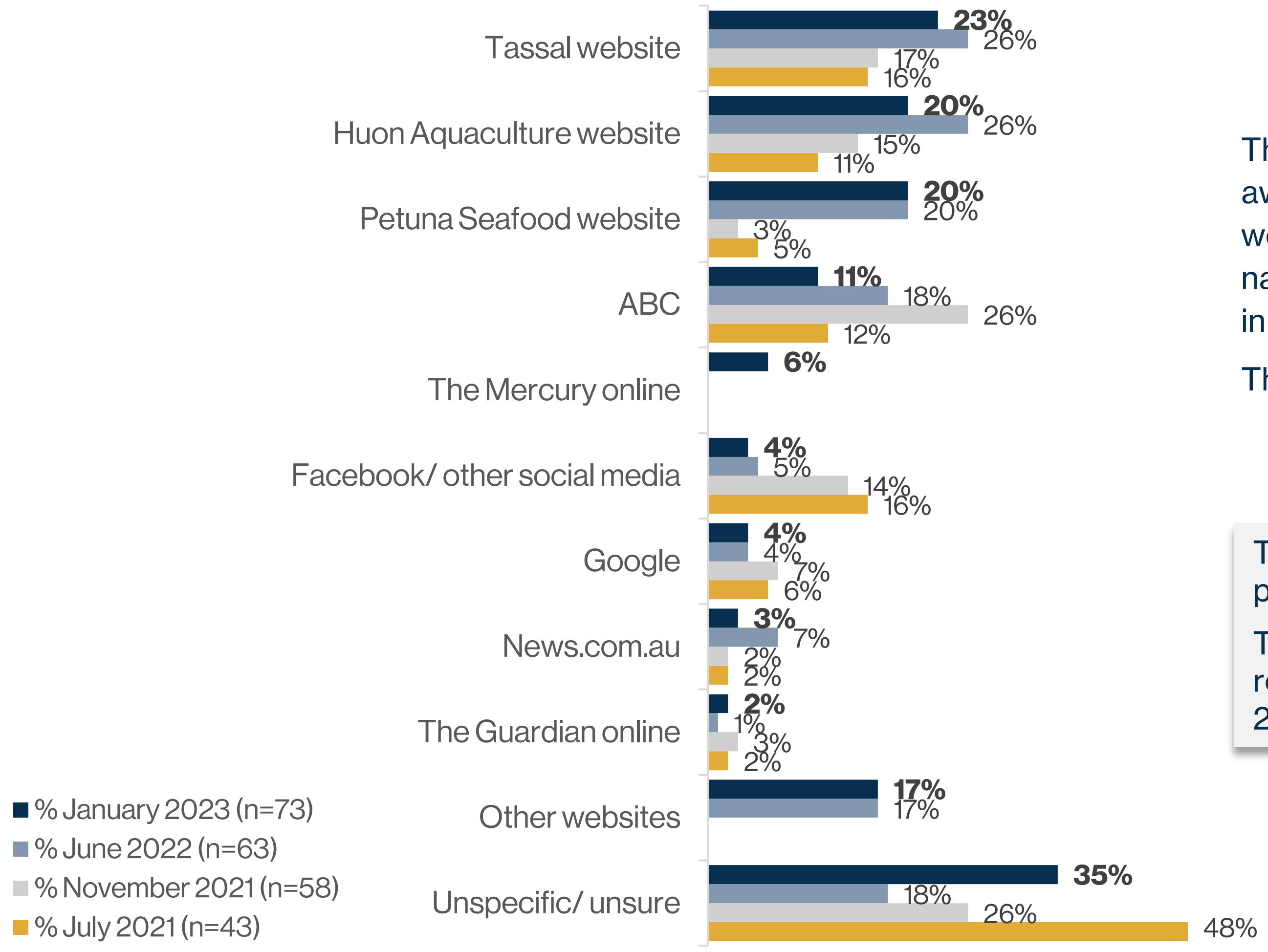
Chart 6 – Channels of Awareness of the Salmon Farming Industry – Specific Websites

(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, "**Tassal**" (23%), "**Huon Aquaculture**" and "**Petuna Seafood**" (20% in each case).

The "**ABC**" remained the most frequently cited news media website (11%).

The results in the latest round were generally in line with those recorded previously in June 2022.

The most notable variation was the decline in the proportion of respondents citing the "**ABC**" (11% currently, down from 18% in June 2022 and 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?

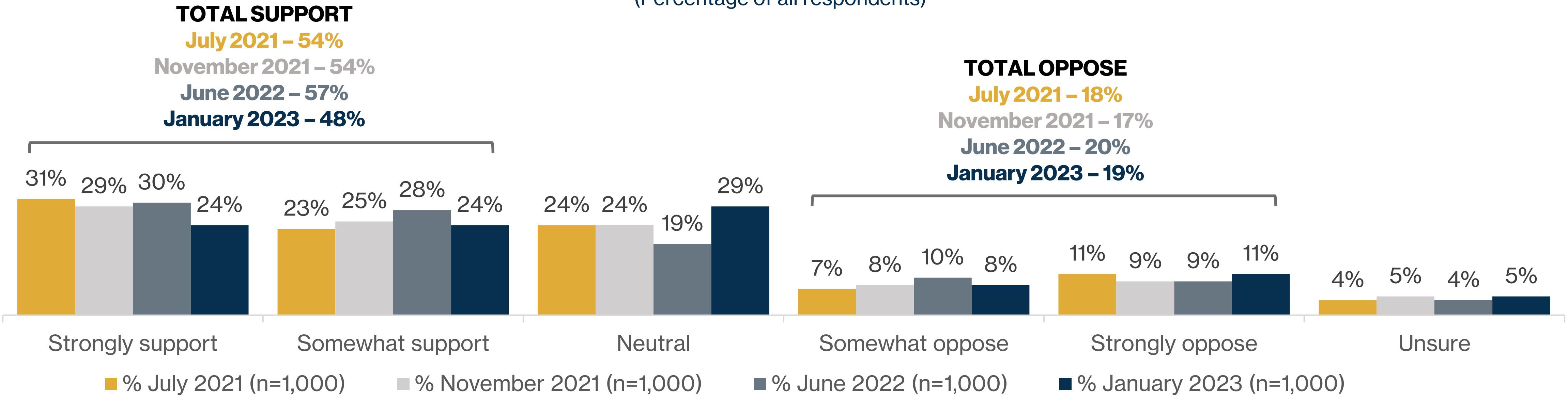
Demographically, there were no significant findings to be noted.

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)*



In January 2023, the proportion of respondents stating they **supported** the Tasmanian salmon farming industry to some degree was 48% in total, a significant decrease from 57% in June 2022, with the level of support currently being divided equally between "**strong**" and "**somewhat**" (24% in each case).

A **neutral** view was held by 29%, significantly up from 19% in June 2022.

Close to one in five stated that they were **opposed** to the industry to some degree (19% in total).

[†]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.

* Percentages do not sum to 100 due to rounding.

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.

NET SUPPORT SCORE[†]

July 2021	November 2021	June 2022	January 2023
+36	+37	+37	+29

A Net Support Score of +29 is classified as "good".

The positive Net Support Score for the Tasmanian salmon farming industry recorded in January 2023 (+29) somewhat decreased from those established in previous rounds.

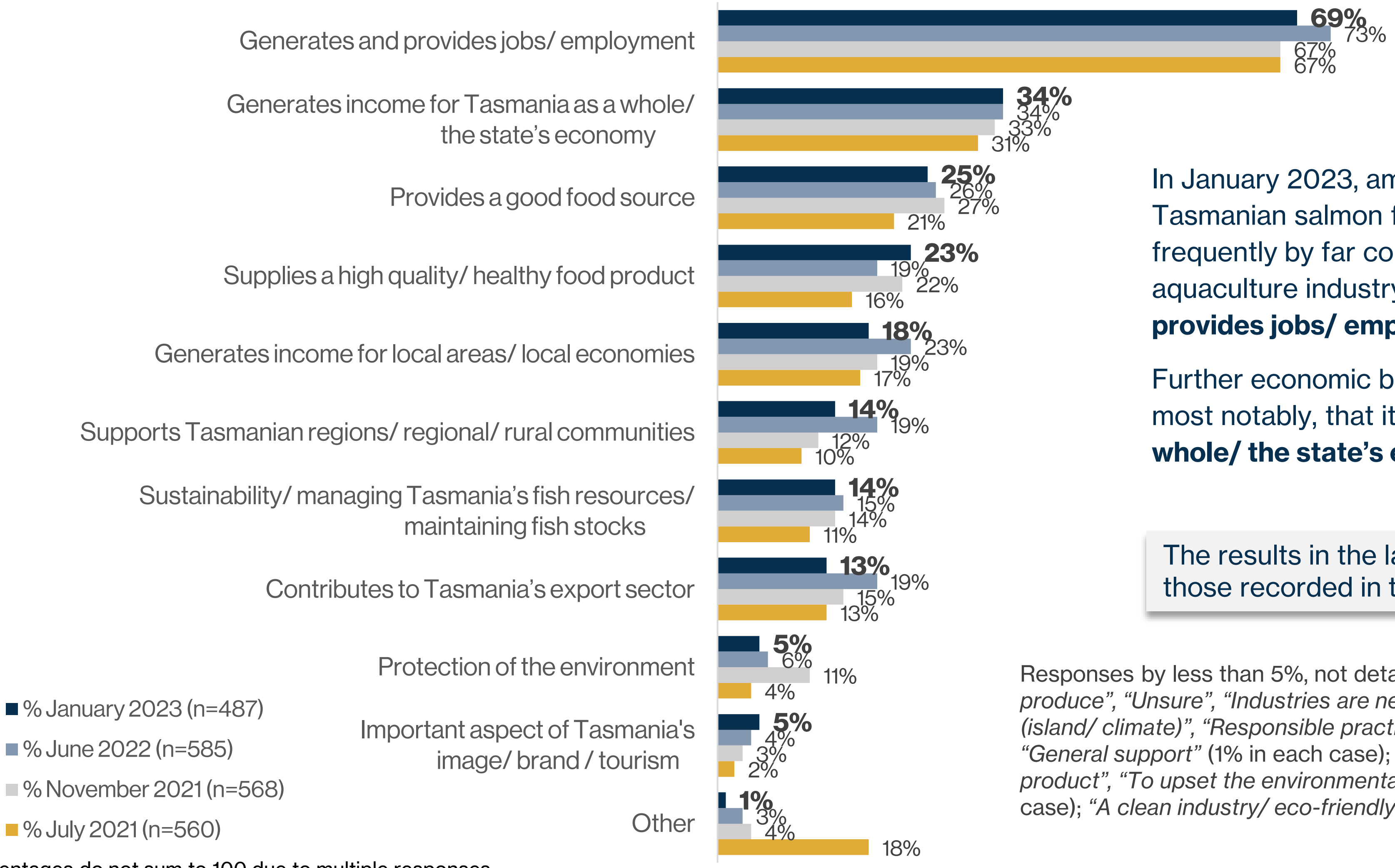
Demographically:

- Males were significantly more likely to "**strongly support**" the industry (31%) than females (17%).

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)*



In January 2023, 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**" (69%).

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 the 2022 and 2021 rounds.

Responses by less than 5%, not detailed in the chart, included: *"Local produce/ fresh produce", "Unsure", "Industries are needed in Tasmania", "Industry well-suited to Tasmania (island/ climate)", "Responsible practices/ improved practices", "Demand for the product", "General support"* (1% in each case); *"Industry is backed by science", "Affordability of the product", "To upset the environmentalists", "Positive, personal experience"* (n=2 in each case); *"A clean industry/ eco-friendly", "Good reputation", "Education"* (n=1 in each case).

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

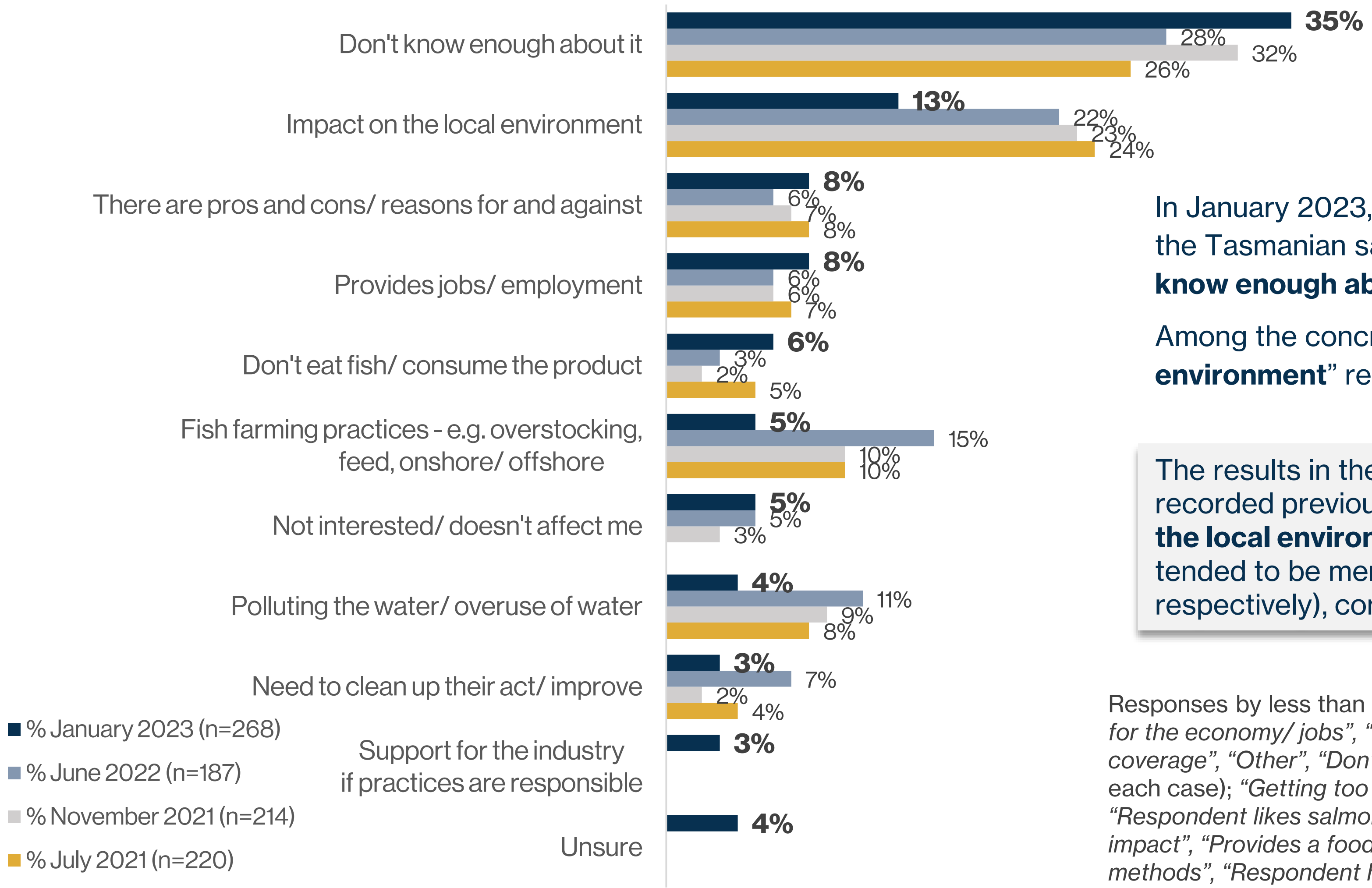
Q. What are your main reasons for supporting the Tasmanian salmon farming industry?

Demographically, there were no significant findings to be noted.

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)*



In January 2023, the respondents who were currently neutral towards the Tasmanian salmon farming industry most frequently stated “**don’t know enough about it**” as their reason (35%).

Among the concrete reasons provided, the “**impact on the local environment**” recorded the highest rate of mention (13%).

The results in the latest round were generally in line with those recorded previously. However, reflecting a focus on nature, “**impact on the local environment**” and “**polluting the water/ overuse of water**” tended to be mentioned less frequently in January 2023 (13% and 4% respectively), compared to June 2022 (22% and 11% respectively).

Responses by less than 3%, not detailed in the chart, included: *“Foreign ownership”, “Good for the economy/ jobs”, “Need the industry/ good for the economy”, ”Bad publicity/ media coverage”, “Other”, “Don't like the location of farms”, “General positive impression”* (2% in each case); *“Getting too big/ too much expansion”, “General negative impression”, “Respondent likes salmon”, “Concerns of over-farming”, “Lack of sustainability”, “Visual impact”, “Provides a food source”, “Supports communities”, “Support for alternative farming methods”, “Respondent has read ‘Toxic’“, “Invasion of public waterways”* (1% in each case).

