

COMMUNITY TRUST IN AUSTRALIA'S RURAL INDUSTRIES

Year 2 national survey
2021



CITATION

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VOCONIQ, OUR STORY

Voconiq is an Australian data science company developed from a program of research conducted and commercialised by its founders within Australia's national science agency, CSIRO. The Voconiq founding team spent over a decade developing and publishing this science, engaging over 70,000 community members in 14 countries to understand what leads to deeper trust between companies, industries, and governments, and the communities they work within and 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. We achieve impact by helping those that work within and alongside communities to listen to community voices effectively.

To learn more, go to www.voconiq.com



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OVERVIEW OF FINDINGS

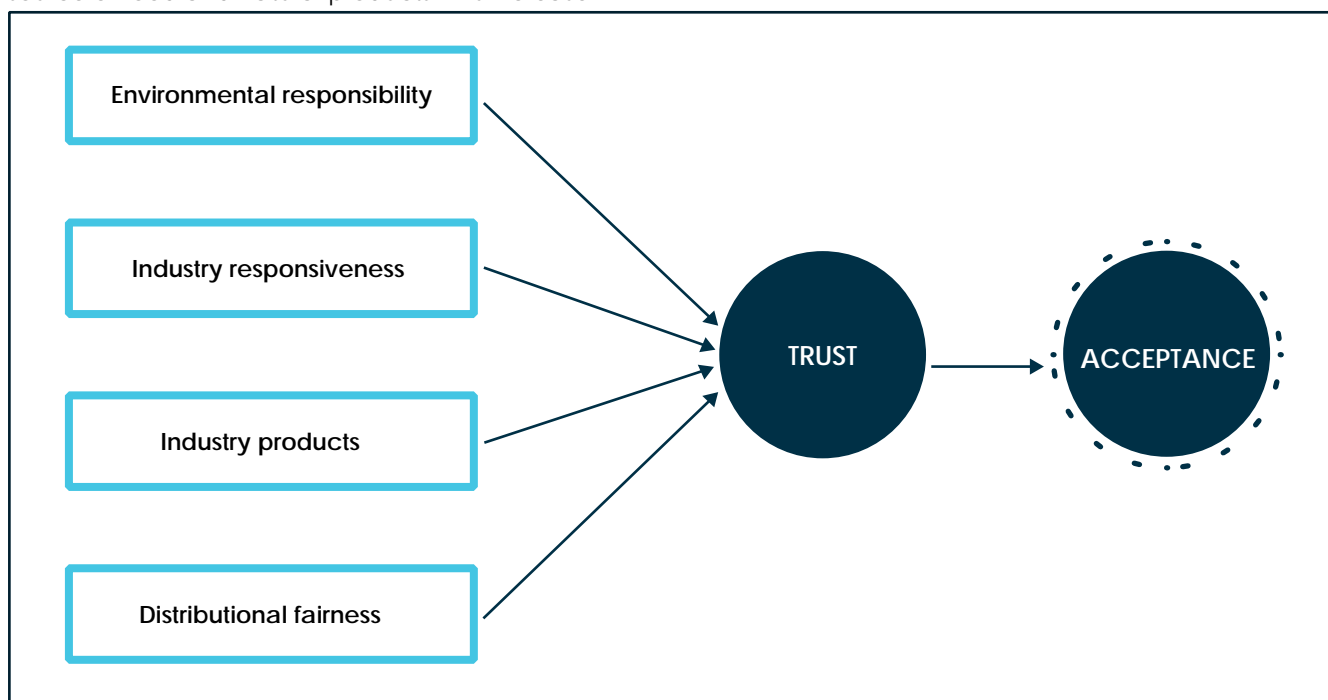
Year 2 of the Community Trust in Rural Industries program of work has delivered deeper insights into the drivers of community trust and acceptance for Australia's farmers, fishers, and foresters. Building on the Year 1 research, 5,358 Australians completed a comprehensive survey of their attitudes toward rural industries in Year 2, allowing for comparisons across time. Together with additional data collected during May 2020 to assess the effects of the COVID-19 pandemic on community trust in rural industries, 14,225 Australians have participated in this program of work to date. Year 2 of the work program has been focused on supporting action within rural industries based on the research.

TRUST AND ACCEPTANCE HAVE IMPROVED

Trust in and acceptance of Australia's rural industries increased between Year 1 and Year 2, confirming the relationship with the Australian community remains strong. The COVID-19 pandemic appears to have increased community focus on and confidence in the work of rural industries in ensuring a safe and reliable source of food and natural products. This increase in

community expectations that environmental management is a shared responsibility among all rural industries. Industry performance in managing its environmental impacts and demonstrating sound environmental stewardship remained the strongest driver of community trust in rural industries.

ACTION IS THE CURRENCY OF TRUST



trust and acceptance can in part be attributed to more positive community perceptions that Australia's rural industries manage their environmental impacts effectively, and are "responsible stewards of the land and sea". Increased support for and positive sentiment toward rural industries has not led to a greater willingness to compromise environmental responsibility for economic sustainability however, or shifted

New measures included in the Year 2 research revealed that taking action based on community concerns is fundamental to building trust with Australians. Acknowledging mistakes and actively responding, rather than remaining silent on challenging issues, received strong endorsement from community members. Contributing to the improvement in trust and acceptance, community

members indicated stronger agreement in Year 2 that Australia's rural industries listen to and respect community opinions and are more responsive to community concerns. Industry responsiveness via listening and responding to community concerns remained a strong driver of trust in the Year 2 research.

AUSTRALIANS' CONNECTION TO THE LAND RUNS DEEP

In the Year 2 research a key driver of trust in rural industries (importance of rural industry products) was examined in more detail. This work showed that it is the role of rural industry products in helping Australians feel connected to farmers, fishers, and foresters that YEAR 2 NATIONAL SURVEY

has real power in this relationship. In addition, the more that community members felt a connection to

influential than a personal connection to these industries.

A FAIR GO FOR REGIONAL COMMUNITIES

Year 2 also revealed a new important driver of trust in Australia's rural industries: distributional fairness. Australians feel strongly that regional communities are important to the country, and that they should receive a fair share of the benefits produced by its rural industries.

As this unique collaborative program of work progresses, rural industries are gaining access to a deeper, clearer understanding of what leads to community trust in them. This work is showing that acting on issues that matter to Australians is not only in line with community expectations for how rural industries should operate but is also the primary pathway to growing community trust in

INTRODUCTION

the land and the people that work it, the greater their level of trust in rural industries. There is a power in the products of rural industries that exceeds its material value; this data shows that a transactional exchange can lead to a relational outcome. In addition, knowing someone that works in a rural industry was much more strongly associated with more positive views about rural industries than where community members live. The 'city-country divide' is much less

and acceptance of these same industries.

The Community Trust in Rural Industries project is an Australian-first – a concerted, sectorwide focus on how Australia's rural industries can understand, reflect on, and then take action to build a stronger, deeper



COMMUNITY TRUST IN AUSTRALIA'S RURAL INDUSTRIES
relationship with the Australian community.

This threeyear program of research is ambitious and challenging considering the diversity of issues that are relevant in this relationship across Australia's many rural industries.

In 2020, this program of work began with a broadbased engagement of stakeholders in and alongside these industries, including from among more critical perspectives. This engagement informed the design of a national survey, the results of which were published in March 2020. Little did anyone know how tumultuous 2020 would be, and the important role that Australia's rural industries would play in supporting Australians and the Australian economy through a most challenging year.

The timing of the Year 1 national survey provides us with an excellent benchmark of community attitudes toward Australia's rural industries immediately prior to the onset of the COVID-19 pandemic. In that

opening series of research activities, we revealed what community members think about rural industries and why they think this way; we provided a comprehensive baseline of community attitudes and experiences across a broad range of issues and which of these attitudes and experiences are most important in driving trust and acceptance of rural industries.

This foundational work set the scene for significant rural industry outreach to producers and other rural industry participants, research and development corporations and agencies, government agencies and departments, animal welfare bodies, and industry representative bodies. In total, the research was communicated directly to more than 300 individuals in more than 50 video calls and webinars, supporting meaningful dialogue and discussion about the nature of community trust, tangible action that may be taken to strengthen it, and 'where to from here' conversations. Many more community members and people working in and alongside Australia's rural industries engaged with content and material created to deliver the key research messages.

WHERE TO FROM HERE?

Data insights are not action, however, and the last 12 months have been an exercise in reflection by Australia's rural industries on how best to move forward with an agenda of renewal and investment in strengthening in their relationships with the Australian community. Through that broad communication and discussion of the Year 1 research findings, the Year 2 research agenda took shape.

The Year 2 research agenda repeated and expanded upon the key themes from Year 1 to support action by Australia's rural industries. Specifically, we worked to dig deeper into the main drivers of trust in rural industries and areas or issues that were identified as key community concerns in 2020.

In addition, the Year 2 national survey explored in more detail the nature of community uncertainty about key aspects of rural industry practices. In Year 1, we showed that the areas of greatest community uncertainty were also the strongest drivers of trust in rural industries (i.e. environmental responsibility and industry responsiveness). Helping rural industries, and Australians more generally, more clearly understand the opportunity and risk this uncertainty represents was a key goal for the Year 2 research.

