Food Alliance WA Consumer Perceptions Survey

October 2019

CANNINGS PURPLE
Strategic Communications

metrix

Scope of Engagement

metrix

Project Objectives

The purpose of this research was to better understand the **perceptions, attitudes and levels of trust towards the WA food, farming and fishing industries** amongst a representative sample of the general population from greater Perth.

Research Objectives

- Understand how 'informed' and 'connected' consumers feel about the food, farming and fishing industries.
- Identify the factors that drive a positive or negative impression of the food, farming and fishing industries.
- Understand consumer buying behaviour across food, farming and fishing industries.
- Identify opportunities for food, farming and fishing industries to strengthen overall perceptions among Western Australians.

Methodology

Metrix undertook an 8 minute online survey of the greater Perth population, quantifying consumer perceptions, attitudes and levels of trust towards the WA food, farming and fishing industries. All respondents were emailed an invitation to participate in the survey, resulting in a sample of **n=1,021**.

Data was collected between September 13th and 19th 2019.

The final sample composition is detailed below, with more detail provided in the appendix.

Demographics	Sample Size (n)	Proportion of Sample (%)
Male	505	49%
Female	516	51%
Under 35 years	301	29%
35-44 years	189	19%
45-54 years	164	16%
55 years or older	367	36%
Total	1,021	100%

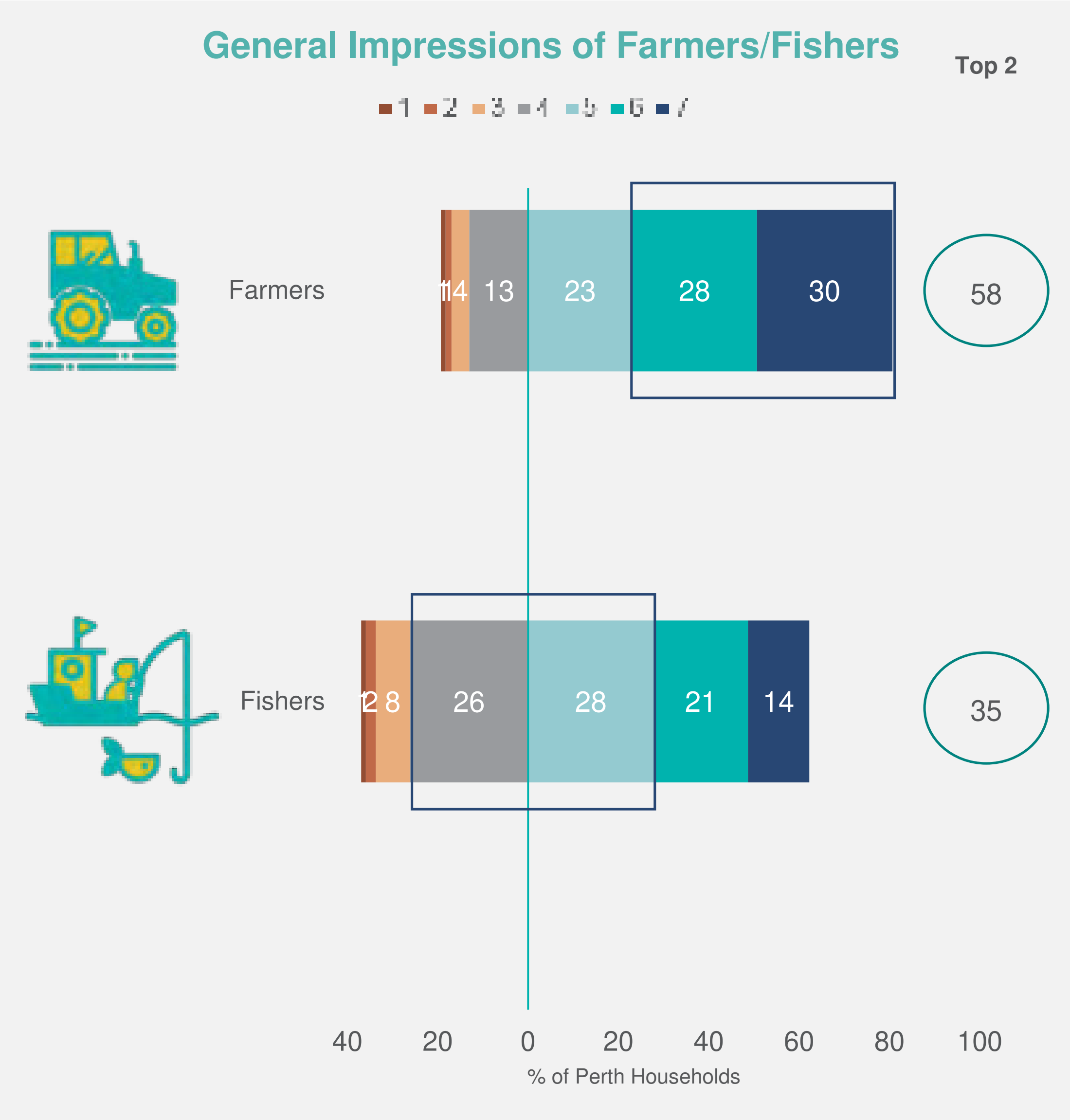
Location*	Sample Size (n)	Proportion of Sample (%)
Joondalup/Alkimos	172	17%
Western Suburbs	58	6%
Fremantle	37	4%
Bayswater/Bassendean	92	9%
Canning	95	9%
Other Perth Metro	567	56%
Total	1,021	100%

*Quota targets were set for specific suburbs of interest, reaching a minimum sample of n=50. These locations were 'over sampled' in order to achieve enough numbers to look at these locations individually. In order to make sure over sampling did not bias the total numbers, weighting was applied to ensure the overall sample was geographically represented. However, there were no significant differences when reporting on each location separately.

Perceptions surrounding WA food, farming and fishing

Impressions of farmers are more positive than fishers.

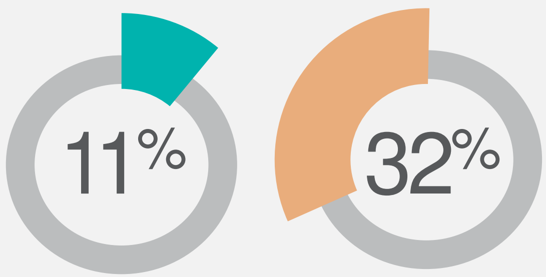
Those aged 55 and over have a more positive impression of farmers, with 68% rating 6 or 7.



Base n=1,021
Q4a. How would you rate your general impression of farmers in Western Australia?
Q4b. How would you rate your general impression of fishers in Western Australia?

Though perceptions are high, people do not feel connected or informed of the food, farming and fishing industries in WA.

Feel connected to the WA food, farming and fishing industry

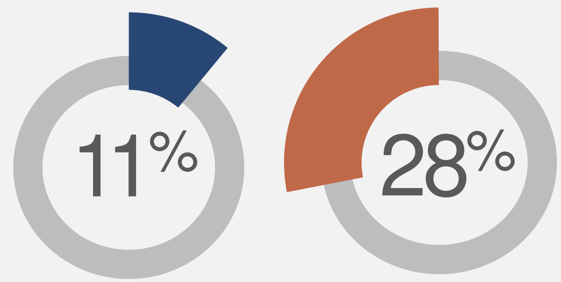


Top 2 (Strongly connected)

Bottom 2 (Not connected)

% of Perth Households

Feel informed about the WA food, farming and fishing industry



Top 2 (Very informed)

