

# LIVE EXPORTS AND THE AUSTRALIAN COMMUNITY 2019-2021

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A national program of  
community sentiment research





## CITATION

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## RESEARCHER CONTACT DETAILS

Dr Kieren Moffat  
Voconiq CEO and Co-founder  
[info@voconiq.com](mailto:info@voconiq.com)

## VOCONIQ, OUR STORY

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

*To learn more, go to [voconiq.com](https://voconiq.com)*

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



# INTRODUCTION

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*The live export industry plays an important role for Australian livestock farmers and those that buy fresh meat or utilise breeding stock in destination countries. The industry creates employment in Australia and overseas, meets the needs of community members in destination markets and is part of the larger ecosystem of agricultural industries that keep rural and regional Australia strong. But the journey these animals take from farm to market or paddock is a challenging one for many Australians. For the Australian live export industry, understanding and responding to community concerns is a critical task to ensure that it is able to operate in line with broader citizen and government expectations.*

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In 2019, the service provider and research body for the Australian live export industry, LiveCorp, embarked on a multi-year program of research to understand community views in new ways, and to engage with and respond to the community around the industry. The service provider for livestock producers, Meat & Livestock Australia, became a partner in the research in 2021, through the Livestock Export Program jointly funded with LiveCorp. This report details findings from the second national survey of community sentiment toward the live export industry in this program of work, providing an update to and comparison with data collected in 2019-20.



# THE RESEARCH PROCESS

**In the first year of the program, Voconiq researchers conducted an extensive stakeholder engagement process around the country, a media analysis and desktop review of documents and reports to inform the design of a comprehensive survey instrument. This instrument was used to survey a large sample of Australians representative of the population by age and gender, collected online in late 2019/early 2020 from across the country. This instrument was refined for the second national survey 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. These refinements were also informed by extensive engagement of industry stakeholders with the baseline data.**

As the second survey in a multi-year program of research, this report provides comparisons of responses from both national surveys conducted to date. These two surveys were conducted approximately two years apart, providing an excellent opportunity to see how community views may have changed in that time.<sup>2</sup>

As in the baseline research, this second national survey was conducted online utilising a research panel. Participants from across Australia were invited to complete the survey to ensure an inclusive, representative sample was collected. Participants were over 18 years of age.

The main body of data was collected between 3 September and 10 October, 2021. Of the 6,537 surveys completed, 4,411 were included for analyses after data cleaning. A significant portion of the surveys that were removed from the data set were automated 'bots' detected by our data cleaning process<sup>1</sup>, and several hundred additional surveys were collected in late November to ensure the sample was broadly representative of the Australian population by age and gender.

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<sup>1</sup>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). Responses were also removed where they appeared to be non-human robots (i.e. 'bots') detected via proprietary Voconiq data tools. For more detail on data cleaning, see Meade AW and Bartholomew C. (2012) Identifying careless responses in survey design. *Psychological Methods*, 17(3), 437-455. DOI: 10.1037/a0028085.

<sup>2</sup> It is important to note that the onset of the COVID-19 pandemic occurred immediately after the first-year survey data was collected. In examining this second data set it appears that community sentiment has somewhat 'normalised' within this disrupted context in relation to the live export industry and rural industries more generally. This is based on datasets collected by Voconiq relating to other rural industries throughout the last 18 months which showed the pandemic did influence community sentiment but that this influence has decreased over time.



## WHAT DID WE MEASURE?

**As with the baseline research, the second national survey examined community attitudes toward all components in the live export value chain. As captured in 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 frameworks within which the industry operates at different stages of this process. There is also strong overlap between the live export industry and several other agriculture industries. The survey instrument seeks to reflect as much of this breadth and nuance as possible.**

As in the baseline survey, and following an information and consent process within the survey introduction, we included a comprehensive set of demographic measures. We then included questions relating the following areas:

- Information sources about the industry,
- Attitudes toward meat eating and animal welfare,
- The position of agriculture, animal farming, and live exports in Australia,

- Attitudes toward different parts of the live export supply chain (e.g. transport within versus from Australia),
- Value proposition elements for the industry (i.e. economic value to Australia and the value of fresh meat 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.

Participants were also invited to make comments at two points in the survey, once after an item regarding different parts of the supply chain and a final opportunity at the end of the survey. Quotes that illustrate or elaborate on the broader sentiment data reported here are included throughout this report.

New in 2021, we included items examining community members' knowledge of mortality rates on live export ships, additional animal welfare items, and more detail on community concerns about the nature of mortality events on live export vessels.





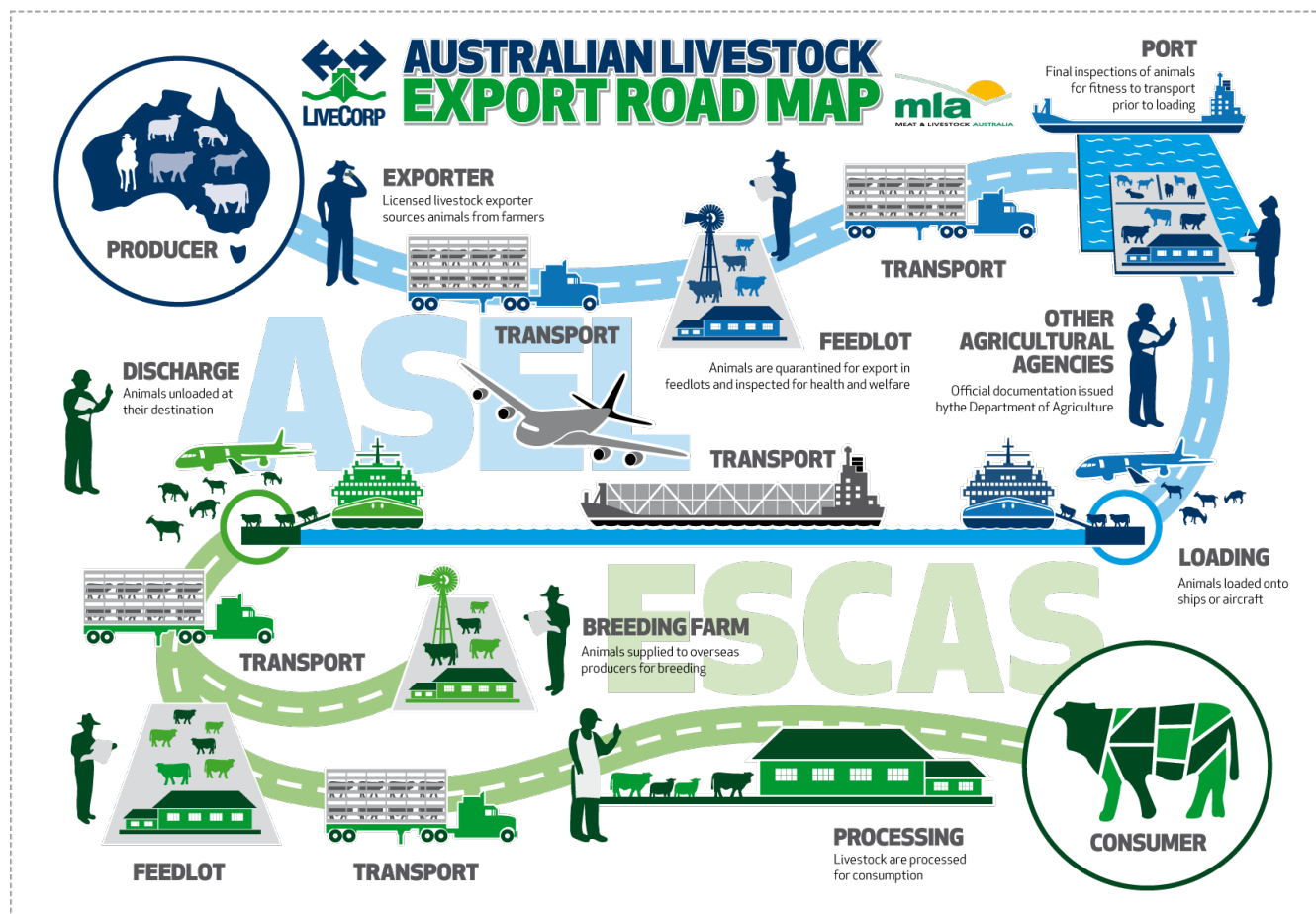


Figure 1. Australian livestock export industry road map (LiveCorp 2020)



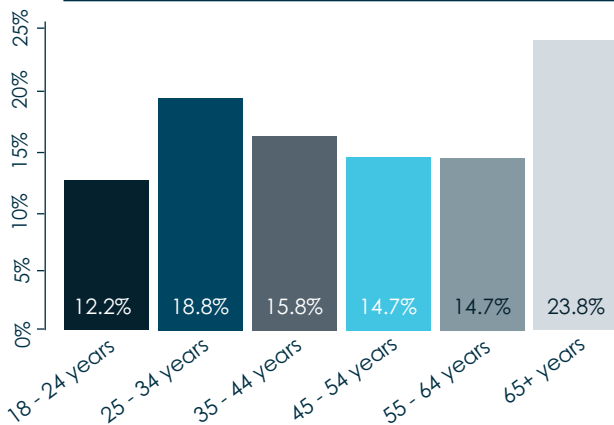
# RESEARCH PROGRAM PARTICIPATION 2019-2021

