

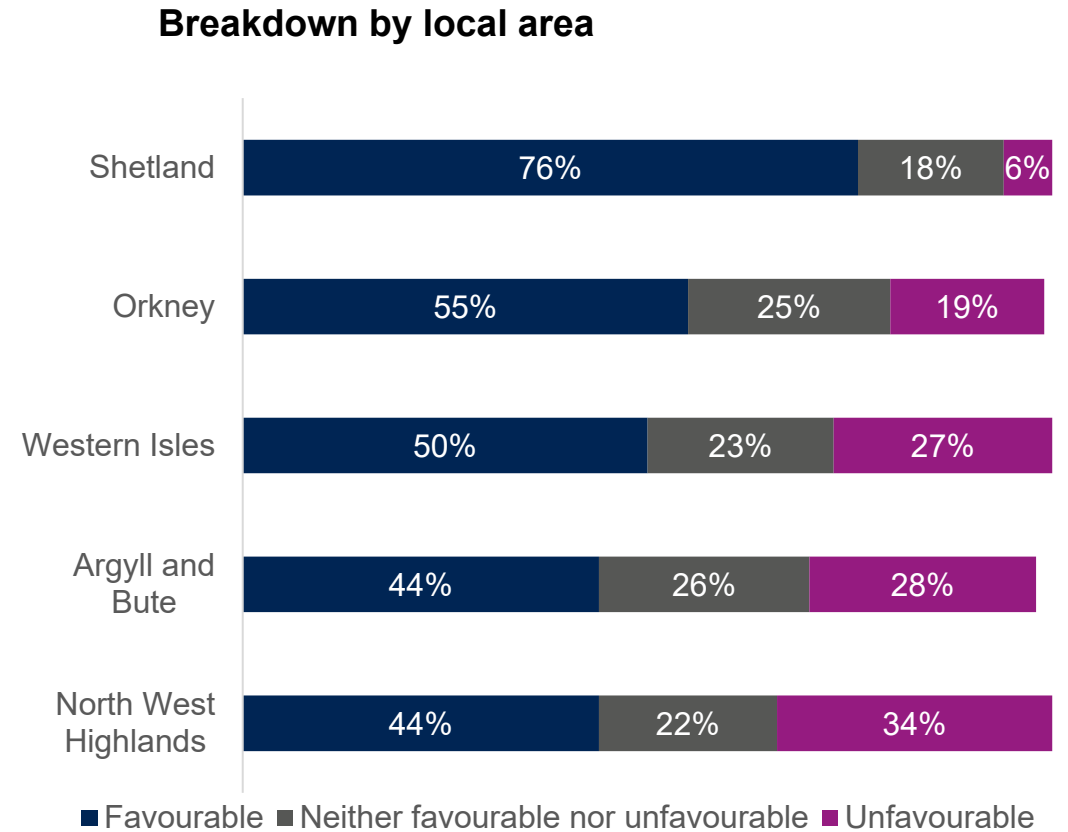
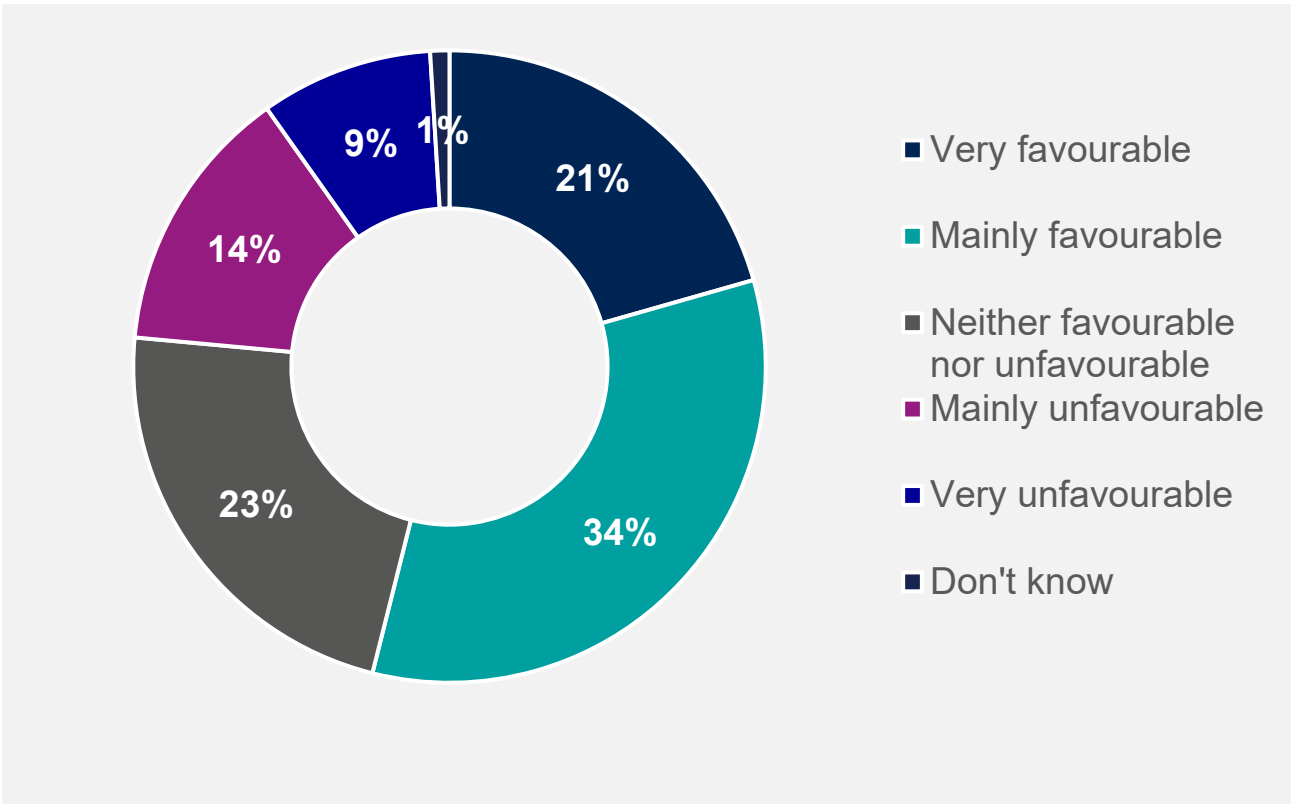
IPSOS POLLING FOR SALMON SCOTLAND

Place the
customer's logo here.
Then remove this block.

March 2022

Of those who know at least a little about salmon farming, over half (54%) are favourable towards it while 23% are unfavourable

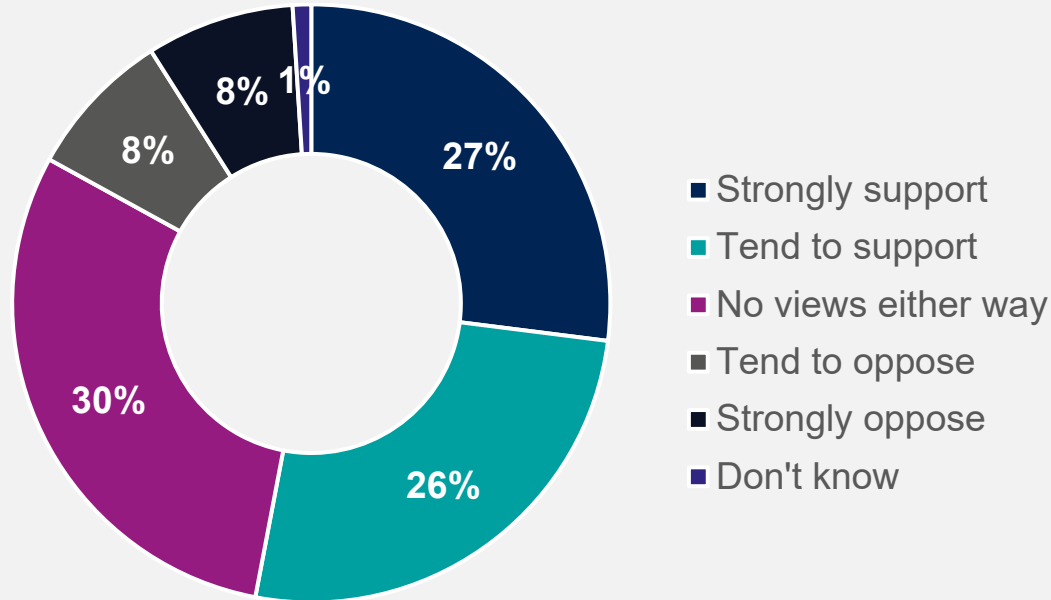
Q. Bearing in mind all that you know or have heard about it, how favourable or unfavourable are your views and opinions about salmon farming?



