

LIVE EXPORTS AND THE AUSTRALIAN COMMUNITY

A national survey
2020



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 Australian livestock export industry (live export) has a complex relationship with the Australian community. The Australian Livestock Export Corporation (LiveCorp), a not-for-profit industry group providing technical services and research, development and extension (RD&E) reports that “Australia is the world leader in the export of live cattle, sheep and goats”. The industry generates significant economic benefits for Australia (almost \$2 billion in export earnings a year) and employs 13,000 people mainly in rural and regional Australia¹. Yet, the Australian live export industry, perhaps more than any other agricultural industry, is facing real social, interest group and political pressure around a central component of the industry: the welfare of animals.

This report provides a summary of the first stage of a three-year research program being undertaken by Voconiq, a CSIRO spin out company, on the nature of the relationship between the Australian community and the Australian live export industry. This research seeks community attitudes toward animal welfare in the live export trade in detail and seeks to understand more fully not just what community members think about animal welfare but how animal welfare fits into a broader industry context of drivers of trust and acceptance of the live export industry.

The aim of this research is to help LiveCorp, the whole value chain behind the Australian live export industry, policy makers and other key industry stakeholders understand more clearly the nature of community sentiment toward the industry, and the potential pathways to developing trust and acceptance of the industry with the Australian community.

¹ LiveCorp (2020) LiveCorp “About Us” page, <http://www.livecorp.com.au/about-us/introduction>, accessed 6th March 2020.

THE RESEARCH PROCESS

In year one of this three-year program of research, Voconiq sought to understand more about the full breadth of issues and topics related to the live export industry through broad industry stakeholder engagement, engagement with critical perspectives from outside the industry, desktop research and media analysis. From this collation of perspectives and information, a survey instrument was designed that covered a broad spectrum of topics, including animal welfare. This survey instrument was then used to conduct a national survey of Australians over the age of 18 years.

A community survey was used for several important reasons:

- It allows us to reach and engage a broadly representative group of Australians over 18 years
- Many more Australians can share their perspectives about the live export industry than would be possible using other methods
- The data that is collected can be analysed in ways that allow us to understand the pathways to deeper trust between the live export industry and the Australian community.

To conduct this national survey, we engaged a research panel provider for data collection. Research panels are used frequently in survey research of this kind to access a group of people that reflects the broader Australian population on specific demographic attributes. In this survey, participants were matched broadly with Australian Bureau of Statistics (ABS) data for age, gender, and education levels. Participants 18 years and over were drawn

from across Australia to ensure that those in regional areas also had a voice in this important research.

A pilot test of the survey instrument was conducted between 10th October and 7th November 2019. Data collection for the full sample was completed between 28th November 2019 and 27th of January 2020. Of the 5,539 surveys that were completed, 4,830 were included for analysis after data cleaning².

A three-year program of research allows us to build on this comprehensive baseline of community sentiment. We can grow the work to focus on specific topics of interest or importance, utilise a range of additional methodologies to test ideas and answer questions that arise, and evaluate the effect of live export industry members' actions.

² 'Data 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?

The live export industry value chain, or all its component parts from where animals are raised to where responsibility for an animal ends, is long and complex. As LiveCorp's own infographic shows (see Figure 1), there are multiple sources of animals, routes to foreign markets, and purposes that animals bred in Australia are used for in overseas countries. As this infographic also indicates, there are different regulatory and oversight frameworks within which the industry operates at different stages of this process. And the live export industry is not independent of a broader set of similar activities conducted by Australian rural industries: farmers in some states of Australia, for example, sell animals for live export as well as to the domestic meat supply chain.

Our challenge was to create a survey instrument that would cover a broad range of topics and issues in sufficient detail to allow specific analysis and reporting that would meaningfully inform the conversation about live exports and help industry participants understand more clearly the nature of their relationship with the Australian community. Following an informed consent process and

comprehensive suite of demographic questions, the instrument included questions about the following topics and issues:

- Information sources about the industry
- Attitudes toward meat eating and animal welfare
- The position of agriculture, animal farming, and live exports in Australia
- Different parts of the live export process (e.g. transport within versus from Australia)
- Value proposition elements for the industry (i.e. domestic and in overseas markets)
- The extent of responsibility for animal welfare for exporters
- Confidence in regulation
- Industry responsiveness, trust in the industry and associated stakeholders, and acceptance of the industry.



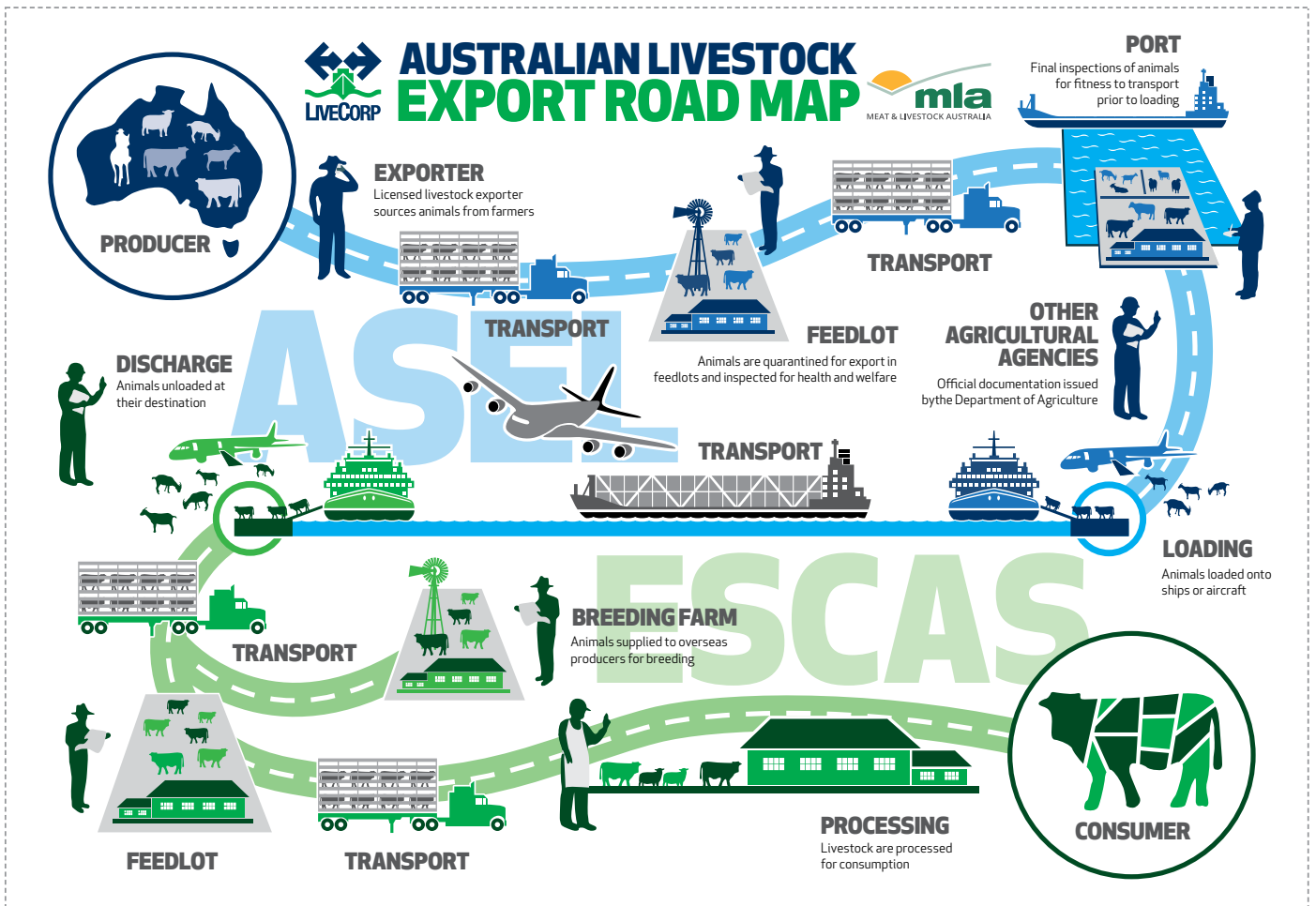


Figure 1. Australian livestock export industry road map (LiveCorp 2020)

WHO COMPLETED THE NATIONAL SURVEY?

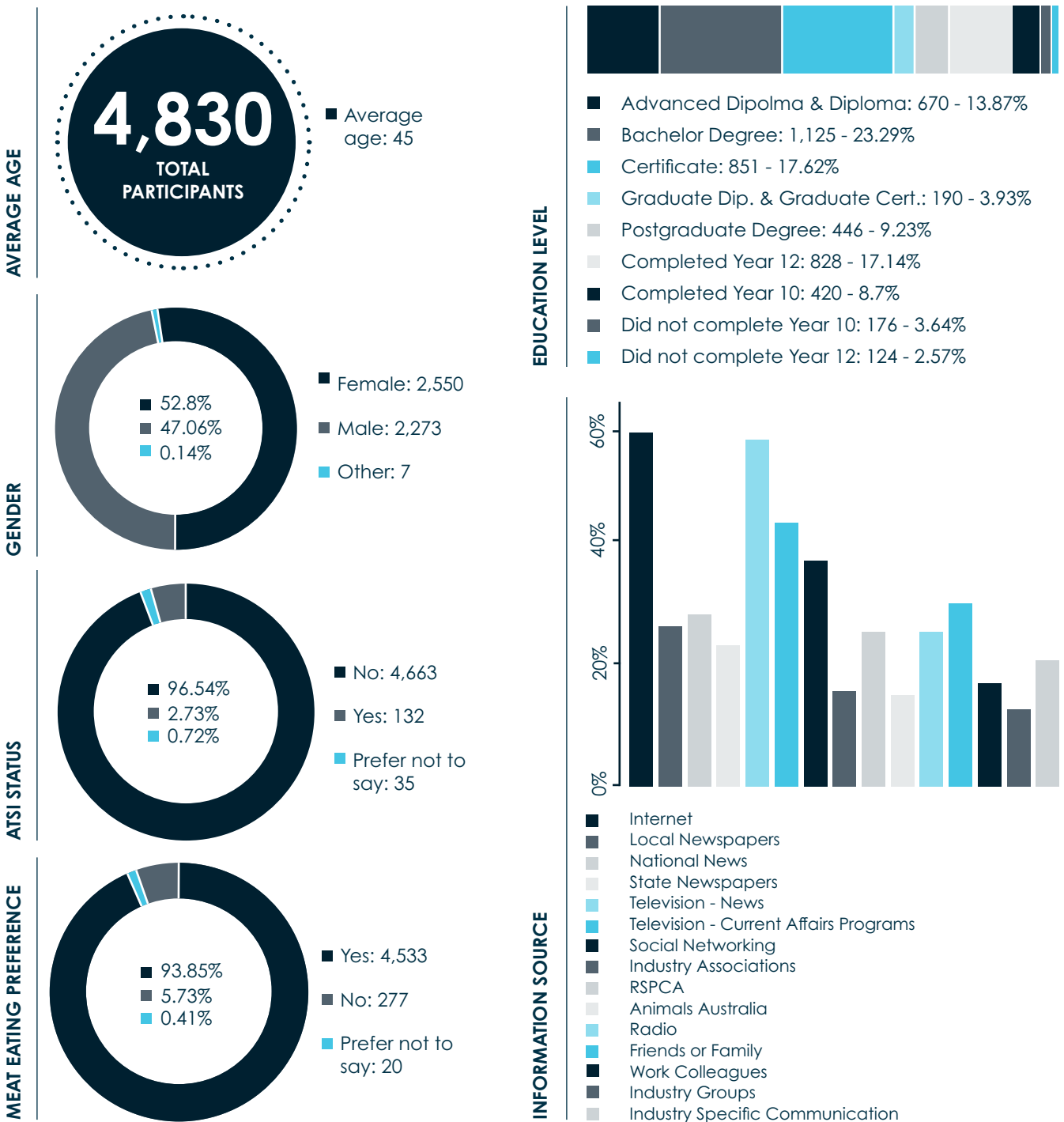


Figure 2. National survey participants

THE POSITION OF LIVE EXPORTS IN AUSTRALIA

To understand how Australians feel about the live export industry, we explored the position of the industry in Australia from a range of perspectives. Perceptions of the industry's economic contribution, contribution to regional Australian communities, and to the broader agriculture sector in Australia were measured. We also examined the baseline level of community trust in the live export industry, and acceptance of this industry in Australia.

LIVE EXPORTS AS AN IMPORTANT PART OF THE AUSTRALIAN AGRICULTURE SECTOR

A high proportion of Australians (72%) agreed that the live export industry makes an important economic contribution to Australia, and that it is an important part of the Australian agricultural sector

(69% agreed or strongly agreed). Livestock farmers themselves are highly valued by Australians, with 84% agreeing that they play an important role in Australian society and that meat provides important nutrition in the Australian diet (83% agree or strongly agree).

Australians also recognised the role that the live export industry plays in regional communities, with 74% in agreement that the live export industry makes an important economic contribution to farming communities that produce livestock for export, and 67% agreeing that without the live export industry many Australian livestock producing areas would suffer economic hardship.

However, while 39% of community members indicated that the live export industry 'bothers me a lot', 34% disagreed with this sentiment.

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

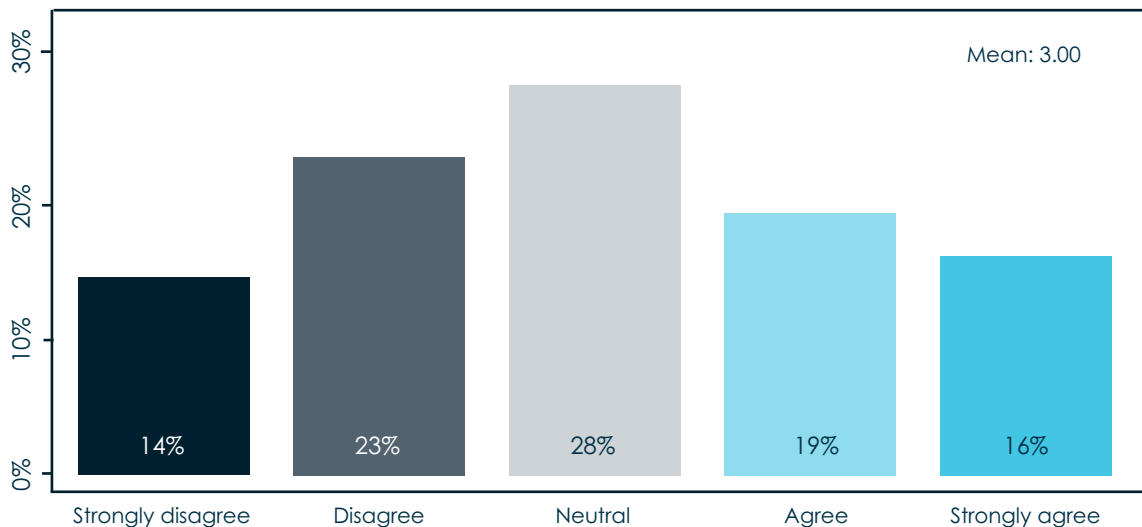


Figure 3. Ratings of agreement that live exports should stop regardless of impacts on farmers

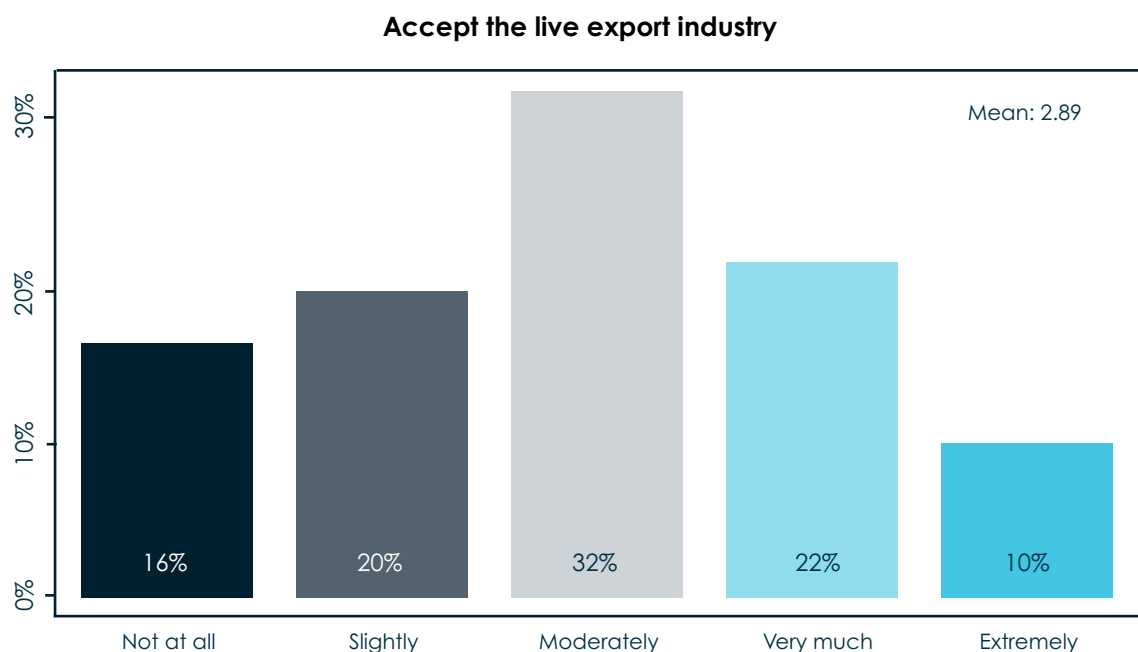


Figure 4. Ratings of acceptance of the live export industry

Finally, we asked community members to rate their level of agreement with the statement: “Australia should stop the export of live animals to overseas markets regardless of the impacts on Australian farmers”. Responses were mixed, with 37% of community members indicating some level of disagreement with this statement and 35% indicating some level of agreement (see Figure 3).

TRUST AND ACCEPTANCE OF THE INDUSTRY

We examined trust in the live export industry and a range of internal and external parties that are important to how it operates. The average score for community trust in the live exports industry to act responsibly was 2.91, on a scale where 1 reflects lower trust and 5 reflects higher trust. For the live export industry, 31% of participants indicated they had higher levels of trust in the industry (i.e. choosing

4 or 5 on this scale) and 33% of participants indicated lower trust in the industry (i.e. 1 or 2 on this scale).

This was stronger than trust in the federal government (Mean = 2.70) and in foreign governments that support the trade of live Australian animals to their country to act responsibly (Mean = 2.47).

In the context of this survey about the live export industry, community trust was highest in the RSPCA (Mean = 3.66), livestock farmers (Mean = 3.54) and veterinarians that work in the live export industry (e.g. looking after animals on board live export ships; Mean = 3.40).

Looking at community acceptance of the live export industry, the average score across the sample was similar to levels of trust at 2.89 (on a scale from 1 = not at all to 5 = extremely; see Figure 4).

RESPONSIVENESS OF THE INDUSTRY

We asked community members how much they felt the live export industry was open to change based on community concerns, with 36% of Australians surveyed indicating agreement (and 27% indicating disagreement) that the industry was willing to change (see Figure 5). We also asked how responsive to community opinions they felt the live export industry was. Again, 35% of community members agreed the industry was responsive while 29% did not agree that the industry was responsive to community opinions.

KEY INSIGHTS

The livestock industry is viewed as an essential part of the Australian economy and our national story. Australians also indicated that live exports are an important part of this story, and of the agriculture sector more broadly.

There is room to improve the level of community trust in and acceptance of the live export industry in Australia, particularly in light of much stronger ratings of trust in livestock farmers and the RSPCA.

Yet Australians also indicated moderate confidence that the live export industry was responsive to and open to change based on community concerns.

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

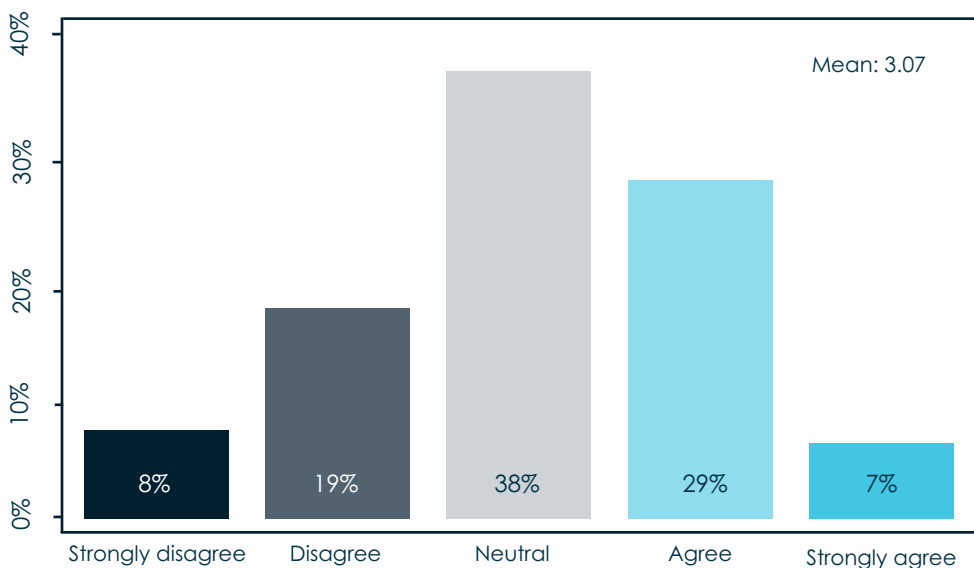


Figure 5. Ratings of live export industry willingness to change



ANIMAL WELFARE

Animal welfare is clearly a key issue for the live export industry, and we explored this topic in detail. We explored community perspectives around welfare across the industry value chain, from Australian farms to overseas market destinations. We also explored various elements of the value proposition for live export for Australia and these overseas destinations for animals produced here.

TREATMENT OF ANIMALS IN AUSTRALIA COMPARED TO OVERSEAS

By its nature, the live export industry has animal welfare responsibilities in Australia and in its destination markets. The survey data showed that the Australian community is confident that high welfare standards are applied in Australia but is less confident about overseas destinations for these animals. For example, while 43% agreed that Australian animals

are treated appropriately in the Australian live export industry (24% disagreed), 67% of Australians surveyed felt that animals are treated better in Australian domestic meat production processes than they are in overseas markets (7% disagreed). In addition, 62% of participants indicated agreement that the treatment of animals in overseas markets is not in line with Australian welfare standards.

Going deeper into community attitudes toward animal welfare in the live export industry, we found that just more than half of participants expressed concern about how animals are transported to overseas markets (e.g. by ship; see Figure 6), how they are transported once they arrive in their destination (e.g. by truck), and that Australian welfare standards make no difference to the way exported animals are treated when they arrive.

The way animals are transported to overseas markets (e.g. by ship) really bothers me

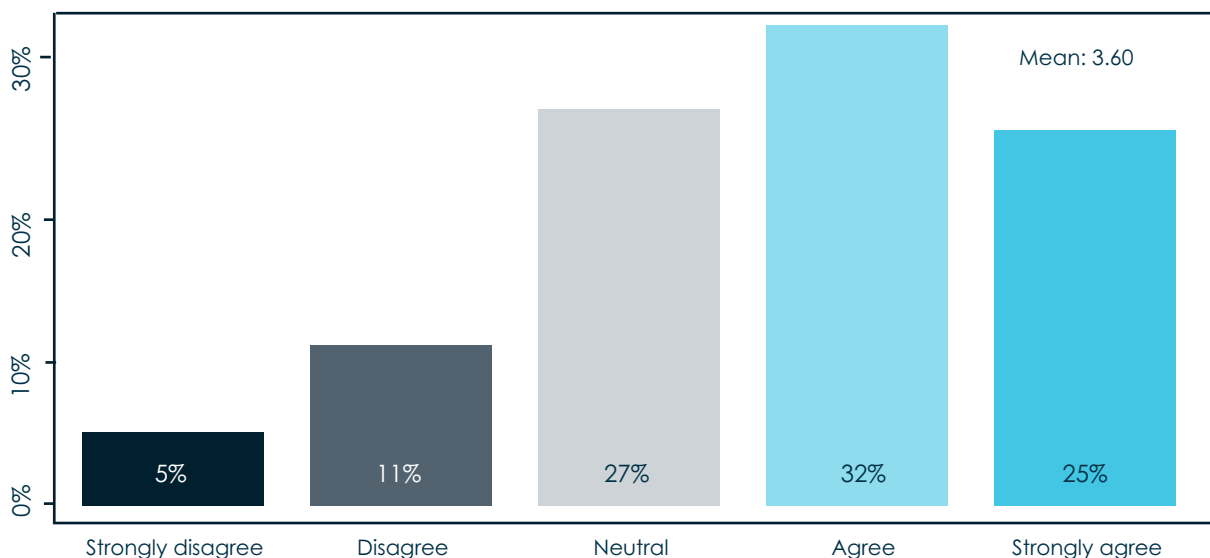


Figure 6. Ratings of concern about transport of animals to overseas markets

The live export industry helps overseas countries ensure their citizens have access to safe sources of meat

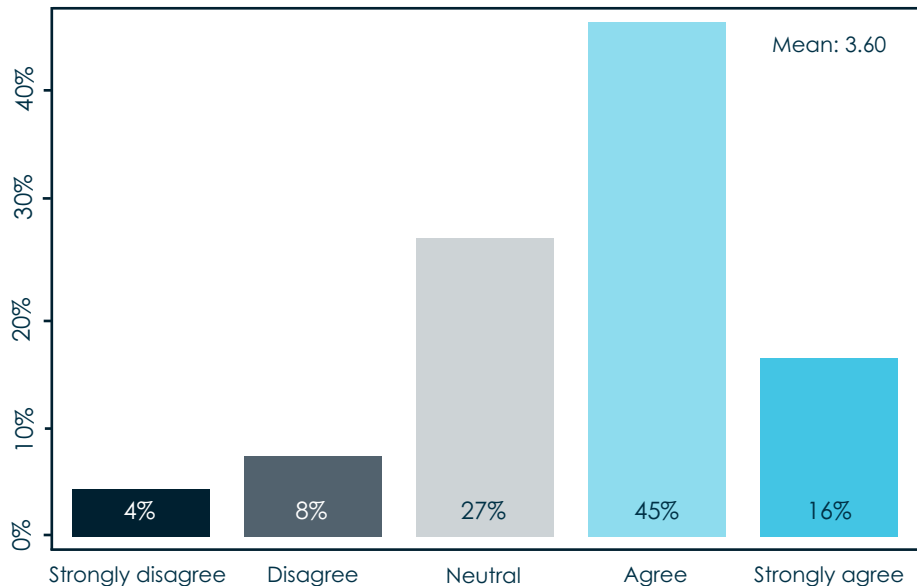


Figure 7. Ratings of live export necessity to ensure safe sources of meat

However, there was also strong agreement (61% agree versus 12% disagree) that live exports help overseas countries ensure their citizens have access to safe sources of meat (see Figure 7), improve the diets of people in those countries (55% agree, 15% disagree), and moderate agreement that it supports important cultural practices in overseas livestock destinations (42% agree, 18% disagree). On this last point, Australians also overwhelmingly feel that "it is never acceptable to lower animal welfare standards for religious or cultural reasons" (77% agreement).

SO DO THE COSTS OUTWEIGH THE BENEFITS OF LIVE EXPORT?

After survey participants had answered questions

about the positive benefits of the live export industry (e.g. economic benefits for farmers and the economy, nutritional benefits for people in destination markets) and the concerns that community members have about the industry (e.g. animal welfare), we asked them to make a judgement about the costs and benefits of the industry in Australia. Overall, responses were right around the middle of the scale used (Mean = 3.05), with 36% of participants indicating that the "costs and benefits are about equal", 36% indicating the benefits outweigh the costs to some degree and 29% indicating the costs outweigh the benefits to some degree (see Figure 8).

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

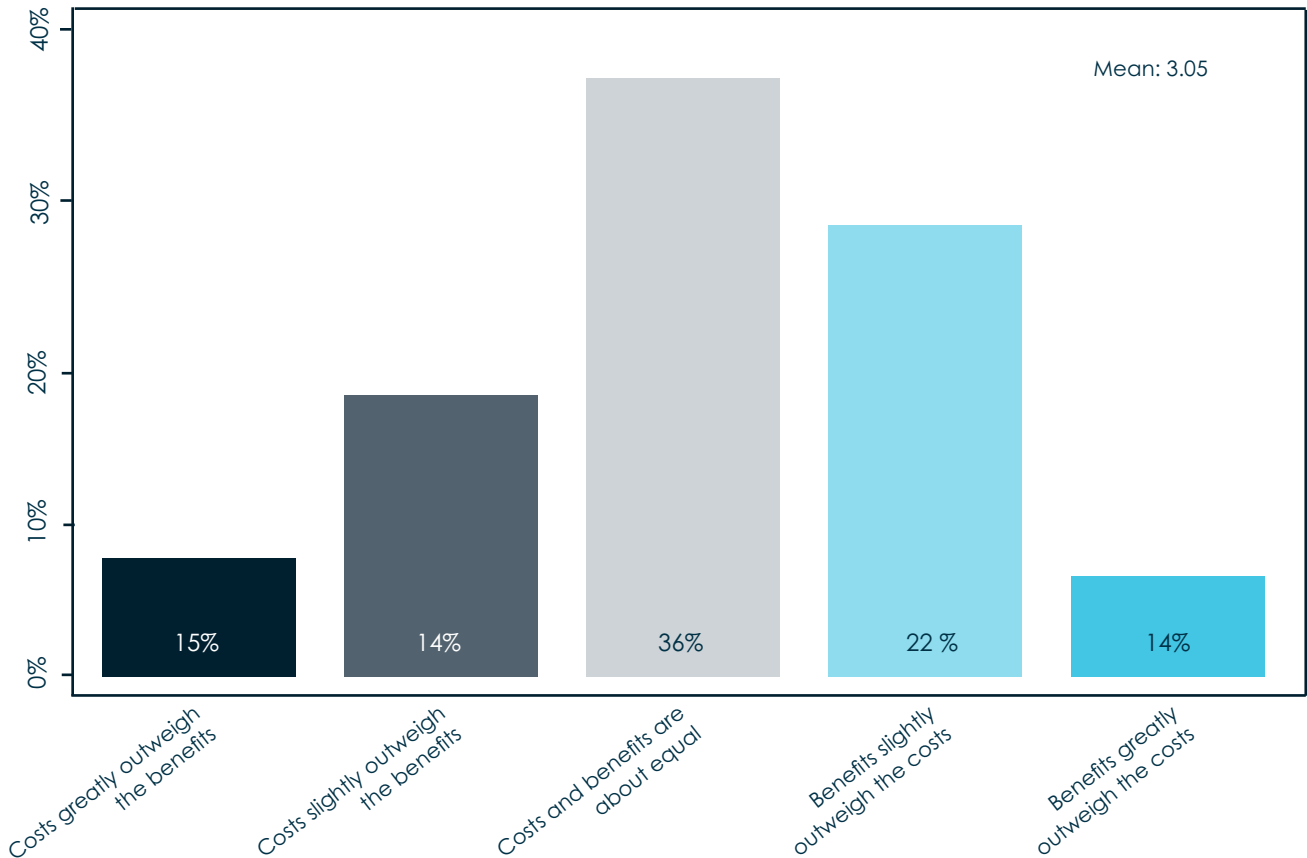


Figure 8. Ratings of costs and benefits of the live export industry

KEY INSIGHTS

Animal welfare is clearly a key issue for the Australian live export industry.

While Australians understand the benefit of live exports for people overseas in terms of nutrition, food safety and cultural or religious reasons, appropriately caring for animals is viewed as a fundamentally important part of this process.

Australians are confident in our domestic welfare standards and practices, but have reservations about the welfare standards for animals on the journey to and within overseas market destinations.

Overall, Australians currently feel that the benefits of the industry are about the same as the costs that relate to it.

THE RULES GOVERNING THE LIVE EXPORT INDUSTRY

Community confidence in an industry is connected to the conditions that government and regulators place on an industry: when community members feel the rules by which an industry must abide are clear, acceptance of an industry may be stronger. We examined confidence in the way the live export industry is regulated in Australia, and in the overseas markets where exported animals are transported.

The live export industry in Australia is regulated or conditioned in a unique way: there is regulation around how the industry operates within Australia and regulation that provides rules around how the industry operates within the destination markets. In this survey, however, we have examined broader community sentiment around the intent and perceived effectiveness of regulation, as a whole. As results below demonstrate, Australians place a

lot of faith in the formal accountability processes governing the live export industry to ensure it acts responsibly, and consequences for when it breaches these standards and regulations.

HOLDING INDUSTRY TO ACCOUNT

We asked participants in this national survey to rate their level of confidence that the Australian federal government could hold the live export industry accountable for its actions. 61% of participants agreed that the federal government is able to hold industry accountable (compared to 13% that disagreed). Looking at regulators specifically, 59% agreed that regulators of the live export industry are able to hold the industry accountable compared to 13% that disagreed (see Figure 9).

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

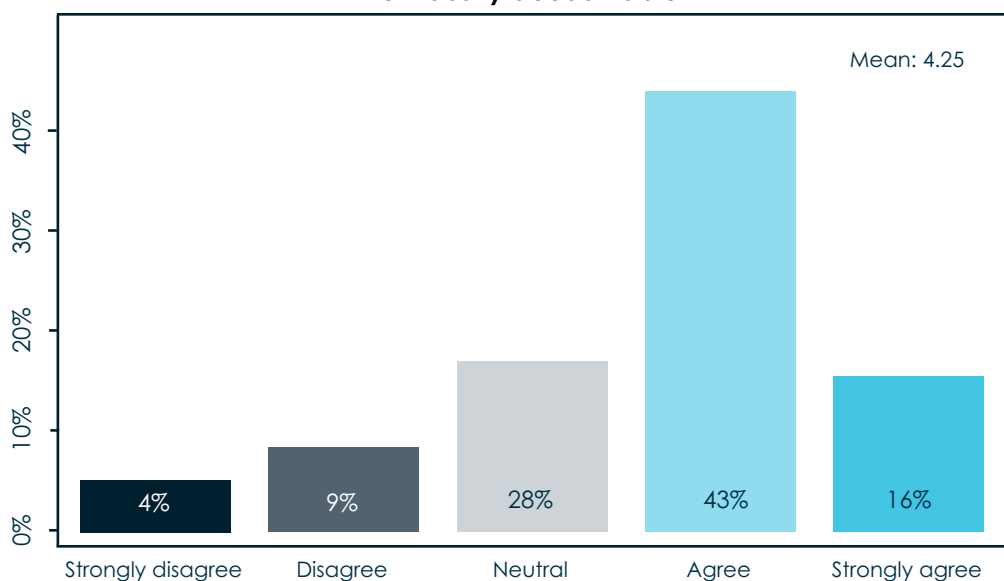


Figure 9. Ratings of regulator ability to hold the live export industry to account

Auditing, or checking that industry practice aligns with standards and conditions imposed by regulation, was very important to community members with 70% of participants indicating agreement that auditing at different points in the live export process ensures people in the industry do the right thing (9% disagreed).

Reinforcing this sentiment, 85% of participants agreed or strongly agreed that “it is important that standards for the live export industry are enforced effectively” (see Figure 10).

KEY INSIGHTS

Regulation, standards of practice, auditing and holding the live export industry accountable are seen to be very important by Australians.

Australians have strong confidence in the mechanisms in place to ensure the live export industry does the right thing, and are adamant that the rules for live export of animals should be enforced effectively.

