

COMMUNITY TRUST IN AUSTRALIA'S RURAL INDUSTRIES

Year Three National Survey
2022



CITATION

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RESEARCHER CONTACT DETAILS

Dr Kieren Moffat
Voconiq CEO and Co-founder
info@voconiq.com

VOCONIQ, OUR STORY

Voconiq is an Australian data science company built on a platform of research developed by Australia's national science agency, CSIRO. The Voconiq founding team spent 11 years in CSIRO building this science platform, engaging over 70,000 community members in 14 countries to understand what leads to deeper trust between industries, companies and governments, and the communities they work alongside. Founded in 2019, Voconiq was created as a vehicle for delivering this science as a service globally. Voconiq is the home of Engagement Science and we are passionate about giving voice to communities large and local about the issues that matter to them and helping those that work alongside them to listen to community voices effectively.

To learn more, go to www.voconiq.com

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CONTENTS

4

Acknowledgements

6

Overview of key findings

8

Introduction

9

The research process

10

Who completed the national survey?

11

Rural industries are growing in their importance to Australians

13

Community trust in and acceptance of rural industries is strong

15

Responsiveness of rural industries

16

Important issues for Australia's rural industries

21

Working conditions in rural industries

22

Animal welfare

25

Food safety and chemical use

27

Accountability and sharing benefits

30

The pathways to deeper community trust

33

Conclusion

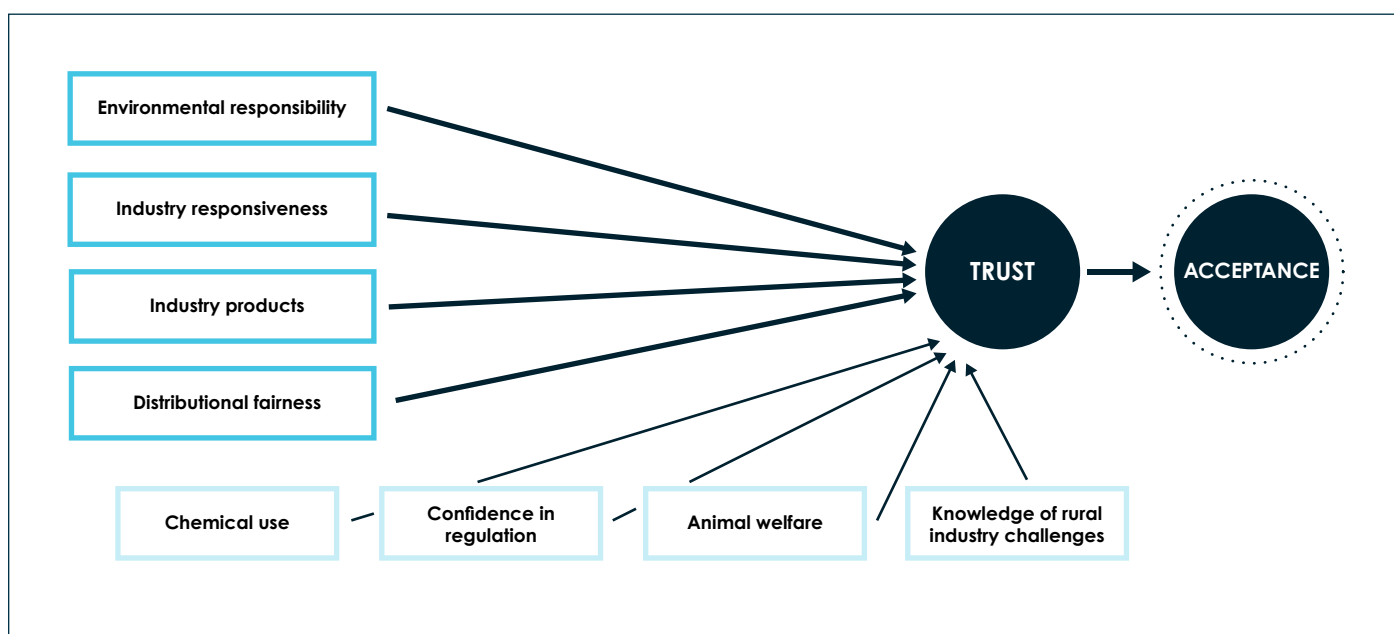
OVERVIEW OF KEY FINDINGS

The Community Trust in Rural Industries (CTRI) project has been conducted since 2019, almost 20,000 Australians projecting their voices into the heart of rural industry decision making via a representative annual national survey. The longitudinal nature of this research has provided a rich set of data, illuminating the dynamic nature of community sentiment, the pathways to deeper trust in and acceptance of rural industries, and the challenges that rural industries must continue to focus on.

DRIVERS OF TRUST AND ACCEPTANCE

In 2019, 2020, and now in 2021, the key drivers of community trust in rural industries have remained consistent. The extent to which rural industries are considered to manage their environmental performance effectively and the extent to which they are seen to be responsive to community concerns, the more community members trust rural industries.

In addition, a number of factors were found to be less prominent albeit statistically significant drivers of trust. These included distributional fairness (i.e. the extent to which Australians feel like they get a fair share of the benefits created by rural industries), the quality and role of rural industry products in the lives of Australians, and animal welfare. Community concern with chemical use was found to undermine trust, while confidence in government regulation and greater knowledge about how rural industries operate were found to improve trust.



KEY CHANGES OVER TIME

The longitudinal nature of this research shows that trust in and acceptance of rural industries remain strong, although both have dropped slightly since 2020 after improving through the first year of the COVID-19 pandemic. Apparent in this year's data is that trust acts as a lead indicator of community acceptance for rural industries, re-emphasising the need to focus on building trust as a means for managing social risk for these industries.

Responsiveness of rural industries also remains strong, with the extent to which community members feel they are willing to change their practices in response to community concerns increasing in each of the three annual surveys.

A large majority of Australians see environmental management as a responsibility shared among all rural industries in 2021 as they have across the previous two years; a key finding in this work and endorsement of the collaboration between 11 rural industry Research and Development Corporations (RDC), the New South Wales Department of Primary Industries (NSWDPI) and the National Farmers Federation (NFF) to fund the research.

There are clear challenges in the longitudinal data for rural industries as well, with a decline in the Year Three sentiment that workers in Australian rural industries are paid a fair wage for their work. There has also been a significant and steady decline in sentiment about food safety standards in Australia, albeit from a very high starting position in 2019. We also found that the use of chemicals

has remained an area of concern among community members in each of the three years. New measures in Year Three show that the use of glyphosate was more strongly supported when it is used to enable better soil health relative to increasing the amount of produce for export or reducing consumer costs in the domestic market.

On animal welfare, we observed consistent community sentiment across time that welfare is a complex issue and involves more than just the absence of harm for animals. The bar is high for rural industries that involve animals, although community members also understand that welfare is not a simple issue to manage. New questions included in 2021 also revealed that community members concerns and expectations around animal welfare are often well aligned with those of people working in rural industries. However, there is work for rural industries to address a perception that financial sustainability may encourage farmers to "cut corners" on welfare.

New measures included in Year Three on the topic of industry governance revealed that Australians see greater power in their own consumer-based choices in shaping behaviour within rural industries than government regulation. The Year Three research also highlights that Australians themselves see the responsibility for ethical choices by rural industry participants being in part dependent on their own positions as expressed through choices at the supermarket.

INTRODUCTION

Community trust is a dynamic and central consideration for all Australian rural industries. Through the Community Trust in Rural Industries program of research and insight extension, the Australian community itself has made this clear. In this third and final year of the current research program, we reconfirm this fact and draw out trends in sentiment data collected at four distinct time points since 2019.

Much has happened since the current program of research commenced in 2019. The world has been gripped by the most significant pandemic in a century, Australia and its rural industries have been impacted by floods and fire, and geopolitical strife on the other side of the world have affected supply chains, significantly increased input costs and the value of some Australian commodities. Cost of living pressures and labour supply challenges have also created a tumultuous backdrop for the Year Three research, reinforcing the dynamic nature of the relationship that rural industries have with the Australian people and the value in tracking the key attributes of this relationship.

The Year Three research subsequently reveals a more complex story than was evident in previous years. These findings reinforce the need for rural industries to work together in addressing the concerns of Australians in responsive and meaningful ways and to grow the esteem that rural industries hold within our national story and economic future.

Since 2019, the research program has itself been responsive to the findings of the research. In its first year, the research established a comprehensive baseline of community sentiment toward rural industries. In Year Two, we went deeper into the key identified drivers of community trust in rural industries and more clearly revealed the role and risk that gaps in community understanding of rural industries plays in the status of its relationship with community members.

Most importantly, this Year Two research revealed the power of connection in growing community trust. We found that the transactional process of purchasing a high-quality rural industry product helps community members feel closer to the farmers, fishers or foresters that created them. We also found that the 'city / country divide' is a misunderstanding of the role geography plays in this relationship, with the number of people community members know directly that work in a rural industry a much stronger influence on attitudes toward these industries than where a community member resides.

In Year Three, we took the opportunity to refine the survey instrument further in the pursuit of deeper, more challenging truths. Two sets of new measures were included in this year's work. The first was a collection of questions that challenged participants to consider difficult trade offs related to previously identified challenging issues such as chemical and fertiliser use, genetic modification, and animal welfare. In many ways, these new items invite community members to consider the difficult choices and complexity that farmers, fishers and foresters themselves confront every day in their work. The second, related set of new questions examined the extent to which community members and rural industry participants are aligned in their interests on similar topics. Together, they add additional texture and direction for rural industries and community to find deeper connection, identify areas where work must be done, and opportunity for engagement with industry stakeholders.

THE RESEARCH PROCESS

Consistent across all three years of this research, an online survey methodology was used to access the views of Australians over the age of 18 years. Using an online research panel to ensure a broadly representative sample of Australians by age and gender, participants were recruited across the country between 17 December 2021 and 31 January 2022. 4,969 surveys were included for analysis after data cleaning¹.

- Environmental impacts and management,
- Animal welfare,
- The importance of regional communities,
- The importance of rural industry products,
- Health, safety and working conditions of workers in rural industries,
- Drought, climate variability and climate change,
- Innovation in rural industries,
- Confidence in regulation and internal industry standards,
- Industry responsiveness,
- Trust in rural industries,
- Acceptance of rural industries.

Participants were also encouraged to make freeform comments at the end of the survey, and a selection of these comments are included throughout this report.

YEAR THREE SURVEY CONTENT

A key value point in this research is the tracking of key measures over time. For this reason, many of the same questions included in Year One and Two were again included in Year Three. As noted above, two additional sets of questions were included in this year's survey. Alongside a comprehensive set of demographic questions, measures of community sentiment toward the following topics were included in Year Three²:

- Importance of rural industries in Australian life and nutrition,
- Self-rated knowledge about rural industries,
- Personal connection to rural industries,

¹Data cleaning¹ is conducted in order to ensure the quality of data included in analyses is high. This involves screening and potential removal of surveys where, for example, participants answered the survey very quickly (i.e. less than 5 minutes), in ways that indicate lack of attention to the content of questions, and extreme or consistent responding on survey questions (i.e. answering '1' to all questions). For more detail on what this involves, see Meade AW and Bartholomew C. (2012) Identifying careless responses in survey design. *Psychological Methods*, 17(3), 437-455. DOI: 10.1037/a0028085.

²Most topics were measured using 5-point Likert type agreement scales, where 1 = Strongly disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly agree. When reporting, categories may be combined to express "agreement" (combining results of Agree and Strongly agree) and "disagreement" (combining results of Disagree and Strongly Disagree).

WHO COMPLETED THE NATIONAL SURVEY?