Base: All who know at least a little about salmon farming = 847; fieldwork = February 1-11 2022

Over half (53%) say they support salmon farms being located in their local area, while 17% oppose this

Q. To what extent do you support or oppose these salmon farms being located in your local area, or do you have no views either way?



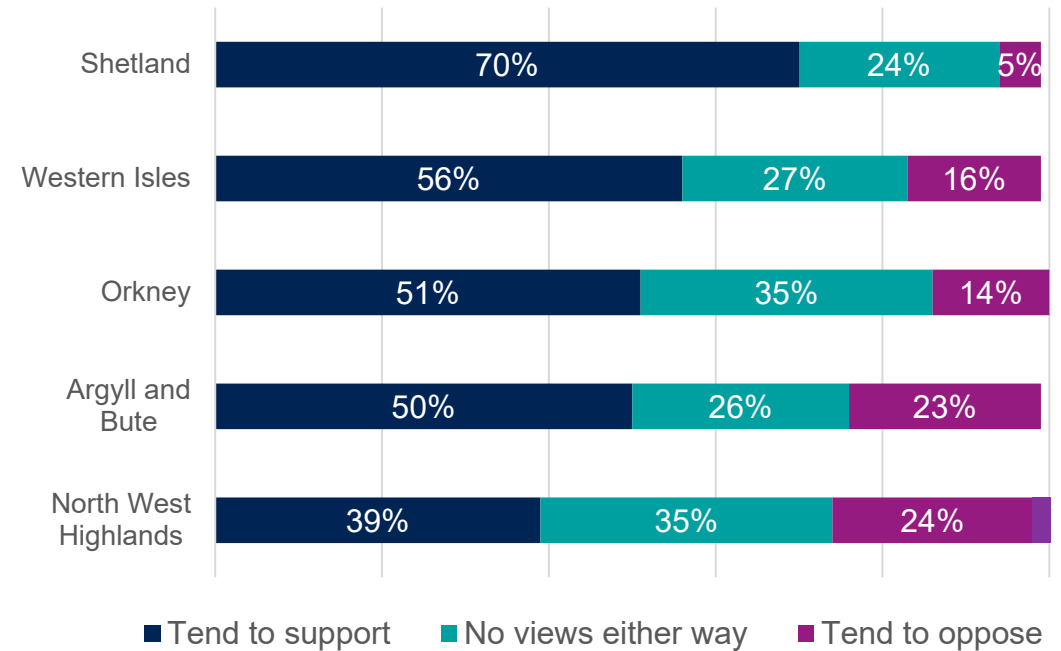
More likely to support salmon farms being located in their local area:

- Those in Shetland (70%), men (60%)

More likely than average to oppose salmon farming in their local area:

- Those in the North West Highlands (24%) or Argyll and Bute (23%), those aged 55-69 (22%), and graduates (21%)

Breakdown by local area



Base: 1,000 residents in one of five local areas in Scotland aged 16+; fieldwork = February 1-11 2022

