

s. 22(1)(a)(ii)

From: s. 22(1)(a)(ii)
Sent: Tuesday, 15 August 2023 5:06 PM
To: s. 47F(1)
Cc: s. 22(1)(a)(ii); s. 47F(1) ; s. 22(1)(a)(ii)
Subject: RE: 2021 ROP Recommendation 2.2 [SEC=OFFICIAL]

Hi ^{s. 47F(1)}

Thank you for updating the document. We are happy with marking recommendation 2.2 as complete once the Executive Summary and statement are included on the website and shared with WICP members (and/or the broader industry).

We are interested in seeing how the findings are informing RD&E decisions and how AWI is communicating it woolgrowers. We feel this can be done through our regular updates and don't need to be managed through the ROP implementation process.

Kind regards

^{s. 22(1)}

s. 22(1)(a)(ii)

Assistant Director | Livestock
Livestock and Strategy Branch | Agricultural Policy Division
Department of Agriculture, Fisheries and Forestry
s. 22(1)(a)(ii) | ^{s. 22(1)(a)(ii)} [@aff.gov.au](mailto:s.22(1)(a)(ii)@aff.gov.au)

From: s. 47F(1) <s. 47F(1)@wool.com>
Sent: Monday, August 14, 2023 2:03 PM
To: s. 22(1)(a)(ii) <s. 22(1)(a)(ii)@aff.gov.au>
Cc: s. 22(1)(a)(ii) <s. 22(1)(a)(ii)@aff.gov.au>; s. 47F(1) <s. 47F(1)@wool.com>
Subject: Re: 2021 ROP Recommendation 2.2 [SEC=OFFICIAL]

Hi ^{s. 22(1)}

Thank you for your feedback on the executive summary report. The report has been updated to reflect that the report will inform AWI's R&D, is communicated to wool growers and our supply chain. Please let me know if this additional statement prior to the Executive Summary outlining how AWI intends to use the findings of the report satisfy the fulfillment of the recommendation.

Yes, I can confirm that economic modelling was not undertaken as part of this survey. s. 47G(1)(a)

Speak soon,

^{s. 47F(1)}

s. 47F(1)

s. 47F(1)

T: s. 47F(1)

M: s. 47F(1)

Australian Wool Innovation Limited
Level 3, 24 York Street, Sydney, NSW 2000



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Innovation Limited



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This email including attachments may be confidential. If this email has been sent to you by mistake please inform the sender Australian Wool Innovation Limited (AWI) ABN 12 095 165 558 by reply email and then delete the email.

COVID-19

Australian Wool Innovation / The Woolmark Company (AWI/TWC) continues to monitor the COVID-19 (Coronavirus) situation closely and our staff in Sydney have now physically resumed work in the office. In the interests of protecting all staff and partners we work closely with, this may vary within other TWC global offices and is dependent on the Government and Public Health Authority in each country. We are very confident in the technology the company has set up and mobility devices allow all functions of the business to continue effectively for any offices on days they may be working remotely.

From: s. 22(1)(a)(ii) <s. 22(1)(a)(ii)@aff.gov.au>

Date: Friday, 11 August 2023 at 10:29 am

To: s. 47F(1) <s. 47F(1)@wool.com>

Cc: s. 22(1)(a)(ii) <s. 22(1)(a)(ii)@aff.gov.au>, s. 47F(1) <s. 47F(1)@wool.com>

Subject: RE: 2021 ROP Recommendation 2.2 [SEC=OFFICIAL]

Hi ^{s. 47F(1)}

Sorry for the delay in responding to your email.

We agree that publishing the Executive Summary on wool.com and sharing it with WICP members will satisfy the overarching recommendation. However, we don't agree that the subtext of the recommendation will be met by only sharing the Executive Summary.

Recommendation 2.2 mentions that the report should be used to inform AWI RD&E expenditure and assist in communications with both woolgrowers and the supply chain. We feel AWI should provide an additional statement along with the Executive Summary outlining how AWI intend to use the findings of the report to inform these areas.

It also notes the report should include economic modelling to determine the impacts of mulesing sentiment trends on wool price and production. However, as we agreed to the amended scope of the survey I understand this may not have been included in the report. Are you able to confirm this please?

At this stage we request AWI do not mark this recommendation as complete until the above concerns are addressed and resolved.

^{s. 22(1)(a)(i)} and I are happy to discuss this further with you if required.

Kind regards

^{s. 22(1)}

s. 22(1)(a)(ii)

Assistant Director | Livestock

Livestock and Strategy Branch | Agricultural Policy Division
 Department of Agriculture, Fisheries and Forestry
 s. 22(1)(a)(ii) | s. 22(1)(a)(ii)@aff.gov.au

From: s. 47F(1) <s. 47F(1)@wool.com>
Sent: Wednesday, August 9, 2023 11:29 AM
To: s. 22(1)(a)(ii) <s. 22(1)(a)(ii)@aff.gov.au>
Subject: FW: 2021 ROP Recommendation 2.2

Hi s. 22(1)

Just wanted to follow up on the survey summary of s. 47G(1)(a) . Is it ok to put the summary on wool.com?

s. 47F(1)

s. 47F(1)
 s. 47F(1)
 T: s. 47F(1)
 M: s. 47F(1)
 Australian Wool Innovation Limited
 Level 3, 24 York Street, Sydney, NSW 2000



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From: s. 47F(1) <s. 47F(1)@wool.com>
Date: Thursday, 3 August 2023 at 4:05 pm
To: s. 22(1)(a)(ii) <s. 22(1)(a)(ii)@aff.gov.au>, s. 22(1)(a)(ii) <s. 22(1)(a)(ii)@aff.gov.au>
Cc: s. 47F(1) <s. 47F(1)@wool.com>
Subject: 2021 ROP Recommendation 2.2

Hi s. 22(1)(a)(ii) and s. 22(1)

At its meeting on 14 July the AWI board considered the survey of s. 47G(1)(a) re buyer views on mulesed wool. The Board determined to share the executive summary of the report with the WICP. The executive summary was presented and discussed at the 27 July WICP meeting.

I am writing to seek your views on whether or not posting the executive summary on www.wool.com on the 2021 ROP web page (<https://www.wool.com/about-awi/how-we-consult/rop-2021/>), and sharing it with the WICP, qualify as completing this recommendation at 100%?

Happy to discuss if you have an alternative view.

Speak soon,

s. 47F(1)

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Australian Wool
Innovation Limited

BUYER VIEWS ON MULESED WOOL SURVEY JUNE 2023

*An international survey of 198 wholesale and
retail users of wool across 27 countries*



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SURVEY OVERVIEW

AWI's 2021 independent Review of Performance recommended the commissioning of an independent report to measure international sentiment towards mulesed wool.

In May 2023 AWI engaged Pragmatic Research as a probity advisor to assist with the development of a survey of wholesale and retail users of wool, across 27 countries, on consumer attitudes towards sustainability issues and the impact these have on running their businesses and meeting customer demand. The survey found that environmental sustainability was important to most aspects of their businesses, including:

- Environmental sustainability was important
- Recycling and renewing are primary sustainability considerations
- Animal welfare and mulesing are mid-tier priorities
- Wool is seen as a sustainable fibre
- Price, look, feel and care are the main challenges, and
- There is a diversity of views vary across markets around animal welfare and mulesing

We share the survey findings with AWI's wool industry consultation groups, the Woolgrower Industry Consultation Panel (WICP) and the Woolgrower Consultation Group (WCG), on wool.com, and at grower workshops and events like Future Wool. The survey results help inform AWI's R, D & E planning and expenditure. AWI provides wool growers with a range of tools and workshops to assist with the management of flystrike and/or to move towards a mules free enterprise.

Additionally, the results are shared across the AWI/Woolmark global network of business development managers and their partners. The survey will be used as a baseline for future research on consumer attitudes towards sustainability issues.