Primarily, this expansion of the Year 1 survey research was designed to support rural industries in taking action to improve community trust.

THE RESEARCH PROCESS

As in Year 1, an online survey methodology was used to access the views of Australians over the age of 18 years. Using an online research panel to ensure a broadly representative sample of Australians by age and gender, data collection was completed between 29th September and 23rd October 2020. Of the 5,958 surveys that were completed, 5,358 were included for analysis after data cleaning¹.

THE CONTENT OF THE YEAR 2 SURVEY

In Year 2, we revised the survey instrument to focus on those topics and issues that were of greatest importance and interest in Year 1. We also included new measures to provide more detail around differences in responses by geographic location and level of uncertainty about how rural industries operate, for example. We again included a comprehensive set of demographic questions, as well as more explicit measures allowing more geographic analysis of responses. The broad categories of issues we examined in the Year 2 survey were:

CONTEXTUAL QUESTIONS

- Importance of rural industries in Australian life and nutrition,

- Self-rated knowledge about rural industries (new measure),

- The importance of regional communities for Australia,
- Personal connection to rural industries.

KEY FOCAL ISSUES FOR RURAL INDUSTRIES

- Environmental impacts and management (including new measures),
- Animal welfare,
- The importance of rural industry products (including new measures),
- Health and safety of workers in rural industries,
- Climate change and variability,
- Food safety and biosecurity,
- Questions that asked participants explicitly how much they know about how specific issues are managed within rural industries (e.g. water allocation for different uses; new measures).

GOVERNANCE CONTEXT FOR RURAL INDUSTRIES

- Government regulation of industry practices and industry-led best management practice schemes (including new measures).

FAIRNESS AND RESPONSIVENESS

- Industry responsiveness to community concerns (including new measures),
- Distributional fairness of industry benefits,

OUTCOME MEASURES

- Trust in rural industries (expanded list from Year 1)
- Acceptance of rural industries.

¹ '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).

In a separate but related activity, Voconiq collected additional 'Pulse' data in May 2020 to assess any changes that the pandemic was having on a range of aspects relating to the relationship Australians have with rural industries. We analysed 2,085 surveys from that 'pulse' survey, collected between the 8th and 20th May 2020. These data will also be reported where appropriate in this report.

WHO COMPLETED THE NATIONAL SURVEY?

5,358

PEOPLE PARTICIPATED IN
THE YEAR 2 SURVEY

14,225

PEOPLE HAVE TAKEN PART
IN THE PROGRAM SO FAR

2,085

PEOPLE PARTICIPATED IN THE MAY 2020 PULSE SURVEY

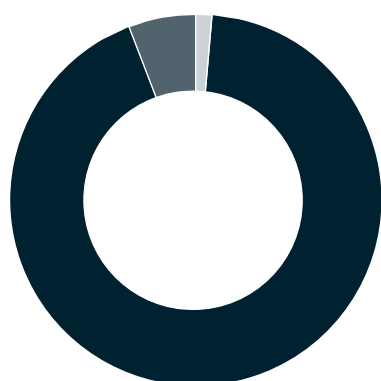
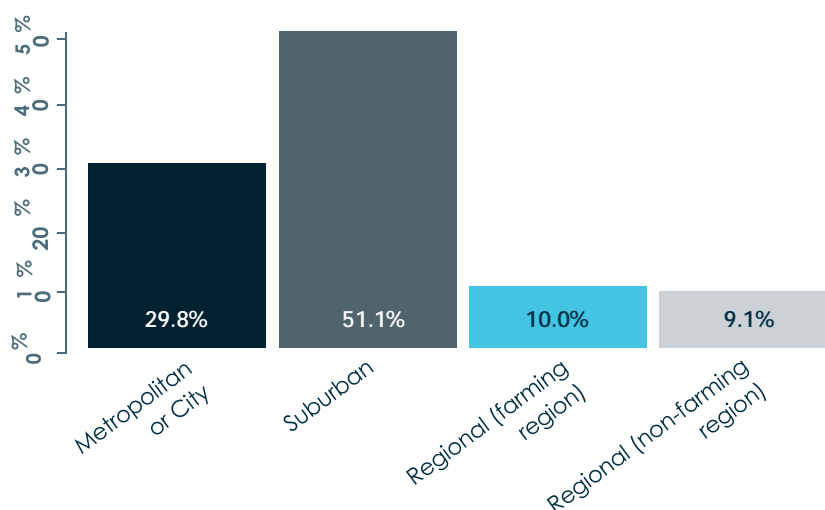
AVERAGE AGE