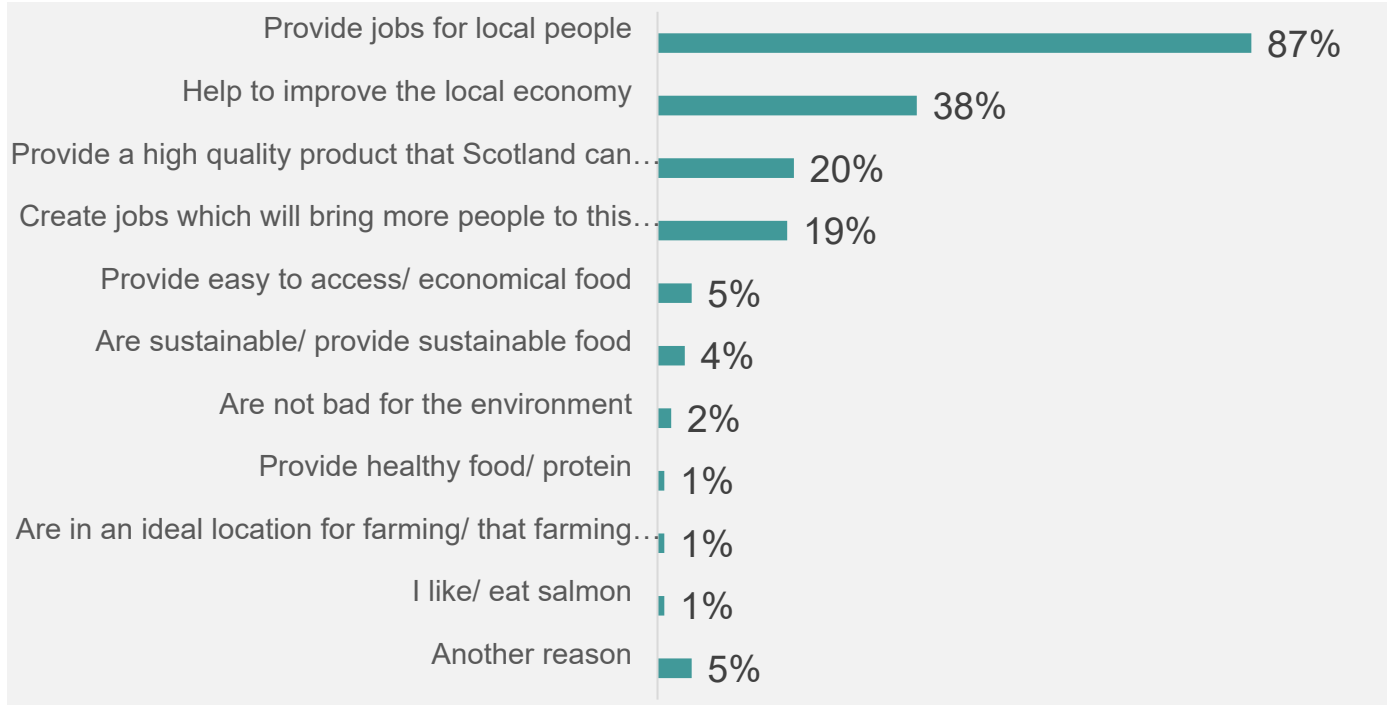
For those who support salmon farms being located in their local area, the main reason driving this is that the farms provide jobs for local people (87%)

3

Further reasons include that salmon farms help to support the economy (38%), provide a high quality product Scotland can be proud of (20%), and create jobs which will bring more people to the local area (19%)

Q What are the main reasons you support this?

Salmon farms...



Breakdowns:

- **More likely to say that salmon farms help improve the local economy:**
Those in Shetland (49%), graduates (45%), and full time workers (44%)

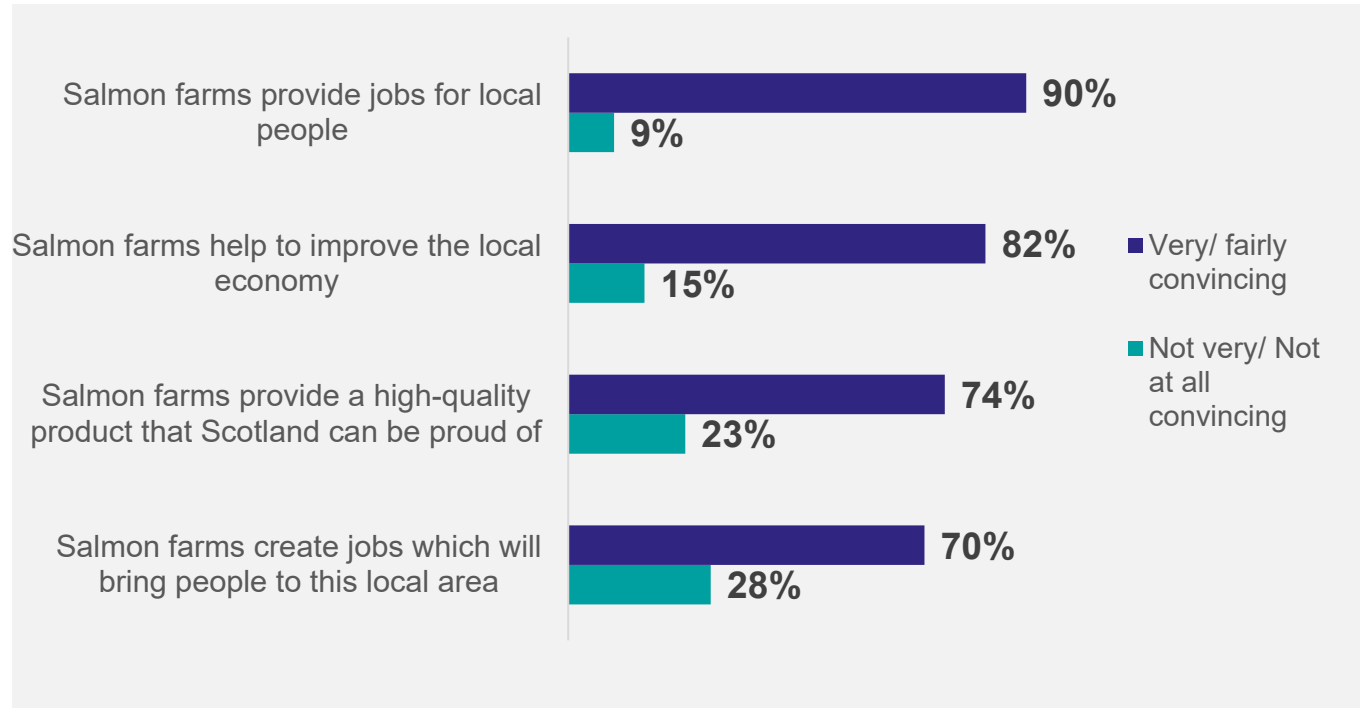
Base: All those who support salmon farming = 538; Fieldwork = February 1-11 2022

