



Our Pledge

Australian seafood industry response to community values and expectations

Dan French

Jane Lovell

Veronica Papacosta

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Researcher Contact Details

Name: Daniel French
Phone: 04007592145
Email: dan@frenchenviro.com.au

FRDC Contact Details

Address: 25 Geils Court
Deakin ACT 2600
Phone: 02 6285 0400
Fax: 02 6285 0499
Email: frdc@frdc.com.au
Web: www.frdc.com.au

In submitting this report, the researcher has agreed to FRDC publishing this material in its edited form.

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- Northern Territory Seafood Council
- Queensland Seafood Industry Association
- Tasmanian Seafood Industry Council
- Wildcatch Fisheries South Australia
- Professional Fisher's Association (New South Wales)
- Sydney Fish Market
- Geraldton Fishermen's Co-operative
- The Spencer Gulf and West Coast Fishermen's Association
- Australian Council of Prawn Fisheries

Executive Summary

Background

The Australian seafood industry has clearly identified social licence and community perceptions as critical issues for its ongoing viability and prosperity. This is because current research shows substantial proportions of the Australian public are concerned or knows little about the ethics, environmental impact and governance of the seafood industry.

This is of concern for the seafood industry, which seeks respect, support and advocacy from its immediate stakeholders and the Australian public to support its ongoing viability and prosperity. Failure to achieve these objectives can have dire consequences, resulting in the erosion of the industry's social licence to operate. For example, in 2014 the MV Margiris lost 18 000 tonne of allocated quota and was excluded from fishing in Australian waters for 2 years as it was viewed as acting in a way that conflicts with community sentiment despite strong scientific and management support for its operations.

Aims/objectives

To help improve industry's social licence, this project aimed to develop a clearer understanding of community and industry values and underpinning behaviours to identify both threats to social licence and behaviours community would like to see reinforced by industry.

To achieve this the project set objectives to identify measures and benchmarks of industry behaviours that are consistent with industry values, behaviours and values that community shares and deems important regarding how industry acts. Using these findings, this project aims to select values industry is willing to commit to and share. Selection of these shared values and behaviours will then provide an opportunity for the seafood industry to address community concerns by better articulating current practices and identifying areas where practices and behaviours can be improved.

The outputs of this project will also provide a mechanism for the alignment of RD&E investments against community values, and clear rationale for enhanced uptake and extension of FRDC projects to help industry adapt as community concerns change over time.

Methodology

A stepwise approach was used to gain an understanding community and seafood industry values. This was followed by a national conversation within the seafood industry regarding community expectations and developing a tangible value statement and commitment to action.

Methods used to collect data and information included desktop review, interviews and surveys. A large, diverse stakeholder group reviewed the outputs from these preliminary investigations during a series of workshops to reach consensus on an industry statement (referred to as "Our Pledge"). This statement represents industry core values and its commitment to honouring ethics and practices that shared by both industry and community alike.

Results/key findings

An analysis of contemporary research on Australian society's current values and expectations of the seafood industry revealed that primary concerns relate to environmental sustainability and industry and government accountability. The values and expectations of Australian society identified during this analysis and deemed relevant were then compared to the documented values and practices of the seafood industry to identify commonalities between the two. The following key values and practices were highlighted as important by both groups:

- environmental sustainability
- responsible practices and stewardship

- quality product
- striving to connect and meet expectations of seafood consumers, customers and communities
- desire to collaborate, engage and have positive relationships with stakeholders, government, businesses and community
- commitment to sharing information about the industry, businesses and products

Comparison of community values and expectations of the seafood industry with the actual values and practices of the seafood industry indicated good alignment between the two. The core values and practices identified as mutually important became the basis for the formation of the elements of the “Our Pledge” statement, which was finalised using an extensive internal industry and external community survey-based review process.

Supporting evidence was sought to validate that the core values included in “Our Pledge” that represent the shared values of the seafood industry and community extend to industry practice. Although some ways in which Our Pledge element can be demonstrated and evaluated were identified, the development of explicit measurable benchmarks of industry behaviours and performance to help facilitate accountability and transparency were not formalised as originally intended during this project due to the complexity of this task. These outputs have been transferred to a related project funded through an Australian Government grant program: “Marketing the Australian seafood industry – demonstrating our commitment to long-term sustainability and environmental responsibility” scheduled for completion September 2020.

Implications for relevant stakeholders

Our Pledge has been developed as a mechanism for building social licence at an industry scale via representation of values relevant to the entire diverse national seafood industry, and has been validated via community survey as effective in relating and responding to stakeholder and community concerns to build trust and ultimately support for the seafood industry. Our Pledge is a valuable tool that can be used to further develop social licence at an industry scale that has capacity to help enable industry’s growth, prosperity and contribution to society on a continued basis well into the future.

Moreover, Our Pledge provides a conduit for framing conversations about the commercial industry’s response to community concerns that can be supported by key performance indicators (benchmarks) and case studies/stories.

Its value can only be measured over time. However, this study provides a baseline for the shared values and practices of the entire professional seafood industry spanning wild caught, aquaculture and post-harvest sectors. The non-technical language facilitates two-way conversations regarding future directions and responsibilities of industry nationally.

The extensive testing of the concept of Our Pledge has resulted in the production of a mechanism that has broad industry and community appeal, and that can be used to support dialogue, accountability and the extension (uptake) of a number of other tools and resources already developed to improve social licence. It also provides a mechanism to streamline future research and development and industry related data collection into categories that can easily be related to tangible outcomes.

Success will be heavily reliant on incorporating community feedback into decision making, and responsiveness by industry in shaping future initiatives for influencing social licence.

Recommendations

This report makes five recommendations for consideration by industry when seeking to engage with the Australian community – these include:

1. Commit to and prioritise transparency and accountability
2. Develop goals before evaluating performance
3. Ensure evidence supporting Our Pledge (and other demonstrations of shared values/behavioural norms) is easy to understand
4. Engage in regular outreach and engagement
5. Be responsive and open to change

Keywords

Seafood industry, Our Pledge, community engagement, values, practices, accountability, transparency, responsiveness, trust, conversations, communication, evaluation, social licence

1. Introduction

1.1 Background

The Australian seafood industry has clearly identified social licence and community perceptions as critical issues for its ongoing viability and prosperity. Although the term 'social licence' is often hard to define and measure, in the context of this report and the initiative it details, social licence exists "when a project, organisation, institution, venture, operation or other holds the current and ongoing approval and social acceptance of the network of stakeholders upon which it may impact" (Davies, 2019). Furthermore, as described by Davies (2019) we also believe that when social licence exists, it so does at three distinct levels, these being:

1. A lower, general level of acceptance, meeting minimum requirements to enable business as usual.
2. A higher level of approval whereby confidence in a project, company or organisation from those who influence its viability is at a level that risk of disruption from this source is relatively mitigated.
3. A much higher level of advocacy by which various stakeholder communities feel ownership, pride and are emotionally invested to the point they are willing to become defenders and advocates for the concern.

Conversely, when social licence is eroded or does not exist, the viability of the projects or entity concerned is threatened because of increased scrutiny, criticism and outright challenge from internal and external stakeholders. These responses may arise from the belief that the project or entity exists for no other reason than to benefit relatively few at the expense of the many.

Recent reports on community perceptions regarding the seafood industry have indicated that substantial proportions of the Australian public are concerned about the ethics, environmental impact and governance of industry (Alexander & Abernathy, 2019; Hobday et al, 2019; FRDC, 2017; Mazur et al, 2014). The typical response from industry has been to direct stakeholders and community towards information concerning their environmental, social and economic performance and product offering. However, simply presenting facts and technical arguments can fail to change opinions as many people have limited trust in industry and government reporting (FRDC, 2017; Quantum Research, 2018). This is of concern for the seafood industry which seeks respect, support and advocacy from its immediate stakeholders and the Australian public. To improve its standing requires industry to clearly understand and respond to community concerns and values. Incorrectly assuming our understanding is contemporary, complete and overlaps with community concerns carries inherent dangers. The ban on cattle exports to Indonesia in 2011 and the 2014 "supertrawler" ban, whereby the MV Margiris lost 18 000 tonne of allocated quota and was excluded from fishing in Australian waters for 2 years, are two high profile examples that clearly show how social licence of Australian industry sectors' can be eroded rapidly if industry acts in a way that conflicts with the Australian community sentiment.

To help improve industry's social licence, and achieve high levels of support from stakeholders and the Australian public requires clear definition of the values and behaviours industry is able to and prepared to deliver, and ways in which that can be tested and evaluated over time to maximise return for effort. Establishing a mechanism to facilitate this is the overall aim of this project.

1.2 Need

Despite considerable investment in RD&E to understand why the Australian seafood industry has been experiencing diminished levels of socio-political and community acceptability, there is still uncertainty regarding the significant values of different segments of the Australian community for coastal and marine systems, their management and industry participants(?) (Essence Communications, 2015). Further, there is evidence that the community's values and associated expectations are highly changeable and can have significant individual, business and national repercussions. While the seafood industry already operates from a strong values-based position of its own (where 'sustainability' is prioritised and regulated), there is evidence that the community's concerns include a range of other factors including animal welfare, supply chain integrity, and modern slavery (Essence Communications, 2015).

While clearly important, understanding community values and expectations alone is not enough. Industry must also articulate and demonstrate its commitments to addressing community expectations more effectively. This is critical to breaking the reactive negative cycle that threatens resource access, mental health and the viability of industry. A means of monitoring and tracking industry's success in responding to the community's changing expectations and values must also be developed.

Seafood Industry Australia's members have identified that maintaining and enhancing the social licence of the Australian seafood industry as being critical. This project is a tangible commitment to a national conversation and action to address community values. It is an opportunity to build seafood industry unity based on a set of shared values and supporting practices.

2. Objectives

The key objectives of the Our Pledge project have been to:

1. Identify values of major segments of the Australian community for fisheries resources and seafood industries, and expectations of industry behaviours that support those values
2. Identify values of the Australian seafood industry that are common across the industry at national and sector/regional scales
3. Establish industry response to community values and expectations, including measurable benchmarks of industry behaviours and performance that demonstrate commitment
4. Demonstrate and evaluate the effectiveness of a community engagement and communication strategy that is built on recognised shared values and commitment to supporting industry behaviours (Extension proof of concept – Australian Council of Prawn Fishers)
5. Increase capacity of industry's current and emerging leaders to engage in values- and- behaviours conversations with community leaders on an ongoing basis

During this project, Objective 4 was removed due to an alternative approach being adopted by the Australian Council of Prawn Fishers (ACPF) who were originally responsible for the delivery of this project component.

The ACPF originally worked with SIA and FRDC's HDR inside the FRDC 2017/242 project scope to construct values shared between the seafood industry and the community (Objective 2) and then to articulate how Australia's prawn fisheries should communicate its actions against shared values (Objective 3) with advice from consultancy firm Diplomacy. Subsequently, it became clear to the ACPF that Objective 4 required a much more significant budget and standalone project than what ACPF had invested for the task in FRDC 2017/242.

The ACPF requested variation of 2017/242 to achieve the following Objectives under FRDC/ACPF project 2018/172: "Methods to profile and connect the provenance of wild caught prawn fisheries and their values to the community":

1. Improve community acceptance of the wild prawn industry using fisheries based authentic stories addressing commonly held values (as described by Project 2017-242 Our Pledge) and relevant prawn RD&E initiatives
2. Implement engagement tools based on community behaviour insights that provide repeat and long-term connection with the community at points of community interaction
3. Build a database of engaged community members to which ACPF can communicate on its commitment and achievements against Our Pledge, to receive questions and feedback
4. Measure effectiveness of community engagement method through evaluation channels e.g. commissioned community evaluation

The project outputs were designed after an analysis of community behaviours and attitudes towards prawns (and the seafood industry) and the most effective channels to engage the community. A majority of the outputs were launched on 10 March 2020 and are housed at <https://www.australianwildprawns.com.au/>. The effectiveness of engagement in each of the channels selected (not yet completed) will be analysed and reported on project completion in

December 2020. As of April 2020, the project team could see early response results (social media view rates and engagement) that confirmed the community's interest in what the seafood industry cares about. The following video footage <https://www.australianwildprawns.com.au/what-we-care-about/> was designed to sit underneath respective "Our Pledge" statements and utilises ACPF and its member's RD&E project activities (listed below) as evidence of adherence to shared values.

- Partners in Sustainability
- Prawn fishers innovate to reduce bycatch
- Provenance, Trust and Transparency
- Our People. Our Values
- We live for the Wild (a summary overview of these commitments)

3. Method

The process of better understanding community values, undertaking a national conversation within the seafood industry regarding community expectations, and developing a tangible value statement and commitment to action was undertaken using the stepwise approach described below. This approach has been summarised in Figure 1.

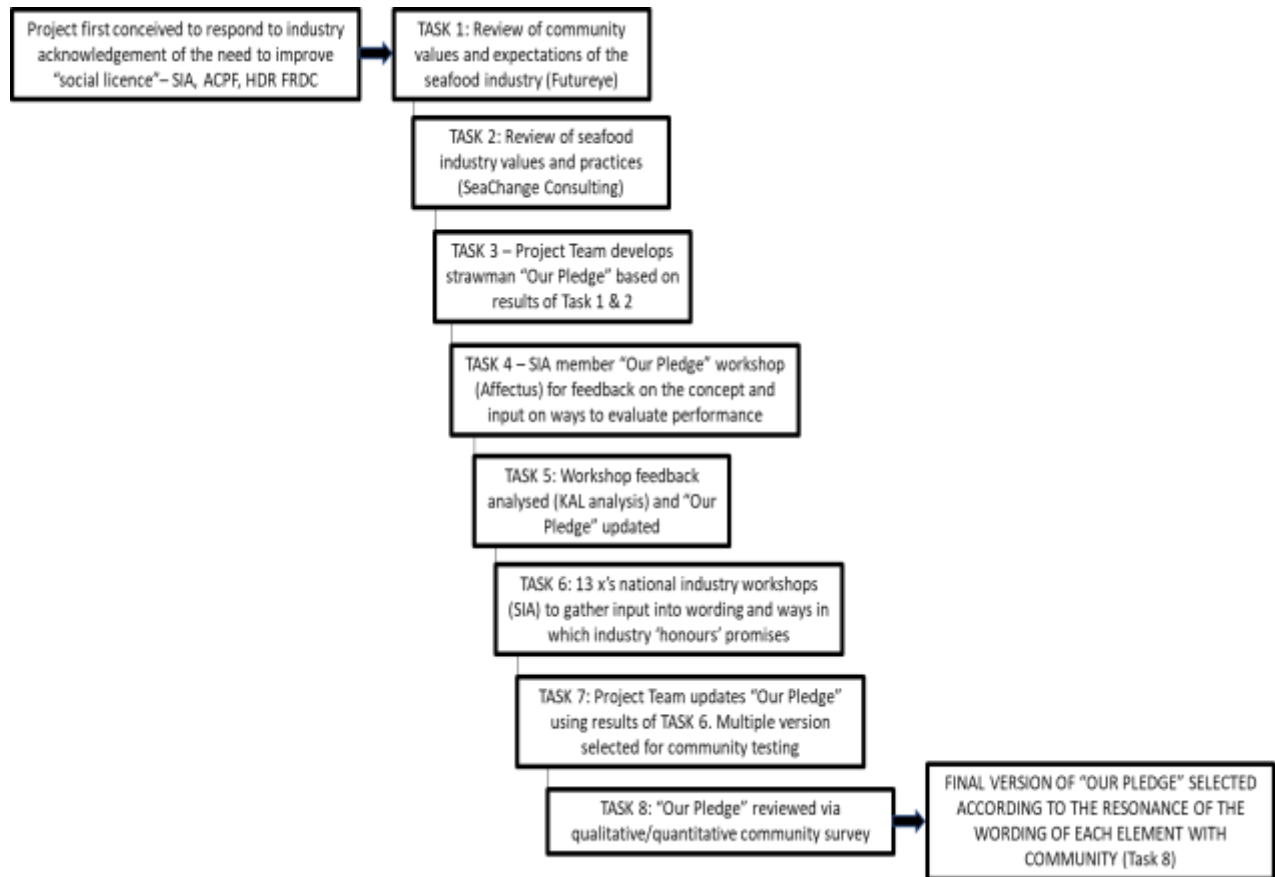


Figure 1 - The "Our Pledge" development process

Methods used to collect data and information used to inform the national conversation included desktop review, interviews and surveys. The outputs from these preliminary investigations were reviewed by a large, diverse stakeholder group during a series of workshops in order to reach consensus on an industry statement (referred to as "Our Pledge") that represents core values and its commitment to honouring ethics and practices that are shared by both industry and community alike.

3.1 Identifying community values and perceptions of desirable industry practices

In order to understand society's current values and expectations about the industry, SIA commissioned Futureye Pty Ltd, a community engagement and research consultancy, to review existing research into community attitudes. This review also included other market research with a focus on primary data collected through population-wide surveys on community values undertaken since 2014. Then based on the review of this information, provide recommendations that can inform a highly effective charter or promise. To validate results of

this review, the findings were reviewed against similar research Futureye had undertaken for individual industry participants, as well as for the Northern Territory Seafood Council.

The research reviewed is detailed within the research report (Appendix A).

3.2 Review of industry values and practices

A rapid analysis of the most common Australian industry values and underpinning behaviours (practices) was undertaken by Sea Change Consulting Australia by reviewing values statements and recorded practices of 52 seafood organisations.

The 52 organizations selected included peak bodies and industry representative organizations, (including FRDC IPAs) and businesses, which included producers, wholesale, processing, retail, restaurant, and vertically integrated businesses across the supply chain. The SIA membership was used as the base, but some additional relevant organizations were added. Not included were organizations focused on training, consulting, marketing/sales advising, transport, fish feed, or overseas organizations. Only those organizations with websites were used. The final list of organizations was agreed with SIA. While not a statistically representative sample of Australian seafood organizations, the list was considered to be extensive enough in order to cover most sectors and scales of the Australian seafood industry.

Using the organisation's website text (e.g. "about us"), strategic documents, newsletters and media releases, 'Values Statements' were extracted. Statements of values were not necessarily only values (i.e. moral principles, beliefs or standards), but encompassed 'the things that are important' to the organisation. These were often referred to as 'goals', 'mission', 'objectives', 'principles', 'strategic focus/priorities', 'vision', or 'values'. Using the organisation's website text, newsletters, media releases and recent annual reports, 'Practices' were also extracted. These were treated as evidence that the organisation was putting their 'Values into action', and it could be argued that actions and practices carry more weight than what Industry's stated 'Values' are.

In total, 1014 Values Statements and Practices were analysed (571 Values Statements, 443 Practices). Each Values Statement and Practice was coded using a grounded theory approach (Strauss & Corbin, 1997) given the research was exploratory. Each value statement and practice were given a code (category) name (e.g. 'to be a united industry'), then these initial codes were amalgamated into broader codes. This iterative coding approach was repeated and refined until there were as few codes as possible, without losing important detail. This resulted in a total of 43 codes for all the Values Statements and Practices.

The analysis presented here is very simple and calculated the percentage of organizations who made the coded Values Statement, and the percentage of organizations who showed evidence of practicing the Stated Value (see Table 1). The analysis used 'presence or absence' of the existence of the Value/Practice in an organization rather than determining whether any values or practices were a priority of the organization, as any weighting of the values/practices by organization was beyond the scope of the project. The raw numbers of organizations that demonstrated a Value/Practice could have been used and this was discussed with SIA, but was decided that percentages would be suitable for the audience and would clearly show which Values/Actions were most commonly shared by the sampled seafood organizations. The data were categorized by Industry type (Wildcatch and/or Aquaculture) and by organization type (Industry Association or Business) and examined for differences.

As this research was intended to be used to develop a 'charter or promise' to demonstrate the industry's intent to earn its social licence to operate it was concluded that due to the availability of evidence that supports effort and performance regarding practices as opposed to values, shared practices are more useful to help develop Our Pledge.

The full research report has been included as Appendix B.

Table 1: The percentage of sample organisations who have publicly stated the coded 'Values' and reported evidence of 'Practices' in alignment with stated values

Coded value	Values % (n=43)	Practices % (n=39)
Sustainability of the environment and natural resources, "pristine environment"	88	82
Providing high quality/fresh/tasty products	60	38
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	56	72
Connecting to, and meeting expectations of consumers/customers	44	44
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	40	46
To be a strong voice/advocate, demonstrate leadership and influence	40	13
Innovative, modern and technologically advanced	30	26
Economic importance and sustainability including employment	30	26
To build industry and organisational capacity, provide professional development	28	36
Connecting to, and serving communities	26	31
To be active in research and collaborate with researchers and students	26	33
Sharing information (about the industry, business, products)	23	36
Maintaining and increasing productivity, performance and reliable/consistent supply	23	13
Supporting family/multigenerational/small businesses	21	15
Healthy seafood	21	5
Transparency, honesty, open communication	21	8
The importance of the culture of the industry (livelihoods, history, cultural connection)	21	10
Demonstrating (and being recognised for) the contribution the industry makes	21	15
Strong biosecurity, food safety and handling	19	26
To enhance market opportunities	19	21
Profitability	16	13
To be a united industry/workforce	16	8
Securing access to resources	16	13
To engage in fisheries/aquaculture management and policy processes	14	36
Pride and passion for what we do	14	5
Professional	14	3
Health and safety of people working in the industry	12	28
Traceability	12	10
To act with integrity	12	3
To act ethically	12	3
To act with respect	12	3
To have and build a positive reputation	12	0
Sharing access to the environment space	12	8
Locally produced seafood/provenance	9	26
To be trusted	9	5
Belief in research/science/evidence to support decision-making	7	10
Efficiency	7	3
Good governance	7	3
Food security	7	0
Support, encourage and respect the diversity of the industry	5	10
Adapting to environmental change	5	3
To be accountable	2	5
To self-regulate	2	3

3.3 Determining industry response to community values and expectations

The draft industry 'charter or promise' to demonstrate the industry's intent to earn its social licence to operate or strawman "Our Pledge" , along with evidence of both alignment and misalignment in practices, was drafted for testing at industry workshops.

