

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

essence.

Contents

1	Executive Summary	3
2	Introduction	5
3	Key findings	7
3.1	Awareness and understanding of ethical practice	7
3.1.1	There appears to be a good understanding of ethical practice and what this means	7
3.1.2	There is low awareness of the Australian Seafood Industry and how it operates	9
3.1.3	There are mixed perceptions of the seafood industry and its focus on ethical and sustainable practice.....	10
3.1.4	Those who know more about the seafood industry, who buy Australian seafood and who consume seafood regularly are more positive.....	13
3.2	“Our Pledge”	13
3.2.1	“Our Pledge” offers a good opportunity to further enhance the seafood industry	13
3.2.2	The commitment to doing better must be clear and concise	14
3.2.3	There are high expectations when it comes to caring for the environment	16
3.2.4	Participants agree that primary producers and workers should be looked after and their sense is that they are.....	17
3.2.5	Having regard for animal welfare is viewed positively	18
3.2.6	The opportunity is to promote transparency and accountability when it comes to complying with the law	19
3.2.7	Participants value a level of responsiveness to community concern about how the industry is behaving.....	20
3.2.8	Continuous improvement is viewed as being essential to identifying ways to do and be better	21
3.3	Proof points for delivering on “Our Pledge”	22
3.3.1	Stories about the industry, its people and how it works would be highly regarded	22
3.3.2	Expectations of proof that the industry is living “Our Pledge” reflects the areas of importance: environment, respecting animals and sustainability.....	22
3.3.3	The role of Marine Parks is relatively unknown	25
3.4	The impact of “Our Pledge”	26
3.4.1	“Our Pledge” has the potential to positively influence seafood buying behaviour.....	26
4	Summary.....	27
4.1	Key findings	27
4.2	Recommended language for “Our Pledge”	27
4.3	The opportunity to set targets based on the benchmark.....	28

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

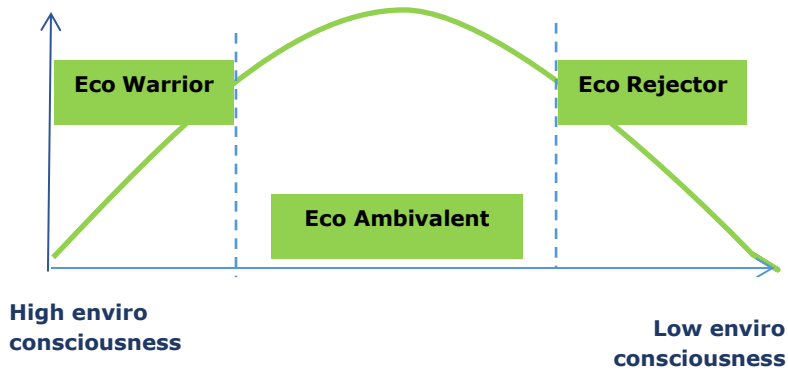
- benchmark attitudes and perceptions of the seafood industry
- confirm the language of “Our Pledge” that most resonates
- rank the perceived importance of the action to be taken that will best deliver on “Our Pledge”
- understand the influence of “Our Pledge” on consumer behaviour
- establish awareness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

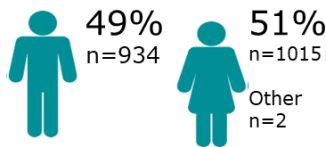


The specification included:

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."