**4,380** INCLUDED SURVEYS  
AT TIME 1 (2019-2020)

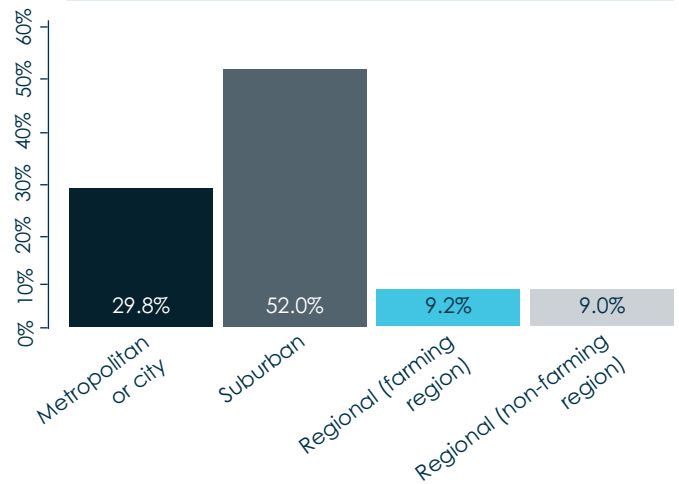
**4,411** INCLUDED SURVEYS  
AT TIME 2 (2021)

**8,791** COMBINED  
PARTICIPANTS

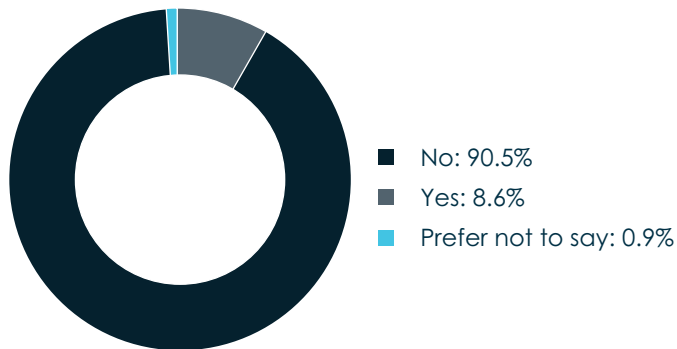
AGE OF PARTICIPANTS



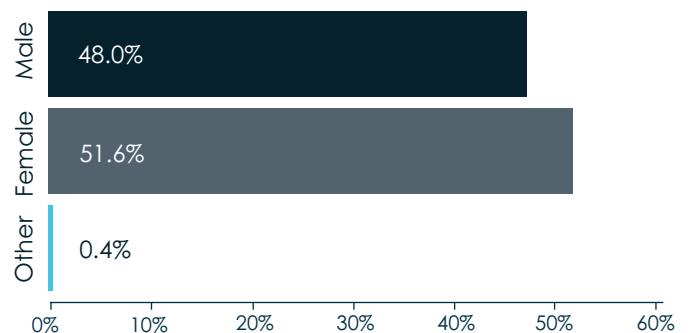
RESIDENCE BY LOCATION TYPE



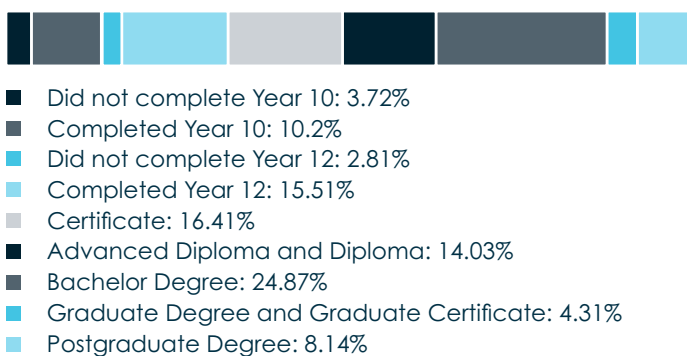
Aboriginal and Torres Strait  
Islander peoples status



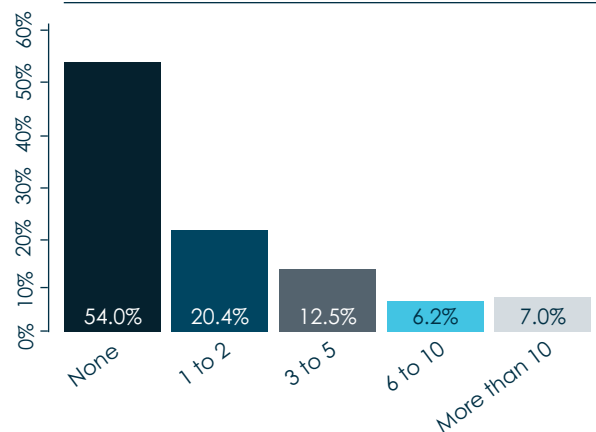
GENDER



EDUCATION LEVEL



NUMBER OF PEOPLE KNOWN THAT WORK  
IN AN AGRICULTURAL INDUSTRY





# THE POSITION OF THE LIVE EXPORT INDUSTRY IN AUSTRALIA

One of the key aims of this program of work is to understand the position of the live export industry within a larger context of community sentiment. The industry is often discussed with reference to single issues without regard for the larger role of the industry in Australia or the multiple ways in which it may be perceived to deliver benefits to the country. We start this examination of the broader context within which the industry is located with its economic contribution.

## CONTRIBUTION OF THE INDUSTRY

The live export industry is seen by Australians to deliver important economic benefits for the country and for farming communities that produce livestock for export. Comparing the baseline with the most recent data (see Figure 2), we can see that the proportion of participants that either 'agreed' or 'strongly agreed' with these statements was high and

increased on both measures over the last two years.

Moreover, Australians recognise that these farming communities would suffer economic hardship should the industry discontinue, with agreement on this measure increasing from the baseline survey. The live export industry is also seen to be an important part of the larger agricultural sector, sentiment that has strengthened since 2019.

Finally, the proportion of community members that indicated the live export industry bothers them decreased appreciably over the last two years. This decrease was similar in magnitude to increases in positive sentiment toward the industry's place in the Australian economy.

## VALUE OF THE LIVE EXPORT INDUSTRY

Several comments were made regarding the importance of the live export trade for Australian farmers and the economy more broadly.

“Australian farmers set some incredible standards for its farming which makes so much of our farmed product so highly sought after globally.”

“I think the animal export industry is an important part of Australian farming as it brings in income dollars to farmers which in turn helps the Australian economy.”

“Industry could be improved, but is an essential part of our economy.”

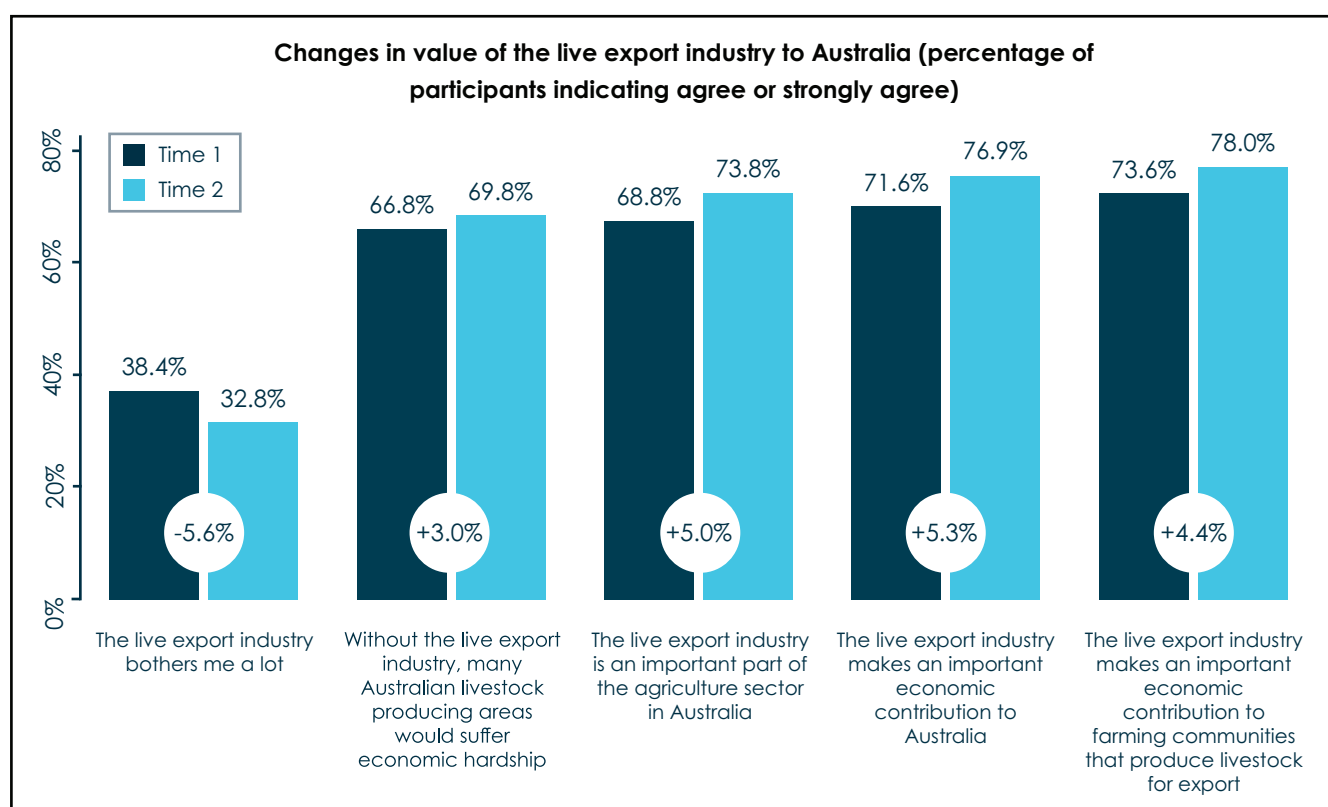
“Please keep the industry going as it is very important to our farmers who get the rough end of the pineapple all the time.”

However, others made comments suggesting that live exports impact on Australian jobs.

“Australia should only export processed boxed meat overseas, by doing this there would be more jobs for Australian butchers in this country.”

“Export the processed meat, not the jobs.”





