

Live Exports and the Australian Community 2019-2023

A National Program of
Community Sentiment Research

May 2023

CITATION

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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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INTRODUCTION

The live export industry plays an important role for many Australian businesses and livestock farmers. It also services a need within overseas markets to access livestock in ways that fit their cultural, market, and technological needs and capacities of export destinations. The live export industry maintains very low animal mortality rates and two distinct regulatory frameworks, but despite this it faces increasing scrutiny.

There are multiple groups that have strong views on the live export industry, all representing important, legitimate constituencies. In this research program, we seek to provide clarity and depth of understanding regarding a critical constituency that is often spoken about, but not with, regarding live export: the Australian community.

The research reported here seeks to inform broader understanding of what Australians think about live exports, animal welfare within the livestock industry in general, and the export of sheep by sea specifically; we seek to bring the voices of the Australian community directly into the conversation in a systematic, robust way.

This is particularly important in the current industry context. The Australian Government has committed to phase out live sheep exports by sea. At the time of writing this report, the Department of Agriculture, Fisheries and Forestry (DAFF) had undertaken a process of community consultation in regional communities, and via virtual public meetings through an independent panel "established to consult with impacted and interested stakeholders" to inform the timing and nature of this phase out. ¹

This report details the findings of the third in a series of national surveys of Australians since 2019. The research examines animal welfare as part of a broad,

comprehensive examination of the industry value chain through the eyes of Australians from across the country. This research program represents an authoritatively large and sophisticated accounting of Australian perspectives on these complex issues.

This includes path modelling of the survey data to provide clear, structured guidance for industry and others on how the relationship between the Australian community and the live export industry may be deepened, the terms of its acceptability in Australia, and the current components of its value proposition among the Australian community. With three national surveys completed since 2019, we are also able to present trends in community sentiment data across time.

The service provider for the Australian live export industry, LiveCorp, initiated the project, and was joined by its counterpart for livestock farmers, Meat & Livestock Australia in 2021 through the Livestock Export Program which they jointly fund. Together, these industry bodies have invested in bringing the voice of community forward to inform both their practices, and the broader discourse regarding an industry that supports the livelihoods of many Australians and meets important needs in destination markets.

¹ Department of Agriculture, Fisheries and Forestry. (2023). Have your say-phase out of live sheep exports by sea. Retrieved May 15, 2023 from <https://haveyoursay.agriculture.gov.au/live-sheep-phase-out>.

ACKNOWLEDGEMENTS

This program of work is funded by the Livestock Export Program, a collaboration between the Australian Livestock Export Corporation Ltd (LiveCorp) and Meat & Livestock Australia (MLA), the not-for-profit industry service providers for livestock exporters and producers. LiveCorp and MLA acknowledge the provision of funding by the Australian Government and levy payers to support the research and development detailed in this publication.

This research has been conducted by Voconiq, an independent data science company.

THE RESEARCH PROCESS

Year one of the research program involved conducting an extensive industry stakeholder engagement process, desktop analysis of live export issues and media analysis to inform a baseline survey instrument. In years two and three, this survey instrument was refined to exclude items that were not helpful in explaining community attitudes and include new items that allowed us to drill deeper into key areas in the relationship between community members and the industry identified in year one. These refinements were also informed by extensive engagement of industry stakeholders with the year one data.

As in previous years, this survey was conducted online using a research panel. Survey participants were over 18 years of age and recruited from across Australia, including regional areas. No details of the content and subject of the survey were provided to participants prior to recruitment.

The main body of data for this third national survey was collected between 24 February and 23 March, 2023. Of the 6,235 surveys completed, 4,716 were included for analyses after data cleaning². Surveys

were removed where they did not meet inclusion criteria related to completion times, randomness of responding, or other criteria used to ensure statistical assumptions were met.

As part of a multi-year program of research, this report provides comparisons of responses from all three national surveys conducted to date. These surveys were conducted approximately 18 months apart, providing an excellent opportunity to see how community views may have changed in that time. It is also important to note that the Australian Government announced the consultation process on its policy to phase out live sheep exports after datacollection for this survey was completed.

²Data cleaning' 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.

WHAT DID WE MEASURE?

As with the previous research activities, the third national survey examined community attitudes toward a broad set of components in the live export value chain. There are multiple sources of animals, routes to foreign markets, and purposes that animals bred in Australia are used for in overseas countries. To add to this complexity, there are different regulatory frameworks within which the industry operates at different stages of this process. There is also a strong overlap between the live export industry and several other agriculture industries. The survey instrument sought to reflect as much of this breadth and nuance as possible.

As before, and following an information and consent process within the survey introduction, we included a comprehensive set of demographic measures.

The challenge for this year was to identify areas to improve on from previous years and respond to issues of relevance within the sector.

The intention of the report is to inform and direct conversations about live exports in the most meaningful way, drawing from a real understanding of the Australian community.

Topics and Issues included in the Community Sentiment Survey

- information sources
- Attitudes towards animal welfare, including knowledge of mortality rates on live export ships
- The position of agriculture, animal farming and live exports in Australia
- Different parts of the live export process
- Value proposition for the industry
- The extent of responsibility for animal welfare by exporters
- Confidence in regulation
- Industry responsiveness
- Trust and acceptance of the industry and associated stakeholders

Figure 2. Focus areas for 2023 live export survey

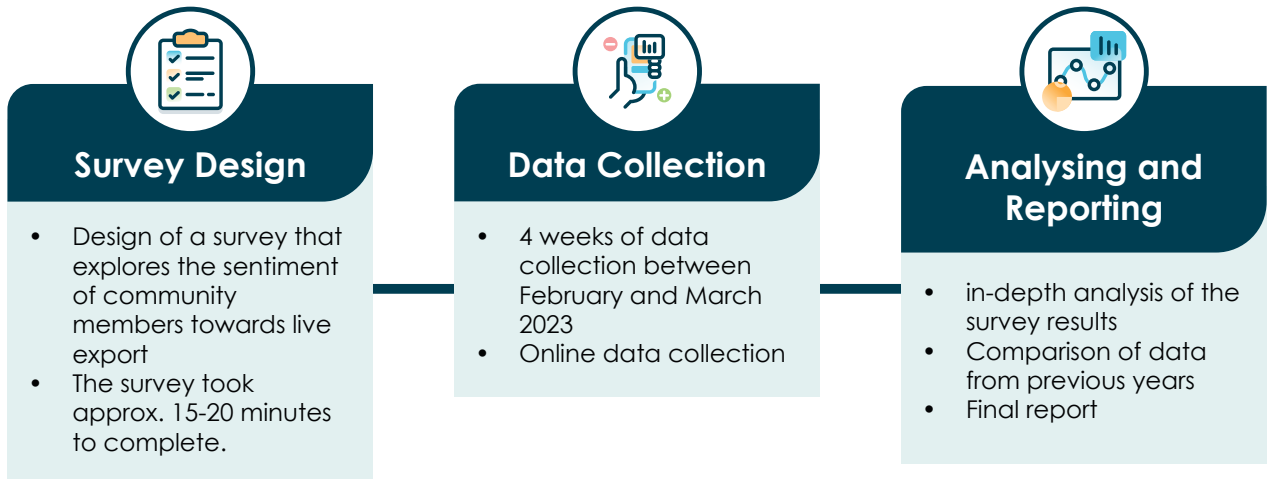


Figure 1. Voconiq research process



WHO COMPLETED THE 2023 NATIONAL SURVEY?