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

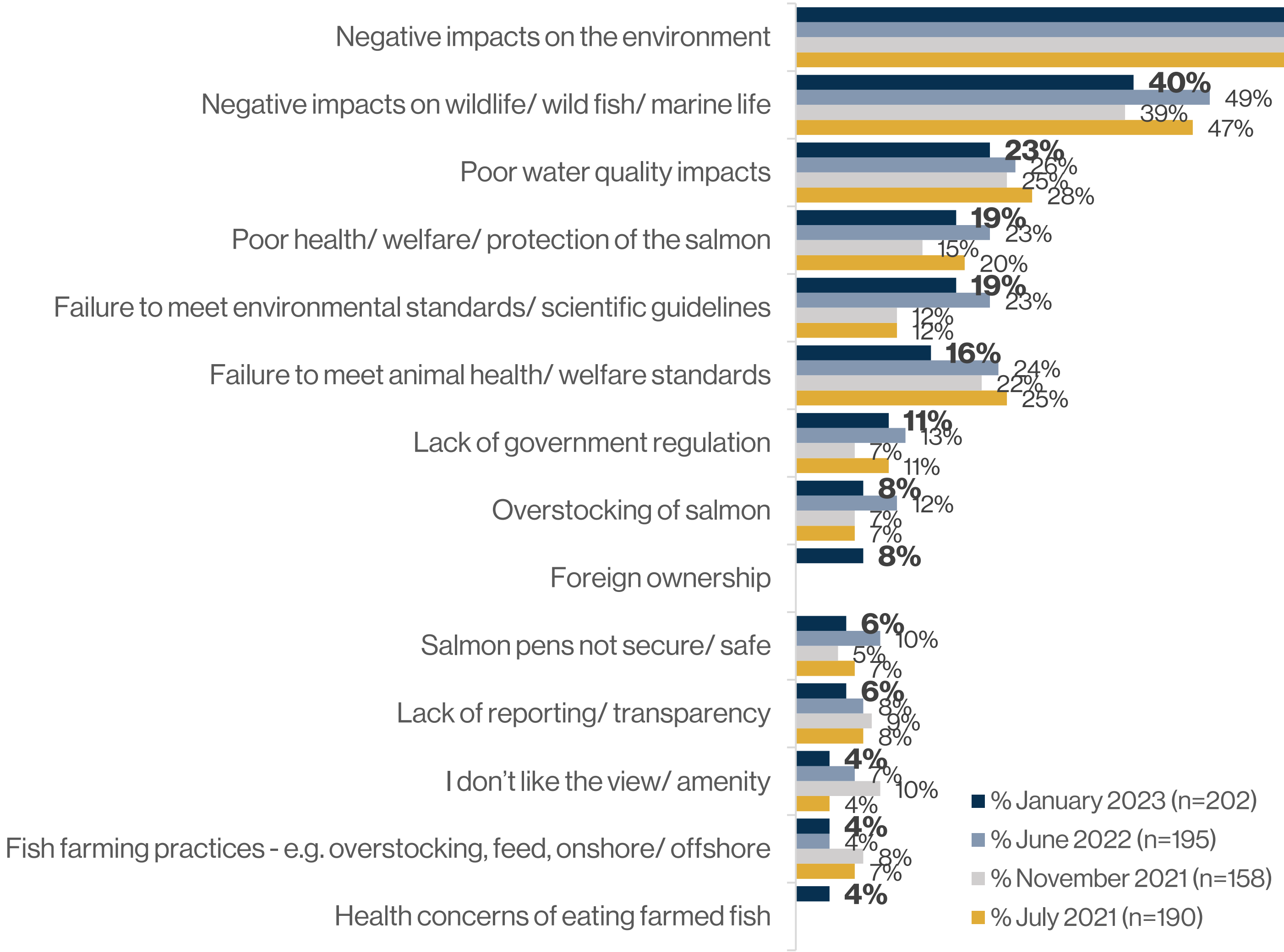
Q. What are your main reasons for being neutral towards the Tasmanian salmon farming industry?

Demographically, there were no significant findings to be noted.

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)*



In January 2023, 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**" (72%), followed by "**negative impacts on wildlife/ wild fish/ marine life**" (40%).

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 "**foreign ownership**" (8%).

Responses by less than 4% of respondents, not detailed in the chart, included: *"Polluting the water/ overuse of water"*, *"Don't like the location of farms"* (3% in each case); *"Getting too big/ too much expansion"*, *"Negative impact on local communities"*, *"General negative impression"* (2% in each case); *"Noise pollution"*, *"Lack of sustainability"*, *"Impact on recreational fishing"*, *"Invasion of public waterways"* (1% in each case).

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

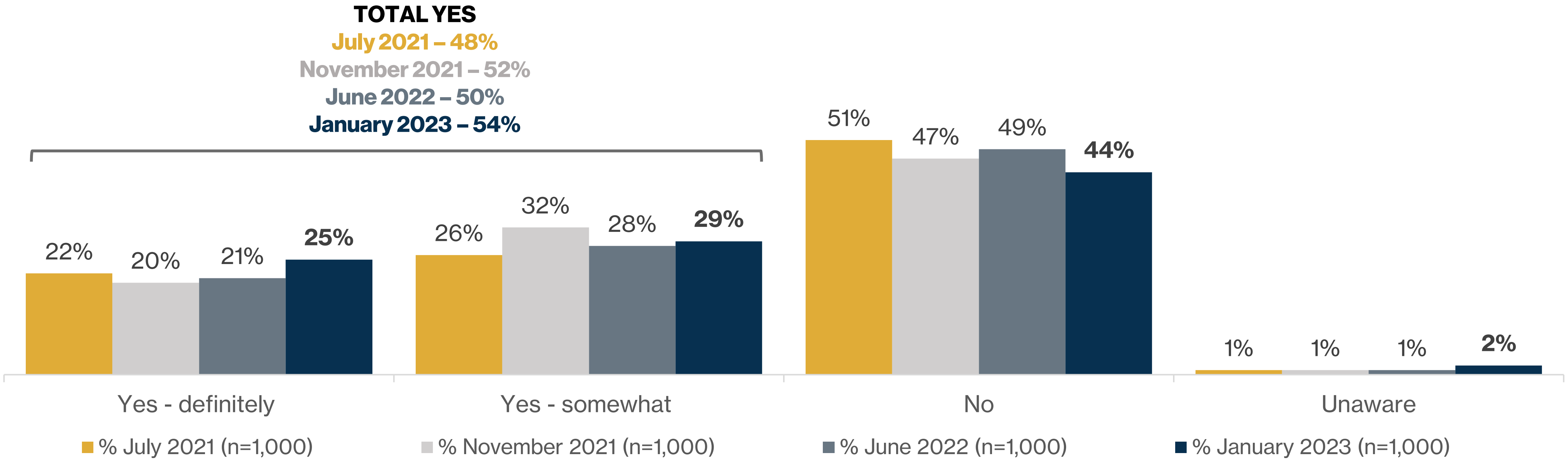
Q. What are your main reasons or concerns in opposing the Tasmanian salmon farming industry?

Demographically, there were no significant findings to be noted.

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 January 2023, more than one half of the full sample stated "**yes**", that they would want to know or understand more about the Tasmanian salmon farming industry (54% in total). Of these 25% said "**yes – definitely**". A further 44% said "**no**".

The latest results showed only marginal variations from those recorded previously in the 2022 and 2021 rounds.

Demographically:
- The older cohort aged 70 years or over were significantly more likely to say "**no**" (58%).

* 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

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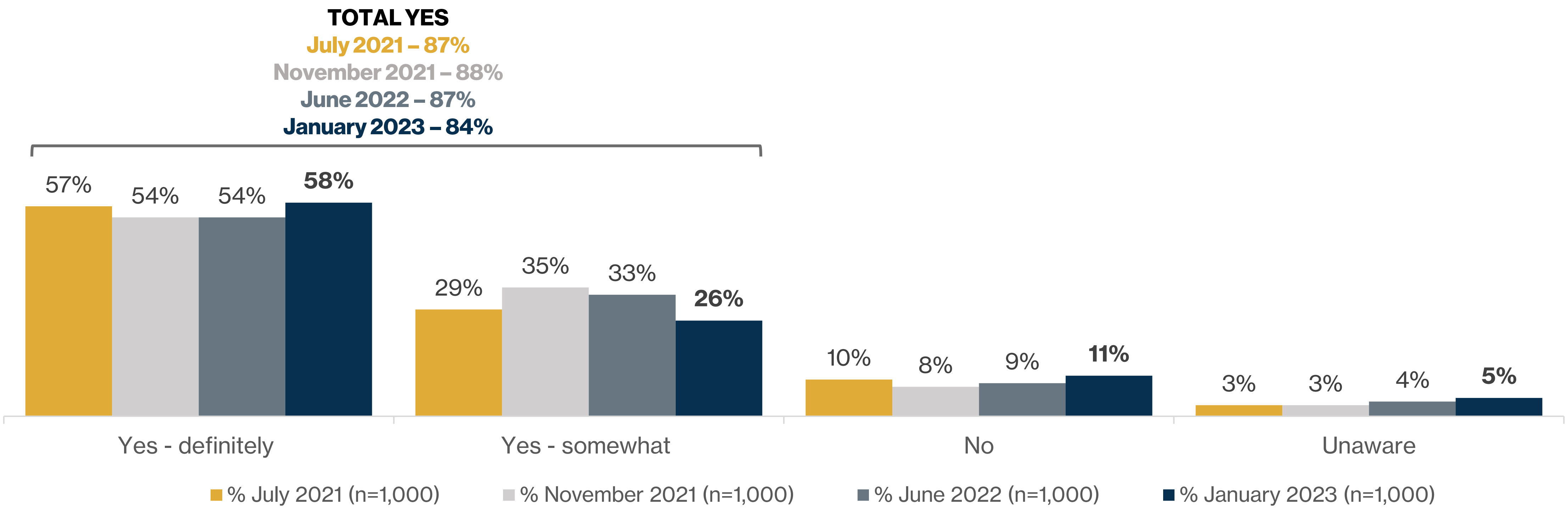
Chart 12 – Perception that the Public Needs More Information about the Salmon Farming Industry

(Percentage of all respondents)*



In January 2023, 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 (84% in total). Those stating "**yes – definitely**" were again in the clear majority (58%).