**Figure 2. Percentage of agreement with importance items 2019-2021**

However, when we asked participants the extent to which they agreed that the industry should stop exporting animals overseas regardless of the impact on Australian farmers, responses in this most recent survey were very similar to those recorded in 2019. Largely equal proportions of participants agreed (34%) and disagreed with this statement (36%), with 30% neutral in 2021.<sup>3</sup>

## TRUST IN AND ACCEPTANCE OF THE INDUSTRY

A key outcome measure for this work is the extent of trust in and acceptance of the live export industry by Australians. 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 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. In 2021, that score increased slightly to 2.96. This improvement has been driven in large part by a shift in sentiment from lower scores (i.e. 1 and 2 on the 5-point scale) to more moderate responses (i.e. 3 on the 5-point scale). The live export industry remains more trusted than the federal government (Mean (M) = 2.86).

In the 2021 research, we sought to drill deeper into 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 marginally higher (M = 3.40) than for livestock farmers that do supply animals for export (M = 3.34), although trust in 'livestock farmers' (as it was measured at baseline) decreased from 3.54.

<sup>3</sup>Throughout this report, the term 'neutral' refers to selections made by participants on the response scales provided in the survey instrument. Using a 5-point Likert-type scale, participants could choose a middle response labelled "neutral" (i.e. '3' on a numbered scale from 1 to 5).



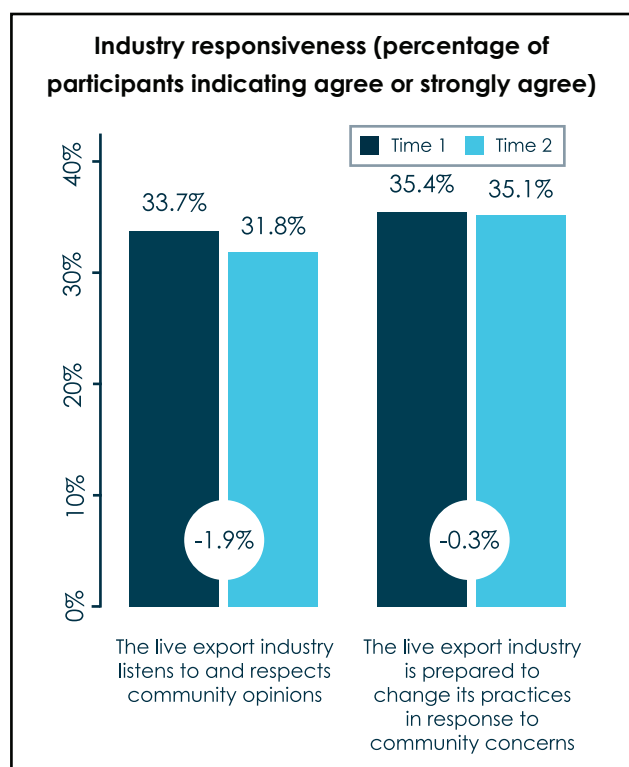
## RESPONSIVENESS OF THE INDUSTRY

In the first national survey of community attitudes toward the live export industry, responsiveness to community concerns was a strong driver of trust in the industry. We used the same measures of responsiveness, or procedural fairness, in the second national survey for comparison purposes. As shown in Figure 3, there was no real change in the proportion of citizens that agreed or strongly agreed that the industry was willing to change its practices in response to community concerns, and a small decrease in agreement that the industry listens to community concerns. The average score for preparedness to change was above the mid-point of the scale used (i.e. more people agreed than disagreed with the statement; see Figure 3), with a large proportion of participants indicating a neutral response (41%).

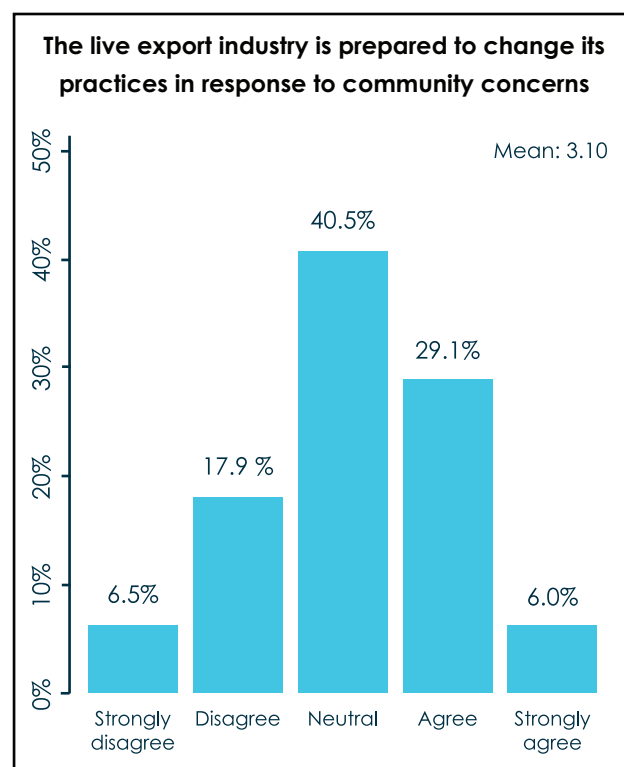
## KEY INSIGHTS

Community sentiment that the live export industry is important for livestock farmers and the Australian economy, and an important part of the broader agriculture sector in Australia, strengthened over the last two years. The number of people that indicated they were “bothered by” the live export industry also fell in this time.

Trust in the industry remained steady at around the midpoint of the scale used, as did ratings of the industry's responsiveness to community concerns. As in 2019, while there is room to improve on these relational measures, this latest data indicates a modest improvement in the background community sentiment.



**Figure 3. Percentage of agreement with responsiveness items 2019-2021**



**Figure 4. Distribution of responses and average score for willingness to change 2021.**







# ANIMAL WELFARE

**Animal welfare remains a key element of the national discussion about the live export industry in Australia and elsewhere. We explored this critical issue on multiple dimensions. In addition, in this section we explore elements of the industry's value proposition for Australia, and the places and people that receive our livestock.**

## WELFARE ACROSS THE SUPPLY CHAIN

In 2021 we included a stylised map of the journey that livestock make from Australian farms to point of sale in overseas destinations, developed by LiveCorp. We asked participants to click once on the image to indicate where in the live export supply chain they had the greatest level of concern. Participants were also informed that if they did not have any concerns, they could skip this part of the survey. Of the 4,411 surveys included for analysis, 2,338 participants (53%) chose to click on the supply chain image and 2,073 (47%) did not.

Figure 5 shows a heat map representing the output from this survey item. The parts of the live export supply chain where community members completing this item had the greatest concern are those with the largest heat signature. The majority of clicks occurred on the "voyage" section as animals are transported from Australia to overseas destinations. This was followed by "processing" overseas and then "in-market transport" and in-country "wet market/retail". Participants completing this item were least concerned about conditions on Australian farms and in quarantine feedlots.

While the sea-bound voyage of animals attracted by far the greatest number of clicks on the diagram, all elements of the supply chain attracted some clicks. Given participants could only click once, this suggests a diversity of perspectives within the community about where in the supply chain they have a concern.

## UNCERTAINTY DRIVES CONCERN

**When we asked participants to describe why they had chosen the component of the supply chain that concerned them most, many people spoke to their uncertainty about what happens on the voyage or once animals are perceived to be outside of the Australian chain of custody:**

“So many deaths happen in transit and then you can't guarantee how the animal is treated once landed at destination.”

“Not sure how it's done but I'd guess not handled well.”

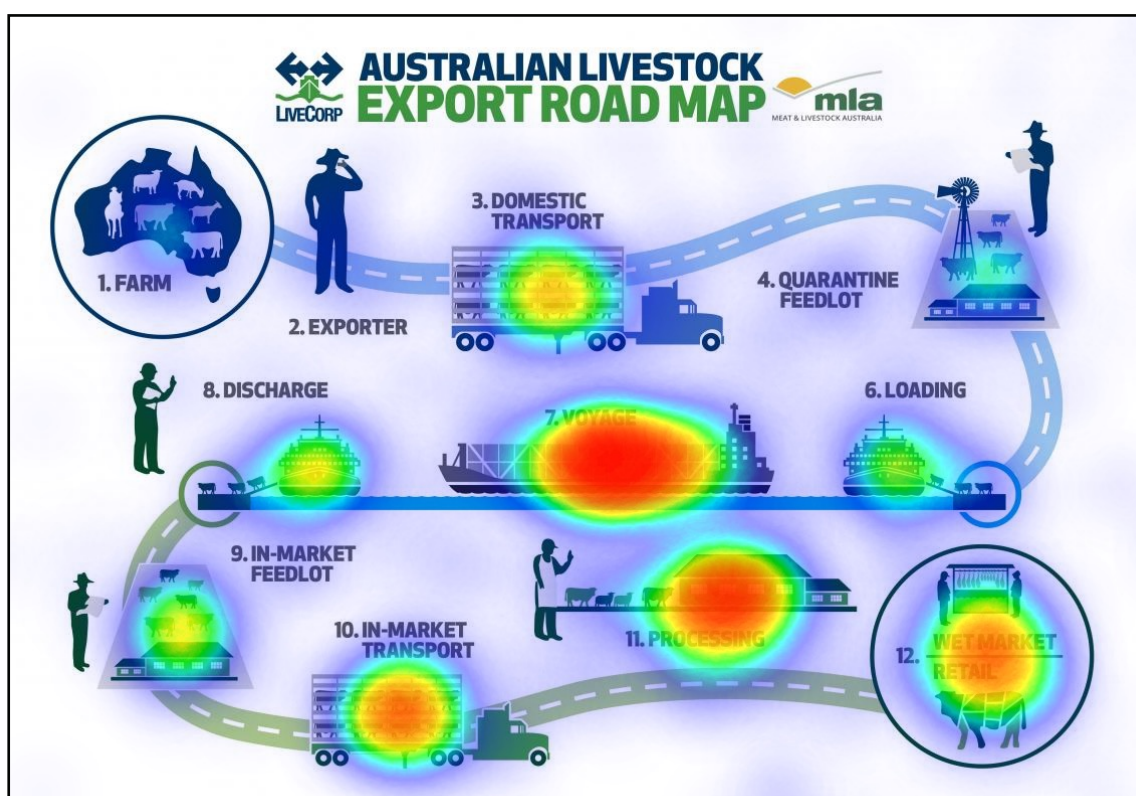
“Less control of the animals once they leave Australia.”