4,969

PARTICIPANTS IN THE YEAR THREE SURVEY

19,194

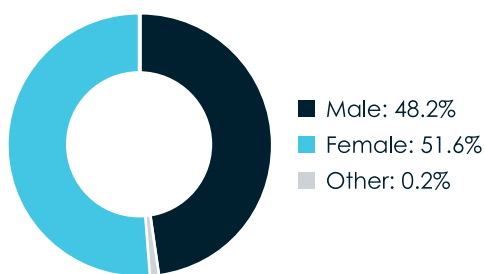
PARTICIPANTS IN THE PROGRAM OVERALL

0 5,000 10,000 15,000 20,000

AVERAGE AGE

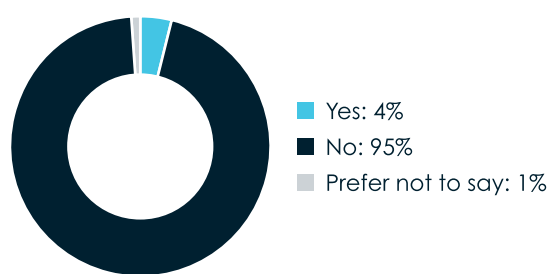


GENDER



Male: 48.2%
Female: 51.6%
Other: 0.2%

ABORIGINAL AND TORRES STRAIT ISLANDER STATUS



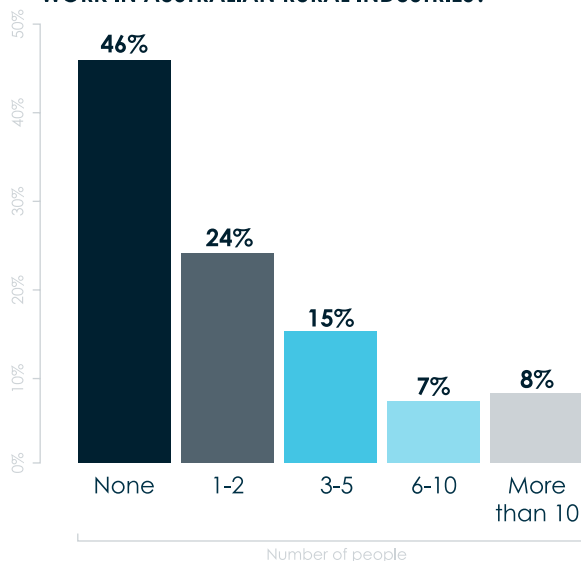
Yes: 4%
No: 95%
Prefer not to say: 1%

EDUCATION LEVEL

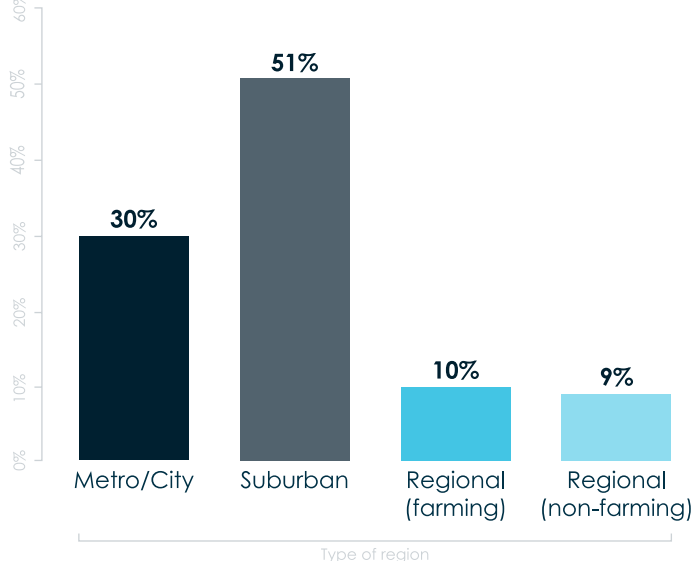


Did not complete Year 10: 3%
Completed Year 10: 8%
Did not complete Year 12: 3%
Completed Year 12: 17%
Certificate: 16%
Advanced Diploma and Diploma: 13%
Bachelor Degree: 25%
Graduate Degree and Graduate Certificate: 4%
Postgraduate Degree: 11%

HOW MANY PEOPLE DO YOU KNOW PERSONALLY WHO WORK IN AUSTRALIAN RURAL INDUSTRIES?



WHAT WOULD YOU SAY BEST DESCRIBES THE REGION THAT YOU LIVE IN?



RURAL INDUSTRIES ARE GROWING IN THEIR IMPORTANCE TO AUSTRALIANS

Over the last three years, the Community Trust in Rural Industries program of research has tracked many key attributes in the relationship rural industries have with the Australian community. A key feature of this work has been to go beyond these direct measures of sentiment to understand and track features of the social context in which rural industries operate. Primary among these are measures of the broader value Australians place on rural industries, the role they play in our lives, and their economic contribution to the nation.

AUSTRALIANS HIGHLY VALUE THEIR RURAL INDUSTRIES

Three years of data have shown that farmers, fishers and foresters are seen to play an increasingly important role in Australia. The proportion of Australians in agreement that rural industries are important to our way of life in this country has grown from 85.5% in 2019 to 88.2% in 2021 (see Figure 1)³.

When we look at specific industries, the story is similar. Agreement that the role fishers play in Australian society has increased over this period of time 80.2% to 82.5%, while for the forestry industry this improvement has been even more marked. Positive ratings of the forestry industry have increased by 8% since 2019, with sizeable improvement at each of the three main data collection time points (see Figure 1).

We also found that three quarters of Australians in Year Three agree that "Exporting the products of Australian rural industries is good for Australia". Rural industries are also seen to be strong drivers of regional employment with 82.6% of participants agreeing they generate significant local jobs in regional areas.

It is not just the role of rural industries that Australians value but regional communities that host their work as well. Consistently across the three years of this research, close to 85% of Australians have expressed agreement that "Strong regional communities are important for producing safe, high-quality food and fibre products in Australia". This is important for rural industries to understand, that Australians not only value them but they understand that regional community strength and resilience is fundamental to their success.

³Throughout this report, the percentage change in the proportion of agreement between one or more years is reported. A percentage change of approximately 2% may be considered statistically significant at a $p < 0.01$ level.

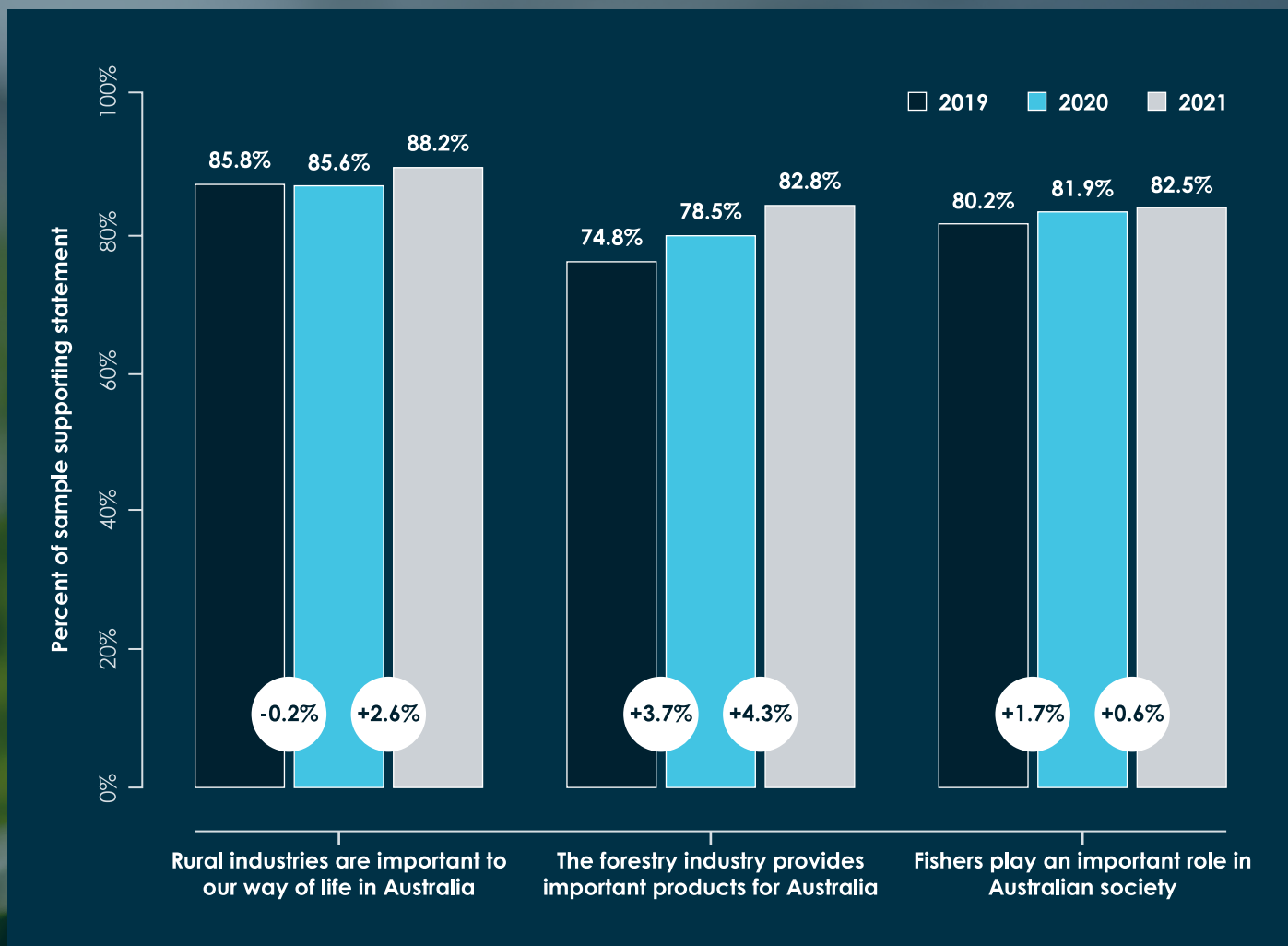


Figure 1. Proportion of agreement with rural industry importance statements.

“I’m very proud of our rural industries and think Australia produces the best food in the world”

Comment from 2021 survey participant.

COMMUNITY TRUST IN AND ACCEPTANCE OF RURAL INDUSTRIES IS STRONG

We have found in this program of research that trust in rural industries is a central feature in the relationship between rural industries and the Australian community. It acts as a kind of vehicle that translates community expectations and experience of rural industries and its products into community acceptance of rural industries. When trust increases, so does community acceptance of rural industries and their activities.

The average level of trust in rural industries in Year Three was 3.4 (on a scale from 1=Not at all to 5=Extremely). This is well above the midpoint of the scale used (i.e. 3). Trust dropped slightly from Year Two (Mean = 3.5). Acceptance of rural industries in Year Three was 3.8 on the same 5-point scale. Acceptance is also slightly lower than it was in Year Two (Mean = 3.9) but remains above the Year One average of 3.6.

Together, trust in and acceptance of rural industries has remained strong over the three years of research, providing rural industries with a sound platform from which to work on deepening this relationship. Considered alongside very positive ratings of rural industry importance, this should provide rural industries with confidence to engage community on challenging issues in the knowledge that relational capital is high.

TRUST AS A LEAD INDICATOR

The nature of this research program has allowed us to observe trends in the data that reveal more about the relationship between community trust and acceptance. As shown in Figure 2, levels of trust and acceptance have tracked each other fairly closely over the three years, with one important feature to note. In Year One we conducted two surveys, the main large scale dataset that was presented in the Year One report and a second, shorter

'Pulse' survey in May 2020 (approximately six months after the project began). In May 2020 the full impacts of the COVID-19 pandemic were being felt across the country with lockdowns, economic disruption, and supply chain challenges for many products including fresh food.

Looking at Figure 2, the effect of the pandemic on community trust and acceptance was dramatic. Both increased significantly in a very short period. However, what we can also now understand with more data points is that acceptance moves with trust, with a lag. While trust dropped back toward pre-pandemic levels in the Year Two survey, acceptance continued to rise. In Year Three we can see that acceptance has come back down towards trust.

This shows clearly that trust is a lead indicator of acceptance. It reinforces previous work in this program that rural industries should be focusing on influencing and building trust with Australians. Later in this report we present the results of path modelling that shows how this works more explicitly, but here we see the value of seeing trust as a lead indicator of social risk (i.e. community acceptance).