The data collected in Tasks 1 and 2 was used by the project team at a Technical workshop (19 September 2018, Canberra) to develop a first draft of "Our Pledge". The draft - a vision statement and set of scripted industry commitments - was developed to represent a draft set of Australian seafood industry values, industry-community shared values, and supporting practices based on findings of Tasks 1 and 2 (Appendix A and B).

At the workshop, values as identified in both pieces of work (Tasks 1 and 2) were examined and compared to identify clusters of themes of values that occurred in both. These clusters were then simplified to single statements to capture the cluster of values in that theme.

The draft "Our Pledge" was the subject of an SIA Members' Forum, 27 September, Brisbane, where SIA members to provide feedback on the concept and details of "Our Pledge". Prior to the workshop attendees were provided with background information on the aims of the pledge and questions to consider.

The draft version of Our Pledge taken to this workshop was:

We want to continue to put great Australian seafood on the table for you and for everyone into the future, in ways you are proud of.

This is our pledge to you:

- *We actively care for Australia's oceans and environment. We work with and encourage others to do so as well.*
- *We care about the animals we interact with and treat them with respect*
- *Our people are important. We look after them and keep them safe.*
- *We do not condone illegal activities.*
- *We will keep looking for ways to do things better.*

We are a part of the community. We pledge to listen to and respect your concerns.

Linkages of the Our Pledge elements relative to community concerns were discussed (Table 2) and participants provided examples of how Our Pledge elements could be demonstrated.

Feedback from the Members' Forum was analysed and reviewed with Kate Brooks (KAL Analysis), and the results of the analysis were used to develop an updated version of "Our Pledge" that encapsulated industry values and its response to community values and expectations.

Table 2: Information linking Our Pledge elements to community concern used to support the national workshop 27 September 2018

Pledge element	Scope	Responds to community concerns
<i>We are a part of your community. We pledge to listen to and respect your concerns.</i>	Contributing to community Listening to the community Indigenous engagement Engage and build relationships Our Pledge is primarily domestic audience - centre of the bell curve - the “average joe”	Ensure that community engagement becomes an important element of strategy formation and execution There are concerns members within the industry do not care about the community and will willingly confront those who challenge the industry. General concern regarding the lack of indigenous involvement in the fishing industry.
<i>We depend on and care for the environment, and we pledge to actively minimise our impact and encourage others to do so too</i>	Pollution – plastic Habitat maintenance and restoration Reef Advocate for action from other users	Ensure sustainability of fishing stock and habitat protection is a primary focus Belief that trawling has the capacity to significantly damage habitats and impacts biodiversity and environmental sustainability. There is a perception that pollutants from aquaculture leech into the water table, presenting an environmental risk. Similarly, there are concerns that pollutants from fish farms damage the immediate environment.
<i>Abundant fish-stocks are important to us all and we pledge to safeguard tomorrow’s fish-stocks today.</i>	Sustainable resource use Overfishing concerns, including fishing beyond allowed limits	Ensure sustainability of fishing stock and habitat protection is a primary focus Acknowledge environmental concerns and commit to transparent investigation and mitigation of these issues
<i>Our people are important, and we pledge to look after them and keep them safe.</i>	Health and safety Mental health People development Livelihood Modern Day Slavery	There is a perception that some vessels are unsafe and that physical injury rates are seen to be too high. There is also concern that the fishing industry is rife with bullying, causing widespread mental health issues.
<i>We care about the welfare of fish and we pledge to treat them responsibly.</i>	Animal welfare Fish we farm Fish we catch Animals we interact with TEPS	Bycatch and discards, trawlers and other fishing vessels catch wildlife such as seals and dolphins in their nets causing injury or death Depth trauma, there are concerns about cruelty in the industry such as crushing fish at the bottom of nets when raised too quickly.

Based on this feedback, a revised version of “Our Pledge” was drafted and subsequently tested at a series of workshops held across Australia. The draft version was worded as follows:

We are the Australian seafood industry and we are committed to putting great local seafood on your table now and for generations to come.

To ensure we do this in ways we are all proud of, we promise to:

- *actively care for Australia’s oceans and environment and encourage others to do the same*

- *value our people, look after them and keep them safe*
- *respect and care for the animals we interact with*
- *not condone illegal activities*
- *listen to and respect community concerns and*
- *keep looking for ways to do things better*

This is our pledge to you.

Our Pledge industry workshop and review process details

The process used for developing and finalising Our Pledge is outlined in Figure 1 and described in further detail below. The number of people involved in the review and refinement process (excluding the Project team) are detailed in Table 3.

Table 3: “Our Pledge” industry workshop location, dates and numbers of people in attendance

Our Pledge industry workshop locations and dates	Attendees
Seafood Industry Australia Members Forum, Qld (27 September 2018)	150
National Seafood Marketing Symposium, Qld (28 September 2018)	300
Woolworths Sustainability Specialist and Seafood Buyer, NSW (15 October 2018)	10
Seafood Industry Victoria AGM, Vic (22 October 2018)	20
National Seafood Industry Leaders Program “late” course, ACT (25 October 2018)	30
Australian Fisheries Management Authority Commissioners meeting, NSW (31 October 2018)	15
Wildcatch Fisheries SA (9 November 2018)	14
Marine Stewardship Council, WA (14 November 2018)	5
Abalone Association of Australasia, Vic (15 November 2018) - AAA	25
Australian Southern Bluefin Tuna Industry Association, SA (27 November 2018) - ABSTIA	50
Spencer Gulf Prawns / Clean Seas, SA (27 November 2018) - SGPA	10
Western Australian Fishing Industry Council, WA (29 November 2018) - WAFIC	15
Victorian Fisheries Authority, Vic (1 February 2019) - VFA	15
NTSC, NT (20 February 2019)	17
Sydney Fish Market, Sydney (28 March 2019) - SFM	17
Tasmanian Seafood Industry Council, Tas (12 April 2019) - TSIC	13

Mackay, Qld (9 July 2019)	13
Geraldton Fishermen's Cooperative, WA (25 July 2019) - GFM	15
Australian Mariners Welfare Society subcommittee, WHERE (31 October 2019)	14
Newcastle, NSW (18 August 2019)	14
Melbourne Seafood Centre, Vic (19 August 2019)	11
National webinar (28 August 2019)	19

The Our Pledge review and refinement process

This draft version of “Our Pledge” was workshopped around Australia to gauge seafood industry support and to gather feedback on:

- improvements to the wording
- recommendations concerning amendments or deletions
- ways in which the seafood industry can demonstrate commitment / compliance to “Our Pledge” statements.

Workshops to review the draft were conducted using industry association and cooperative facilities in all States and Territories of Australia excluding the Australian Capital Territory, and via a single online webinar. Industry members were made aware of the opportunity to participate in workshops via the distribution of online flyers and workshop announcements through Seafood Industry Australia membership networks (which includes most of the industry state and fisheries-based associations and their networks). All seafood industry members were invited to take part (i.e. workshops were not held exclusively for Seafood Industry Australia members).

Prior to the workshop, attendees were issued with a “primer” document, which included a brief on the project, to ensure they were familiar with the Our Pledge commitment and the reason for its development (Appendix C).

During workshops, an overview of the rationale supporting the development Our Pledge (i.e. an explanation of the importance of seeking and proactively responding to community sentiment in order to maintain a social licence to operate) preceded a discussion about the relevance, wording and evidence supporting Our Pledge.

A register of support for Our Pledge (Table 4) and a summary of suggestions for regarding rewording of the Our Pledge statements (Table 5) were collated and used to update the wording of Our Pledge.

Table 4: Summary of industry workshop feedback – part A

Statements	SGPA	GFC	ASBTIA	WAFIC	NTSC	SFM	VFA	TSIC	Mackay	Newcastle	Melb	Webinar	Total	% positive provided
We are the Australian seafood industry and we are committed to putting great local seafood on your table now and for generations to come.	3	5	10	7	10	8	3	10	7	9	6	1	79	100
actively care for Australia's oceans and environment and encourage others to do the same	3	5	10	7	10	8	3	11	7	6	8	1	79	100
value our people, look after them and keep them safe	3	5	10	7	10	4	3	11	7	6	7	1	74	100
respect and care for the animals we interact with	2	5	10	7	10	1	3	10	7	6	7	1	69	97
not condone illegal activities	3	4	8	7	10	4	3	9	7	7	8	1	71	95
listen to and respect community concerns and	3	4	10	7	10	2	3	11	6	8	9	1	74	95
keep looking for ways to do things better	3	5	10	7	10	5	3	9	7	7	8	1	75	100

Table 5: Summary of industry workshop feedback – part B

Statements	most common suggestions	alternative 1	alternative 2	alternative 3
We are the Australian seafood industry and we are committed to putting great local seafood on your table now and for generations to come.	"best seafood", "safest, highest quality", "healthy/sustainable/renewable", "for your families"	replace "local" with "Australian"	replace "great" with "best" / "sustainable"	replace "your table" with "your family's table"
actively care for Australia's oceans and environment and encourage others to do the same	"proactively", "protect", "inspire others", "continue", "sounds too preachy, we rely on the environment and must care/protect it, we align with others", change oceans to "waterways", get rid of "and actively encourage others to do the same", "sustainability", "coastlines"	"proactively" care for Australia's oceans and environment and encourage others to do the same	actively care for Australia's [oceans and environment/"coastlines and waterways"] and encourage others to do the same	actively care for Australia's oceans and environment and encourage others to do the same "which we rely on, and work with others to do the same"
value our people, look after them and keep them safe	"care for", add "to return to their families at the end of the day", "Ensure our people are valued and safe", better as a safety message, as the 'value' bit suggests wages, "committed to looking after them"	value "look after" our people, look after them and keep them safe	value "care for" our people, look after them and keep them safe	value our people, look after them and keep them safe "to come home to their families"
respect and care for the animals we interact with	Get rid of "respect and", get rid of "care", replace with "treat the animals we interact with respectfully", "humane", "respect the marine life, care for their habitat and the environment from which they come to ensure future supply. Act humanly." "act in a humane way", "respect" is good	"treat the animals we interact with respectfully and humanely"	respect and care for "treat humanely" the animals we interact with	

not condone illegal activities	worded more positively, "fight", "supporting effective compliance of regulations" "transparent processes", "Not condone illegal activities and move to call out bad practices in the greater industry", "Keeping each other OR industry transparent/accountable", "how do we hold ourselves to account", "we uphold rules and regulations"	not condone "fight" illegal activities "and keep our industry/each other transparent and accountable"	"uphold rules and regulations" and "keep each other transparent and accountable"	Not condone illegal activities and "call out bad practices in our industry"
listen to and respect community concerns	"interests", "carry community values", "listen to and respond to community concerns", replace 'respect' with "act on" or "engage with", "collaboration with rec/indigenous/commercial/consumer"	listen to and respect community concerns "interests"	listen to and respect "engage with" community concerns	listen to and "respond to" respect community concerns "interests"
keep looking for ways to do things better	Keep "evolving and doing" things better; "proactively", "be proactive for a better future", "trust, custodians and transparency", "always", "always seek ways to improve", "Include traceability and transparency", "striving", add "as an industry"	keep "evolving and doing" looking for ways to do things better	"strive" keep looking for ways to do things better "as an industry"	"be proactive for a better future"

On completion of the workshops, feedback was analysed and there was broad support for the elements of “Our Pledge”, a suite of suggestions for alternate wording but no clear need to remove or add to the general scope of the document (Table 5).

The feedback from the workshop and stakeholder consultations were positive towards the concept and the general issues covered by “Our Pledge.” Some modification of wording was suggested, with one element - “not condone illegal activities”- being identified by every group as requiring rewording.

An extension to the project design to test the penultimate version of “Our Pledge” with the community was undertaken by Essence communications through focus groups. The focus groups were used to evaluate the effectiveness of a community engagement and communication strategy thus addressing in part outcomes detailed under Objective 4 of this project. By combining the community focus group component, funded through this project, with a community sentiment survey, funded through an Australian Government grant program, “Marketing the Australian seafood industry – demonstrating our commitment to long-term sustainability and environmental responsibility”, efficiencies were gained and a more detailed analysis of community response was obtained.

“Our Pledge” was then finalised by the project team by incorporating feedback described within the community sentiment survey report (Appendix D) with the intent of using it as a mechanism to communicate the values, commitment and supporting practices of industry to the Australian community for the purpose of accountability, transparency and improvement purposes.

3.4 Increase capacity of industry's current and emerging leaders to engage in values-and- behaviours conversations with community leaders on an ongoing basis

The project was designed to enable widespread and ongoing consultation with a range of leadership groups, which was required to refine and finalise Our Pledge. This in turn would help address the capacity building project objectives. Specific capacity-building activities included:

- Industry workshops to review and refine draft values and supporting practices as relevant for national, regional and sector scales (coordinated by representative organisations in each State/Territory)
- Collaboration with National Seafood Industry Leadership Program members of the first 2018 intake to review and refine draft values and supporting practices within their sectors
- Meetings with SIA members to review and refine draft values and supporting practice

All these activities were completed during the course of the project.

4. Results

Results are categorised under this Project's three main topic areas:

1. Identifying the values of major segments of the Australian community for fisheries resources and seafood industries, and expectations of industry behaviours that support those values
2. Identifying the values of the Australian seafood industry that are common across the industry at national and sector/regional scales
3. Determining industry response to community values and expectations

For all sections, additional detailed information is provided in the referenced Appendices.

4.1 Identify values of major segments of the Australian community for fisheries resources and seafood industries, and expectations of industry behaviours that support those values

Findings from the review and synthesis into society's values and expectations of the Australian seafood industry were presented in a short report (Appendix A). The review identified that primary concerns about the fishing industry raised by the community relate to environmental sustainability and industry and government accountability. The synthesis of previous research concluded that the most critical issues affecting the community's views of, and concerns about, Australia's seafood industry should be the focus of the charter or promise. It was therefore recommended that the charter should reflect the industry's commitment to:

- Ensure that sustainability - fishing stocks and habitat - is the primary focus of the promise or charter.

Sustainability is the key positive value the community is seeking from the industry. A trend of increased community concern for sustainability over time was observed in the sampled literature. Additionally, there was a related concern that there may be insufficient accountability to ensure industry is genuinely complying with science and government regulations to ensure sustainable practice.

- Ensure that accountability for industry participants who 'break the rules' is a major element of the charter.

The findings indicated that community believes strong government action and a strict regulatory environment are critical to ensure genuine industry focus on improved stock and environmental sustainability.

The literature also highlighted heightened community awareness about the sustainability of fish stocks globally, and the perceived ill effects of 'super trawlers' and overfishing. These issues affect the community's view of the Australian industry and capacity for sustainability and environmental impact mitigation.

- Ensure that community engagement becomes an important element of strategy formation and execution.

A key observation from the literature was that increased public awareness of industry operations, participants, systems, and commitment to community engagement appeared to coincide with increased appreciation for sustainability efforts. Understandably, the less familiar

people are with the issues, the more likely they are to be cynical that the industry's commitments are genuine.

While addressing the potential of aquaculture and fish farming to reduce reliance on wild harvest and overfishing, the industry must acknowledge environmental concerns and commit to transparently investigate them and provide solutions to mitigate the adverse effects.

The community is aware of the views of highly involved critics, such as Greenpeace, and their concerns about aquaculture. While critics acknowledge that fish farming may play an important role in reducing pressures on natural fish stocks, they are concerned about the environmental and other effects of intensive farming methods. Examples include the transmission of viruses and disease, and harmful effects of pollution on the environment.

- Acknowledge that the community is cynical about valuing the economic contribution of industry over concerns about its operations and impacts.

Increasingly, the community is more concerned with sustainability than with supply or the economic benefits of the industry to Australia. A focus on 'benefit-selling' therefore undermines the industry's credibility regarding its commitment to the environment and sustainability.

4.2 Identify values of the Australian seafood industry that are common across the industry at national and sector/regional scales

Comparisons of industry values and practices undertaken by Sea Change Consulting Australia highlighted several discrepancies between what seafood organisations valued versus practiced. These discrepancies were also observed between organisational groupings – i.e. Peak body/Industry Association, or business, wild catch focussed or aquaculture focussed (Tables 6 & 7). The results of the analyses are summarised in 'The Pledge Report' (Appendix B).

Table 6: Observed similarities (highlighted in blue) and differences (highlighted in red) between the stated Values and Practices of seafood industry peak bodies and associations, expressed as percentages (%)

Values	% Peak Bodies/Associations (n=25)
Sustainability of the environment and natural resources, "pristine environment"	92
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	64
To be a strong voice/advocate, demonstrate leadership and influence	60
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	56
Providing high quality/fresh/tasty products	44
Economic importance and sustainability including employment	44
To build industry and organisational capacity, provide professional development	40
Sharing information (about the industry, business, products)	36
Demonstrating (and being recognised for) the contribution the industry makes	36
To be active in research and collaborate with researchers and students	36
Transparency, honesty, open communication	36
Connecting to, and meeting expectations of consumers/customers	32
Connecting to, and serving communities	32
To enhance market opportunities	32
Profitability	28
Securing access to resources	28
Practices	% Peak Bodies/Associations (n=23)
Sustainability of the environment and natural resources, "pristine environment"	78
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	61
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	48
Connecting to, and meeting expectations of consumers/customers	48
To build industry and organisational capacity, provide professional development	43
Sharing information (about the industry, business, products)	43
To be active in research and collaborate with researchers and students	39
To engage in fisheries/aquaculture management and policy processes	39
Strong biosecurity, food safety and handling	39
To enhance market opportunities	35
Economic importance and sustainability including employment	26
Demonstrating (and being recognised for) the contribution the industry makes	26
Locally produced seafood/provenance	26
Health and safety of people working in the industry	26

Table 7: Observed similarities (highlighted in blue) and differences (highlighted in red) between the stated Values and Practices of seafood industry businesses, expressed as percentages (%)

Values	% Businesses (n=18)
Sustainability of the environment and natural resources, "pristine environment"	83
Providing high quality/fresh/tasty products	83
Connecting to, and meeting expectations of consumers/customers	61
Innovative, modern and technologically advanced	56
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	44
Supporting family/multigenerational/small businesses	33
The importance of the culture of the industry (livelihoods, history, cultural connection)	28
Healthy seafood	28
Pride and passion for what we do	28
Practices	% Businesses (n=16)
Sustainability of the environment and natural resources, "pristine environment"	88
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	88
Providing high quality/fresh/tasty products	63
Innovative, modern and technologically advanced	44
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	44
Connecting to, and serving communities	44
Connecting to, and meeting expectations of consumers/customers	38
Health and safety of people working in the industry	31
To engage in fisheries/aquaculture management and policy processes	31
To build industry and organisational capacity, provide professional development	25
To be active in research and collaborate with researchers and students	25
Economic importance and sustainability including employment	25
Sharing information (about the industry, business, products)	25
Locally produced seafood/provenance	25

Despite these inferred differences, there are several similarities in the values and practices of organisations identified which were used to analyse alignment with societal values and expectations of the industry. Key results extrapolated from the research are as follows.

Key Values that are common regardless of the type of organisation or sector are:

- The sustainability of the environment and its natural resources is paramount, and our seafood is sourced from a pristine environment
- The industry is committed to responsible practices and stewardship, and will continue to improve
- The industry provides high quality, fresh and delicious seafood

Key Practices that are common regardless of the type of organisation or sector are:

- The sustainability of the environment and its natural resources is paramount, and our seafood is sourced from a pristine environment
- The industry is undertaking responsible practices and stewardship, and is committed to improving
- The industry strives to connect to and meet the expectations of seafood consumers and customers
- The industry values collaboration, engagement and their relationships with stakeholders, government, businesses and communities
- The industry is committed to sharing information about the industry, business, and products
- Building industry and organisational capacity, and provide professional development

4.3 Determining industry response to community values and expectations

Comparing research results for community values and expectations of the seafood industry with those for values and practices of the seafood industry revealed that the following values and practices were highlighted ubiquitously important:

- environmental sustainability
- responsible practices and stewardship
- quality product
- striving to connect and meet expectations of seafood consumers, customers and communities
- desire to collaborate, engage and have positive relationships with stakeholders, government, businesses and community
- commitment to sharing information about the industry, businesses and products

Given the many similarities between community concerns and stated industry values and practices, it was assumed that areas of potential misalignment were minimal and likely related to semantics.

The research by Essence Communications (Appendix D) identified 16 key findings in relation to community sentiment towards Australia's Seafood Industry and in evaluating the opportunity for Our Pledge:

- There appears to be a good understanding of ethical practice and what this means
- There is low awareness of the Australian seafood industry and how it operates

- There are mixed perceptions of the seafood industry and its focus on ethical and sustainable practice
- Those who know more about the seafood industry, who buy Australian seafood and who consume seafood regularly are more positive
- “Our Pledge” offers a good opportunity to further enhance perceptions and community understanding of the seafood industry
- The commitment made in “Our Pledge” must be clear and concise
- There are high expectations when it comes to caring for the environment
- Participants agree that primary producers and workers should be looked after and their sense is that they are
- Having regard for animal welfare is viewed positively
- The opportunity is to promote transparency and accountability when it comes to complying with the law
- Participants value a level of responsiveness to community concern about how the industry is behaving
- Continuous improvement is viewed as being essential to identifying ways to do and be better
- Stories about the industry, its people and how it works would be highly regarded
- Expectations of proof that the industry is living “Our Pledge” reflects the areas of importance: environment, respecting animals and sustainability
- The role of Marine Parks is relatively unknown
- “Our Pledge” has the potential to positively influence seafood buying behaviour.

It was also concluded from the community sentiment survey research that Our Pledge has the potential to provide a strong and engaging message about the Australian seafood industry and the work it is doing as responsible and environmentally focussed primary producers.

The results of the survey were used by the project technical team/steering group to finalise the phrasing of Our Pledge, as follows:

We are the Australian seafood industry and we are committed to putting the best Australian seafood on your table now and for generations to come.

To ensure we do this in ways we are all proud of, we promise to:

- *actively care for Australia’s oceans and environment and work with others to do the same*
- *value our people, look after them and keep them safe*
- *respect the seafood we harvest and the wildlife we interact with*
- *be transparent and accountable for our actions*
- *engage with the community and listen to their concerns and*
- *continually improve our practices*

This is our pledge to you.

A final digital version of Our Pledge was also created and launched to industry in late October.

The community sentiment survey was designed with the intent of repeating the survey process annually to track changes in community support for industry over time. Examples of how the industry can demonstrate commitment to/compliance with “Our Pledge” statements were

gathered (i.e. as part of Objective 3; Table 8). However, it was apparent that to be able to complete the first “stocktake” of industry performance against “Our Pledge” and develop methods for supporting ongoing industry benchmarking and monitoring of its performance and community acceptability, more detailed investigations to identify, collate and evaluate evidence that aligns with the commitments stated within Our Pledge is required. Issues related to difficulties in achieving Objective 3 and ways in which these will be achieved are detailed within the discussion.

Table 8: Consolidated list detailing industry monitoring organisations/programs that can be used to evaluate Our Pledge performance

Our Pledge statement	Performance measure/activity
We want to continue to put great Australian seafood on the table for you and for everyone into the future, in ways you are proud of	Status of Australian Fish Stocks (SAFS) that assess stock status Regulations and legislation that concern industry performance AFMA reports on industry sustainability State fisheries agencies
We actively care for Australia’s oceans and environment. We work with and encourage others to do so as well	Partnerships with OzFish Unlimited, supermarkets, eNGOs (Nature Conservancy), NRMs (OceanWatch) (Participation in) Clean up Australia Day Habitat restoration Bycatch reduction (through alternate gear adoption) Eyes at sea – encouraging improved practices from other users Landcare for on shore activities
We care about the animals we interact with and treat them with respect	Bycatch management Humane handling using best practices Animal Welfare workshop outcomes.
Our people are important. We look after them and keep them safe	Mental health support, i.e. StayAfloat Career progression Training and development, i.e. SeSAFE AMSA incident reporting and improved SMSs Coroners reports – learnings from them
We do not condone illegal activities.	AFMA and AMSA highlighting prosecutions Industry calling out illegal behaviour SIA media releases for reported illegal activity
We will keep looking for ways to do things better.	FRDC projects relevant to industry needs Relationships with universities Innovation of processes and practices
We are a part of the community. We pledge to listen to and respect your concerns.	Regular outreach/engagement with the community, eNGOs, politicians Explain the great things we are already doing (Hosting) seafood festivals Be alert to emerging community concerns and work with community on issues (e.g. habitat restoration)

Discussion & Conclusion

Considerable research has previously examined how to influence and improve social licence, including barriers to uptake and how to overcome them (Alexander & Abernathy, 2019; Davies, 2019; Mazur & Brooks, 2018; Ogier & Brooks, 2016). Evidence suggests many tools previously developed, such as the guide to planning and implementing engagement strategies (Mazur et al, 2014), and the 'licence to engage' framework for gaining and retaining social licence (Ogier & Brooks, 2016) have elicited only limited or fragmented uptake by industry (Mazur & Brooks, 2018) or measurable impact in regards to improvement in social licence to operate. This may be due in part to the fact that until this point industry has lacked a mechanism under which to consolidate its strategy and goals and communicate its progress towards greater alignment and responsiveness to community values and demands in a way that community and stakeholders easily relate to and understand.

This project was developed in order to produce a community engagement and communication strategy and mechanism that can be used to build social licence at an industry scale, that is representative of the diverse national seafood industry, and that is effective in relating to and responding to stakeholder and community concerns. Actions that align with these outcomes should build trust and ultimately support for the seafood industry, and enable its growth, prosperity and continued contribution to society into the future.

Our Pledge was developed to provide the desired mechanism. Its effectiveness in assisting industry responses to stakeholder and community interests in a consolidated and targeted manner will require monitoring and assessment over time. Our Pledge was formulated by synthesizing current understanding on contemporary community values and expectations regarding how the seafood industry should behave with research into industry values and practices. The message and commitment contained within Our Pledge resonates well with community sentiment, as can be seen in the results of the community sentiment survey, thus providing evidence that the messaging is on point.

What is apparent from the community sentiment survey is that Our Pledge will only be effective if there is evidence that industry commits to it and holds itself accountable to this set of values but also continues to monitor community values, and respond accordingly as they change. The findings from the community sentiment survey state that the participants generally view the seafood industry positively but know little about it. However, they are interested in knowing more. They want the seafood industry to perform strongly in the areas of environmental impact, sustainability and respecting animals and wildlife. The path to industry accountability to Our Pledge is via the formation and articulation of clear goals that align with community values and expectations, coupled with an ongoing clear and engaging process of reporting regarding progress towards these goals that is made publicly available.

A critical step to allow effective monitoring and communication of progress is the development of measurable benchmarks of industry behaviours and performance. These must demonstrate commitment and increasing capacity of industry's current and emerging leaders to engage in values and behaviours conversations with community leaders on an ongoing basis. Although some ways in which Our Pledge element can be demonstrated and evaluated were identified (Table 8), no specific goals or outcomes related to each element that are representative of the entire seafood industry were formally agreed upon. This objective was therefore not achieved during this project due to the considerable effort required to reach agreement on the values represented within Our Pledge and the complexity of consolidating performance measures and an evaluation framework that can be applied to the diverse and non-uniform Australian seafood industry. This task has been undertaken by a related project funded through an Australian Government grant program, "*Marketing the Australian seafood industry – demonstrating our commitment to long-term sustainability and environmental responsibility*".

Notwithstanding this, Our Pledge is a validated and representative values statement upon which industry can base strategy and actions that, if effective and well communicated, have potential to positively influence social licence and unify industry. If industry commits to Our

Pledge and collectively acts in ways that are quantifiable and can be linked to Our Pledge elements the impact of those actions can be amplified at a national level via industry associations and peak bodies. The singular and focussed messaging within Our Pledge can then be used to provide large segments of the Australian public with a greater understanding and appreciation of the effort being applied by industry to address their interests and concerns.

The capacity of industry to engage in values and behaviours-focussed conversations with community leaders has been recognised as requiring improvement and is an ongoing focus of FRDC and SIA. Industry has the ability to start these conversations now and has the tools required at its disposal however meaningful conversations will become easier and more focussed if industry can work towards identifying and ratifying common goals that are shared by community, and then validate effort and progress towards achieving these goals. All of which has been shown to positively influence social licence over the long term.

Implications

Our Pledge provides a conduit for framing conversations about the commercial industry's response to community concerns that can be supported by key performance indicators (benchmarks) and case studies/stories.

Its value can be measured through monitoring over time. However, this is the first time the shared values and practices of the entire professional seafood industry that spans wild caught, aquaculture and post-harvest sectors have been collated and presented in non-scientific and non-technical language for a national audience in order to help facilitate a two-way conversation regarding the future direction and responsibilities of industry. As detailed previously, a two-way conversation requires commitment, transparency and accountability to shared values and practices, engagement with stakeholders and the public to gather feedback and involve them in important decision-making regarding issues that matter to all parties.

The extensive testing of the concept of Our Pledge and has resulted in the production of a mechanism that has broad industry and community appeal that can be used to support dialogue, accountability and the extension (uptake) of a number of other tools and resources already developed to improve social licence. It also provides a mechanism to streamline future research and development and industry related data collection into categories that can easily be related to tangible outcomes.

Encouraging current and emerging leaders to engage in these conversations will play a large role in effectively testing this resource. Success will be heavily reliant on incorporating community feedback into decision making and responsiveness when shaping future initiatives designed to influence social licence. Drawing from numerous case studies (Ogier & Brooks, 2016), authentic demonstration of commitment to Our Pledge using engaging and entertaining narratives and stories backed by evidence and fact to respond directly to community interests using sound communication strategies will be key to evaluating the effectiveness of initiatives designed with this purpose in mind.

Recommendations

The original aim of this project was to produce and test a mechanism that could be used across all sectors of the seafood industry as a tool for building long standing relationships with community based on trust that improve social licence. The mechanism, Our Pledge, was developed but the pilot test of this mechanism has been delegated to a different project.

The following five recommendations have been developed to help others test and extend this project and have been formed using conclusions drawn from this project and from recent literature related to social licence that have been tailored for the seafood industry.

Recommendation 1 – Commit to and prioritise transparency and accountability

Our Pledge has been tested and found to resonate with community. A clear message from community in this process was that industry must be transparent and accountable to gain and maintain social license. This will require demonstrating that Our Pledge is not a marketing device, rather a tool for industry to benchmark itself against a shared set of values that benefit the common good.

It is therefore recommended that members of industry:

- View transparency and accountability as a trust building tool that can benefit their operations rather than an obligation or imposition
- Apply the framework of Our Pledge and commit effort over an extended period to hone the skills of transparently, updating their stakeholders and community on efforts and results. Resources such as “Licence to Engage” (Ogier & Brooks, 2016) have been developed to aid this process.

Recommendation 2 – Develop goals before evaluating performance

Our Pledge has successfully amalgamated industry and community values and expectations to form a commitment which can be used to determine if industry is living up to the expectations of society and, in doing so, gain acknowledgement for where industry is doing well and identifying opportunities for where things could be done better. Evaluating performance however is difficult to achieve without aligning performance measures with specific goals and targets.

Performance could be measured against current governance and management practices but adhering to the rules is an inherent expectation of community when asked to provide their opinions on how industry should act. What resonates more with community are shared goals which are designed to benefit the common good. These types of goals often extend beyond compliance and position an organisation or industry as one which strives for positive impact and to be of greater value to society than just to its shareholders.

It is therefore recommended industry:

- As an extension of Our Pledge, develop a process so that goals, targets and meaningful metrics can be developed and ensure that these are aligned with issues that the public and stakeholders deem important.
- Test that goals developed go beyond compliance, as compliance is a community expectation and, in their eyes, seldom newsworthy
- That industry engages with agencies responsible for management and governance to consolidate how key performance related information is collected, evaluated and acted upon so that impact can be more effectively evaluated, communicated and amplified at an industry level

Stocktake and performance evaluation is the subject of a complementary project funded through an Australian Government grant program, *Marketing the Australian seafood industry – demonstrating our commitment to long-term sustainability and environmental responsibility*.

Recommendation 3 – Ensure evidence supporting Our Pledge is easy to understand

While there is abundant evidence demonstrating that Australian commercial seafood industry currently operates to a high standard in each category of performance described within Our Pledge, this is only poorly understood by the public. Indeed, many industry representatives engaged during this study express a degree of frustration regarding the lack of acknowledgement of the science, management and effort that is invested to ensure that industry is sustainable, accountable, innovative and safe. Survey results from this study support the observation that these messages are not being received or acknowledged by the majority community and stakeholders. Despite this, our study and others find that much of the Australian public is interested in the Australian seafood and wants to support it.

Industry should therefore ensure that:

- Information they provide to help build community relationships and support is delivered in a way that is non-technical, easy to understand and engaging.
- Stories and narratives delivered by real people are used often as they frequently trump highly engineered communications full of facts and industry jargon that seek to persuade audiences with a chosen message
- Strategies to monitor how well information is being received by target audiences are well integrated into initiatives designed to test and extend Our Pledge (or any other efforts intended to influence the social licence of industry or organisations) at the inception of the initiative

Recommendation 4 – Engage in regular outreach and engagement

Building relationships takes time, and trust can only be earned by trying to understand others and incorporating their perspectives into decision making. Both activities require sustained effort and two-way communications. It is therefore encouraging that findings within this project show community is interested in learning more about the seafood industry, presenting opportunities for those willing to commit.

Consistent communications are key, and communication resources are abundant. An example one specifically tailored to the seafood industry is “Licence to Engage” (Ogier and Brooks, 2016).

To best test the effectiveness of Our Pledge it is recommended that:

- Regardless of the medium/s used to communicate with those targeted, clear articulation of values and goals backed by consistent updates on progress towards these is practiced. Presenting these in easy to understand and entertaining formats while encouraging and engaging in feedback will go a long way towards building effective, long lasting relationships. Gaining trust and building relationships requires two-way conversations which will be inhibited if people external to your organisation cannot effectively engage because they are ill-informed or are not given the opportunity to do so.
- Consistent measurement and re-evaluation of community sentiment in response to targeted extension and communication initiatives are needed to understand what works. Trial and error will be required to get the message and response right.
- Assistance be sought or given to parts of industry who are unwilling to engage in these activities for fear of rejection or lack of confidence. Experience from this and related studies shows that industry has an abundance of stories that interest stakeholders and segments of society and they should be proud of their conduct and be less wary of telling their story.

Recommendation 5 – Be responsive and open to change

Listening and responding to others lays at the heart of social licence. To gain trust and understanding, anyone engaging in these processes needs to move away from a mindset of trying to convince others and more towards one of incorporating other perspectives and working towards mutually beneficial or acceptable outcomes.

This may mean that some traditional practices and beliefs need to be questioned not only by industry but also by the public interesting in playing a part in how industry acts. Opinions outside of industry and changing societal pressures can open the door for innovation, However, ignorance on the part of community and stakeholders can lead to a lack of trust and support, and damage otherwise well-thought and highly viable operations.

The final step in testing Our Pledge and other social licence orientated responses is to ensure that responsiveness and an open mind are embedded into the program.

In order to ensure this is the case it is recommended that:

- When engaging in conversations, industry should be open to criticism and responsive to interests and concerns. This does not mean prioritising the opinions of our harshest critics, rather taking onboard feedback that provides insight into what practices are supported or perceived as controversial, and then carefully considering how to respond.
- A clear decision-making rationale is made available to all so that society understands why industry acts the way it does
- Current and emerging leaders are trained and encouraged to engage in these conversations.
- Feedback from stakeholders and society is fed into RD&E and then used to facilitate greater uptake of improvements and related initiatives that respond to changing community sentiment.

Further development

The stocktake and performance evaluation could not be completed during this project and is the subject of a complementary project funded through an Australian Government grant program, *Marketing the Australian seafood industry – demonstrating our commitment to long-term sustainability and environmental responsibility*.

More effort is also required to ensure current and emerging leaders are trained and encouraged to engage in conversations concerning how the values and practices of industry align with the values and expectations of society.

Extension and Adoption

SIA has taken responsibility for carriage of extension, and will draw on their existing communications resources, network and contacts with industry organisations and members to undertake this responsibility. Extension will focus on increasing awareness of activities that demonstrate recognised shared values and commitment to supporting industry behaviours detailed within Our Pledge and gaging community and stakeholder response. Australian Council of Prawn Fisheries will use outputs of this project as part of its Community Engagement 2018-2020 Strategy.

Key messages included within extension activities are:

- Australian seafood industry has a common set of values
- Australian seafood industry acknowledges and respects the values of the Australian community at large for its coastal and marine environments and industries, now and as they change

Extension activities will be undertaken through a dedicated website, social media and via extensions via industry associations.

Project coverage

A communication plan was developed and executed by Seafood Industry Australia as a part of this project. The following is a record of the results achieved.

Method	Responsibility	Update
Media relations	SIA	SIA has performed media relations around workshops that have been held.
Social media engagement	SIA and co-investigators	Workshops advertised and reported on. Stories connected to “Our Pledge”, industry member profiles.
Inclusions in industry and association newsletters and communications.	SIA	See media coverage table for details.
Presence at industry and association meetings to promote involvement.	SIA	Presented “Our Pledge” at: <ul style="list-style-type: none"> • NSW Fishing Training Committee AGM • Abalone Council Australia Ltd AGM • Wildcatch Fisheries SA AGM
State and regional visits/forums to meet with SIA members, industry and associations.	SIA	As per Table 3.
Harnessing NSILP / industry leaders to promote involvement in the project and to sign the Pledge	SIA and co-investigators	National webinar held. Unable to garner interest from NSILP alumni.
SIA member and non-member newsletters.	SIA	Workshops advertised through member newsletter.

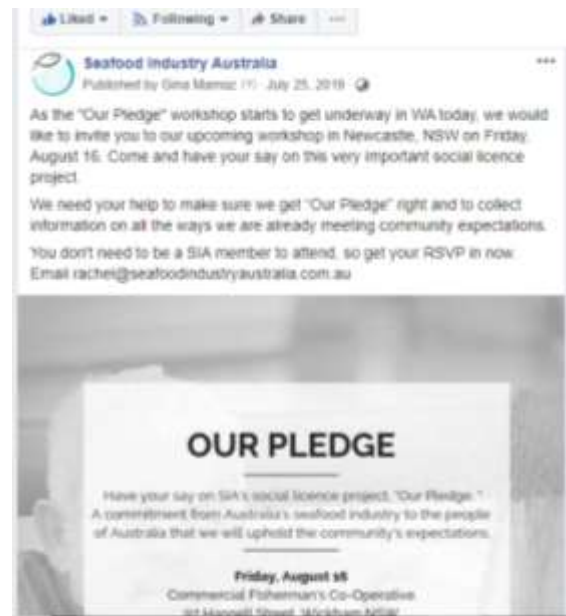
Our Pledge in the media February 2019 – December 2019

**shaded items are coverage about the workshops*

Date	Media Outlet	Topic	Headline
22.02.19	Fish Focus	Our Pledge	Seafood Industry Australia workshop makes splash in Darwin
10.07.19	ABC Tropical North, Mackay	Mackay Workshop	Interview with Jane Lovell
11.07.19	Daily Mercury	Social Licence – Mackay Workshop	Seafood industry seeking social licence
11.07.19	Daily Mercury News	Social Licence – Mackay Workshop	Our Pledge: Industry stands up to naysayers
15.07.19	ABC News	Plastic Free July	Abrolhos Islands seabirds using plastic to build their nests, prompting calls for research
06.08.19	South Gippsland Sentinel Times	Social licence	Seafood industry reels in trust
August 2019	Retail World	Our Pledge	Our Pledge
16.08.19	5CC Port Lincoln	Our Pledge	Interview with Jane Lovell
04.09.19	Weekly Times	Social licence campaign	Taking a stand
04.09.19	Weekly Times Now	Trust campaigns	Agriculture spending millions on trust campaigns
24.10.19	ABC Goldfields and Midwest (Geraldton)	Our Pledge launch	Interview with Jane Lovell
24.10.19	ABC Pilbara and ABC Kimberley	Our Pledge launch	Interview with Jane Lovell
24.10.19	ABC South East NSW	Our Pledge launch	Interview with Jane Lovell
24.10.19	ABC Gippsland	Our Pledge launch	Interview with Jane Lovell
24.10.19	ABC Midwest and Wheatbelt	Our Pledge launch	Interview with Jane Lovell
24.10.19	ABC Great Southern	Our Pledge launch	Interview with Jane Lovell
24.10.19	2BH, Broken Hill	Our Pledge launch	Seafood Industry Australia will be launching Our Pledge Campaign to ensure Australian seafood remains at the highest quality.
24.10.19	2SM + syndicated to 13 other programs	Our Pledge launch	Interview with Jane Lovell
24.10.19	2SM	Our Pledge launch	Interview with Jane Lovell
24.10.19	2HD	Our Pledge launch	Interview with Jane Lovell

24.10.19	ABC Radio Darwin and ABC Radio Alice Springs	Our Pledge launch	Interview with Jane Lovell
24.10.19	ABC Northern Tasmania and ABC Launceston	Our Pledge launch	Interview with Jane Lovell
28.10.11	Seafood.com	Our Pledge	Our Pledge
08.11.19	FoodProcessing	Transparency in labelling	Calls for transparency in labelling after fish fraud investigation
12.11.19	MySunshineCoast	Transparency in labelling	Fishing for the truth
21.11.19	ABC Radio Hobart	World Fisheries Day	Interview with Jane Lovell
21.11.19	FoodProcessing	World Fisheries Day	Making milestones in Aussie seafood on World Fisheries Day
21.11.19	MySunshineCoast	World Fisheries Day	Lots to celebrate about the seafood on your plate this World Fisheries Day
21.11.19	Business Acumen Queensland	World Fisheries Day	Lots to celebrate about the seafood on your plate this World Fisheries Day

Industry Workshop Social Media posts



“Our Pledge” feature article in FRDC’s FISH Magazine, July 2019 issue

Fisher conversation helps shape industry pledge

Many community and industry values align, but further action is needed to help secure the social licence of the Australian seafood sector

By Jessica McInerney, SIA



Whether you call it trust, acceptance or social licence – listening to, acknowledging and responding to community concerns is critical to the future of the Australian seafood industry. So much so that Seafood Industry Australia’s (SIA) members have made building the industry’s social licence their number one priority, says the association’s CEO Jane Lovell.

Assisted by the FRDC, SIA has assessed current and emerging community concerns using data from risk management agency Futureye, the FRDC and the Marine Stewardship Council. The primary concerns identified relate to sustainability, the environment, accountability, animal welfare and industry safety.

SIA also assessed the industry’s values and current practices. These were found to mostly align well with community values such as responsible fishing practices,

“Social licence is front and centre for our members and the wider industry, and SIA is taking a proactive approach to ensure our industry’s ongoing acceptance within the community by developing ‘Our Pledge.’”

Jane Lovell

“It is based on Seafood New Zealand’s ‘Promise’ and will include the development of an annual report card along with independent monitoring of community sentiment.

“It is critical we get the right balance; if we are making a promise it needs to be achievable, but not just ‘business as usual.’

“We need to ensure the industry is consulted and accepts the pledge statements, before we make them public. It will require us to be proud

Above Port Lincoln fishing industry representatives (L-R) Ross Hay, Ashley Lukin, Simon Clark, Chay Haldane, Seafood Industry Australia CEO Jane Lovell, Peter Lauer and Greg Palmer give ‘Our Pledge’ the thumbs up. Photo: Supplied

Australian Fishing Industry Council, Sydney Fish Market, the Abalone Association of Australasia, Tasmanian Seafood Industry Council, Australian Mariners Welfare Society, and Australian Fisheries Management Authority commissioners.

Northern Territory Seafood Council CEO Katherine Winchester says the workshop in the Northern Territory provided an important opportunity to help shape ‘Our Pledge’.

“It was great to hear the thoughts and conversations from Territory professional fishers,” she says. “These conversations build understanding and reiterate the importance for industry to do more than just tell its good story. There are concerns and issues the community wants to see the industry tackle.”

Media release and social media around the launch of Our Pledge to industry in late October

Media release - <https://seafoodindustryaustralia.com.au/2019/10/24/our-pledge-australias-seafood-industry-launches-social-licence-campaign/>



Appendices

**Appendix A – Review of Community Attitudes toward Australian Seafood
(Futureeye)**



Seafood Industry Australia

September 2018

Futureye

Executive Summary

Seafood Industry Australia (SIA) is the national peak body representing Australia's seafood industry.

It intends to develop a 'charter or promise' to demonstrate the industry's intent to earn its 'social licence to operate.'

SIA commissioned Futureye, as experts in social licence, to review existing research into community attitudes, as well as other market research, that has been undertaken since 2014 and to make recommendations about what to address in this charter or promise.

Based on our analysis, we recommend the charter should reflect the industry's commitment to:

1. Ensure that sustainability, of both fishing stock and habitat protection, is a primary focus;
2. Ensure that accountability for industry participants who break the rules is addressed;
3. Ensure that community engagement becomes an important element of strategy formation and execution;
4. While addressing the potential of aquaculture and fish farming to reduce reliance on wild harvest and overfishing, acknowledge environmental concerns and commit to transparent investigation and mitigation of these issues, and
5. Acknowledge that the community is cynical about valuing the economic contribution of industry over concerns about its operations and impacts.

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2 Introduction

Seafood Industry Australia (SIA) believes that the values and expectations of the community can impact on the industry operations. It is therefore beneficial to understand changing values and expectations in order to mitigate future or emerging risks to the operating and regulatory environment.

The phrase that describes this approach is ‘social licence’. This is the implicit acceptance by society of an organisation, product, service, or project. It is generated when the behaviour of organisations is perceived to be aligned with or exceeding societal expectations. It is lost when behaviours are perceived to be out of alignment with societal values and expectations.

In terms of the seafood industry, this can be summarised as it having the necessary practices and policies in place that ensure the future of fish species and the marine environment while at the same time providing sufficient supply of fish for commercial and recreational fishing needs.

In order to understand society’s current values and expectations about the industry, Futureye was commissioned to review research since 2014 that we have undertaken about the industry, as well as research undertaken by others, and make recommendations that can inform a highly effective charter or promise.

These include:

“Community perceptions of the sustainability of the Australian fishing industry” June 2017, survey and report by Intuitive Solutions, commissioned by the Fisheries Research and Development Corporation (FRDC).

“Consumer Sentiment Towards Australian Fresh Food & Fibre Benchmark Report” March 2018, Quantum Research for the NSW Department of Primary Industries and the NSW Farmers’ Association.

“Let’s Talk Fish: Assisting industry to understand and inform conversations about the sustainability of wild-catch fishing” 2014, Dr. Nicki Mazur, Professor Allan Curtis and Mr. Andy Bodsworth on behalf of the FRDC.

“Community attitudes towards Australian Fisheries Management” June 2015, market research Essence Communications, for Department of Agriculture & Water Resources

Additionally, we reviewed these findings against similar research Futureye had undertaken for individual industry participants, as well as for the Northern Territory Seafood Council. This research confirms the findings in the reports listed above.

3 Social licence issues

The primary concerns raised for the fishing industry from a community perspective are those surrounding environmental sustainability and industry and government accountability.

Sustainability of fishing practices

Futureye's research identified that community members viewed environmental sustainability as the chief concern when considering Australia's seafood industry. The following are the key concerns of community members when addressing environmental sustainability.

Global overfishing

There is a perception that the sustainability of fisheries is compromised by a short-term, profit driven approach to managing fish stock. While this view is applied less to Australian fishery management than to fishing practices globally, Futureye has found that this perspective does resonate with some stakeholders.

In relation to overfishing of Australian stock, Futureye's research indicates community members have adopted a 'hear no evil' approach, stating that if they have not heard major problems in relation to the fishing industry, then it is not of concern. Though this may be a seemingly favourable position to be in in the short-term, it presents a potential risk to the industry if negative information relating to overfishing was to suddenly break into mainstream media and alter perspectives.

Other stakeholders have stated that Australian fishery management is only slightly better than the rest of the world. There is a strong perception that the government cares more about the economy than the environment (Community attitudes towards Australian Fisheries Management, p.21). Perceptions of global unsustainable fishing support this narrative (Community attitudes towards Australian Fisheries Management, p. 21).

Perceptions of the fishing's industry's sustainability as a whole have become more positive in recent years. It should, however, be noted that 59% of survey respondents still believe that overall the fishing industry is not sustainable (*Community perceptions of the sustainability of the Australian fishing industry -2017 research* (p. 11). Further, nearly a third of respondents believed that sustainability and maintaining fish stocks, either through a quota system, minimising undersized catch or through developing aquaculture, was a key issue facing the industry (p. 14, Community attitudes towards Australian Fisheries Management).

Commercial fishing vs farmed fishing

Perceptions of the sustainability of commercial fishing were identified as the most significant influence on views of the industry's sustainability as a whole (*Community perceptions of the sustainability of the Australian fishing industry -2017 research*, p. 9). Importantly, the same report (p. 11) found that commercial wild catch was perceived to be the least sustainable form of fishing. There was a general concern that commercial fishing can cause both overfishing of targeted stock and by-catch, which can impact on biodiversity and ecology. These were also key concerns identified by stakeholders when Futureye conducted work in 2017 with the Australian Council of Prawn Fisheries.

Fish farming was viewed as the most sustainable form of fishing, and was largely endorsed by members of the Australian community. However, despite its largely positive perception, some community members identified that fish farming has the potential to pollute waterways, and may raise the level of mercury in fish (*NSW farmers benchmark report – seafood specific only, and its position amongst others – 56*).

Australia's unique marine environment

Futureye found that messages around the uniqueness and pristine nature of Australia's environment did well to address the concerns of stakeholders. Messages such as, "Australia is one of the few places in the world with a diverse marine ecosystem and we need to look after it," (Community Attitudes Towards Australian Fisheries Management, p. 18) indicated a commitment to maintain Australia's valuable environment, ecology and biodiversity. Messages that focused on the adequacy of efforts of government and/ or industry to enhance environmental outcomes received a weaker reception, with stakeholders suggesting more government involvement is required to ensure fisheries are sufficiently regulated and protected.

Industry, jobs, and income

Community members were largely unsympathetic to jobs that may be lost as a result of a diminished seafood industry or lowering of catch limits. Preserving Australia's valuable environment for future generations was seen as being of significantly greater concern than short-term losses of jobs for the industry (*Community perceptions 2017, pg. 26*).

Accountability of industry participants

Role of government

There is a general perception that the government's role is to regulate specific actions, limit the capture of non-targeted species and enforce against illegal activity (Community attitudes towards Australian Fisheries Management, p. 16). Presently there is a strong agreement that the government's focus is on the economy rather than the environment, which is fuelling distrust of both the government and industry (Community attitudes towards Australian Fisheries Management, p. 16).

Distrust in the government and industry

Community members were extremely distrustful of the fishing industry, with only 15% believing that the industry can be trusted (Let's Talk Fish, p.46). Similarly, only 22% of stakeholders believe that the government could be trusted, with over half stating that government has not adequately explained current sustainability measures (Let's Talk Fish, p. 47). Money was seen to be the most corrupting influence causing distrust of the industry and government.

Those who distrusted the industry also cited a lack of research or selective distribution of information as a cause for distrust. There was a sense that technical information needs to be made more readily available to allow stakeholders to make their own conclusions on the industry's efforts to improve outcomes.

Twenty-seven percent of respondents did not think they could rely on government to manage fisheries for either sustainable fish stocks or viable fishing communities (Let's talk fish, p. 46). Further, thirty-seven percent of respondents did not agree that the industry could be relied on to reduce harm to marine animals or sustain fish stocks for future generations (Let's talk fish p. 46,).

Independent certifications of fisheries, such as MSC, ASC and Friend of the Sea, were seen to be relatively trustworthy and may improve the perception of fisheries with community members (Community Perceptions 2017, p. 10).

Misperceptions

Public and stakeholder (mis)perceptions were cited as a major issue affecting the wild-catch fishing industry's social acceptability. Interview respondents from Let's talk fish (p. 38) were concerned that conclusions about commercial fishers harming the environment were flawed as they were based on an understanding that commercial fishing, "catches everything in its path." This misperception was seen to negate genuine efforts by members within the industry who conduct their practices sustainably. There was also a perception by those interviewed that these perspectives were built on overseas fisheries management, and were distorted by ENGOs, who have louder voices than others, such as industry or government (Let's talk fish, p. 39).

4 Practices

This section focuses on specific behaviours or practices within the industry that community members are concerned about. They are ranked in order of most to least concern, as identified by Futureye.

1. *Overfishing.* Overfishing is perceived to be of chief concern within the fishing industry. There is a perception that fishers are fishing beyond their allowed limits, resulting in depleting fish stocks to unsustainable levels.
2. *Trawling.* There is a belief that trawling has the capacity to significantly damage habitats and impacts on biodiversity and environmental sustainability.
3. *Bycatch and discards.* There is a general concern that trawlers and other fishing vessels catch wildlife such as seals and dolphins in their nets, causing injury or death.
4. *Pollution from aquaculture/fish farming.* There is a perception that pollutants from aquaculture will leech into the water table, presenting an environmental risk. Similarly, there are concerns that pollutants from fish farms damage the immediate environment around and under the pens.
5. *Elevated mercury in the product from aquaculture.*
6. *Depth trauma.* There are concerns about cruelty in the industry, such as the crushing of fish at the bottom of nets when they are raised to the surface quickly.
7. *Unfavourable contact with industry.* There is a concern that members within the industry do not care about the community and will willingly confront those who challenge the industry.
8. *Safety in the industry.* There is a perception that some vessels are unsafe and that physical injury rates are seen to be too high. There is also concern that the fishing industry is rife with bullying, causing widespread mental health issues.
9. *Indigenous community involvement.* Futureye has identified a general concern about the lack of indigenous involvement in the fishing industry, especially in the Northern Territory where the Blue Mud Bay High Court decision has affirmed land rights extend to the intertidal zone.

Futureye has conducted previous research on a number of the above issues, which are discussed in further detail below.

Indigenous Australians involvement in the industry

The fishing industry could benefit from building stronger relationships with Traditional Owners. The industry encourages indigenous involvement, however there have been reported cases of Traditional Owners catching fishery operators illegally fishing near their communities and interfering with sacred sites. There is also a perception that commercial fishers display a sense of entitlement to fish these areas. These attitudes will perpetuate barriers to the inclusion of Indigenous communities in the Australian fishing industry.

Traditional Owners are also concerned about management decisions made by government regarding the fisheries surrounding their land. Traditional Owners have suggested that the government is not taking local impacts or interests into consideration when making decisions.

Safety and welfare of the fishery working environment

For a third year in a row, fishing was found to be one of the most hazardous industries in Australia. There is a general concern that this is perceived to be a badge of honour by some within the fishing community.

Concerns related to discards and Threatened and Endangered Protected Species (TEPS)

There is a perception that professional fishers are not taking enough ownership of their performance, as evidenced by the volume of bycatch and the bycatch of Threatened Endangered and Protected species (TEPs).

User groups have expressed concerns that the industry does not accurately report bycatch and TEPS interactions. There is also concern that the industry is not seeking to improve its impact on TEPS. Whether the views are accurate or not, it creates a significant lack of trust in industry's operation between user groups, such as recreational fishers and within Aboriginal communities.

Catch and release

Studies show that fish that are caught and then returned to the water suffer such severe physiological stress that they often die of shock. Fish often swallow hooks, and anglers may try to retrieve a hook by shoving their fingers or pliers down the fish's throat, ripping out not just the hook but some of the fish's throat and guts as well. When fish are handled, the protective coating on their bodies is disturbed. These and other injuries make fish easy targets for predators once they are returned to the water.

Some animals are totems for Indigenous people. Traditional Owners have a spiritual connection with some animals and they are considered sacred. By-catch that is discarded is viewed as wastage and does not align with Indigenous culture.

Suffocation and sudden change in pressure

"Every year billions of animals are pulled out of the water in huge nets to be killed for 'food'. As animals are pulled to the surface, many are crushed to death under the weight of so many other animals. Others suffer from burst eyes and organs due to the sudden change in pressure. Those who are not dead before they hit the boat deck, will suffer a slow and painful death from suffocation." Dr Culum Brown, Animals Australia.

Un-sustainable and unprofessional behaviours in the wild-catch fishing industry

There is a general concern that there is a failure of participants in the seafood industry to adopt more sustainable practices, or where they have done, how it is demonstrating this uptake. There is a perception by some that the industry is not prepared to adopt sustainable activities, and that there is a belief that fishers have a 'right to fish' over a responsibility as stewards for a shared resource.

5 Conclusions

The most critical issues affecting the community's views of, and concerns about, Australia's seafood industry should be the focus of the charter or promise being developed by SIA to demonstrate the industry's intent to earn its social licence to operate.

1. Ensure that sustainability - fishing stocks and habitat - is the primary focus of the promise or charter.

Sustainability is the key positive value the community is seeking from the industry. Their concerns around this have increased over the time-frame analysed by the research. They are concerned that there is insufficient accountability to ensure the industry is genuinely complying with the science and government regulations to ensure this occurs.

2. Ensure that accountability for industry participants who 'break the rules' is a major element of the charter.

The research confirms that the community believes that strong government action and a strict regulatory environment are important elements to ensure the industry is genuinely focussed on improving sustainability of the fish stocks and the environment.

In particular, there is heightened awareness about the sustainability of fish stocks elsewhere in the world, and the perceived ill-effects of 'super trawlers' and overfishing. These issues affect the community's view of the Australian industry and whether it can achieve sustainability and mitigate adverse environmental impacts.

3. Ensure that community engagement becomes an important element of strategy formation and execution.

The research confirms that, the more people are aware of the operations of the industry, its participants and systems, and its commitment to more transparently listen to and engage with society's values, the more they appreciate its efforts to achieve sustainability.

Understandably, the less familiar people are with the issues, the more likely they are to be cynical that the industry's commitments are genuine.

4. While addressing the potential of aquaculture and fish farming to reduce reliance on wild harvest and overfishing, the industry must acknowledge environmental concerns and commit to transparently investigate them and provide solutions to mitigate the adverse effects.

The community is aware of the views of highly-involved critics, such as Greenpeace, and their concerns about aquaculture. While critics acknowledge that fish farming may play an important role reducing pressures on natural fish stocks, they are concerned about the environmental and other effects of intensive farming methods, such as the transmission of viruses and disease and harmful effects of pollution on the environment.

5. Acknowledge that the community is cynical about valuing the economic contribution of industry over concerns about its operations and impacts.

Increasingly, the community is more concerned with sustainability than with supply or the economic benefits of the industry to Australia. A focus on 'benefit-selling' therefore undermines the industry's credibility on its commitment to the environment and sustainability.

Once the Australian seafood industry establishes its commitment to addressing these issues to build greater understanding, trust and transparency about its operations, it will create opportunities for it to then reinforce the industry's benefits.

For example, Country of Origin labelling is seen by consumers as a positive way of empowering them to support a sustainable, healthy Australia seafood industry. Respondents indicate support for statements that highlight Australian seafood as healthier and the industry as having better health and safety standards and environmental outcomes than some overseas countries.

However, as stated above, 'benefit-selling' is only seen as credible after industry has acknowledged the concerns and dilemmas it faces and demonstrated its commitment change.



Futureeye

Adelaide – Brussels - Canberra - Frankfurt - Hobart – London

Melbourne - New York - Paris - Raleigh – Singapore – Sydney – Vancouver

Appendix B – The Pledge – Industry Values and Practices (Sea Change Consulting Australia)

The Pledge

Industry values and practices

Report to Seafood Industry Australia

Dr Kirsten Abernethy, Sea Change Consulting Australia

Methods to determine Industry values and practices

1. Derived a list of wildcatch and aquaculture organisations.

These included peak bodies and industry representative organisations, and businesses which included producers, wholesale, processing, retail, restaurant, and vertically integrated businesses across the supply chain. The SIA membership was used as the base, but some additional relevant organisations were added. Not included were organisations focused on training, consulting, marketing/sales advising, transport, fish feed, overseas, and those with no website. A total of 52 organisations were analysed.

2. Recorded the Values Statements of the organisations.

Using the organisation's website text, (e.g. "about us"), strategic documents, newsletters and media releases, **Values Statements** were extracted. It is important to note that these statement of values were not necessarily only values (i.e. moral principles, beliefs or standards), but encompassed *the things that are important* to the organisation. These were often referred to as 'goals', 'mission', 'objectives', 'principles', 'strategic focus/priorities', 'vision', or 'values'.

3. Recorded the Practices of the organisations.

Using website text, newsletters, media releases and recent annual reports, **Practices** were also extracted. These were treated as evidence that the organisation was putting their Values into action, and it should be argued actions and practices carry more weight in terms of what Industry's actual Values are.

4. Categorising the Values and Practices.

In total, 1014 Values Statements and Practices were analysed (571 Values Statements, 443 Practices). Each Values Statement and Practice was given a category name (e.g. To be a united industry), and these were refined until there were as few categories ('codes') as possible, without losing important detail. There is a total of 43 codes for all the Values Statements and Practices.

5. Analysis.

The analysis presented here is very simple, looking at the **percentage of organisations who make the Values Statement**, and the **percentage of organisations who show evidence of Practising what they value**. I have split the data by Industry type (Wildcatch and/or Aquaculture) and by organisation type (Industry Association or Business) to see if there are differences. The analysis is simply 'presence or absence' of the Value/Practice rather than determining the priority of the organisation because the data can be confounded by an organisation's website focus (e.g. it may be focused on the industry compared to the consumer or public), and what they report on the website (e.g. some don't publish annual reports or keep their site up to date).

Key discussion points

- There are differences between what seafood organisations say they Value and what they actually Practice. Given there is evidence of the Practices, it may be better to use Practices to develop the Pledge.
- There are differences between the Values and Practices of organisations depending on whether they are a Peak body/Industry Association, or a Business; and whether they are wildcatch focussed or aquaculture focussed.
- Key Values that are common regardless of the type of organisation or sector are:
 - The sustainability of the environment and its natural resources is paramount, and our seafood is sourced from a pristine environment
 - The industry is committed to responsible practices and stewardship, and will continue to improve
 - The industry provides high quality, fresh and delicious seafood
- Key Practices that are common regardless of the type of organisation or sector are:
 - The sustainability of the environment and its natural resources is paramount, and our seafood is sourced from a pristine environment
 - The industry is undertaking responsible practices and stewardship, and is committed to improving
 - The industry strives to connect to and meet the expectations of seafood consumers and customers
 - The industry values collaboration, engagement and their relationships with stakeholders, government, businesses and communities
 - The industry is committed to sharing information about the industry, business, and products
 - Building industry and organisational capacity, and provide professional development
- However there are many more Values and Practices that are important to the Seafood Industry

List of Organisations included in the study by sector and type

Name of organisation	Sector	Type of organisation
Raptis Premium Seafood	Wildcatch	Integrated seafood company
Austral Fisheries	Wildcatch	Integrated seafood company
Australia Bay Seafoods	Wildcatch	Integrated seafood company
Brown Dog Fishing Company	Wildcatch	Integrated seafood company
Chaceon	Wildcatch	Integrated seafood company
MG Kailis	Wildcatch & Aquaculture	Integrated seafood company
Mackay Reef Fish Supplies	Wildcatch	Integrated seafood company
Mures Tasmania	Wildcatch	Integrated seafood company
Fremantle Octopus	Wildcatch	Integrated seafood company
Western Australian Fishing Industry Council	Wildcatch & Aquaculture	Peak Body/Industry Association
Northern Territory Seafood Council	Wildcatch & Aquaculture	Peak Body/Industry Association
Queensland Seafood Industry Association	Wildcatch	Peak Body/Industry Association
Professional Fisherman's Association NSW	Wildcatch	Peak Body/Industry Association
Seafood Industry Victoria	Wildcatch	Peak Body/Industry Association
Wildcatch Fisheries SA	Wildcatch	Peak Body/Industry Association
Tasmanian Seafood Industry Council	Wildcatch & Aquaculture	Peak Body/Industry Association
Australian Council of Prawn Fisheries	Wildcatch	Peak Body/Industry Association
Australian Southern Bluefin Tuna Industry Association	Wildcatch & Aquaculture	Peak Body/Industry Association
Northern Prawn Fishery Industry Pty Ltd	Wildcatch	Peak Body/Industry Association
Pearl Producers Organisation	Wildcatch & Aquaculture	Peak Body/Industry Association
Southern Rocklobster Limited	Wildcatch	Peak Body/Industry Association
Spencer Gulf & West Coast Prawn Fisherman's Association	Wildcatch	Peak Body/Industry Association
Tasmanian Rock Lobster Fishermens Association	Wildcatch	Peak Body/Industry Association
Tuna Australia Limited	Wildcatch	Peak Body/Industry Association
Womens Industry Network Seafood Community	Wildcatch & Aquaculture	Peak Body/Industry Association
Great Australian Bight Fishing Industry Association	Wildcatch	Peak Body/Industry Association
Aquaculture Council of Western Australia	Aquaculture	Peak Body/Industry Association
Australian Abalone Growers Association	Aquaculture	Peak Body/Industry Association
Australian Barramundi Farmers Association	Aquaculture	Peak Body/Industry Association
Australian Prawn Farmers Association	Aquaculture	Peak Body/Industry Association
The Master Fish Merchants Association of Australia	Wildcatch & Aquaculture	Peak Body/Industry Association
Queensland Seafood Marketers Association	Wildcatch & Aquaculture	Peak Body/Industry Association
South East Trawl Fishing Industry Association	Wildcatch	Peak Body/Industry Association
Southern Shark Industry Alliance	Wildcatch	Peak Body/Industry Association
Australian Wild Abalone/Abalone Council Australia	Wildcatch	Peak Body/Industry Association
Troy Billin	Wildcatch	Producer
Dennis Holder	Wildcatch	Producer
Northern Wildcatch Seafood Australia	Wildcatch	Producer
Westmore Seafoods	Wildcatch	Producer
Humptydoo Barramundi	Aquaculture	Producer
Huon Aquaculture	Aquaculture	Producer
Petuna	Wildcatch & Aquaculture	Producer
Stehr Group	Wildcatch & Aquaculture	Producer
Tassal	Aquaculture	Producer
Catalano Seafoods	Wildcatch & Aquaculture	Retail/Restaurant
Steve Costi's Famous Fish	Wildcatch & Aquaculture	Retail/Restaurant
Morgans Seafood	Wildcatch & Aquaculture	Retail/Restaurant
Sydney Fresh Seafood	Wildcatch & Aquaculture	Retail/Restaurant
Sydney Fish Market	Wildcatch & Aquaculture	Wholesale/processing/retail
Poulos Bros	Wildcatch & Aquaculture	Wholesale/processing/retail
Seafresh Australia	Wildcatch	Wholesale/processing/retail
Urangan Fisheries	Wildcatch	Wholesale/processing/retail

All of the
Values and
Practices
Industry
say are
important
to them

Value/Practice

Sustainability of the environment and natural resources, "pristine environment"

Providing high quality/fresh/tasty products

Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices

Connecting to, and meeting expectations of consumers/customers

To collaborate, engage and build relationships (stakeholders, government, businesses, communities)

To be a strong voice/advocate, demonstrate leadership and influence

Economic importance and sustainability including employment

Innovative, modern and technologically advanced

To build industry and organisational capacity, provide professional development

To be active in research and collaborate with researchers and students

Connecting to, and serving communities

Maintaining and increasing productivity, performance and reliable/consistent supply

Sharing information (about the industry, business, products)

Demonstrating (and being recognised for) the contribution the industry makes

Healthy seafood

Supporting family/multigenerational/small businesses

Transparency, honesty, open communication

The importance of the culture of the industry (livelihoods, history, cultural connection)

Strong biosecurity, food safety and handling

To enhance market opportunities

Securing access to resources

Profitability

To be a united industry/workforce

Professional

Pride and passion for what we do

To engage in fisheries/aquaculture management and policy processes

Sharing access to the environment space

Health and safety of people working in the industry

To act with integrity

To act with respect

Traceability

To act ethically

To have and build a positive reputation

Locally produced seafood/provenance

To be trusted

Belief in research/science/evidence to support decision-making

Good governance

Efficiency

Food security

Adapting to environmental change

Support, encourage and respect the diversity of the industry

To be accountable

To self-regulate

Should Industry Values or Practices
be used for The Pledge?

There are differences in what
Industry say and do

More than 25% of all organisations say these Values are important

Value	% of all organisations (n=43)
Sustainability of the environment and natural resources, "sources from a pristine environment"	88
Providing high quality/fresh/tasty products	60
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	56
Connecting to, and meeting expectations of consumers/customers	44
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	40
To be a strong voice/advocate, demonstrate leadership and influence	40
Economic importance and sustainability including employment	30
Innovative, modern and technologically advanced	30
To build industry and organisational capacity, provide professional development	28
To be active in research and collaborate with researchers and students	26
Connecting to, and serving communities	26

More than 25% of all organisations Practice these Values

Practices	% of all organisations (n=39)
Sustainability of the environment and natural resources, "sources from a pristine environment"	82
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	72
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	46
Connecting to, and meeting expectations of consumers/customers	44
Providing high quality/fresh/tasty products	38
To build industry and organisational capacity, provide professional development	36
Sharing information (about the industry, business, products)	36
To engage in fisheries/aquaculture management and policy processes	36
To be active in research and collaborate with researchers and students	33
Connecting to, and serving communities	31
Health and safety of people working in the industry	28
Economic importance and sustainability including employment	26
Innovative, modern and technologically advanced	26
Strong biosecurity, food safety and handling	26
Locally produced seafood/provenance	26

Where the similarities and differences between Stating Values and Practising them lie

Value	% of all organisations
Sustainability of the environment and natural resources, "pristine environment"	88
Providing high quality/fresh/tasty products	60
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	56
Connecting to, and meeting expectations of consumers/customers	44
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	40
To be a strong voice/advocate, demonstrate leadership and influence	40
Economic importance and sustainability including employment	30
Innovative, modern and technologically advanced	30
To build industry and organisational capacity, provide professional development	28
To be active in research and collaborate with researchers and students	26
Connecting to, and serving communities	26

Different to stated practices

Practices	% of all organisations
Sustainability of the environment and natural resources, "pristine environment"	82
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	72
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	46
Connecting to, and meeting expectations of consumers/customers	44
Providing high quality/fresh/tasty products	38
To build industry and organisational capacity, provide professional development	36
Sharing information (about the industry, business, products)	36
To engage in fisheries/aquaculture management and policy processes	36
To be active in research and collaborate with researchers and students	33
Connecting to, and serving communities	31
Health and safety of people working in the industry	28
Economic importance and sustainability including employment	26
Innovative, modern and technologically advanced	26
Strong biosecurity, food safety and handling	26
Locally produced seafood/provenance	26

Different to stated values

Different

Different

Looking at the type of organisation

Peak bodies and Industry Associations
& Businesses

Peak bodies/Industry Associations: Where the similarities and differences lie

Values

% Peak Bodies/Associations (n=25)

Different to stated practices

Sustainability of the environment and natural resources, "pristine environment"	92
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	64
To be a strong voice/advocate, demonstrate leadership and influence	60
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	56
Providing high quality/fresh/tasty products	44
Economic importance and sustainability including employment	44
To build industry and organisational capacity, provide professional development	40
Sharing information (about the industry, business, products)	36
Demonstrating (and being recognised for) the contribution the industry makes	36
To be active in research and collaborate with researchers and students	36
Transparency, honesty, open communication	36
Connecting to, and meeting expectations of consumers/customers	32
Connecting to, and serving communities	32
To enhance market opportunities	32
Profitability	28
Securing access to resources	28

Practices

% Peak Bodies/Associations (n=23)

Different to stated values

Sustainability of the environment and natural resources, "pristine environment"	78
Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	61
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	48
Connecting to, and meeting expectations of consumers/customers	48
To build industry and organisational capacity, provide professional development	43
Sharing information (about the industry, business, products)	43
To be active in research and collaborate with researchers and students	39
To engage in fisheries/aquaculture management and policy processes	39
Strong biosecurity, food safety and handling	39
To enhance market opportunities	35
Economic importance and sustainability including employment	26
Demonstrating (and being recognised for) the contribution the industry makes	26
Locally produced seafood/provenance	26
Health and safety of people working in the industry	26

Businesses: Where the similarities and differences lie

	Values	% Businesses (n=18)
Different to stated practices	Sustainability of the environment and natural resources, "pristine environment"	83
	Providing high quality/fresh/tasty products	83
	Connecting to, and meeting expectations of consumers/customers	61
	Innovative, modern and technologically advanced	56
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	44
	Supporting family/multigenerational/small businesses	33
	The importance of the culture of the industry (livelihoods, history, cultural connection)	28
	Healthy seafood	28
	Pride and passion for what we do	28
		Practices
Different to stated values	Sustainability of the environment and natural resources, "pristine environment"	88
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	88
	Providing high quality/fresh/tasty products	63
	Innovative, modern and technologically advanced	44
	To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	44
	Connecting to, and serving communities	44
	Connecting to, and meeting expectations of consumers/customers	38
	Health and safety of people working in the industry	31
	To engage in fisheries/aquaculture management and policy processes	31
	To build industry and organisational capacity, provide professional development	25
	To be active in research and collaborate with researchers and students	25
	Economic importance and sustainability including employment	25
	Sharing information (about the industry, business, products)	25
	Locally produced seafood/provenance	25

Whether an
industry association
or a business, both
types of
organisations agree
on these **Values:**

- The sustainability of the environment and its natural resources is paramount, and our seafood is sourced from a pristine environment
- The industry is committed to responsible practices and stewardship, and will continue to improve
- The industry provides high quality, fresh and delicious seafood
- The industry strives to connect to and meet the expectations of seafood consumers and customers

However, the Values are different between organisation type.

Values	Industry Association	Business
To be a strong voice/advocate, demonstrate leadership and influence	X	
To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	X	
Economic importance and sustainability including employment	X	
To build industry and organisational capacity, provide professional development	X	
Sharing information (about the industry, business, products)	X	
Demonstrating (and being recognised for) the contribution the industry makes	X	
To be active in research and collaborate with researchers and students	X	
Transparency, honesty, open communication	X	
Connecting to, and serving communities	X	
To enhance market opportunities	X	
Profitability	X	
Securing access to resources	X	
Innovative, modern and technologically advanced		X
Supporting family/multigenerational/small businesses		X
The importance of the culture of the industry (livelihoods, history, cultural connection)		X
Healthy seafood		X
Pride and passion for what we do		X

Whether an industry peak body/association or a business, there is a high level of similarities in their **Practices:**

- The sustainability of the environment and its natural resources is paramount, our seafood is sourced from pristine waters
- The industry is committed to responsible practices and stewardship, and will continue to improve
- The industry strives to connect to and meet the expectations of seafood consumers and customers
- The industry values collaboration, engagement and their relationships with stakeholders, government, businesses and communities
- The industry is committed to sharing information about the industry, business, and products
- Building industry and organisational capacity, and provide professional development
- To be active in research and collaborate with researchers and students
- To engage in fisheries and aquaculture management and policy processes
- The industry is economically important and provides employment, and seeks to be sustainable in the long term
- To showcase the provenance of seafood and that it is locally produced
- To commit to the health and safety of the people working in the industry

There are few practices that are different between organisation type.

Practices	Industry Association	Business
Strong biosecurity, food safety and handling	X	
To enhance market opportunities	X	
Demonstrating (and being recognised for) the contribution the industry makes	X	
Providing high quality/fresh/tasty products		X
Innovative, modern and technologically advanced		X
Connecting to, and serving communities		X

Looking at the different sectors

Wildcatch organisations

Aquaculture organisations

Organisations that do both

Wildcatch organisations: Where the similarities and differences lie in Values and Practices

	Value	% WC orgs (n=22)
Different to stated practices	Sustainability of the environment and natural resources, "pristine environment"	100
	Providing high quality/fresh/tasty products	64
	Connecting to, and meeting expectations of consumers/customers	59
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	45
	To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	41
	To be a strong voice/advocate, demonstrate leadership and influence	41
	To be active in research and collaborate with researchers and students	32
	Economic importance and sustainability including employment	27
	Innovative, modern and technologically advanced	27
	Demonstrating (and being recognised for) the contribution the industry makes	27
	Transparency, honesty, open communication	27
	Practices	% WC orgs (n=21)
Different to stated values	Sustainability of the environment and natural resources, "pristine environment"	86
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	76
	To be active in research and collaborate with researchers and students	43
	Connecting to, and meeting expectations of consumers/customers	38
	Providing high quality/fresh/tasty products	33
	To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	33
	Sharing information (about the industry, business, products)	33
	Innovative, modern and technologically advanced	29
	To build industry and organisational capacity, provide professional development	29
	To engage in fisheries/aquaculture management and policy processes	29

Aquaculture organisations: Where the similarities and differences lie in Values and Practices

		% AQ orgs (n=5)
	Values	
Different to stated practices	Sustainability of the environment and natural resources, "pristine environment"	100
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	80
	Providing high quality/fresh/tasty products	60
	Economic importance and sustainability including employment	60
	Strong biosecurity, food safety and handling	60
	To be a strong voice/advocate, demonstrate leadership and influence	60
	To be active in research and collaborate with researchers and students	40
	To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	40
	Innovative, modern and technologically advanced	40
	To build industry and organisational capacity, provide professional development	40
	To enhance market opportunities	40
	Maintaining and increasing productivity, performance and reliable/consistent supply	40
	Profitability	40
	Healthy seafood	40
		Practices
Different to stated values	Sustainability of the environment and natural resources, "pristine environment"	100
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	100
	Providing high quality/fresh/tasty products	67
	To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	67
	Connecting to, and serving communities	67
	Strong biosecurity, food safety and handling	50
	Connecting to, and meeting expectations of consumers/customers	50
	Health and safety of people working in the industry	50
	Economic importance and sustainability including employment	33
	To be active in research and collaborate with researchers and students	33
	To build industry and organisational capacity, provide professional development	33
	To enhance market opportunities	33
	Maintaining and increasing productivity, performance and reliable/consistent supply	33
	Sharing information (about the industry, business, products)	33
	Transparency, honesty, open communication	33
Pride and passion for what we do	33	

Note: There were only 5 or 6 Aquaculture only organisations that stated Values or Practices

Aquaculture & Wildcatch organisations: Where the similarities and differences lie in Values and Practices

		% WC&AQ orgs (n=16)
	Values	
	Sustainability of the environment and natural resources, "pristine environment"	69
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	63
	Providing high quality/fresh/tasty products	56
	To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	38
	Connecting to, and serving communities	38
	To build industry and organisational capacity, provide professional development	38
	Supporting family/multigenerational/small businesses	38
	Connecting to, and meeting expectations of consumers/customers	31
	Sharing information (about the industry, business, products)	31
	Innovative, modern and technologically advanced	31
Different to stated practices	To be a strong voice/advocate, demonstrate leadership and influence	31
	Economic importance and sustainability including employment	25
	Maintaining and increasing productivity, performance and reliable/consistent supply	25
	The importance of the culture of the industry (livelihoods, history, cultural connection)	25
	Practices	% WC&AQ orgs (n=12)
Different to stated values	Sustainability of the environment and natural resources, "pristine environment"	67
	To collaborate, engage and build relationships (stakeholders, government, businesses, communities)	58
	To engage in fisheries/aquaculture management and policy processes	58
	Responsible practices and stewardship, commitment to improving. Including environmentally friendly harvesting practices, animal welfare, and social practices	50
	To build industry and organisational capacity, provide professional development	50
	Connecting to, and meeting expectations of consumers/customers	50
	Sharing information (about the industry, business, products)	42
	Providing high quality/fresh/tasty products	33
	Connecting to, and serving communities	33
	Economic importance and sustainability including employment	33
	Locally produced seafood/provenance	33
	Supporting family/multigenerational/small businesses	25
	Innovative, modern and technologically advanced	25
	Health and safety of people working in the industry	25
	Strong biosecurity, food safety and handling	25

Whether wildcatch,
aquaculture
or both,
all organisations
agree on these
Values:

- The sustainability of the environment and its natural resources is paramount, and our seafood is sourced from a pristine environment
- The industry is committed to responsible practices and stewardship, and will continue to improve
- The industry provides high quality, fresh and delicious seafood
- The industry values collaboration, engagement and their relationships with stakeholders, government, businesses and communities
- The industry wants to be a strong voice and advocate, to demonstrate leadership and have influence
- The industry is economically important and provides employment, and seeks to be sustainable in the long term
- The industry is innovative, modern and technologically advanced

However, the Values are different between sectors.

Values	Wildcatch	Aquaculture	Wildcatch & Aquaculture
Connecting to, and meeting expectations of consumers/customers	X		X
To be active in research and collaborate with researchers and students	X	X	
Demonstrating (and being recognised for) the contribution the industry makes	X		
Transparency, honesty, open communication	X		
Strong biosecurity, food safety and handling		X	
To build industry and organisational capacity, provide professional development		X	X
To enhance market opportunities		X	
Maintaining and increasing productivity, performance and reliable/consistent supply		X	X
Profitability		X	
Healthy seafood		X	
Connecting to, and serving communities			X
Supporting family/multigenerational/small businesses			X
The importance of the culture of the industry (livelihoods, history, cultural connection)			X
Sharing information (about the industry, business, products)			X

- Aquaculture organisations value Biosecurity and Food safety, Profitability, and the Healthy nature of seafood.
- Wildcatch organisations value Transparency.
- The organisations that do both value the connection to community, supporting family businesses, and the cultural importance of the industry.

Whether wildcatch,
aquaculture
or both,
all organisations
participate in these
Practices:

- The sustainability of the environment and its natural resources is paramount, and our seafood is sourced from a pristine environment
- The industry is committed to responsible practices and stewardship, and will continue to improve
- The industry strives to connect to and meet the expectations of seafood consumers and customers
- The industry provides high quality, fresh and delicious seafood
- The industry values collaboration, engagement and their relationships with stakeholders, government, businesses and communities
- The industry is committed to sharing information about the industry, business, and products
- Building industry and organisational capacity, and provide professional development

However, the Practices differ between sectors.

Practices	Wildcatch	Aquaculture	Wildcatch & Aquaculture
To be active in research and collaborate with researchers and students	X	X	
Innovative, modern and technologically advanced	X		X
To engage in fisheries/aquaculture management and policy processes	X		X
Connecting to, and serving communities		X	X
Strong biosecurity, food safety and handling		X	X
Health and safety of people working in the industry		X	X
Economic importance and sustainability including employment		X	X
To enhance market opportunities		X	
Maintaining and increasing productivity, performance and reliable/consistent supply		X	
Transparency, honesty, open communication		X	
Pride and passion for what we do		X	
Locally produced seafood/provenance			X
Supporting family/multigenerational/small businesses			X

- Aquaculture organisations can focus their practices on enhancing markets, focussing on productivity, and showing transparency and pride in what they do.
- The organisations that do both can focus their practices and emphasise provenance and local seafood, and support family businesses
- Wildcatch organisations share their practices of research, innovation and engaging with policy, with other sectors

Appendix C – Pre-Workshop Information

Our Pledge is a commitment to the community. It considers issues the community holds as important and presents the seafood industry position and perspective. We will be held accountable to Our Pledge, and in many cases we are already actively addressing the issues. Our Pledge gives us a way to succinctly communicate with the community and to inform them of our values and practices. It also helps us focus our efforts to meet community concerns including establishing areas where we need more research or greater uptake of existing research and best practice.

Our Pledge is our response to our members call for action on social licence.

We need to get the right balance in Our Pledge. It needs to be achievable but not just a “business as usual” statement. Taking that approach is unlikely to cut through with the community.

Our Pledge is based on the successful Seafood NZ “Promise”. The Promise comes with a PR campaign, regular monitoring of community attitudes and an annual stocktake and score card. We aim to have similar related activities to take our message to the community and to demonstrate that Our Pledge is real and not just marketing puff. I encourage you to have a look at “The Promise” ([link here](#)) to see the bigger picture of where this initiative is heading.

In preparation for the Members’ Forum on 27 September, please consider the following questions.

- How do you think the seafood industry is viewed by everyday Australians?
- What about your business and sector of the industry? What do you think people think of what you do?
- What benefit would there be in developing a more positive view of our industry?
- What specific issues do you think the community seeks reassurance about us on?
- How might a pledge to the Australian public affect community perceptions now and into the future?
- What might the pledge say?
- What words should be in a pledge that you could make and commit to?

Appendix D – Community Sentiment – benchmarking and Pledge evaluation: Market Research Report (Essence Communications)

Community Sentiment - benchmarking and Pledge evaluation

Market Research Report

Seafood Industry Australia

September 2019

FINAL

Essence Communications

Strategy, Research and Stakeholder Engagement

14-16 The Avenue

East Malvern Victoria 3145

Tel (03) 9572 4125

www.essencecomms.com.au

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1 Executive Summary

In August 2019, Essence was engaged by Seafood Industry Australia (SIA) to undertake a research program to help inform the development of a pledge to the Australian community and provide a benchmark of community sentiment towards the Australian seafood industry.

The research comprised a mix qualitative and quantitative methodology of n=2 focus groups and a quantitative survey completed by n=1951 Australians aged 18 years and over across Australia providing a nationally representative sample.

The research identified 16 key findings in relation to community sentiment towards Australia's Seafood Industry and in evaluating the opportunity for its Pledge:

- 1 There appears to be a good understanding of ethical practice and what this means
- 2 There is low awareness of the Australian Seafood Industry and how it operates
- 3 There are mixed perceptions of the seafood industry and its focus on ethical and sustainable practice
- 4 Those who know more about the seafood industry, who buy Australian seafood and who consume seafood regularly are more positive
- 5 "Our Pledge" offers a good opportunity to further enhance perceptions and community understanding of the seafood industry
- 6 The commitment made in "Our Pledge" must be clear and concise
- 7 There are high expectations when it comes to caring for the environment
- 8 Participants agree that primary producers and workers should be looked after and their sense is that they are
- 9 Having regard for animal welfare is viewed positively
- 10 The opportunity is to promote transparency and accountability when it comes to complying with the law
- 11 Participants value a level of responsiveness to community concern about how the industry is behaving
- 12 Continuous improvement is viewed as being essential to identifying ways to do and be better
- 13 Stories about the industry, its people and how it works would be highly regarded
- 14 Expectations of proof that the industry is living "Our Pledge" reflects the areas of importance: environment, respecting animals and sustainability
- 15 The role of Marine Parks is relatively unknown
- 16 "Our Pledge" has the potential to positively influence seafood buying behavior

The combined qualitative and quantitative data provides valuable context about attitudes of the Australian community and sentiment towards the Australian seafood industry. In relation to other industries, the seafood industry is considered relatively responsible when it comes to doing the right thing and Australians perceive it to have a reasonably good reputation. However, there is little knowledge about how the seafood industry operates which contributes to a sense of uncertainty when it comes to the specifics of what it is doing in key areas of expected performance.

When asked to rate the seafood industry in terms of how it is performing in the most important areas of preventing animal cruelty, respecting animals, caring for the

environment and ensuring future stocks, only just over a third of Australians perceive it to be doing a good or very good job. Further, on average 20% of Australians couldn't rate the seafood industry on these key indicators of performance as they "Didn't know" and on average 43% chose a neutral view. With a growing interest and awareness in our primary producers and how they operate, there is an opportunity to address this lack of knowledge of the industry and its commitment to positive social, economic and environmental performance.

"Our Pledge" has the potential to provide a strong and engaging message about the Australian seafood industry and the work it is doing as responsible and environmentally focused primary producers. The research showed an interest in connecting with the primary producers of the seafood industry, to hear stories about the people, their commitment to the environment, their care and respect for the animals they interact with and the journey they take to put the highest quality seafood on their tables.

The opportunity to improve however requires the seafood industry to choose the key areas that it considers important and its objectives or targets. These targets might be determined relative to the investment expected to be made to improve in those areas of greatest importance. For example, if we set a target of 50% of Australians believe we are doing well or very well, based on our current benchmarks of around 35% we have substantial room to improve perceptions across all key areas. *And this may be more about communication than actual practices given the general lack of knowledge about the sector...*

Research funded through:

- An Australian Government grant program, *Marketing the Australian seafood industry – demonstrating our commitment to long-term sustainability and environmental responsibility*; and
- The FRDC program, *Our pledge: Australian seafood industry response to community values and expectations*

2 Introduction

In August 2019, Essence was engaged by Seafood Industry Australia (SIA) to undertake a research program to help inform the development of a pledge to the Australian community and provide a benchmark of community sentiment towards the Australian seafood industry. The objectives of this research were to:

Qualitative

- investigate perceptions of the seafood industry
- explore the language of “Our Pledge”
- discuss expectations of the action in delivering on “Our Pledge”
- understand perceptions of potential opportunities for the seafood industry to deliver better outcomes for the industry and the community into the future

Quantitative

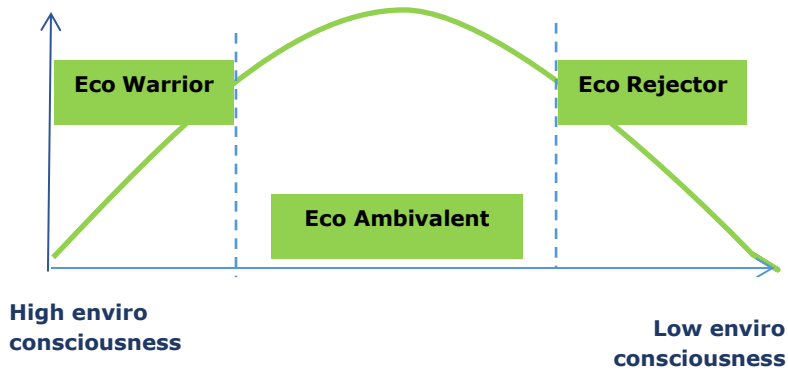
- benchmark attitudes and perceptions of the seafood industry
- confirm the language of “Our Pledge” that most resonates
- rank the perceived importance of the action to be taken that will best deliver on “Our Pledge”
- understand the influence of “Our Pledge” on consumer behaviour
- establish awareness and understanding of the role and impact of Australian Marine Parks

Given the qualitative and quantitative nature of the research objectives, a mixed methodology was recommended including focus groups and an online survey.

The qualitative research sought to focus the discussion by ensuring participants have a general understanding of the seafood industry and could therefore provide more insight into the opportunities for “Our Pledge” than those who had no context or knowledge of the industry.

Based on our experience in researching attitudes towards the seafood industry we understood there are sub cohorts within the target audience of the general community who might have a greater understanding of the industry on the basis of two key factors:

- **Consumption of seafood** – we sought to include those who consume seafood at least once a week or more and exclude those who do not consume seafood as they are less likely to be willing and less able to engage in a conversation about the seafood industry. We therefore recruited participants who are regular seafood consumers (consume seafood as a main meal once a week or more) in the sample.
- **Environmental consciousness** – we sought to include those whose attitude towards a key issue of relevance to the seafood industry, the environment, reflected the vast majority of the population. As outlined below this is the Eco Ambivalent who are not engaged either positively or negatively with the environmental discussion and who are most likely to be the larger population and most representative of the general community. We sought to exclude those who are highly engaged and advocate for environmental issues as well as those who are not at all environmentally conscious and reject the need to consider a more sustainable and environmentally friendly future to ensure a more balanced discussion about the opportunities for the seafood industry when it comes to the environment.

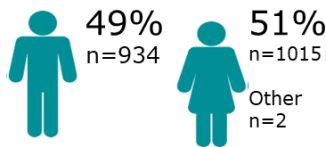


The specification included:

Group	Target Audience	Specification
1	People aged 18-54 years old with no children	n=1 focus group mix of males and females
2	People who have school aged children at home	n=1 focus group mix of males and females

The quantitative survey was completed by n=1951 Australians aged 18 years and over across Australia providing a nationally representative sample. The survey was approximately 15 minutes in duration and included a series of closed questions and 3 open ended questions. It was administered to a panel of research respondents using panel provider CanvasU.

Survey profile



18-34	29%	(n=527)
35-54	35%	(n=708)
55+	36%	(n=716)

Special audiences	
Indigenous	4% (n=73)
You or either/both of your parents were born overseas	24% (n=478)



Location		
Sydney	21%	(n=408)
Other NSW	12%	(n=229)
Melbourne	20%	(n=382)
Other VIC	6%	(n=111)
Brisbane	10%	(n=196)
Other QLD	10%	(n=194)
Adelaide	5%	(n=100)
Other SA	2%	(n=37)
Perth	8%	(n=151)
Other WA	2%	(n=43)
Hobart	1%	(n=19)
Other TAS	1%	(n=25)

Please note that an arrow in the data indicates a difference in the data that is statistically significant in terms of more or less when compared with the full sample.

Research funded through:

- An Australian Government grant program, *Marketing the Australian seafood industry – demonstrating our commitment to long-term sustainability and environmental responsibility*; and
- The FRDC program, *Our pledge: Australian seafood industry response to community values and expectations*.

3 Key findings

3.1 Awareness and understanding of ethical practice

3.1.1 There appears to be a good understanding of ethical practice and what this means

Most participants in the qualitative research had a good understanding of what it means to do 'the right thing' as an organisation or industry and could identify the key indicators that highlight who or what is behaving in an ethical way. Most believed that organisations or industries that are doing the right thing are being led by an individual who is passionate and personally committed to ethical behavior.

"It's the CEO, I think she donated a chunk of whatever she got from tax to environmental projects. So they're really into the environment."

"From the CEO basically, he is into all those adventure things, like he loves skiing, he loves mountaineering. So he loves the environment. So in order for the company to be ethical, he wants the employees to be ethical, too. So he gets them involved into these activities so they can see too."

When asked to identify an organisation or industry that is known for doing the right thing, participants nominated those who:

- look after the people who manufacture or farm – e.g. Fair trade, paying farmers or workers a reasonable price for their product, good working conditions and safety
- donate to charity – eg. give to those in need, support a cause - particularly if it aligns with their product or service offering
- make environmentally friendly decisions – eg. have minimal impact on the environment, minimal waste and emissions and promote this behavior in others
- support the local community – eg. create local jobs, be engaged in local community initiatives, have a positive impact on the local community and environment

"Generous, and kind of mindful with how they're getting our products."

"Making not just ethical decision about one thing like the animals but all things that could be impacted."

"I think of Woollies who were the first ones to ban the plastic bags. And also because of their drought relief for families. That's what I think of."

After some prompting, participants agreed that there are range of actions and behaviours that demonstrate an organisation or industry is committed to doing the right thing. They agreed that the following are strong signs of a responsible entity:

- caring for the environment – not just making environmentally friendly decisions but having an interest in how it is treated and managed
- using practices that ensure future stocks – focusing on the sustainability of the industry and continued supply of the product
- caring for and respecting animals – treating animals fairly, preventing animal cruelty and giving consideration to their well being
- ensuring compliance with the law – making sure operators are not breaking the laws that are there to protect the environment, people and animals

Participants agreed but to a lesser degree that the following actions/behaviours demonstrate that the organisation or industry is doing the right thing:

- listening to the community – making efforts to understand what the community think and feel about the way their industry or organisation operates and taking onboard feedback
- looking for ways to do things better – being innovative, researching and considering opportunities to do things differently to improve outcomes
- ensuring food is safe for human consumption – choosing healthy and safe practices when making food products eg. no hormones, chemicals, 'dodgey' practices. There is however a basic expectation that food approved for sale is safe

They understand however that few do all of these things – in fact, they may do some to offset the fact that they're not doing others.

"Let's say tomorrow Adidas is making goods, using the reusable stuffs, plastics and stuff, to make clothes. That's sort of like having a good impact on the environment, but then if they're not paying the workers, the common workers in those developing countries. So they're not being consistent. They're doing something good for the environment, but then not doing good enough for the community."

They also note that within an industry, there are always operators who do a really good job at these things and others who don't and so it may be difficult to assess an industry as a whole.

"It's hard to say if the industry is ethical because there is always one farmer who doesn't do the right thing."

"It'll depend on the farmer I think."

Few participants could confidently name an organisation or industry that is genuinely operating in an ethical and sustainable way with some suggestions including Nike, Oxfam, Farmers Union milk, Patagonia, Woolworths, John DeBeer and Grill'd for a range of reasons. The fishing industry was nominated by one participant without prompting as an industry that they believe is more sustainable and focused on operating ethically.

"Yeah, it's just certain industries do it and I guess there are certain certifications a place can have, about whether they've caught and fished in a sustainable manner."

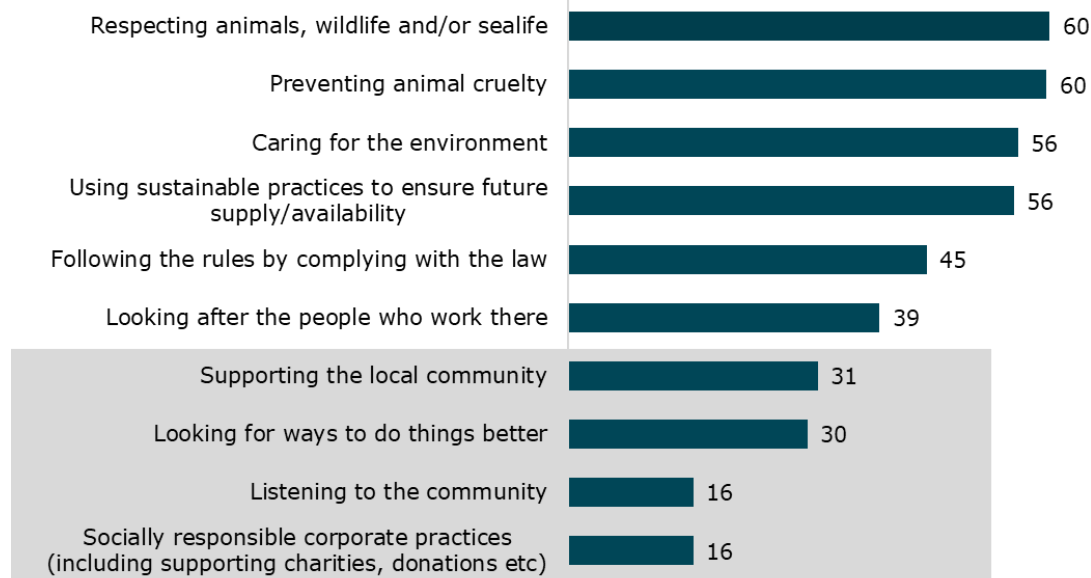
Some participants suggested that there is an increased cost in doing the right thing – that it costs more to be ethical and to operate in a way that reflects good practice and a positive contribution to the environment and the community. They believe this cost is passed onto the consumer potentially making more sustainable and ethically produced goods and services unaffordable for some.

There is some skepticism about the authenticity of certification, ticks or stamps that make claims of environmentally friendly, ethical or organic practices with some suggesting that these programs lack integrity and genuine compliance or that the tick of approval or accreditation can be bought.

"No, I'm sceptical, because even with the health star rating that they introduced, the company has to actually buy that. So you have to buy into the program to get that stamp onto your label. And there was in the news maybe a year ago there was a bit of uproar because there was some really unhealthy products that managed to get the health star rating. So then the company has to actually pay for that stamp of approval, so it's like, "Are they even that ethical?" if they're paying for it."

The quantitative research showed that when prompted with a list of things that might indicate doing the right thing, respecting animals, preventing animal cruelty, caring for the environment and sustainability are considered the most relevant indicators:

Q3. When it comes to an industry, organisation or employer working in the area of primary produce or farming, what does it mean to be doing the "right thing" Shows %

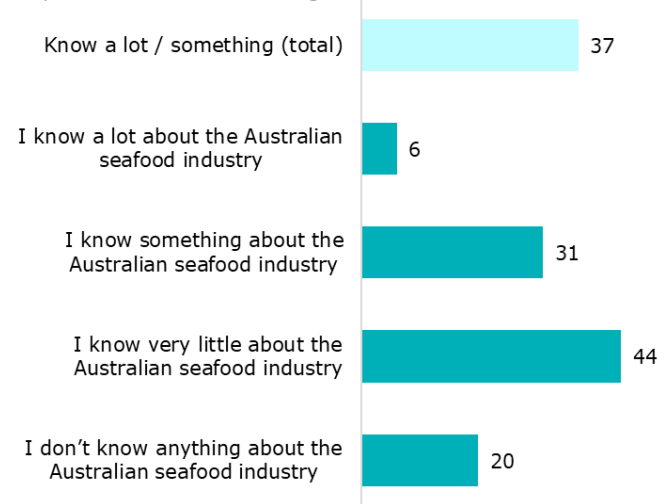


2019 SIA Survey, General population (n=1951)

3.1.2 There is low awareness of the Australian Seafood Industry and how it operates

The quantitative research showed that knowledge about the Australian Seafood Industry is low with 64% of Australians saying they know very little or nothing about it.

Q4. Thinking specifically about the Australian seafood industry, both wild-catch and farmed seafood, how much do you know about it? Showing %

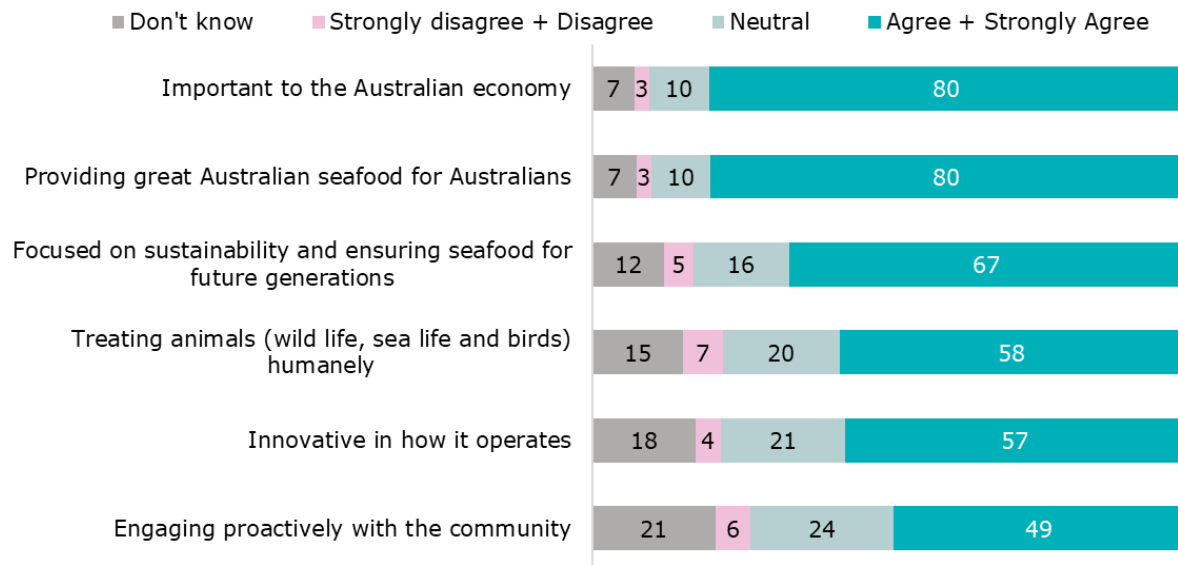


2019 SIA Survey, General population (n=1951)

Despite this, the quantitative research showed that around 80% believe the seafood industry is important to Australia's economy and that it provides great Australian seafood

for Australians. Two thirds believe it is focused on sustainability and 58% believe it treats animals humanely.

Q8. Still thinking about the Australian seafood industry, both wild-catch and farmed seafood, to what extent do you agree... Showing %



2019 SIA Survey, General population (n=1951)

3.1.3 There are mixed perceptions of the seafood industry and its focus on ethical and sustainable practice

When it comes to primary industries, the qualitative research showed that perceptions of those that are more responsible varied however they were consistent in identifying the seafood industry as one of the most responsible.

Given the sample, there was a mix of knowledge and interest in the seafood industry and its practices with some engaged and others quite disinterested. Those engaged participants had researched the industry, were familiar with the practices of wild catch fishing and pole and line fishing versus aquaculture and sought out information about those suppliers operating ethically and bought accordingly. Others had no awareness or interest in better understanding the industry that provides seafood and what it means for the fish they consume.

"I buy Sirena, the brand of tuna. They make a point about their fish, or their tuna, is caught with a pole and line, as opposed to like big."

"I had a look at the website – not sure which one but there is information about which are the good companies."

The availability of information about sustainable practices and responsible suppliers – even for those who have not accessed it – provides a strong assurance that the industry is doing the right thing.

When asked what the seafood industry could improve upon, participants were unable to specifically identify something that the industry, as a whole, needs to address. Upon consideration, the key areas nominated for improvement were:

- Making sure other sea life such as dolphins, don't get caught up in nets
- Not injuring the seafood during harvest

- Being more transparent about how they operate
- Ensuring people aren't overfishing and that there is plenty of stock

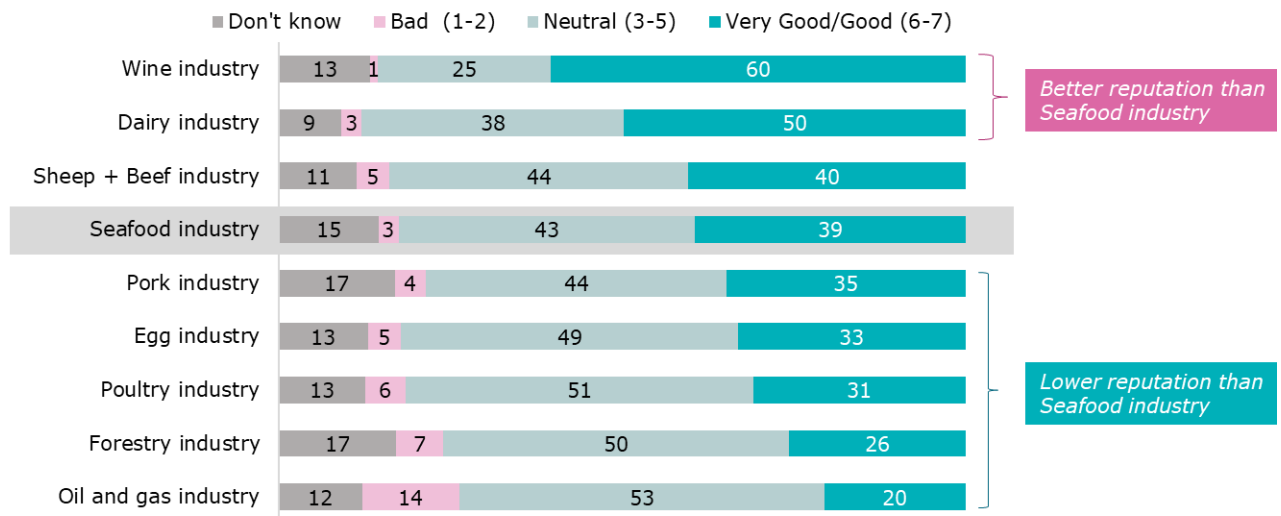
There are mixed views on which ways of fishing are "better", are more sustainable and produce higher quality products with the more engaged participants suggesting that ethical practices of wild catch fishing such as pole and line and monitoring stocks ensures sustainable fishing and quality fish and others believing the sustainability of fish farming protects the ocean population and provides quality controls.