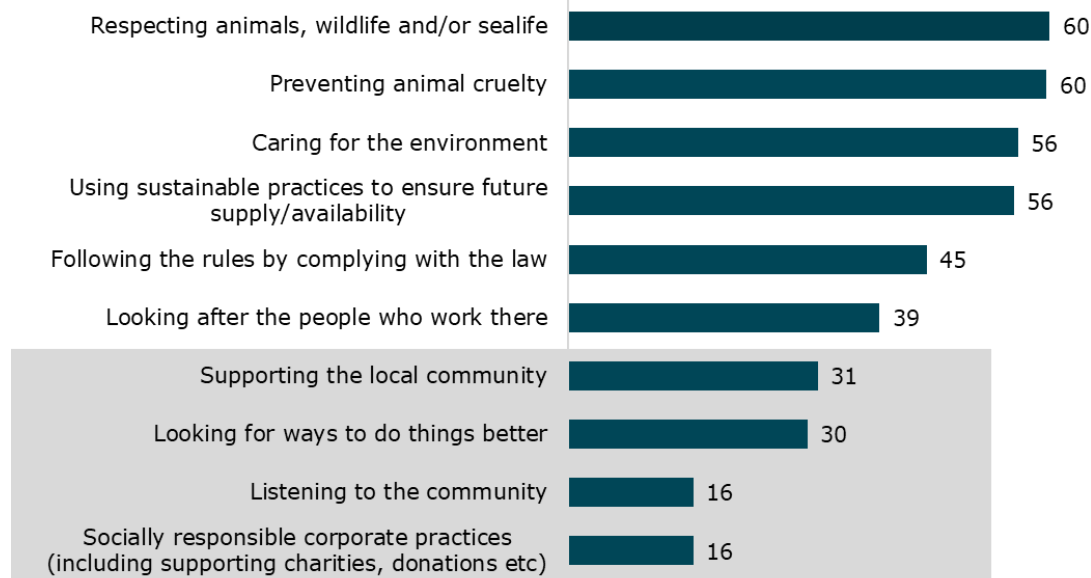
Some participants suggested that there is an increased cost in doing the right thing – that it costs more to be ethical and to operate in a way that reflects good practice and a positive contribution to the environment and the community. They believe this cost is passed onto the consumer potentially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