The latest results showed only marginal variations from those recorded previously in the 2022 and 2021 rounds.

Demographically:

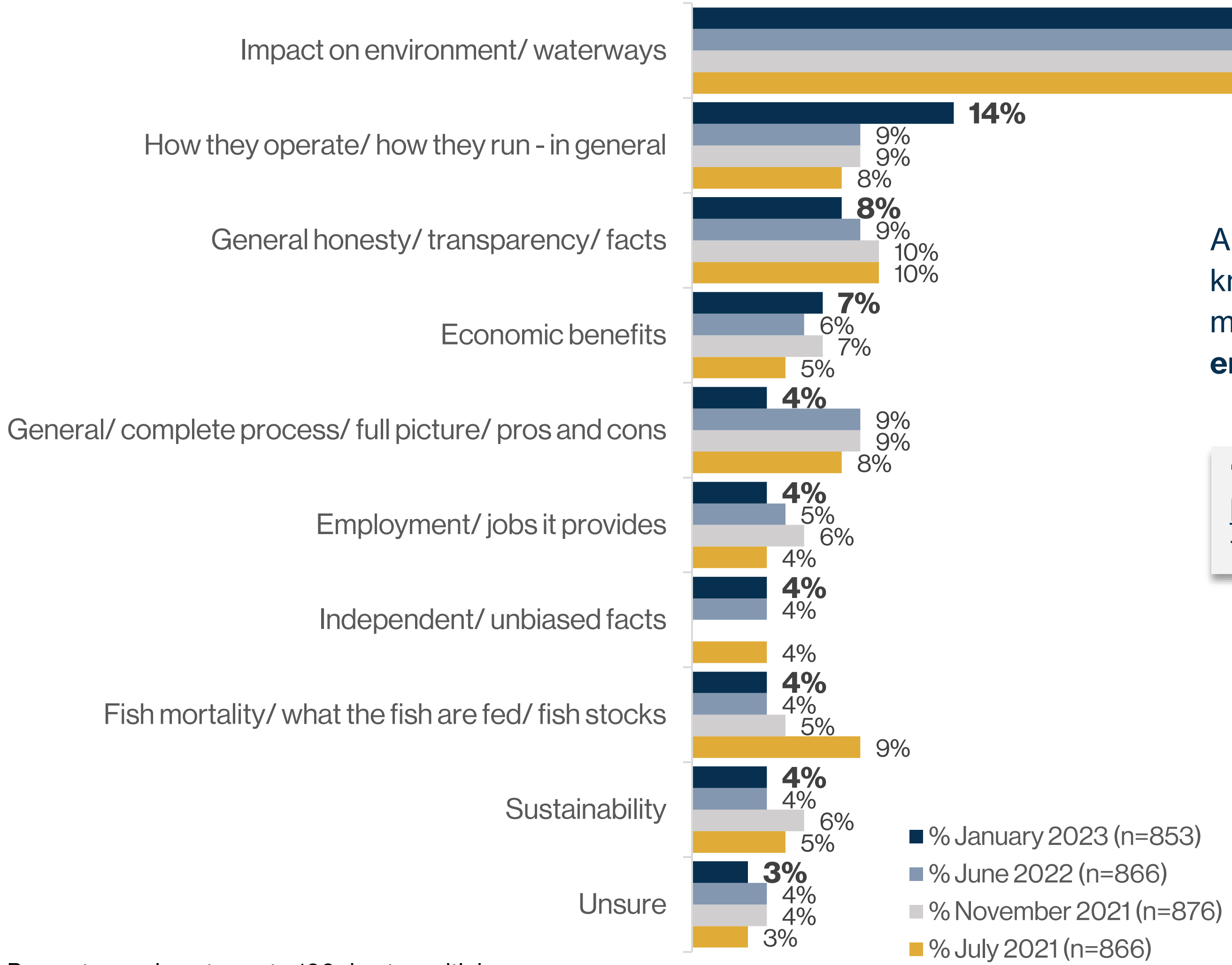
- The older cohort aged 55 to 69 years were somewhat more likely to say "**yes-definitely**" (68%).

* 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 again the "**impact on the environment/ waterways**" (35%).

"**How they operate/ how they run (generally)**" recorded a somewhat higher rate of mention, compared to the previous rounds, but generally there were no conclusive trends to emerge.

Demographically, there were no significant findings to be noted.

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

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

WHAT THE PUBLIC NEEDS TO KNOW OR UNDERSTAND ABOUT THE SALMON FARMING INDUSTRY (cont'd)

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

(Percentage of respondents stating "yes" the public needs to know or understand more)

Responses by less than 4%, not detailed in the chart on the previous page, included:

"Benefits to Tasmania/ why it is needed", "Concerns regarding the foreign ownership", "More advertising/ awareness/ information", "Location considerations - current and future", "How they can farm better/ improve their practices", "Other", "How it works/ what's involved (generally)", "Everything/ more information (NFI)", "Consumers are affected by negative publicity", "Harm or cruelty to marine life" (3% in each case);

"Regulations/ how it's regulated", "Industry's environmental practises & policies", "A major industry in Tasmania", "The public needs a balanced view", "Where do the profits go', "Awareness of the industry (and potential pollution)" (2% in each case);

"Health implications of consuming salmon", "How much waste is produced", "Support of local community", "Affects on tourism or fishing", "A safe/ quality product", "Industry is compliant with standards and regulations", "Relationship with Government/ assistance", "Farming techniques/ on-shore vs offshore", "Confusion / mixed messaging", "Effects of overfishing", "Exports", "Industry is responsible and/or not harmful", "A need for humane farming practices", "Awareness of where farmed salmon comes from", "Expansion plans/ future/ long term plans", "Too many fish farms/ expansion to be curbed", "General support for the industry", "Positives of the industry", "Greens & environmentalists are ill-informed", "Industry's negative image may be undeserved", "Industry is addressing its environmental impact", "Updates/ how it's going/ is it having an impact", "Animal welfare standards", "The use of food colouring" (1% in each case).

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

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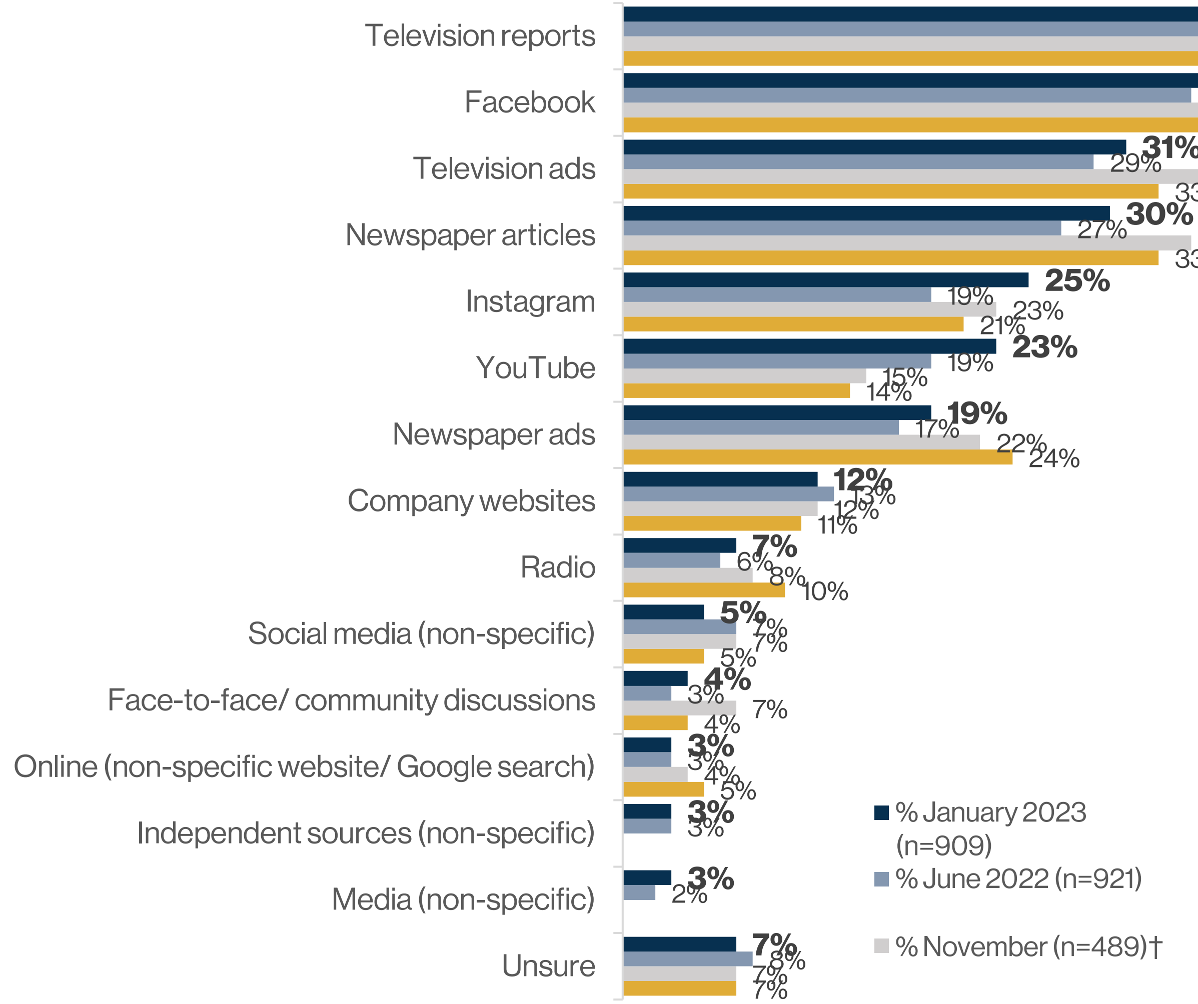
Chart 14 – Best Channels for Providing Information about the Salmon Farming Industry