“Once the animal is loaded we have no control over animal welfare.”

“There appears to be too many unknowns about the welfare of animals once they leave the ship.”

“Once the animals are overseas I am not confident the same animal rights guidelines that we follow in Australia are followed by foreign countries.”





**Figure 5. Location and frequency of participant 'clicks' on the live export supply chain process map (larger circles indicate higher number of 'clicks').**

We also asked a series of questions that examined attitudes toward 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-country, and the treatment of animals in export markets more generally (see Figure 6 for a multi-year comparison of these items).

In general, sentiment improved over the last two years regarding the treatment of animals throughout the supply chain, although concern remains high. Notably, the area where participants indicated greatest concern in the heatmap diagram (Figure 5, the "voyage" component of the supply chain) was also the area where community sentiment improved the most since the first national survey in 2019. On this item, the proportion of participants indicating

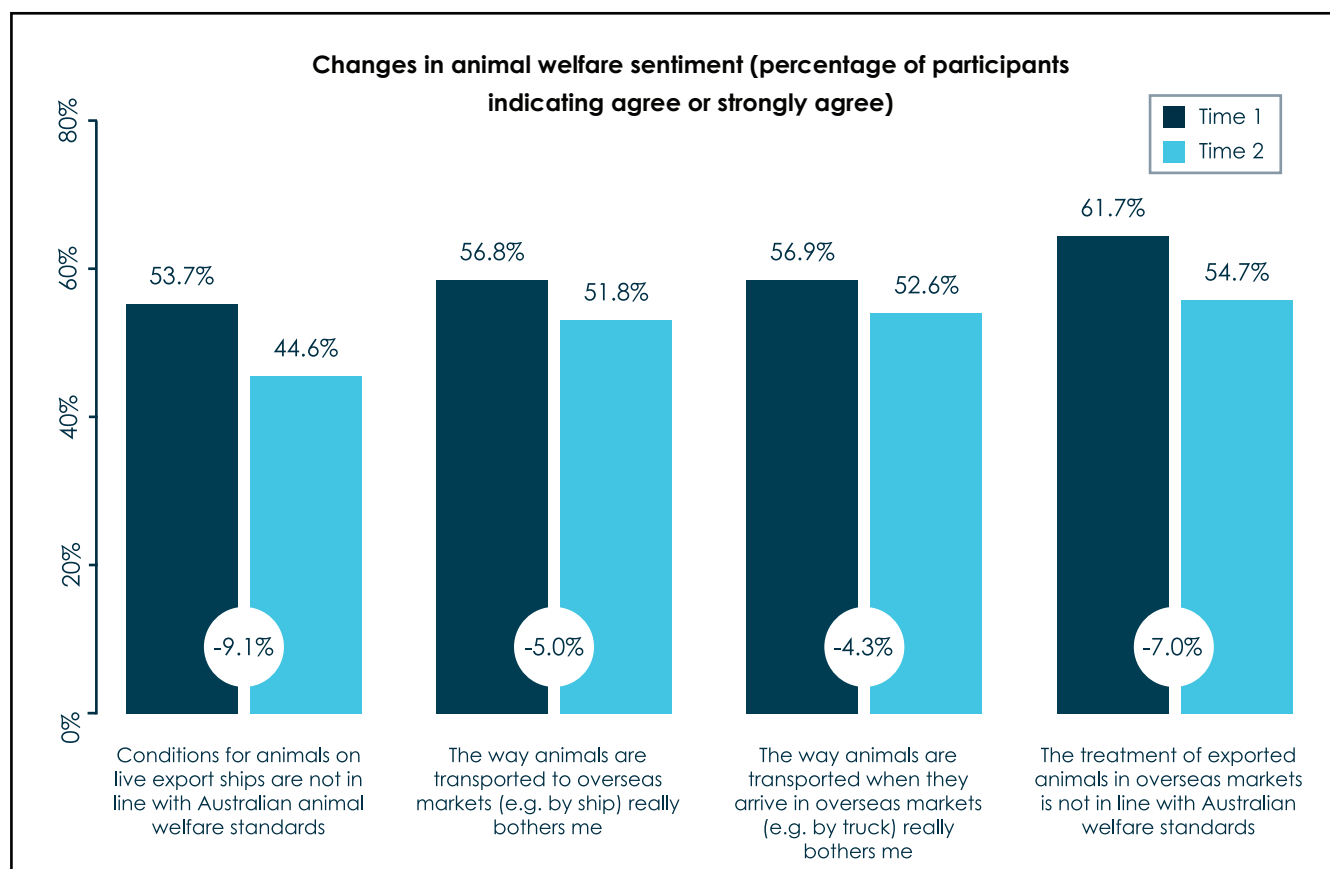
agreement that "conditions for animals on live export ships are not in line with Australian animal welfare standards" decreased by 9.1%, from 53.7% to 44.6%.

To explore animal welfare in more detail, two new items were added in the 2021 survey. 72% of participants agreed or strongly agreed that "Animal welfare in the live export industry is a complex issue", with just 6% indicating that they disagreed or strongly disagreed with this statement and 22% neutral. 62% of participants agreed or strongly agreed that "The welfare of animals is not just about the absence of harm to them", with only 6% disagreeing or strongly disagreeing and 31% neutral. These new items highlight that most Australians take a broader view of what constitutes good practice around animal welfare and understand the complexity of managing livestock within the export supply chain. However, concern remains regarding how animals are treated in their destination countries.

<sup>4</sup>The original road map may be found here:

[https://images.ctfassets.net/8fjsq0xyf4sy/3loUv9eqElwyHDUTqc2kkT/3ce7c70f26e434315a57f5603bc65fae/Generic\\_roadmap.png](https://images.ctfassets.net/8fjsq0xyf4sy/3loUv9eqElwyHDUTqc2kkT/3ce7c70f26e434315a57f5603bc65fae/Generic_roadmap.png)





**Figure 6. Percentage of agreement with welfare items 2019-2021**

## KEY INSIGHTS

There is a diversity of perspectives about the live export industry within the community. Overall sentiment toward the treatment of animals in the live export supply chain improved since the baseline study, and new items included in the 2021 survey show that community members hold nuanced views around animal welfare.

The voyage component of the live export supply chain remains the area of greatest concern among those community members that chose to express their concerns using the supply chain diagram. However, it's important to note that only 53% of the sample chose to click on this diagram.

# THE BENEFITS OF LIVE EXPORTS FOR DESTINATION MARKETS

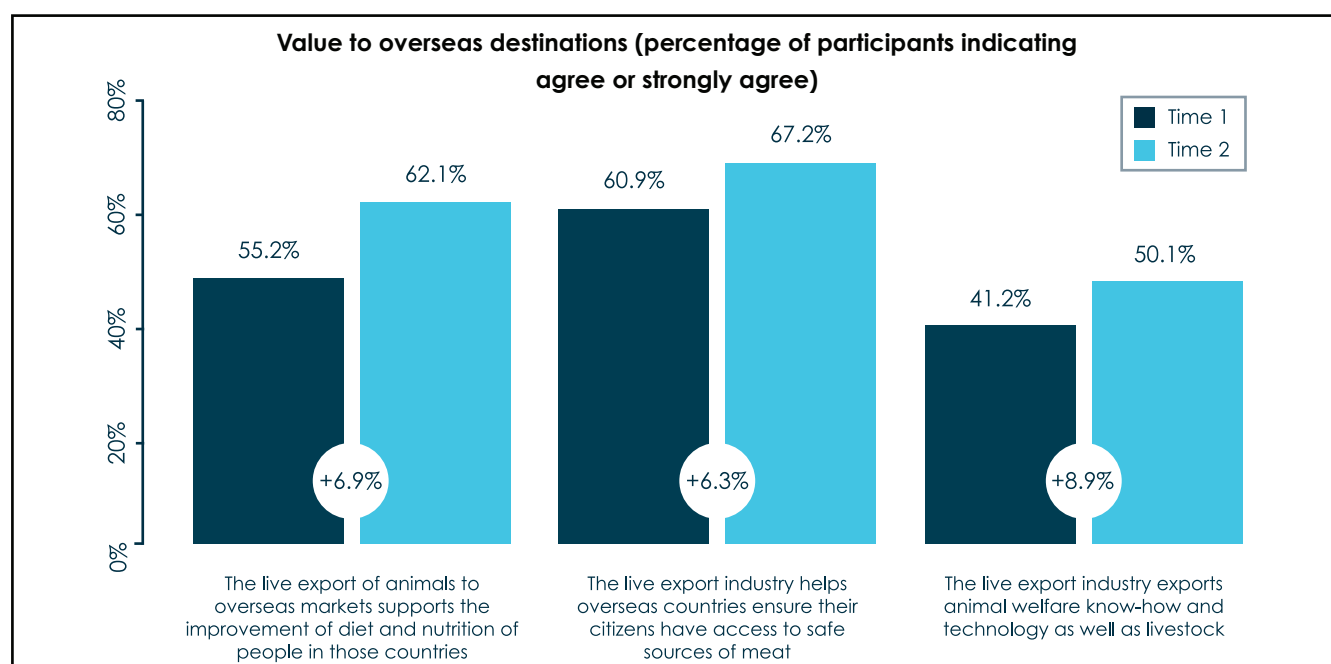
**In 2019, we found that Australians clearly recognised the benefits of the live export industry to people living in destination markets. Two years later, this positive sentiment has strengthened significantly (see Figure 7). The industry is seen to support the improvement of diet and nutrition of people in destination countries and help to ensure that these people have safe sources of meat available.**

The strongest improvement in sentiment was observed for benefits beyond the transaction itself, with 50% of participants now in agreement that the industry exports know-how and technology as well as livestock. Two additional items in 2021 extended this to examine the benefits of breeding stock exported to overseas destinations. 65% of community members agreed or strongly agreed that "Exporting breeding stock to overseas countries helps them to ensure their own food security" (8% disagreed and 30% were neutral), and 62% agreed that breeding stock

"improves the genetic quality and diversity of their animal herds" (7% disagreed and 28% were neutral).

Tapping into this demand-side set of benefits, we asked participants to respond to the following counter point: "It doesn't matter to me if there is overseas demand for the animals, we shouldn't export them from Australia". As in 2019, responses were split quite evenly in 2021 with 38% in agreement, 32% disagreeing and 30% indicating neutral on this statement.

Moreover, 75% of participants in 2021 agreed or strongly agreed that "It is never acceptable to lower animal welfare standards for religious or cultural reasons", and 66% of participants agreed that animals are treated better in "Australian domestic meat production processes" than they are overseas.



**Figure 7. Percentage of agreement with overseas value items 2019-2021**



## MULTIPLE PERSPECTIVES

**Many community members left comments that acknowledged the complexity of the issues within the live export industry, with several referencing their own decision making regarding consumption of meat.**

“Live export is a win win for both countries and the relevant populations concerned. I have seen this in several Asian countries.”

“I think most people are very concerned about how animals are treated/mistreated when being transported to overseas countries. I hate seeing any animal mistreated and I hope that the relevant authorities are doing everything they can to keep all animals as comfortable as possible during transport.”

“It is such a complex issue, the well being of farmers and their lives and livelihoods, versus animals lives and theirs. Very complex.”

“This is a very complicated issue, especially considering I have trouble justifying my own meat consumption.”

“I believe that a live export trade should not be necessary for animals which are to be used as food and slaughtered; I believe that live export of animals for breeding and farming should be allowed but can be done by air making these live export carriers unnecessary.”

“This is a very complex practice but one I believe is necessary.”

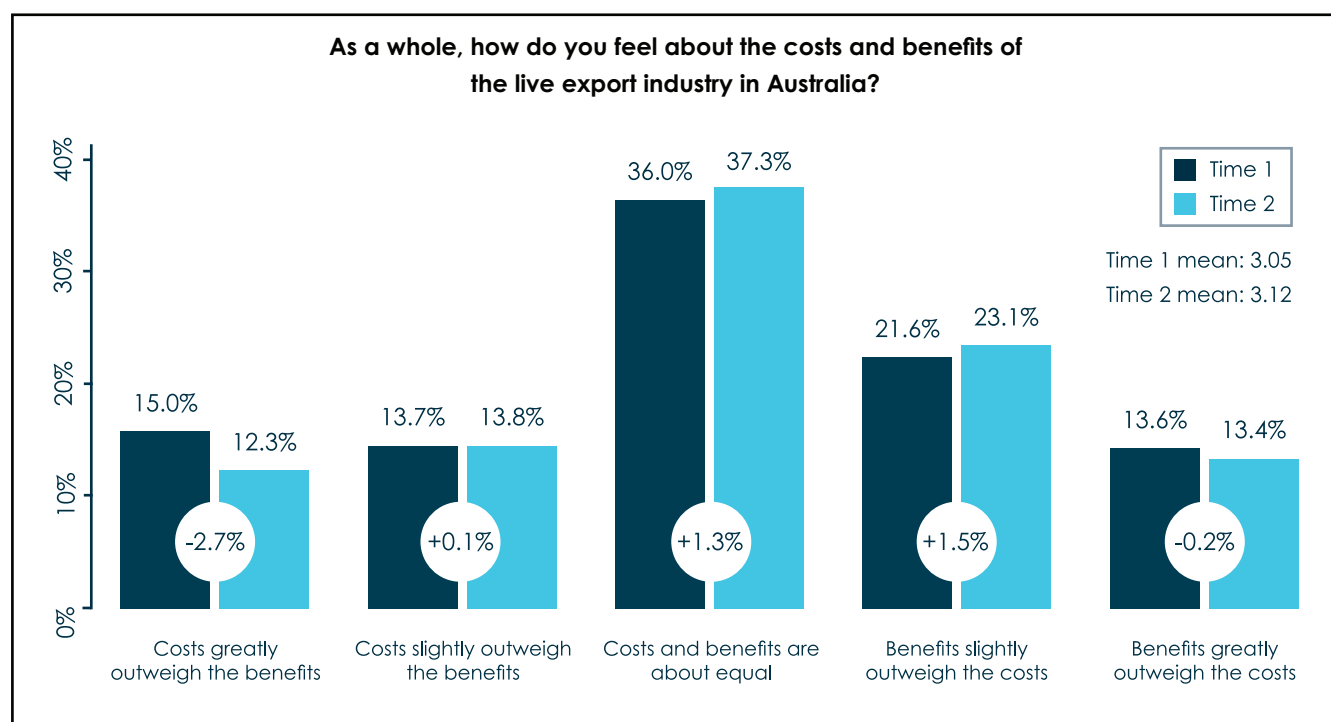
“Have no problem with eating meat. But the animals that are giving their lives for us deserve to be treated with kindness, respect and have the best life possible before ending up on our dinner plates.”



# THE VALUE PROPOSITION FOR LIVE EXPORTS

As in 2019, in 2021 we wanted to explore how community members feel about the live export industry overall, having considered the positive benefits the industry brings to Australia, farmers and overseas destinations and the areas of broad public concern (i.e. animal welfare at different points in the supply chain). Following questions about these positive areas and challenges, we asked participants "As a whole, how do you feel about the costs and benefits of the live export industry in Australia?" Participants responded 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 within community about the costs and benefits of this industry for Australia. In 2021, this evaluation improved to an average score of 3.12, reflecting improvements on measures of benefit for people in overseas destinations and a slight easing in concern around animal welfare. Examining the distribution of scores on this measure, this improvement has been driven by a reduction in the proportion of community members indicating "Costs greatly outweigh the benefits" of the industry, from 15% of the sample in 2019 to 12% in 2021 (see Figure 8).



**Figure 8. Distribution of responses for value proposition items 2019-2021**



## KEY INSIGHTS

Australians strongly feel the benefits are significant for people living in overseas destinations for our livestock. These benefits include nutrition, access to fresh and safe meat, and the export of technology and know-how to grow the capacity of destination markets to handle and process livestock in line with Australian standards.

These improvements are tempered by the very strong view among Australians that welfare standards must always be met regardless of cultural context. Overall, among a large representative sample of Australians, the value proposition when considering the costs and benefits of the industry strengthened modestly over the last two years.





# ACCEPTABILITY OF MORTALITY RATES ON LIVE EXPORT SHIPS

**In 2021 we went deeper into the most challenging part of the live export supply chain for most Australians: the voyage taking Australian animals to overseas destinations. To do this, we began by asking participants to estimate the rate of sheep mortality on a typical export voyage to the Middle East. We then presented the actual average mortality rates for both sheep and cattle for all voyages in 2020 and asked participants the extent to which this was higher or lower than they expected, followed by a series of questions teasing apart these issues further.**

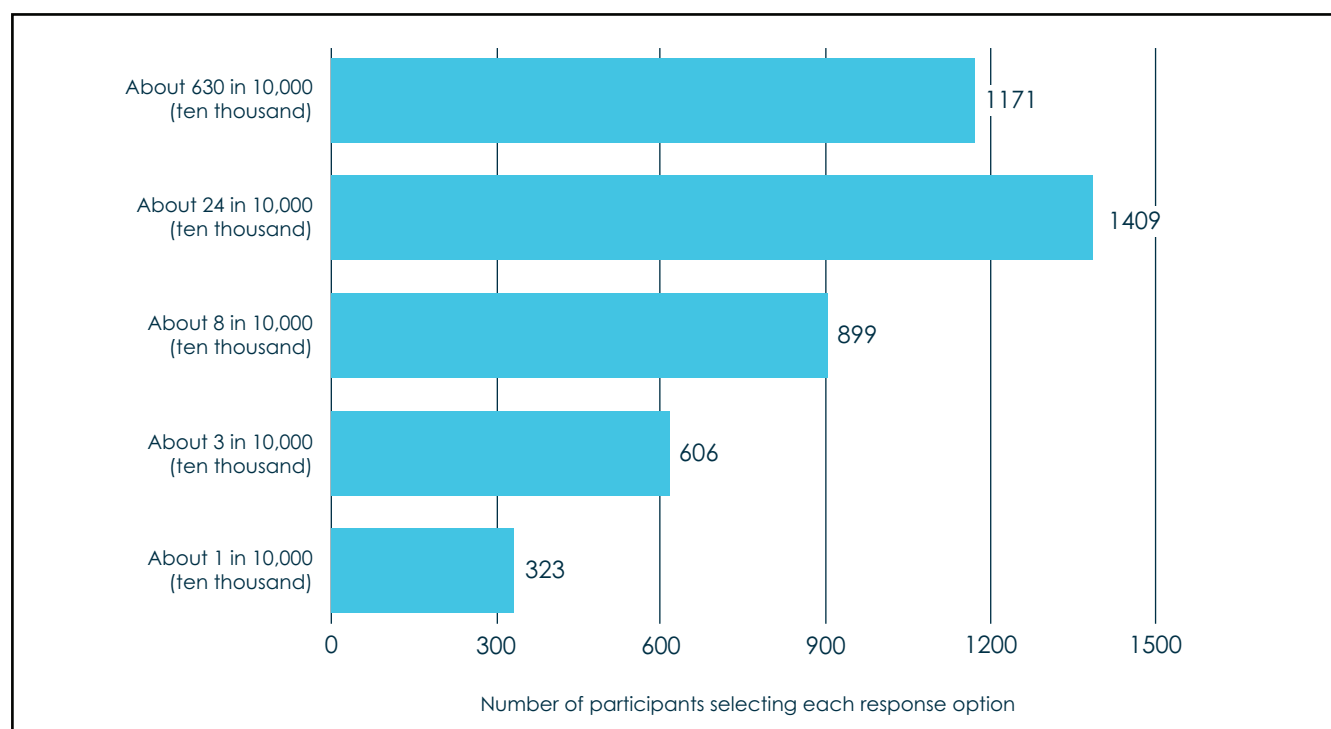
First, we asked participants "What is your best guess for how many sheep, on average, die on a typical 17-day live export voyage to the Middle East?" Five options were provided: 1, 3, 8, 24, and 630 in 10,000 animals (the correct answer is 23 in 10,000 animals based on Australian government data<sup>5</sup>). As shown in Figure 9, the most common response to this item was the correct answer with 32% of the sample choosing 24 in 10,000.