The survey provides an important snapshot on how sustainability considerations are prioritised in different markets and the challenges they represent to these businesses.

EXECUTIVE SUMMARY

The comprehensive survey of 198 wholesale and retail users of wool across 27 countries provides an important snapshot on how sustainability considerations are prioritised in different markets and the challenges they represent to these businesses.

Key findings from the survey include:

- Environmental sustainability was important to most aspects wholesale and retail businesses, especially marketing, business strategy and meeting regulatory requirements and amongst Chinese and Southeast Asian wholesale and retail users of wool.
- Recycling and renewing are the main sustainability considerations. Using recycled materials (65%), renewable energy (57%), regenerative materials (52%) and biodegradable materials (52%) were the main priorities for wholesale and retail users of wool.
- Animal welfare and mulesing are mid-tier priorities. Animal welfare standards (46%) and using non-mulesed wool (45%) were comparatively less of a priority, although still a consideration for almost half the sample.
- Wool is seen as a sustainable fibre. For the majority of wholesale and retail users of wool respondents, wool was seen as a 'very sustainable' fibre (55%). Just over a third (39%) also considered wool 'quite sustainable'. Only 6% questioned the sustainability of wool.
- Price, look and feel and care are the main challenges, animal welfare and mulesing are lower-level concerns. Price (8.2) and product look, feel and care requirements (7.0) are the main challenges for selling wool products. Attitudes around mulesed wool (6.8) and animal welfare standards (6.1) were seen as relatively less of a challenge.
- Diversity of views around animal welfare and mulesing, highest concern in Europe. The perceived priority and challenges of these two issues varies across markets, reflecting the different cultural and economic environments. Although they are most pertinent for European wholesale and retail users of wool (especially in Germany), where the well-established animal rights movement has led to a number of anti-mulesing protests. By contrast, most Asian markets (and Australia) were generally less concerned by the impact of animal welfare standards and the use of mulesed wool on their businesses.
- Benchmark for future tracking. This study is the first of its kind to offer a comprehensive and accurate view of the attitudes wholesale and retail users of wool to sustainability issues. The robust sample of 198 ensures the credibility of the results. We would recommend the study is repeated every three to five years to monitor shifts in attitudes to inform AWI's decision making and strategies.

s. 22(1)(a)(ii)

From: s. 47F(1) <s. 47F(1)@wool.com>
Sent: Monday, 27 March 2023 4:25 PM
To: s. 22(1)(a)(ii); s. 22(1)(a)(ii)
Cc: s. 47F(1)
Subject: AWI 2021 ROP Implementation Progress [SEC=UNOFFICIAL]
Attachments: s. 22(1)(a)(ii) s. 22(1)(a)(ii)
 2.2 Pragmatic email.pdf; 2.2 s. 47G(1)(a) email and qst
 F1.pdf; s. 22(1)(a)(ii) s. 22(1)(a)(ii)

Hi s. 22(1)(a)(ii) and s. 22(1)(a)(ii)

s. 22(1)(a)(ii)

- 2.2 – Changed to 50%
 - Planning is well underway for the survey of s. 47G(1)(a) . Pragmatic Research has been appointed as the probity adviser for the survey.
 - Attachments
 - Email from Pragmatic Research on next steps
 - Draft email content to Woolmark Business Development Managers and survey questions

s. 22(1)(a)(ii)

s. 22(1)(a)(ii)

Speak soon,

s. 47F(1)

s. 47F(1)

T: s. 47F(1)

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Australian Wool Innovation Limited
Level 3, 24 York Street, Sydney, NSW 2000



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COVID-19

Australian Wool Innovation / The Woolmark Company (AWI/TWC) continues to monitor the COVID-19 (Coronavirus) situation closely and our staff in Sydney have now physically resumed work in the office. In the interests of protecting all staff and partners we work closely with, this may vary within other TWC global offices and is dependent on the Government and Public Health Authority in each country. We are very confident in the technology the company has set up and mobility devices allow all functions of the business to continue effectively for any offices on days they may be working remotely.

s. 47F(1)³ - IR 30524**Subject:** s. 47G(1)(a) survey: next steps**Date:** Tuesday, 21 March 2023 at 2:22:57 pm Australian Eastern Daylight Time**From:** s. 47F(1)**To:** s. 47F(1), s. 47F(1)**CC:** s. 47F(1)

Hi all

Thanks ^{s. 47F(1)} for the meeting today and apologies for my technical problems.

It feels like we're getting close to launch

Next steps (mostly s. 47F(1) and ^{s. 47F(1)} working out the mechanics of the emailing and surveying).

- Translate BDM email and survey into Mandarin, Korean and Japanese (finalised doc attached). I will leave ^{s. 47F(1)} and s. 47F(1) to action this
- Set up system with CRM and qualtrics for BDMs to send emails to individual s. 47G(1)(a), s. 47F(1) and ^{s. 47F(1)} to chat about how this can best work
- April Newsletter will mention survey, we will aim to send official emails out by April 28

Monitoring responses

After the initial email out we will monitor responses. s. 47F(1) would it be OK for me to have access to the qualtrics account so I can monitor the surveys coming in and overall response rates? This would save me having to hassle you every few days to see where things are at. Let me know

Follow-up reminders

Depending on response rates (we should see a spike in the first few days which will trail off), we can send reminder emails to those ^{s. 47G(1)(a)} who haven't responded. This can either be centrally done through qualtrics and/or more personally delivered by BDMs depending on their relationships with the ^{s. 47G(1)(a)}. We can be quite flexible about this based on how the responses are looking.

At this stage I think we will likely send weekly reminders, which will include a deadline to get people moving. All up I think fieldwork will take about four weeks. We don't want to hassle ^{s. 47G(1)(a)} too much so will have to pull the plug eventually. ^{s. 47F(1)} to work on reminder email content for approval.

How does all that sound?

s. 47F(1) can we find an hour in the next few days to chat through the above?

We can then report back to ^{s. 47F(1)} and s. 47F(1) once things are finalised.

Thanks all
^{s. 47F(1)}

s. 47F(1)

Phone: s. 47F(1)

Email: ^{s. 47F(1)} @pragmaticresearch.com.au

www.pragmaticresearch.com.au

PRAGMATIC

research and advisory services

27 March 2023

DRAFT: suggested BDM email to s. 47G(1)(a)

SUBJECT: The impact of environmental sustainability issues on your business

Dear [Name]

Woolmark is asking your assistance in completing a short five minute survey on environmental sustainability.

We are seeking to understand the impact of environmental sustainability factors on our s. 47G(1)(a) businesses globally.

To help with this, we would appreciate you taking a moment to complete this online survey (XX SURVEY LINK). It should take less than 5 minutes to complete, and all your answers will remain confidential. Please feel free to circulate this email with the survey link to others within your business to complete.

Woolmark has commissioned independent research agency, Pragmatic Research, to conduct the survey. They have a strong reputation in survey design and implementation and extensive experience working with the Australian wool sector.

We appreciate your honest feedback.

(XX SURVEY LINK)

If you have any questions, please feel free to make contact.

Kind regards

[Your Name]
[Position Title]

s. 47G(1)(a) survey

ONCE THEY CLICK LINK AND LAND ON PAGE

Thank you for agreeing to take part in this brief survey about how environmental sustainability issues effect your business and customers.

It should take less than 5 minutes to complete and all your answers will remain confidential.

We have commissioned an independent research agency, Pragmatic Research, to conduct the survey. If you have problems completing the survey, feel free to contact s. 47F(1) at s. 47F(1)@pragmaticresearch.com.au who can answer any questions you may have.

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research and advisory services

27 March 2023

Terms and Conditions

I understand and agree that the answers to my submission may be made publicly available as part of the aggregated survey results, but that my personal information, as well as the identity, details and any identifying information of my brand, will be kept confidential and non-identifiable.

