

Community sentiment (Voconiq)

We have completed the third survey of community sentiment toward the livestock export industry – the report is due to be published in coming weeks.

This research program represents the largest, most authoritative, and most comprehensive dataset on Australian attitudes toward this industry available.

The majority of questions have been repeated, to allow a comparison across years. We have also introduced new questions to dig deeper into some of the previous findings and topical issues.

Community sentiment survey #3 results (2023)

lot of people not aware or not engaged.

Highlights:

- The livestock export industry is seen by Australians as an important part the agricultural sector.
 - When asked if “farming communities would suffer economic hardship should the livestock export industry discontinue”, agreement has increased from 67% in 2019 to 78% in 2023.
- We asked participants directly whether “live exports should be stopped regardless of the impact on farmers”. Just under a third (29%) agreed with this statement in 2023.
 - However, 42% disagreed with this statement in 2023 – up from 37% in 2019 and 36% in 2021.
- Agreement that “conditions for animals on live export ships are not in line with Australian animal welfare standards” decreased by 14.7%, from 53.7% in 2019 to 39% in 2023.
- 64% agreed that the industry supports the diet and nutrition to people overseas – increasing substantially from 55% in 2019.
- Six questions asked about livestock export generally were adapted to examine attitudes toward the export of sheep, specifically. There was no significant difference in the two sets of answers.
 - *(Note: the sheep specific questions were asked right at the end of the survey, to make sure they could not influence the standard set of questions.)*

Background

In 2019, LiveCorp commissioned a project to investigate the drivers of trust in the livestock export industry. This is now being funded by the LEP RD&E Program.

We’re using a social-science approach to conduct surveys of 4,000 to 5,000 Australians matched to ABS population data for age, gender and education.

The results have helped the industry understand Australians’ concerns, identify the key areas where action will make the biggest difference, and re-set the conversation industry is having with the community.

The aim is to increase the level of acceptance and trust in the industry in each survey.

The findings now factor into planning – for instance LiveCorp’s website content, research priorities, and development of the Strategic Plan 2025.

Community survey 2 results (2021)

The results of the first survey show that *some* people are very concerned, and we will never change their minds. However, there are many others that either support the industry ... or don't feel they have enough information to form a strong opinion either way.

We weren't surprised to find that animal welfare was a key issue, and there can be no compromise on that for many people. People want to know what happens on the ships, and when the animals arrive at their destination.

However, people also recognise the contribution of the industry to providing safe and affordable nutrition in many countries, and to employment and prosperity in rural and regional Australia.

It's really clear that people want to know there's strong regulation in place, and that industry is responding to community concerns.

Why are you wasting more money – the industry still hasn't shown any improvements based on all the other surveys over the years, and your social licence hasn't improved!

- This project is much more than "what do you think of the industry?" – it is digging into WHY people think that way.
- The project is helping us to re-shape the conversation with the community, by identifying areas of common values, and parts of the industry where people are looking for more information.

What is Voconiq's approach?

- The survey instrument is nuanced and allows examination of complex issues like animal welfare from multiple perspectives.
- It uses a Likert-type scale (1 to 5) rather than binary measures, and a mixture of positive and negatively worded questions.
- Ensures data quality through rigorous data cleaning and screening processes to ensure findings are accurate and genuine.
- Analyses the data in ways that go beyond what people think, to understand why they think that way (path modelling).
- Voconiq speaks about the data in ways that reflect expertise and do not advocate for an industry or criticise it – their job is just to report the findings and offer points of reflection or recommendation for how to progress toward that more constructive relationship.
- Voconiq has used this approach for dozens of industries in more than a dozen countries and has engaged more than 200,000 community members.

Potential Q&A

Strategic Plan 2025 imperative 4 states: *Contribute materially to a growing acceptance of the livestock export industry within the community; to the industry's ability to present its case; and to the ongoing development of a world-leading regulatory framework for the export of livestock.*

In order to address the terms of clause 4 you need a starting point – that is the current view of the live trade in the community. Has that work been done and what were the results.

- CSIRO spin-off Voconiq was commissioned in 2019 to conduct a series of surveys. This research program represents the largest, most authoritative, and most comprehensive dataset on Australian attitudes toward this industry available.
- The third survey was conducted earlier this year – and the report is due out next week.
- Across the three surveys, sentiment toward the industry has strengthened. The community recognises the value of live exports to regional communities and the Australian economy; and to families overseas through increased nutrition and knowhow. While animal welfare remains a critical issue for the industry, concern has eased across the three surveys and the majority of respondents agree that animal welfare is complex.

There have been breaches of the rules in this industry which have been unacceptable but also damaging for this industry. But there has also been a number of examples where groups have distorted, misused or fabricated images of the treatment of [allegedly] Australian animals to damage this trade. What misinformation about the live trade has shown up in your research.

- The community sentiment research is about people's perceptions of the industry. You don't have to know how something works to have an opinion on it.
- Voconiq have asked people to guess mortality rates on a sheep shipment to the Middle East, from five options. When presented with the correct figure, more people thought the reality was lower than expected... than the number thinking it was higher.

A complex relationship

There remains a lot of uncertainty amongst Australians on key questions about live exports.

Animal welfare in the live export industry is a complex issue.

6% disagree



Australia should stop exporting animals overseas regardless of the impact on Australian farmers.



How much trust do you have in the live export industry to act responsibly?



How do you feel about the costs and benefits of the live export industry?



Concern about conditions on ships is easing

While the voyage overseas was selected most by people expressing concern about animal welfare along the supply chain, overall Australians are less worried about conditions on ships.

Conditions for animals on live export ships are not in line with Australian animal welfare standards.



When provided with the actual average mortality rates in 2020 for sheep and cattle on ships, participants indicated they were:



About the live export project

The live export industry is conducting multiple surveys of Australians to gain a representative sample of community views on a broad range of topics relating to the industry and support a more constructive conversation. This fact sheet outlines the results from the second survey in 2021, with comparisons to the first survey in 2019.

Survey responses were collected via an online research panel of Australians over the age of 18, matched to Australian Bureau of Statistics population data by age, education and gender. Analysis was conducted on 4,830 responses in 2019 and 4,411 in 2021.

The project is being funded by LiveCorp and Meat & Livestock Australia, the service providers and research bodies for livestock exporters and producers respectively. The research is being conducted by Voconiq, an Australian data science company built on a platform of research developed by Australia's national science agency, CSIRO.

For further information please contact Kaaren Latham, LiveCorp Communications Manager, on 0409 809 909.

Community Trust in Rural Industries

LiveCorp and MLA are also partners in the Community Trust in Rural Industries Program, a cross-sector initiative involving 11 Rural Research and Development Corporations, the National Farmers' Federation and the NSW Department of Primary Industries, to build the capacity of food, fibre and forest industries to productively engage with the community.

The Program is examining the issues impacting on rural industries and how these industries relate to each other in the minds of community members. It involves community research over a three-year period, also by Voconiq, sampling more than 6,000 Australians each year to provide insights on cross-sector issues and best practice approaches.





LIVECORP
THE AUSTRALIAN LIVESTOCK
EXPORT CORPORATION



Live exports – exploring the drivers of trust

MARCH 2022

The live export industry has commissioned national surveys, two years apart, to identify the issues that matter to the Australian community and start a fresh conversation about how it is responding to those concerns.

The value of live exports

There is even greater recognition among Australians that

Live exports make an important economic contribution to Australia.



Live exports help overseas countries ensure their citizens have access to safe sources of meat.



Pathways to trust in live exports

The key drivers of the community's trust in live exports are:

