

INVESTOR BRIEFING NO. 24

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How Are Companies Using the Business Benchmark on Farm Animal Welfare?

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Introduction

The Business Benchmark on Farm Animal Welfare (BBFAW) has published four Benchmarks (for 2012, 2013, 2014 and 2015), with the 2016 Benchmark scheduled to be published in late January 2017. Following the launch of the fourth Benchmark in February 2016, we surveyed the companies covered by the Benchmark to understand the factors that have influenced their approach to farm animal welfare, and to gather their views on how the Business Benchmark might be made more useful to them¹. We also held face-to-face meetings with approximately 20 companies and participated in a number of conferences and other events in 2016. This briefing summarises the quantitative and qualitative feedback received from companies through this engagement.

Our Survey of Company Opinion

In May and June 2016, we conducted an electronic survey (a copy of the survey is provided in Attachment 1) of the 90 companies covered by the 2015 Benchmark. In total, we received responses from 21 companies (representing 23% of the sample) across eight countries². Specifically, we received email responses from: six food retailers and wholesalers (Coop Group (Switzerland), Delhaize, Groupe Casino, Loblaws, Marks & Spencer, Woolworths (Australia)), five food producers and processors (Cargill, Cranswick, Groupe Danone, Noble Foods and Terrena Group), and three restaurants and bars (Elior, Darden Restaurants and Greggs). In addition, the following companies provided feedback on the usefulness of the Benchmark in face-to-face meetings: Barilla (Italy), Coop (UK), Groupe Danone, Migros (Switzerland), Nestlé (Switzerland), Tyson Foods (US) and Whitbread (UK).

¹ This is the fourth time we have surveyed companies. We have conducted similar surveys of investors in 2013, 2014 and 2015. See the Business Benchmark on Farm Animal Welfare website, <http://www.bbfaw.com/publications>

² Company responses were received from Australia, Belgium, Canada, France, Italy, Switzerland, the UK and the USA.

Key Findings

1. Farm Animal Welfare is Moving Up the Corporate Agenda

A key finding from the survey is that companies are paying greater attention to farm animal welfare, with 95% of companies stating that they had developed their farm animal welfare approach in the past two years. For many, this work has formed an integral part of their sustainability strategies and their ongoing commitment to continuous improvement.

Examples of the actions that have been taken include:

- A US-based producer has published multiple animal welfare-related objectives and targets. These include a commitment to phase out the use of gestation crates in company-owned sows managed by third-party suppliers by 2017 and to work with all suppliers to eliminate gestation crates across its supply chain; to reduce or eliminate antibiotics for certain specified species; and to only construct cage-free facilities for laying hens. It is also working on other initiatives linked to disease prevention that do not require the use of antibiotics, and the elimination of routine mutilations.
- A European retailer has focused on improving its reporting on its animal welfare performance. It now reports annually on the proportion of cage-free eggs in its supply chain; the proportion of poultry not subjected to beak trimming, the proportion of pigs and cattle not subjected to tail docking and of pigs not subjected to teeth clipping; the proportion of species subjected to pre-slaughter stunning; and the proportion of animals transported in eight hours or less).
- A UK-based food producer has committed to reducing the quantity of antibiotics used for prophylactic purposes across its supply chain. Since 2009, the company has achieved an almost 50% reduction in antibiotic usage by volume in its main European suppliers, accounting for over 74% of its international product purchased.
- A food service company has committed to purchasing cage-free whole and liquid egg products by 2018, and to purchasing all pork products from gestation crate-free sows by 2025.
- A European food producer has published an Animal Welfare Position Paper describing its commitments to farm animal welfare. Alongside this, the company has published a Dairy Animal Welfare Guide to increase awareness among its dairy farmers and provide them with guidelines to encourage best practice.

2. Customer and Client Demand are the Most Important Influences on Company Approaches to Farm Animal Welfare

Customer and client demand continues to be the strongest driver for corporate action on farm animal welfare, with 78% of companies identifying this as an important influence on their approach. This is closely followed by the influence of BBFAW (both the benchmarking process itself and the dialogue with BBFAW Secretariat, cited by 76% of companies). Other influences include peer pressure, NGOs and the media (identified by 57%, 57% and 50% of companies respectively). There were two particularly interesting findings in the 2016 survey. The first relates to the emergence of investor pressure as an important influence on company behaviour (identified by 29% of companies); this is the first time that a substantial number of companies have identified investors as an important influence on their approach. The second relates to regulatory pressure, which was identified by just 21% of companies, with the majority of these companies being European-based, reflecting the regional nuances of regulatory drivers for farm animal welfare. Other factors identified as influencing company practices were pressures from within companies to improve their brands and reputation, and to strengthen their internal standards and processes; and the development of companies' responsible sourcing strategies.