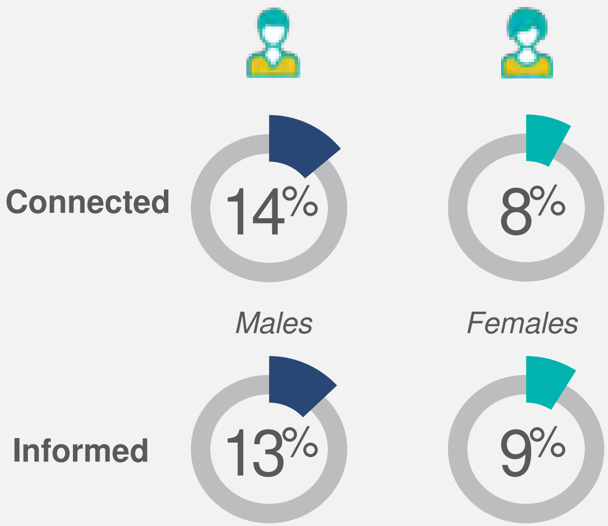
Bottom 2 (Not informed)

% of Perth Households

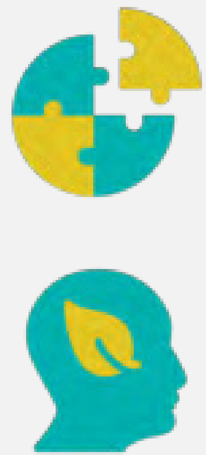
Base n=1,021
Q1. Thinking about the Western Australian food, farming and fishing industries, to what extent do you feel you are connected to these industries?
Q4. On a scale of 1-7, how informed would you say you are about the food, farming and/or fishing industries in Western Australia?
NOTE: Top 2 (6+7), Bottom 2 (1+2)

However, a minority of demographics feel more connected and informed than others.

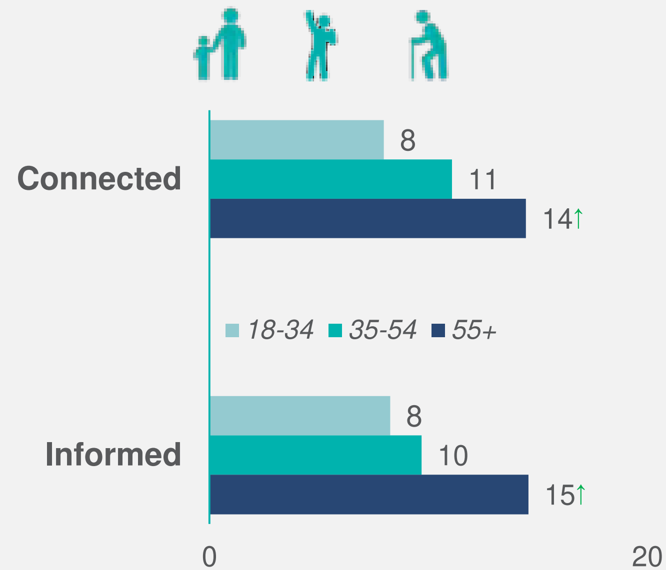
Males tend to feel more connected to and more informed of WA farming and fishing than females.



% of Perth Households
Strongly Connected (Top 2)



The younger demographic feels less connected to and less informed of WA farming and fishing than older households in Perth.



% of Perth Households
Very Informed (Top 2)

Base n=1,021 | Males n=505, Females n=516 | 18-34 n=301, 35-54 n=353, 55+ n=367
Q1. Thinking about the Western Australian food, farming and fishing industries, to what extent do you feel you are connected to these industries?
Q4. On a scale of 1-7, how informed would you say you are about the food, farming and/or fishing industries in Western Australia?
NOTE Top 2 (NET 6+7), Bottom 2 (NET 1+2)
↑↓ Significant difference at 95% confidence between segments

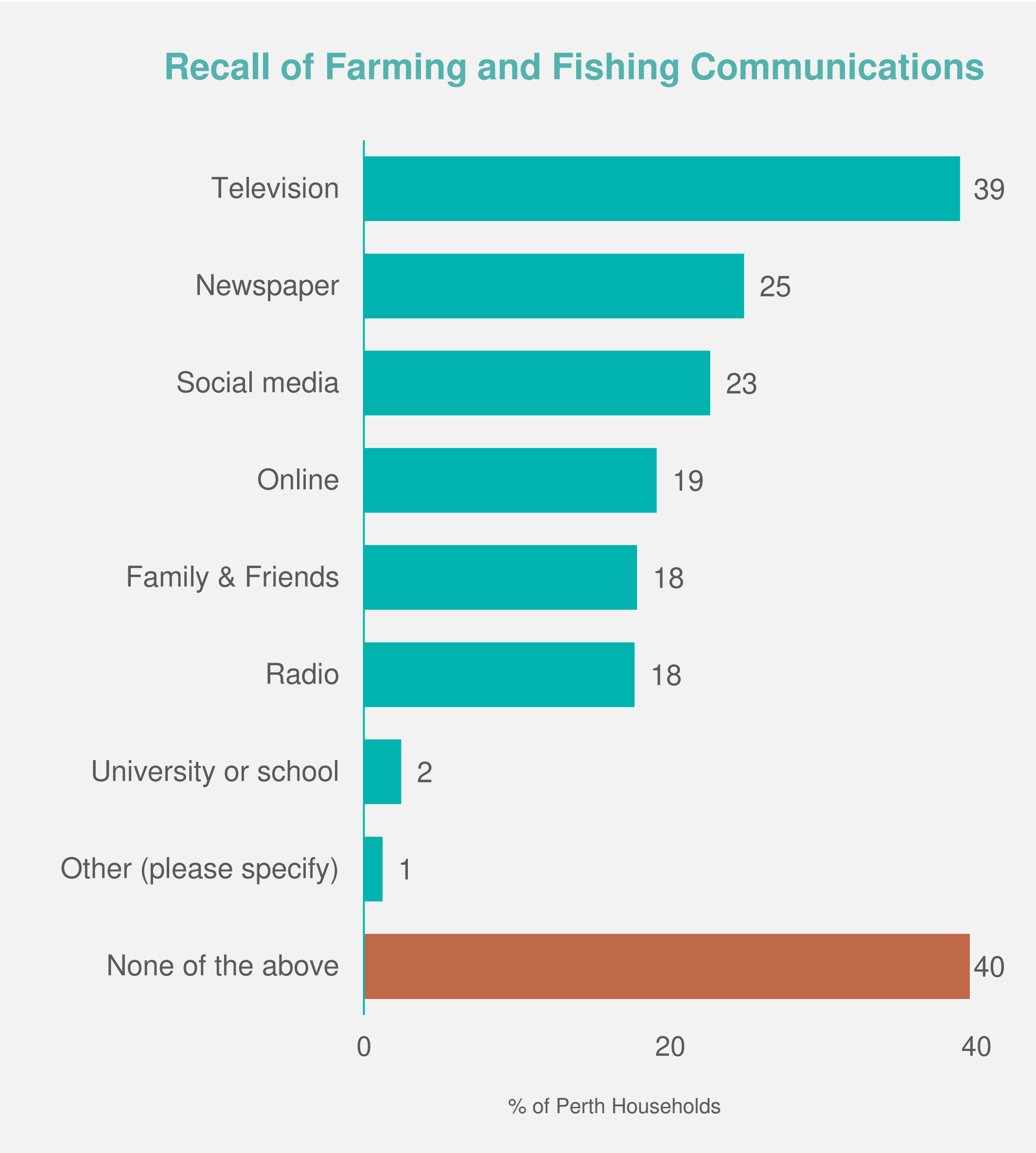
Almost half of the community indicated they would like to understand more about the food, farming and fishing industries in WA.

Furthermore, the majority of Perth households support more educational opportunities for the next generation.

Education and Information on WA Farming and Fishing (Top 2 ratings)

Base n=1,021
Q4. On a scale of 1-7, how informed would you say you are about the food, farming and/or fishing industries in Western Australia?
Q10.10. To what extent do you agree or disagree with the following statements: I believe students should have an opportunity to learn about food, farming and fishing and the careers these industries offer.
Q9.5. To what extent do you agree or disagree with the following statements I would like to understand more about the food, farming and fishing industry in WA
NOTE Top 2 (NET 6+7), Bottom 2 (NET 1+2)

Television has the strongest recall, though a large portion don't remember any communications.