For the public overall, the most compelling reasons in favour of salmon farms being located locally relate to providing jobs for local people and improving the local economy

3

Further reasons include that salmon farms provide a high quality product Scotland can be proud of (74%) and create jobs which bring people to the local area (70%)

Q How convincing or otherwise do you personally find each of the following arguments in support of salmon farming being located in your local area?



Breakdowns (more likely than average):

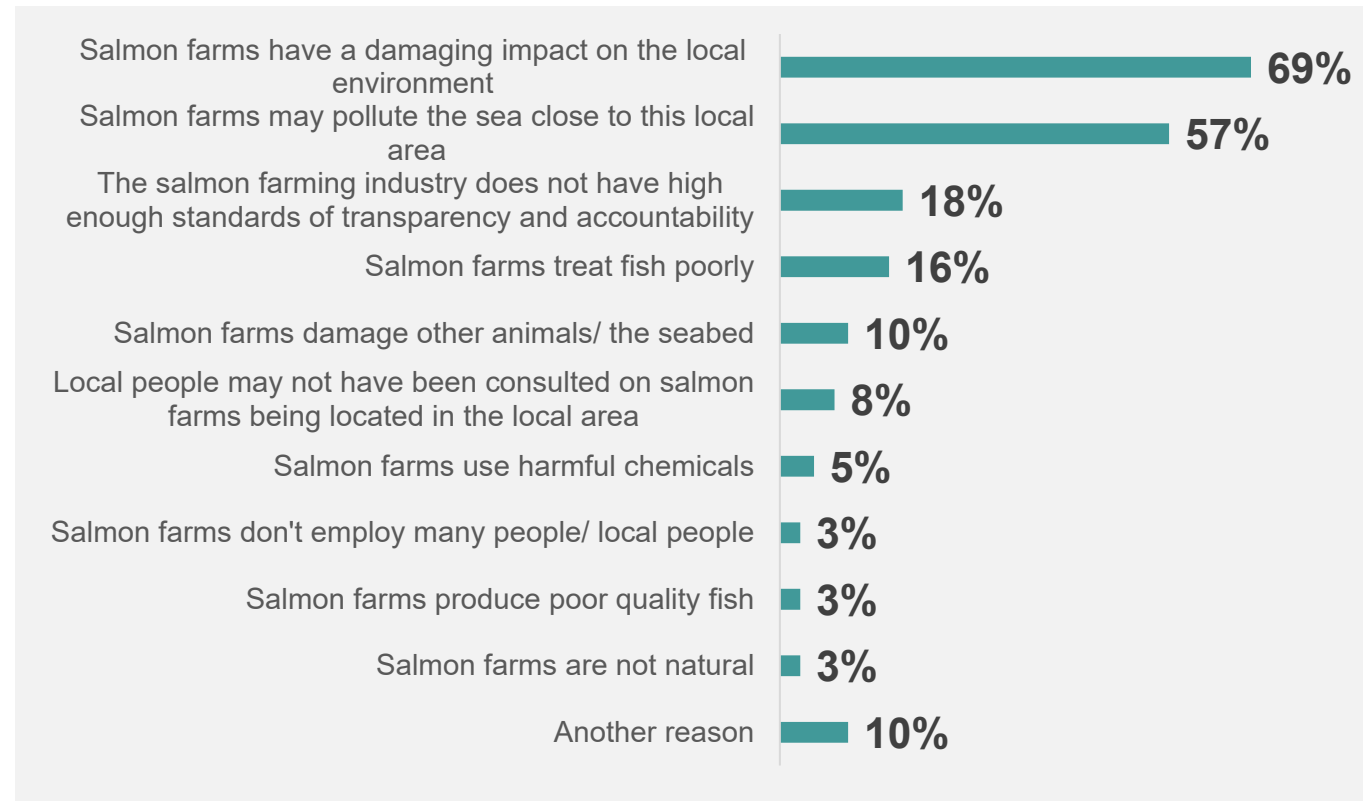
- Those in **Shetland** are more likely to find all of the arguments convincing
- Those in **Orkney** are more likely (82%) than the public in these areas overall to find the argument that 'salmon farms provide a high quality product Scotland can be proud of' convincing
- **Men** are more likely (85%) to find the argument that 'salmon farms help to improve the local economy' convincing
- Those with **no formal qualifications** are more likely (85%) to find the argument that 'salmon farms provide a high quality product Scotland can be proud of' convincing