Second, we presented participants with the following factual statement and asked them to indicate the extent to which this was higher or lower than they expected: "According to the Australian Government Department of Agriculture, 23 in every 10,000 (ten thousand) sheep and 11 in every 10,000 (ten thousand) cattle transported overseas in 2020 died while in transit."

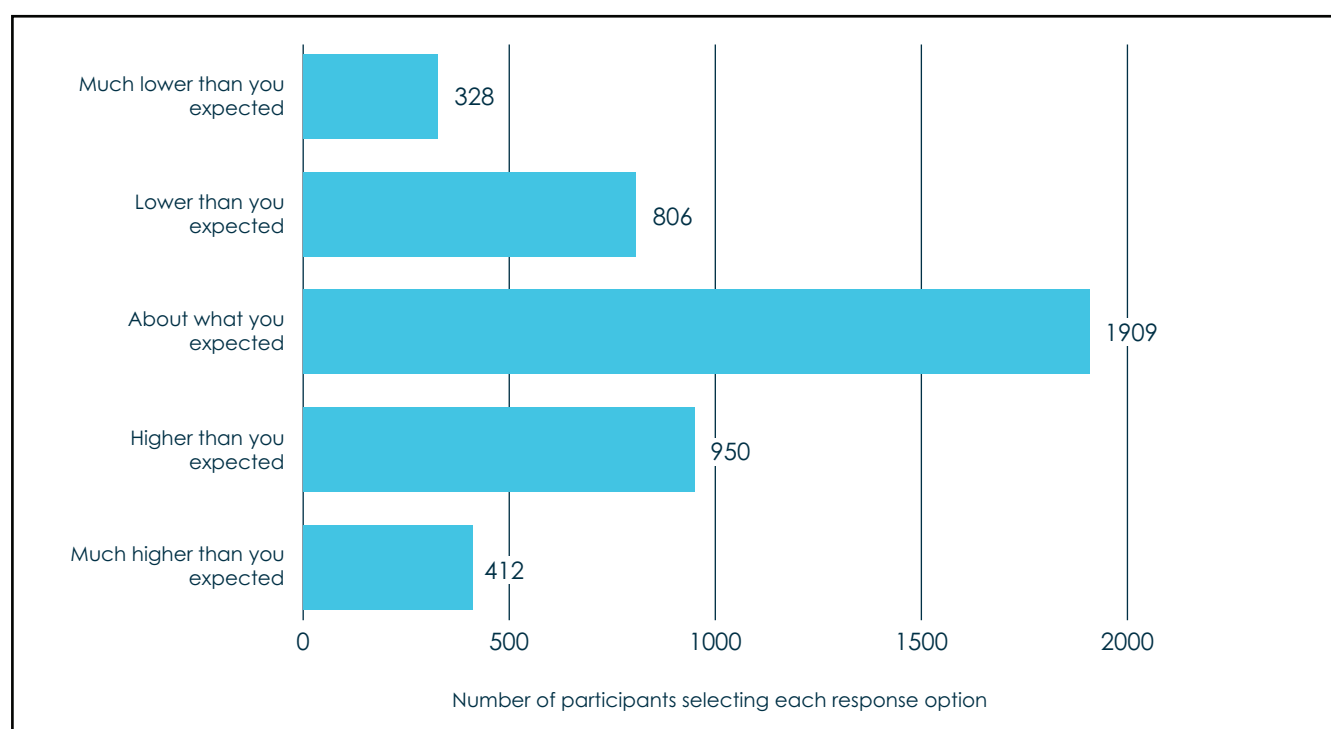
As shown in Figure 10, the largest response group was "About what you expected" with 43%. 31% of participants felt this was higher than they expected while 26% of the sample felt that this was lower than they expected. Together then, 74% of the sample felt that the actual mortality rates for sheep and cattle were at or lower than their expectations.

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<sup>5</sup> <https://www.awe.gov.au/biosecurity-trade/export/controlled-goods/live-animals/live-animal-export-statistics/reports-to-parliament>



**Figure 9. Number of responses for each mortality estimate option, 2021**



**Figure 10. Extent to which actual mortality rate matched expectation, 2021**



Third, we included three items to explore the nuance in this question of animal mortality. When asked to rate their level of agreement with the statement “The average number of live export deaths is acceptable to me”, 46% of participants disagreed or strongly disagreed, 27% were neutral and 27% agreed or strongly agreed. Similarly, 44% 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 29% disagreeing and 27% neutral.

Finally, 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”. 43% of participants indicated agreement, but a greater proportion indicated a neutral response on this question than in the items above (38%), and 19% disagreed.

## KEY INSIGHTS

New items designed to tease apart community concerns regarding the voyage component of the live export supply chain showed that even though the actual mortality rates of sheep and cattle are at or below expectations for animal deaths on sea voyages, slightly fewer than a third of respondents felt this was acceptable.

Importantly, we also found that twice the number of participants were more concerned about significant mortality events on single voyages than they are about the average mortality rate across a year. This provides strong guidance to the industry regarding the specific location and nature of community concern regarding voyages.



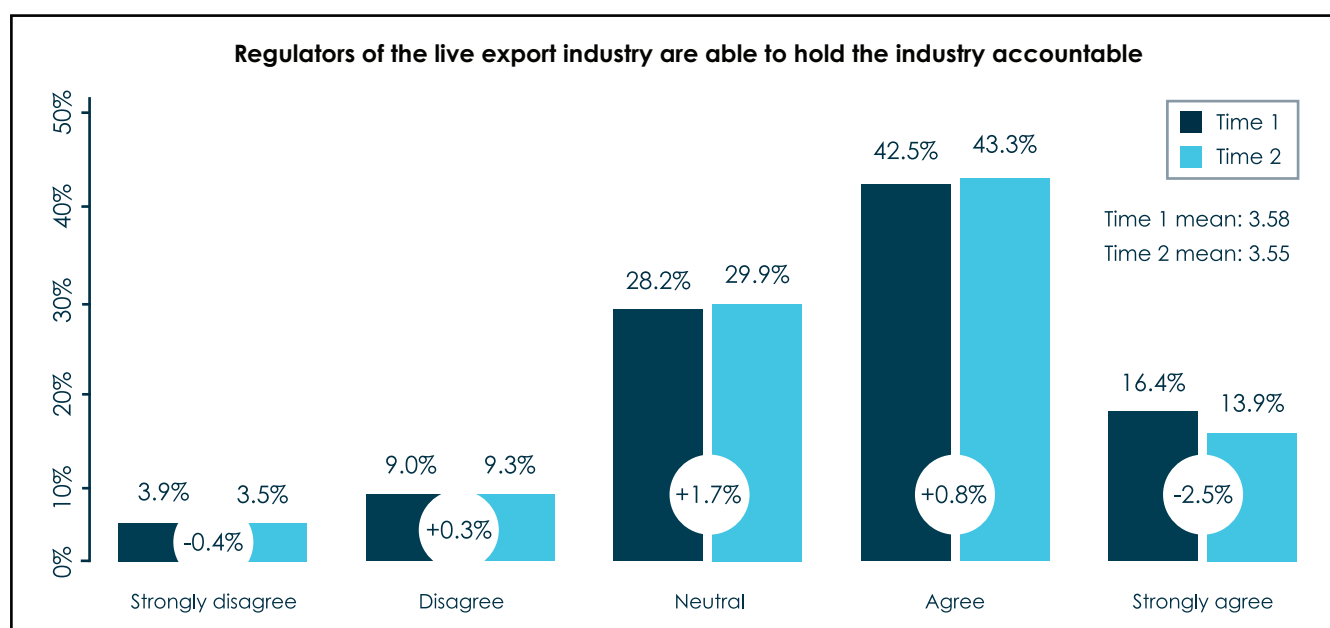
# CONFIDENCE IN THE GOVERNANCE WITHIN AND AROUND THE LIVE EXPORT INDUSTRY

**The rules that govern an industry are important for public confidence that community expectations will be met in the course of its activities; particularly an industry that manages sensitive issues such as animal welfare. For community members, these mechanisms provide assurance that standards are being applied and met, and that consequences for poor management are real and disincentivising. When effective, these mechanisms protect the public interest and can lead to higher levels of community trust. It can also rebalance the location of these mechanisms from external regulation to the internal application and monitoring of industry standards.**

We asked participants to indicate their confidence that "Standards for the live export industry ensure people in the industry do the right thing". 60% of community members agreed or strongly agreed

with this statement, consistent with the 2019 data (62%). 27% indicated they were neutral on this measure (24% in 2019) and 13% disagreed (14% in 2019). The importance of these standards and their enforcement by industry was clear in this data, with 83% in agreement that this is important, very similar to the baseline results.