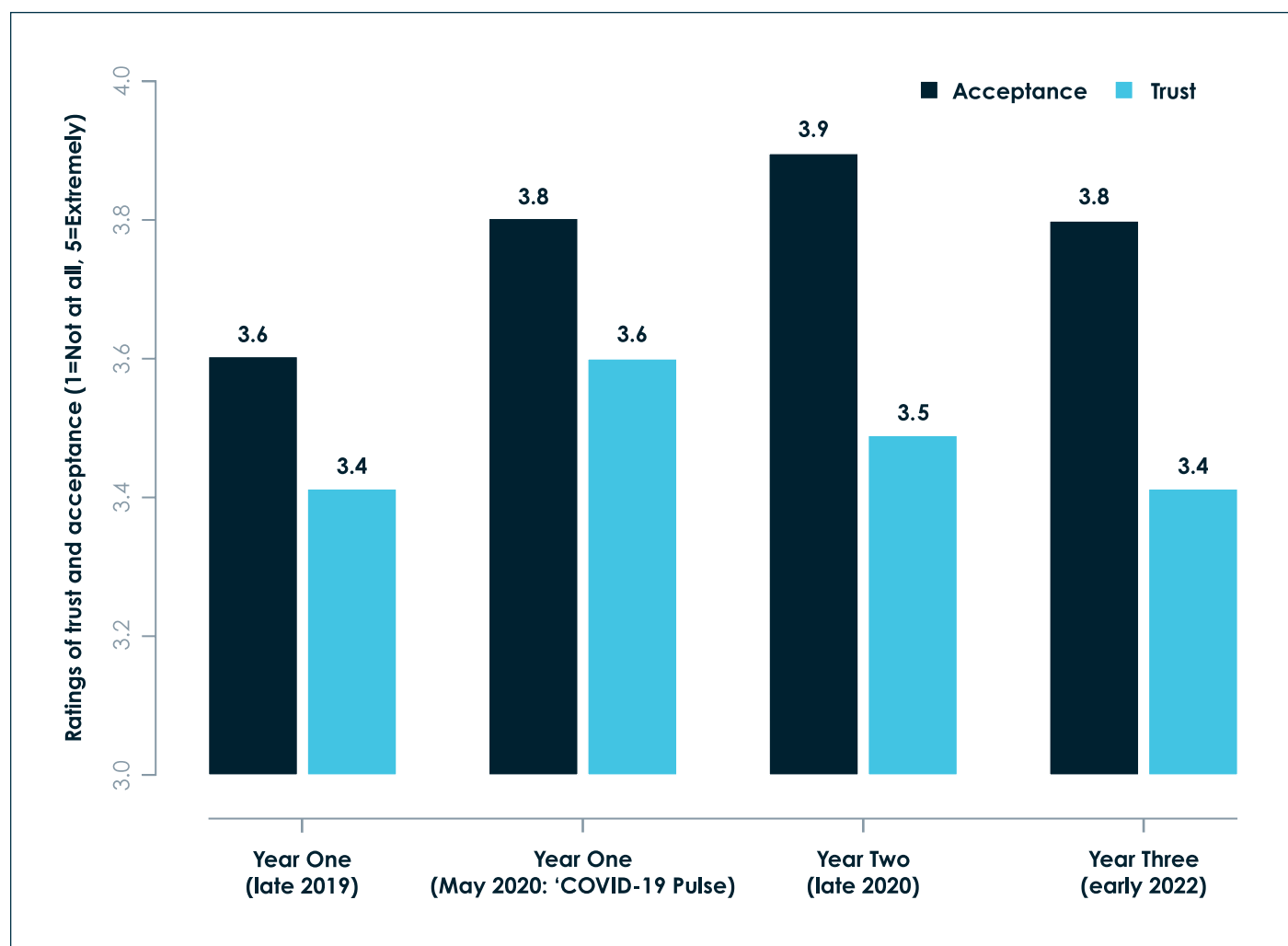


Figure 2. Mean ratings of trust in and acceptance of rural industries, Year One to Year Three.



RESPONSIVENESS OF RURAL INDUSTRIES

A strong driver of community is how engaged rural industries are with the issues that matter to community members. In each of the three years of this work, we have measured the extent to which community members feel heard and respected by rural industries, and how prepared they feel rural industries are to change their practises based on community concerns.

The proportion of the Australian community that are in agreement that rural industries listen to and respect their views has improved since 2019, although the pattern of responses in each year closely reflect the pattern for trust (see Figure 3). The extent to which community believe rural industries are prepared to change based on

community concerns has improved in each year of this work, with agreement in Year Three 5.9% higher than in Year One.

While the proportion of community members in agreement with these statements is around 50% of the population, the level of disagreement is much lower: 11% for listening and respecting community opinions and 13% for being prepared to change. The balance of ratings were in the neutral category, at 38% and 37%, respectively (see Figure 4). This both places the proportion of agreement into a very positive context and represents an opportunity for rural industries to engage those 'neutral' community members to demonstrate its responsiveness.

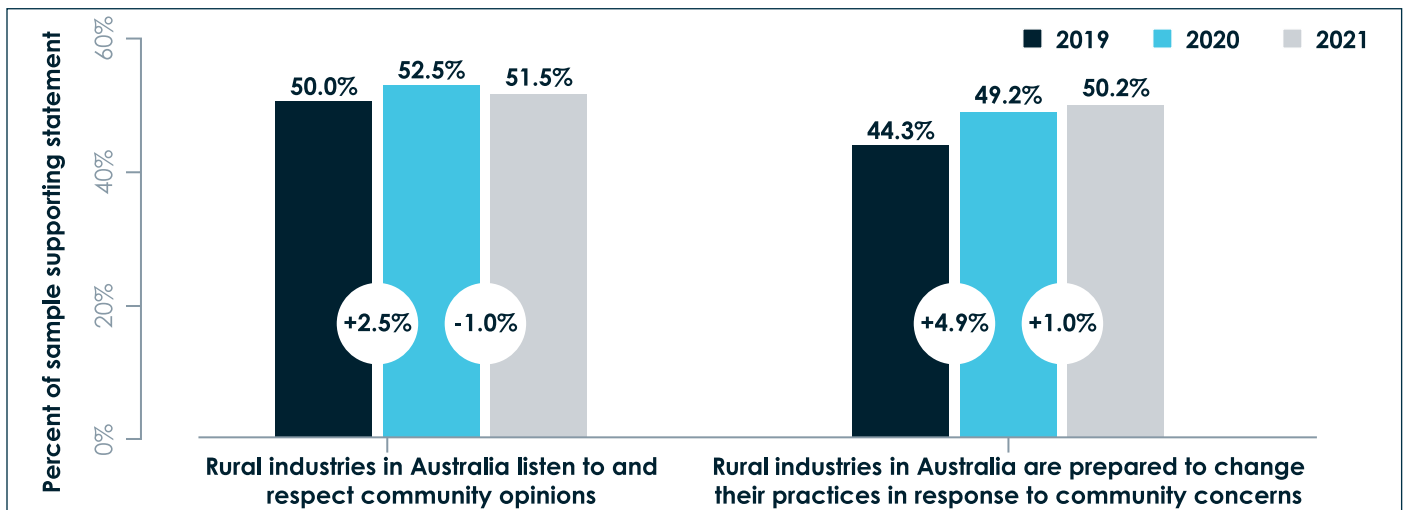


Figure 3. Percentage of agreement with industry responsiveness measure, Year One to Year Three.

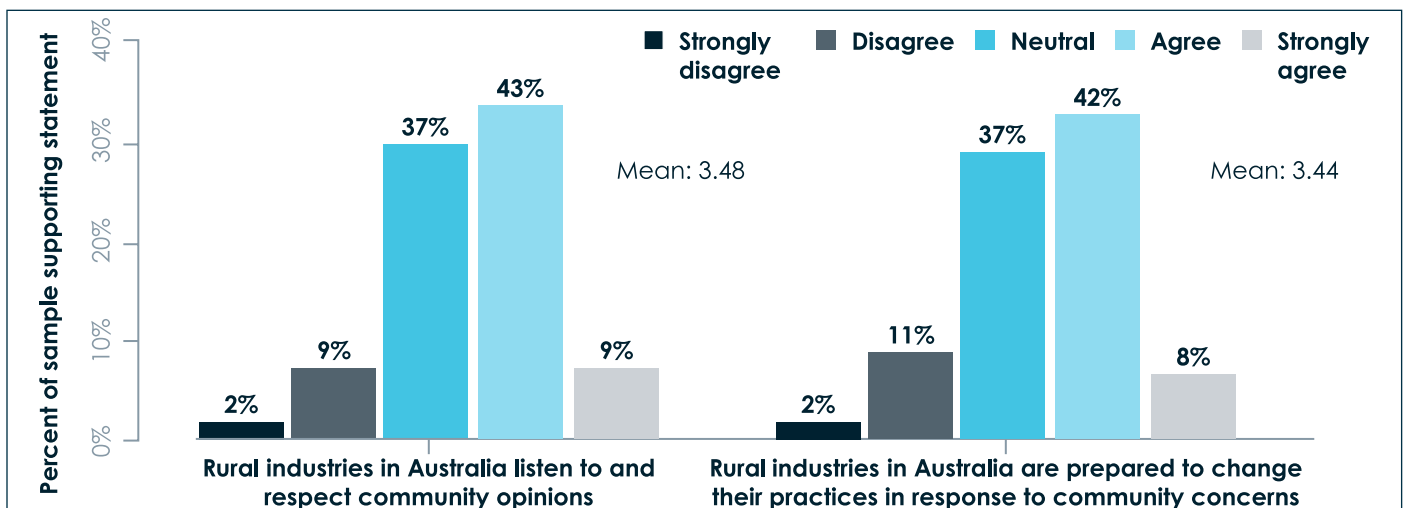


Figure 4. Distribution of scores for responsiveness measures, Year Three.

IMPORTANT ISSUES FOR AUSTRALIA'S RURAL INDUSTRIES

For many Australians, there are issues that rural industries influence and are influenced by, that are of concern to them. Issues such as environmental sustainability, the effects of drought, water use, animal welfare, and chemical use. In each year of the research program, we explore these in detail, providing a unique insight into how Australian views have changed since 2019.

WATER, THE ENVIRONMENT AND CLIMATE VARIABILITY

Water is fundamental to life and its use by rural industries is an area of keen interest among Australians. As a land of increasing climate extremes, things change in three years. Since 2019, much of Australia has experienced drought, fires, and floods and we have seen the effect of this in community responses. In the Year Two survey, we included two new measures related to water, both of which appear to have been affected by the onset of the La Niña weather event (see Figure 5). In late 2020, 63.5% of Australians agreed that "Much of Australia is in drought" and 51.1% agreed that "Water should only be used by agricultural industries after making sure the environment has enough". In 2021, this had dropped to 54.7% and 46.2%, respectively.

Since 2019, there has been a modest decline in levels of agreement that "Australian rural industries use water responsibly" (from 49.4% to 46.9% agreement). In this same period, the proportion of Australians in agreement that water is allocated for different uses appropriately in Australia, increased from 27.8% in 2019 to 31.6% in 2021.

Looking at measures of environmental sustainability and management now, we asked participants in all three years of the research the extent to which they agree that "Protecting the environment is more important than protecting people's jobs". 46.8% of Australians agreed with this statement in 2019, dropping significantly in 2020 to 38.3% and holding steady in 2021 at 37.1%. The COVID-19 pandemic began soon after the 2019 data was collected, bringing into sharp relief the importance of protecting employment, and may have influenced these results.

There was also a decline in agreement between Year One and Year Two in agreement that "Economic sustainability of Australian rural industries should not come at the expense of environmental management". Between 2019 and 2020 this dropped from 65.7% to 61.2% and declined further in 2021 to 60.3%.



“Why is Australia growing and producing water hungry crops like cotton instead of hemp that is a far superior product and uses a lot less water, why are we raising so much beef for export when it uses so much water, supply what we need and use a less water use item for export, the government and land owners need to be smarter about this then they can still make money but not destroy this country.”

Comment from 2021 survey participant.

“Concerned about Foreign ownership of land and businesses who manipulate “water” supply. Disadvantaging the natural flow of rivers and other farmers “downstream”.”

Comment from 2021 survey participant.

ALL IN THIS TOGETHER

The Community Trust in Rural industries program of research is a unique collaboration between 11 RDCs, NSW DPI and NFF, managed by AgriFutures Australia. It is by its nature, a reflection of a shared sense of purpose and common fate in addressing community trust. In each of the three years of this work, we have measured the extent to which Australians agree that "Environmental management is a shared responsibility across all Australian rural industries". As illustrated in Figure 6, agreement levels decreased from Year One to Year Two and then increased again in Year Three. The main story here though is that agreement has averaged above 80% of Australians across the three years. Australians have clearly indicated that rural industries need to work together in this area which is particularly relevant given environmental responsibility is such a strong driver of trust in rural industries.