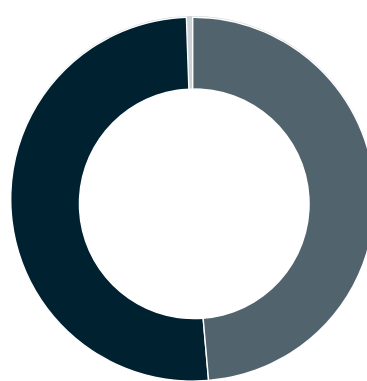
46.19

YEARS OLD

REGION OF RESIDENCE



■ No: 91.01%
■ Yes: 5.88%
■ Prefer not to say: 1.11%



■ Female: 50.9%
■ Male: 48.7%
■ Other: 0.4%







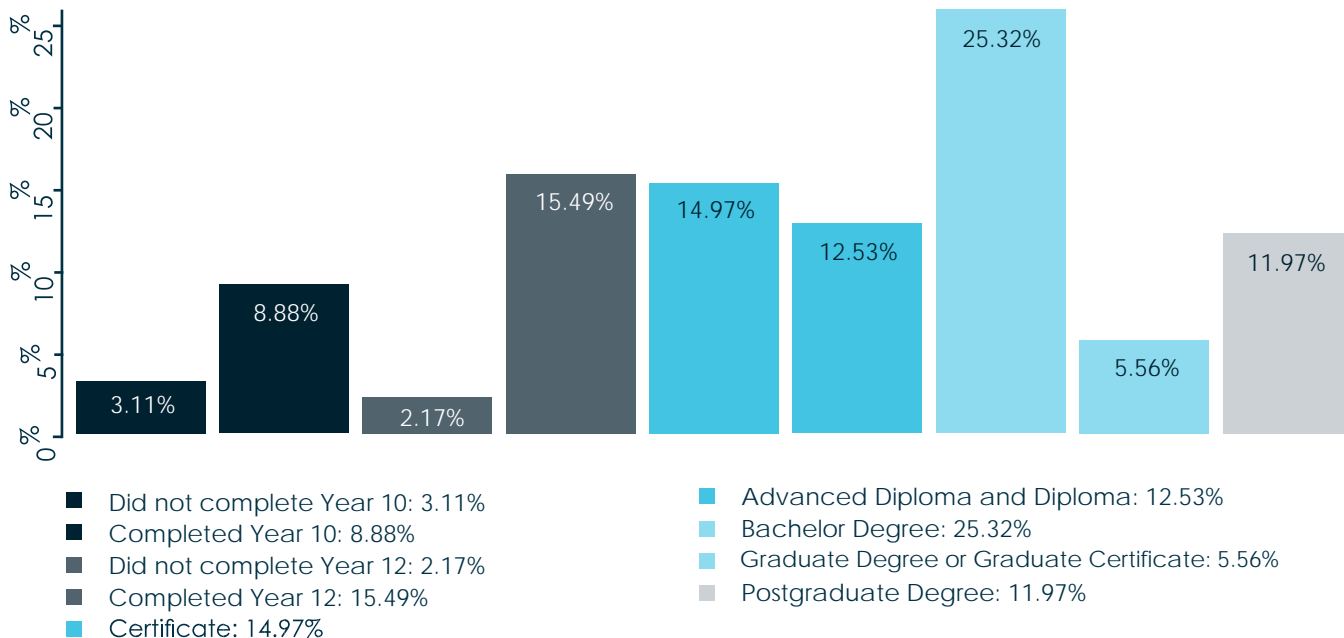
26.5%



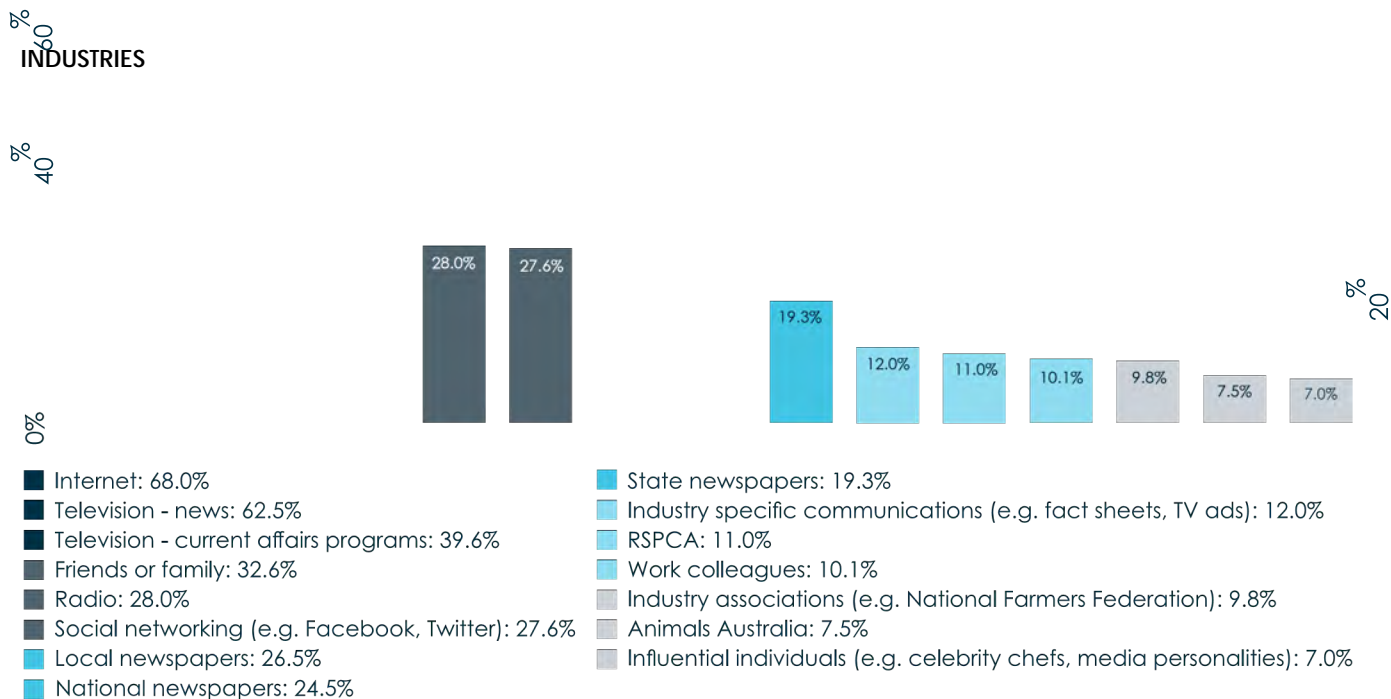




EDUCATION LEVEL



PLEASE HELP US UNDERSTAND WHERE YOU GET MOST OF YOUR INFORMATION ABOUT AUSTRALIAN RURAL



THE RELATIONSHIP REMAINS STRONG

Our starting point is to evaluate change over time on key measures reflecting the health of the relationship between the Australian community and its rural industries. We examined rural industries in the broader national context through its economic contribution to the country, the role of farmers, fishers and foresters in Australian society, and the value community members place on the products of these industries. We also asked community members about their level of trust and acceptance of rural industries and their members, and how well they respond to community concerns.

RURAL INDUSTRIES REMAIN CENTRAL TO AUSTRALIA'S STORY

Over the last 12 months, the importance of rural industries to Australians remained high, with 86% of community members indicating agreement that rural industries are important to our way of life in this country (see Figure 1). Similar results, consistent across Year 1 and Year 2 data, were observed around the importance of rural industries to regional communities and to Australian society, in general.

When these questions were framed in a way that allowed community members to connect their ratings more directly to the role of farmers, fishers, and foresters in society, responses remained strongly positive. Small increases in sentiment toward foresters and fishers were observed relative to Year 1, and a small drop in sentiment for farmers (albeit off a very high baseline).

In this Year 2 national survey, we also wanted to explore

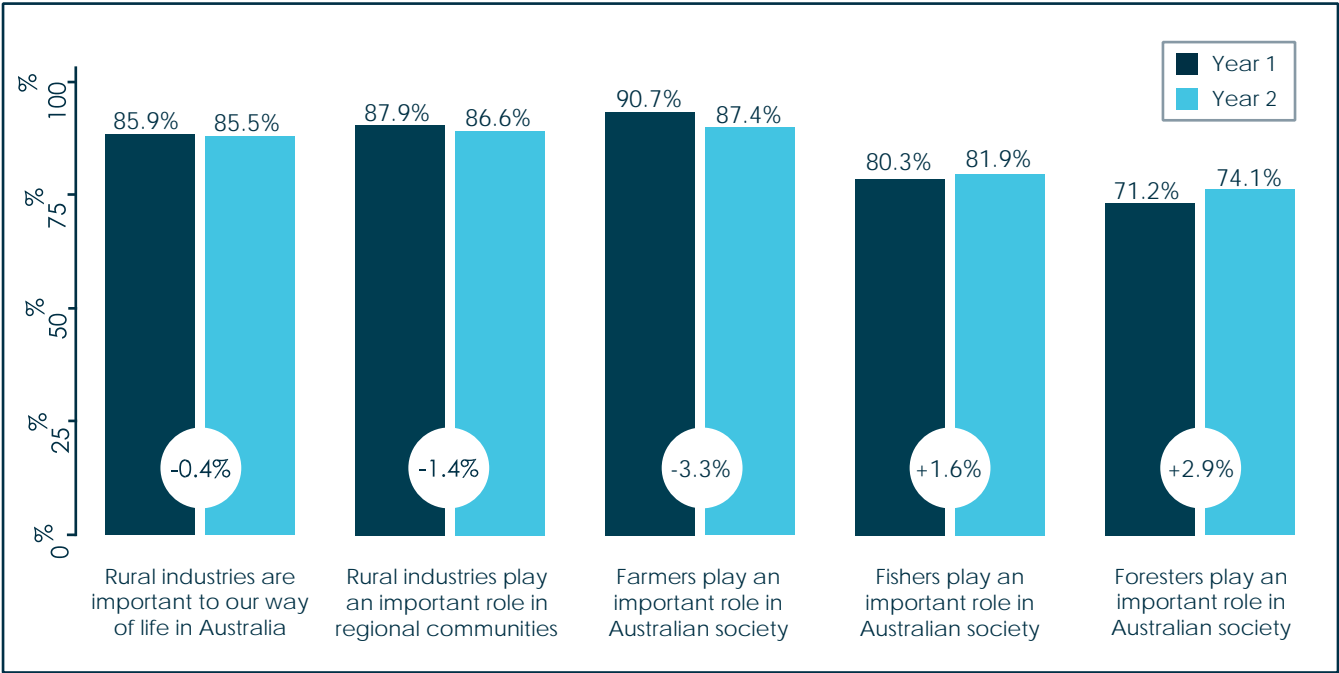


Figure 1: Importance of rural industries to Australians (percentage of participants rating agree or strongly agree to each statement with percentage change Year 2 versus Year 1)

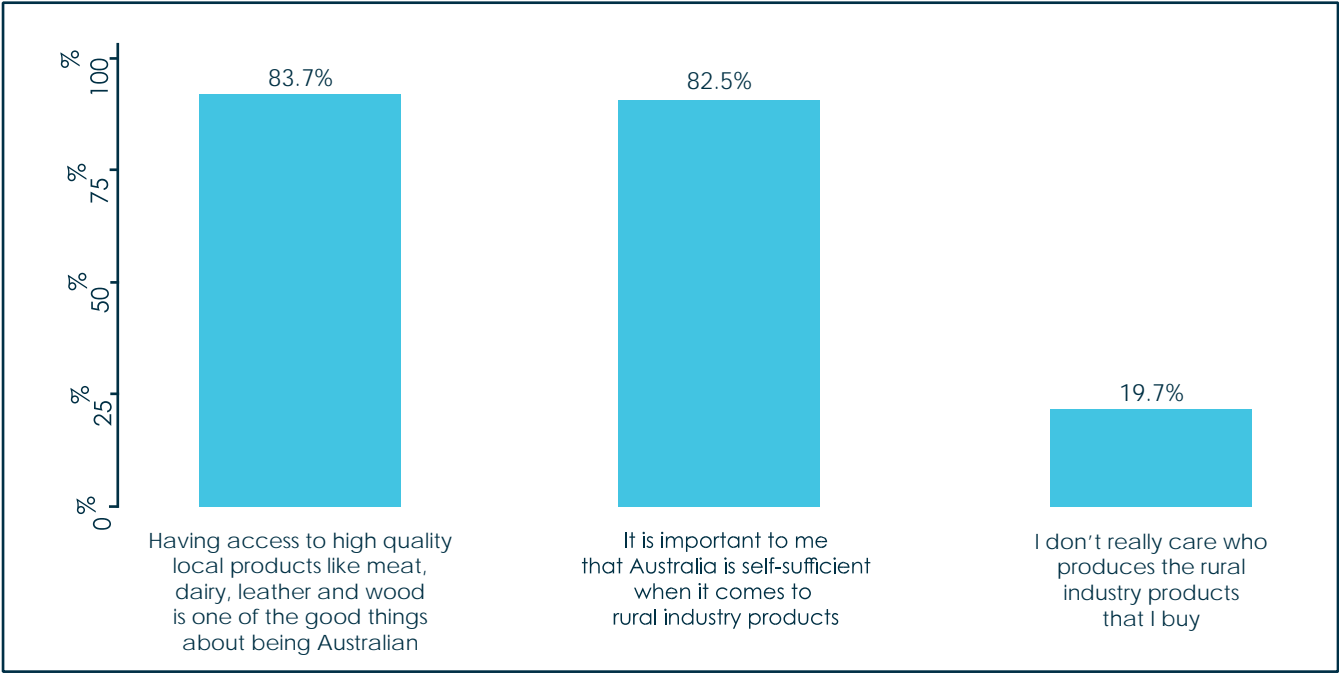


Figure 2: Qualities that make rural industry products important to Australians (percentage rating agree or strongly agree with each statement; new items for Year 2)

in more detail the value that Australians place on rural industry products. It was a key driver of trust in rural industries in Year 1 and we included additional measures to tease this apart in Year 2. First, there was

strong agreement that buying Australian rural industry products helps community members to feel connected to the farmers, fishers and foresters who produced them, and that “having access to high quality local

products like meat, dairy, leather, and wood is one of the good things about being Australian" (see Figure 2).