A few suggested that aquaculture may be susceptible to poor farming practices by profit driven farmers resulting in lower quality fish, mistreatment of the fish and damage to the environment. Most acknowledged that most farmers worked responsibly as they understood that it resulted in a better quality product and more income.

Overall the qualitative research indicated that the seafood industry is perceived to be operating well against the key performance indicators of what makes an ethical and sustainable primary producer – particularly in comparison to the other primary producers in Australia. However the quantitative research varied from this.

The quantitative research shows that 39% of the general population believe that the seafood industry has a good/very good reputation – ranking it equal third in a list of industries in Australia, behind the wine industry (60%), the dairy industry (50%) and equal to the sheep and beef industry (40%). It should also be noted that 15% of respondents did not know enough about the industry to rate its reputation.

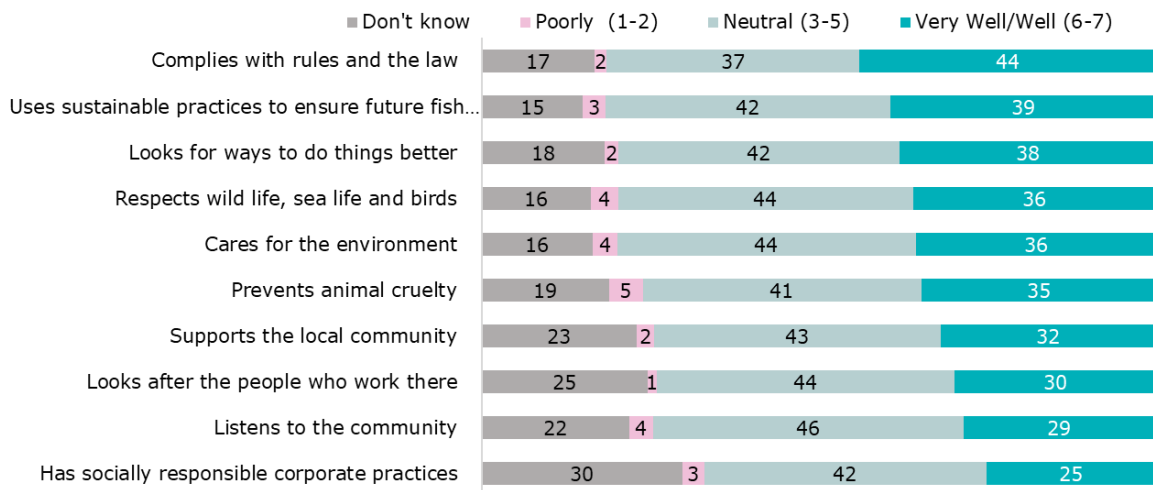
Q2. How would you rate the overall reputation of each of the following industries in Australia Showing %



2019 SIA Survey, General population (n=1951)

However, the quantitative study showed that the general public is largely uninformed and unsure of the performance of the seafood industry against the indicators of doing the right thing. As outlined below, on average 20% of Australians couldn't rate the seafood industry on the key indicators of performance as they "Didn't know" and on average 43% chose a neutral view (3, 4 or 5 out of a possible score of 7).

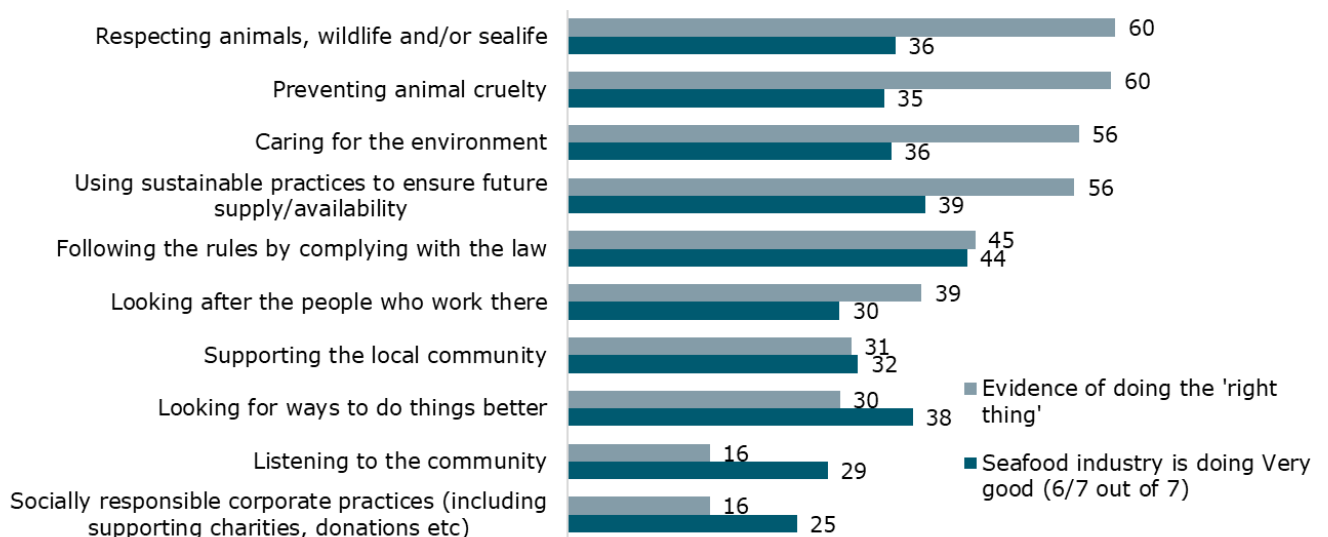
Q7. How would you rate the seafood industry in terms of how well it does the following?
Showing %



2019 SIA Survey, General population (n=1951)

When looking at the key areas that best demonstrate doing the right thing, preventing animal cruelty, respecting animals, caring for the environment and ensuring future stocks, the seafood industry is perceived to be doing a good or very good job by just over a third of Australians. Interestingly the seafood industry is considered to be performing well in comparison to the perceived importance in the areas of supporting the local community, looking for ways to do things better, listening to the community and being socially responsible.

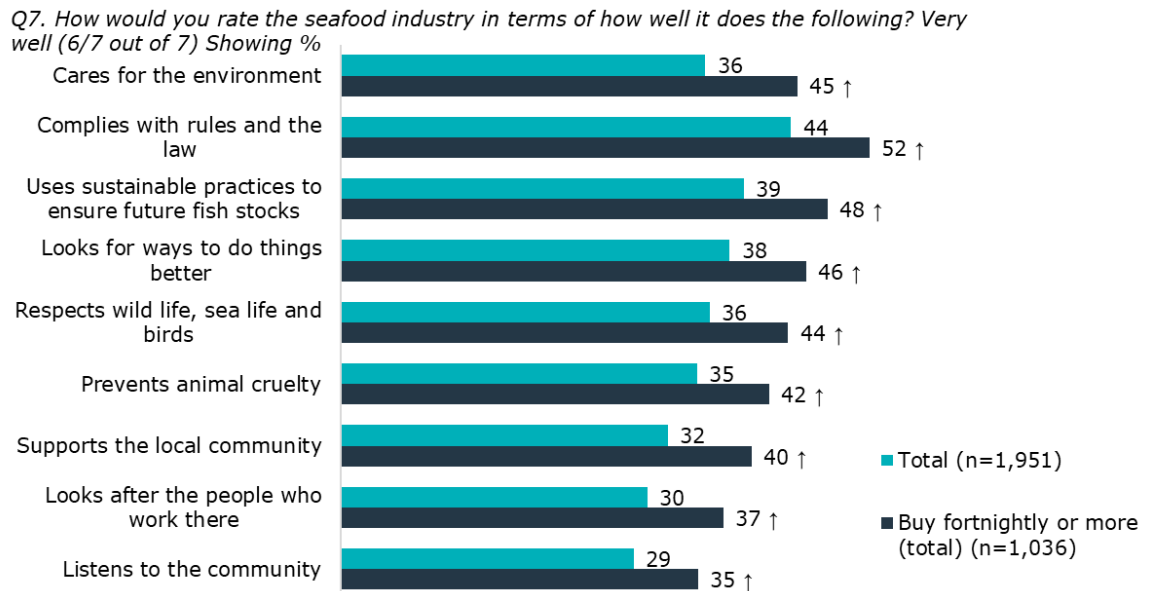
Q3. When it comes to an industry, organisation or employer working in the area of primary produce or farming, what does it mean to be doing the "right thing"?
Q7. How would you rate the seafood industry in terms of how well it does the following? Very good (6/7 out of 7)
Showing %



2019 SIA Survey, General population (n=1951)

3.1.4 Those who know more about the seafood industry, who buy Australian seafood and who consume seafood regularly are more positive

Perceptions of the seafood industry are somewhat more positive for those who claim to know more about the seafood industry, who buy Australian seafood and/or who consume seafood at least once a fortnight or more often. This applies across all indicators of performance with 45% of those who consume seafood regularly believing it does a good/very good job caring for the environment compared with 36% of the general population.



2019 SIA Survey, General population (n=1951)

3.2 “Our Pledge”

3.2.1 “Our Pledge” offers a good opportunity to further enhance the seafood industry

Given the focus groups participants had a relatively positive assessment of the seafood industry and viewed it as well regarded with a good reputation for operating responsibly, participants didn’t see an urgent need for the industry to make a commitment to be better. However, they agreed that it is important to continue to be focused on doing the right things.

The proposal of a pledge reinforces the view that the seafood industry is leading the way in ethical and responsible practice amongst primary producers

“Yeah, and I think where they’re already great which gives them a good chance to be like, “We’re an industry that’s already seen as really good, let’s keep up the good work and show that we can be better”. Because a lot of the other animal industries don’t have very good reputations.”

Participants who eat fish regularly were more interested in “Our Pledge” and what it meant for the food that they choose to buy and consume.

"I probably eat seafood, and by that, I mean usually fish, more than any other meat. So it would be good to have something like that."

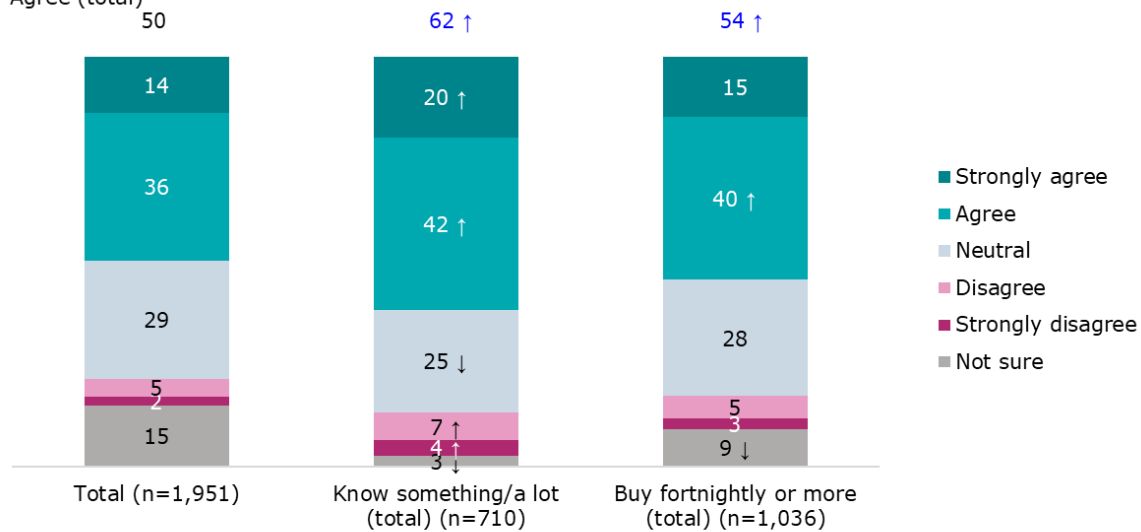
They believed that the concept of a pledge to do better is appealing however question its enforcement or proof that it's being delivered.

"I guess the number one thing would be transparency. Because they could say they do all of those things, but if an independent person couldn't come and check them, it would almost be better if they didn't say anything. But let someone independent come in and said, "Take a look at what we do", and the independent person tell people."

"I think, especially with seafood farming, say for instance it was sustainable farming, a lot of people, including myself, don't actually know what it is. So even just basic photos of, "This is what our farms look like, this is how we get the water".

In the quantitative study, just half of Australians (50%) agree or strongly agree that the seafood industry needs to do more to improve its positive social, economic and environmental performance. 44% are non-committal about this choosing neutral or not sure. As per the qualitative research, expectations of the industry are higher amongst those closest to it – 62% of those who know something or a lot believe there is opportunity to improve as do 54% of those who buy seafood fortnightly or more often.

'Q9. To what extent do you agree/disagree that the Australian seafood industry needs to do more to improve its positive social, economic and environmental performance. Showing % Agree (total)



2019 SIA Survey, General population (n=1951)

3.2.2 The commitment to doing better must be clear and concise

The key areas put forward in "Our Pledge" were considered to be the right ones and overall, participants wanted to see these expressed in actions in a clear and simple way – but WHAT does that actually mean?

"Well the words are great - but I don't really know what that means."

Participants agreed that there is an opportunity to tell more stories about the seafood industry and how they operate to help demonstrate how they are fulfilling and living up to such a pledge.

"I think it's Coles, they do those stories where they quickly interview the owners of the farm where they source their strawberries from. It's those things that really help to give it a human storytelling thing, that makes it more interesting and more meaningful than a tick. Then we'd be like, "That's Barry, who goes and cleans out the fish." I don't know what it is they do. It gives it a sense of authenticity, to have those photos."

Overall participants agreed with the introductory statement of "Our Pledge" and its explanation of who it is from (the Australian seafood industry) and its focus on the future and sustainability with its reference to future generations.

Responses to the statements in the focus groups were as follows and are in order of preference:

Statement	Response
We are the Australian seafood industry and we are committed to putting great Australian seafood on your table now and for generations to come.	This is the most preferred statement as it is clear and concise and easy to understand. It also reinforces Australian seafood as compared to local . There was a preference for best instead of great .
We are the Australian seafood industry and we are committed to putting great local seafood on your table now and for generations to come.	This was the second preferred statement as a clear and concise option. For some, the suggestion of local seafood is a little confusing – particularly if they don't live in an area that produces seafood.
We are the Australian seafood industry and we are committed to keeping the local seafood we love on your table now and for generations to come.	Local seafood we love was considered a bit "over the top" with some suggesting that not everyone loves seafood.
We are the Australian seafood industry and we are committed to putting more safe, delicious, fresh Australian seafood on your table now and for generations to come.	Some suggested this statement was a bit cluttered and a little clumsy with more safe . It may also be too descriptive with delicious and people also understood that seafood is not always fresh but frozen but also good quality.
We are the Australian seafood industry and we are committed to providing great local seafood for your family forever.	This was the least preferred statement with participants suggesting the focus on generations to come provides a much clearer future focus than your family forever with the reference to family being too narrow compared with society in general and forever overpromising.

The quantitative research reinforced this with the following results:

Column %	#1	#2	#1/#2
A - We are the Australian seafood industry and we are committed to putting the best Australian seafood on your table now and for generations to come.	42 ↑	33	74 ↑
A - We are the Australian seafood industry and we are committed to putting great local seafood on your table now and for generations to come.	32	29 ↓	61 ↓
A - We are the Australian seafood industry and we are committed to putting great Australian seafood on your table now and for generations to come	26 ↓	38 ↑	64 ↓

3.2.3 There are high expectations when it comes to caring for the environment

Participants were familiar with and understood the full range of considerations that contribute to acting responsibly when it comes to the environment and have high expectations that those who claim to be environmentally friendly address all of them.

"Yeah, if the industry needs to change to keep the world alive, then the industry should change."

"Minimal wastage and emissions, that's what that means."

"If you're thinking of environmental impact, then beef would definitely be at the bottom, because of the resources that are needed to keep the cattle industry going, for what you actually get out of it."

"As in making sure that there are enough resources for the coming generations to use. Not using up all the natural resources that are available."

Caring for the environment	
Statement	Response
Actively care for Australia's oceans and environment and encourage others to do the same	Participants agreed with this action and the inclusion of actively as a greater investment in taking care. They particularly valued the commitment to encourage others to do the same which demonstrates a broader appreciation for the importance of the oceans and environment in the seafood industry and that others also use it. There was some discussion on the exclusion of other waters which are a source of seafood (eg. rivers and farms) with the suggestion that waters be added to the statement however some believed that environment was all inclusive.
Actively protect our oceans, coastlines and environment and inspire others to do the same	This statement was also well supported however care was considered more proactive than protect which seemed defensive. There were differing views on the benefit of inspire (ie. Lead by example) over encourage (ie. Promote and influence) with no real conclusion about which was better or more achievable. This statement also excluded other waters as above.
Actively care for Australia's waters and environment and encourage others to do the same	As above.

Caring for the environment	
Statement	Response
Pro-actively care for Australia's oceans and environment and encourage others to do the same	For this statement, pro-actively was not seen to add anything more than actively so was considered an unnecessary pre-fix.
Care for Australia's oceans and environment which we rely on, and work with others to do the same	Participants didn't rate this one highly with which we rely on... considered superfluous and a little clumsy.
Continue to lead the world in fisheries management	This was not understood within the context of the environment and rated the least preferred. Few understood the term fisheries management .

The quantitative research reinforced this with the following results:

Column %	#1	#2	#1/#2
B - We actively care for Australia's oceans and environment and work with others to do the same	39 ↑	34	73 ↑
B - We actively protect our oceans and environment and encourage others to do the same	34	29 ↓	64 ↓
B - We actively care for Australia's oceans and environment and encourage others to do the same	27 ↓	36 ↑	63 ↓

3.2.4 Participants agree that primary producers and workers should be looked after and their sense is that they are

An industry that values their workforce and treats them fairly is well regarded with participants rating this as very important. However they currently have little insight into how the seafood industry treats its members and based on a lack of information to the contrary believe that they must be relatively happy and safe.

"Fair wages. That's a big thing."

"I wouldn't know about safety... I assume they are safe. You don't hear much about it, do you?"

Caring for our people	
Statement	Response
Value our people, look after them and keep them safe	This statement was considered positive, proactive and concise. Participants appreciated the commitment to value our people and look after them which both communicate a genuine interest in their well being. Keep them safe is also a well regarded concept and promotes care and safety.
Ensure our people are valued and safe	This statement was also positively received as above however not as preferred.

Caring for our people	
Statement	Response
Value our people and look after them	Without the inclusion of keep them safe this statement did not promote the serious responsibility of workplace safety that the community expects from employers.
Look after our people and keep them safe	As above however participants preferred the inclusion of value .
Value our people, look after them and keep them safe, to return to their families at the end of the day	This was liked however considered a little lengthy and perceived to be a WorkCover message.

The quantitative research reinforced this with the following results:

Column %	#1	#2	#1/#2
C - We value our people, look after them and keep them safe	35	40 ↑	75 ↑
C - We ensure our people are valued and safe	31 ↓	20 ↓	51 ↓

3.2.5 Having regard for animal welfare is viewed positively

Participants indicated that industries that have respect for the animals they farm or harvest and those animals that they come into contact with during the process of farming or harvesting, are more likely to be of good character. They understand that the animals are being farmed for consumption and therefore don't expect practices that overcompensate however they do want to see respectful behaviour that shows regard for animal welfare.

"Care for? We eat them!"

"So it means, like the boat goes out and we don't catch everything in the net and just slaughter it. We don't just catch everything and then discard it."

"I know that it's about leaving not only minimal impact, but making sure that after they do their business the rest of the ocean life is not affected. So that's really important."