One company reported that it was re-appraising its focus on higher animal welfare due to difficult trading conditions, including competitive pricing pressures, consumer demand for basic rather than premium value products, and conflicts between resource efficiency and animal welfare, citing (in the case of broiler chickens) the price of feed used in organic farming systems being significantly higher than that used in conventional farming systems.

3. The Benchmark is Influencing Company Approaches to Farm Animal Welfare

As part of our company engagement, we asked companies to tell us how exactly the Benchmark had influenced their approach to farm animal welfare. Of the 21 companies who provided feedback, 85% of companies (compared to 68% in 2015) indicated that the Benchmark had played some role. The respondents identified five main mechanisms of influence (see Figure 1):

- The Benchmark enables companies to benchmark themselves against their industry peers.
- The Benchmark helps companies to improve their farm animal welfare reporting (primarily) and management.
- The Benchmark helps to attract senior management attention to farm animal welfare
- The Benchmark provides companies with a clear set of expectations.
- The Benchmark helps to raise the profile of companies on their farm animal welfare approaches.

Figure 1: How is the Business Benchmark Influencing Company Approaches to Farm Animal Welfare?



A number of companies provided some additional comments on the usefulness of the Benchmark to them. These appear below:

Selected quotes from companies on the usefulness of the Benchmark:

“As a result of the BBFAW, we are now working much closer with our suppliers to understand their approach to farm animal welfare. We understand our supply chain from a farm welfare perspective much better since the advent of the BBFAW.”

“We care deeply about the welfare of the livestock in our supply base. We are completely committed to driving industry-leading standards in animal welfare and welcome the role that the BBFAW benchmark provides in being a catalyst for change across the global food industry.”

“We have used the benchmark as a guide when developing our animal welfare principle document.”

“We commend the BBFAW’s genuine interest in understanding how to productively support such an important area of food sustainability.”

“We have not yet found the right structure and approach to coordinate animal welfare policies and practices at the global level under a single robust policy. We realise this is a challenge for investors and external stakeholders trying to assess animal welfare globally. [However,] BBFAW’s benchmark and report as well as the guidance we received from CIWF [Compassion in World Farming] in the past are great input to inform those discussions.”

"The Business Benchmark provides a practical and respected framework, against which we can assess our progress and identify areas for improvement."

"We followed the recommendation of the BBFAW and published our Animal Welfare Guide on our website."

"We share consumers' concerns about farm animal welfare and appreciate that our new animal welfare commitments for dairy and eggs have been recognized in the latest BBFAW assessment."

"This benchmark is very interesting for us but at the moment the way it is designed is too complex to answer. It would be helpful to have a French version of the document."

Using the Benchmark to Engage Customers and Consumers

Companies are using their performance in the Benchmark as tangible evidence of their commitment to farm animal welfare. Of the 90 companies covered by the 2015 Benchmark, 19 reported on their performance in the Business Benchmark on Farm Animal Welfare in their corporate communications – either on their websites, in their annual reports and sustainability reports, or in media releases.

Table 1: List of companies³ making specific references to the BBFAW in their corporate communications:

BBFAW Company	Web Link
Barilla	http://www.barillagroup.com/en/search/node/BBFAW
BRF	https://www.brf-global.com/brasil/en/brfs-animal-welfare-practices-receive-international-recognition
	https://www.brf-global.com/brasil/en/brfs-animal-welfare-practices-receive-international-recognition / https://www.brf-global.com/europe/corporate-responsibility/animal-welfare
Coop (Switzerland)	http://www.coop.ch/pb/site/common/get/documents/coop_main/elements/ueber/geschaef-tsbericht/2016/_pdf/COOP_NHB_2015_e_low.pdf /
	http://www.coop.ch/pb/site/medien/node/83292358/Lde/index.html
Coop (UK)	http://www.co-operative.coop/search-results/?q=BBFAW
Cranwick	https://cranwick.plc.uk/news/cranwick-lead-way-animal-welfare-standards-across-pork-producers /
	https://cranwick.plc.uk/sites/default/files/Cranwick%20plc%20Annual%20Report%202016.pdf

³ Not all of the companies listed in Table 1 participated in the 2016 BBFAW Company Survey.