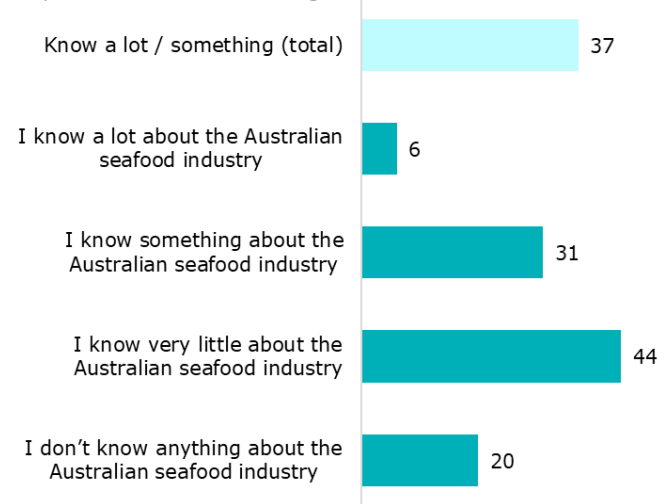


2019 SIA Survey, General population (n=1951)

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 %

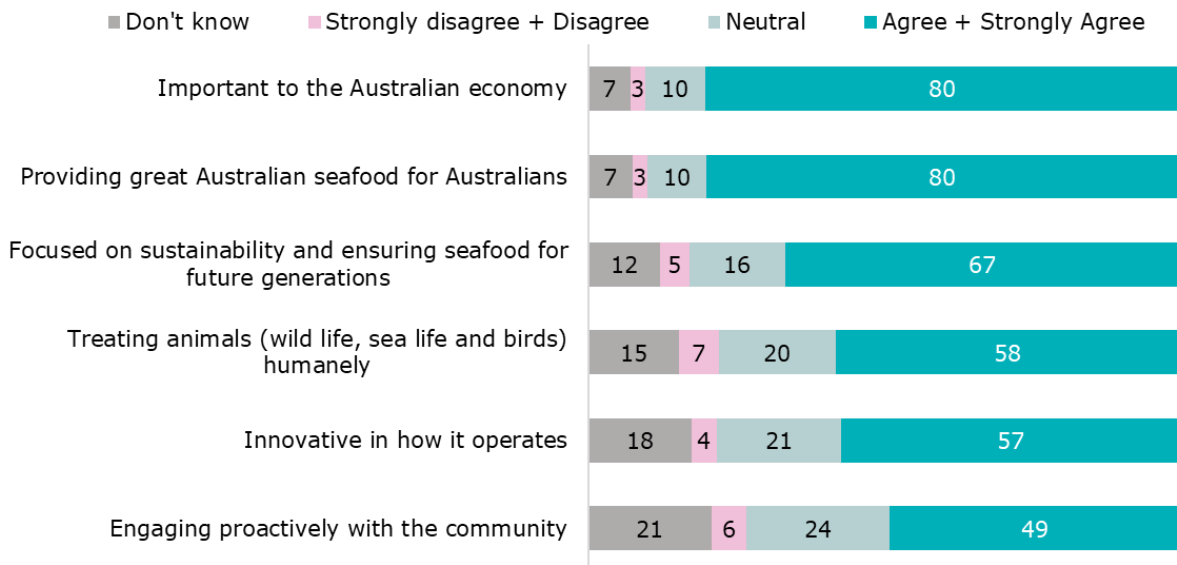


2019 SIA Survey, General population (n=1951)

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

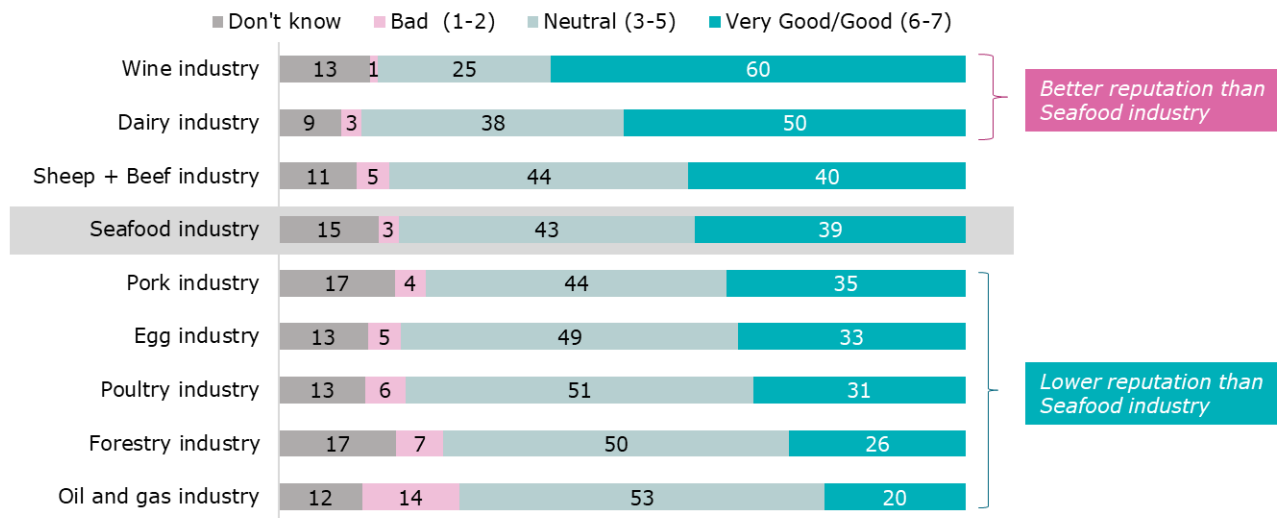
There are mixed views on which ways of fishing are "better", are more sustainable and produce higher quality products with the more engaged participants suggesting that ethical practices of wild catch fishing such as pole and line and monitoring stocks ensures sustainable fishing and quality fish and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