☐ Tick box

CONTINUE TO SURVEY (link)

First, some brief details about your company (XX possibility to prefill or post fill if information is available in database)

1. Company name
2. Country
- 3.

(Note: this information will not be identifiable in the aggregated survey results)

4. How important is **environmental sustainability** when it comes to the following aspects of your business? On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important

Importance of environmental sustainability on....	Not at all important										Extremely important
	0	1	2	3	4	5	6	7	8	9	10
Business strategy											
Marketing											
Brand											
Sales											
Meeting regulatory requirements											
Profitability											

5. Which of the following sustainability considerations are priorities for your business
Please select all that apply. RANDOMISE LIST

Animal welfare standards	
Using biodegradable materials	
Enhancing biodiversity	
Carbon footprint reduction	
Chemical management	
Greenhouse gas emissions reduction	
Using local supply chains and production	
Using non-mulesed wool	
Using natural materials over man-made/synthetic materials	
Using recycled materials	
Using regenerative materials	

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27 March 2023

Using renewable energy use	
Water pollution reduction (from microplastic shedding and dyeing)	
Zero waste design and manufacturing	

6. As a fibre, how sustainable is wool? Select one

Very sustainable	
Quite sustainable	
Not that sustainable	
Not at all sustainable	
Not sure	

7. How much of a challenge are each of the following when selling wool products to customers? On a scale of 0 to 10, where 0 no challenge at all and 10 is a major challenge

	Not challenge at all										A major challenge
	0	1	2	3	4	5	6	7	8	9	10
Animal welfare standards											
Product care requirements											
Environmental concerns with raising livestock											
The look and feel of the product											
Attitudes around mulesed wool											
Price											

8. Are there any other challenges you face when selling wool products to customers?

- a. Yes
- b. No

9. IF YES, what are these challenges? OPEN ENDED QUESTION

Thank you for your participation

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Executive summary

The comprehensive survey of 198 wholesale and retail users of wool across 27 countries provides an important snapshot on how sustainability considerations are prioritised in different markets and the challenges they represent to these businesses.

Key findings from the survey include:

- **Environmental sustainability was important to most aspects wholesale and retail businesses**, especially marketing, business strategy and meeting regulatory requirements and amongst Chinese and Southeast Asian wholesale and retail users of wool.
- **Recycling and renewing are the main sustainability considerations**. Using recycled materials (65%) , renewable energy (57%), regenerative materials (52%) and biodegradable materials (52%) were the main priorities for wholesale and retail users of wool.
- **Animal welfare and mulesing are mid-tier priorities**. Animal welfare standards (46%) and using non-mulesed wool (45%) were comparatively less of a priority, although still a consideration for almost half the sample.
- **Wool is seen as a sustainable fibre**. For the majority of wholesale and retail users of wool respondents, wool was seen as a 'very sustainable' fibre (55%). Just over a third (39%) also considered wool 'quite sustainable'. Only 6% questioned the sustainability of wool.
- **Price, look and feel and care are the main challenges, animal welfare and mulesing are lower-level concerns**. Price (8.2) and product look, feel and care requirements (7.0) are the main challenges for selling wool products. Attitudes around mulesed wool (6.8) and animal welfare standards (6.1) were seen as relatively less of a challenge.
- **Diversity of views around animal welfare and mulesing, highest concern in Europe**. The perceived priority and challenges of these two issues varies across markets, reflecting the different cultural and economic environments. Although they are most pertinent for European wholesale and retail users of wool (especially in Germany), where the well-established animal rights movement has led to a number of anti-mulesing protests. By contrast, most Asian markets (and Australia) were generally less concerned by the impact of animal welfare standards and the use of mulesed wool on their businesses.
- **Benchmark for future tracking**. This study is the first of its kind to offer a comprehensive and accurate view of the attitudes wholesale and retail users of wool to sustainability issues. The robust sample of 198 ensures the credibility of the results. We would recommend the study is repeated every three to five years to monitor shifts in attitudes to inform AWI's decision making and strategies.



BUYER VIEWS ON MULESED WOOL

International survey of **s. 47G(1)(a)**

Final research report: June 8, 2023

PRAGMATIC

RESEARCH & ADVISORY SERVICES

s. 47F(1)

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ABN: 75 284 080 025

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Executive summary

Executive summary

The comprehensive survey of 198 **s. 47G(1)(a)** across 27 countries provides an important snapshot on how sustainability considerations are prioritised in different markets and the challenges they represent to these businesses.

Key findings from the survey include:

- **Environmental sustainability was important to most aspects of the **s. 47G(1)(a)** businesses**, especially marketing, business strategy and meeting regulatory requirements and amongst Chinese and Southeast Asian **s. 47G(1)(a)**.
- **Recycling and renewing are the main sustainability considerations.** Using recycled materials (65%) , renewable energy (57%), regenerative materials (52%) and biodegradable materials (52%) were the main priorities for **s. 47G(1)(a)**.
- **Animal welfare and mulesing are mid-tier priorities.** Animal welfare standards (46%) and using non-mulesed wool (45%) were comparatively less of a priority, although still a consideration for almost half the sample.
- **Wool is seen as a sustainable fibre.** For the majority of **s. 47G(1)(a)** respondents, wool was seen as a 'very sustainable' fibre (55%). Just over a third (39%) also considered wool 'quite sustainable'. Only 6% questioned the sustainability of wool.
- **Price, look and feel and care are the main challenges, animal welfare and mulesing are lower-level concerns.** Price (8.2) and product look, feel and care requirements (7.0) are the main challenges for selling wool products. Attitudes around mulesed wool (6.8) and animal welfare standards (6.1) were seen as relatively less of a challenge.
- **Diversity of views around animal welfare and mulesing, highest concern in Europe.** The perceived priority and challenges of these two issues varies across markets, reflecting the different cultural and economic environments. Although they are most pertinent for European **s. 47G(1)(a)** (especially in Germany), where the well-established animal rights movement has led to a number of anti-mulesing protests. By contrast, most Asian markets (and Australia) were generally less concerned by the impact of animal welfare standards and the use of mulesed wool on their businesses.
- **Benchmark for future tracking.** This study is the first of its kind to offer a comprehensive and accurate view of the attitudes of **s. 47G(1)(a)** to sustainability issues. The robust sample of 198 ensures the credibility of the results. We would recommend the study is repeated every three to five years to monitor shifts in attitudes to inform AWI's decision making and strategies.

Project objectives

AWI sought to understand the views of **s. 47G(1)(a)** around the issue of mulesed wool within the broader context of sustainability issues and the impact these have on running their businesses and meeting customer demand.

In particular, the focus was on understanding:

- The importance of environmental sustainability on aspects of their business
- The priorities they place on different sustainability considerations
- The challenges they face in selling wool to customers
- Views on the sustainability of wool
- How animal welfare standards and the use of mulesed or non-mulesed wool fits within the above

Methodology

AWI commissioned Pragmatic Research to design and implement a survey of s. 47G(1)(a), gather their responses, analyse the data and report on the results. The methodology involved the following.

1. Questionnaire review

We reviewed the current questionnaire draft to ensure questions were easily understood, worded so that they would produce accurate answers and were not too long to optimise response rates. The final questionnaire took less than 5 minutes to complete on average. The appendix contains a copy of the questionnaire used.

2. Survey administration

- Once the questionnaire was finalised, AWI programmed it into their Qualtrics platform for distribution. Pragmatic assisted in providing input to question/survey layout and formatting to ensure that it was easy to complete for respondents.
- Informal pilot testing of the survey was undertaken with AWI staff. The survey was translated into Korean, Japanese and Chinese for contacts in those countries.
- Under direction from relevant AWI staff the regional business development managers (BDMs) distributed the survey link to the approximately 550 s. 47G(1)(a) in 46 countries.
- The fieldwork commenced on April 20, 2023 and finished on May 19, 2023. During this time, BDMs sent reminders to those s. 47G(1)(a) who hadn't completed the survey, encouraging them to do so before the deadline.
- A total of 198 s. 47G(1)(a) completed all questions on the survey. This represents a response rate of around 40% which is exceptional for an online survey of this nature involving multiple countries and a diverse mix of stakeholders. Typically, many online surveys achieve a response rate of only around 10%-15%.