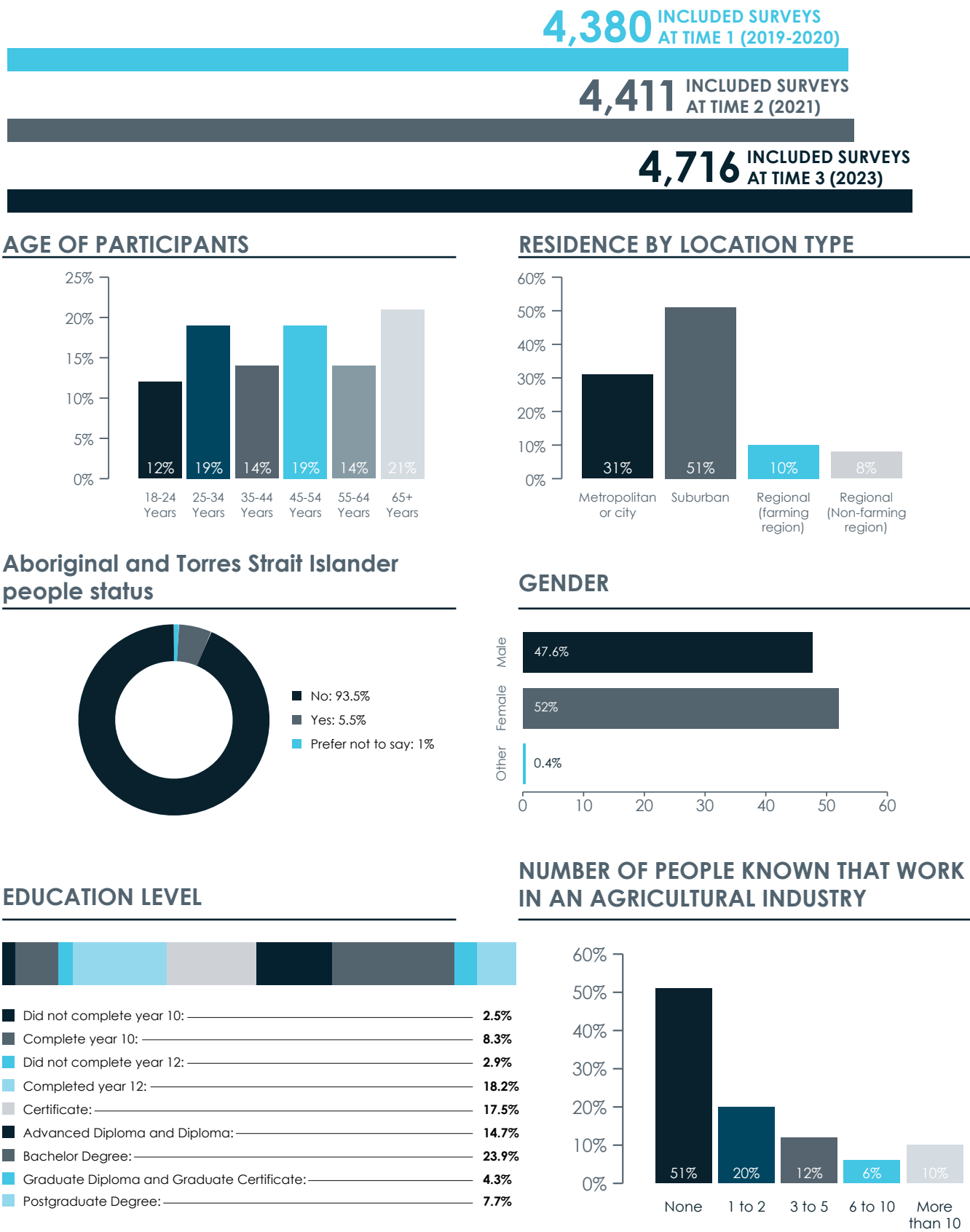


Figure 3. Demographic overview for 2023 live export survey

THE POSITION OF LIVE EXPORTS IN AUSTRALIA

One of the key aims of this program of work is to understand the position of the live export industry in a broader agricultural and economic context. The industry is often discussed with reference to single issues without considering the larger role it plays within Australia, or considering the multiple ways in which the industry may be perceived to deliver a range of economic and social benefits to this country, or citizens of countries where animals are exported.

CONTRIBUTIONS OF THE LIVE EXPORT INDUSTRY

The live export industry is seen by Australians as both an important part of the agricultural sector, and to deliver important economic benefits for the country. Examining the data since 2019 (see Figure 4), the proportion of participants that either 'agreed' or 'strongly agreed' with these statements has remained high and increased each year since 2019 (from 72% in 2019 to 79% in 2023 for economic benefits). The live export industry is seen to be part of the Australian

agriculture industry to a greater extent in 2023 than in past years (3.95 on a scale from 1 = Strongly disagree to 5 = Strongly agree), demonstrating a broader, modest positive shift in sentiment over time. Similarly, the average score in this most recent survey for economic benefits generated by the industry (4.03 on the same 5-point scale) remained high and increased slightly from previous years. Farmers producing livestock for export are also seen as playing an important role in Australian society, with 90% of participants in agreement with this sentiment in 2023.

There is strong agreement that the live export industry delivers real economic benefit for regional communities (see Figure 4), up to 78% agreement from 74% in 2019. And the industry is seen to provide important alternative markets for Australian farmers (68% agreement in 2023, up from 63% in 2019).

Australians also recognise that these farming communities would suffer economic hardship should the live export industry discontinue, with agreement on this measure increasing from 67% in 2019 to 78% in 2023.

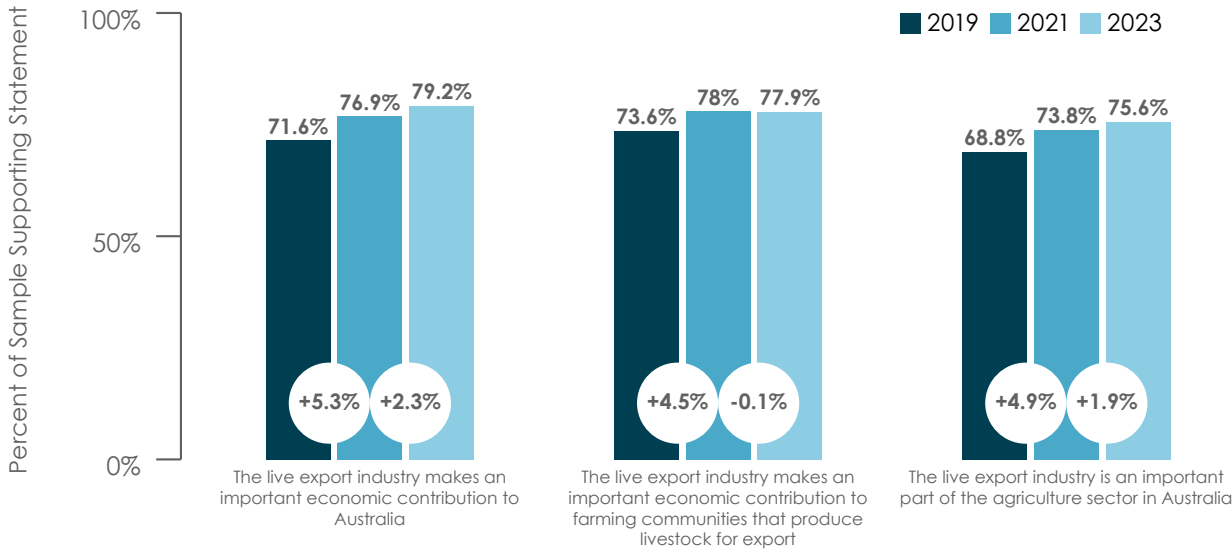


Figure 4. Ratings of agreement on economic statements 2019 - 2023

Finally, we asked participants directly whether live exports should be stopped regardless of the impact on farmers. Just under a third (29%, see Figure 5) of Australians indicated some level of agreement with this statement. However, 42% disagreed or strongly disagreed with this statement in 2023, increasing from 37% in 2019 that disagreed live exports should be stopped.

KEY INSIGHTS

In general, live exports are seen by Australians as an important part of the agriculture sector, and important for farming communities. The position of live exports, socially and economically, has improved over the last four years.

Australia should stop the export of live animals to overseas markets, regardless of the impacts on Australian farmers

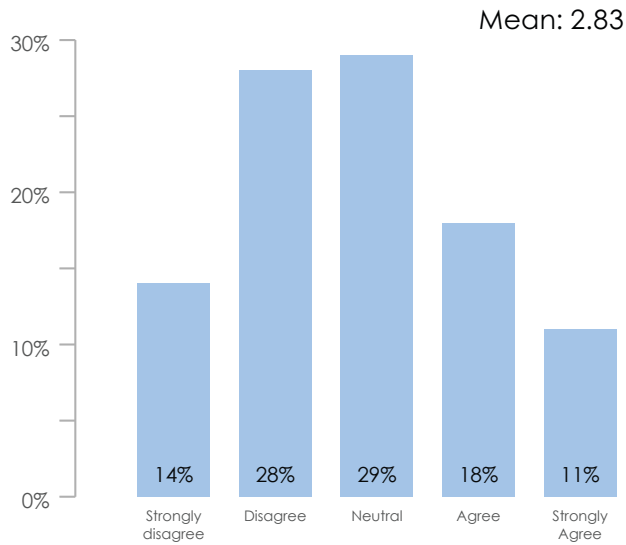


Figure 5. Ratings of agreement that live exports should stop regardless of the impact on farmers, 2023

TRUST AND ACCEPTANCE OF THE INDUSTRY

A key outcome measure for this work is the extent to which the Australian community trusts in and accepts the live export industry. Trust in the relationship between an industry and community is central to its social licence to operate, or the extent to which it meets the expectations of the Australian community as a whole and is accepted as a legitimate and appropriate industry in this country.

In 2019, the average trust rating for the live export industry overall was 2.91, on a scale where 1 reflects lower trust and 5 reflects higher trust. This score increased to 2.96 in 2021 and remained steady in 2023 (see Figure 6). That is, trust in the live export industry is around the middle point of the scale used.

In a means comparison in the most recent survey, the live export industry remains more trusted than the federal government (Mean (M) = 2.81), foreign governments which support the live exports of Australian animals (M = 2.54), and livestock exporters (M = 2.86).

As in the 2021 research, we explored the industry's supply chain, distinguishing between livestock farmers that do and do not supply animals for export. Trust in livestock farmers that do not supply animals for live export was only slightly higher (M = 3.44) than for livestock farmers that do supply animals for export (M = 3.38), with trust increasing for both groups since the last survey in 2021.