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



* 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?

In January 2023, 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**" (43%), "**television ads**" (31%) and "**newspaper articles**" (30%).

However, a significantly large proportion again cited "**Facebook**" (39%) and, to a somewhat lesser degree, "**Instagram**" (25%) and "**YouTube**" (23%).

The latest results showed only marginal variations from those recorded previously in 2022 and 2021.

Responses by less than 3%, not detailed in the chart, included: *"Independent scientific research/ authority", "Government-issued media/ publications", "Documentaries"* (2% in each case); *"Mail/ letterbox drops", "Other", "The ABC", "TikTok", "Schools", "Supermarket displays/ product packaging", "Everything/ all of the above", "Twitter", "Tours/ open days", "Local council", "Industry sources and associates", "Flyers"* (1% in each case).

Demographically:

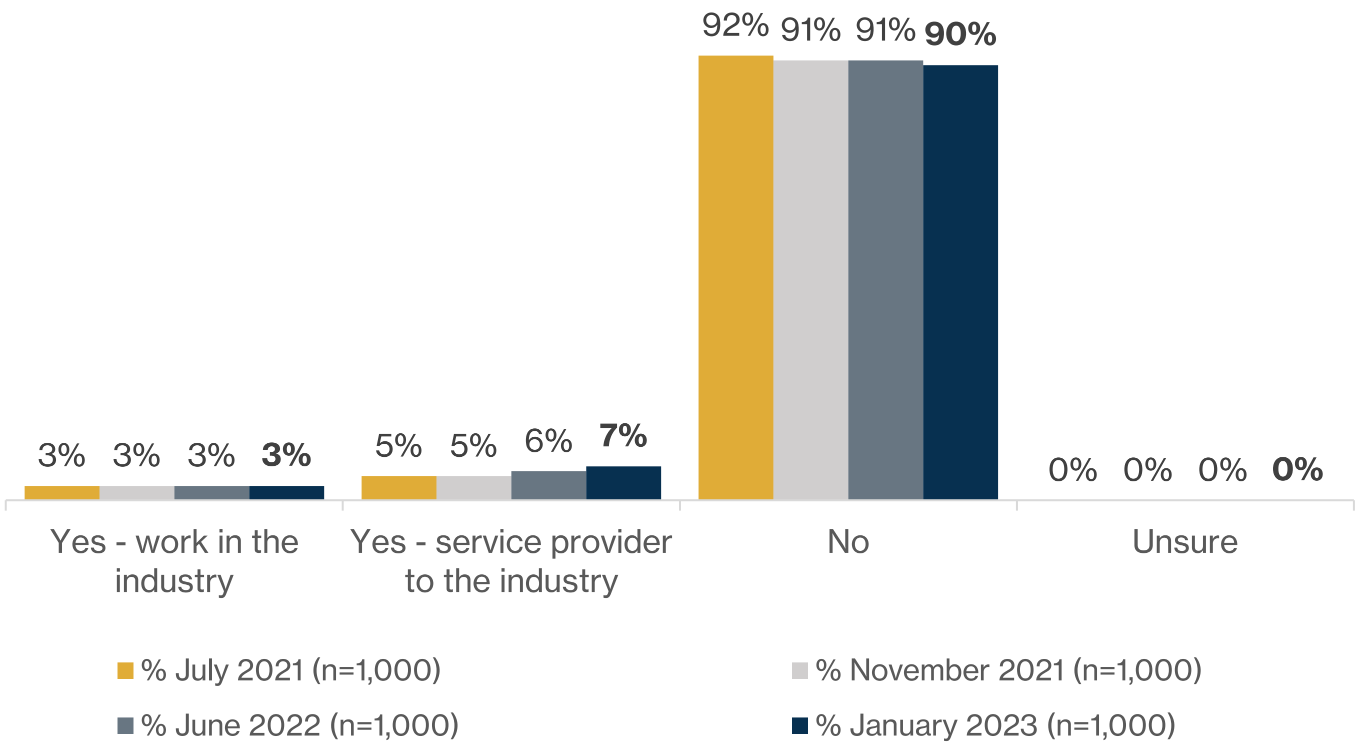
- Respondents aged 18 to 34 years were somewhat more likely to nominate "**Facebook**" (55%) and significantly more likely to nominate "**YouTube**" and "**Instagram**" (41% in each case) as the best channels.
- Respondents aged 55 years or over were significantly more likely to nominate "**television reports**" (54%) and **"newspaper articles"** (38%).

†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 January 2023, 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 (90%).

Similarly small samples confirmed that they worked in the industry (3%) or were service providers to the industry (7%).

The current results showed only marginal variations from those recorded previously.

Demographically:

- Male respondents were somewhat more likely to report having personal experience as a **service provider** to the industry (10%, compared to 4% of females).
- Respondents aged 35 to 44 years were somewhat more likely to report having personal experience as a **service provider** to the industry (15%).

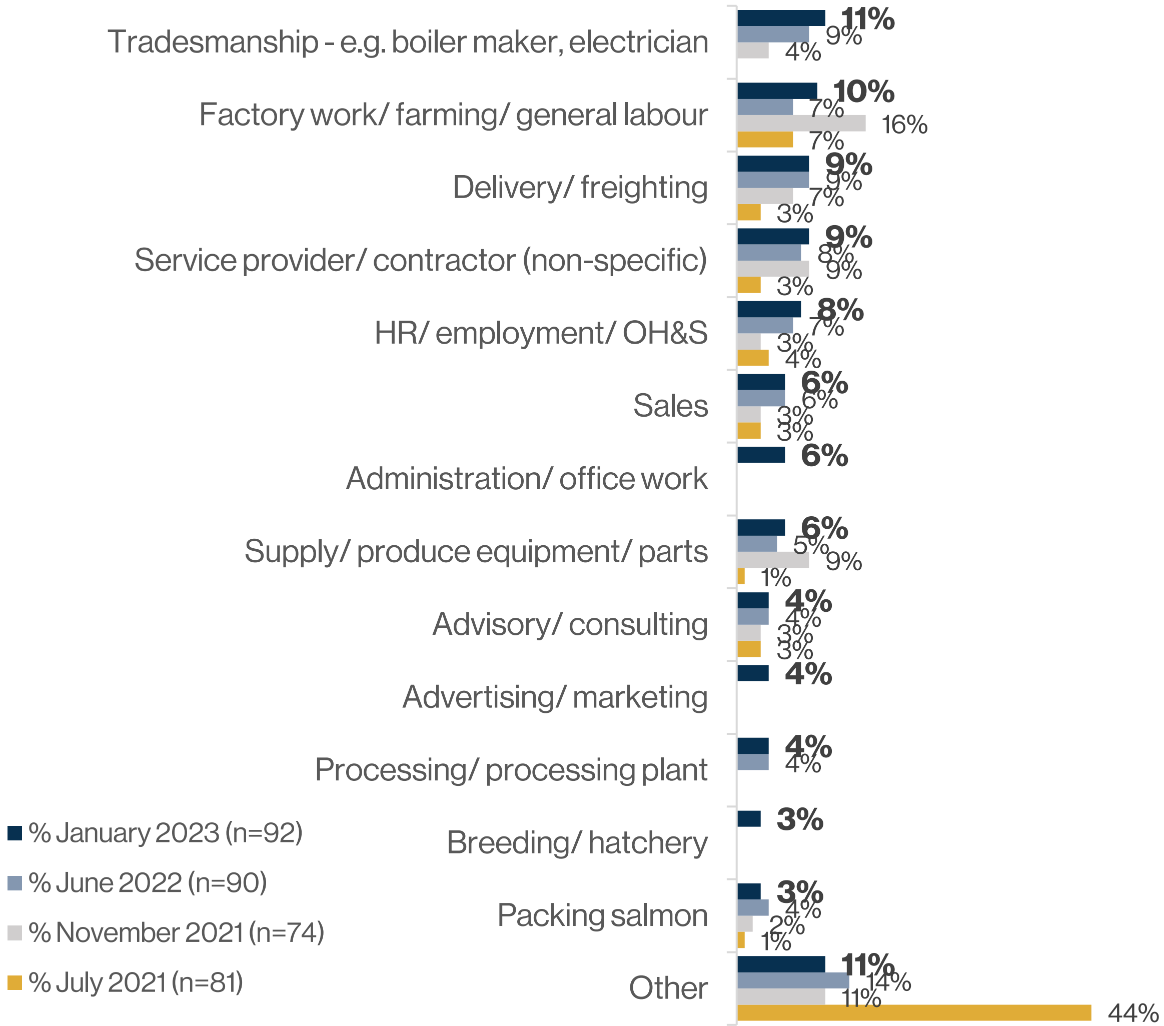
* Percentages do not sum to 100 due to multiple responses, except for "no" and "unsure" which were exclusive answers.