Greggs	https://corporate.greggs.co.uk/press-releases/greggs-achieves-tier-3-rating-in-the-2015-bbfaw-report
	https://corporate.greggs.co.uk/social-responsibility/responsible-sourcing/animal-welfare/
	https://corporate.greggs.co.uk/sites/default/files/GREGGS_23781_AR_2015_web.pdf
J Sainsbury's	http://www.j-sainsbury.co.uk/media/3169495/sainsburys_ar_2016_2005.pdf
JBS	http://relatorioanual.ibs.com.br/en/2015/2015_JBS_RAS_english.pdf
Marfrig	http://www.marfrig.com.br/en/marfrig-global-foods/recognition
	http://www.marfrig.com.br/en/documentos?id=739
	http://www.marfrig.com.br/en/documentos?id=761
	http://www.globalri.com.br/marfrig/2015/en/#intangibles
	http://www.globalri.com.br/marfrig/2015/en/#message_ca
Marks & Spencer	https://corporate.marksandspencer.com/blog/stories/mands_leads_in_global_animal_welfare_benchmark
	http://corporate.marksandspencer.com/plan-a/our-approach/food-and-household/product-standards/farm-animal-health-and-welfare
	http://corporate.marksandspencer.com/investors/89db73e54804477bb1e2b52e09306e43
McDonald's	http://corporate.mcdonalds.com/mcd/sustainability/sourcing/animal-health-and-welfare/legacy-of-commitment.html
Migros	https://generation-m.migros.ch/dam/jcr:83f78ff4-5866-48c9-9d37-e2802c6b6c2a/Fachdokumentation%20Tierwohl%20Juli16.pdf
Nestlé	http://www.nestle.com/csv/rural-development/responsible-sourcing/responsible-sourcing/animal-welfare
Noble Foods	https://www.noblefoods.co.uk/corporate-social-responsibility/
Premier Foods	http://www.premierfoods.co.uk/media/news-features/Items/We-move-up-in-the-Business-Benchmark-for-Animal-We
	http://www.premierfoods.co.uk/getattachment/337d6be6-dab0-46e5-bf57-ac2b17b4c223/Premier-Foods-Annual-Report-2015-16.aspx
Unilever	https://www.unilever.com/sustainable-living/what-matters-to-you/farm-animal-welfare.html
Vion Food Group	http://www.vionfoodgroup.com/index.php?id=1592&tx_maxnews_pi2[action]=show&tx_maxnews_pi2[controller]=Post&tx_maxnews_pi2[post]=766&cHash=7d4ed0758fb02bd6c6cfb03527872d805e
John Lewis Partnership/ Waitrose	http://www.johnlewispartnership.co.uk/csr/sourcing-responsibly/animal-welfare.html
	http://content.yudu.com/web/6chp/0A3m5v2/reportsaccounts2016/flash/resources/index.htm?refUrl=http%253A%252F%252Fwww.johnlewispartnership.co.uk%252Ffinancials%252Ffinancial-reports%252Fannual-reports.html
	http://www.waitrose.com/home/inspiration/about_waitrose/the_waitrose_way/waitrose_animal_welfarecommitments.html
Whitbread	http://www.whitbread.co.uk/content/dam/whitbread/pdfs/corporate-responsibility/reports-presentations/Whitbread%20Corporate%20Responsibility%20Report%202015_16.pdf

Some Comments from BBFAW

In response to previous company feedback on how the Benchmark could be made more useful to companies, we have made a series of changes. We have consulted companies on the development of performance-based criteria. We have introduced a one-year grace period, whereby we have scored companies on performance reporting questions (included in the 2014 Benchmark criteria for the first time) and on performance impact questions (included in 2016 for the first time), to allow companies to become familiar with our criteria and to adapt or develop their internal processes to work towards meeting these criteria.

On the company reports that the BBFAW produces, we have responded to company interest in understanding their scoring relative to industry peers. As such, we have introduced, alongside year-on-year scores for each company, graphs showing their overall scores in relation to industry sub-sector peers, and their scores by theme (e.g. Management Commitment and Policy, Governance and Management Approach, Innovation and Leadership, and Performance Reporting) relative to their industry peers.