When participants were asked to rate the extent to which "Regulators of the live export industry are able to hold the industry accountable", 57% of participants agreed or strongly agreed this was the case, 30% were neutral and 13% disagreed. These results were again very similar to the 2019 national survey data. Results were also very similar when we asked participants the extent to which "The federal government is able to hold the industry accountable", with 58% of participants in agreement, 29% neutral and 14% disagreeing.



**Figure 11. Distribution of responses for confidence in regulation items 2019-2021**



## GOVERNANCE MATTERS IN AUSTRALIA AND OVERSEAS

Comments suggest that issues related to governance are important in the evaluation of treatment of animals. Several comments indicated confidence in or concern that regulators were doing their job in ensuring high standards were enforced effectively:

“I hope the checks and balance for this industry are monitored and updated regularly.”

“It’s all regulated by government bodies.”

**But more often, comments related to concern or uncertainty that standards were applied effectively in foreign destinations or while animals were in transit:**

“Poor government regulations in countries regarding treatment of animals and livestock at their destination.”

“...what matters most is that the animals 'in transit' are not & ought not to be ill treated by all concerned middlemen & that they are exported as safely & as easily as possible - as per the LAWS governing them!!!”

“Once they leave Australia it is hard to police the entire trip, I know that a lot of slaughter houses are cruel to the beasts and should be addressed by the government there.”

(my concern is) “Processing overseas as it may not have a governed standard of respectful slaughter.”

### KEY INSIGHTS

Australians have confidence in the power and capability of the government and regulators to hold the live export industry accountable, and that the standards applied within the industry ensure it does the right thing.





## DIFFERENCES BETWEEN KEY DEMOGRAPHIC GROUPS

**In this national survey of community attitudes toward the live export industry, we asked participants to tell us a bit about themselves so that we could compare responses from different groups. These demographic characteristics included gender, age, highest level of education attained, the state they lived in, and how many people they knew that worked in the livestock industry.**

Examining key measures from the survey instrument, we then compared responses between these groups to identify where these differences were statistically significant. The largest differences were observed among four key demographic characteristics, illustrated in Figure 12.

Starting with geography, we found that ratings of trust and acceptance differed depending on where people said they lived. Counter to expectations, we found ratings of trust in and acceptance of the live export industry to be higher in metropolitan areas than among people describing their location as regional (farming or non-farming).

However, much stronger differences were found when comparing participants that reported knowing someone that works in the livestock industry to those that do not. If participants knew at least one person that worked in the livestock industry, their ratings of trust and acceptance of the live export industry were higher than those who knew none. Ratings were much higher again for those that knew at least six people in the livestock industry.

Looking at differences by state, we can see that trust and acceptance were highest in the Australian Capital Territory and lowest in Tasmania. Ratings among residents of the other five states and the Northern Territory were all around the midpoint of the scale used.

Finally, looking at differences by age, we see an interesting pattern in the data with trust and acceptance highest among those Australians 35-44 years and lowest among those 55-64 years. For all other age categories, responses on both measures were around the midpoint of the scale.

### KEY INSIGHTS

Patterns of responding by demographic category reveal yet more complexity and nuance in sentiment toward the live export industry. Results here may be seen to challenge assumptions about the views of people in cities versus those that live regionally, for example, and reveal the much greater influence that personal connection makes to attitudes about the industry.

These data show large differences between the views of Tasmanians (much more negative) and those in the ACT (much more positive) relative to people in the other states and the Northern Territory. And that there is no linear relationship between age and trust in or acceptance of the live export industry.

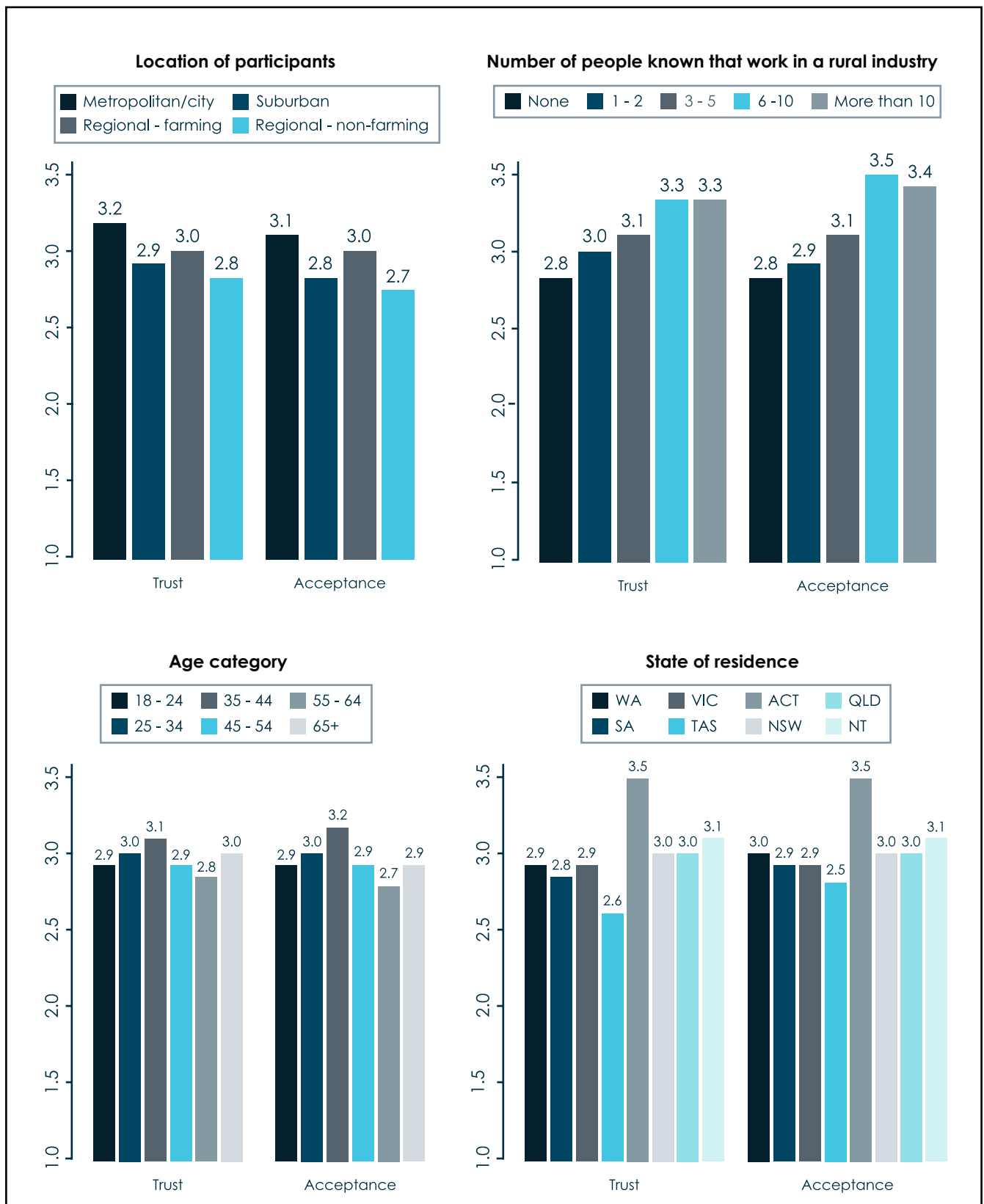


Figure 12. Differences by demographic characteristics 2021



# PATHWAYS TO COMMUNITY ACCEPTANCE FOR THE LIVE EXPORT INDUSTRY IN AUSTRALIA

In the baseline national survey in 2019, we examined the pathways to community acceptance for the live export industry using a statistical method called Path Analysis. This technique allowed us to identify the key drivers of acceptance in the industry 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 may focus its efforts to increase acceptance. We conducted the same analysis on the 2021 data, allowing us to examine whether the new items included in this iteration of the survey add value to this recipe.

## THE PATHWAYS TO ACCEPTANCE

In 2021 we found similar drivers were important in predicting acceptance as in 2019, although the new measures included in this second survey provided additional nuance for the live export industry relationship with community members (see Figure 13).

Looking first at the overall structure of the model, 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 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.

The next feature of this model to note is that there are two additional pathways to acceptance: via judgements of the acceptability of average animal mortality on voyages and an assessment of the costs and benefits of the industry overall. These pathways will be examined later in this section.

### Drivers of trust

#### 1. Industry responsiveness

The strongest driver of trust was the extent to which the industry listens to, and takes action based on, the concerns of community members. The more the community feel heard, respected and that the industry is responsive, the more that community members trust the industry. This driver represents the biggest change in the modelling from the 2019 data, where responsiveness was not found to be a strong driver of trust in the model.

#### 2. Meeting animal welfare standards

As we may expect, animal welfare features prominently in the 2021 model as it did in 2019. However, in 2021 the items that formed this scale relate exclusively to the extent that treatment of animals in the live export supply chain is in line with Australian welfare standards. The more that community members feel these standards are being met, the more they trust the industry to act responsibly.

### 3. Importance to overseas markets

Given the purpose of the live export industry is to supply people in overseas destinations with livestock for meat processing or breeding, it is instructive that the benefits of the industry for citizens of other countries should feature prominently in this path model. The more that the industry is seen to positively contribute to nutrition, diet diversity, freshness and safety of available protein in foreign markets, and to the quality of breeding stock in those places, the more the industry is trusted by Australians.

### 4. Regulation

Finally, the greater the level of confidence that Australians have in both the internal and external mechanisms of governance ensuring the industry operates appropriately, the more that Australian community members trust the industry to act responsibly. As discussed earlier, this may be seen to be a precursor for greater levels of trust: confidence in the regulation, standards and the application of consequences for breaches of these rules, leads to greater faith that the industry will act responsibly.

#### Additional drivers of acceptance

Two additional drivers of acceptance were observed in the 2021 path model.