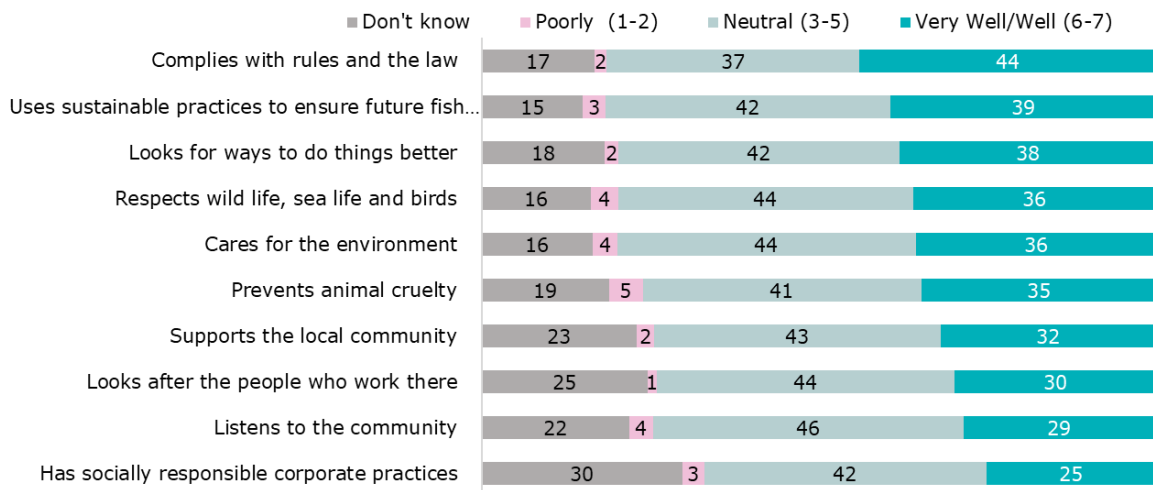
Q2. How would you rate the overall reputation of each of the following industries in Australia Showing %



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).

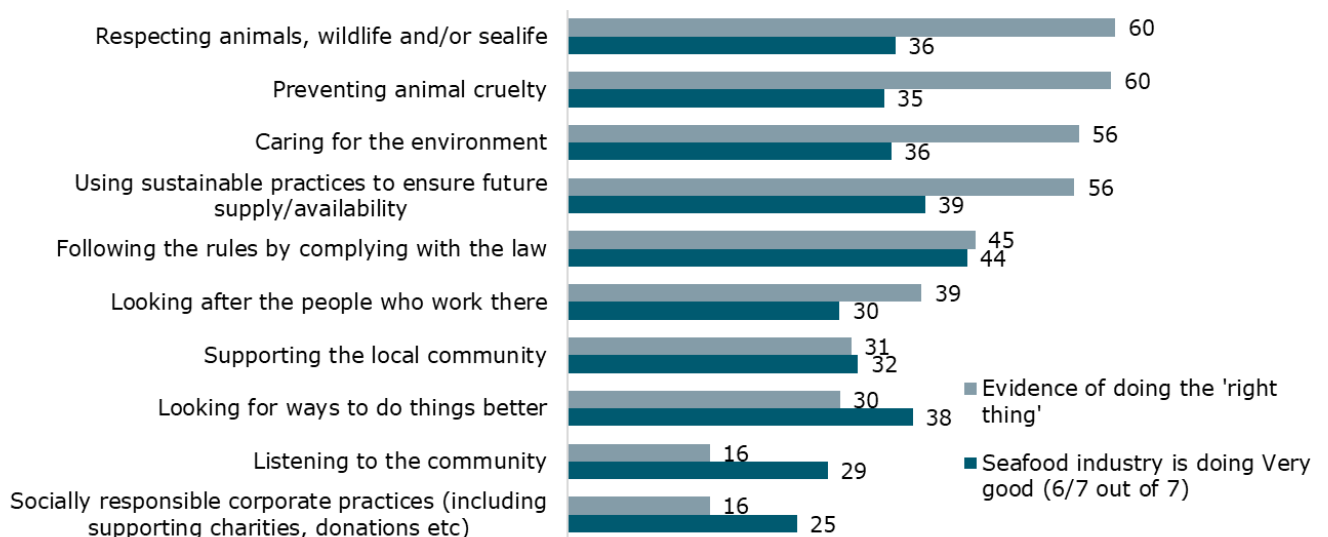
Q7. How would you rate the seafood industry in terms of how well it does the following?
Showing %



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.