It may not be surprising given the year that we have experienced in Australia that 82.5% of Australians surveyed agreed strongly or very strongly that it is important that Australia is self-sufficient when it comes to rural industry products. Just 19.7% of participants indicated agreement that they "didn't really care" who produces the rural industry products that they buy. And while 76.0% of participants indicated strong or very strong agreement that "rural industry products from Australia tend to be higher quality than those from overseas", there was also modest levels of support for the sentiment that "not all rural industry products we use need to come from Australia" (i.e. 38% agreed strongly or very strongly).

TRUST AND ACCEPTANCE OF RURAL INDUSTRIES

As in the Year 1 study, we asked participants to rate their level of trust in and acceptance of Australia's rural industries. Community trust remained strong (see Figure 3), with 89% of community members indicating at least moderate levels of trust in Year 2 relative to 87% in Year 1 (mean Year 1 = 3.42, Year 2 = 3.45 on a scale from 1, *not at all*, to 5, *extremely*). Trust in major farming groups like the National Farmer's Federation remained steady at 3.40. Trust in government showed the strongest improvement across time, with trust in state governments (from 2.70 to 3.00) and the federal government to act responsibly (2.60 to 2.90) improving from Year 1. These trust scores are still at or just below the mid-point of the scale used, however. Trust in large food retailers such as Coles, Woolworths and Aldi also improved over the previous 12 months, from 2.70 to 2.90, perhaps reflecting the important role they have played during the pandemic.

Also, of note in this data is that the proportion of Australians indicating lower levels of trust decreased. For rural industries in general, and for state and federal governments and large retailers, increases in average trust ratings were the result of movement from lower levels of trust to higher levels of trust rather than a shift from lower levels of trust to neutral scores.

Acceptance of Australia's rural industries, a key outcome measure in this work, improved significantly from Year 1. The proportion of community members indicating they "accept rural industries" either very *much* or *extremely* increased by 15% from 56.1% in Year 1 to 71.3% in Year 2 (see Figure 4), with the average score improving from 3.60 to 3.94. The proportion of community members that "reject" rural industries remained small and steady at 11%.

RESPONSIVENESS OF AUSTRALIA'S RURAL INDUSTRIES

A key driver of community trust and acceptance in Year 1 of the research - industry responsiveness to community concerns - also improved in Year 2. The proportion of Australians that agreed or strongly agreed that rural industries listen to and respect community opinions increased by 2.6% in Year 2 to 52.6%, while the proportion of Australians agreeing that rural industries are prepared to change their behaviour based on community concerns increased by 5%, to 49.3%. There was also a corresponding drop in the proportion of Australians indicating that "some rural industries in Australia do not seem interested in community concerns", from 50.30% agreeing in Year 1 down to 45.60% in Year 2 (-4.7%).

In Year 2, we also wanted to explore in more detail what types of activities community members think makes an industry responsive. We did this by asking

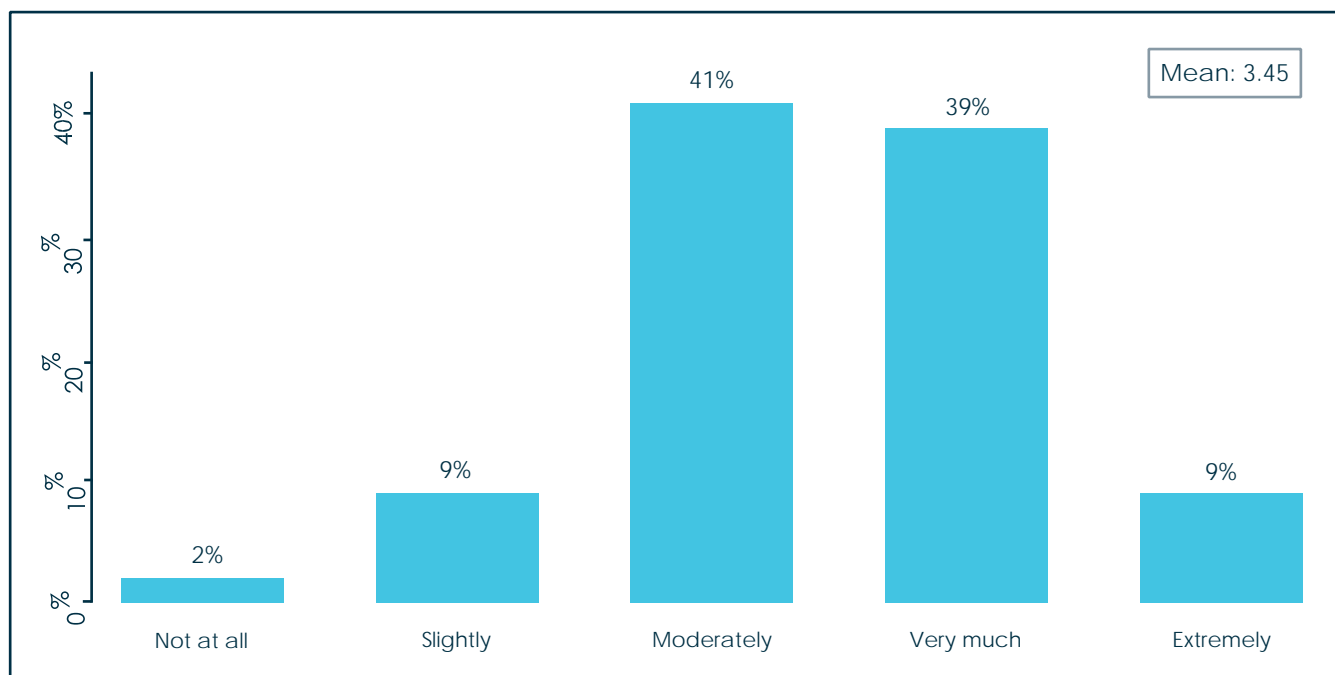


Figure 3: Mean score and distribution of ratings for trust in Australian rural industries to act responsibly

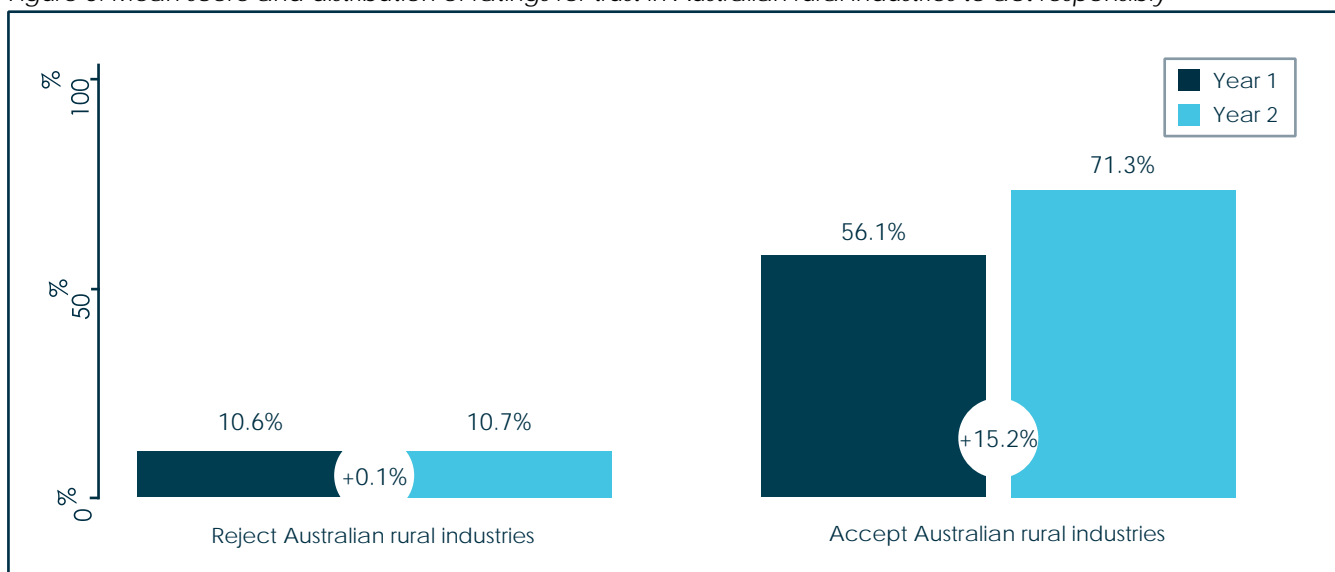


Figure 4. Ratings of rejection and acceptance of rural industries (percentage of participants rating agree or strongly agree with each statement with percentage change between Year 1 and Year 2)

'if-then' type questions, asking community members to rate their level of agreement with a series of statements describing potential industry actions in response to community concern. We asked, for example, "when rural industries acknowledge their mistake after public outcry, I can forgive the mistake". 53.8% of participants agreed or strongly agreed with this statement, with similar levels of agreement that advertisements showing

rural industries responding to community concerns "make me feel like I can trust them to act in my best interests". Responsive action is clearly important to community members, with much lower levels of agreement with statements suggesting silence from a rural industry on an important issue means they are either unaware of the issue or there is no problem (24.9% and 26.1% agreement, respectively).