TRADE OFFS AND ALIGNED INTERESTS

We also asked a series of questions that explored very specific topics in novel ways. These questions presented trade-offs or challenges of aligned interests to participants and asked them to rate their level of agreement on the same scale: 1 (Strongly disagree) to 5 (Strongly agree). With respect to broader environmental management by rural industries, we presented the following position to community members: "Fundamentally, it is not in the best interests of farmers to look after the environment". Sixty seven percent of participants disagreed with this statement, 17% were neutral and 16% agreed. While

there were not significant demographic differences on many questions in the Year Three survey, on this measure people in different age categories had different views. Those in younger age categories indicated greater levels of agreement that it is not in the interests of farmers to look after the environment, relative to those in older age categories (see Figure 7).

Similarly, we asked participants the extent to which they agreed that "Fishers' and farmers' business suffers if they don't look after their local environment", with 85% of Australians in agreement, just 3% disagreeing and 12% indicating neutral. Together, these items show that on fundamental questions of environmental sustainability, community members feel strongly that rural industries share similar value with community.

“The whole subject is fraught with difficulty. Some farmers are very aware and do their best to promote sustainable agriculture while others not so.”

Comment from 2021 survey participant.

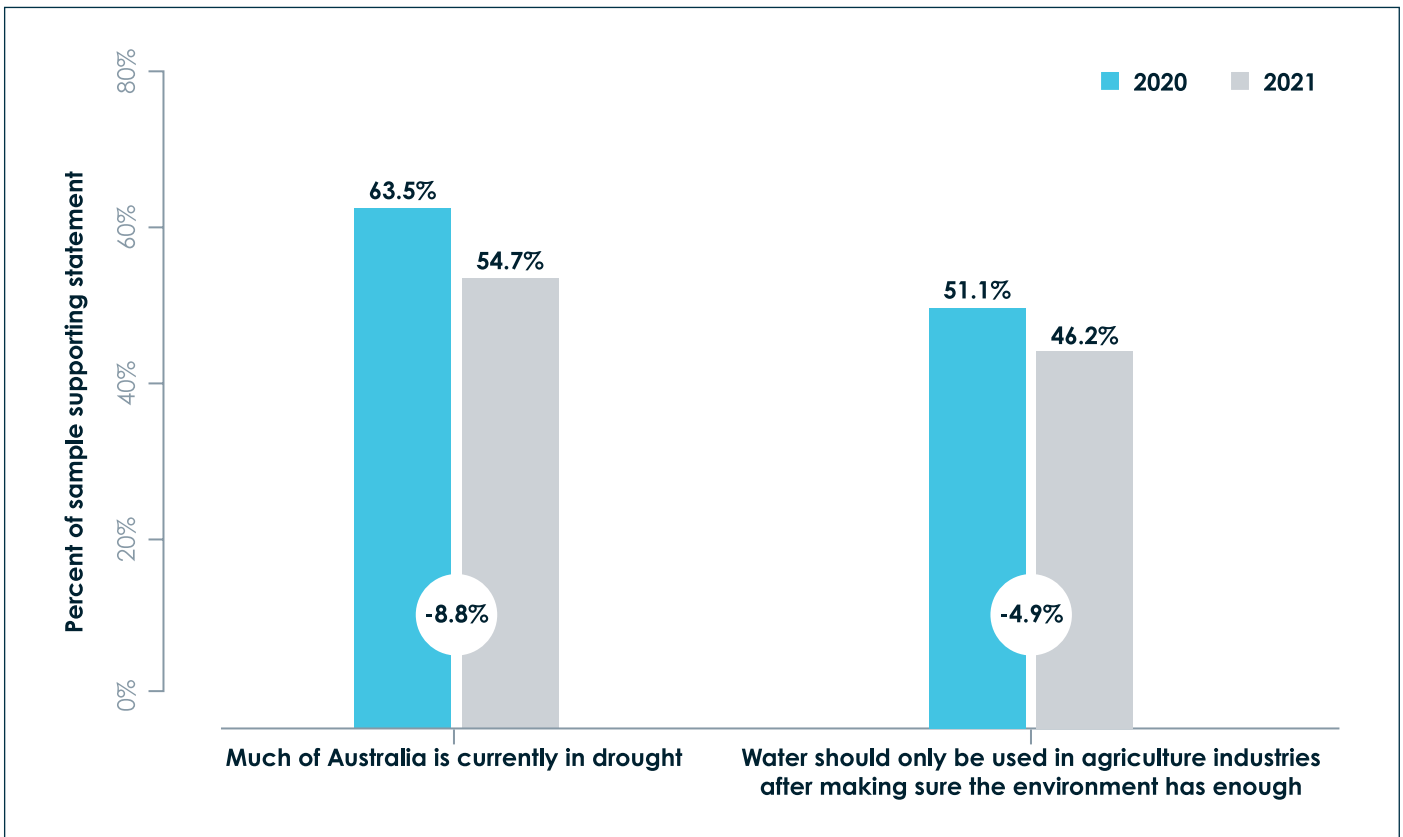


Figure 5. Proportion of agreement with drought and water questions, Year Two and Year Three.

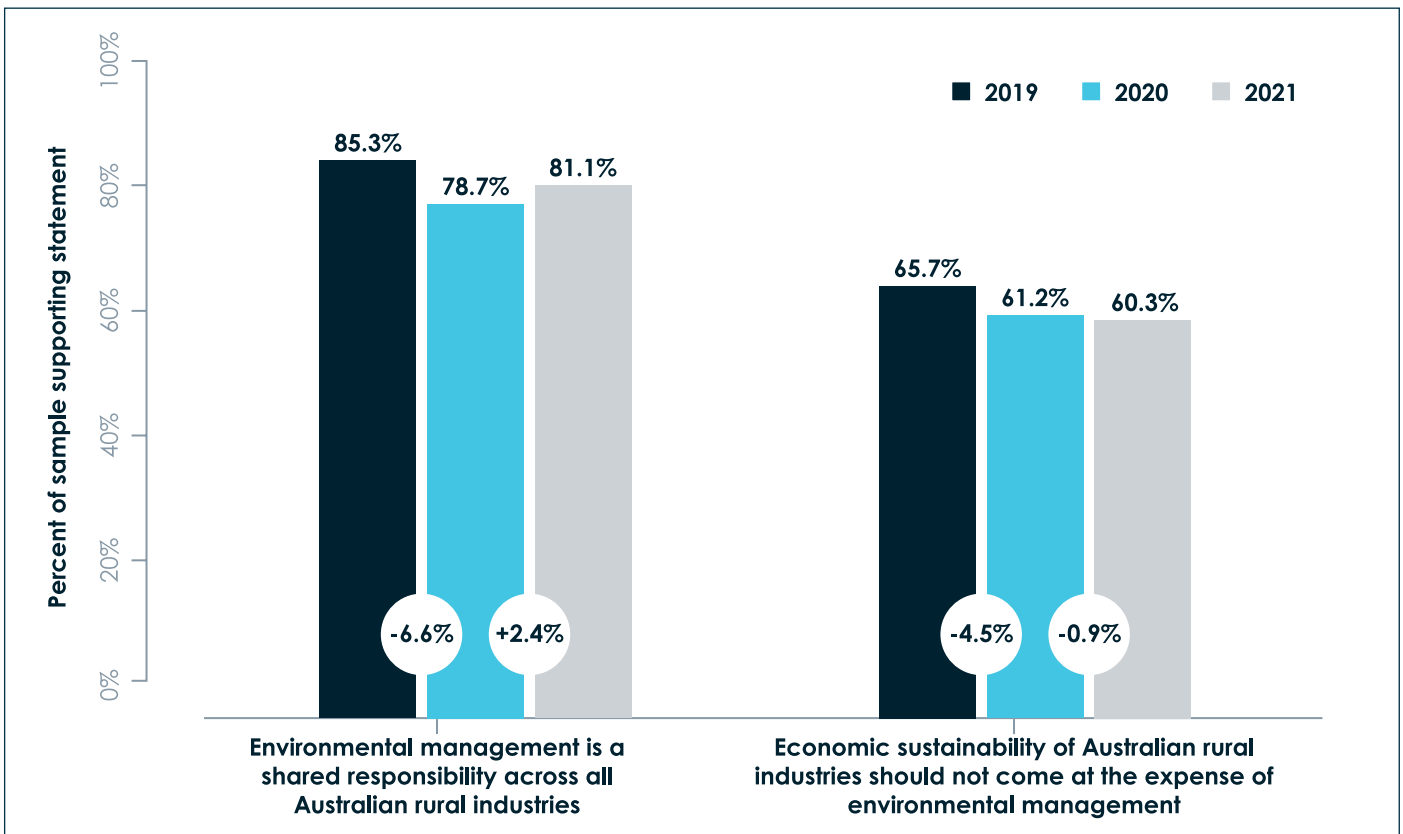


Figure 6. Environmental management questions, Years One to Three.

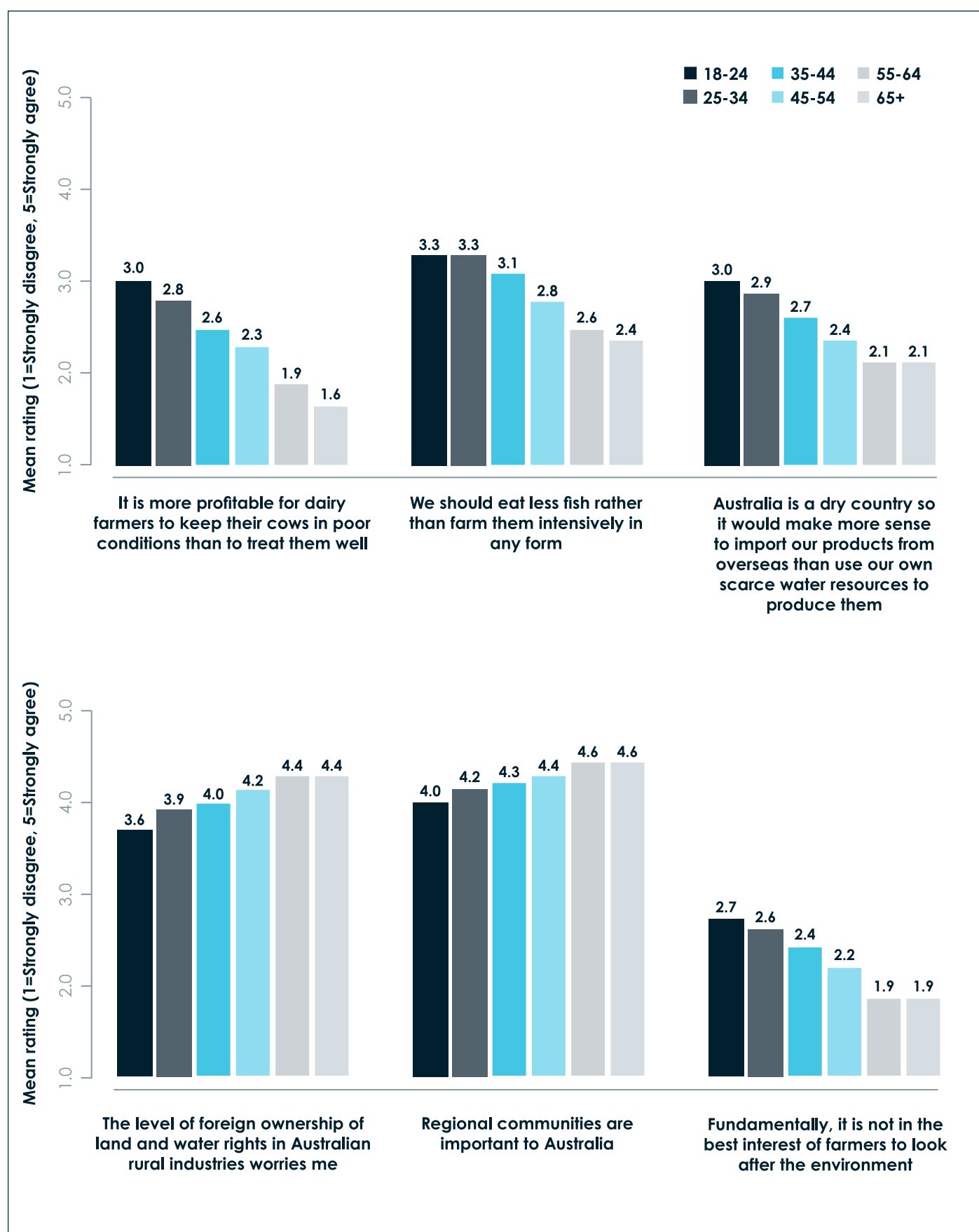


Figure 7 Mean ratings of concern for the environment, Year Three by age category.