Suggestions for Strengthening the Benchmark

In the course of our company engagement during 2016, we received a number of comments on how the Benchmark might be strengthened. We set out these comments here and provide some initial responses in italics:

- Why is there not more direct engagement between BBFAW and the companies covered by the Benchmark, for example, through face-to-face briefings and debriefs?
 - **BBFAW Comment:** *Most of the companies that made this comment are in the first or second years of being covered by the Benchmark. While we do notify companies in writing ahead of their inclusion in the Benchmark, it sometimes comes as a surprise to companies when they receive their first assessments, in particular, when the assessment is lower than they would expect. In our experience, it typically takes a company two to three Benchmark cycles to fully understand the Benchmark and then to embrace it as a helpful management tool in a) attracting senior management attention, b) in evolving company reporting practices on farm animal welfare, and c) in helping companies to identify and develop areas for improvement in their management of farm animal welfare. This comment, however, points to the importance of us, and our investor supporters, continuing to raise the profile of BBFAW and of animal welfare more generally in the business community. The BBFAW Secretariat is very happy to engage with companies and help them understand the Benchmark and the business and investment case for farm animal welfare.*

We find that we have extensive and increasing dialogue with companies covered by the BBFAW, with 37 companies responding to their 2016 preliminary evaluations, 27 companies responding to our 2016 company survey and our 2016 public consultation and around 30 face-to-face meetings and conference calls with the BBFAW. An increasing number of companies are realising the benefit of engaging with the BBFAW. Typically, companies engage with the BBFAW to develop their understanding of the Benchmark evaluation criteria and scoring methodology, to gain insight into best practices in other Benchmark companies, and in managing internal and external stakeholder dialogue on companies' individual performance on farm animal welfare. The BBFAW welcomes this interest from companies and is keen to develop and maintain relationships with all BBFAW companies, including companies that are new to the Benchmark.

- Since only public information is used, is there a risk of a positive bias toward larger companies with more resources to report and, therefore, score better?
 - **BBFAW Comment:** *Interestingly, a similar question was asked by investors in our 2016 engagement. Given that the Benchmark focuses on 90 of the largest global food companies, our view is that all these companies should have the capacity and resources needed to manage farm animal welfare effectively and to report in a credible manner. We acknowledge that smaller companies would face more challenges. However, given that the Benchmark has been designed to align with standard management practices and common client reporting requirements, we do not see company size as a particularly important determinant of company scores.*
- The BBFAW does not engage with companies in gathering the data to check if the detail provided by companies and the BBFAW's interpretation of this detail is correct. Critically, it is not always applicable to have all the elements on a company website.
 - **BBFAW Comment:** *A key objective of the BBFAW is to evaluate companies on the quality of their disclosure on farm animal welfare. Investors, customers, consumers and other stakeholders expect food companies to acknowledge farm animal welfare as an important business issue. By reviewing company websites and reports every year, the BBFAW can gauge the extent to which companies are integrating farm animal welfare in their business processes and how they are accounting for their performance on farm animal welfare.*

The BBFAW employs skilled assessors to conduct a thorough evaluation of each company's website and other published material, and it engages each company in reviewing its preliminary evaluation reports to ensure that the BBFAW assessors have not overlooked relevant information publicly available at the time of the evaluation or that the assessors have misinterpreted information provided by companies. We believe that the BBFAW's evaluation approach provides a level playing field for companies

to be evaluated on the quality of their reporting and their overall management of farm animal welfare.

We accept that some companies may choose not to publish details of their management approach or their performance on farm animal welfare. However, we see that companies are becoming more confident about disclosing such detail in their quest to engage important stakeholders such as investor and consumers on issues that are of key concern.

- The BBFAW compares companies across all geographies, even though the regulatory requirements on farm animal welfare, vary significantly from one region to another. Does this not unfairly bias companies in regions where there is a requirement to comply with stricter animal welfare standards? Why does the BBFAW not limit its comparison of company performance within the same country or even region?
 - **BBFAW Comment:** *Company requirements to comply with animal welfare regulations do vary significantly from one region to another. However, there are two reasons for us not to limit the benchmarking of companies to single territories.*

The first reason is that the BBFAW evaluates companies at a global level, accepting that there will be nuances in regulatory requirements across different geographies. We are interested to understand the extent to which companies implement consistent standards of farm animal welfare across all jurisdictions.