Overall n=1,021
Q11. Have you seen or heard anything about fishing and farming in the past 3 months in any of the following places?

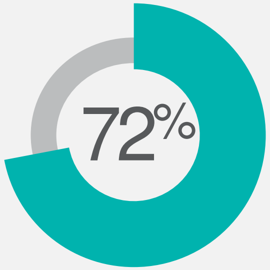
People more connected to and informed of the WA farming and fishing industry have higher perceptions overall.

Pride and trust in WA farmers and fishers is high.

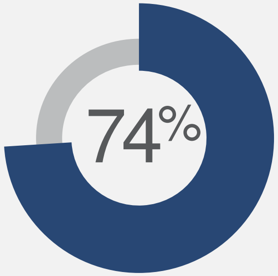
However, trust in WA fishers is slightly lower than in farmers, likely due to less knowledge of the fishing industry over the farming industry.

Perceptions Surrounding WA Farmers and Fishers (Top 2 Agreement Ratings)

I am proud of the quality of the food we produce in WA



I trust WA farmers to produce the food I eat

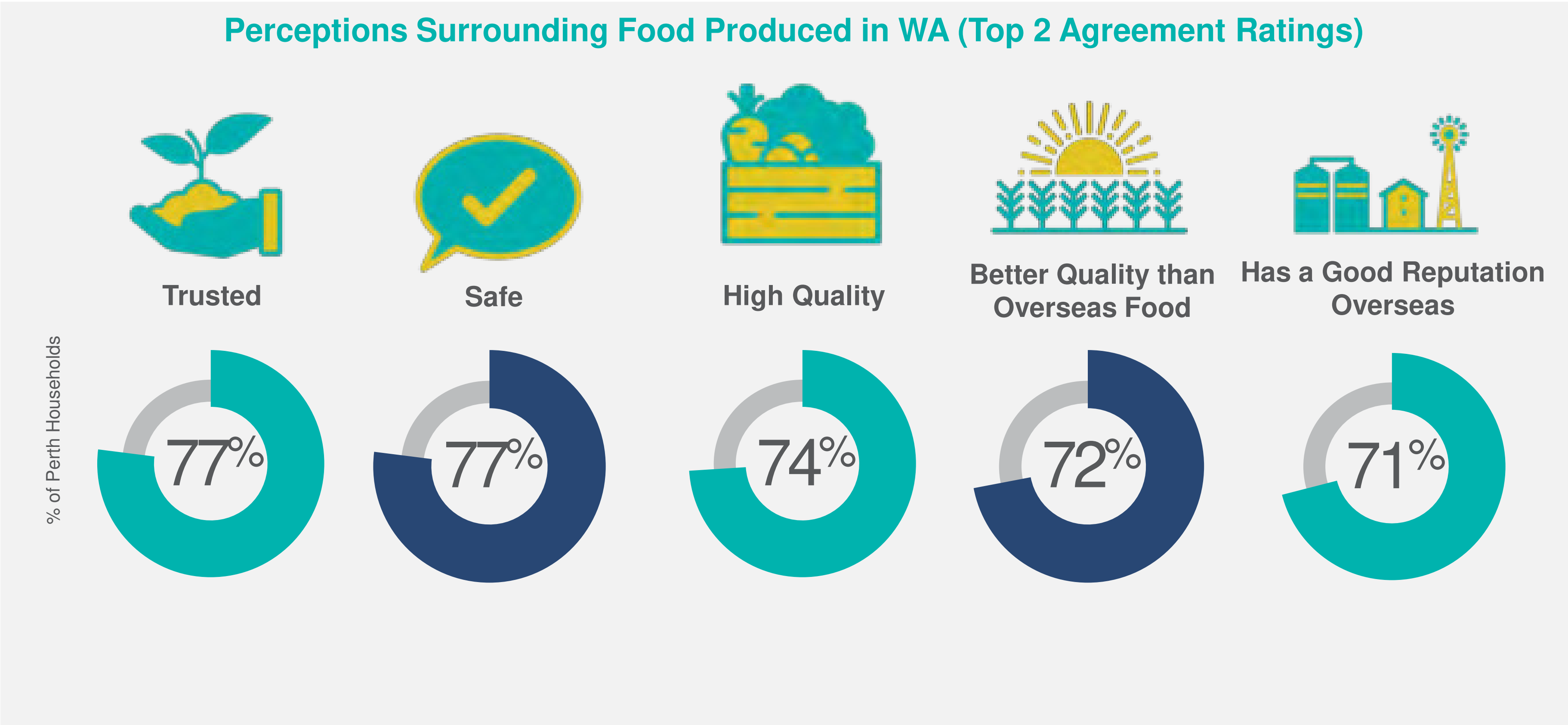


I trust WA fishers to produce the food I eat

% of Perth Households

Base n=1,021
Q10. To what extent do you agree or disagree with the following statements?
NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)

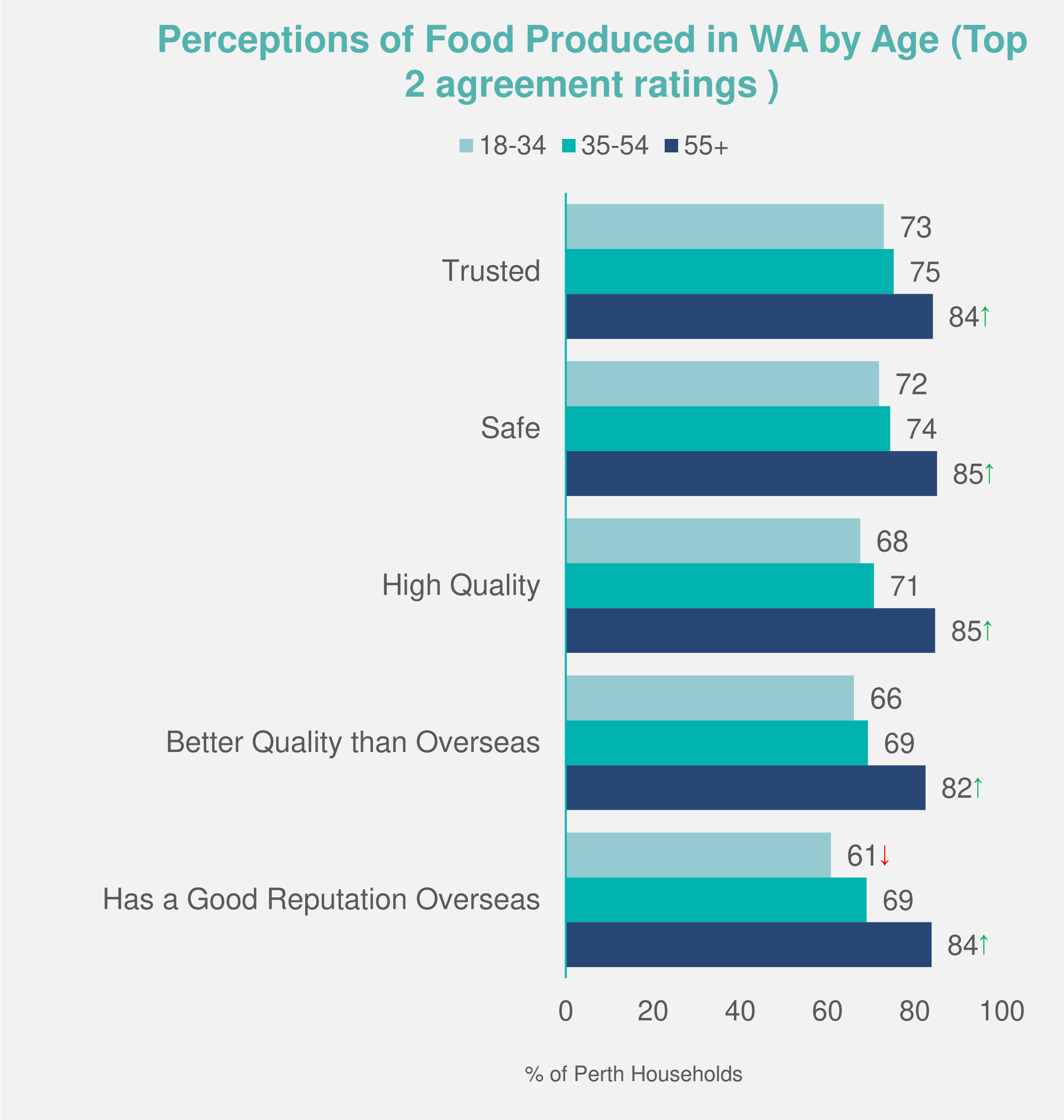
The food produced by WA farmers and fishers is also highly trusted and safe.