Base: 1,000 residents in one of five local areas in Scotland aged 16+; fieldwork = February 1-11 2022

For those who oppose salmon farms being located in their local area, the main reasons driving this opposition are concerns about their impact on the local environment and marine pollution

Other reasons for opposition include the salmon farming industry not having high enough standards of transparency and accountability (19%) and treating fish poorly (16%)

Q. What are the main reasons you oppose this?



Breakdowns* (more likely than average):

- **Those aged 55-69 were:** more likely to say that salmon farms may pollute the sea close to the local area (72%), and that the salmon farming industry does not have high enough standards of transparency and accountability (31%)
- **More likely to say that salmon farms treat fish poorly:** Those aged 35-54 (26%)
- **More likely to say that local people may not have been consulted on salmon farms being located in the local area:** Those from Argyll and Bute (17%)

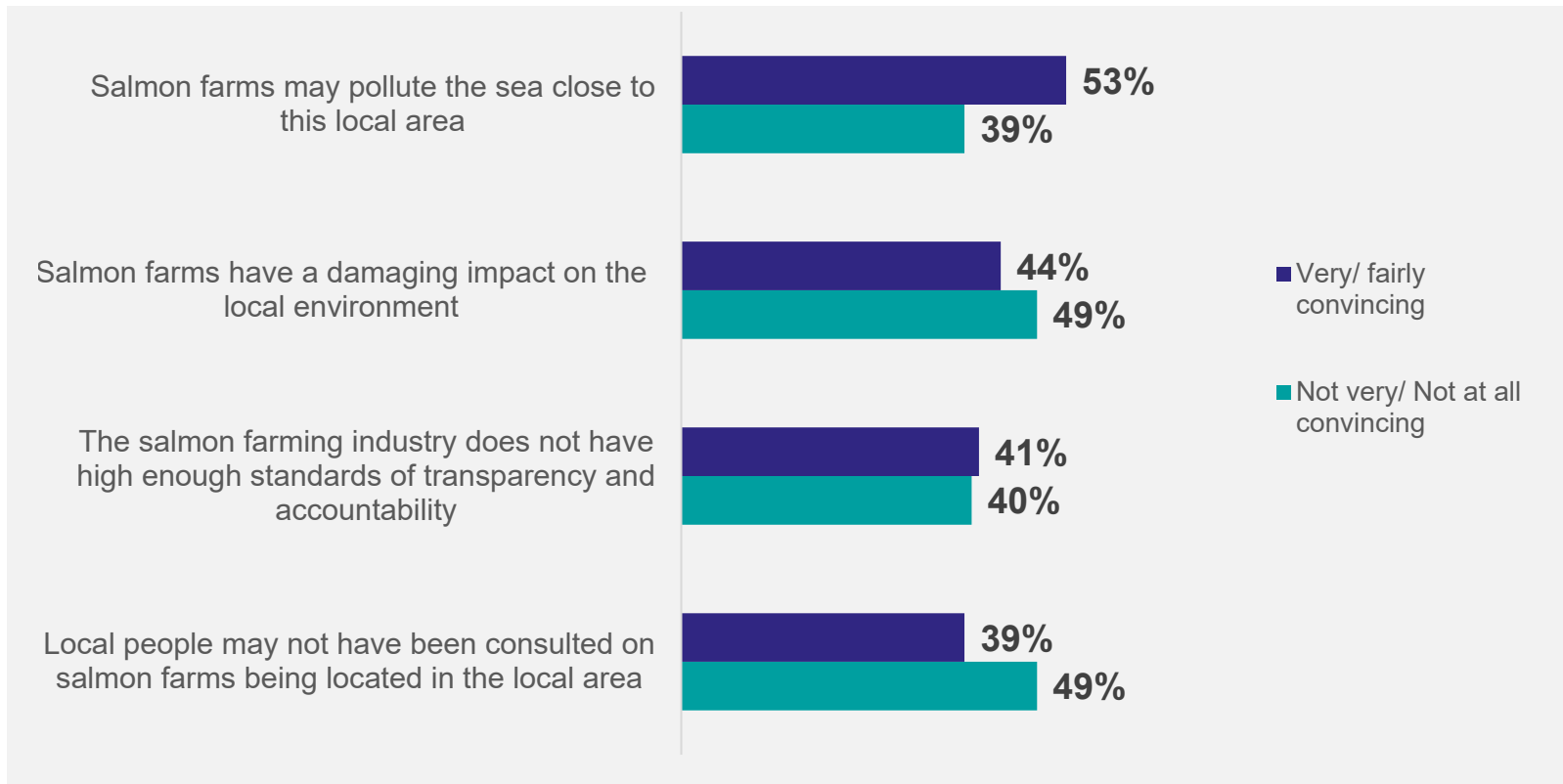
Base: All those who oppose salmon farming = 171; fieldwork = February 1-11 2022