The second reason is that the BBFAW criteria extend beyond minimum regulatory requirements. That is, our questions do not simply check that companies are complying with minimum regulatory standards – in fact, we expect companies to meet all relevant regulatory requirements in the geographies in which they are operating and to clearly report on the welfare standards that they comply with for the benefit of audiences that may not be familiar with specific legislative requirements for individual species and/or geographies. Beyond this, the Benchmark is interested to understand the extent to which companies are meeting expected standards of animal welfare as defined and articulated by investors, by animal welfare organisations, and by consumers.

- Why are the BBFAW evaluation reports not available in companies' local languages? Surely this would encourage better understanding of the BBFAW methodology and criteria.
 - **BBFAW Comment:** *The Benchmark is focused on global companies (in terms of their scale, their geographic footprint) and our experience is that the senior management of these companies routinely use English as a*

standard language, and routinely compare themselves against their global peers. We address language issues and the need for communications to be tailored to local markets by ensuring that our assessors access and review relevant non-English publications as part of the company review process.

Key reflections from the BBFAW

Since the launch of the first Benchmark in 2012, we have seen a consistent improvement in corporate performance on farm animal welfare. We have seen significant increases in the number of companies that have published overarching policies on farm animal welfare and in the number that have published policies on specific animal welfare-related issues. Of particular note has been the rate at which companies are adopting policies on close confinement, and making commitments – albeit frequently limited to specific geographies and to specific species – to the avoidance of close confinement.

Both the Benchmark results and our discussions confirm that these are not just empty promises. Many companies are strengthening their internal processes (responsibilities, accountabilities, objectives and targets, training, corrective action) to give effect to these policy commitments. Despite this progress, it is too early to say exactly how these actions will affect animal welfare outcomes. Many of the companies we have spoken to have said that, while they intend to provide greater information on performance, they are reluctant to do so until they are satisfied with the robustness of their internal controls and with the effectiveness of their farm animal welfare management systems.

So what has driven these changes? It is clear that customer and client demand continue to be the most important influences on companies' approaches to farm animal welfare. The Business Benchmark on Farm Animal Welfare is also playing an increasingly important role, in particular, for those companies that have been covered by the Benchmark for more than one or two years.

As companies have sought to respond to customer and client expectations, they have looked for frameworks and tools to help them understand these expectations and to help them structure their management processes and reporting. In our dialogue with benchmarked companies, many have pointed to the quality and integrity of the Business Benchmark on Farm Animal Welfare and its influence on driving their approach to farm animal welfare. In particular, they report that the Benchmark provides companies with a clear and reliable set of expectations on farm animal welfare; it helps companies by identifying weaknesses and providing tangible guidance on where and how they can strengthen their management and reporting on farm animal welfare; it helps companies to understand their performance relative to their industry peers; it enables companies to bring farm animal welfare to the attention of senior management; and it helps companies to respond to investor and media interest in farm animal welfare. They have also highlighted the fact that the Benchmark is backed by leading animal welfare organisations, Compassion in World

Farming and World Animal Protection, and that the BBFAW has strong relationships with the investment industry.

The fact that companies recognise the value of the Benchmark as a management tool and as a tool to engage stakeholders – particularly suppliers and investors, is of particular significance given the BBFAW's objective to provide guidance to companies interested in improving their management of and reporting on farm animal welfare issues. Companies have also begun to put more effort into improving their disclosure on farm animal welfare, and we are starting to see greater innovation in this area as company reporting on farm animal welfare becomes more focused (i.e. attuned to the different information needs of stakeholders, from investors and NGOs to consumers) and more refined.

Of course, with increased disclosure comes greater accountability, and the Benchmark will continue to ensure that company statements are substantiated by evidence of affirmative action by companies. Increasingly, the BBFAW is holding companies to account for the accuracy and consistency of their public declarations on farm animal welfare commitments and practices. We expect companies to demonstrate the accuracy and authenticity of their stated commitments, through evidence of progress and incremental improvement, and through the reporting of positive welfare outcomes.

We are encouraged that the Business Benchmark is seen to be having a positive effect on the way that farm animal welfare is managed and reported by food companies, by, in particular: helping companies to better understand the needs and expectations of investors and other stakeholders on farm animal welfare; indicating to companies how they are performing against their industry peers; and providing a clear and practical framework for improving their management and reporting approach year-on-year.

We would like to thank all the companies for responding to our survey, and for the many conversations and meetings we have had with companies during 2016 on the Benchmark methodology and scope, on company's individual evaluation reports, and in connection with the preparation of the 2016 Benchmark report and launch event.

Next steps

We recognise the importance of continuing to work with companies. We will continue to actively engage with companies, both around the Benchmark itself (e.g. we will continue to provide feedback by phone or face-to-face on company performance) and more generally (e.g. through webinars and conferences, through the publication of briefings and reports on specific farm animal welfare-related issues). We are particularly keen to support greater dialogue between companies and investors on the issue of farm animal welfare and to build investor understanding of this issue.

In 2017, we will again consult with the companies covered by the Benchmark to understand the factors that are influencing their approach to farm animal welfare and to canvass opinion on whether and how the Benchmark might be further strengthened.

Authors' Details

Nicky Amos, Executive Director, BBFAW, is a corporate responsibility professional with 20 years' experience in managing and directing corporate responsibility in global companies, including The Body Shop International. She is recognised for her pioneering work around supply chain development, responsible sourcing and sustainability reporting, and for her work in developing global sustainability strategies, campaigns and communications for leading international businesses

Dr Rory Sullivan, Expert Adviser to BBFAW, is an internationally recognised expert on responsible investment. He has written/edited seven books on finance, environmental and development issues, including Valuing Corporate Responsibility (2011) and Responsible Investment (2006).

The **Business Benchmark on Farm Animal Welfare** is designed to help drive higher farm animal welfare standards in the world's leading food businesses. It is the first global measure of animal welfare standards in food companies and is designed for use by investors, companies, NGOs and other interested stakeholders. For more information, go to www.bbfa.com or contact the Programme Director, Nicky Amos: nicky@nicky-amos.co.uk.



ATTACHMENT 1

Welcome to the 2016 Company Survey.

Business Benchmark on Farm Animal Welfare - 2016 Company Survey

Introduction

Business Benchmark on Farm Animal Welfare - 2015 Company Survey

Main Drivers for Developing Farm Animal Welfare Approach

Your comments and suggestions are important in helping us to improve the Business Benchmark on Farm Animal Welfare. Please take five minutes to complete this short survey. Your responses will be treated in confidence.

Many thanks for your support.

Kind regards,

**Nicky Amos
Executive Director
Business Benchmark on Farm Animal Welfare**

1. Has your company developed its approach to farm animal welfare over the past 2-3 years?

Yes / No

2. What have been the factors influencing your approach to farm animal welfare?
(please tick all that apply)

Business Benchmark on Farm Animal Welfare – 2016 Company Survey

- Regulatory pressures
- Cost pressures
- Peer pressures
- Media interest
- Customer interest
- Investor pressure
- NGO pressure
- The Business Benchmark on Farm Animal Welfare
- Other (please specify)

3. What are the main reasons for not developing your farm animal welfare approach? (please tick all that apply)

- Lack of senior management attention or internal buy-in
- External stakeholders do not appear to be interested in the issue
- There are other priorities for us to focus on
- Budgetary restraints
- Lack of resources to manage or report on farm animal welfare
- Lack of technical knowledge on farm animal welfare
- Other (please specify)

* 4. Has the Business Benchmark on Farm Animal Welfare influenced your approach to farm animal welfare in any way?

Yes / No

5. How is the BBFAW influencing your approach to farm animal welfare (please tick all that apply)

Business Benchmark on Farm Animal Welfare - 2015 Company Survey

End of Survey

- It provides a clear set of expectations
- It attracts senior management attention
- It enables us to benchmark our approach against our industry peers
- It helps us to improve our farm animal welfare management processes
- It helps us to improve our farm animal welfare reporting
- It raises our profile on farm animal welfare
- It provides us with access to technical support and expertise from Compassion in World Farming
- It provides us with access to technical support and expertise from World Animal Protection
- It enables us to respond to questions asked by investors
- It enables us to respond to questions asked by customers
- It enables us to respond to questions asked by the media
- Other (please specify)

4. Company Details

Name

Company

Country

Email Address

Phone Number

Thank you for taking the time to complete this survey. We will summarise the results and share these with you shortly.