Final sample (n=198)

A country breakdown of the final sample is shown below. s. 47G(1)(a) from 27 different countries took part in the survey.

s. 47G(1)(a)

Total	198
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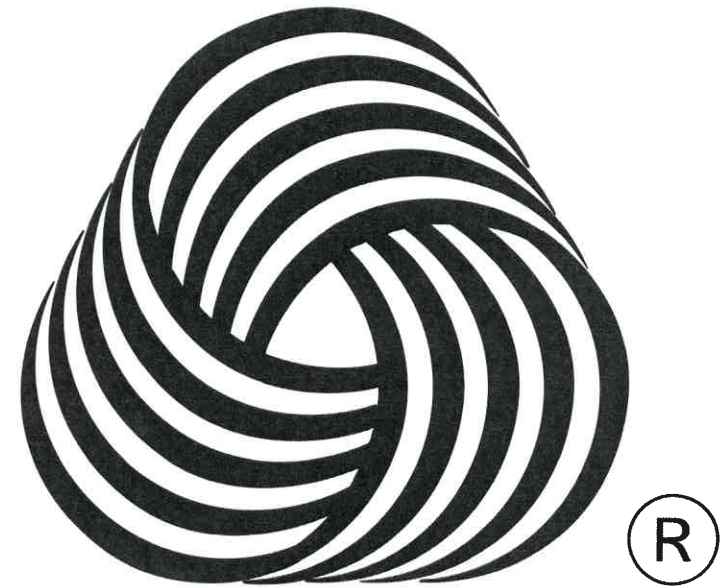
Regional analysis

Regional analysis

To deal with smaller sample sizes we have grouped some of countries into regions for our analysis

Country/region	No. of survey responses
s. 47G(1)(a)	s. 47G(1)(a)
Total	198

DETAILED
FINDINGS

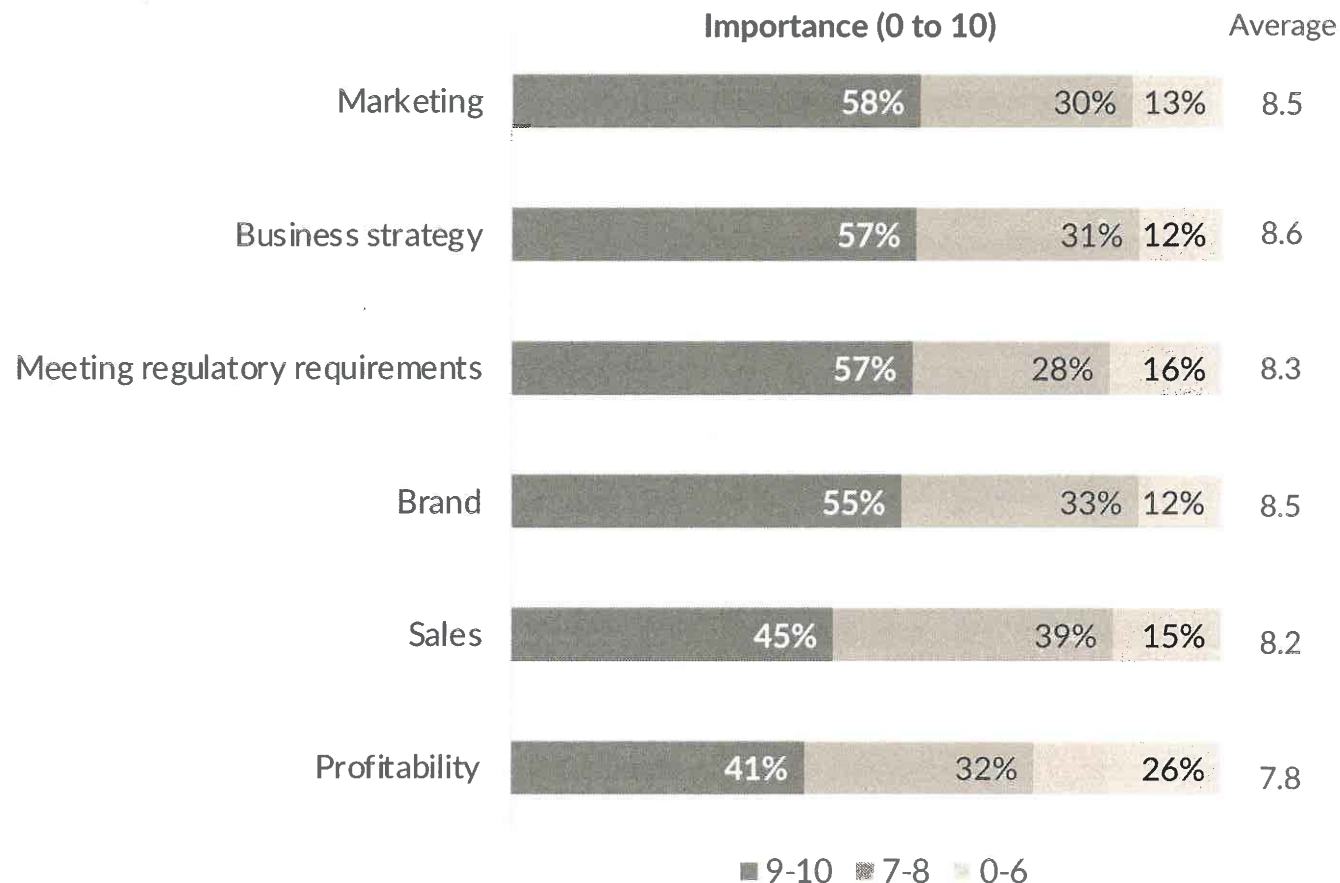


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The importance of environmental sustainability on business

The importance of environmental sustainability on business

How important is environmental sustainability when it comes to the following aspects of your business? On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important. (n=198)



Environmental sustainability was important to most aspects of the s. 47G(1)(a) businesses (all averaging between 7.8 and 8.6).

Marketing, business strategy and meeting regulatory requirements saw the most 9-10 ratings

The importance of environmental sustainability on business

How important is environmental sustainability when it comes to the following aspects of your business? On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important. (n=198). Top two countries/region with highest averages for each aspect have been highlighted.

Country/region	Marketing	Business strategy	Meeting reg. requirements	Brand	Sales	Profitability	No. of s. 47G(1)(a) responses
s. 47G(1)(a)	8.9	8.9	8.7	9.0	9.0	8.6	48
	8.4	8.4	7.6	8.2	7.7	7.6	33
	9.1	8.8	8.6	9.3	8.4	8.3	25
	7.0	7.5	7.6	7.2	6.9	6.9	21
	7.3	8.2	8.3	7.9	7.3	6.0	9
	9.0	9.7	8.8	8.4	8.8	8.6	9
	8.8	8.1	8.6	8.8	8.6	8.3	9
	8.6	8.9	8.6	8.9	8.0	7.5	8
	8.5	8.2	8.4	8.3	8.3	7.2	17
	8.5	9.0	8.1	7.5	7.9	7.0	8
	7.6	7.4	8.4	7.8	8.0	5.8	5
	8.7	8.7	9.7	8.7	8.0	8.3	3
	9.7	9.7	9.7	9.7	9.3	8.3	3
Average	8.5	8.6	8.3	8.5	8.2	7.8	198

*Not included in highlighting analysis due to small sample size

s. 47G(1)(a) saw environmental sustainability having important impacts on all of the aspects listed. Compared with other markets this was especially the case for meeting regulatory requirements (8.7), brand (9.0), sales (9.0) and profitability (8.6). There was a similar pattern for s. 47G(1)(a) (i.e. s. 47G(1)(a)).