#### 1. Acceptability of average mortality rates

New in the 2021 survey was a series of items that sought to tease apart one particular component of the live export supply chain that creates concern for many Australians: the voyage from Australia to overseas markets. We found acceptance of current voyage mortality rates was a strong, direct driver of acceptance of the industry; almost as strong as trust. The more acceptable community members feel this mortality rate is, the more they accept the industry.

Importantly, the modelling also shows us that acceptability of current mortality rates is influenced by how much community members trust the industry.

As trust in the industry to act responsibly increases, so does perceived acceptability of this mortality rate. We also found that industry responsiveness and welfare standards influenced this assessment of acceptability, although less strongly than trust.

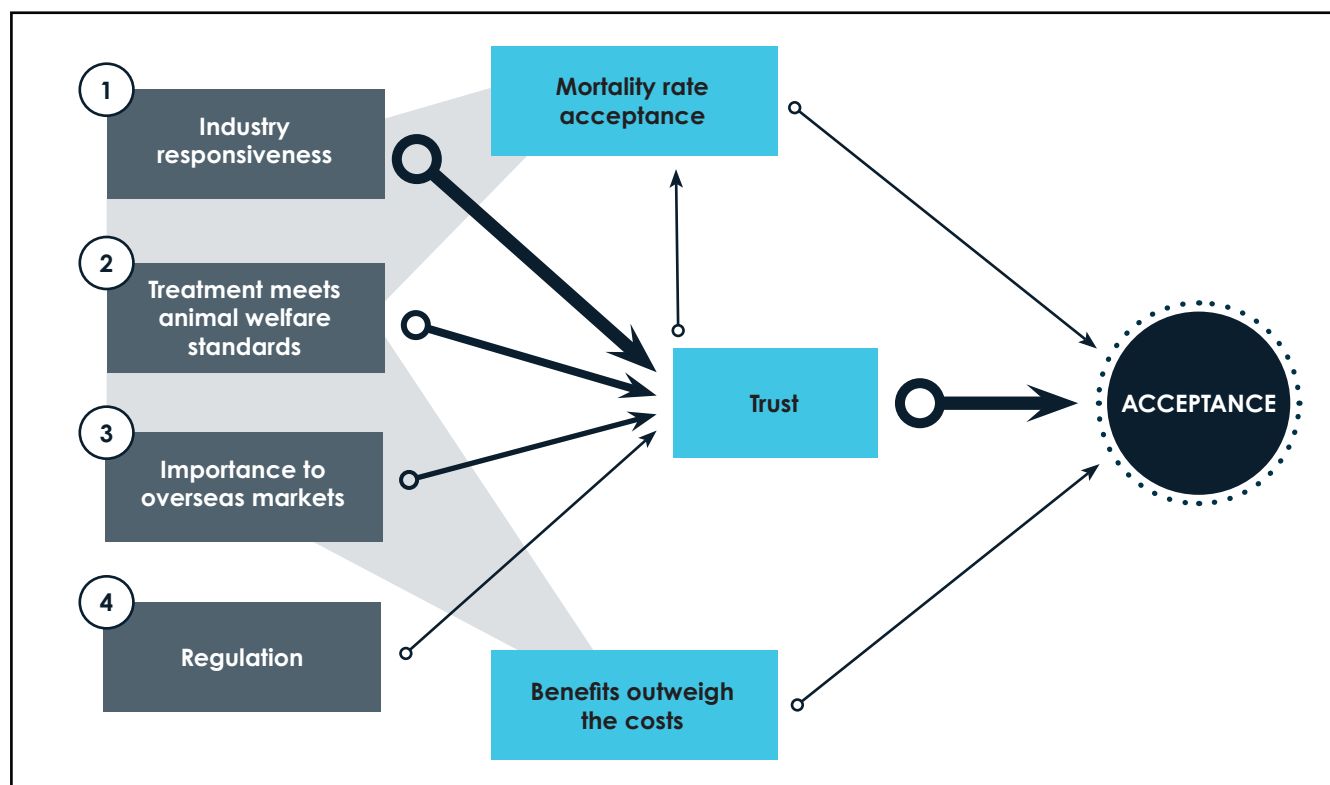
Together, these relationships show us that when community members feel the industry is listening to their concerns, taking action based on them (especially in the context of welfare standards) and can be trusted to act responsibly in the way it manages its operations, mortality rates are viewed as being much more acceptable. Put another way, it seems that mortality rates are viewed as an acceptable consequence within an industry seen to be operating appropriately.

#### 2. Benefits outweigh costs

Acceptance was also higher among those community members for whom the benefits of the industry were seen to outweigh the apparent costs of the industry. Informing this judgement were industry responsiveness and the extent to which treatment of animals within the supply chain is seen to be in line with Australian welfare standards. This feature of the model tells us two main pieces of information about the relationship between Australians and the live export industry.

The first is that for most Australians the live export industry is viewed with greater nuance than the public discourse around the industry would suggest: Australians are making complex, multi-factor judgements about the industry, even on the issue of animal welfare. Second, the role of industry responsiveness in this relationship shows that discourse about the conditions for industry acceptability is live and ongoing to the extent that industry is seen to be actively listening and responding to community concerns. The implications of these two insights are important: the live export industry is able to inform and influence the acceptance of its operations, and how these conditions evolve, through its own intent and behaviour.





**Figure 13. A stylised diagram of the live export industry Trust Model 2021**

### A LITTLE MORE ABOUT PATH ANALYSIS

With a path model like that in Figure 13, 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 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 thing (e.g. the two different questions used to measure industry responsiveness) we combine them to form a scale, averaging responses on this set of questions to form a single score. It is these scales that 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 13. 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. The calculations behind a path analysis may be complicated, but its effect should be to illustrate clearly and concisely what is most important in the relationship between an industry and the community in which it operates, and on which 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 width of the arrows reflects their relative importance in driving the measure they are pointing at; for example, industry responsiveness is a stronger driver of trust than confidence in regulation. 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 Australian live export industry operates in a complex social and political context. The industry generates significant economic value for the country, along with employment and opportunities for livestock farmers and many others throughout its supply chain. It also provides benefits for those in overseas destinations that can access safe, fresh meat because the industry operates. However, it must manage significant community concern about the way animals are treated on the journey from paddock to market.**

This program of research seeks to tease apart these complexities and provide the live export industry with a constructive, productive understanding of community sentiment, and how this sentiment changes over time.

Following a baseline national survey in 2019, this most recent national survey allows us to see how attitudes within the community have changed over the last two years. We also provide an update and expansion of the path model articulating the 'recipe' for community acceptance of the live export industry.

Overall, community sentiment toward the industry has improved modestly yet consistently. General concern about the way animals are treated has eased since 2019, and ratings of the industry's management of animal welfare have improved modestly. Concern about welfare remains high, reinforcing that this is the critical issue for the industry.

We also see that community members increasingly understand and agree that welfare is a complex issue that involves more than just the absence of harm to animals. Looking at the comments made by participants in this most recent survey, there is a great deal of uncertainty about the way live exports are managed and the extent to which these complex issues are handled once animals leave Australia. Assisting community members to understand more

clearly how the industry currently operates may not just address that uncertainty but help shape community expectations with greater reference to current activity rather than in a comparative knowledge vacuum.

Two new features within the 2021 national survey allowed us to explore the complexity of the live export industry in more detail. Using a visual representation of the live export supply chain, the voyage from Australia to destination markets was seen as the most concerning component within a stylised visual representation of the journey. The survey then revealed that, while the low average mortality rates for sheep and cattle on these voyages were not unexpected, they were still of concern. Specifically, the risk of a significant mortality event is of greater concern to community members, on average, than a low overall average mortality rate. It is also relevant to note that only half of participants in this survey felt strongly enough about their concerns within the live export supply chain to click on the diagram.

This is important to tease apart empirically. It demonstrates to industry that mitigating the risk of large mortality events is central to managing the area of greatest concern to Australians (i.e. the sea voyage from Australia to destination markets).

Path modelling of the 2021 data reveals why this is so important. Industry responsiveness, the treatment of animals, and confidence in the regulation were three of the four main drivers of trust in the live export industry. Put another way: listening and responding to community concerns, to ensure animals on these voyages are treated in line with regulated Australian standards, leads to higher levels of community trust in and acceptance of the live export industry.

The level of trust in the industry also informs the extent to which Australians feel the rate of mortality

on these voyages is acceptable. Consequently, where the mortality rate is then seen to be the best possible outcome for animals, in a context of industry excellence and regulatory oversight, there are higher levels of community acceptance of the industry.

The other main driver of trust in the 2021 model was the importance of the industry to people in overseas destinations. The more that community members understand the nutritional contribution of Australian animals to people in these locations, the more Australians trust and accept the live export industry. Since 2019, community sentiment toward these benefits has improved significantly.

In addition, a large proportion of Australians view the export of technology and know-how by the live export industry as improving the welfare standards and outcomes in destination markets. Similarly, the export of breeding stock to secure better food security outcomes for destination countries was an important component in the value proposition for the live export industry among Australians. Despite ratings of this value increasing significantly since the baseline survey, Australians were clear in their view that there is no room for compromise on lowering of welfare standards for religious or cultural reasons.

The value of the industry for Australia and livestock farmers also strengthened over the last two years. On average, about three quarters of participants endorsed the industry as an important part of the economy in farming communities that produce animals for export and for the Australian economy, and as an important part of the agriculture sector. The number of people that indicated the live export industry bothers them declined appreciably, and the proportion of Australians that believe the positives of the industry outweigh the negatives is now greater than the proportion that do not.

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*The story of live export in Australia is complex. While concerns remain high around the welfare and treatment of animals, the value of the industry to a diverse set of stakeholders here and overseas has increased in the eyes of the Australian public. There are opportunities for the live export industry to help the public, stakeholders, and critics to understand more clearly how it works within a strongly regulated operating environment to ensure the treatment of animals is in line with community expectations.*

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