*NB: small sample size so breakdowns are indicative only

For the public overall, the most convincing reasons against salmon farms being located locally relate to marine pollution and the impact on the local environment

4

Q. And how convincing, or otherwise, do you personally find each of the following arguments against salmon farms being located in your local area?



See the next slide for breakdowns

Base: 1,000 residents in one of five local areas in Scotland aged 16+; fieldwork = February 1-11 2022

Certain arguments against salmon farms being located locally were more convincing for those living in Argyll and Bute, the North West Highlands, and the Western Isles

4

Those from Argyll and Bute were...

- More likely than the public across the five areas overall to find the argument convincing that 'the salmon farming industry does not have high enough standards of transparency and accountability' (52%)

Those from the North West Highlands were...

- More likely to find the arguments convincing that 'salmon farms have a damaging impact on the local environment' (52%), that 'the salmon farming industry does not have high enough standards of transparency and accountability' (49%), and that 'local people may not have been consulted on salmon farms being located in the local area' (46%)

Some arguments against salmon farms were more convincing for particular demographic groups

- Graduates were more likely to find the arguments convincing that 'salmon farms may pollute the sea close to this local area' (61%), that 'salmon farms have a damaging impact on the local environment' (55%), and that 'the salmon farming industry does not have high enough standards of transparency and accountability' (49%)
- Those aged 55-69 were more likely to find the argument convincing that 'salmon farms may pollute the sea close to the local area' (58%)
- Women were more likely (44%) to find the argument convincing that 'local people may not have been consulted on salmon farms being located in their local area'