WORKING CONDITIONS IN RURAL INDUSTRIES

Australian rural industries are experiencing a severe labour shortage and increasing input costs^{4,5}. While it is difficult to influence border entry restrictions because of COVID-19 or fuel price sparked by geopolitical issues, rural industries can influence how attractive it is as a place to work. In a measure included for the first time in 2021, 62.9% of Australians do believe that rural industries offer meaningful careers for those that choose to work in the area (only 7% disagreed and 30% were neutral).

However, we also asked Australians the extent to which they agree that "Workers in Australian rural industries are paid a fair wage for their work", with just 34% of participants agreeing in 2019, 34.1% in 2020, and then 30.2% in 2021 (see Figure 8).

Over the same period, Australians felt more strongly that "Exploitation of workers is a serious problem in Australian

rural industries", with the proportion of participants in agreement increasing (modestly) each year (see Figure 8).

Working in a rural industry may not be for everybody, but addressing broader community perceptions about what it is like to work in one is important to attract new industry participants.

"We are very fortunate in Australia to have reliable, ethical, hardworking and dedicated farmers and rural industry workers."

Comment from 2021 survey participant.

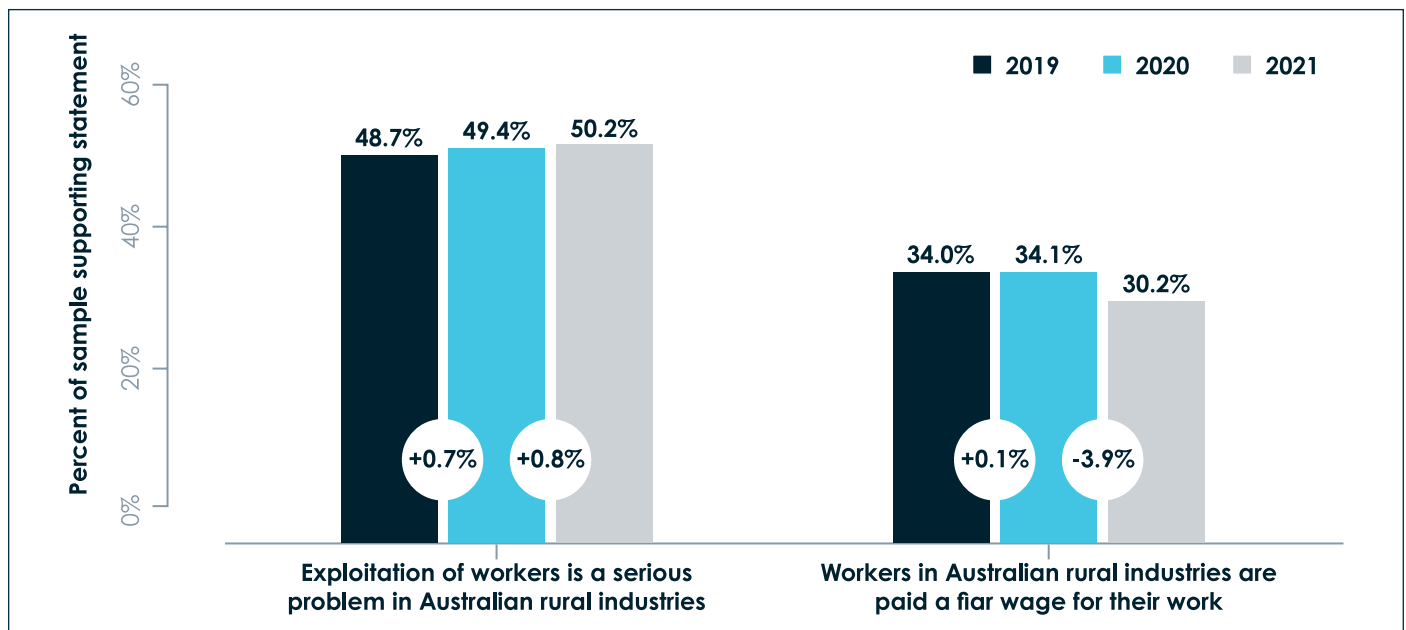


Figure 8. Proportion of agreement with working condition questions, Years One to Three.

⁴ABARES, 2021, Labour use in Australian agriculture: Analysis of survey results, ABARES, Canberra, November, CC BY 4.0. DOI: <https://doi.org/10.25814/sjdk-fp88>

⁵AUSTRADE, 2022, Insight - Farm, food costs rise due to higher energy prices, AUSTRADE March 4, Accessed from: <https://www.austrade.gov.au/news/insights/insight-farm-food-costs-rise-due-to-higher-energy-prices>

ANIMAL WELFARE

Australians strongly feel that animal welfare is an important issue for those rural industries that involve animals. In general, most Australians feel that rural industries also share this concern. In 2021, 58.5% of Australians felt that farmers treat animals with dignity and respect throughout their lives with only 14% disagreeing with this sentiment.

For most Australians, there is also acknowledgement that animal welfare in rural industries is a complex issue (agreement has averaged close to 70% in each of the three years of data collection), and that the welfare of animals is not just about the absence of harm to animals (agreement has averaged 75% in all three years of this research; see Figure 9). Together, this highlights that Australians have a nuanced understanding of the challenges in ensuring high standards of animal welfare, and that treatment expectations go beyond preventing harm to consider other aspects of wellbeing.

We also asked participants the extent to which they consider the welfare of fish in the same way they think about the welfare of other animals like cows or pigs. In 2020 and 2021, approximately one third of Australians agreed that they think about fish and cows or pigs differently in a welfare context. However, examining the distribution of scores on this measure in 2021 (see Figure 10), we can see there are two stories in this data. While a third of the sample do not see them as being different, 43% do see these types of animals differently in an animal welfare context, and 25% were neutral. Together this shows that large parts of the community have different perspectives on how welfare standards may be applied to different animals.

TRADE OFFS AND ALIGNED INTERESTS

Community members were also asked to consider the extent to which ensuring animal welfare made good business sense to Australia's farmers, fishers, and foresters. For example, we asked Australians the extent to which they agreed that "It is more profitable for dairy farmers to keep cows in poor conditions than to treat them well", with 61% disagreeing with this statement, 19% neutral and 20% in agreement. Similarly, 71% disagreed that it is unrealistic to expect cattle farmers to care about animal welfare", with 15% neutral and 14% in agreement. Looking at a seafood related industry, we asked whether "We should eat less fish rather than farm them intensively in any form", with 40% in disagreement, 31% neutral and 29% in agreement. On each of these measures, people living in metropolitan areas were in stronger agreement with these statements than people living in regional areas.

Finally, we asked participants whether "profitability will always push farmers to cut corners around animal welfare". On this measure, responses were less categorical, with 41% of Australians in agreement, 32% neutral in their responses and 27% disagreeing. Together, these questions show that there is work to do with the Australian community to demonstrate how animal welfare is considered by rural industries as an issue, and how aligned good welfare standards are with industry's economic interests. People living in metropolitan areas were more negative in their views on this measure than people living in suburban or regional areas of the country.

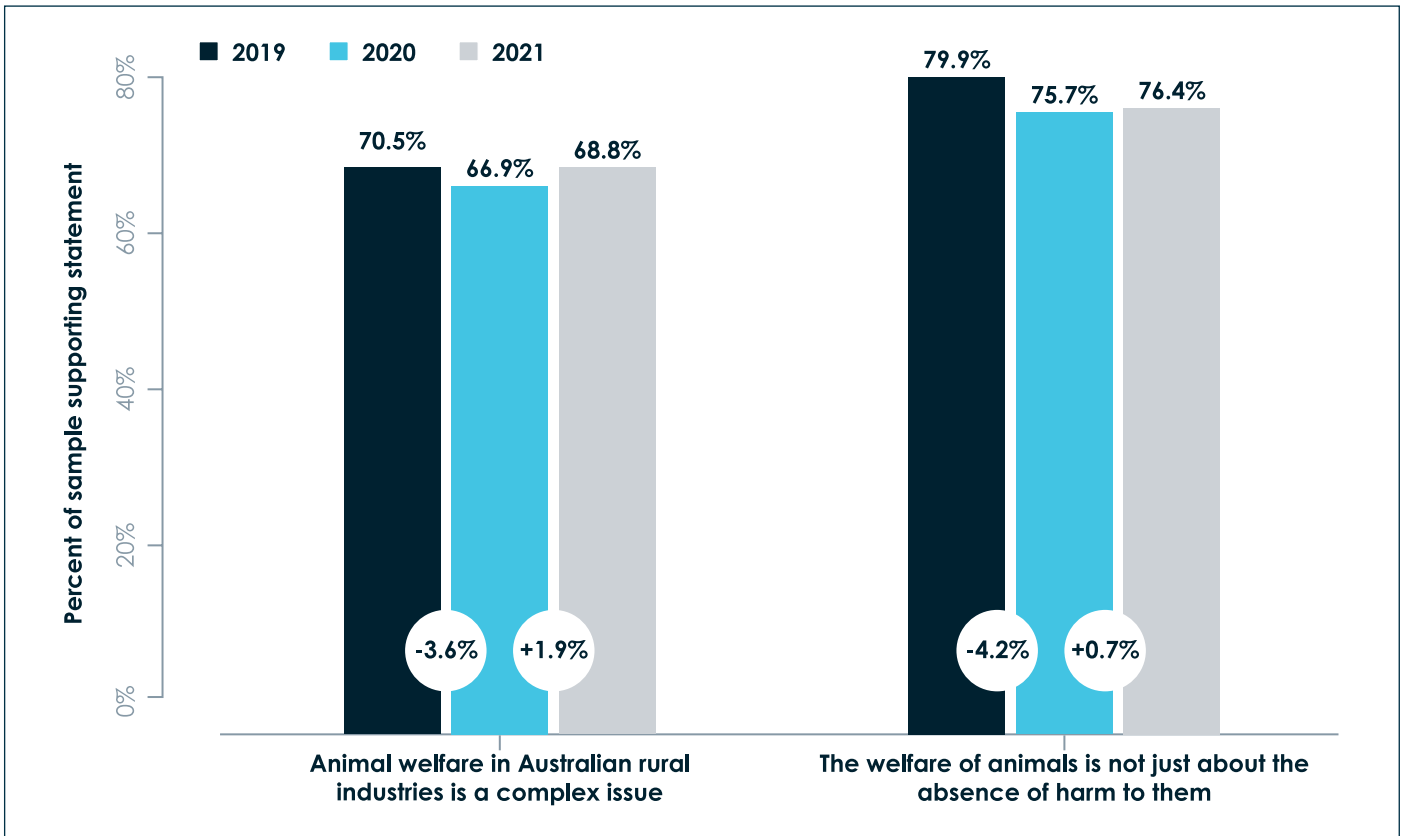


Figure 9. Proportion of agreement with animal welfare questions, Years One to Three.