The average rating for acceptance of the live export industry in the 2023 survey was 3.01. This rating generally shows that more people accept the industry (36%) than do not accept the industry (33%), with a significant proportion indicating a moderate, neutral response (32%). As with trust, the proportion of participants accepting the live export industry increased from 2021 (33%).

THE VALUABLE POSITION OF THE LIVE EXPORT INDUSTRY

Several comments were made about the importance of the live export industry to the Australian economy and farmers.

- “It is an important and fundamental part of country and economy, the livelihood of our farmers, in terms of employment for Australians and many other factors.
- “Without it (Live exports) there would be job losses and some livestock farmers would go out of business.
- “The live export trade is good, well regulated and profitable export for Australia.
- However, several comments outlined concerns about how exports could impact domestic supply and price.
- “As an Australian meat consumer, I think all meat exported means less on the Australian market, sending up prices here, making my food more expensive.
- “I wish that meat was cheaper in Australia, and I hope that exporting live meat does not push the local prices up.
- “All our livestock here should be available to the consumer.



KEY INSIGHTS

The trends show that both trust and acceptance in the live export industry have increased modestly since this research began in 2019. This data also reveals interesting variations in how different parts of the industry are perceived, with rural industries not associated with live exports and veterinarians generally rated more highly with regards to trust, and government and associated groups rating lower.

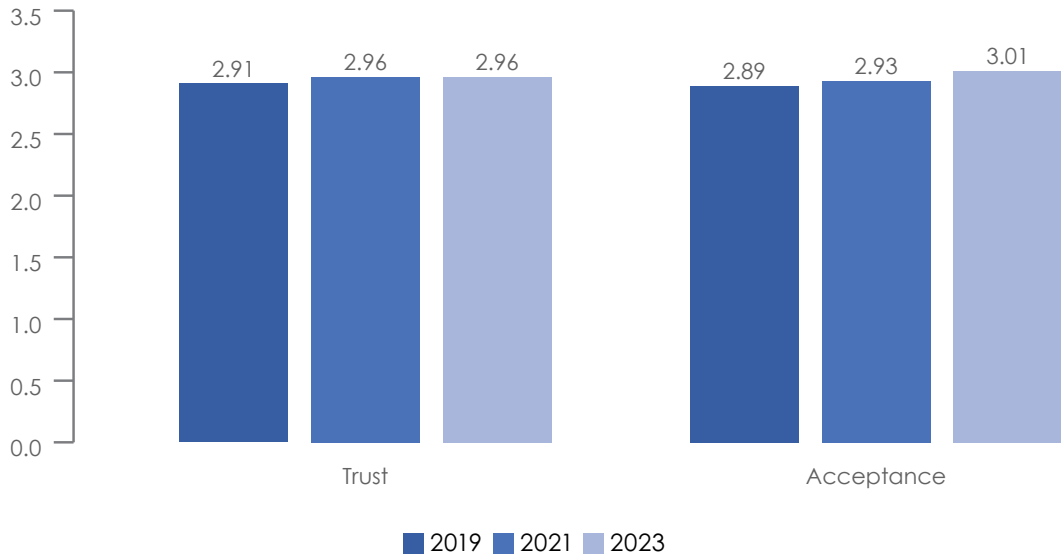


Figure 6. Trust and acceptance mean for the Australian live export industry 2019-2023

INDUSTRY RESPONSIVENESS

In the first national survey of community attitudes toward the live export industry, responsiveness to community concerns was found to be a strong driver of community trust in the industry. This measure has two main components that have been measured over time:

- the extent to which the industry is perceived to listen to and respect community opinions, and
- the extent to which it is seen to be willing to change its behaviour based on those community concerns.

In 2023, there was a slight increase in the proportion of the community that agreed or strongly agreed that the industry was willing to change its practices in response to community concerns, compared to 2021.

There was also a small increase in agreement recorded in 2023 that the industry listens to and respects community concerns. The average score for preparedness to change was above the mid-point of the scale used (M = 3.12; i.e. more people agreed

than disagreed with the statement), with a large proportion of participants indicating a “neutral” response (39%; see Figure 7).

The average score for listening and respect was also above the mid-point of the scale used (M = 3.03), with a large proportion of participants indicating a neutral response (42%).

KEY INSIGHTS

Combined, these findings show that perceptions of industry responsiveness are strengthening over time. Moreover, as we will see later, responsiveness was again a strong driver of trust in this year's social licence modelling, which may help explain the similar improvements in trust over this period. There is an opportunity for the industry to reduce the proportion of neutral responses through clearly demonstrating that it understands and is responding to community concerns.

The live export industry is prepared to change its practice in response to community concerns

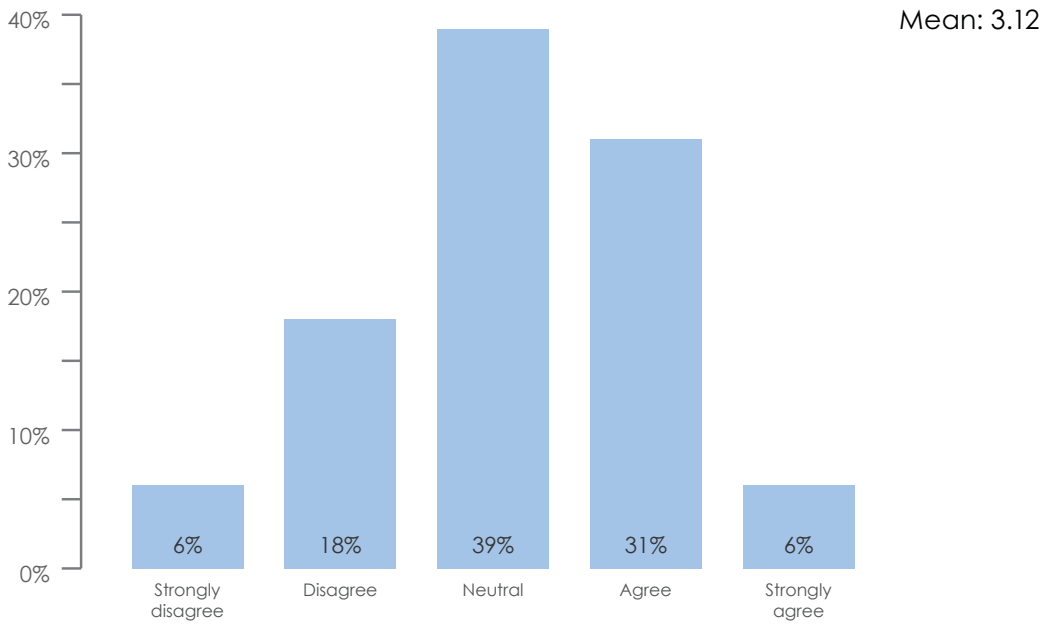


Figure 7. Ratings of agreement that the live export industry is prepared to change in response to community concerns, 2023



Photo credit: The Livestock Collective

ANIMAL WELFARE

Animal welfare remains a key element of the national discussion about the live export industry in Australia and elsewhere. This critical issue has been examined from multiple dimensions in all three surveys in this program of research.

We asked a series of questions that examine attitudes towards animal welfare at different points in the live export supply chain. For example, we asked participants to respond to questions regarding the welfare of animals on the voyage to overseas destinations, transport once in the destination country, and the treatment of animals in export markets more generally.

Overall, sentiment related to the treatment of animals throughout the supply chain improved over the last two years, although concern remains high. The proportion of participants indicating 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 (M = 3.31). However, in 2023 a large majority of participants agreed or strongly agreed that welfare outcomes are tied to journey length, with 67% agreeing that “the longer an animal is on a live export ship, the poorer its outcomes” (M = 3.84), with only 6% disagreeing.

Just under half of participants (47%) supported the statement that the way animals are transported to overseas markets bothers them. A similar proportion of Australians (49%) indicated concerns regarding how animals are transported once they arrive overseas. Agreement on both of these measures decreased in 2021 and 2023 compared to the

2019 baseline.

As shown in Figure 8 below, more than half (58%) agreed or strongly agreed that the Australian industry has improved the standard of livestock management and slaughter in overseas markets, with only a small proportion disagreeing (12%), and the remaining responses “neutral” (30%). This is a significant improvement from the 2019 response to this item, where only 41% indicated agreement.

Community views also continue to evolve regarding the complexity of welfare as an issue, with 70% of Australians in 2023 in agreement that animal welfare is about more than the absence of harm to animals, compared to 63% in 2021 when the question was first asked.

KEY INSIGHTS

While Australians remain concerned about animal welfare in the live export industry in 2023, responses in general have improved significantly since 2019. Australians understand that welfare is a complex issue and their views reflect growing awareness of the work of the industry to improve welfare outcomes and treatment in overseas destinations.

The Australian live export industry has improved the standard of livestock management and slaughter in overseas markets

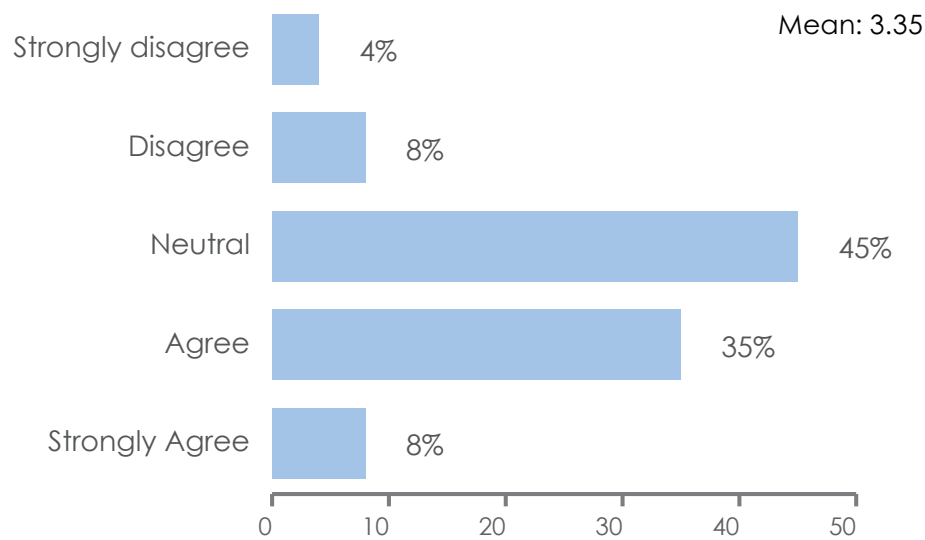


Figure 8. Ratings of agreement that the Australian live export industry has improved management and slaughter practices in overseas markets, 2023

WELFARE ACROSS THE SUPPLY CHAIN

In addition to general welfare, we investigated the perceptions of community on welfare issues that were present across the export supply chain. This was completed using a heatmap, where participants identified areas of concern on an image of a live export supply chain by ‘clicking’ once with their mouse or finger on a mobile device. Participants were invited to comment on their selection, and then were asked additional questions about welfare specific to international markets. The number of written responses to this increased from just under half in the previous survey to 69%.

Once again, the heatmap identified the most significant concerns in the voyage and processing of animals (as shown below in Figure 9; red areas identify the most clicks by respondents).

When asked to describe the reason for their answer, responses were mixed. The most common responses included ‘no concerns at all’, concerns with duration of journey, self-described lack of knowledge about the process, lack of transparency, and concerns regarding deaths and handling and processing of animals when they arrive at their destination.

As in the last survey, we included items to explore the nuance in the question of animal mortality on ships. When asked to rate their level of agreement with the statement “the average number of live export deaths is acceptable to me”, 43% of participants disagreed or strongly disagreed, 28% were “neutral” and 29% agreed or strongly agreed. Similarly, 42% of participants agreed or strongly agreed that “it doesn’t matter to me how many animals die on a live export voyage, one death is too many”, with 31% disagreeing and 27% “neutral”. Notably, agreement with the first item and disagreement with the second item increased slightly from 2021. Knowledge of this issue is explored later on page 20.

To explore the potential differences between concerns about average deaths relative to infrequent but significant mortality events on voyages, we presented the statement “I am more worried about large numbers of animals dying on a single voyage that ‘goes wrong’ than I am about the average number of animals that die over a year across all voyages”. In 2023, 42% of participants indicated agreement, similar to the items above but a greater proportion indicated a “neutral” response (35%) and 23% disagreed or strongly disagreed. Again, agreement with this item increased slightly from 2021.

Finally, animal welfare at destination was a common concern for respondents; 76% of participants this year agreed or strongly agreed that “It is never acceptable to lower animal welfare standards for religious or cultural reasons” (M = 4.11) However, there is also strong acknowledgement that live exports have an important purpose, with 45% agreeing that live exports support important cultural practices overseas, 54% agreeing that it supports preferences for freshly slaughtered meat, and 54% agreeing that it addresses a lack of suitable refrigeration options overseas.

KEY INSIGHTS

The voyage and processing of animals in destination markets remain the locations of greatest concern for respondents. There is an opportunity for the live export industry to demonstrate the controls in place to prevent significant single incidents on voyages to overseas destinations.



THE BENEFITS OF LIVE EXPORTS FOR DESTINATION MARKETS

The live export industry exists to provide a product to overseas markets. In this section, we outline the findings of questions that aim to explore the extent to which Australians believe the industry provides value to citizens and industries in these countries.

In 2019 and 2021, we found that Australians clearly recognised the benefits of the live export industry to people living in destination markets. This positive sentiment has strengthened in 2023 (see Figure 10), with the proportion of agreement and strong agreement with these statements increasing. When asked about the benefits regarding diet and nutrition to people overseas, 64% strongly agreed or agreed that the industry supports this goal (increasing substantially from 55% in 2019). When asked about whether the industry helps to provide safe sources of meat, 69% agreed or strongly agreed (up from 61% in 2019).

There were similar improvements in sentiment observed for benefits beyond supply of animals themselves, with 49% of participants agreeing in 2023 that the industry exports know-how and technology as well as livestock (increasing from 41% in 2019). Two additional items extended this idea to examine the benefits of breeding stock exported to overseas destinations. Increasing from 65% in 2021, 66% of community members agreed or strongly agreed that “exporting breeding stock to overseas countries helps them to ensure their own food security” (7% disagreed or strongly disagreed and 27% were “neutral”).

The employment opportunities created by the live export industry in foreign countries, assessed for the first time in this year’s survey, were perceived favourably, with 67% agreeing or strongly agreeing with this statement (see Figure 11)

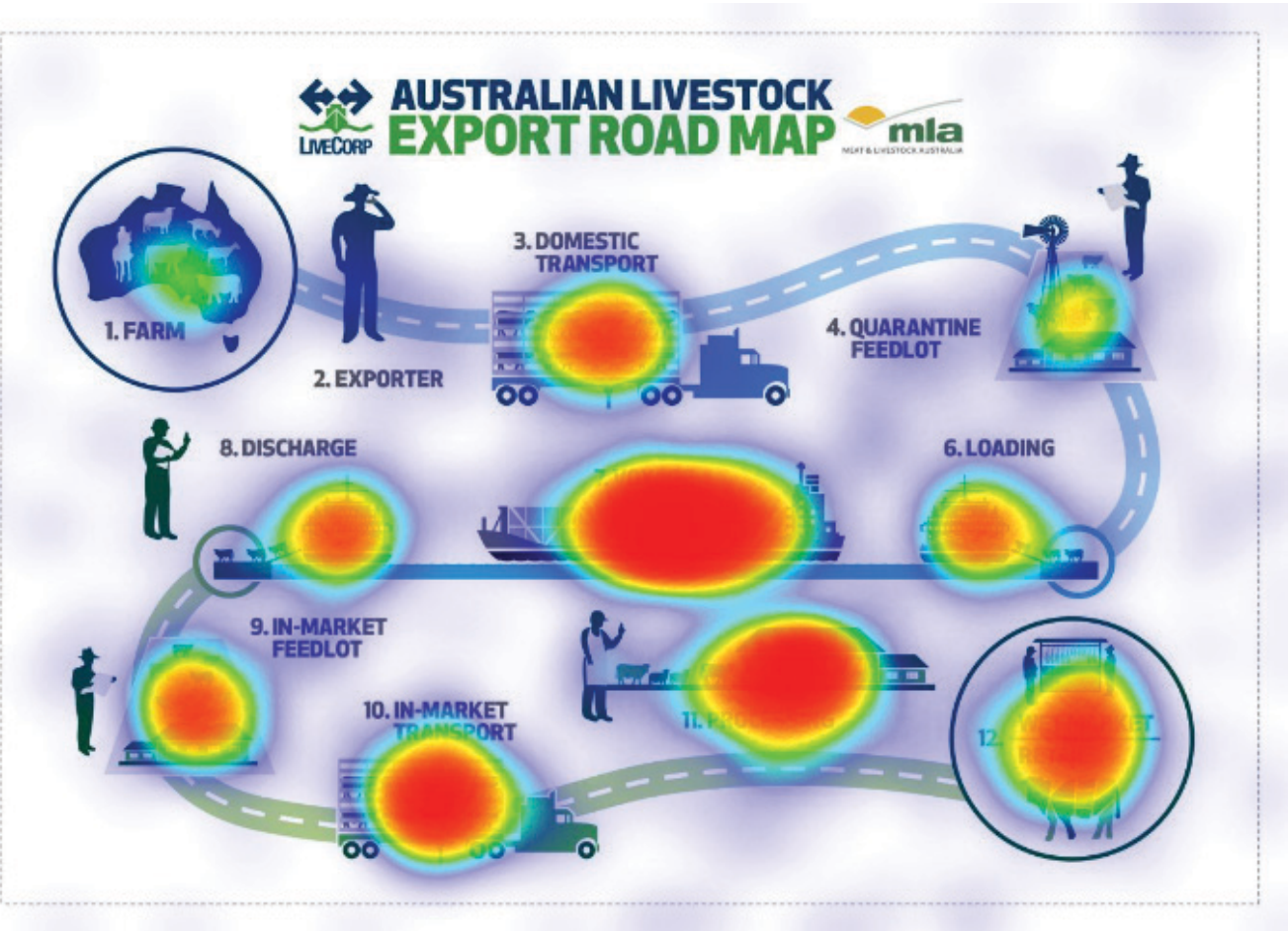


Figure 9. Areas of community concern on the live export roadmap, 2023

THINKING ABOUT THE WIDER JOURNEY

When asked about which part of the supply chain concerned them the most, many participants expressed a lack of understanding about the process from when animals left the farm, to their arrival at their destination market.