Base n=1,021
Q5. How would you rate the food produced by Western Australian farmers and fishers?
NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)

Those aged 55 and older have significantly higher perceptions of food produced in WA.

Furthermore, 18-34 year-olds have a much lower perception of the overseas reputation of food produced by farmers and fishers in WA compared to other age groups.

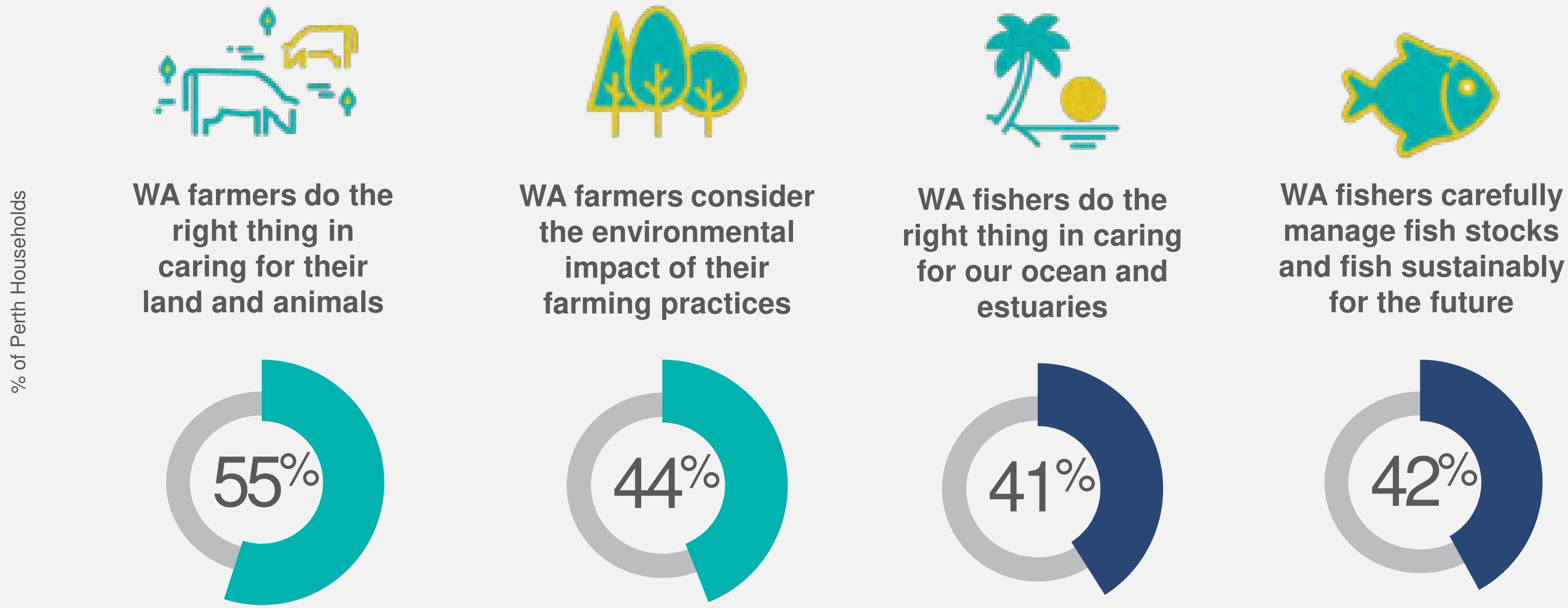


Overall n=1021 | 18-34 n=301, 35-54 n=353, 55+ n=367
Q5. How would you rate the food produced by Western Australian farmers and fishers?
NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)
↑↓ Significant difference at 95% confidence between segments

People don't know much about environmental sustainability and ethical animal practices of WA farmers and fishers.

This does not necessarily translate to negative sentiment, with only 6-12% of Perth Households rating these below 3 out of 7. Rather, people are rating these middlingly, indicating they are not entirely sure on their agreement one way or another.

Perceptions Surrounding Food Produced in WA (Top 2 Agreement Ratings)

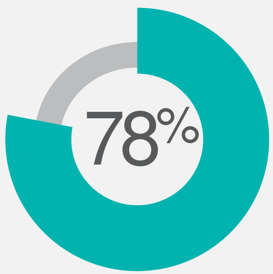


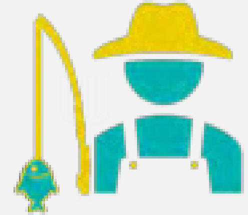
Base n=1,021
Q10. To what extent do you agree or disagree with the following statements?
NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)

Farming families are seen as fundamental to the WA economy and regional community base; however, there is less agreement with that of fishing families.

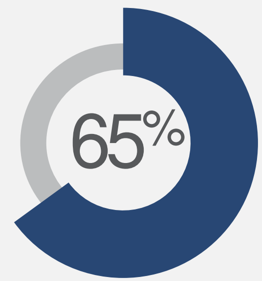
Perceptions Surrounding WA Farming and Fishing Industries (Top 2 Agreement Ratings)

Farming families are an important part of regional communities and the economy in Western Australia





Fishing families are an important part of regional communities and the economy in Western Australia