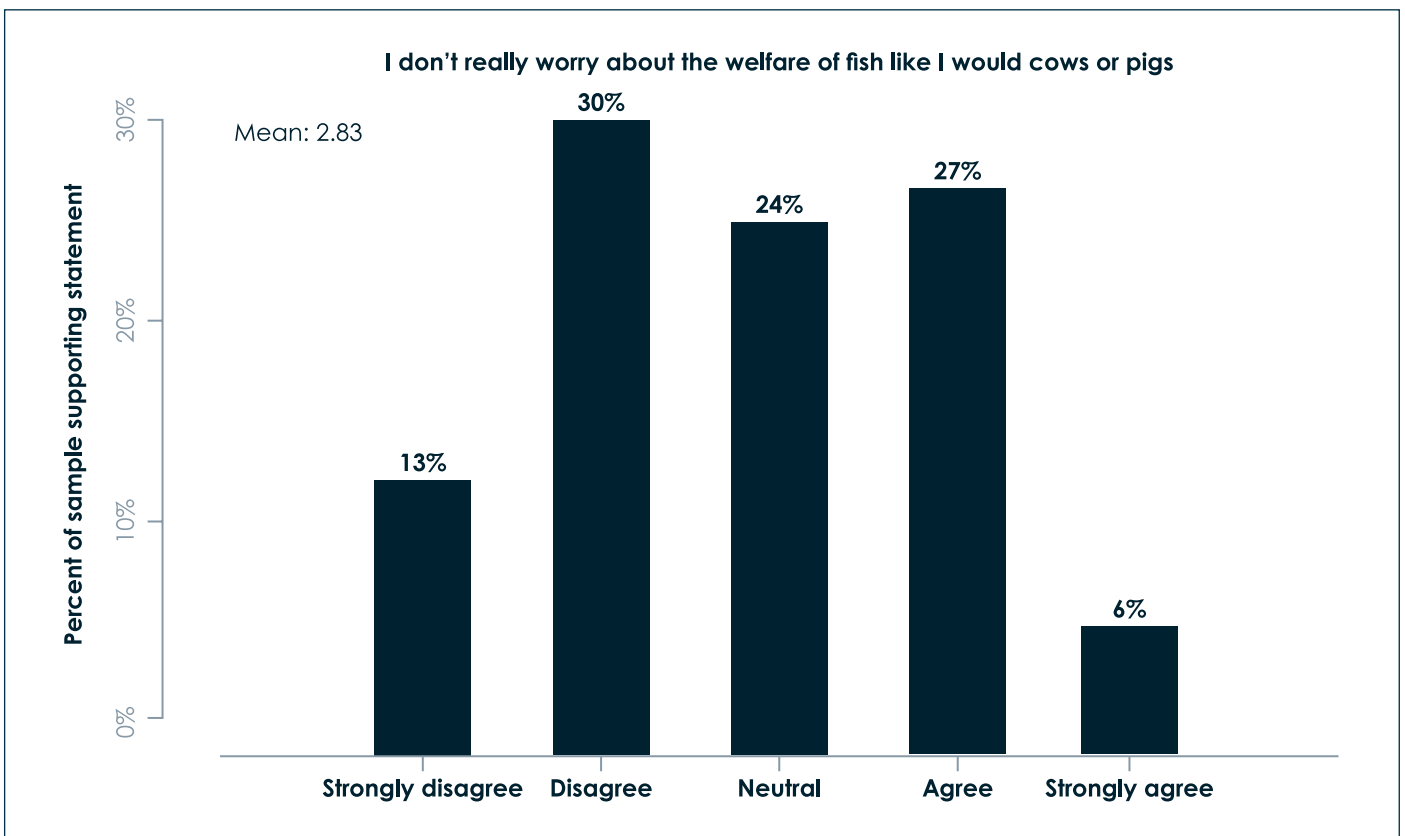
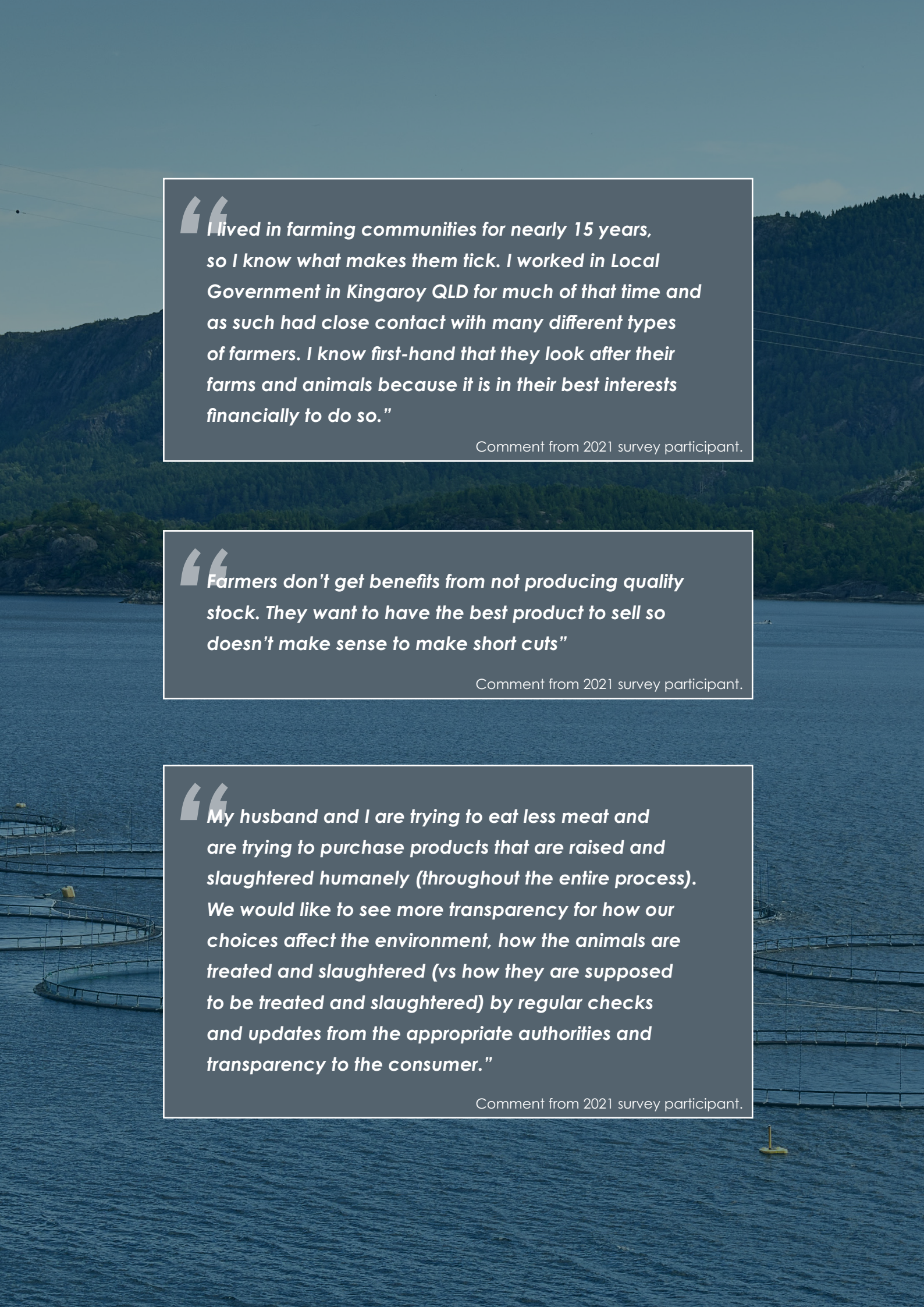


Figure 10. Distribution of scores comparing welfare concern for fish and cows or pigs, Year Three.



“ I lived in farming communities for nearly 15 years, so I know what makes them tick. I worked in Local Government in Kingaroy QLD for much of that time and as such had close contact with many different types of farmers. I know first-hand that they look after their farms and animals because it is in their best interests financially to do so.”

Comment from 2021 survey participant.

“ Farmers don't get benefits from not producing quality stock. They want to have the best product to sell so doesn't make sense to make short cuts”

Comment from 2021 survey participant.

“ My husband and I are trying to eat less meat and are trying to purchase products that are raised and slaughtered humanely (throughout the entire process). We would like to see more transparency for how our choices affect the environment, how the animals are treated and slaughtered (vs how they are supposed to be treated and slaughtered) by regular checks and updates from the appropriate authorities and transparency to the consumer.”

Comment from 2021 survey participant.

FOOD SAFETY AND CHEMICAL USE

The safety of food produced by rural industries in Australia is a key component of its value proposition for community members. Over the three years of the research program, we have seen confidence that “Food produced in Australia adheres to strict food safety standards” decline from 83.9% agreement in 2019 to 77.7% in 2020, and to 75.2% in 2021 (see Figure 11). While the level of confidence in food safety standards remains very high, the trend in this data is an area for rural industries to think carefully about in the context of its trust relationship with community members.

In comments left by participants, there is a link drawn between food safety and the use of chemicals by rural industries to support the efficient production of its products. While 45.6% of Australians in 2021 (see Figure 11) agree that “the use of herbicides and pesticides by Australian farmers is necessary”, 55.1% in 2021 also indicated agreement that “The use of weed control chemicals in Australian rural industries worries me”. This level of concern has been relatively consistent across the three years of data collection.

“I understand that farmers and fisheries and all producers and fruit producers have to do what they have to do to keep their produce going - I do wish that they would not use so much harsh chemicals ... they need to be careful of our coral and our land and our oceans in the production of their products”

Comment from 2021 survey participant.

TRADE-OFFS AND ALIGNED INTERESTS

We explored chemical use in some detail in this year's survey, seeking to tease apart the nuances in the challenges that Australians have with their use in rural industries. Starting with weed control chemicals like glyphosate, we asked participants about their support for its use “if it means that fresh produce in Australia is available and affordable”, “if it means that (farmers) can increase how much produce they can export”, and “if it means farmers can keep nutrients in soils by not ploughing them to plant new crops (i.e. zero-tillage farming)”.

Support for using glyphosate was stronger where it enabled better soil health (49% agreement, 39% neutral, and 11% disagreement), and more equivocal when it was focused on increasing production for export reasons (31% agreement, 35% neutral, and 34% disagreement) or making fresh produce more available and affordable in Australia (37% agreement, 35% neutral, and 28% disagreement).

Going further still, we asked participants to respond to the statement “I am more concerned about weed control chemicals getting into my food than I am about keeping soils healthy through zero-tillage farming”. On this measure, 42% agreed the concern about chemicals in their food was more important than soil health, while 22% disagreed and 36% were neutral.

Together, these new measures included in 2021 help rural industries to identify the location and nature of the challenge they face in balancing tools for efficiency with community concerns, and by extension how to engage Australians in meaningful conversation.

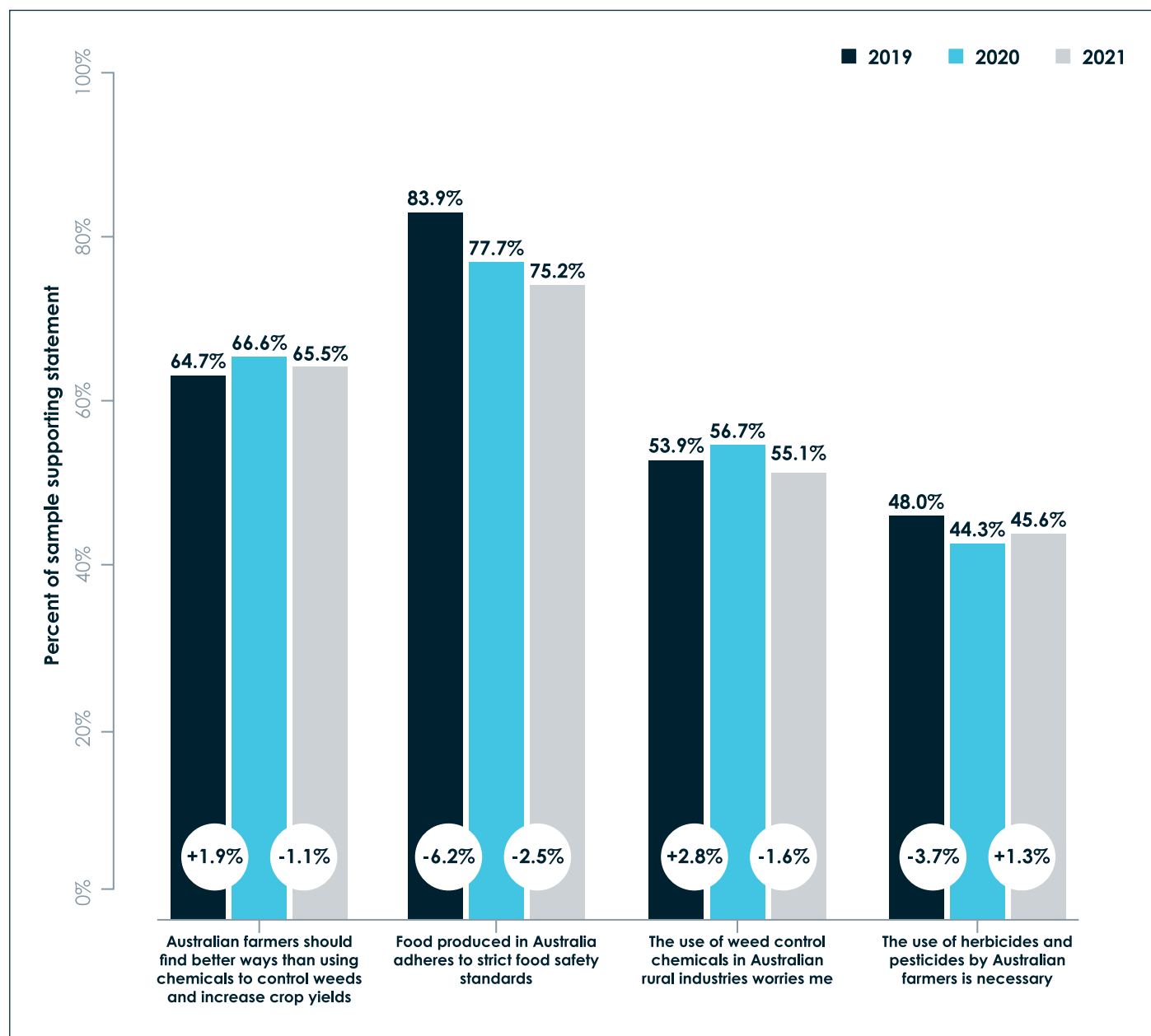


Figure 11. Proportion of agreement with food safety and chemical use questions, Years One to Three.