“Uncertainty about what happens after the animals leave Australia.

“I do not know enough about the water transport, you only hear of bad situations, are they rare or common or something else.

“We don't know the condition of that transport... and what happens at slaughter.

“Not sure of the quality of feed in the overseas market.

The live export of animals to overseas markets supports the improvement of diet and nutrition of people in those countries

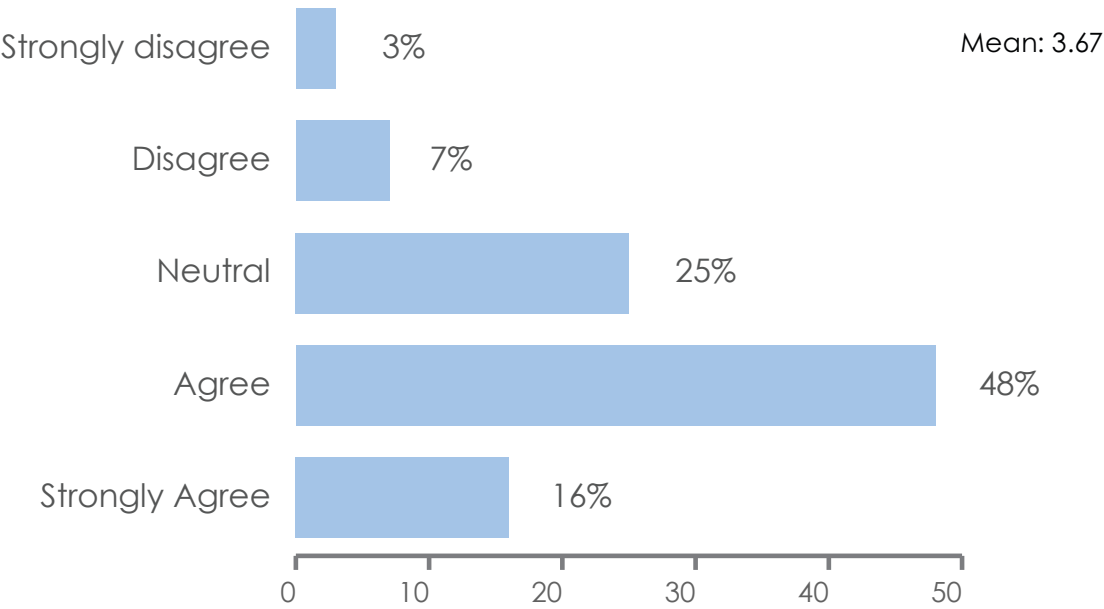


Figure 10. Ratings of agreement that the export of live animals supports diet and nutrition at destination, 2023

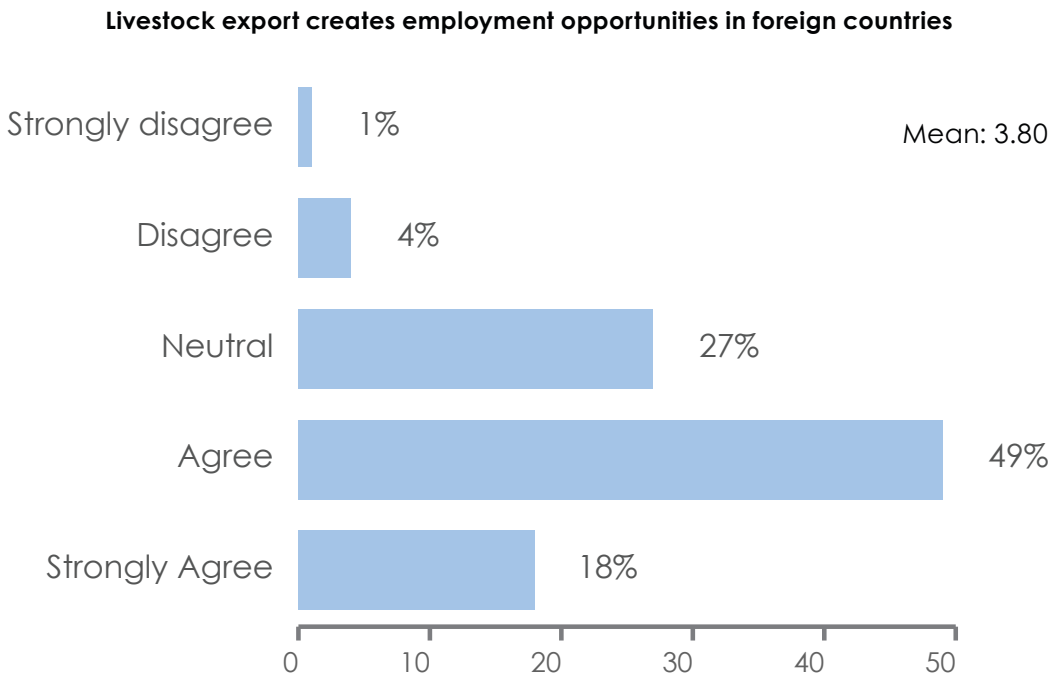


Figure 11. Ratings of agreement that live exports create employment opportunities in foreign countries, 2023

KEY INSIGHTS

There is growing positive recognition of the importance of the live export trade for the citizens of destination markets with respect to a range of health, cultural, and other benefits. The transfer of know-how, technology and breeding stock to develop and maintain strong and higher welfare livestock industries in these destinations is also increasingly seen as a positive outcome by Australians.



VALUE PROPOSITION OF LIVE EXPORTS

In this section, we will explore benefits and issues relating to the industry that contribute to, and undermine, the extent to which community members support the continuation of live exports from Australia.

All three surveys explore how community members feel about the live export industry overall, having considered the benefits the industry brings to Australia, farmers and overseas destinations as well as areas of concern such as animal welfare at different points in the supply chain. After answering a range of questions about benefits and concerns they may have relating to the industry, participants were asked “as a whole, how do you feel about the costs and benefits of the live export industry in Australia?” using a 5-point scale from 1 (“Costs greatly outweigh the benefits”) to 5 (Benefits greatly outweigh the costs”), where 3 represents “Costs and benefits are about equal”.

In 2019, the average score on this measure was 3.05, representing an even balance with the community about the costs and benefits of this industry for Australia. This evaluation improved significantly to 3.12 in 2021 and remained stable in 2023 (see Figure 12). A greater proportion of Australians feel the benefits of the industry outweigh its perceived negative impacts.

The change from 2019 reflects improvements in perceptions of benefits for people in both domestic and overseas destinations and a slight easing in concern around animal welfare.

As a whole, how do you feel about the costs and benefits of the live export industry in Australia?

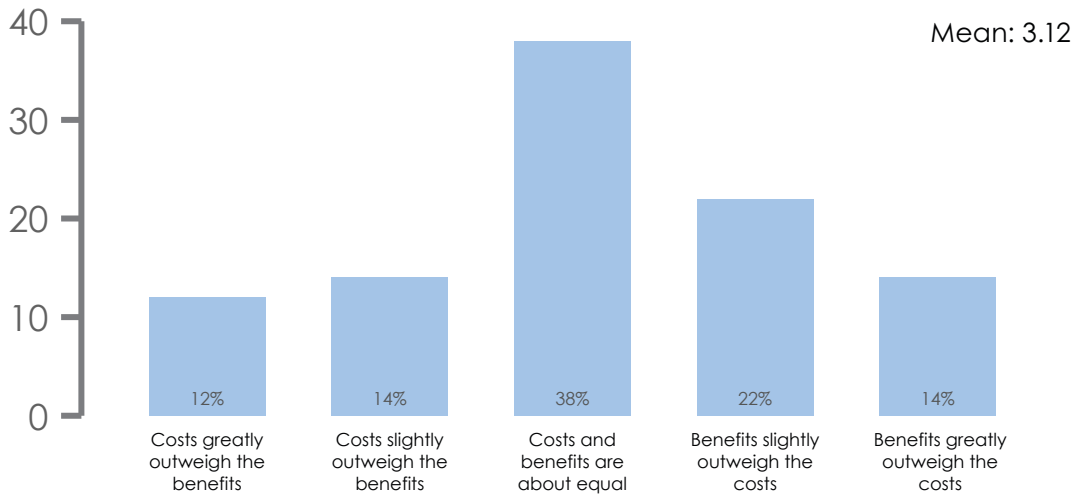


Figure12. Costs vs benefits of the live export industry in Australia, 2023

KEY INSIGHTS

The value proposition for the live export industry in Australia has improved significantly among Australian citizens since 2019.

LIVE EXPORT INDUSTRY KNOWLEDGE – SHIPBOARD MORTALITY

We wanted to understand if knowledge about the live export industry influenced community member acceptance of the industry. Shipboard mortality has been identified as the greatest area of concern, so we first explored knowledge and expectations around mortality rates on voyages.

We first asked participants “What is your best guess for how many sheep, on average, die on a typical 17-day live export voyage to the Middle East?”

Six options were provided: 1, 3, 8, 21, 52 and 104 in 10,000 animals, where the correct answer is 21 in 10,000 animals. As seen in Figure 13, there was a fairly even spread of responses across these options, indicating low levels of knowledge in general about the level of mortality on sea voyages.

What is your best guess for how many sheep, on average, die on typical 17-day live export voyage to the Middle East?

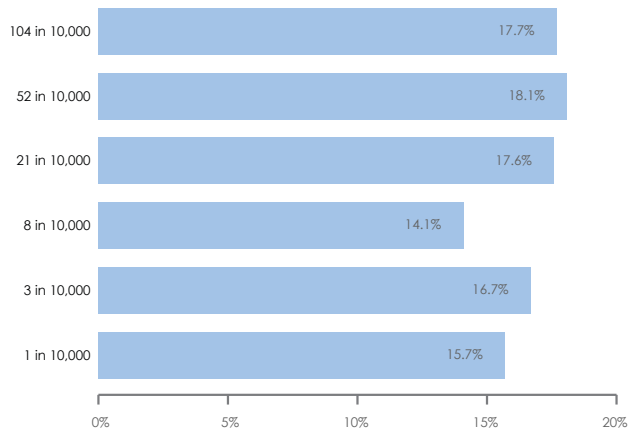


Figure13. Percentage agreeing with expectations about sheep mortality in transit, 2023

We then presented participants with information regarding the actual number of sheep deaths on sea voyages to the Middle East and asked them to tell us the extent to which this mortality rate was higher or lower than they expected (see Figure 14).

According to the Australian Government Department of Agriculture, 21 in every 10,000 (ten thousand) sheep and 8 in every 10,000 (ten thousand) cattle transported overseas in 2021 died while in transit. Is that number:

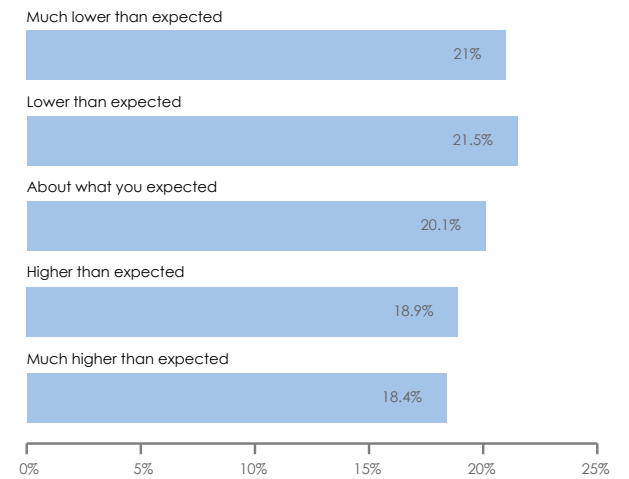


Figure14. Percentage agreeing with expectations about cattle and sheep mortality in transit, 2023

Of the respondents, 42.5% indicated that this mortality rate was “lower” or “much lower” than they expected. 37.3% of respondents indicated that the mortality rate was higher or much higher than they expected, and 20.1% that it matched their expectations.

On another knowledge-related item, 71% of participants agreed or strongly agreed that “I don’t need to know the specific details, I just want to know the industry has processes in place to ensure the welfare of animals”.

³ Department of Agriculture, Fisheries and Forestry. (2023). Reports to Parliament. Retrieved May 15, 2023 from <https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/live-animal-export-statistics/reports-to-parliament>



KEY INSIGHTS

Knowledge of the live export industry and mortality rates for sheep on sea voyages is low. When presented with information about mortality rates, a greater proportion of Australians felt these rates were lower than they expected.

RULES GOVERNING THE LIVE EXPORT INDUSTRY

Public confidence in the rules that govern an industry is critical. This is particularly the case where the industry manages the welfare of animals. For community members, these mechanisms provide assurance that standards are being applied and met, and that consequences for breaching these standards are real and encourage adherence. When effective, these mechanisms protect the public interest and can lead to higher levels of community trust.

We asked respondents to indicate their confidence that “standards for the live export industry ensure people in the industry do the right thing”, with 56% of community members agreeing or strongly agreeing, a small decrease from 2021 (60%). About a third of participants (31%) indicated they were “neutral” on this measure (27% in 2021) and 14% disagreed or strongly disagreed (13% in 2021). In a similar result to 2019 and 2021, 83% of respondents agreed or strongly agreed that standards and their enforcement were important.

When participants were asked to rate the extent to which “regulators of the live export industry are able to hold the industry accountable”, 55% of participants agreed or strongly agreed, 32% were “neutral” and 13% disagreed or strongly disagreed (Figure 15). These results were very similar to the 2021 survey results. Results were also very similar when we

asked participants the extent to which “the federal government is able to hold the industry accountable”, with 57% of participants in agreement, 29% “neutral”, and 13% disagreeing. The average ratings on these accountability items are also above the midpoint of the scale used (M = 3.49 for regulators, and 3.52 for federal government), indicating strong confidence in governance mechanisms.

This idea is further supported by strong agreement with the statement “I have confidence that the live export industry is taking effective action to ensure the welfare of animals”, with just under half of participants endorsing their agreement (49%), and only 19% disagreeing (32% remain “neutral”).

KEY INSIGHTS

Together, these data indicate that there is strong public confidence in the mechanisms used to apply and enforce standards on the industry.

Regulators of the live export industry are able to hold the industry accountable

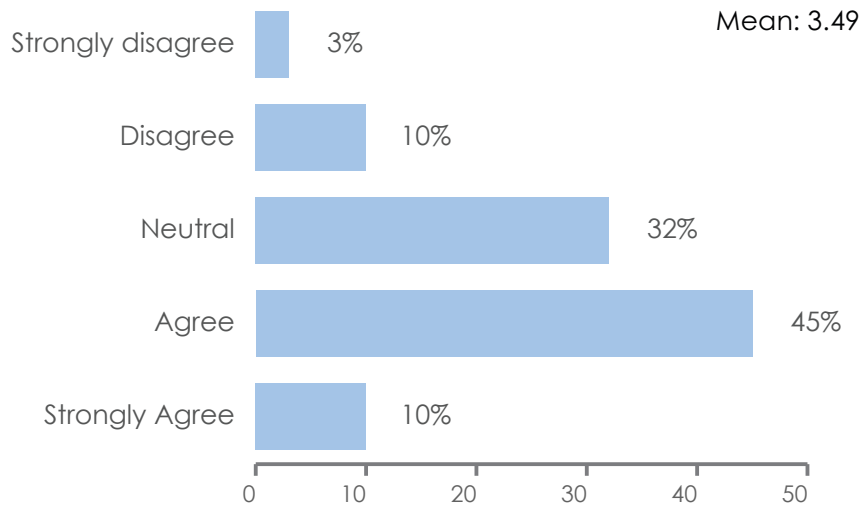


Figure 15. Ratings of agreement that regulators are able to hold the industry accountable, 2023

SPOTLIGHT – LIVE SHEEP EXPORTS

The Australian Government has committed to phasing out live sheep exports from Australia by sea. The policy does not apply to other sectors of the industry, such as live cattle exports, or sheep exports by air. This led us to explore the perceptions of the community on live sheep exports through a series of questions in this year’s survey. These were included in a section at the end of the instrument so that participants responded to the general questions before responding to these sheep-specific items.

Six questions asked about live exports generally were adapted to examine attitudes toward the export of sheep, specifically. When comparing the mean responses across the six questions (Figure 16), respondents were more broadly accepting of conditions of live exports of sheep (M=3.18) when compared to conditions in general for live exports (M=3.10). When asked if the live export industry was moving in the right direction, more respondents agreed or strongly agreed on the general question (M=3.44), compared to sheep (M=3.26). Neutral responses for both items were high.

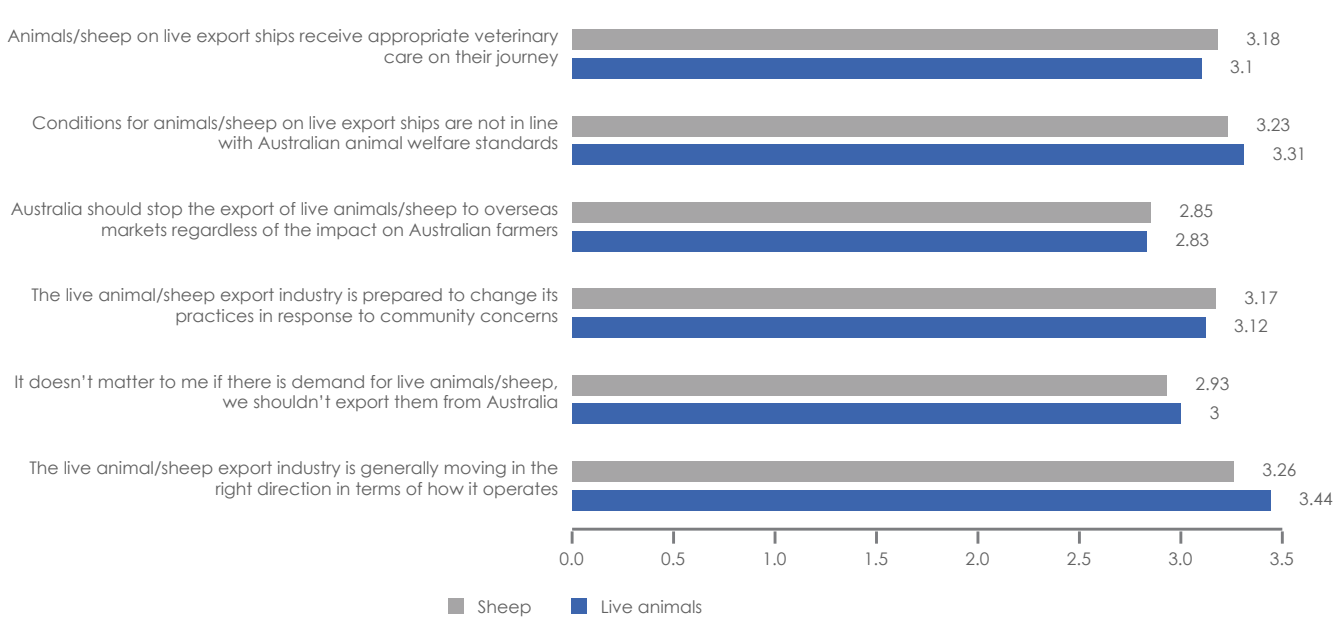


Figure 16. Ratings of agreement (Means out of 5) for live animal exports compared to sheep live exports, 2023.





Photo credit: The Livestock Collective

The survey asked how participants felt when asked how they felt about the costs and benefits of the live export industry overall and when considering the live export of sheep specifically. The majority of participants either said benefits outweigh costs (36%), or were neutral on the matter (38% industry, 37% sheep) for both questions, with the average rating remaining above the midpoint of the scale (i.e. the industry has net positive value; M = 3.12, industry; M = 3.18, sheep). These patterns show that the costs

and benefits of the industry are weighed similarly by Australians, independent of the animal being exported (Figure 17).

KEY INSIGHTS

There was no significant difference in the way that Australians view live sheep exports relative to the industry in general.

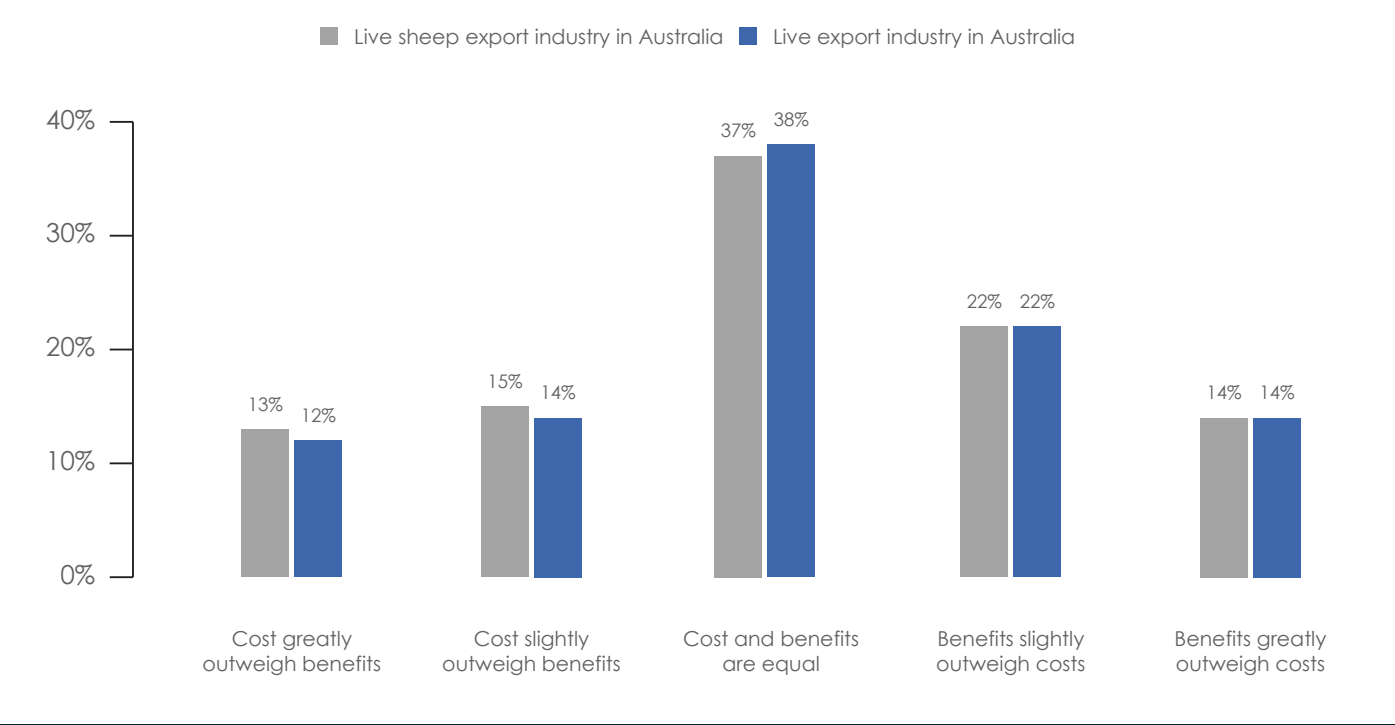


Figure 17. Ratings of cost and benefits of the live sheep export industry and the live export industry as a whole, 2023

THE MECHANISMS OF COMMUNITY ACCEPTANCE OF LIVE EXPORTS IN AUSTRALIA

Community acceptance of an industry is fundamental to its continued operation in Australia. This report so far has discussed community sentiment about a range of important aspects to the live export industry. In this section, we will explore how these issues and topics relate to community acceptance of the industry in Australia. There are two important reasons for conducting the analyses reported in this section: to identify the mechanisms for improving the relationship between the live export industry and the Australian community, and to determine the relative importance of specific dimensions of issues such as industry responsiveness in driving acceptance.

PATHWAYS TO ACCEPTANCE

The pathways to community acceptance for the live export industry have been examined using a statistical method called Path Analysis. This technique allows us to identify the key drivers of acceptance and their relative importance in improving the relationship between the community and the industry, effectively articulating a recipe for continued operation and areas where the industry should focus its efforts. This year, analysis found four areas of importance when considering acceptance of the live export industry. These will be discussed in order of importance.

In 2023, we found the same drivers were important in predicting acceptance as in 2019 and 2021, although the appearance of additional factors provided further nuance for the live export industry's relationship with community members.



1. Trust in the live export industry

Overall, we can see that trust is central to the relationship between the industry and community members. Specifically, the more that community members trust the industry to act responsibly, the greater their level of acceptance of the industry. Trust is the strongest driver of acceptance in this year's model.

Trust in this context serves real purpose in the relationship, providing benefit of the doubt when things go wrong and permission to innovate in the pursuit of better performance. Trust can also be seen to operate as a mediating variable in this model, acting as a vehicle that translates community experiences and expectations of the live export industry into their level of acceptance of the industry.

In the 2023 model, trust is strongly driven by industry responsiveness (the extent to which the industry listens and responds to community concerns) and regulation (the level of confidence Australians have in the governance of an industry and its operations).

2. Animal welfare standards

The path model is made up of a range of questions related to the Australian community's beliefs about animal welfare. Questions related to this item include:

- Personal beliefs and standards about animal welfare
- The importance of standards for animals, and whether they are good enough
- The economic value of the industry
- Industry responsiveness.

Unlike 2019, when animal welfare only drove acceptance indirectly by improving trust, the extent to which animal welfare standards were perceived to be in line with Australian standards were a direct driver of acceptance in the 2023 model. The more that community members feel industry supply chains are in line with Australian industry standards,

the more accepted the industry is. The expanding role of animal welfare standards in the current model as a driver of both trust and acceptance separately, suggests that community members are increasingly valuing the extent to which the industry considers animal welfare standards.

3. The value of live exports to people overseas

This is the extent to which the community perceives the industry to positively contribute to overseas markets. This is through factors such as nutrition, quality of breeding stock, and food availability. The more the industry is perceived to contribute to these factors, the higher the acceptance by the community.

The expanding role of importance to overseas markets in the current model suggests that the community is increasingly placing value on the benefits that the industry provides in this area.

4. Overall value proposition for the industry

Acceptance was also higher among those community members for whom the benefits of the industry were seen to outweigh its apparent costs. Informing this judgement were welfare standards, perceived acceptance of animal mortality, the importance of overseas markets, and the extent to which live exports are perceived to help Australian farmers.

This shows that most Australians have a nuanced view of the live export industry. As long as the industry is perceived to provide benefits and uphold welfare standards, it is viewed more positively. This means that the industry can influence its acceptance by behaving responsibly.