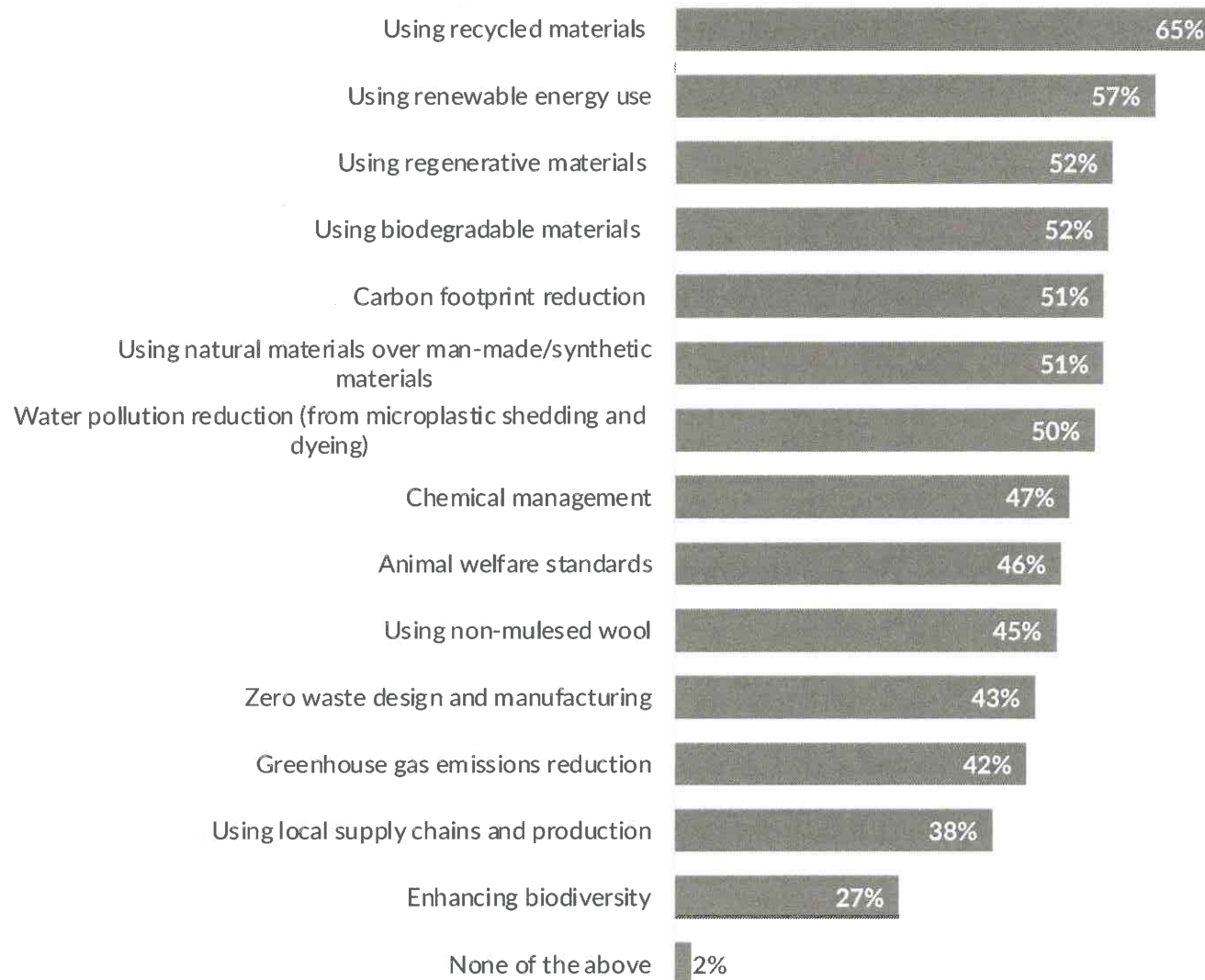
s. 47G(1)(a) responses were generally in line with the total sample, while s. 47G(1)(a) focussed on marketing (9.1) and brand (9.3).

On the whole, s. 47G(1)(a) and s. 47G(1)(a) respondents were relatively less likely to consider environmental sustainability important to the various aspects of their business.

Sustainability considerations

Sustainability considerations

Which of the following sustainability considerations are priorities for your business. Please select all that apply. (n=198)



Using recycled materials (65%) , renewable energy (57%), regenerative materials (52%) and biodegradable materials (52%) were the main priorities for ^{s. 47G(1)(a)}.

Comparatively, animal welfare standards (46%) and using non-mulesed wool (45%) were slightly less of a priority, although still a consideration for almost half the sample

Using local supply chains and production (38%) and enhancing biodiversity (27%) were the lowest sustainability priorities.

Sustainability considerations

Which of the following sustainability considerations are priorities for your business. Please select all that apply. (n=198) Top two countries/regions with highest percentages for each consideration have been highlighted.

Country/region	Using recycled materials	Using renewable energy use	Using regenerative materials	Using biodegradable materials	Carbon footprint reduction	Using natural materials over synthetic	Water pollution reduction	Chemical management	Animal welfare standards	Using non-mulesed wool	Zero waste design and manufacturing	Greenhouse gas emissions reduction	Using local supply chains and production	Enhancing biodiversity	s. 47G(1)(a) No. of responses
s. 47G(1)(a)	38%	69%	58%	67%	58%	52%	60%	48%	29%	29%	33%	44%	38%	35%	48
	61%	27%	55%	27%	21%	36%	21%	36%	27%	36%	18%	30%	27%	9%	33
	68%	76%	44%	80%	64%	56%	72%	48%	52%	56%	56%	52%	32%	32%	25
	76%	57%	29%	33%	38%	33%	43%	71%	71%	62%	38%	33%	33%	19%	21
	67%	33%	67%	67%	44%	67%	33%	33%	56%	33%	44%	22%	44%	22%	9
	100%	89%	33%	33%	78%	22%	56%	44%	33%	33%	67%	56%	33%	11%	9
	78%	44%	44%	11%	78%	33%	56%	33%	33%	33%	78%	44%	44%	33%	9
	75%	75%	63%	63%	75%	75%	50%	63%	100%	100%	38%	75%	38%	38%	8
	76%	41%	47%	59%	47%	88%	47%	41%	53%	71%	47%	53%	59%	18%	17
	88%	75%	50%	63%	75%	63%	63%	63%	88%	63%	75%	38%	63%	38%	8
	80%	20%	100%	40%	0%	40%	60%	20%	40%	20%	60%	0%	40%	20%	5
	67%	100%	67%	33%	67%	67%	67%	33%	67%	0%	33%	67%	33%	100%	3
Total	100%	67%	100%	33%	67%	67%	33%	67%	33%	67%	100%	33%	33%	67%	3
	65%	57%	52%	52%	51%	51%	50%	47%	46%	45%	43%	42%	38%	27%	198

*Not included in highlighting analysis due to small sample size

The priority of various sustainability considerations also varied across markets. s. 47G(1)(a) respondents were more likely to place a priority on recycled materials (100%), renewable energy (89%) and carbon footprint reduction (78%).

s. 47G(1)(a) s. 47G(1)(a) were more likely to be focussed on renewable energy (76%) and using biodegradable materials (80%), along with water pollution reduction (72%). The pattern was similar for s. 47G(1)(a) s. 47G(1)(a) also placed the lowest priority on animal welfare standards and the use of non-mulesed wool (both 29%). While for s. 47G(1)(a) these considerations were much higher priorities (100% of s. 47G(1)(a) s. 47G(1)(a) considered animal welfare and non-mulesed wool priorities).

s. 47G(1)(a) s. 47G(1)(a) stood out with their focus on chemical management (71%), while s. 47G(1)(a) were more likely to place a priority on using regenerative and biodegradable materials (both 67%).

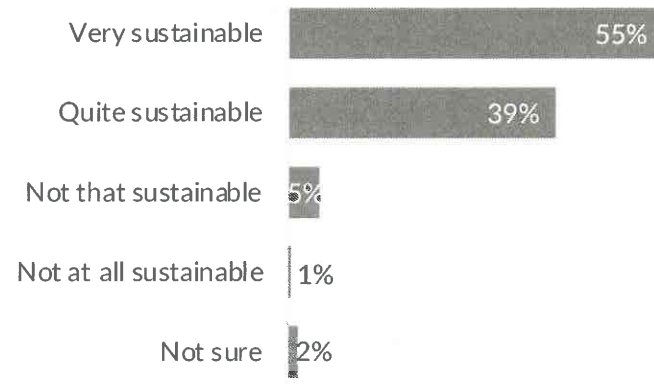
Wool as a sustainable fibre

s. 47G(1)(a) considered animal welfare and non-mulesed wool priorities).

LEX s. 47G(1)(a) s. 47G(1)(a) stood out with their focus on chemical management (71%), while s. 47G(1)(a) were more likely to place a priority on using regenerative and biodegradable materials (both 67%).

Wool as a sustainable fibre

As a fibre, how sustainable is wool? (n=198) Top two countries/regions with highest percentages for 'very sustainable' and 'quite sustainable' have been highlighted.



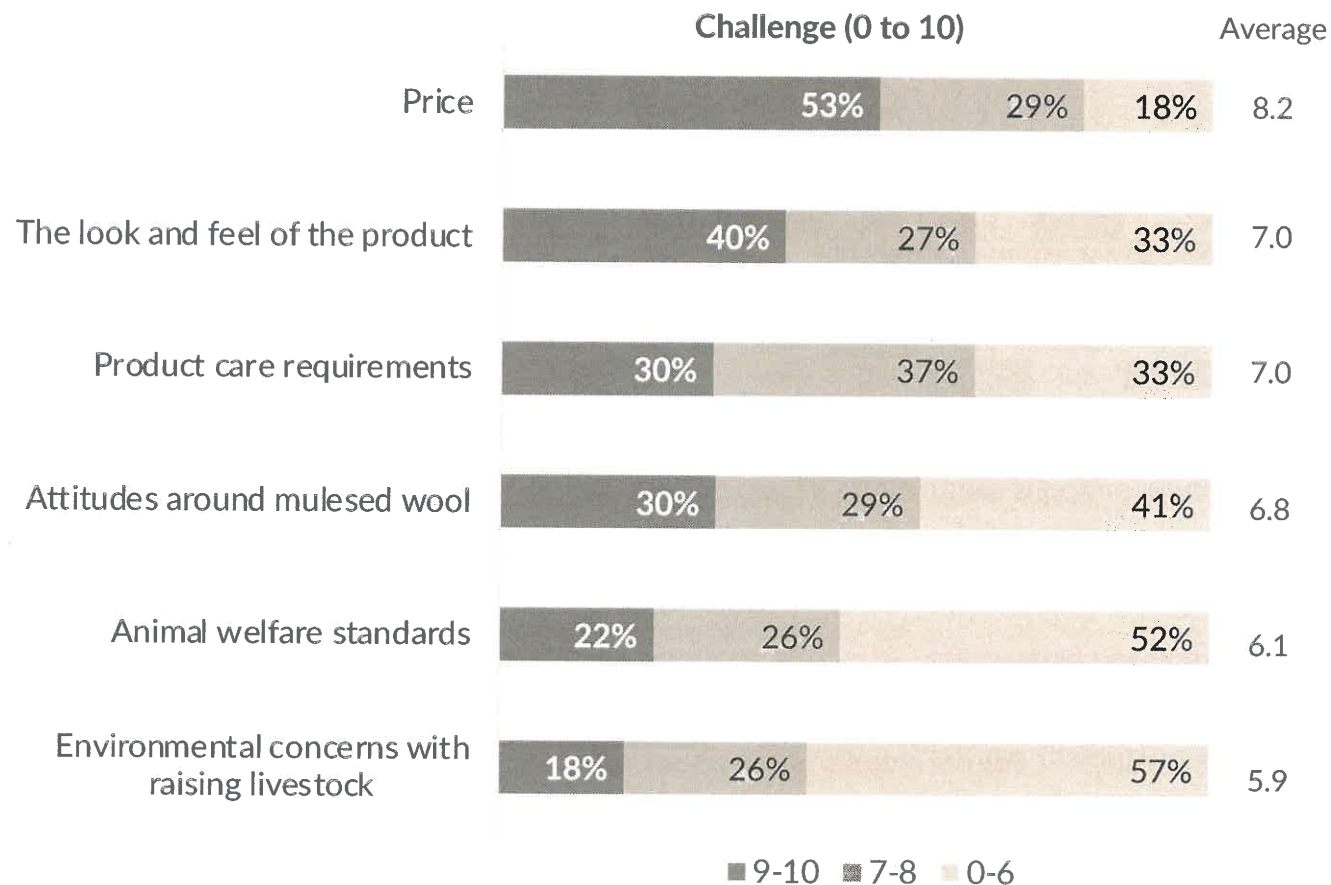
For the majority of s. 47G(1)(a) respondents, wool was seen as a 'very sustainable' fibre (55%). Just over a third (39%) also considered wool 'quite sustainable'. Only 6% questioned the sustainability of wool.

Views on wool's sustainability were strongest in s. 47G(1)(a) (82% 'very sustainable'), s. 47G(1)(a) and s. 47G(1)(a) (both 67%). This sentiment was more subdued in s. 47G(1)(a) (28% 'very sustainable') and s. 47G(1)(a) (33%).

Country/region	Very sustainable	Quite sustainable	Not that sustainable	Not at all sustainable	Not sure	No. of s. 47G(1)(a) responses
s. 47G(1)(a)	54%	35%	8%	-	2%	48
	42%	52%	3%	3%	-	33
	60%	32%	8%	-	-	25
	38%	52%	10%	-	-	21
	67%	33%	-	-	-	9
	67%	22%	-	-	11%	9
	33%	56%	-	-	11%	9
	63%	38%	-	-	-	8
	82%	18%	-	-	-	17
	38%	63%	-	-	-	8
	40%	60%	-	-	-	5
	100%	0%	-	-	-	3
	100%	0%	-	-	-	3
Total	55%	39%	5%	1%	2%	198

Challenges selling wool to customers

How much of a challenge are each of the following when selling wool products to customers? On a scale of 0 to 10, where 0 no challenge at all and 10 is a major challenge. (n=198)



Price (8.2) and product look, feel and care requirements (7.0) were the main challenges for selling wool products.

Attitudes around mulesed wool (6.8) and animal welfare standards (6.1) are relatively lower-level concerns.

Challenges selling wool to customers

How much of a challenge are each of the following when selling wool products to customers? On a scale of 0 to 10, where 0 no challenge at all and 10 is a major challenge. (n=198) Top two countries/regions with highest averages for each challenge have been highlighted.