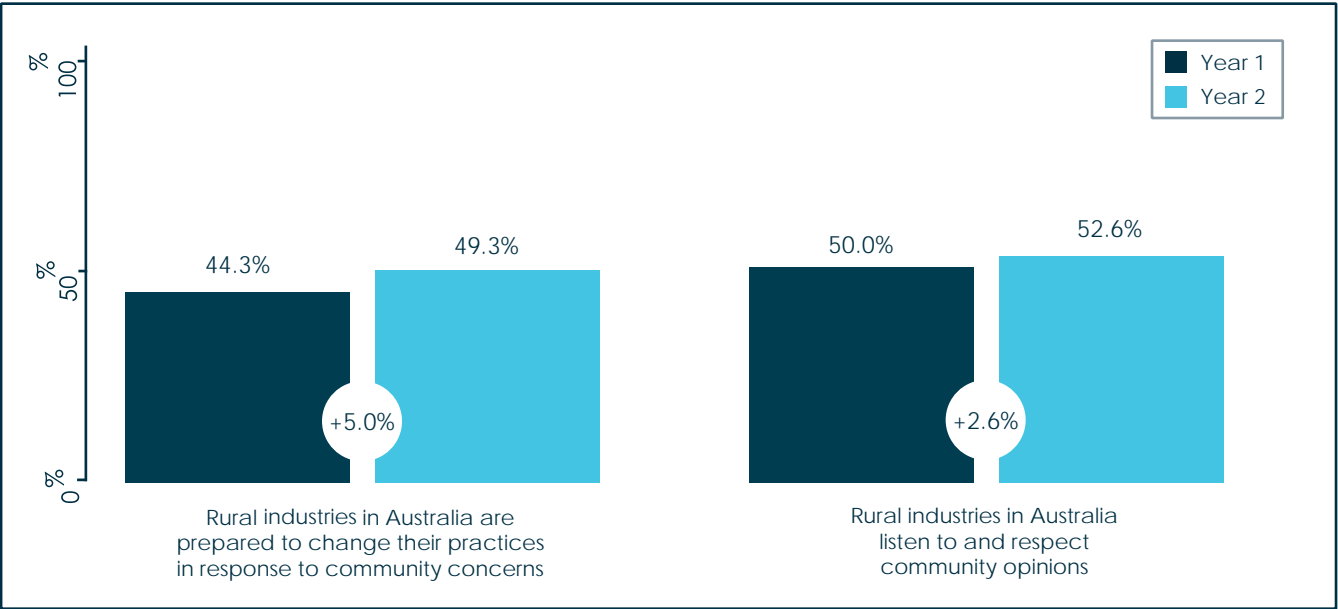


Figure 5: Ratings of rural industry responsiveness (percentage of participants rating agree or strongly agree with each statement with percentage change between Year 1 and Year 2)

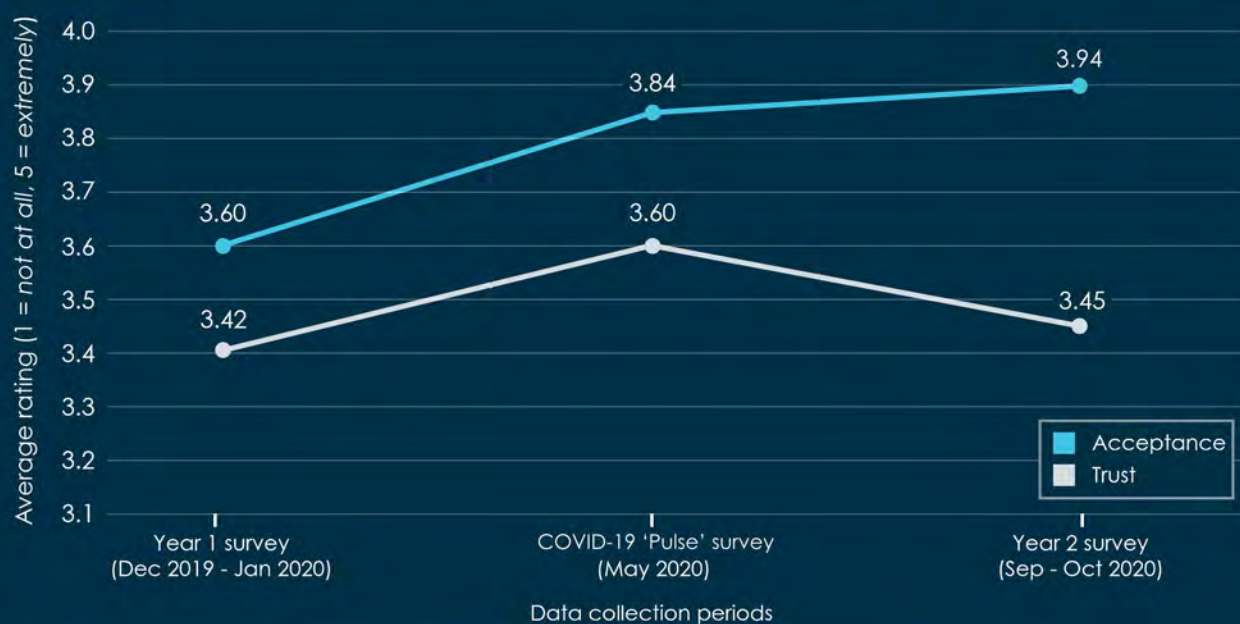


Figure 6: Ratings of trust in and acceptance of rural industries before and during COVID-19 pandemic

PANDEMIC EFFECTS

During the early months of the COVID-19 pandemic, anecdotal reports of changing consumer preferences regarding rural industry products (e.g. increased use of individual packaging for fresh fruit and vegetables) and public discourse regarding the role of rural industries in maintaining domestic access to essential goods led us to explore in general how community views of rural industries may have been affected. Looking at overall ratings of trust and acceptance, community sentiment improved significantly on both measures between the Year 1 survey and the COVID-19 Pulse survey. However, while acceptance increased again in the Year 2 survey, ratings of trust dropped back towards Year 1 levels (see Figure 6).

To understand why, we examined how ratings of the main drivers of trust and acceptance also changed in the Pulse data compared to the Year 1 data. And while we found some important changes that will be explored in later breakout sections, there was no 'smoking gun' that neatly explained the improvement and then drop in trust or, more to the point, why this differed from the continued improvement in acceptance. It is important to note that the strength of the relationship between trust and acceptance was very similar in Year 2 as it was in Year 1, indicating that there are other issues outside of those we are currently measuring that are influencing acceptance.

IMPORTANT ISSUES FOR AUSTRALIA'S RURAL INDUSTRIES

How Australia's rural industries interact with the land and the sea is fundamental to the way community members view them, based on the data from Year 1 of this program of research. We revisited these same topics in Year 2, expanding the measures included to explore in more detail this important driver of trust and acceptance in Australia's rural industries.

WATER, THE ENVIRONMENT AND CLIMATE VARIABILITY

Australians were more positive in Year 2 than they were in Year 1 that Australia's "farmers, fishers and foresters are responsible stewards of the land and the sea", with the proportion of participants in agreement with this statement increasing from 50.4% to 61.3% (+4.9%). There was no change in sentiment towards the effectiveness of farmers, fishers and foresters in managing their environmental impacts however, with the proportion of participants in agreement with this statement steady at around 50%.

Again in Year 2, community members strongly endorsed the idea that environmental management is a shared responsibility across all rural industries, although the proportion of Australians agreeing with this sentiment dropped (from a very high baseline) from 85.3% to 78.7%. A strong positive increase in community

sentiment (+5.8%) that Australia's oceans are sustainably managed was recorded, with agreement increasing from 35.9% in Year 1 to 41.7% in Year 2.

New measures included in Year 2 allow us to examine the role that community members see for themselves in this issue, with 62.4% of participants agreeing that they have a role to play in managing the environmental impact of rural industries, and 52.2% agreeing that "I am willing to shift my consumption to more expensive products if they are more sustainably produced". In addition, 82.6% of Australians surveyed agreed that they would support additional government funding going to "support rural industry efforts to become more sustainable".