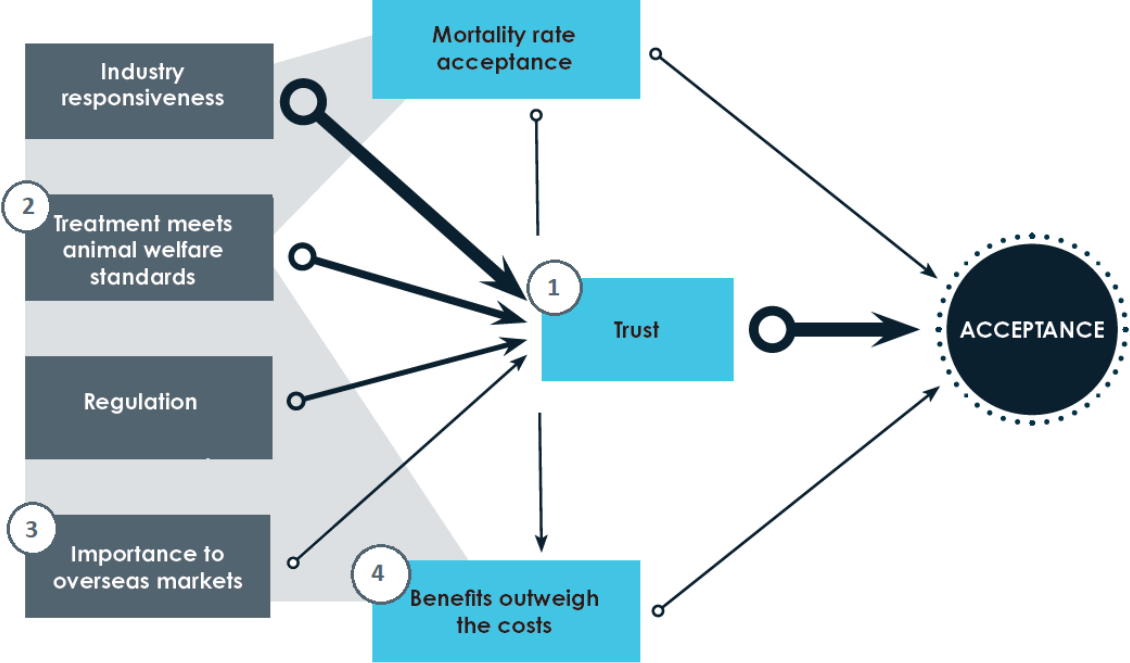


Figure 18. A stylised diagram of the acceptance path model for the live export industry

A LITTLE MORE ABOUT PATH ANALYSIS

The 2023 path model is shown in Figure 18. With a path model like this, we are seeking to understand how the topics and issues measured in the survey relate to each other and to the key outcome variable, in this case community acceptance of the industry. That is, where the rest of this report has focused on what community members think, this model is seeking to help us understand the patterns underlying why community members think the way they do. This type of analysis is very effective in laying out a plan for community engagement and outreach, internal development, and innovation, based on the needs and expectations of community members.

Before conducting the path analysis, we first determine how all the questions included in the survey relate to each other. Where several questions are found statistically to be measuring the same construct (i.e. the two different questions we used to measure industry responsiveness), we combine them to form a scale, averaging responses on this set of questions to form a single score. These scales are then used in the path analysis, with one or more questions from the survey present in each of the boxes we can see in Figure 18. To answer a commonly asked

question, this path analysis is calculated using the responses of community members to the questions that we ask them in the survey. There may be some complex math underlying a path analysis, but the specifics of these calculations aren't important; its effect should be to illustrate clearly and concisely what is most important in the relationship between an industry and the community it operates within, and on what areas an industry should focus to deepen this relationship.

HOW TO READ THIS PATH MODEL

When reading the path model, follow the arrows from left to right. The direction of the arrow indicates the direction of the relationship; for example, greater trust leads to higher acceptance. The thickness of the arrow reflects their relative importance in driving the measure they are pointing at. The numbers represent the four items with the most significant impact, in order. All of the pathways in this model are positive, which means that higher scores on one measure lead to higher scores on the measure it is pointing at; for example, the more that community members feel animals are treated in line with Australian welfare standards, the more they trust the live export industry.

CONCLUSION

The third national survey of community attitudes provides an updated summary of sentiment towards the Australian live export industry. A national, broadly representative sample of 4,716 Australians over the age of 18 years contributed to a deeper understanding of the nature of the relationship between this industry and the Australian community, building on lessons from previous surveys.

This research program represents the largest, most authoritative, and most comprehensive dataset on Australian attitudes toward this industry available. The research aims to explore and present the critical nuance and complexity inherent in the relationship that Australians have with the live export trade. Moreover, this research is presented publicly to support constructive, informed discussion about the future form and operation of the industry in this country. It seeks to bring the voices of the Australian community directly into the conversation about live exports.

KEY REFLECTIONS

Broadly, there are several key findings in this data. Live exports are seen by Australians to be an important part of the agriculture sector, contributing significantly to the economic wellbeing and livelihoods of its participants in regional Australian communities and throughout the industry value chain.

Second, Australian attitudes toward the welfare standards applied to the industry have improved over time. Coupled with strong confidence in the regulatory governance of the industry, Australians have demonstrated growing confidence in the way the industry operates on this most important issue. Welfare remains the key issue on which the industry is judged by the Australian public, and should remain a key focus of industry and stakeholder attention.

Finally, we continue to refine our understanding of the key drivers of community trust in and acceptance of the live export industry. Public trust, and then acceptance, is shaped by community confidence that the industry is:

- listening and responding to community concerns
- delivering health, nutrition, and cultural value to citizens in overseas destination markets
- adhering to formal regulatory regimes that community members perceive to ensure high welfare standards.

In addition, our path modelling drew out important nuance around the role of animal mortality in shaping the value proposition for live exports in Australia. The more that current levels of mortality are seen to be acceptable, the more positive the broader value proposition for live exports is seen to be, which in turn positively influences community acceptance of the whole industry.

What is most important here is that the acceptability of mortality rates is informed by the responsiveness of the industry to community concerns, the extent to which the treatment of animals meets our high welfare standards, and the importance of the industry to people living in the destination markets for Australia's live animal exports. Acceptability is not dependent on deep ideological preferences among community members, but a clear set of expectations or contingencies that may be measured, monitored and improved through proactive industry effort.

The modelling also demonstrates that Australians understand the value of the live export industry in terms that are bigger than its economic contribution to Australia. Of note is the value of exports for supporting important cultural needs, nutritional benefits and technology limitations around chilled meat storage in overseas destinations and how this factors significantly in evaluations of the industry's acceptability by Australians.

Additional insights from the modelling

The path model for social acceptance of live exports has additional features of value to understand. As reported earlier, we asked participants to rate their level of acceptance of current mortality rates of animals on board export vessels. The modelling shows that this acceptability influences the broader value proposition for the live export industry; the more acceptable people find these mortality rates, the more positive the overall value proposition for the industry, which in turn positively influences acceptance of the industry overall.

However, it is important to note that acceptability of these mortality rates is itself contingent on industry responsiveness to community concern, adherence to high welfare standards, and the value of exports to citizens in destination markets. Australian support for the industry is dependent on industry performance and its capacity to engage meaningfully with community concerns.

LIVE EXPORTS AND THE AUSTRALIAN COMMUNITY

The value of the industry to Australian farmers and the communities in which they live is also clear. All of this value, again, is dependent on adherence to high animal welfare standards by the industry and its participants. This is primary and must be clearly demonstrated to continue the strengthening of perceived community value of the industry to this and other countries.

Together, this modelling shows that the way community members think about live export, what informs their thinking and shapes their acceptance of it, is very different to the way that the industry is described in the national public discourse by its critics. This does a disservice to the considered responses of Australian community members in this research since 2019. These findings over three national surveys have empirically demonstrated that relatively small numbers of Australians hold binary, adversarial attitudes toward the industry. Many more Australians hold balanced and mature perceptions and preferences. This is not to downplay animal welfare as a critical issue - far from it. However, it does show in 2023, as in 2021 and 2019, that welfare is a large piece of a much bigger relational narrative.

The challenge for the live export industry is to internalise these findings, accept that its relationship with the Australian community is complex, and that the onus is on the industry itself to demonstrate how it is meeting and/or exceeding community expectations in key areas of performance and stewardship. The Australian public has provided a blueprint for the industry's social licence to operate; how closely the industry follows this blueprint is dependent on its capacity to embrace the challenge.

The secondary role for the industry is to help its key stakeholders to engage with these findings. There is always value in challenging assumptions about 'what people think' on complex and challenging issues; for the live export industry, there is value in challenging its own understanding of what value it delivers for Australia, and to help others outside of industry to see that it understands the conditions for its social acceptance. The most effective way to do this is through action. The modest improvements that the industry has demonstrated in this program of research to date based on the actions industry has taken since 2019, is evidence that this is positively influencing its standing within the community. The time is right to accelerate this progress.



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