It is important that standards for the live export industry are enforced effectively

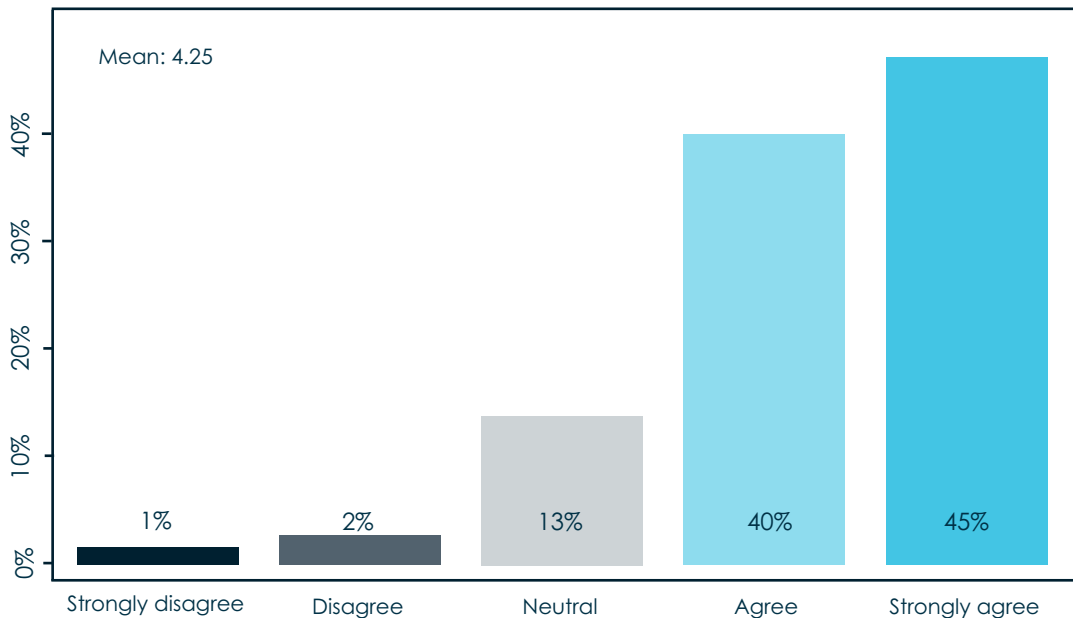


Figure 10. Ratings of importance of enforcing standards for the live export industry

THE MECHANISMS OF COMMUNITY ACCEPTANCE OF LIVE EXPORTS IN AUSTRALIA

Community acceptance of the live export industry is fundamental to its continued operation in Australia. This report so far has detailed community sentiment about a range of important aspects of the live export industry, but in this section we explore how these issues and topics relate to community acceptance of the industry in Australia. There are two important reasons for conducting 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 animal welfare in driving acceptance.³

THE PATHWAYS TO ACCEPTANCE

Using a sophisticated statistical technique called path analysis, the key drivers of acceptance of the Australian live export industry may be identified. Four distinct clusters of issues or topics were the strongest drivers of acceptance in this modelling (see Figure 11). They are, in order of their importance in driving acceptance of the industry:

1. *Animal welfare standards*

This is made up of a range of questions related to Australians' animal welfare beliefs, including the unacceptability of lowering welfare standards for religious reasons (e.g. in the animal slaughter methods of overseas markets), personal disposition toward meat production in general and a responsibility of exporters for an animal's welfare for its whole life. We found that how participants responded to this cluster of questions was influenced

by the following issues:

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

As expected, animal welfare concerns are central to the acceptance of the live export industry. When concerns about how animals are treated within the live export industry are higher, acceptance of the industry is lower.

2. *The value of live exports to people overseas*

The nature of this driver is very clear; the more that Australians feel that the live export industry is supporting the needs and nutritional aspirations of people overseas, the more they accept the live export industry. This driver also positively influences the cost/benefit evaluation of the industry by Australians.

3. *Trust in the live export industry*

The more that the community trust the live export industry to act responsibly, the more they accept the industry. Trust was also related to animal welfare concerns (Driver 1, above) such that the more that community members trust the industry, the less strongly they feel about those specific welfare concerns as a deal breaker for live exports (e.g.

³ Analyses revealed a degree of uncertainty among Australians about the way the live export industry operates as reflected in the proportion of community members that chose 'middle scores' on the 5-point Likert scales employed. Future research will explore in more detail the nature of this uncertainty.

welfare standards are universal and not contingent on cultural context, discomfort around meat

production, and no limit to an exporter's responsibility for the welfare of animals). Higher trust in this context is likely to relate to confidence that standards and strong welfare conditions are being applied, despite not having a great deal of knowledge about exactly how that is taking place currently.

4. Overall value proposition for the industry

This driver was all about the extent to which community participants feel that the benefits of the

live export industry outweigh the costs. We found that these judgements were influenced by:

- The economic value of the industry to Australia, farmers and regional communities
- The responsibility of exporters to ensure the welfare of animals no matter who owns them in market
- The necessity of live exports for people in other countries
- Industry responsiveness to community concerns.