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)*



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

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

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 11% (n=11) or less. The most frequently mentioned roles were: "**tradesmanship e.g. boiler maker, electrician**" (11%) and "**factory work/ farming/ general labour**" (10%).

The current results showed only marginal variations from those recorded previously.

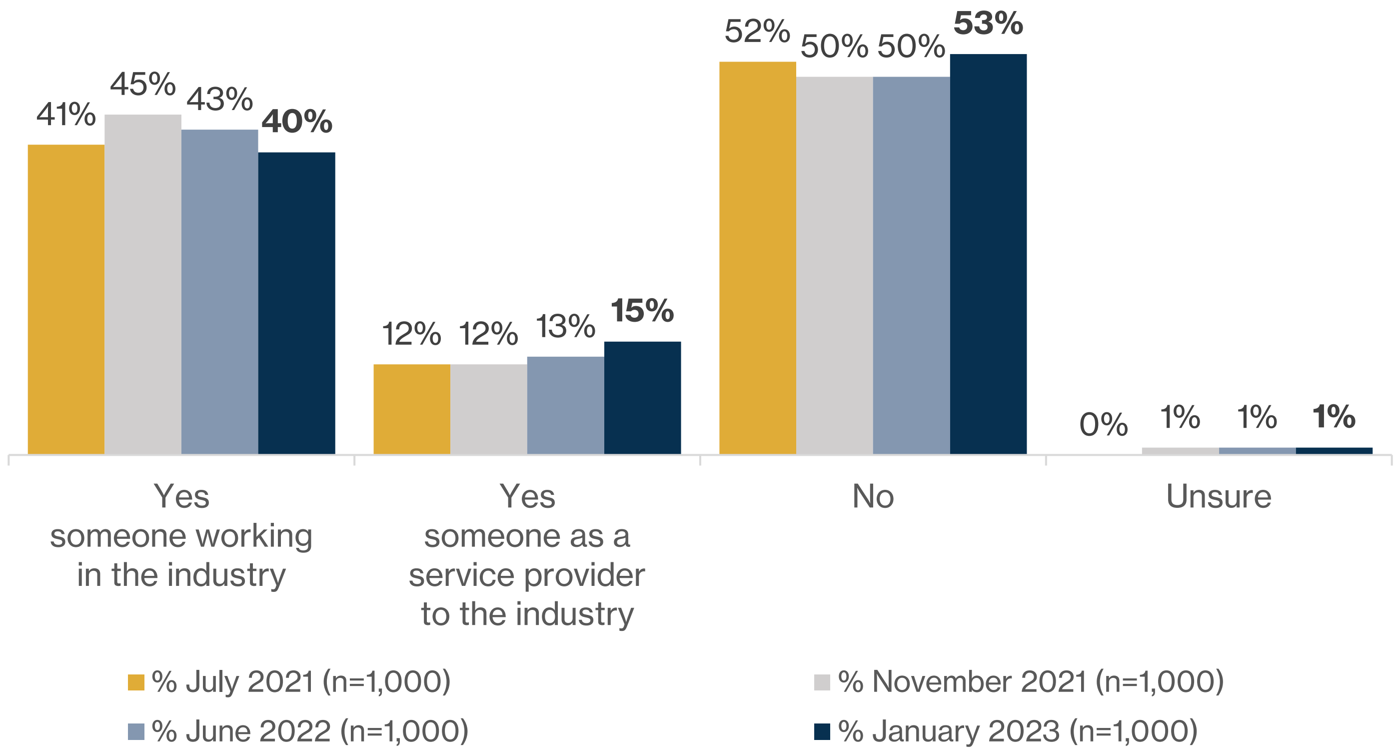
Responses by less than 3%, not detailed in the chart, included: *"Management role", "Cleaners", "Declined to answer", "Regulating/ regulator"* (2% in each case); *"Cleaning/ filleting fish", "Auditing", "Electronics/ technology", "Diver", "Engineering"* (1% in each case).

Demographically, there were no significant findings to be noted.

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 January 2023 confirmed that they **knew someone working in or as a service provider to the salmon farming industry** (46% in total), highlighting the significant ongoing role it plays in Tasmania as an employer and contractor.

The latest January 2023 results remained virtually unchanged from those recorded previously.

Demographically:

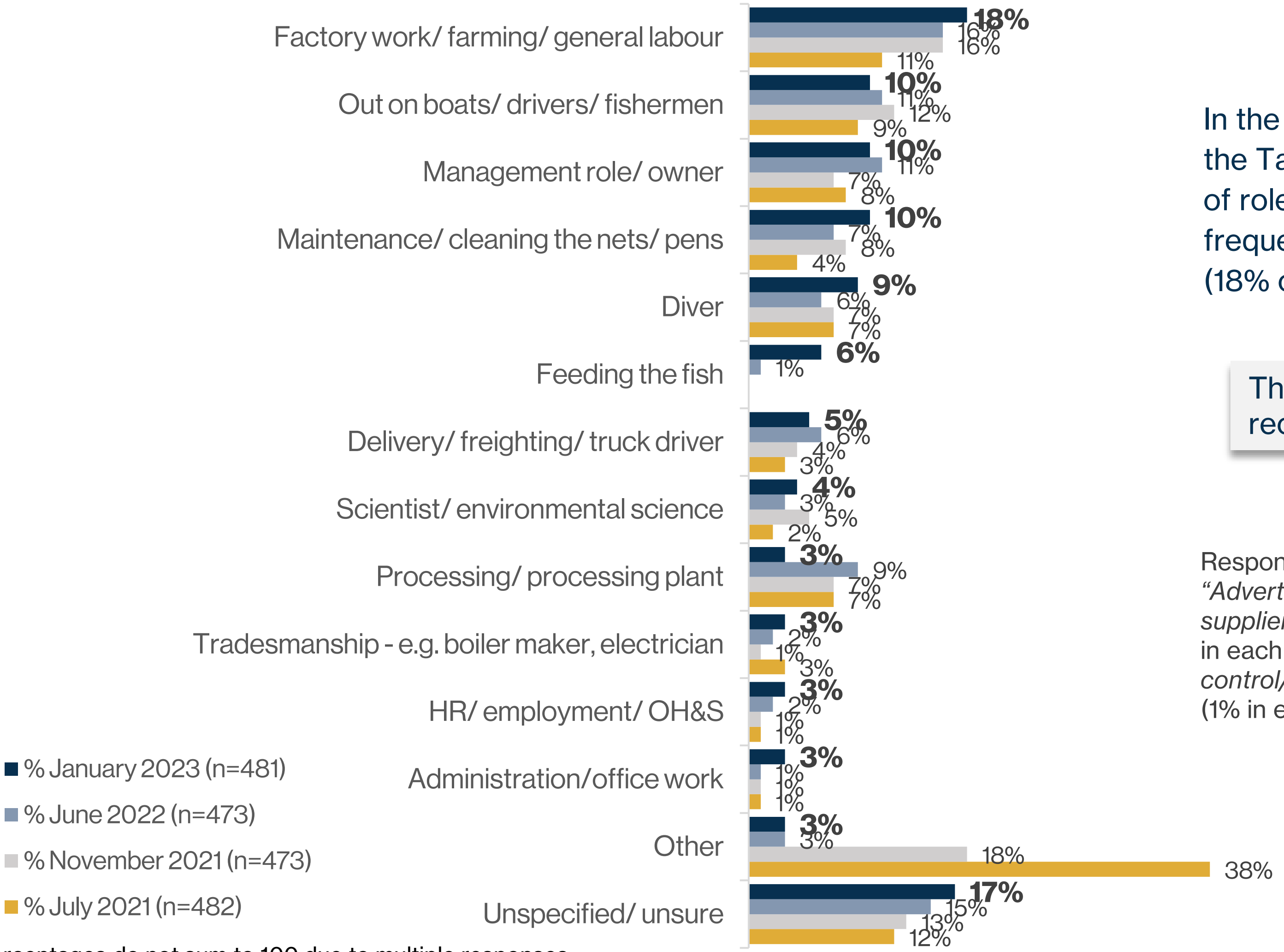
- Respondents aged 45 to 69 years were somewhat more likely to know someone **working in the industry** (48%).
- Males were significantly more likely to know someone **with links to the industry** (53% in total) than females (39% in total).
- Respondents in Hobart and the South East were significantly more likely to know someone **working in the industry** (45%), compared to those in Launceston and the North East (29%).