Country/region	Price	The look and feel of the product	Product care requirements	Attitudes around mulesed wool	Animal welfare standards	Environmental concerns with raising livestock	No. of s. 47G(1)(a)
s. 47G(1)(a)	8.5	7.9	7.8	6.9	6.5	6.8	48
	8.6	8.1	7.6	7.7	6.3	6.4	33
	8.3	5.6	7.0	6.0	5.1	5.0	25
	7.8	6.8	5.8	7.0	6.6	5.7	21
	6.4	4.9	4.3	5.8	5.3	2.8	9
	8.9	7.1	7.8	7.2	5.2	6.4	9
	7.6	6.7	6.7	5.9	6.8	7.2	9
	8.3	6.8	7.4	7.2	6.5	6.1	8
	8.1	4.5	6.0	8.1	6.3	5.0	17
	7.6	7.3	5.9	6.0	6.3	5.5	8
	8.0	8.0	6.6	4.4	4.6	4.2	5
	6.3	6.0	6.7	4.7	4.7	4.3	3
	8.0	7.7	8.3	8.3	8.3	7.7	3
Average	8.2	7.0	7.0	6.8	6.1	5.9	198

*Not included in highlighting analysis due to small sample size

s. 47G(1)(a)s. 47G(1)(a) were the most likely to find product care requirements the biggest challenge when selling wool to customers (7.8). In s. 47G(1)(a) price (8.1), look and feel (8.1) and attitudes around mulesed wool (7.7) were the biggest challenges. Consistent with other results, attitudes to mulesed wool were also considered a challenge by some of the s. 47G(1)(a)s. 47G(1)(a) (8.1). Animal welfare standards were more likely to be seen as a challenge for those in s. 47G(1)(a) (6.6) and s. 47G(1)(a) (6.8).

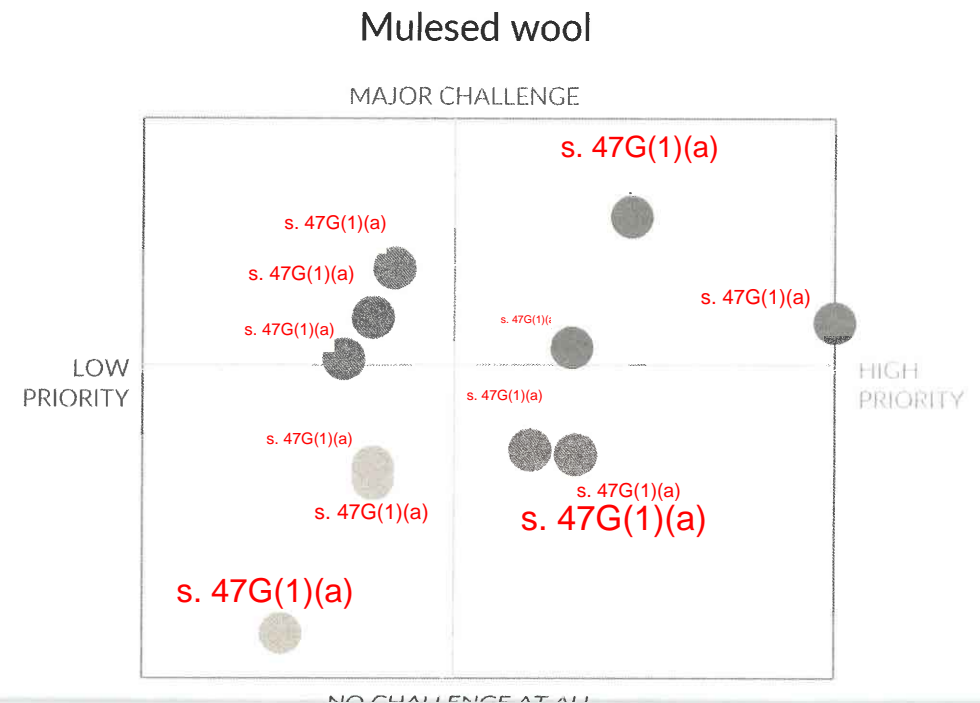
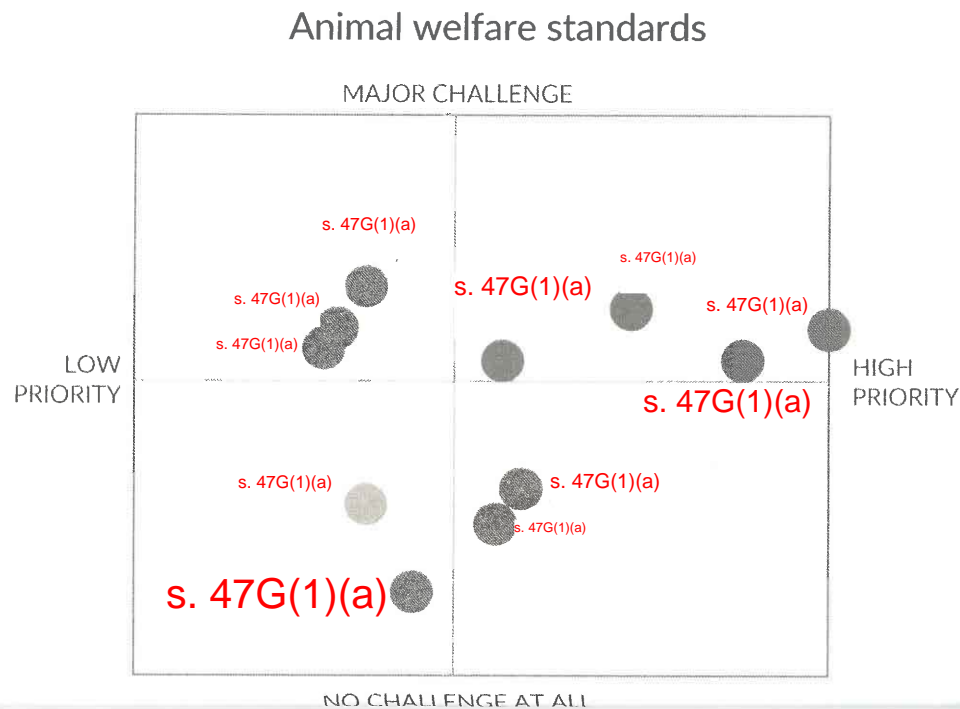
By contrast, s. 47G(1)(a)s. 47G(1)(a) were less likely to nominate different challenges compared with other markets.

Animal welfare and mulesed wool: priorities and challenges

The charts below plot the degree to which animal welfare standards and the use of mulesed wool are sustainability priorities for **s. 47G(1)(a)** and how much a challenge each are when it comes to selling wool to customers.

The results further emphasise the diversity of views of different markets around these two issues, while also confirming that they remain the most pertinent for **s. 47G(1)(a)** (especially in **s. 47G(1)(a)**) – seen in the top right quadrant where priority and challenge scores are both high. This reflects the well-established animal rights movements in these countries as well as specific protests around mulesing over the years.

By contrast, most **s. 47G(1)(a)** markets (and **s. 47G(1)(a)**) were generally less concerned by the impact of animal welfare standards and the use of mulesed wool on their businesses.



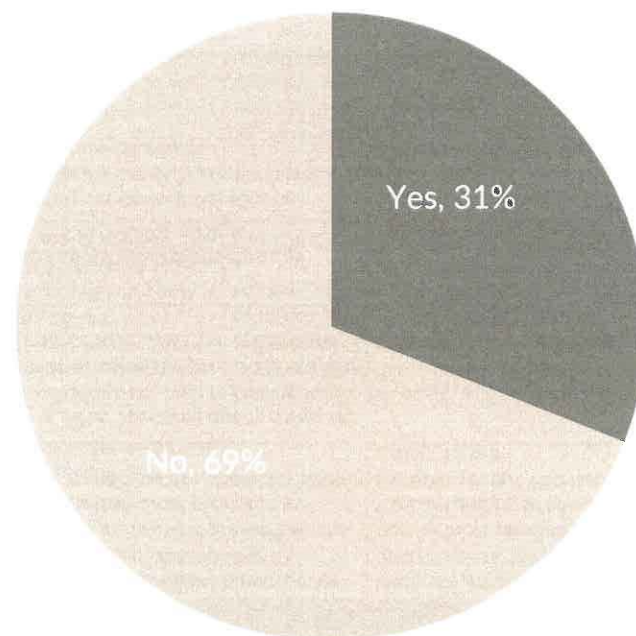
Other challenges

NO CHALLENGE AT ALL

NO CHALLENGE AT ALL

Other challenges

Are there any other challenges you face when selling wool products to customers? (n=198)



Around one third of s. 47G(1)(a) (31%) surveyed reported other challenges facing their businesses.