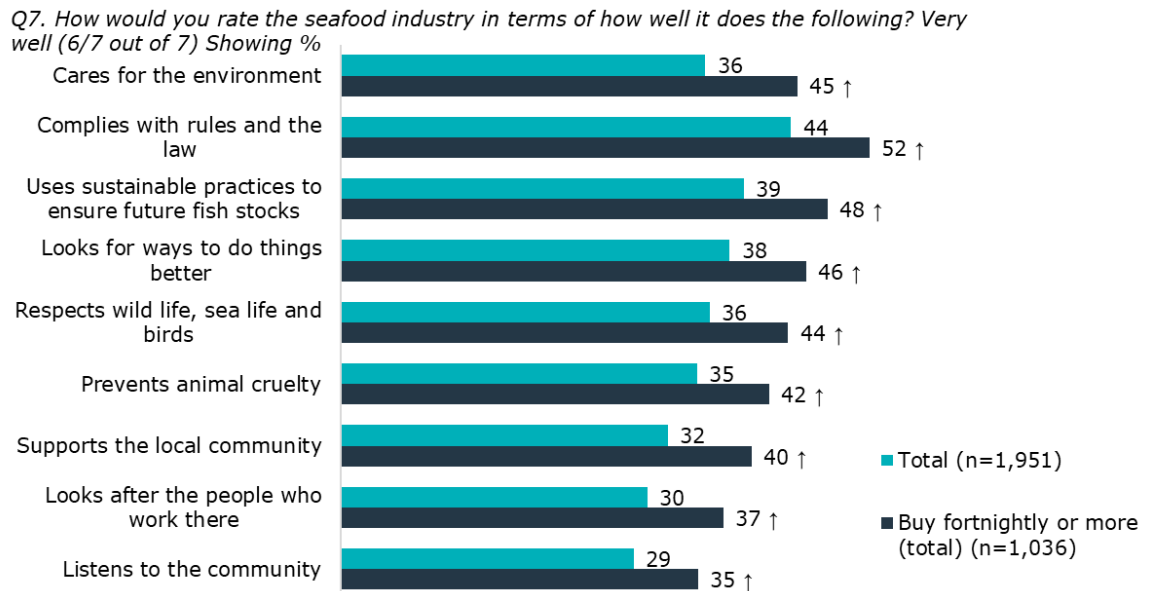
Q3. When it comes to an industry, organisation or employer working in the area of primary produce or farming, what does it mean to be doing the "right thing"?
Q7. How would you rate the seafood industry in terms of how well it does the following? Very good (6/7 out of 7)
Showing %



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."

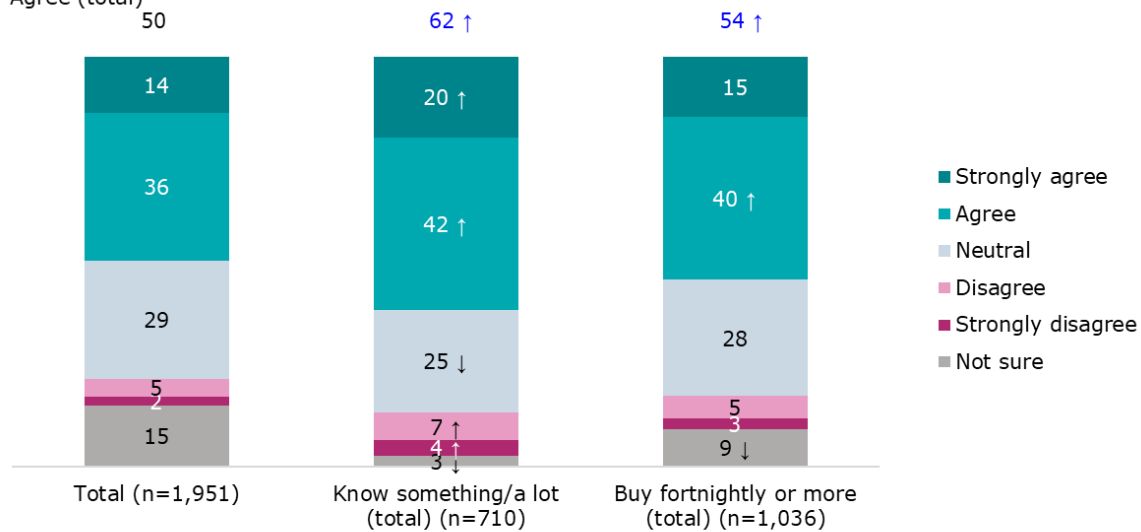
They believed that the concept of a pledge to do better is appealing however question its enforcement or proof that it's being delivered.