About the research

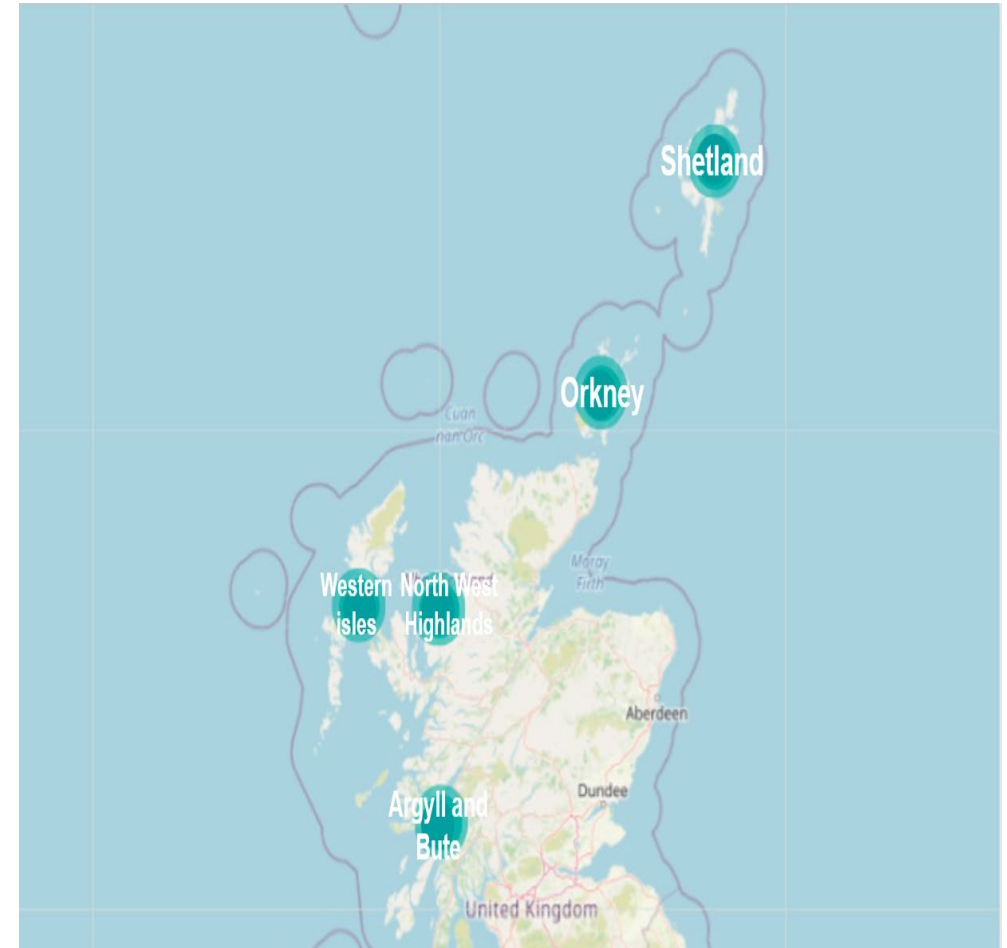
5

Background

- Salmon Scotland commissioned Ipsos to conduct research into local perceptions of salmon farming across five key areas where salmon farms are situated in Scotland: Argyll and Bute, North West Highlands, Orkney, Shetland, and the Western Isles.

Methodology

- Telephone survey among a representative sample of 1,000 adults aged 16+.
- The research team at Ipsos identified postcodes within a 10-mile distance from a salmon farm in each of the five areas. Perceptions of those within a ten mile distance were captured. For the Western Isles, Orkney, and Shetland, the sample selection also included random-digit dialling to obtain the anticipated sample size of 200 respondents per area (1,000 in total).
- Further quotas were set for age, working status, and gender based on the population in the five selected local areas.
- Data are weighted to the profile of the population in the five local areas.



THANK YOU.

Stefania Pagani

Senior Researcher,

Ipsos Scotland

Stefania.Pagani@ipsos.com

Emily Gray

Managing Director,

Ipsos Scotland

Emily.Gray@ipsos.com

Ipsos' Standards & Accreditations

Ipsos' standards & accreditations provide our clients with the peace of mind that they can always depend on us to deliver reliable, sustainable findings. Moreover, our focus on quality and continuous improvement means we have embedded a 'right first time' approach throughout our organisation.



ISO 20252 – is the international market research specific standard that supersedes BS 7911 / MRQSA & incorporates IQCS (Interviewer Quality Control Scheme); it covers the 5 stages of a Market Research project. Ipsos was the first company in the world to gain this accreditation.



MRS Company Partnership – By being an MRS Company Partner, Ipsos endorse and support the core MRS brand values of professionalism, research excellence and business effectiveness, and commit to comply with the MRS Code of Conduct throughout the organisation & we were the first company to sign our organisation up to the requirements & self regulation of the MRS Code; more than 350 companies have followed our lead.



ISO 9001 – International general company standard with a focus on continual improvement through quality management systems. In 1994 we became one of the early adopters of the ISO 9001 business standard.



ISO 27001 – International standard for information security designed to ensure the selection of adequate and proportionate security controls. Ipsos was the first research company in the UK to be awarded this in August 2008.



The (EU) 2016/679 General Data Protection Regulation (GDPR) & the UK Data Protection Act 2018 (DPA) – Ipsos is required to comply with the General Data Protection Regulation and the UK Data Protection Act; it covers the processing of personal data and the protection of privacy.

Ipsos is an active member of **EphMRA** and **BHBIA**.



HMG Cyber Essentials – A government backed and key deliverable of the UK's National Cyber Security Programme. Ipsos was assessment validated for certification in 2016. Cyber Essentials defines a set of controls which, when properly implemented, provide organisations with basic protection from the most prevalent forms of threat coming from the internet.



Fair Data – Ipsos is signed up as a 'Fair Data' Company by agreeing to adhere to ten core principles. The principles support and complement other standards such as ISOs, and the requirements of Data Protection legislation.

This work was carried out in accordance with the requirements of the international quality standard for market research, ISO 20252 and with the Ipsos Terms and Conditions.