Their verbatim responses are shown on the following pages

Other challenges

What are these challenges? (n=61) Verbatim comments from the 31% who claimed other challenges, noting that many of the comments reflected the themes of the previous question

s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)
s. 47G(1)(a) being a tropical country people prefer non wool however we continue to educate on the temp regulating properties but it's mindset which is herculean task - Young consumers are well aware of sustainability but are price conscious thus wool products are expensive and moreover we look for some new age characteristics in wool which are cost effective.	With the improvement of the quality of life, consumers' choices will also progress, they will choose environmentally friendly and comfortable products, and the traceability of wool is not deep enough for consumers, to allow consumers to have a better consumer experience, but also need to popularize the introduction of the product itself	1. Lack of high-value-added wool technology products corresponding to low prices 2. Development of wool performance that can be extended to areas other than apparel
The only challenge we face is pilling. After spending good money on wool products the customer's expectations are high regarding its sustainability and looks. And when after using the product the pilling appears, it becomes very difficult for us to console the retailer and ultimately the consumer.	Strengthen the sustainable promotion of wool, easy care and machine washing, etc	Specification and control of raw material quality, and difficulties in finding responsible suppliers of origin
Major challenge is about awareness about wool products as all season material, consumer still feels it is only for winter..	Sustainable and responsible	Price problem, lack of understanding of wool material by consumers (they only know wool material as a winter material)
Economy of scale as compared to other manufactures (s. 47G(1)(a)) s. 47G(1)(a)s. 47G(1)(a) Price of Wool Free trade agreements among members are also trade barrier as compared to non-members.	Not enough knowledge of wool products	Common preoccupation of wool is used in winter. Lack of awareness of the excellent function of moisture control lights in summer
Educating about wool products in s. 47G(1)(a)	Costs are rising, but selling prices are lower than before	Lack of awareness, preconceived notions, high price compared to other textile materials, and low level of dyeing/processing technology
Customer confidence on spending for high values products	High cost	The selling price of wool products is high, and the cost and effort of wool product management (dry cleaning) are incurred
Reducing usage of wool due to higher costs	Carbon footprint, energy management	Increased raw material prices
Softness, awareness about wool	Easy care of wool products + hairball problem	It is difficult to manufacture eco-friendly laundry wool products.
Still customers are feeling that wool is not suitable for tropical countries. This is myth and you all have to work to remove this myth.	Pilling aspects of wool products	Difficulty finding quality wool
Yes, Price wise	Pricing is always the biggest challenge when selling wool products to clients.	Difficulty in price control (dry) production air
Price	Price, quality, brand	
Price	The price is high	
Price of the wool compared to other fibre		
Price, Feel of the fabric		

Other challenges (cont.)

Yes, Price wise	clients.	Difficulty in price control (dry) production air
Price	Price, quality, brand	
LEX 30942 - IR 30524	The price is high	Page 34 of 38
Price of the wool compared to other fibre		
Price, Feel of the fabric		

Other challenges (cont.)

What are these challenges? (n=61) Verbatim comments from the 31% who claimed other challenges, noting that many of the comments reflected the themes of the previous question

s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)
Customers want to be reassured about virgin wool, CITES, made-in people is claiming they do not know merino wool; they are convinced merino wool is hot	Basically, price is our biggest challenge as we are s. 47G(1)(a) made from sheepskin	Availability of constant quality, different customer requirements in regards of farm, shipment, certifying information,	1. It can feel scratchy/irritating when worn, compared to synthetic fibres. 2. Aftercare, careful/separate washing and drying flat/with care. 3. Aftercare, requires effort. de-pilling.	The Higg Index as a negative rating scale for the wool, is used by many brands as an evaluation measure for the material. Superwash Standard with its high AOX values is very negative rated by many customers. Chlorine-free treatments of the wool, however, must be declared by us.	Oeko-Tex certificate Ethical business behaviour
Recycled and RWS quality, European artwork	Full farm traceability	Resistency - long lasting fabric	Obtaining RWS yarn in a reasonable lead time at a realistic price		
Traceability along the entire value chain (until farm)	Meeting customer price points for high end (low micron) merino wool sweaters manufacturing cut and sew tee shirts in 100% merino wool	What is a fair and correct GHG footprint for wool specifically to the origin place? No common data base available. Man-made fibre is better prepared and has better Higg Index.			
	The price of the wool and manufacturing costs.				

s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)	s. 47G(1)(a)
Performance related such as pilling Colour change for sensitive shades if Machine Wash Price which is considered high vs Cotton & other man made fibres Hand feel on mid coarse micron wool	People tend to believe wool is to warm in summer. To inform that wool is not as durable as some other fibres and need to be taken care of in the right way.	The actual quality superiority of wool fibres has not yet penetrated the apparel industry. We believe this is the perfect opportunity for the sustainable hustle and bustle to mainstream wool fibres to the point where polyester and acrylic fibres are relegated to the margins.	1) Lead time 2) Wool Yarn Price 3) Wool Yarn Sourcing 4) Transportation time	Prices and Customer awareness, also Wool product need to elevate according to current market change	Some of our customers might have itchy when wearing wool. Maintaining wool products during humid season of tropical weather is also challenging, have to face with cloth moth larvae or other insects.

APPENDIX

Survey questionnaire

s. 47G(1)(a) survey

Thank you for agreeing to take part in this brief survey about how environmental sustainability issues effect your business and customers.

It should take less than 5 minutes to complete and all your answers will remain confidential.

We have commissioned an independent research agency, Pragmatic Research, to conduct the survey. If you have problems completing the survey, feel free to contact s. 47F(1) at ^{s. 47F(1)}@pragmaticresearch.com.au who can answer any questions you may have.

Terms and Conditions

I understand and agree that the answers to my submission may be made publicly available as part of the aggregated survey results, but that my personal information, as well as the identity, details and any identifying information of my brand, will be kept confidential and non-identifiable.

[] Tick box

CONTINUE TO SURVEY (link)

First, some brief details about your company

1. Company name
2. Country

(Note: this information will not be identifiable in the aggregated survey results)

3. How important is **environmental sustainability** when it comes to the following aspects of your business? On a scale of 0 to 10, where 0 is not at all important and 10 is extremely important

Importance of environmental sustainability on....	Not at all important											Extremely important
	0	1	2	3	4	5	6	7	8	9	10	
Business strategy												
Marketing												
Brand												
Sales												
Meeting regulatory requirements												
Profitability												

4. Which of the following sustainability considerations are priorities for your business Please select all that apply. RANDOMISE LIST

Animal welfare standards	
Using biodegradable materials	
Enhancing biodiversity	
Carbon footprint reduction	
Chemical management	
Greenhouse gas emissions reduction	
Using local supply chains and production	
Using non-mulesed wool	
Using natural materials over man-made/synthetic materials	
Using recycled materials	
Using regenerative materials	
Using renewable energy use	
Water pollution reduction (from microplastic shedding and dyeing)	
Zero waste design and manufacturing	

Commercial in confidence

2

5. As a fibre, how sustainable is wool? Select one

Very sustainable	<input type="checkbox"/>
Quite sustainable	<input type="checkbox"/>
Not that sustainable	<input type="checkbox"/>
Not at all sustainable	<input type="checkbox"/>
Not sure	<input type="checkbox"/>

6. How much of a challenge are each of the following when selling wool products to customers? On a scale of 0 to 10, where 0 no challenge at all and 10 is a major challenge

	Not challenge at all										A major challenge
	0	1	2	3	4	5	6	7	8	9	10
Animal welfare standards											
Product care requirements											
Environmental concerns with raising livestock											
The look and feel of the product											
Attitudes around mulesed wool											
Price											

7. Are there any other challenges you face when selling wool products to customers?

- a. Yes
- b. No

8. IF YES, what are these challenges? OPEN ENDED QUESTION

Thank you for your participation

Commercial in confidence

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