"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 %

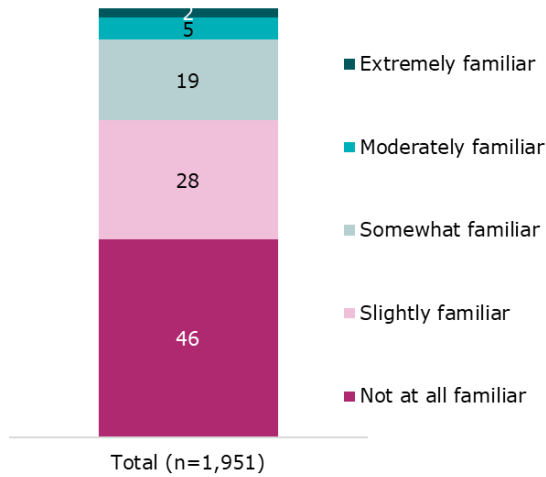


2019 SIA Survey, General population (n=1951)

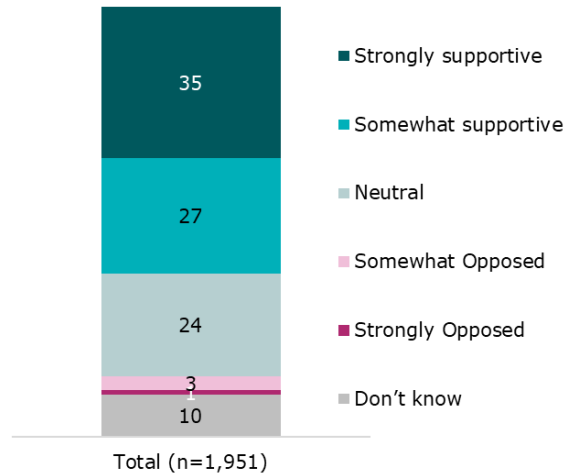
3.3.3 The role of Marine Parks is relatively unknown

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 %



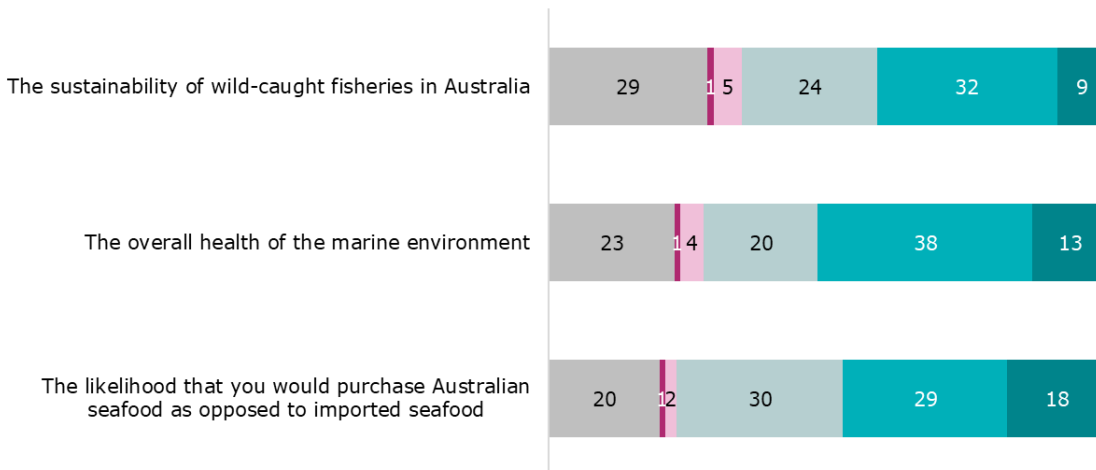
2019 SIA Survey, General population (n=1951)