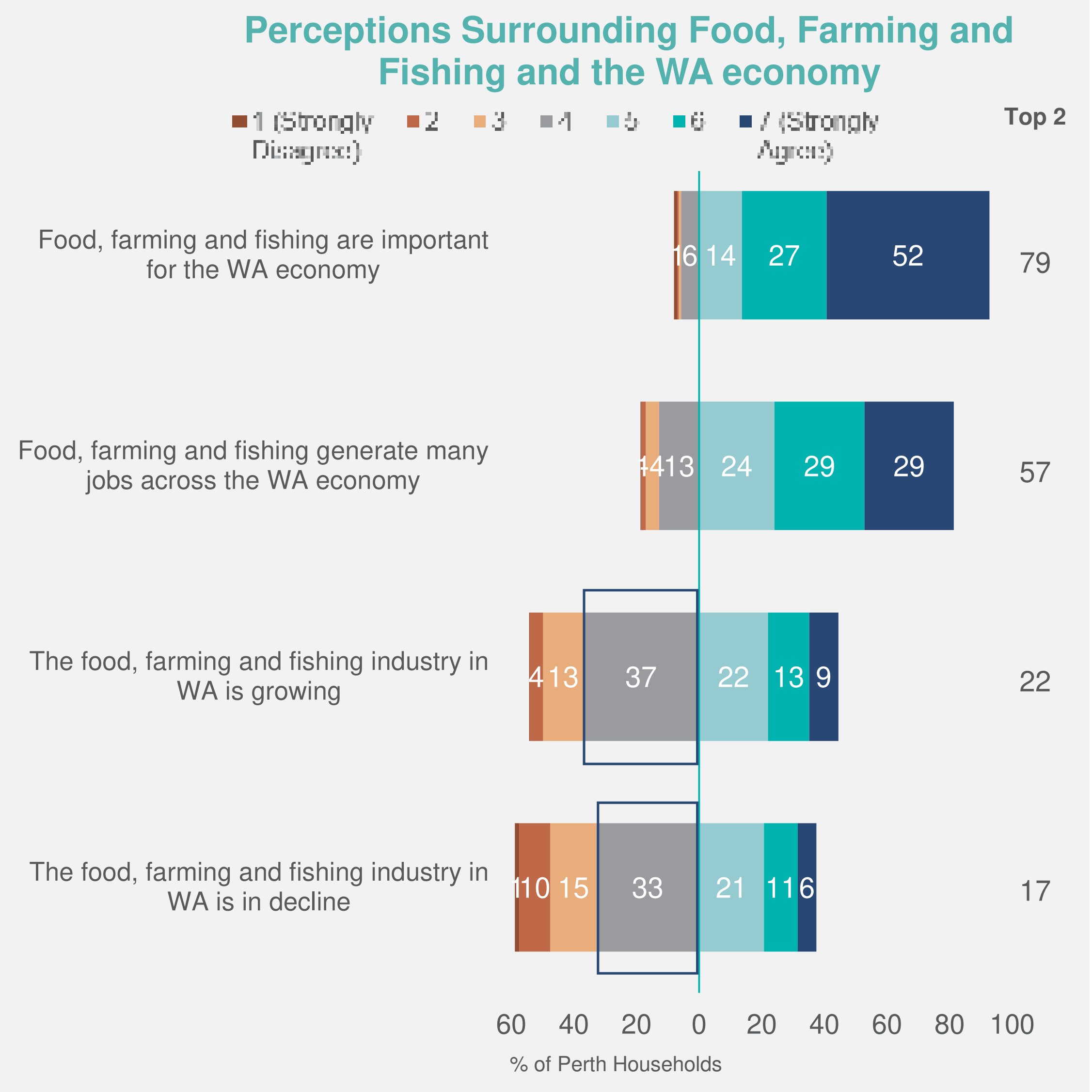
% of Perth Households

Base n=1,021
Q10. To what extent do you agree or disagree with the following statements?
NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)

Whilst many recognise the industry's economic importance, there is no clear consensus on its future performance.

Those aged 55 and over tend to see the industry as more important to the WA economy, with nine in ten rating this a top 2 score.

However, this does not translate to a difference towards future performance, with similar scores across all ages.



Base n=1,021
Q9. To what extent do you agree or disagree with the following statements?

While sentiment is high, there is some uncertainty surrounding the practical side of farming and fishing in WA.

Most consumers have good intentions when purchasing food.

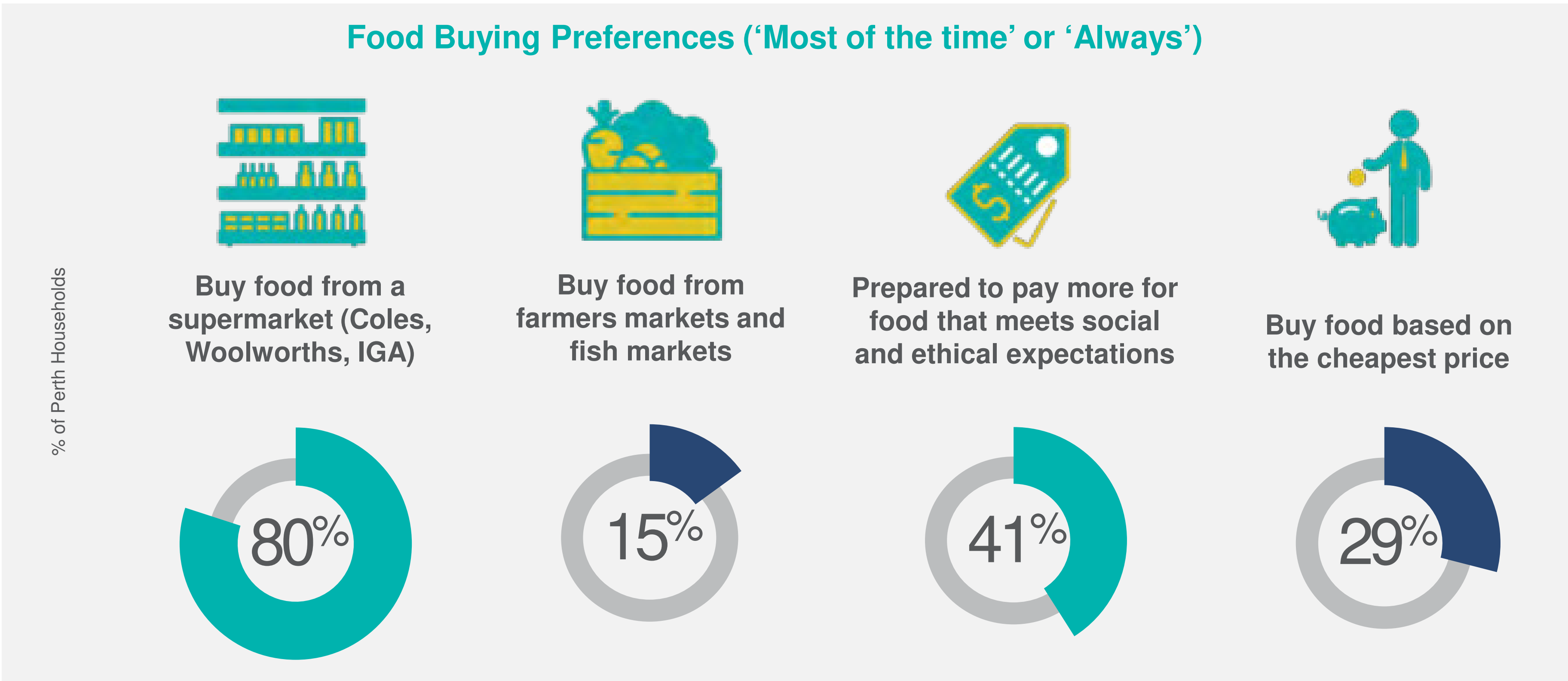
Very few stating they do these ‘never’ to ‘occasionally’.

Food Buying Preferences (‘Most of the time’ or ‘Always’)

Base n=1,021
Q6. For each of the following statements, please choose the response which most closely matches what you do:

Furthermore, two in five are prepared to pay more for food that meets social and ethical expectations.