Around 50% of Australians surveyed agreed that rural industries use water responsibly, with no real change recorded between Year 1 and Year 2 on this measure. However, there was a 6% increase in agreement that the "way water is allocated in Australia for different uses is appropriate" (from 27.7% agreement in Year 1 to 33.7% agreement in Year 2). We also observed a modest increase in agreement (2.7%) that Australian rural industries use more water than they are entitled to (27.8% agreement in Year 2).

Context matters, however, and climate change-induced drought was an area we explored in more detail in this Year 2 survey. 78.1% of Australians surveyed indicated strong or very strong agreement that they are worried about drought as an issue in Australia, and 74.1% likewise agreed that "during times of drought, we should prioritise allocating sufficient water to rural industries so they can survive until drought breaks". A strong caveat to this sentiment was also recorded, with 51.2% of participants agreeing that water should only be used in agriculture industries after making sure the environment has enough. In a new

measure for Year 2, 75.5% of community members also agreed or strongly agreed that they were concerned about the level of foreign ownership of land and water in Australia.

Finally, we examined self-rated knowledge about how water is allocated in Australia, with 58.6% of participants agreeing that they “really don’t know a lot about how water is allocated within and between rural industries

and whether it’s fair”. Given the complexity of water allocation mechanisms, often across state boundaries, this is not surprising. However, environmental responsibility is a key concern for Australians and consideration for how to help community members engage more actively with the principles that underpin water allocation in Australia would benefit a broader conversation about rural industries in the context of community trust.

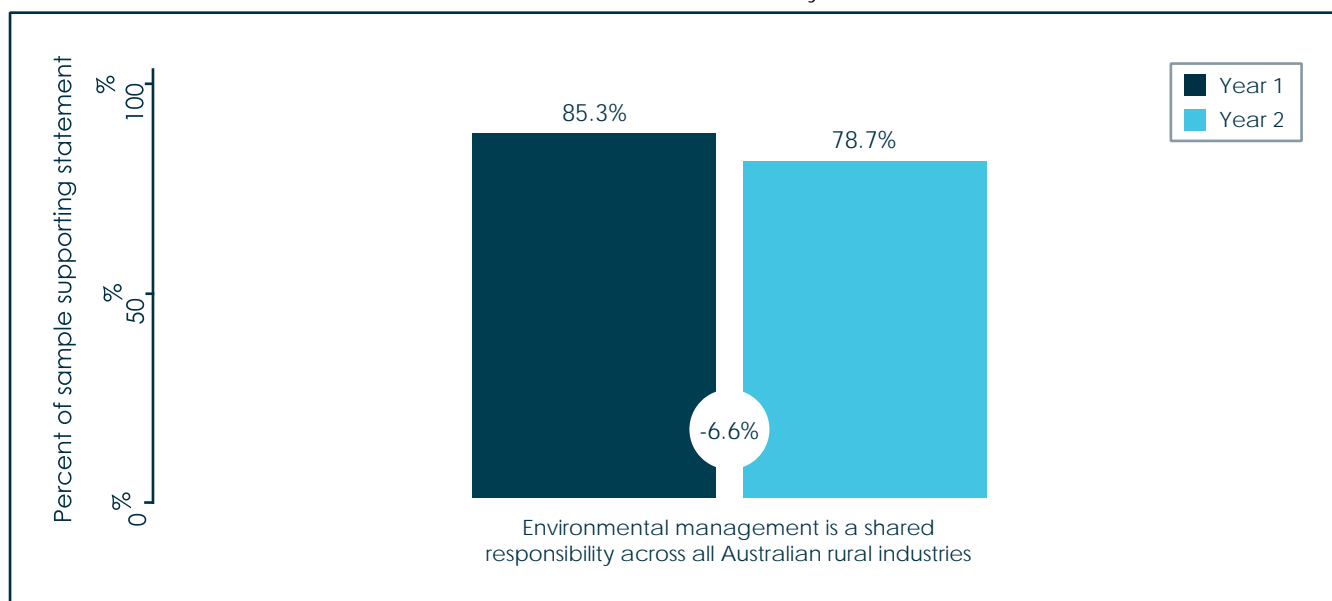


Figure 7: Ratings of shared responsibility for environmental management (percentage of participants rating agree or strongly agree with percentage change between Year 1 and Year 2)

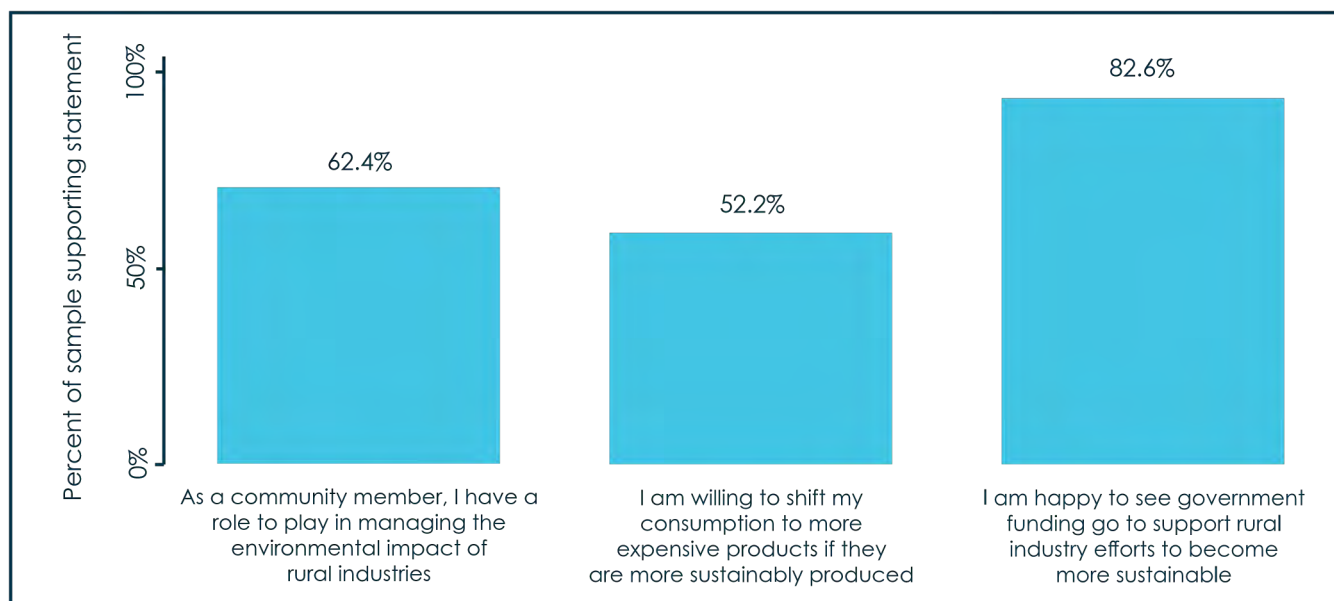


Figure 8: Pathways to sustainability (percentage of participants rating agree or strongly agree with each statement; new items for Year 2)

PANDEMIC EFFECTS

Data collected in a 'Pulse' survey during the height of the COVID-19 pandemic impacts showed that community confidence in Australia's rural industries to supply fresh food during the pandemic and that this could be done without compromising public safety was extremely high (85% and 84% agreement, respectively). 88% of community members also agreed that "having a safe, reliable supply of fresh food is comforting during the COVID-19 pandemic". 79% of community members surveyed also indicated agreement that the pandemic had made them more aware of the importance of food

security for Australia.

JOBS, DOLLARS AND REGIONAL COMMUNITIES

Australians maintained their strong belief that rural industries play an important economic role through the export of products overseas (agreement was steady at around 74%) and through creating significant employment in regional areas (79.7% agreed in Year 2, down from 81.6% in Year 1; see Figure 9). Australians also remain strongly of the view that "regional communities are important to Australia" (86.8%), and that strong regional communities are important for producing safe, high-quality food and fibre products in this country (83.3% agreement).

In Year 1 we examined community perceptions of working conditions in Australia's rural industries, discovering that there is some concern about worker exploitation and safety. In Year 2, these views did not change with about half of the sample agreeing that exploitation of workers is a serious problem, and only 34% agreed that workers in Australian rural industries are

paid a fair wage for their work. Using a new measure included in Year 2, we found that more than half of Australians surveyed (52.6%) felt they "don't know how well farm labourers are treated in Australia". This level of uncertainty was recorded at a time when there have been well documented COVID-19 related difficulties in accessing farm labour during critical parts of the year for picking fruit and vegetables.

An easing of sentiment related to collective responsibility for issues within rural industries more generally was recorded, with 66.5% of community members agreeing that "environmental management is a shared responsibility across all Australian rural industries" in Year 2, down from 71.4% in Year 1 (-4.9%). This is still a very large majority of Australians surveyed, however.

ANIMAL WELFARE, AGRICULTURAL TECHNOLOGY AND FOOD SAFETY

Australians, in general, feel strongly that animal welfare is a fundamental consideration for all industries that involve animals. For Australia's rural industries, this represents both an area of risk when community

expectations are not met, and an area where responsive approaches have value in the relationship rural industries have with community members.