* 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)*



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

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

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 18% or less. Most frequently mentioned was "**factory work/ farming/ general labour**" (18% currently, compared to 16% in June 2022).

The current results showed only marginal variations from those recorded previously.

Responses by less than 3%, not detailed in the chart, included: *"Breeding/ hatchery", "Advertising/ marketing", "Supply/ produce equipment/ parts", "Feed production/ supplier", "Cleaning/ filleting fish", "Packing salmon", "Building/ supplier of pens"* (2% in each case); *"Engineering", "Service provider/ contractor (NFI)", "Sales", "Quality control/ assessment", "Accountant", "Electronics/ technology", "Repaired equipment"* (1% in each case).

Demographically, there were no significant findings to be noted.

IMPORTANCE RANKING OF SPECIFIED ELEMENTS OF THE TASMANIAN SALMON FARMING INDUSTRY

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

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

Element	Percentage of respondents (n=1,000)											
	TOTAL IMPORTANT (4-5)				Neutral 3				TOTAL NOT IMPORTANT (1-2)			
	Jul. 2021	Nov. 2021	Jun. 2022	**Jan. 2023**	Jul. 2021	Nov. 2021	Jun. 2022	**Jan. 2023**	Jul. 2021	Nov. 2021	Jun. 2022	**Jan. 2023**
Maintain high animal health and welfare standards	94	93	92	**92↑**	2	4	4	**4↓**	2	1	3	**3↓**
Protect the natural environment and wildlife	93	92	91	**91↑**	3	5	5	**4↓**	3	2	3	**4↓**
Provide a high quality, healthy food product	93	92	91	**90↑**	3	4	4	**5↓**	3	3	3	**5↓**
Public transparency and reporting on its operations	88	88	87	**86↑**	8	8	8	**8↓**	3	3	3	**4↓**
Maintain sustainable fish stocks	87	87	86	**84↑**	5	7	6	**9↓**	5	3	4	**4↓**

* 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 January 2023 were closely in line with those recorded previously.

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)

emrs Part of the C|T GROUP

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)				Neutral 3				TOTAL NOT IMPORTANT (1-2)			
	Jul. 2021	Nov. 2021	Jun. 2022	**Jan. 2023**	Jul. 2021	Nov. 2021	Jun. 2022	**Jan. 2023**	Jul. 2021	Nov. 2021	Jun. 2022	**Jan. 2023**
Generate income for the local economy	84	84	83	**82↑**	10	11	11	**11**	5	4	5	**6**
Generate and provide training, jobs and employment	84	84	83	**82**	11	11	10	**12**	5	4	6	**6**
Support Tasmania's regions and regional communities	79	80	76	**73↓**	12	14	14	**16↑**	7	5	8	**10**
Support of local community events and groups	60	58	57	**56↓**	25	26	24	**23↑**	13	14	16	**18↑**
Community sponsorships and partnerships	56	51	53	**52↓**	26	31	27	**26↑**	15	15	17	**19↑**

* 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 January 2023 were closely in line with those recorded previously.

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)

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 January 2023, included:

- **Maintain high animal health and welfare standards** (92% in total, 80% a top score of "5")
- **Protect the natural environment and wildlife** (91% in total, 80% a top score of "5")
- **Provide a high quality, healthy food product** (90% in total, 77% a top score of "5")
- **Public transparency and reporting on its operations** (86% in total, 71% a top score of "5")
- **Maintain sustainable fish stocks** (84% in total, 65% a top score of "5")

The two elements that recorded the lowest total levels of perceived importance in January 2023, with top scores of "4" or "5", were:

- **Support of local community events and groups** (56% in total, 30% a top score of "5")
- **Community sponsorships and partnerships** (52% 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:

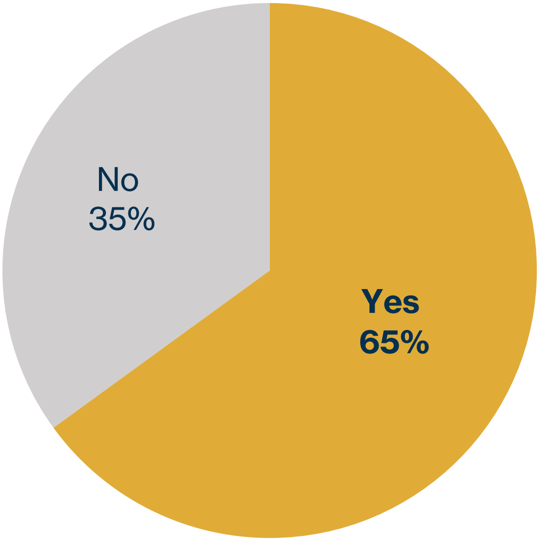
- Female respondents were significantly more likely to rate the industry **protecting the natural environment and wildlife** and **maintaining high animal health and welfare standards** as "very important" (86% and 85% respectively), compared to the males (75% in each case).
- Respondents aged 55 to 69 years were significantly more likely to rate the **public transparency and reporting on its operations** as "very important" (81%), than the younger cohort aged 18 to 24 years (49%).

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".

CONSUMPTION OF SALMON AND FURTHER PERCEPTIONS OF THE SALMON FARMING INDUSTRY

CONSUMPTION OF TASMANIAN SALMON

Chart 19 – Consumption of Tasmanian Salmon
(Percentage of all respondents)



% January 2023 (n=1,000)

In January 2023, around two thirds of all respondents confirmed that "**yes**", they eat Tasmanian salmon (including fresh salmon and salmon products) (65%), while the remaining 35% said "no".

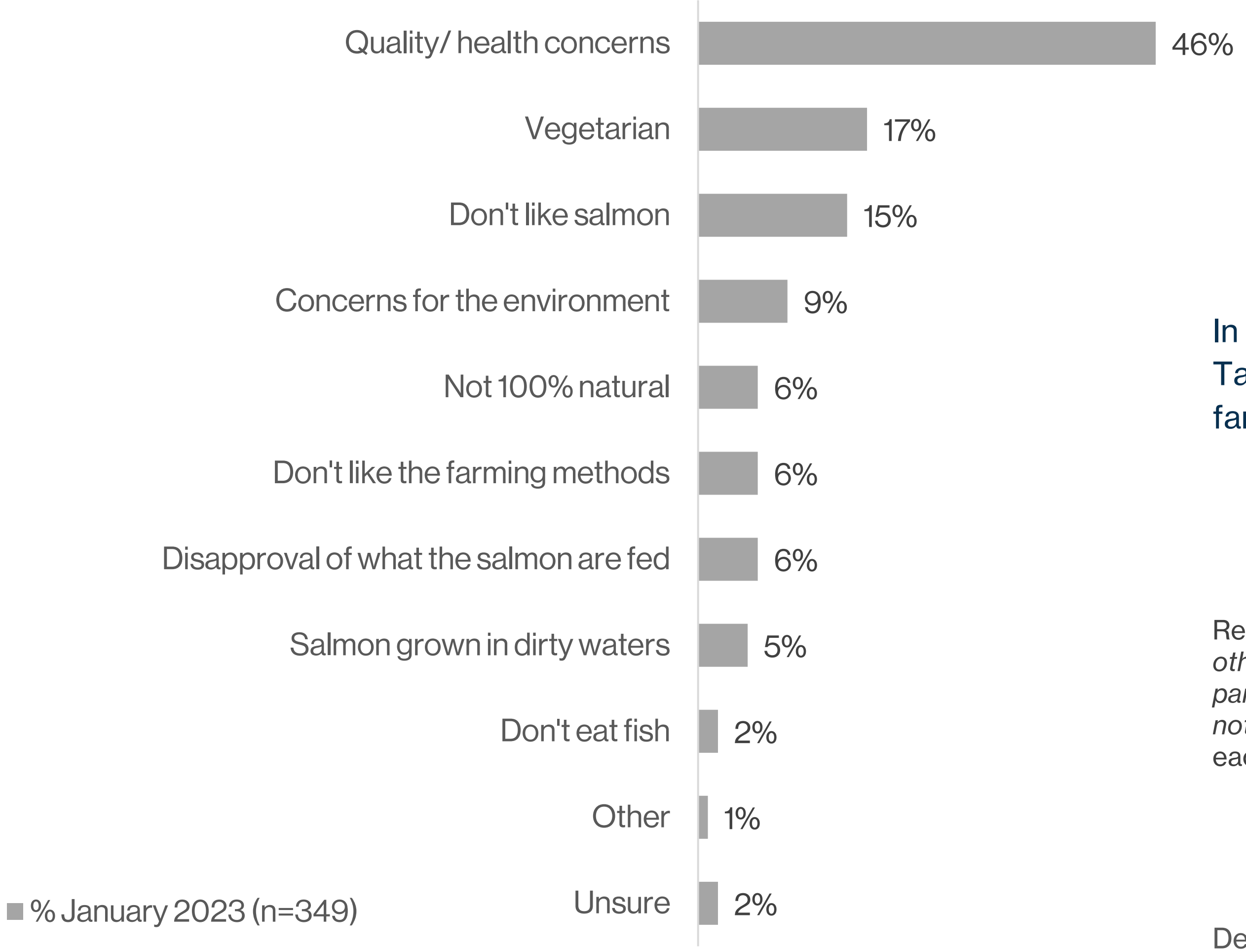
Demographically, there were no significant findings to be noted.