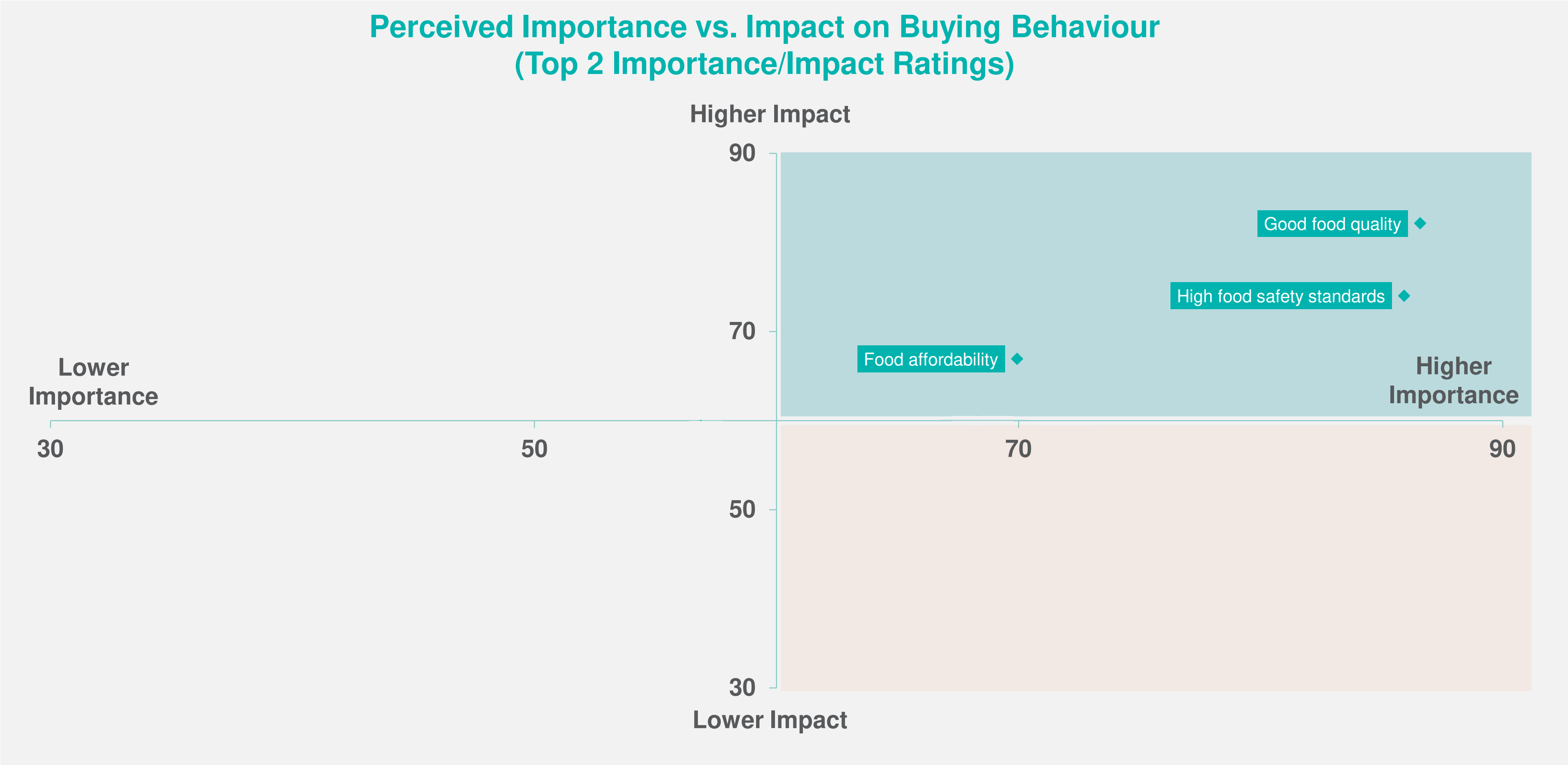
In reality, reality bites and the price and convenience of readily available supermarket food is key.



Base n=1,021

Q6. For each of the following statements, please choose the response which most closely matches what you do:

In practice, food quality and safety standards are paramount in consumer's buying behaviour.

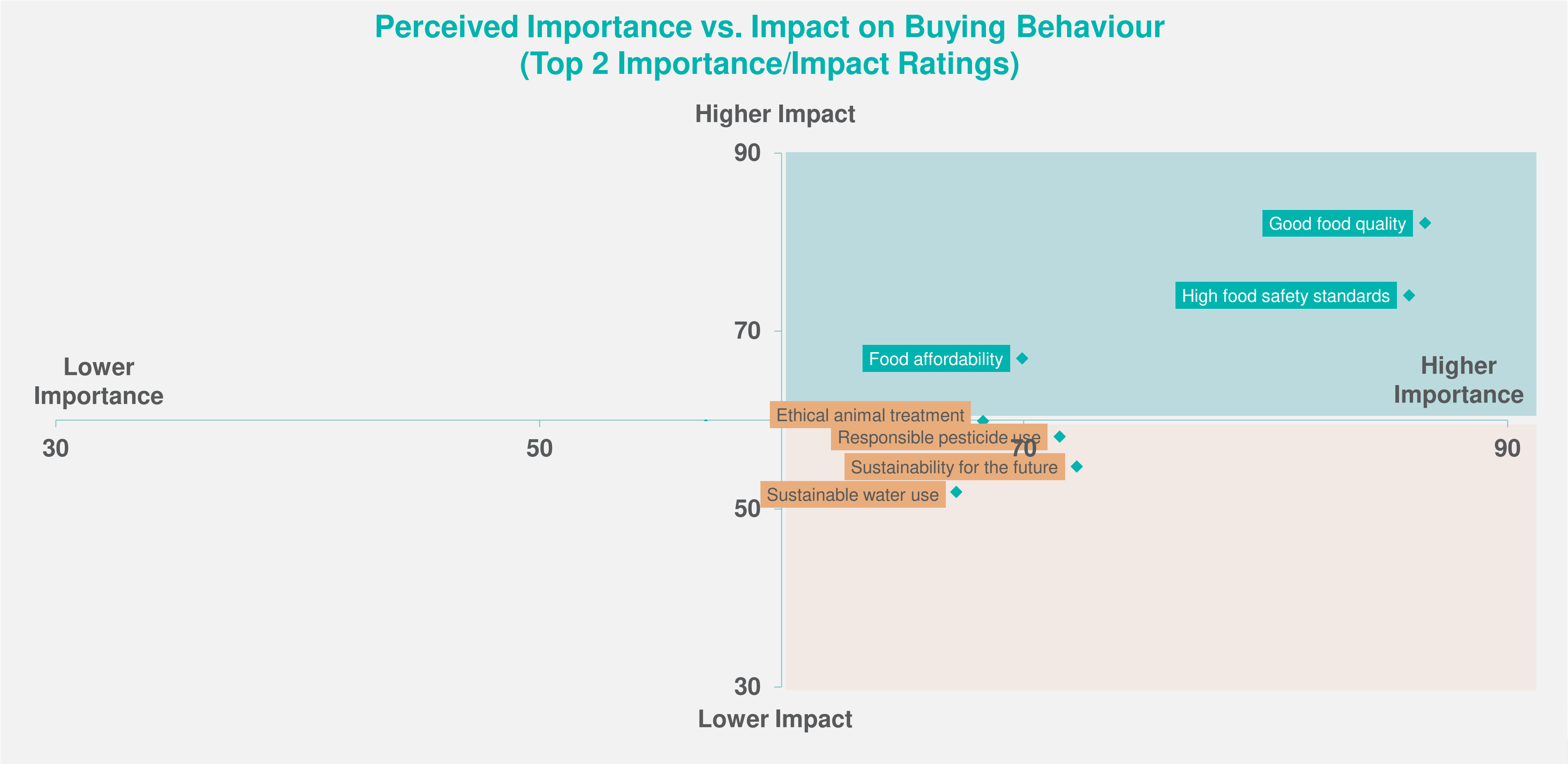


Base n=1,021

Q7. When thinking about food, farming and fishing, please indicate how **important** the following are to you personally:

Q8. When thinking about food, farming and fishing, please indicate the **level of impact** each of the following has on your decisions when you are buying food

While sentiment around ethical animal treatment, sustainability and responsibility are there, this does not translate to buying behaviour.