Caring for the animals	
Statement	Response
Respect the seafood we harvest and the animals we interact with	This statement was viewed positively with respect considered an appropriate way to explain a commitment to being careful with the living things the industry come into contact with. It generated much discussion about the difference between seafood that is harvested and other animals that may be affected by the process of harvesting. It was of interest to those who hadn't yet considered this. For some the term animals was confusing and there was a preference to be more specific by referencing sea and wild life instead. Participants were unsure of the use of

Caring for the animals	
Statement	Response
	interact with which they thought suggested a relationship of sorts however understood the concept and could not offer an alternative.
Treat animals we interact with respectfully	The use of respectfully was considered a straightforward and easy to understand concept and well regarded.
Care for the animals we interact with	Some participants believed the use of care was too much and that this is an overstatement considering "we eat them!"
Respect and treat humanely the animals we interact with	Participants preferred respectfully over humanely .
Treat the animals we interact with respectfully and humanely	As above

The quantitative research reinforced this with the following results:

Column %	#1	#2	#1/#2
D - We respect the seafood we harvest and the wildlife we interact with	41 ↑	29 ↓	69 ↑
D - We respect and treat humanely the animals we interact with	33	36 ↑	69 ↑
D - We treat all the creatures we interact with respectfully	27 ↓	35	62 ↓

3.2.6 The opportunity is to promote transparency and accountability when it comes to complying with the law

Participants agree that ethical industries comply with the laws that are in place to protect people, animals and the environment. They have a base level expectation however that those who are making a commitment to do better in this area, not only comply but publicly share their transgressions and show what is being done to address them. Having said that, they don't see the seafood industry as particularly problematic when it comes to law enforcement.

"Something like you're saying accountable, so the company is transparent and they keep others accountable, or they keep the industry accountable."

"I didn't know there was a fight to be had."

Law and enforcement	
Statement	Response
Be accountable for our actions and those of our industry	Participants viewed this statement positively and appreciated it for its acceptance that those who don't do the right thing need to be held accountable .

Law and enforcement	
Statement	Response
Uphold rules and regulations and keep each other accountable	This again was positively viewed based on its acceptance of accountability with participants believing it could be strengthened through the addition of transparency .
Fight illegal activities and keep each other transparent and accountable	Participants did not perceive there to be a significant issue in law enforcement and so the use of fight was considered a little too aggressive and not warranted. However participants considered transparent a key word that should be incorporated into a statement made about ensuring compliance and law enforcement to demonstrate proof of this.
Not condone illegal activities	This statement was considered somewhat benign – participants believed that of course they don't condone illegal activities, they can't. It's a basic expectation. It also suggests the opposite has occurred in the past.
Support the fight against illegal activities and call out bad practices in our industry	As above in terms of fight . However, call out bad practices appeared to be supported as an industry that does not cover up poor behavior by its members.
Support compliance and enforcement	Participants explained that this statement did not offer sufficient information about its promise and was somewhat undefined.

The quantitative research reinforced this with the following results:

Column %	#1	#2	#1/#2
E - We are transparent in our practices and accountable for our actions	35	34	69
E - We are accountable for our actions and those of our industry	34	33	67
E - We uphold rules and regulations and are transparent in how we do this	31	33	64

3.2.7 Participants value a level of responsiveness to community concern about how the industry is behaving

There is a growing interest in having an opportunity to have a say and participants agree that industries that consider the community's point of view and perspective are more likely to be focused on ethical behavior. However they want to hear that their feedback and input might be taken onboard – not just received and noted.

"That sounds like they're just not going to do anything, just go, "Yeah, acknowledged."

Community engagement	
Statement	Response
Listen to, engage with and respond to community interests	Participants preferred this statement particularly with its reference to respond as it shows an interest in addressing feedback. However, they preferred concerns rather than interests as it suggests worthy worries as compared to personal agendas.
Listen to and respect community concerns	Participants agreed that this statement was clear and concise however doesn't indicate any response to the concerns which shows genuine community engagement.
Actively engage with the community and listen to their concerns	Participants like the reference to actively engage showing a greater commitment to hearing from the community however as above, this statement does not indicate action taken to address concerns.
Listen to and engage with community interests	This statement was considered a little clumsy with engage with community interests . As above the preference is towards concern over interests .
Always listen to and respect our community's concerns	Always may be an overpromise with participants understanding that you can't always do what people want.
Acknowledge community concerns	As above – lacks action.

The quantitative research reinforced this with the following results:

Column %	#1	#2	#1/#2
F - We actively engage with the community and listen to their concerns	44 ↑	32	76 ↑
F - We engage with and respectfully address community concerns	30 ↓	40 ↑	70 ↑
F - We respect and listen to the community	26 ↓	28 ↓	54 ↓

3.2.8 Continuous improvement is viewed as being essential to identifying ways to do and be better

Participants understood that a pledge is designed to improve practices and so the opportunity is to promote review, research and analysis to find opportunities to do and be better.

Continuous improvement	
Statement	Response
Continually improve practices	This is the preferred statement on the basis that it is clear and concise and shows a commitment to doing better through actions. The reference to improve is one that participants

Continuous improvement	
Statement	Response
	understood well in terms of being able to do better and they value this.
Recognise we can do things better and always seek to improve	This was viewed as a positive statement which demonstrates the industry understands its practices recognize we can do things better... and the inclusion of improve is supported.
Strive to do things better as an industry	This was considered a positive statement with aspirations of an industry that is working hard to improve through the use of strive .
Proactively look for ways to do things better	Proactively is seen as making a stronger commitment to continuous improvement which is highly valued.
Keep looking for ways to do things better	This is a positive statement which was appreciated for its proactive approach to improvement using the simple language of keep looking .
Keep evolving and doing things better	This was least preferred with evolving considered to be unnecessarily complicating the commitment to improve.

The quantitative research reinforced this with the following results:

Column %	#1	#2	#1/#2
G - We continually improve our practices	35	35	70 ↑
G - We keep looking for ways to do things better	34	34	68
G - We strive to do things better	31 ↓	31	62 ↓

3.3 Proof points for delivering on “Our Pledge”

3.3.1 Stories about the industry, its people and how it works would be highly regarded

There was an acknowledged lack of understanding about how the Australian Seafood Industry works that made participants uncomfortable with determining the key performance indicators that best demonstrate action in the key areas of “Our Pledge”. They believed that more stories about the industry, its people and how it works would give them greater insight into its operations and its values. This was considered the most effective way to communicate efforts to deliver on “Our Pledge” and prove its commitment to *positive social, economic and environmental performance*.

3.3.2 Expectations of proof that the industry is living “Our Pledge” reflects the areas of importance: environment, respecting animals and sustainability

A number of specific proof points were presented to the focus groups to determine the influence they might have on demonstrating to the Australian community that the Seafood

Industry is doing a good job and those that resonated reflected the key areas of importance:

- Caring for the environment
 - Total reductions in greenhouse gas emissions, waste and the use of finite resources by the industry like freshwater and materials (i.e. metals, wood etc.)
 - The change in the health in ecosystems that are directly impacted by fishing and aquaculture
 - The amount of time and effort the industry spends actively helping improve the environment they operate in (i.e. by collecting and recycling drift fishing nets etc.)
- Preventing animal cruelty and respecting animals
 - Trends in the numbers of fish, birds etc. that are accidentally caught and killed, released or discarded
 - How many operators are trained in and use techniques that actively reduce pain and suffering in animals
 - The number of operators that use techniques that actively reduce pain and suffering in animals at the point of harvest or capture
- Ensuring future stocks
 - Are there plenty of fish in the sea?
- Compliance with the law
 - How many operators and organisations are fined or penalised for breaking the law

For the quantitative study a full list was offered with respondents asked to choose up to 5 indicators that best demonstrate that the industry is living up to “Our Pledge”. They were asked of these 5, which is the most important (shown in dark green) with similar results to the qualitative research of proof points that relate to the environment, respecting animals and ensuring future stocks as well as a certification process that monitors sustainability practices. Interestingly, proof that the Seafood Industry is working with Marine Park Managers to support Marine Parks was considered the most important.

Q11. Of the following activities or measures, which would best demonstrate that the seafood industry is living up to this pledge? Showing %

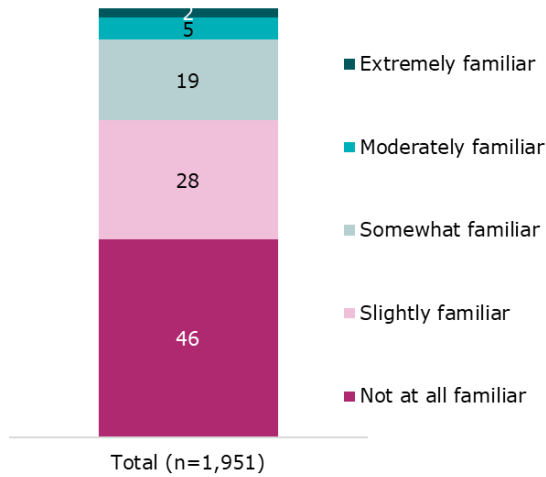


2019 SIA Survey, General population (n=1951)

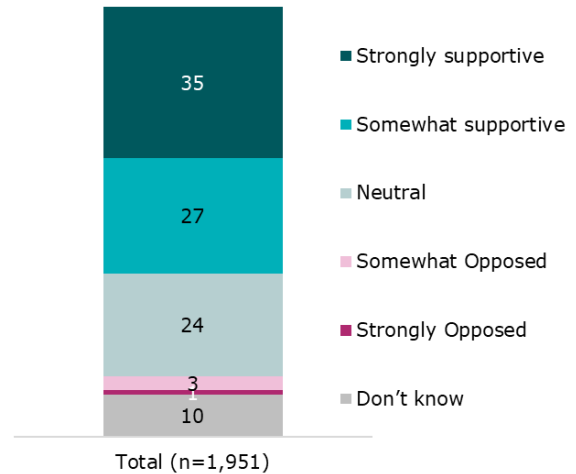
3.3.3 The role of Marine Parks is relatively unknown

Despite respondents choosing the work between the seafood industry and Marine Park Managers as important, there appears to be a lack of familiarity with the Australian Marine Parks and what they do with 46% saying they are not familiar at all and a further 28% saying they are slightly familiar. However, 62% are strongly supportive or supportive of Australian Marine Parks.

Q13. * How familiar, or not familiar, are you with the Australian Marine Parks? Showing %



Q14. Overall, how supportive or opposed are you of the Australian Marine Parks? Showing %



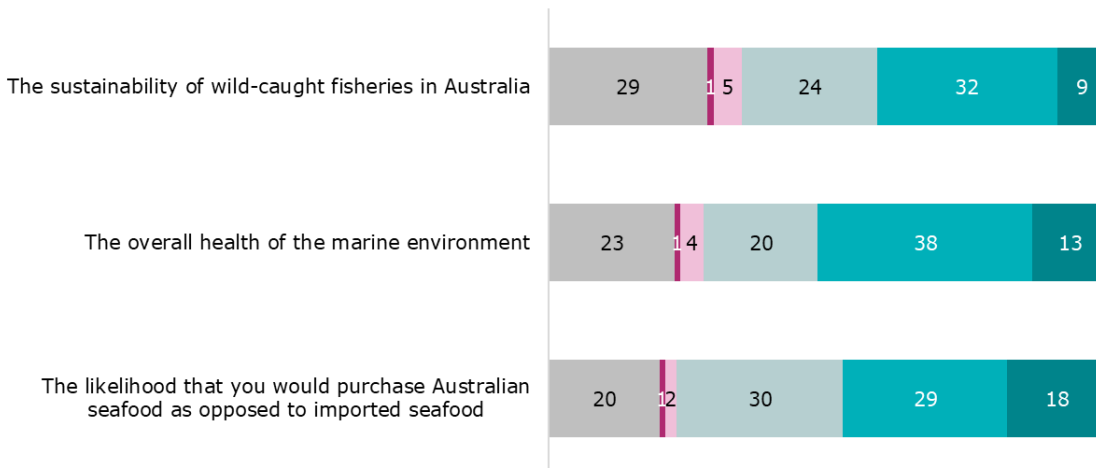
2019 SIA Survey, General population (n=1951)

*The Australian Government has created 58 Australian Marine Parks (formerly called the Commonwealth Marine Reserves) in waters more than 5.5 kms from Australian shores. How familiar, or not familiar, are you with the Australian Marine Parks?

There is a lack of understanding of the role or impact the Australian Marine Parks have had in Australia with 43% to 53% of Australians answering no change or don't know to the following.

Q15. Do you think the Australian Marine Parks have increased or decreased the following? Showing %

■ Don't know ■ Strongly decreased ■ Decreased ■ No change ■ Increased ■ Strongly increased



2019 SIA Survey, General population (n=1951)

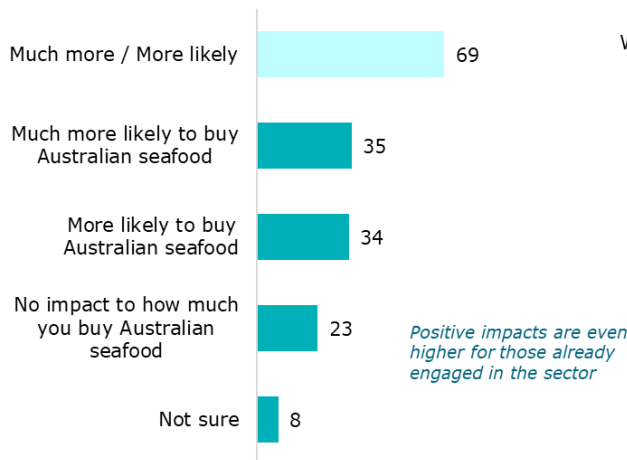
3.4 The impact of “Our Pledge”

3.4.1 “Our Pledge” has the potential to positively influence seafood buying behaviour

The research indicates that “Our Pledge” and committing to improve the Seafood Industry’s *positive social, economic and environmental performance* would have a positive impact on Australian’s seafood buying behaviour. Almost 70% of respondents said they would be more likely or much more likely to buy Australian seafood if they knew the Australian seafood industry was committed to this pledge. Further to this 56% indicated they would pay more or much more for Australian seafood.

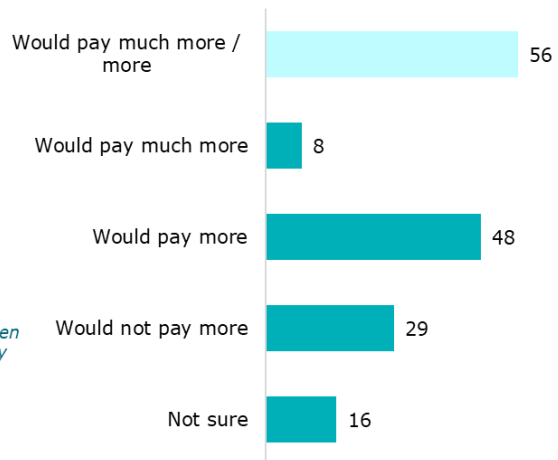
P3. If you knew the Australian seafood industry was committed to this pledge regarding the way it operates and its commitment to positive social, economic and environmental performance, what impact if any does it have on...? Showing %

Your likelihood to buy Australian seafood



Positive impacts are even higher for those already engaged in the sector

Your likelihood to buy Australian seafood



2019 SIA Survey, General population (n=1951)

4 Summary

4.1 Key findings

The combined qualitative and quantitative data provides valuable context about attitudes of the Australian community and sentiment towards the Australian seafood industry. In relation to other industries, the seafood industry is considered relatively responsible when it comes to doing the right thing and Australians perceive it to have a reasonably good reputation. However, there is little knowledge about how the seafood industry operates which contributes to a sense of uncertainty when it comes to the specifics of what it is doing in key areas of expected performance.

When asked to rate the seafood industry in terms of how it is performing in the most important areas of preventing animal cruelty, respecting animals, caring for the environment and ensuring future stocks, only just over a third of Australians perceive it to be doing a good or very good job. Further, on average 20% of Australians couldn't rate the seafood industry on these key indicators of performance as they "Didn't know" and on average 43% chose a neutral view. With a growing interest and awareness in our primary producers and how they operate, there is an opportunity to address this lack of knowledge of the industry and its commitment to positive social, economic and environmental performance.

"Our Pledge" has the potential to provide a strong and engaging message about the Australian seafood industry and the work it is doing as responsible and environmentally focused primary producers. The research showed an interest in connecting with the primary producers of the seafood industry, to hear stories about the people, their commitment to the environment, their care and respect for the animals they interact with and the journey they take to put the highest quality seafood on their tables.

4.2 Recommended language for "Our Pledge"

On the basis of the qualitative and quantitative research, we recommend the following language for "Our Pledge":

We are the Australian seafood industry and we are committed to putting the best Australian seafood on your table now and for generations to come.

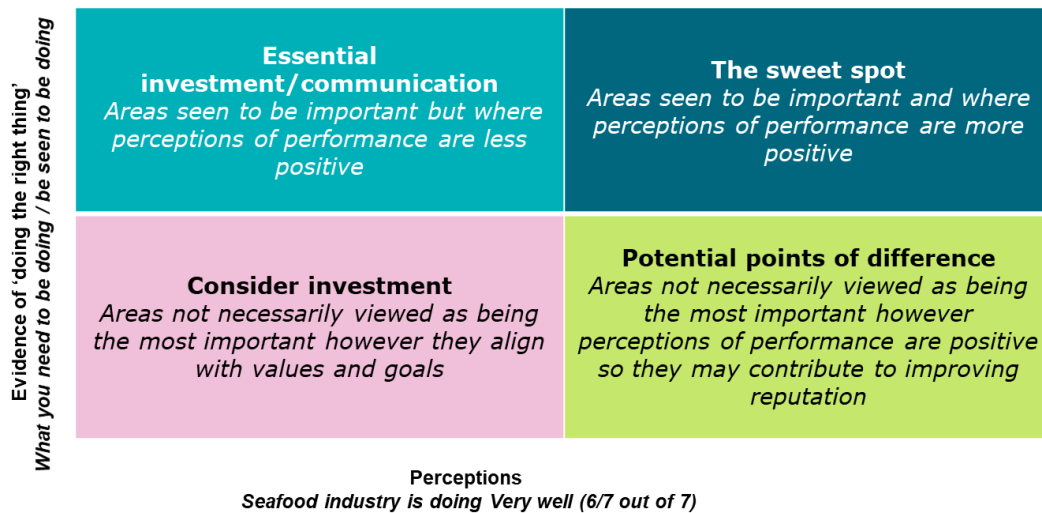
To ensure we do this in ways we are all proud of, we promise to:

- actively care for Australia's oceans and environment and work with others to do the same
- value our people, look after them and keep them safe
- respect the seafood we harvest and the wildlife we interact with
- be transparent in our practices and accountable for our actions
- actively engage with the community and listen to their concerns and
- continually improve our practices

This is our pledge to you.

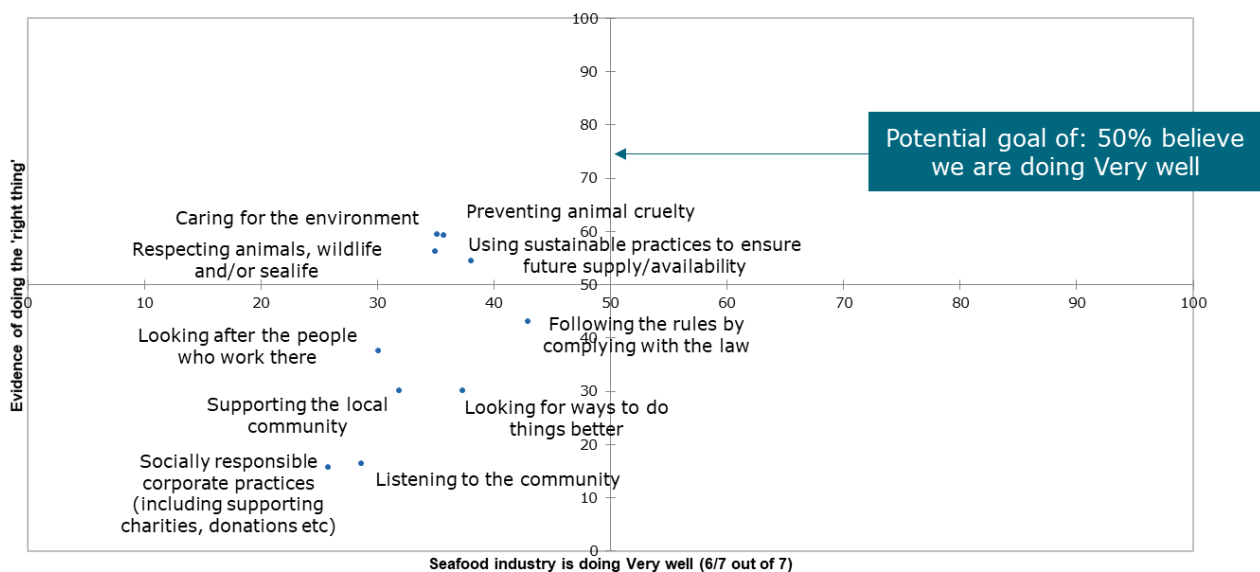
4.3 The opportunity to set targets based on the benchmark

While the quantitative study provides a benchmark for current community sentiment towards the seafood industry, the need for improvement depends largely on the agreed goals, objectives and targets. As outlined, the community has nominated the key areas that best demonstrate that the seafood industry is doing the right thing and they have also identified their perceptions of how well they are performing in these key areas. When we look at the opportunity to improve, we prioritise the areas considered most important as shown below:



The opportunity to improve however requires the seafood industry to choose the key areas that it considers important and its objectives or targets. These targets might be determined relative to the investment expected to be made to improve in those areas of greatest importance. For example, if we set a target of 50% of Australians believe we are doing well or very well, we have substantial room to improve perceptions across all key areas. *And this may be more about communication than actual practices given the general lack of knowledge about the sector...*

Scatter plot (Evidence of doing the 'right thing' vs Seafood industry is doing Very good/ Good (6/7 out of 7))



Appendix E – List of References

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