In general, responses to animal welfare questions eased in their intensity since Year 1. Australians strongly believe that rural industries have an obligation to ensure a high level of welfare for animals in their care and control, that animal welfare is not just about an absence of harm to them, and importantly, that animal welfare in rural industries is a complex issue. Yet on each of these measures the proportion of Australians surveyed that agreed strongly or very strongly with these sentiments decreased modestly (see Figure 10). Speaking to the realities of meat production in particular in Australia through a new measure for Year 2, 62.4% of participants agreed strongly or very strongly that “Australian farmers treat animals for slaughter with dignity and respect”, which may go some way to explaining modestly reduced concern about animal welfare within rural industries.

Australians strongly believe that food produced in Australia adheres to strict food safety standards, although the proportion of participants indicating strong or very strong agreement with this sentiment reduced from 83.9% in Year 1 to 77.7% in Year 2. Alongside this, we observed a modest increase in community concern with the use of weed control chemicals and support for Australian farmers seeking other ways to control weeds and increase crop yields than through the use of chemicals (see Figure 11).

Australians were concerned about the use of technologies such as genetic modification to increase the productivity of rural industries (52% indicated concern), and 65% of Australians felt farmers should find better ways to increase crop yields and control pests than using chemicals (65% agreement). Reflecting the complexity of these issues, however, community members also acknowledged that currently the use of fertilisers and chemicals by rural industries is necessary.

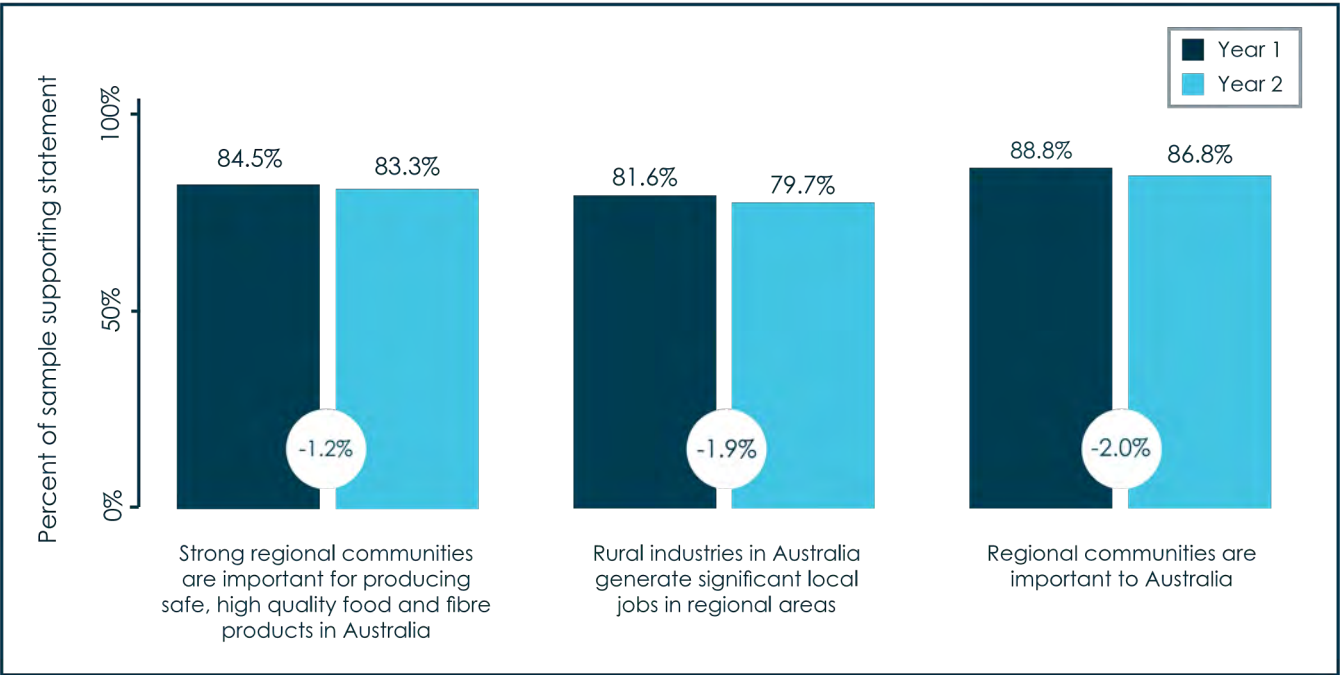


Figure 9: Importance of rural industries for regional communities (percentage of participants rating agree or strongly agree with percentage change between Year 1 and Year 2)

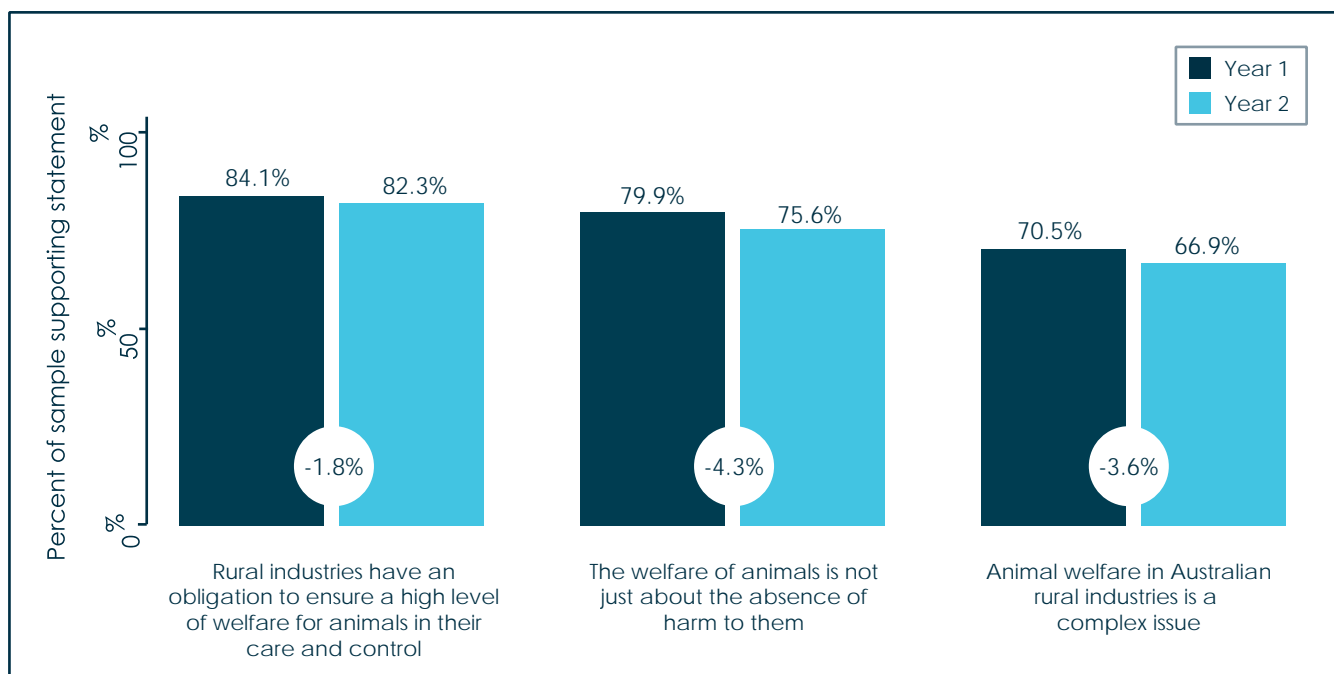


Figure 10: Importance of animal welfare (percentage of participants rating agree or strongly agree with percentage change between Year 1 and Year 2)