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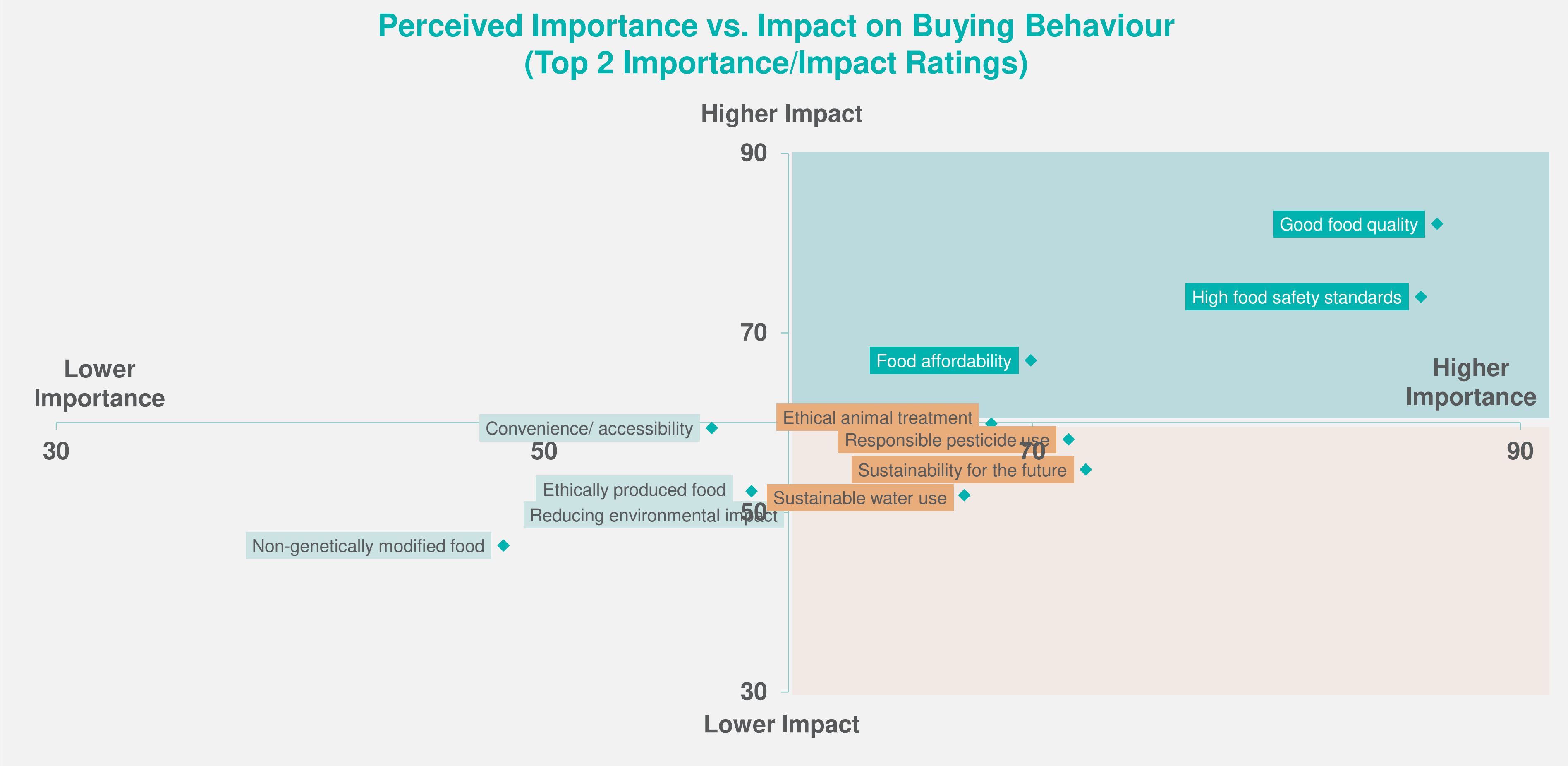
Convenience and accessibility does not have a comparatively high impact on buying behaviour.

GMO foods also generally don't play into people's decision making processes on a day to day basis.



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Consumer sentiment suggests a preference towards buying local with quality and safety standards in mind, though supermarkets provide a natural default for price and affordability.

Social Licence

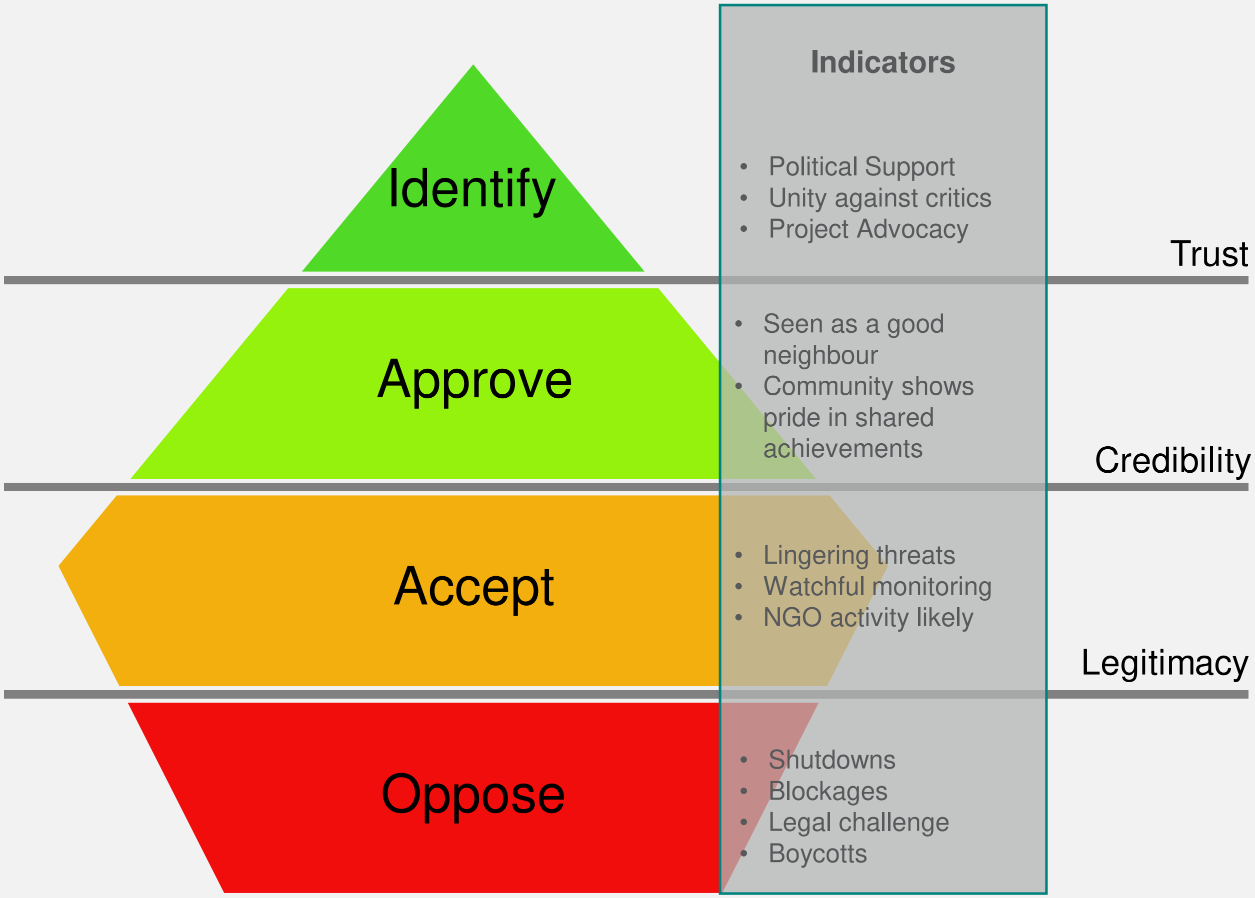
Social Licence to Operate can exist at different levels as shown in this diagram, developed by Robert Boutilier. Within each community there will be a spectrum of views represented.

Those who oppose a project or company are unlikely to change their minds in the short to medium term, and tend to be vocal in their opposition.

In the absence of alternative messages, there is a risk that people who accept or approve move towards an oppose position.

The goal of a social licence strategy is to ensure that those who accept or approve of the company and its purpose regularly hear simple, rational and factual messages which show that the company and its purpose are aligned with their interests and beliefs.

Over time this should increase the number of people who "approve" of the company and its purpose, and help support the company's Social Licence to Operate, as well as its brand and reputation.



Potential Indicators

Identify

11% strong connection

Top 2 | 6 + 7 | Agree + Strongly Agree

Q1. Thinking about the Western Australian food, farming and fishing industries to what extent do you feel connected to these industries?

Trust

Approve

79% important for the WA economy

Top 2 | 6 + 7 | Agree + Strongly Agree

Q9. To what extent do you agree or disagree with the following statements: ‘Food farming and fishing are important for the WA economy’.

72% proud of the quality food produced in WA

Top 2 | 6 + 7 | Agree + Strongly Agree

Q10. To what extent do you agree or disagree with the following statements: ‘I am proud of the quality of food we produce in Western Australia.’