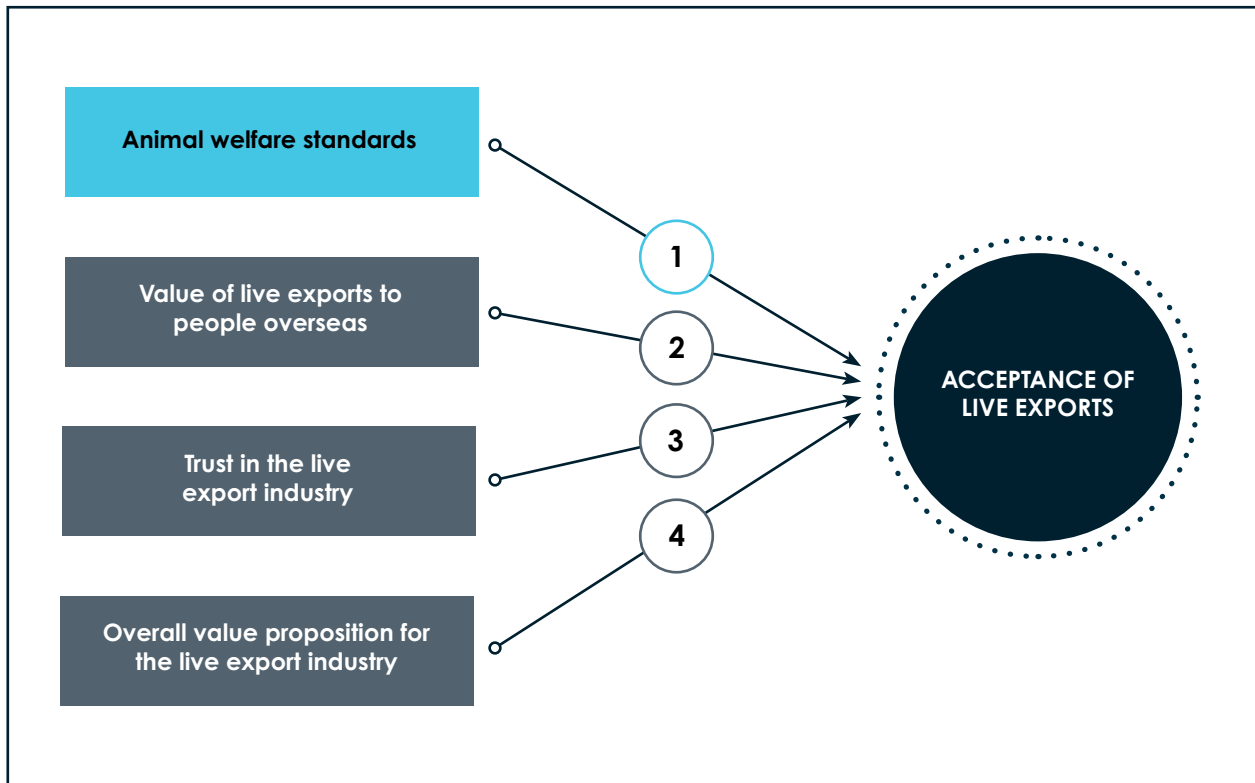


Figure 11. A stylised diagram of the acceptance path model for the live export industry

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; for example, trust leads to acceptance. The numbers on the arrows reflect their relative importance in driving acceptance of the live export industry. The blue pathway is a negative relationship (e.g. the more strongly people feel about animal welfare the less accepting of the live export industry they are) while all other pathways in this model are positive (e.g. the more people trust the industry to act responsibly the more they accept the industry).

CONCLUSION

This report provides a summary of community attitudes toward the Australian live export industry. A national, broadly representative sample of 4,830 Australians over the age of 18 years contributed to a deeper understanding of the nature of the relationship between this industry and the Australian people.

KEY FINDINGS

This national survey of community attitudes demonstrated that the relationship between the live export industry and the Australian people is complex. While Australians feel strongly that the live export industry makes an important economic contribution to Australia's economy, to farmers that produce animals for export, and the communities in which these farmers live and work, community members have strong reservations about key parts of the industry and its practices.

Australians value the role that the live export industry plays in contributing to the nutrition of people in overseas markets where animals are exported, their access to safe sources of meat, and their ability to perform cultural practices that are important to them. Australians indicated even more strongly, however, that the welfare of animals in the live export industry should not be compromised to accommodate these cultural practices. Community members also indicated low levels of trust in the welfare standards of destination markets for live animals, and strong concern about the welfare of animals being transported to and then within these destination markets.

Trust in the live export industry to act responsibly, and overall levels of acceptance of the industry by the Australian community were below the midpoint of the scale used, reflecting the strength of the concerns that many Australians expressed.

Australians also indicated strongly that governance, regulation and industry standards are important to provide assurance that the industry may be held accountable and to ensure that it acts responsibly.

However, those community members surveyed expressed moderate agreement that the live export industry is responsive to community opinions and willing to change how it operates in response to community concerns. Community members also felt, on average, that the costs and benefits of the live export industry are in an even balance, currently. Looking across the patterns in these data, it is clear that Australians are wrestling with a complex array of issues and challenges associated with the live export industry.

To this point, on a range of items related to live export practices, standards and animal welfare safeguards, community members indicated moderate to high levels of neutral responding. This may indicate genuine lack of conviction one way or another on particular topics but may also indicate a level of uncertainty about how the industry operates that will be the focus of future research. Supporting an informed, constructive conversation about the conditions for acceptable practices within the live export industry is a key priority for this project.

Path analyses included in this report provide a clearer understanding of the pathways to community acceptance of the live export industry. These analyses showed that animal welfare beliefs

associated with strong personal, principled positions around meat production, lack of compromise on welfare standards and taking responsibility for an animal for its whole life were the strongest driver of acceptance. We also found that the strength of community views on these aspects of animal welfare were influenced by the level of responsiveness of the industry to community concerns. Where community members feel that the live export industry is open to change and responding effectively to the concerns of community members, space is created for a constructive dialogue about the terms for ongoing industry acceptance. These analyses also showed that increasing acceptance of the industry is dependent on the role that live exports play in supporting the development goals of citizens in overseas markets for Australian livestock, improving trust in the industry to act responsibly and a strong positive value proposition where the benefits of the industry outweigh its costs in the minds of Australia's citizens. This represents significant challenge for the live export industry in Australia and a constructive, focused pathway for engaging Australians on the challenges and benefits the industry delivers for this country and the countries where our livestock are exported.

This first baseline piece of research for the live export industry examining community trust has delivered a more nuanced, complex story about the relationship that this industry has with the Australian community than may be apparent in public conversation about the industry. The data in this report clearly showed that when a significant, broadly representative sample of Australians is engaged about the full breadth of the live export industry, and when this data is analysed with the express purpose of accommodating rather than reducing this complexity, the results are layered.

Australians feel strongly about the welfare of animals, about how they are treated through many of the stages of the live export industry as they move from pasture to export market. What was also clear is where the industry may focus to engage Australians effectively in this most contentious of areas; the industry's future is largely in its own hands. Australians expect the live export industry to be responsive to their concerns, to demonstrate its willingness to listen, to learn and to change where its activities are not aligned with community expectations.

Australians also recognise and have articulated here, that Australia's farmers and regional communities are valued, that their role in Australian society is important, and their livelihoods and position in this country are central to our national story. Community members see and recognise the economic importance of the live export industry to Australia; they also have firm conditions under which this trade is acceptable. Most importantly, this work showed that the live export industry is not one dimensional in the minds of Australians, and that future discussion about the industry would benefit from acknowledging the broader context in which it operates.



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