ACCOUNTABILITY AND SHARING BENEFITS

For most Australians, it is difficult to directly observe the way rural industries manage their responsibilities and ensure fundamental community expectations are being met. Regulation and industry standards are a key mechanism that holds rural industries accountable on issues that are important to Australians such as water use and animal welfare. Australian community confidence in these mechanisms are dynamic and have changed over the three years of the research program.

First, agreement that penalties for misusing natural resources in rural industries are not strong enough has declined in each year of the work since 2019 (see Figure 12). However, there are large numbers of Australians responding with neutral on this item (approximately 40%), indicating a lack of awareness for how these penalties are administered and under what conditions.

Second, agreement that "Standards developed for rural industries in Australia ensure people in those industries do the right thing" has declined from 71.9% in 2019, to 66.0% in 2020, to 63.6% in 2021. While confidence remains high, this trend is an area for rural industries to focus on.

Finally, we asked participants to rate the extent to which they feel that "State and Federal governments are able to hold rural industries accountable". The pattern of agreement ratings in each of the three years of the research closely reflect the way trust and acceptance of rural industries have changed over this period, with an increase in agreement between Year One and Two, and a modest decline in Year Three.

We also explored the extent to which Australians feel they receive a fair share of the benefits from rural industries in Australia, and the extent to which they feel regional communities receive a fair share of these benefits. Results for both have remained consistent over time, with approximately 55% of Australians in agreement for national benefit and 48% among regional communities (see Figure 12).



Farmers in general know the best way to keep their land viable and their animals in good condition. The Bureaucrats and politicians have no idea and should take advice from people who do know - farmers."

Comment from 2021 survey participant.



Seems that there are bad actors that exploit workers and cheat subsidies and other systems... they should be shut down"

Comment from 2021 survey participant.

“ I grew up in the farming industry as a child and saw the hardships faced in the dairy industry 30 to 40 years ago, I can only imagine how hard it is today for the people trying to make a living from the industry. Big companies ... should be looking after and compensating our local industry more so that we can sustain the industry in Australia. My fear is that one day in the future we will not have a locally owned produce industry and will be at the mercy of large companies who only think about profits and not about providing for local communities and local livelihood”

Comment from 2021 survey participant.

“ I find it interesting, other than pink salmon I would not really know if the fish I buy is actually the fish species as advertised. We certainly put a lot of trust in our fishing industry to do the right and honest thing for all Aussies.”

Comment from 2021 survey participant.

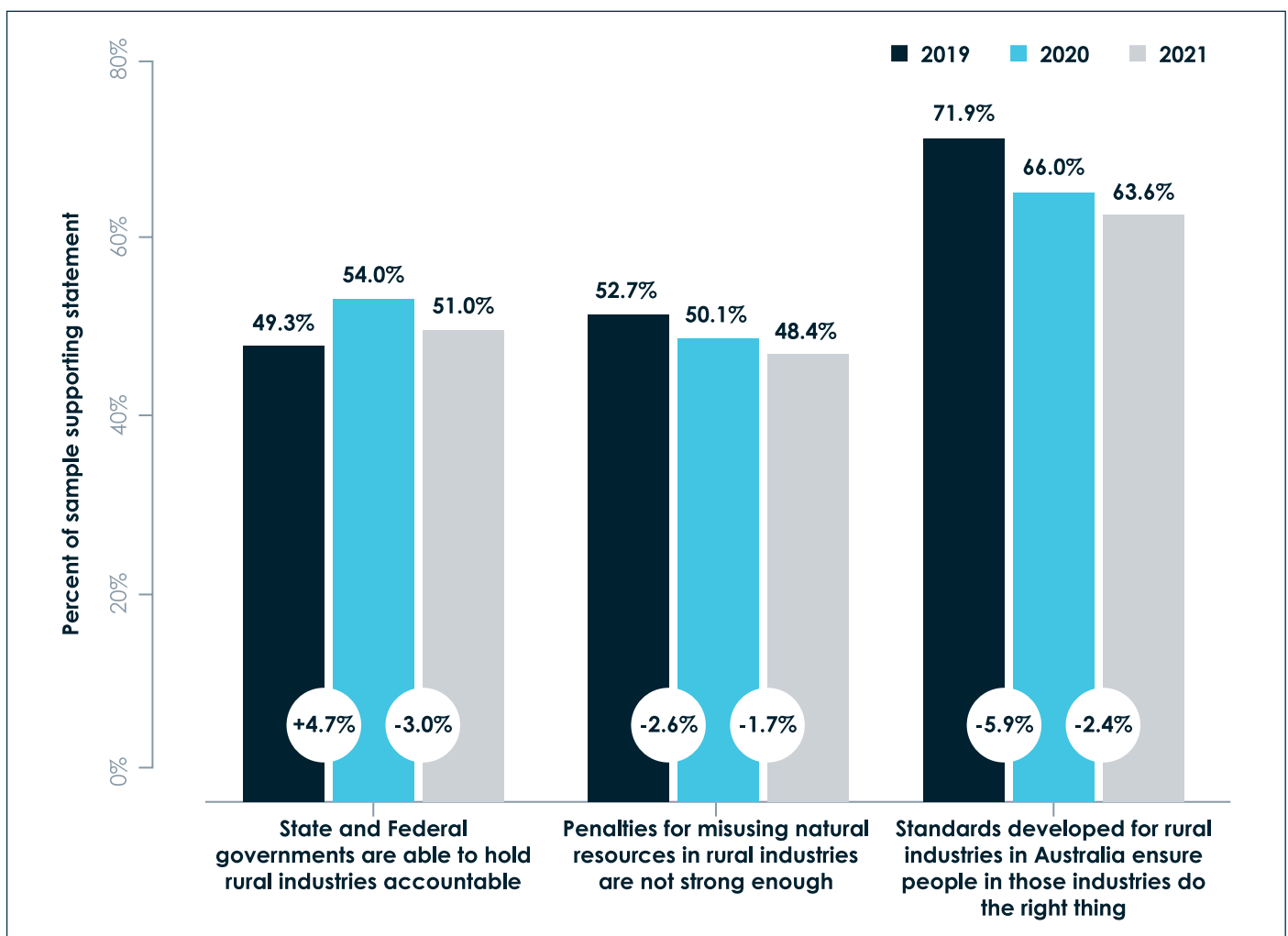


Figure 12. Proportion of agreement with governance and regulation measures, Years One to Three.

TRADE-OFFS AND ALIGNED INTERESTS

There are many mechanisms and incentives that shape industry behaviour, and we explored some of these in additional questions related to ethical rural industry behaviours. We asked participants to rate their agreement that “Government regulations mean the best business for rural industries is usually the most ethical”, with a modest 43% of Australians in agreement, 40% neutral and 17% in disagreement with this statement.

When we asked this question in reference to “Demand from consumers for ethical produce means farmers are incentivised to act ethically”, agreement increased to 59%, with neutral responses at 31% and just 10% in disagreement. When we asked participants the extent to which they agreed “Demand from consumers for ethical produce means ethical behaviour is profitable for farmers”, we found similar results with 57% in agreement, 34% neutral and 9% in disagreement.

Together, we can see that Australians see greater power in their own consumer-based choices in shaping behaviour within rural industries than government regulation. This also highlights that Australians themselves see the responsibility for ethical choices by rural industry participants being in part dependent on their own positions as expressed through choices at the supermarket.

Together, these new measures included in 2021 help rural industries to identify the location and nature of the challenge they face in balancing tools for efficiency with community concerns, and by extension how to engage Australians in meaningful conversation.

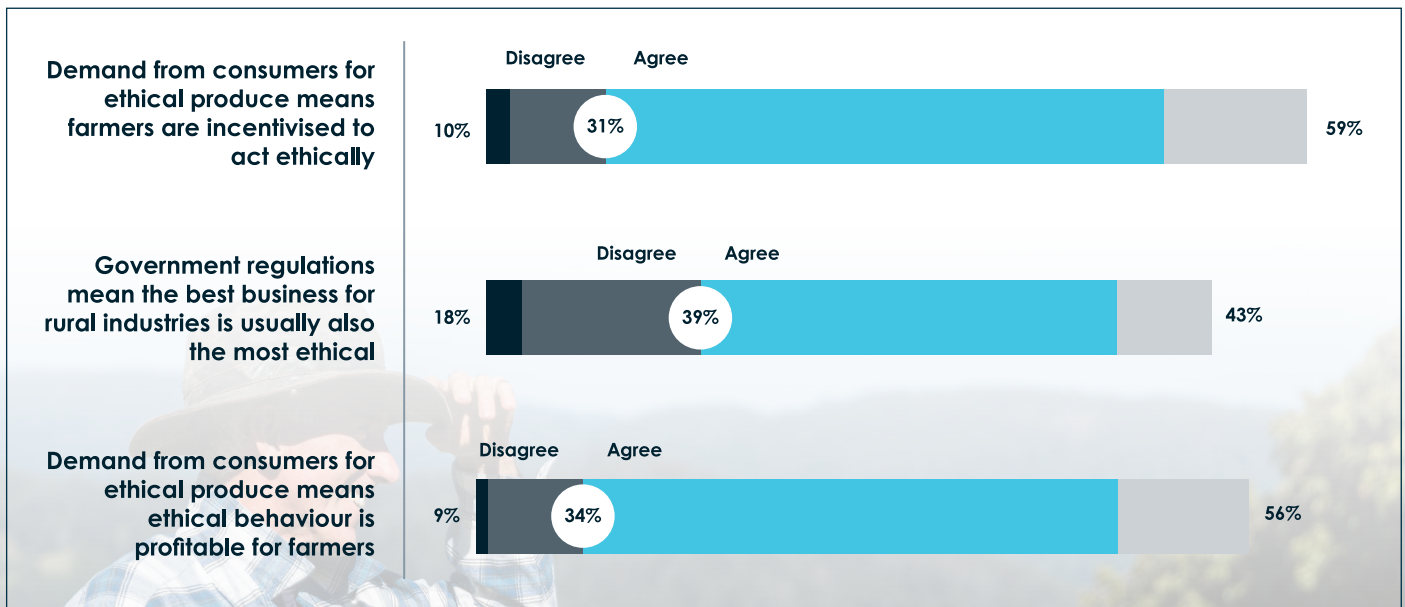


Figure 13. Proportion of agreement with governance and regulation measures, Years One to Three.

THE PATHWAYS TO DEEPER COMMUNITY TRUST

A central reason for this program of work has been to identify and support Australian rural industries to focus on the issues that positively influence community trust in and acceptance of their industries. In each year of the research program, we have used a statistical method called Path Analysis⁶ to determine a pathway to deeper, more constructive relationships between rural industries and the Australian community.

PATHWAYS TO TRUST AND ACCEPTANCE

In Year Three, the model for trust and acceptance is more complex than it was in Years One or Two. While the same two strongest drivers of community trust in rural industries remain as important as they were in previous years, in Year Three there is now a larger group of 'second tier' trust drivers of relatively equal importance in predicting trust. In summary, the Year Three modeling shows that environmental responsibility and industry responsiveness are the chief drivers of trust in rural industries. An additional group of six factors were found to be secondary, yet still important, drivers of trust.

THE ROLE OF TRUST

TRUST DRIVES ACCEPTANCE

Acceptance of rural industries is included as our key 'outcome variable' because it represents the end product of work within the relationship between rural industries and the Australian community. When acceptance is low, an industry is at risk of community rejection, with consequences including government action (e.g. a moratorium on its activities, stronger regulation), consumer boycotts, and legal action by concerned community members and advocacy groups. Where acceptance is strong, however, an industry can speak with authenticity that it acts in line with community expectations, enjoying the benefits of greater freedom to operate and lower risk for investors and industry participants. In this data, the chief driver of increased acceptance of Australia's rural industries is trust in rural industries to act responsibly.

TRUST IS A VEHICLE

Trust can be seen in the path model as central, located between community acceptance on the right and issues of importance to community on the left. This means that trust acts as a 'vehicle', translating community expectations and experiences into their level of acceptance of Australia's rural industries. As trust increases so does the level of acceptance. Trust is fundamental in relationships between industries and community because it creates room for innovation, for benefit of the doubt when things go wrong, and confidence in the products farmers, fishers and foresters produce.

⁶A primer on Path Analysis may be found at: <https://www.thoughtco.com/path-analysis-3026444#:~:text=Path%20analysis%20is%20a%20form,two%20or%20more%20independent%20variables.>

'TIER ONE' TRUST DRIVERS

ENVIRONMENTAL RESPONSIBILITY

In Year Three, as in the previous two years of research, environmental responsibility was the strongest driver of trust in rural industries. This consists of a group of questions reflecting community expectations that rural industries manage their environmental impacts effectively and operate in a sustainable manner. This combined measure included questions about responsible use of water, effective management of environmental impacts, commitment to working in a sustainable way, placing long term environmental stewardship ahead of short-term profits, and being responsible stewards of the land and sea.

INDUSTRY RESPONSIVENESS

The second strongest driver of trust in each of the three years was industry responsiveness. There are several components to this measure, including listen to and respect community opinions and that rural industries are prepared to change their behaviour in response to community concerns. When industries listen to concerns and respond appropriately, in ways that demonstrate they have heard these concerns, deeper community trust results.

'TIER TWO' TRUST DRIVERS

IMPORTANCE OF RURAL INDUSTRY PRODUCTS

When Australians feel that Australian rural industry products are of high quality and serve an important function in our lives, they trust rural industries more. In addition, these products serve an additional purpose for many Australians, helping them to feel connected to the people that made them; as this sense of connection increases, so does trust in rural industries.

A FAIR SHARE OF THE BENEFITS

The more that Australians feel that the country and regional communities get a fair share of the benefits that flow from rural industries, the more they trust rural industries. For rural industries this represents real opportunity to demonstrate how they contribute to resilient, thriving regional communities as a trust building strategy, particularly in light of the challenges they have experienced in the last several years.

CHEMICAL USE

Chemical use in rural industries represents a concern for many Australians, particularly with respect to food safety. The more concern Australians have around chemical use in rural industries, the less they trust rural industries.

ANIMAL WELFARE

The way animals are treated in rural industries is acknowledged by many Australians as a complex and challenging issue. The more community members feel that farmers treat animals with dignity and respect throughout their lives, the more they trust rural industries more broadly.

CONFIDENCE IN REGULATION

When community members feel that rural industries are being held accountable by governments, regulations, and standards of practice, their trust in rural industries is higher. This may be seen as a measure of the extent to which community members feel their interests and expectations of rural industries are being met through these more formal instruments of influence.

KNOWLEDGE OF THE CHALLENGES RURAL INDUSTRIES FACE

The more that community members indicate they understand the challenges rural industries face (e.g. managing through drought, navigating the complexities of welfare management, balancing the need for fertiliser use with the potential consequences of runoff), the more they trust rural industries. Our work in this area shows that the more people working in rural industries that community members know personally, the higher their level of self-reported understanding and therefore trust.

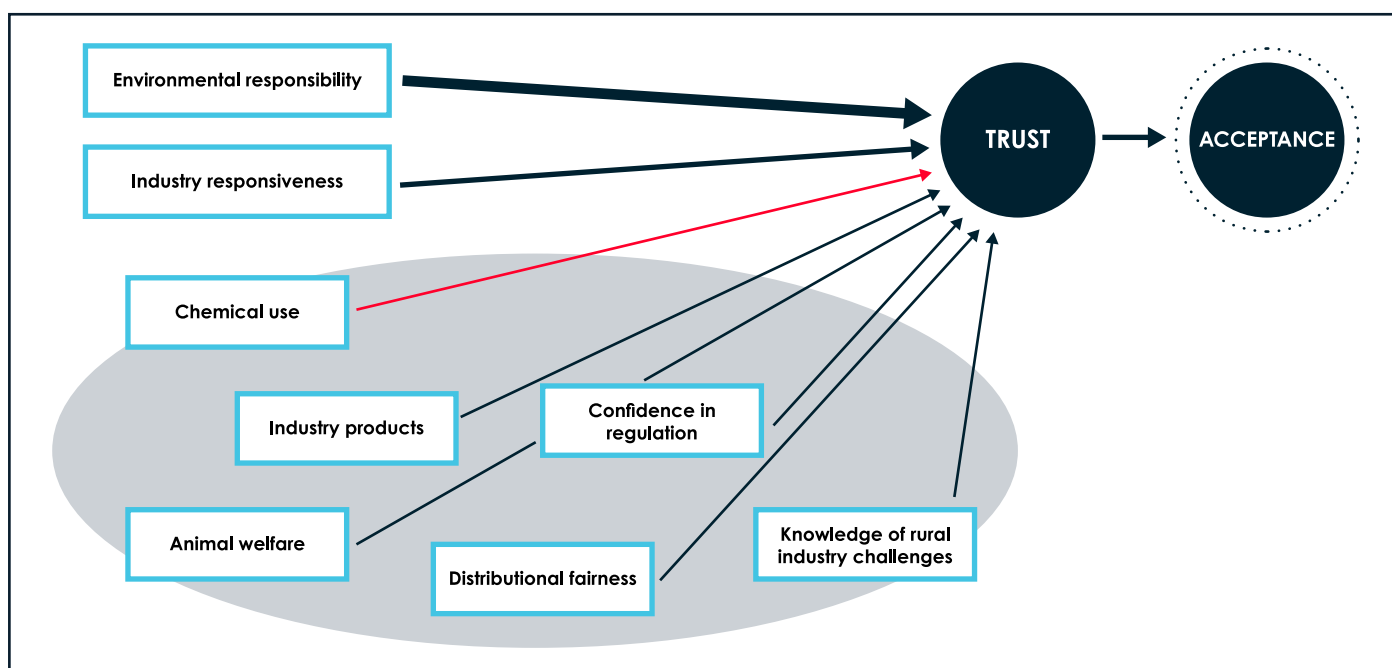


Figure 14. Pathways to trust and acceptance of Australia's rural industries

HOW TO READ THIS PATH MODEL

When reading the path model on this page, follow the arrows from left to right. The direction of the arrow indicates the direction of the relationship (e.g. trust leads to acceptance). The width of the arrows denotes their importance in predicting the measure they point at; thicker arrows represent stronger relationships. Black arrows represent positive relationships between measures (e.g. greater confidence in regulation leads to higher trust) and red arrows represent negative relationships between measures (e.g. greater concern about chemical use leads to lower levels of trust). All pathways in this model are positive, meaning the more responsive that participants feel rural industries are, for example, the more trust in rural industries they have.

“As a farmer, I look at the diversity of the farming trade. But what people do not understand, are what issues that the farmers have to put up with. It's not just having stock in the paddocks; it's the health of the animals, the feed that are available, clean water, shelter from server storms. The running costs to keep the place operating, repairs and maintenance issues with machinery, fuel costs and any other associated costs...”

Comment from 2021 survey participant.

CONCLUSION

The Community Trust in Rural Industries program of research is a unique multi-industry collaboration to understand, track, and build community trust. Over the three years of work, almost 20,000 Australians have participated, projecting their voices into the heart of rural industry decision making. The longitudinal nature of this research has provided a rich set of data, illuminating the dynamic nature of community sentiment, the pathways to deeper trust in and acceptance of rural industries, and the challenges that rural industries must continue to focus on.

KEY FINDINGS

Across the three years of this research, we have shown that trust in and acceptance of rural industries is strong and stable. This is an opportunity rather than an endpoint or reason for complacency. Trust in this relationship allows rural industries to approach challenging issues with the confidence that acceptance is not in jeopardy. Addressing challenging issues (e.g. chemical use or animal welfare) requires rural industries to embrace a level of vulnerability that can be difficult. However, broadening and deepening these conversations is a clear demonstration of industry responsiveness, a key, enduring driver of community trust in rural industries.

We have also seen across the three years how trust operates in this relationship between rural industries and the Australian community. Our data modelling has shown that trust is a vehicle that translates community expectation into acceptance and tracking these key measures over time shows that trust acts as a lead indicator of community acceptance. Focusing on trust, and the actions that drive it within the community, is a sound strategy for mitigating risk through stronger community relationships.

Industry responsiveness is a key driver of trust, and community members have also indicated they feel positively that rural industries are listening and will make appropriate changes in line with community concerns. It is important to think about this finding in the context of issues where community members have expressed concern. In particular, those issues that relate to industry environmental management and sustainability.

As the consistently strongest driver of trust over the three years, the extent to which rural industries manage water, make choices that preserve the natural resources they use for future generations, and minimise their impacts matters. On some measures, we have seen concern for the environment ease since the onset of COVID-19 when community members are prompted to consider sustainability choices in the context of employment and economic sustainability of rural industries. While this acknowledges the practical interconnection of these issues, community members retain a fundamental expectation that rural industries operate in sustainable ways.

With respect to water use, again a broader contextual feature is likely to have influenced community sentiment, with the onset of the La Niña weather event coinciding with general reduced levels of concern about water allocations and use. Again, rural industries may look to this as an opportunity to engage community in a deeper conversation about the way water is managed in Australia while the focus is less intense rather than seeing this as an opportunity to avoid a challenging topic.

Views of Australians have not changed on the extent to which environmental management is seen to be a shared responsibility among all rural industries. This has remained a very strong sentiment among participants in each of the three years of the research.

The 2021 data also elevated a range of issues to greater prominence in the data modelling, with chemical use, animal welfare, and confidence in governance now equally important drivers of trust alongside distributional fairness and the value of industry products.

Chemical use has been shown to be an area of particular challenge for Australians over the course of this work. Critical for efficient crop production, there is a deep concern among community members that this may have negative health effects if ingested. In the 2021 research, we explored this concern in more detail, presenting participants with questions that explored the different uses of herbicides like glyphosate in agriculture. Community members were more supportive of the use of chemicals where it enhanced sustainable soil management practices than when it was framed as a way to increase production for export or domestic consumption.

On animal welfare, we observed consistent community sentiment across time that welfare is a complex issue and involves more than just the absence of harm for animals. The bar is high for rural industries that involve animals, although community members also understand that welfare is not a simple issue to manage. New questions included in 2021 also revealed that community members concerns and expectations around animal welfare are often well aligned with those of people working in rural industries. However, there is work for rural industries to address a perception that financial sustainability may encourage farmers to "cut corners" on welfare.

Finally, it is compelling in light of recent federal election results that public confidence in rural industry regulation and governance is an important driver of community trust, albeit of lower strength than environmental responsibility or responsiveness. We have found confidence in governments at state and federal levels to change in line with ratings of trust in rural industries over the three years. This highlights the connection that community members make between their interests and the strength of governance mechanisms.

Community members have declining confidence that standards developed for rural industries ensure they do the right thing although there is also declining sentiment that penalties for the misuse of natural resources by industries are not strong enough. Building public confidence in the mechanisms of accountability for rural industries is an important way to build community trust in rural industries.

Australian rural industries embarked on this research program in 2019 committed to the development of a deeper understanding of the role and drivers of community trust in their respective industries. Community sentiment that environmental management is a shared responsibility and the central role that this plays in driving trust in rural industries is validation for this collaborative approach. It also speaks to the pathway forward for rural industries to deepen this relationship with the Australian community further. This work has shown that the risks and opportunities of community expectation in this relationship are not constrained by what crop or product is created, but by the capacity of rural industries to foster a collective approach to the issues that contribute to community sentiment where appropriate, and to develop industry-level strategies that clearly speak to this broader commitment.



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