Credibility

Accept

58% positive impression of farmers

Top 2 | 6 + 7 | Positive + Very Positive

Q4a. How would you rate your general impressions of farmers in Western Australia?

35% positive impression of fishers

Top 2 | 6 + 7 | Positive + Very Positive

Q4a. How would you rate your general impressions of fishers in Western Australia?

Legitimacy

Oppose

4% do not trust the food produced in WA

Bottom 2 | 1 + 2 |

Q5. How would you rate the food produced by Western Australian farmers and fishers?
‘I do not trust the food produced in Western Australia.’

These figures are <u>indicative</u> of where consumer perceptions currently sit within the Social Licence structure.

Potential Indicators

Identify

11% strong connection
Top 2 | 6 + 7 | Agree + Strongly Agree
Q1. Thinking about the Western Australian food, farming and fishing industries to what extent do you feel connected to these industries?

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35% positive impression of fishers
Top 2 | 6 + 7 | Positive + Very Positive
Q4a. How would you rate your general impressions of fishers in Western Australia?

Legitimacy

Oppose

4% do not trust the food produced in WA
Bottom 2 | 1 + 2 |
Q5. How would you rate the food produced by Western Australian farmers and fishers?
'I do not trust the food produced in Western Australia.'

Key Takeouts

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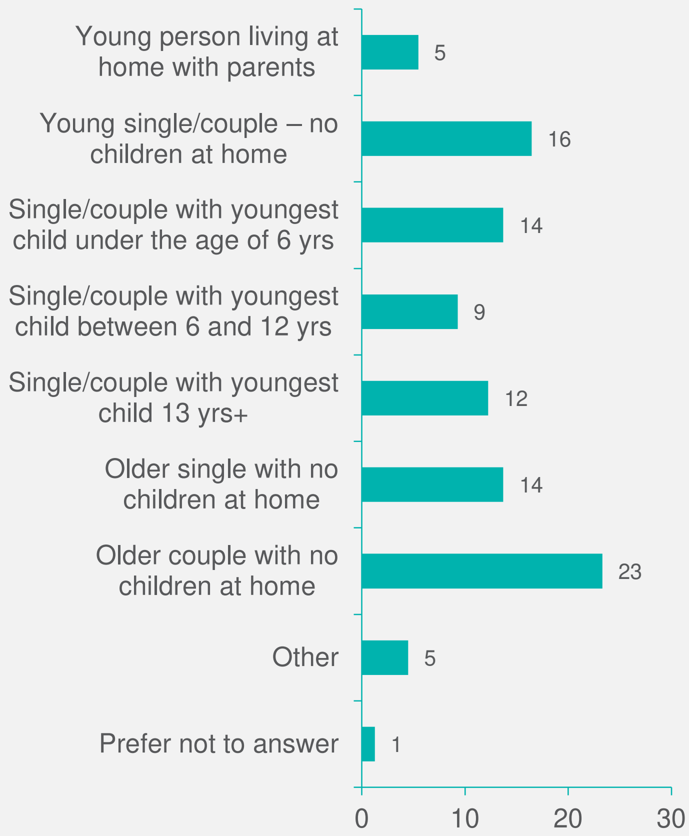
Recommendations

	Insight	Recommendation/ Thought Starter
1	**Food produced** by WA farmers and fishers is highly **trusted and safe**.	Continue to **maintain positive associations** towards the food produced in Western Australia. We cannot assume this perception will remain the same unless it's actively controlled.
2	Being **connected** and **informed** results in higher perceptions.	**Create a campaign to shift the perception of WA farming and fishing.** Extend beyond marketing and PR through a grassroots approach, increasing connectivity and general buy-in. Engage different people in different ways with a long-term view. *E.g. school education, getting supermarkets on board, three-part television series.*
3	**Lower perceptions of fishing families** suggest people are less informed and connected.	**Conduct further research** to understand existing perceptions of the fishing industry. Explore whether this is viewed as an 'industrial' practice or 'family' practice. **Qualitative** research is recommended to extract rich insights for deeper explanation.
4	Uncertainties around the **practicalities and future** of farming and fishing exist.	More needs to be done to communicate **future strategies** aimed at the longevity of the food, farming and fishing industries. *E.g. Tourism WA shared their two-year action plan to grow the number of visitors to the State (2018-2020) to maximise awareness of Western Australian people.*
Overall	Positive consumer perceptions are key to the **overall growth** of the WA, food, farming and fishing industry.	**Repeat the Community Perception survey** on an annual basis across a 3-year period to identify shifts from the viewpoint of WA consumers. The next survey would be be conducted in **September 2020**.

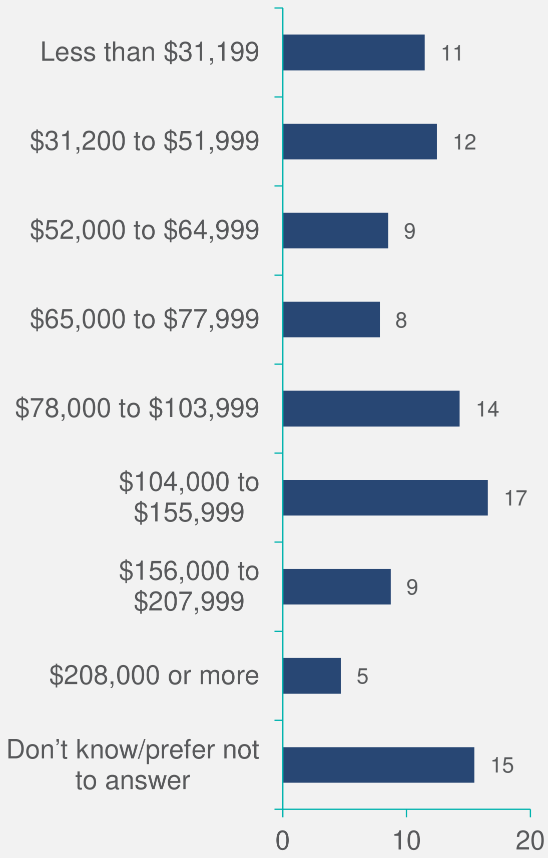
Appendix

Detailed Sample Breakdown

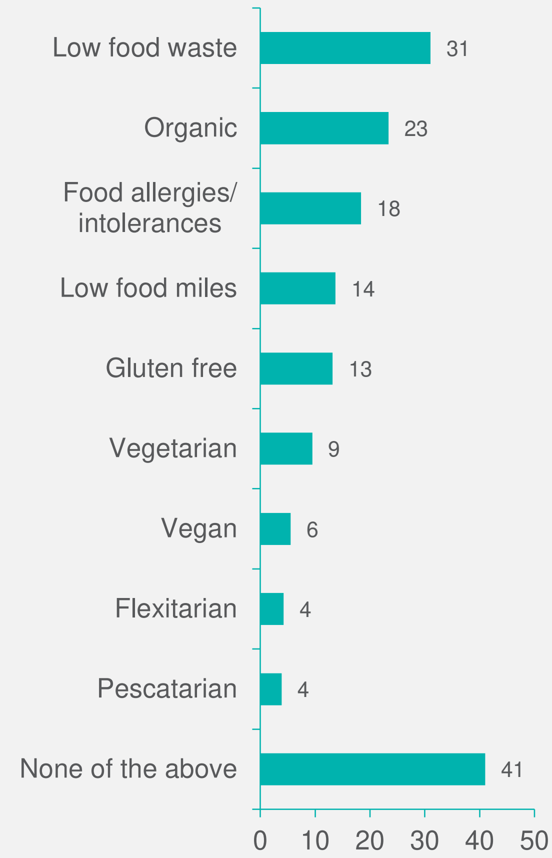
Household Situation



Household Income



Dietary Preference



n=1,021
D1. Which, if any, of the following dietary requirements and food preferences do you consider when buying food?
D11. Which of these best describes your household situation?
D2. What is your annual household income (before tax?)

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