Q. Do you eat Tasmanian salmon?

Questions in this section were added to the survey questionnaire in January 2023, therefore there is no historical data to compare from previous rounds.

REASONS FOR NOT EATING TASMANIAN SALMON

Chart 20 – Reasons for NOT Eating Tasmanian Salmon
(Percentage of respondents who did not eat salmon)*



In January 2023, among the respondents who did not eat Tasmanian salmon, the reason they cited most frequently by far was "**quality/ health concerns**" (46%).

Responses by less than 2%, not detailed in the chart, included: *"Prefer fish other than salmon", "Diet / health advice", "Prefer to catch own fish", "No particular reason", " Farmed fish inferior to wild-caught fish", "Too oily", "Will not support the industry", "Don't like the taste", "Food colouring"* (1% in each case).

Demographically, there were no significant findings to be noted.

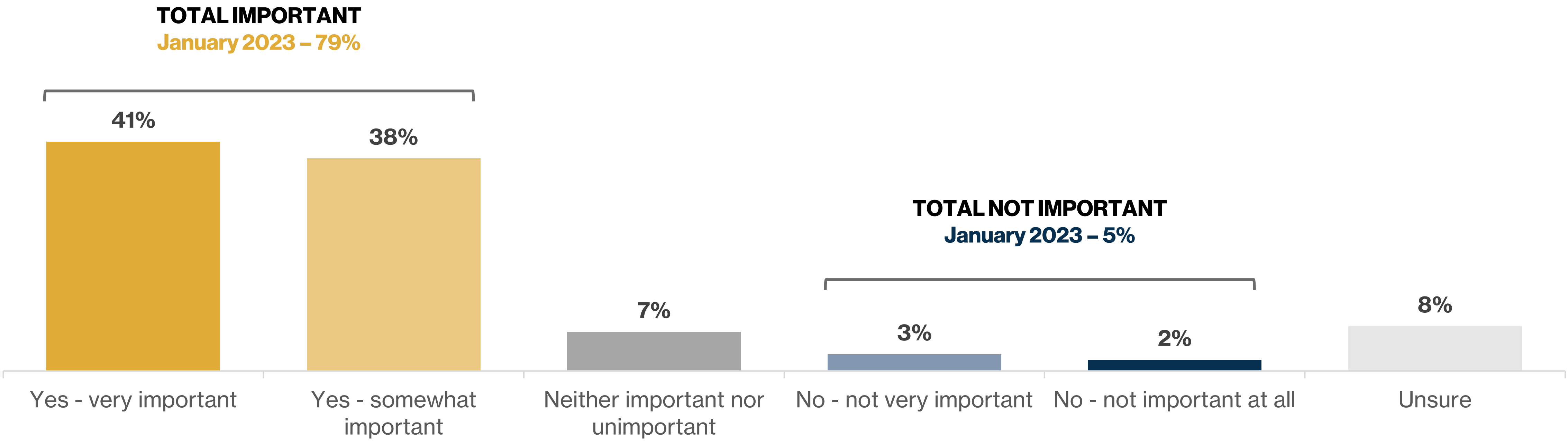
* Percentages do not sum to 100 due to multiple responses.

Q. What is your main reason for not eating Tasmanian salmon?

Questions in this section were added to the survey questionnaire in January 2023, therefore there is no historical data to compare from previous rounds.

LEVEL OF IMPORTANCE OF THE SALMON FARMING INDUSTRY TO THE STATE'S ECONOMY

Chart 21 – Level of Importance of the Salmon Farming Industry to the State's Economy
(Percentage of all respondents, n=1,000)*



In January 2023, around **four in five** respondents confirmed that the Tasmanian salmon farming industry makes an **important** contribution to the state's economy (79% in total), with the slightly larger proportion stating "**very important**" (41%).

In total, only 5% thought the salmon farming industry **not important** to some degree, while 7% held a **neutral** view and a further 8% were **unsure**.

Demographically, there were no significant findings to be noted.

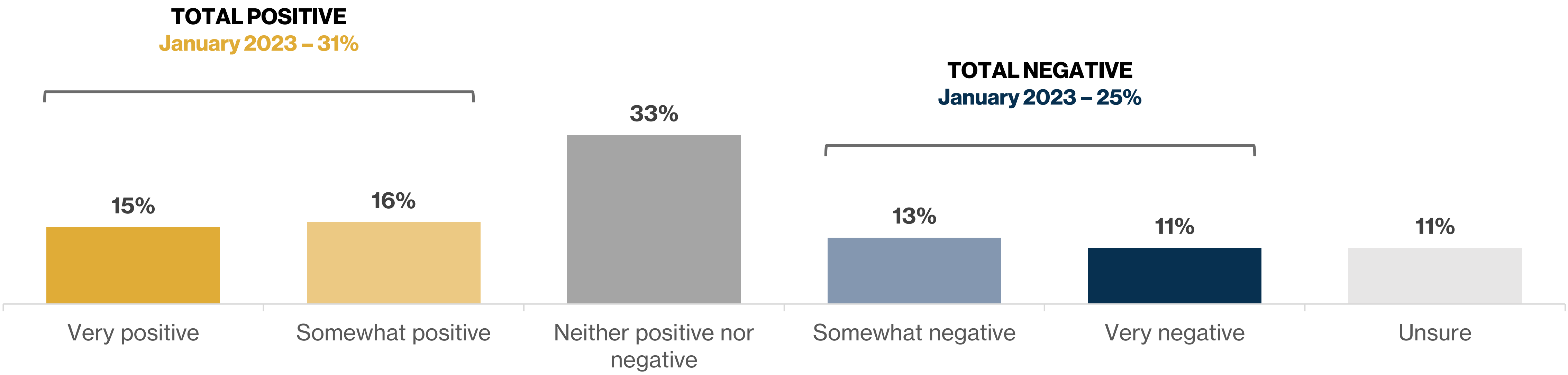
* Percentages do not sum to 100 due to rounding.

Q. Do you think the Tasmanian salmon farming industry makes an important contribution to the state's economy?

Questions in this section were added to the survey questionnaire in January 2023, therefore there is no historical data to compare from previous rounds.

PERCEPTIONS OF POLITICIANS WHO SUPPORT THE TASMANIAN SALMON FARMING INDUSTRY

Chart 22 – Perceptions of Politicians Who Support the Tasmanian Salmon Farming Industry
(Percentage of all respondents, n=1,000)*



In January 2023, around **one third** of all respondents had a **positive** view of politicians who support the Tasmanian salmon farming industry (31% in total), while **one quarter** had a **negative** view (25% in total). At 33%, a significant proportion stated “neither positive nor negative”, and a further 11% were “unsure”.

Demographically:

- Respondents aged 55 years or over were somewhat more likely to hold a **negative** view (32% in total).
- Males were somewhat more likely to have a **positive** view (39% in total, with 19% “very positive”), than females (25% in total, with 11% “very positive”).
- Respondents in Hobart and the South East were somewhat more likely to say “**neither positive nor negative**” (38%). Those in the West and North West were somewhat more likely to have a **positive** view (40% in total, with 24% “very positive”).

* Percentages may not sum to 100 due to rounding.

Q. Do you have a positive or negative view of politicians who support the Tasmanian salmon farming industry?

Questions in this section were added to the survey questionnaire in January 2023, therefore there is no historical data to compare from previous rounds.