*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)

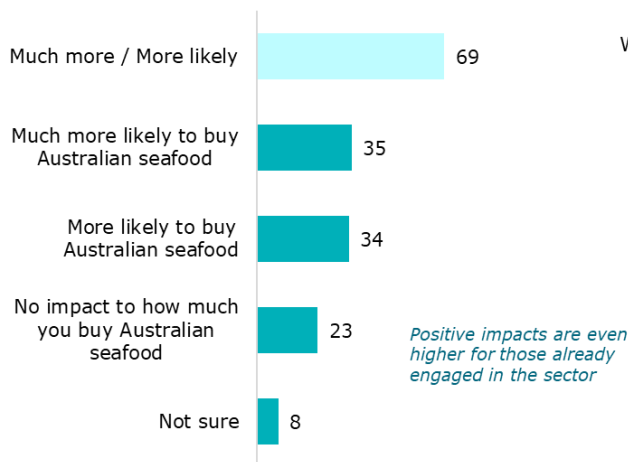
3.4 The impact of “Our Pledge”

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

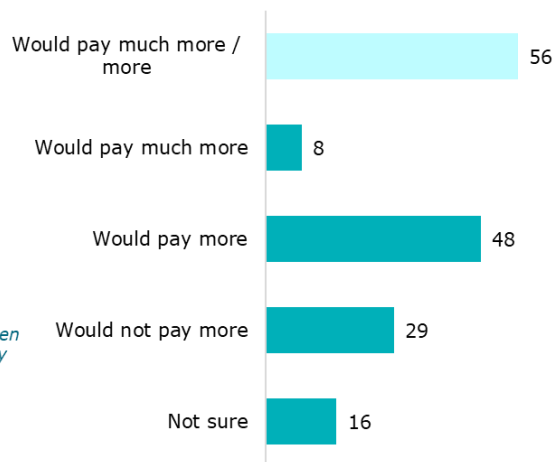
The research indicates that “Our Pledge” and committing to improve the Seafood Industry’s *positive social, economic and environmental performance* would have a positive impact on Australian’s seafood buying behaviour. Almost 70% of respondents said they would be more likely or much more likely to buy 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



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.

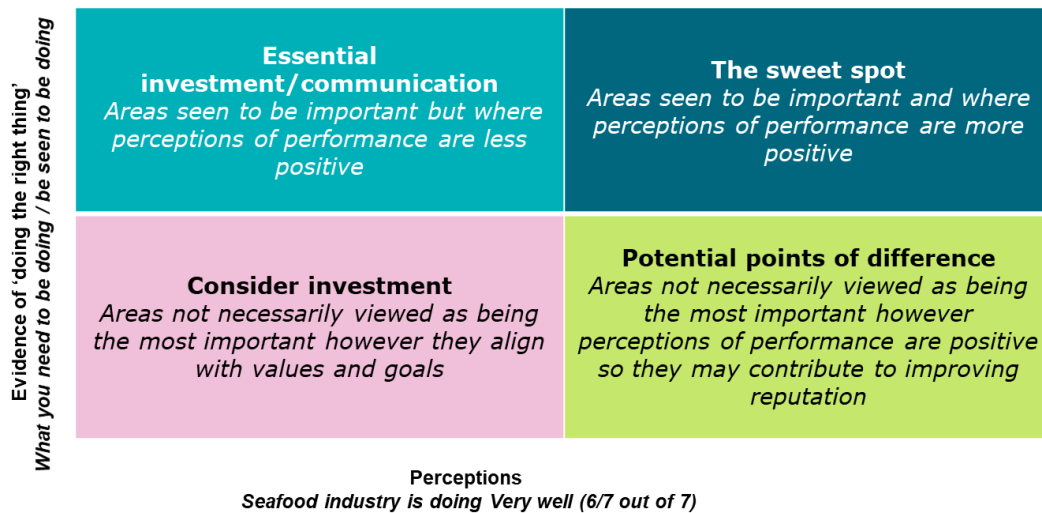
To ensure we do this in ways we are all proud of, we promise to:

- 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))