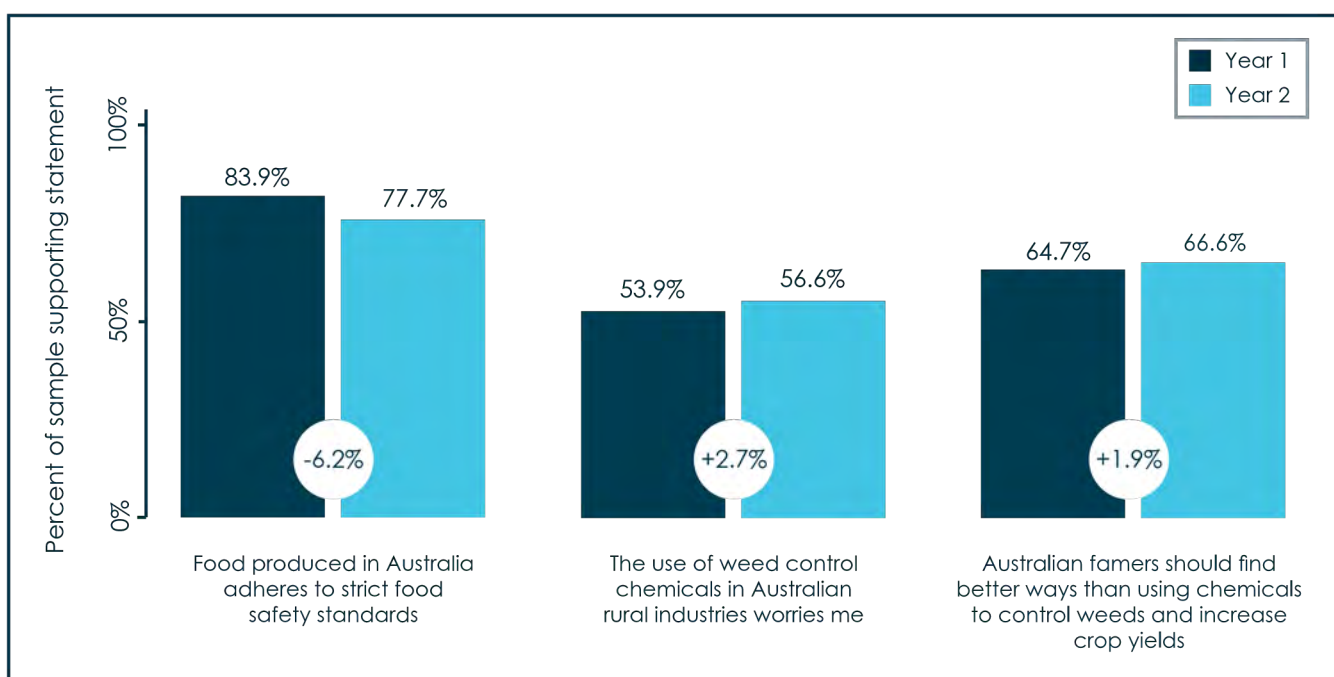


Figure 11: Food safety and chemical use in rural industries (percentage of participants rating agree or strongly agree with percentage change between Year 1 and Year 2)

ACCOUNTABILITY AND SHARING BENEFITS

Meeting community expectations is fundamental to the trust relationship between Australia's rural industries and the Australian community. Two important elements that help us to understand more about how rural industries are performing in this space are community perceptions of the mechanisms of accountability that hold industries to a standard (internal and external), and how fairly community members feel the benefits generated by rural industries are distributed.

There were strong levels of agreement (63.2%) that "farmers, fishers and foresters in Australia are committed to working in a sustainable way" and also very strong agreement (82.4%) that "it is important that standards within Australian rural industries are

enforced effectively". Looking at external mechanisms of accountability, there is an increasingly positive sentiment that "state and federal governments are able to hold rural industries accountable (from 49.4% agreement in Year 1 to 54.0% in Year 2), and a modest reduction in agreement that "penalties for misusing natural resources in rural industries are not strong enough" (from 52.6% of participants in Year 1 agreeing with this statement to 50.0% in Year 2).

Examining distributional fairness results from Year 2 showed that community members were steady in their view that Australia (54.9%) and regional communities (46.7%) receive a "fair share of the benefits from rural industries in Australia" (see Figure 12). Given the increased importance in Year 2 of distributional fairness as a driver of community trust, this represents an area of opportunity for rural industries. Together, these results show that internal industry standards are important to Australians, including through rural industries holding their members to account. They also show that rural industries have some room to improve in terms of demonstrating how their work benefits all Australians, beyond the quality of their products.

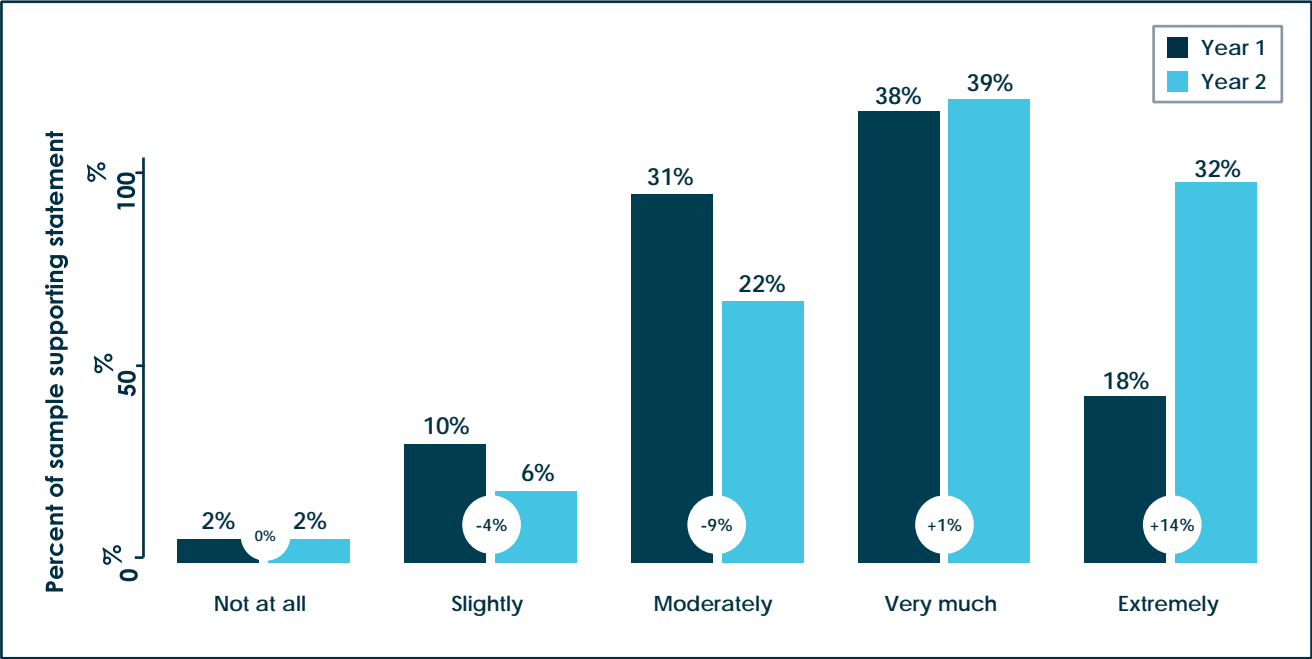


Figure 12: Distributional fairness associated with rural industries (percentage of participants rating agree or strongly agree with percentage change between Year 1 and Year 2)

PANDEMIC EFFECTS

In the May 2020 'Pulse' survey data, we saw some interesting movement on key measures apart from trust and acceptance. The proportion of Australians in agreement that farmers, fishers and foresters manage their environmental impacts effectively, for example, increased by 10% (to 59% of the sample), and agreement that they are "responsible stewards of the land and sea" by 13% to 69%. These ratings had eased by the Year 2 data collection in September-October 2020, to 49% and 62% agreement, respectively.

Ratings of state and federal government ability to hold rural industries accountable also jumped, from 49% agreement in Year 1, to 71% in the Pulse, and then back to 65% in Year 2, in line with the pattern of change in trust in government.

However, community members remained consistent in their view that environmental management should not be compromised for the sake of economic sustainability of rural industries and that environmental management is a shared responsibility across all rural industries. Interestingly, 58% of people also agreed that they were more willing than usual to accept the environmental impacts of food production (e.g. pre-packaged fruit and vegetables) if it means safe supply (13% disagreed with this statement and 29% were neutral).

It appears that COVID-19 heightened community appreciation for and confidence in rural industries, and led to shorter term acceptance of environmental impacts associated with perceived food safety issues, but did not alter the importance of environmental responsibility in general as a priority for Australians.

THE PATHWAYS TO DEEPER COMMUNITY TRUST

In Year 2, we went further into the data to describe the pathways to deeper community trust in Australia's rural industries. We conducted the same path analyses using the Year 2 data (see Figure 13) to see what has changed, and to use the new measures included in Year 2 to provide additional clarity around each of the main drivers of trust. Key insights from these analyses are described below.

PATHWAYS TO TRUST AND ACCEPTANCE

As expected, the key drivers of trust in Australia's rural industries remain consistent in Year 2 with those identified in Year 1, with one exception. Environmental responsibility, industry responsiveness and the value Australians place on rural industry products were all strong and important predictors of trust in rural industries. In addition, in Year 2 the role of distributional fairness, or feeling that Australia in general and regional communities specifically get a fair share of the benefits created by rural industries, increased in prominence and can be considered a chief driver of trust. That is, the more that community members feel that Australia and regional communities receive a fair share of these benefits, the more they trust rural industries.

1.

DRIVES ACCEPTANCE

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ion, with consequences includ
1 (e.g. a moratorium on its act
ation), consumer boycotts, and
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ased acceptance of Australia'
1 rural industries to act respons

2.

IS A VEHICLE

can be seen in the path model to be
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otance on the right and issues of
tance to community on the left. This
s that trust acts as a 'vehicle',
ating community expectations and
iences into their level of acceptance
ustralia's rural industries. As trust
ases so does the level of
otance. Trust is fundamental in
onships between industries and
runity because it creates room for
ation, for benefit of the doubt when
go wrong, and confidence in the
icts farmers, fishers and foresters
ice.

3.

ENVIRONMENTAL RESPONSIBILITY

In Year 2 this was again the strongest driver of trust in rural industries. This is made up of a group of questions that reflect community expectations that rural industries are "responsible stewards of the land and sea, operating sustainably". This combined measure included questions about responsible use of water, effective management of environmental impacts, commitment to working in a sustainable way, placing long-term

YEAR 2 NATIONAL SURVEY

environmental stewardship ahead of short-term profits, and being responsible stewards of the land and sea. Additional analyses in Year 2 have shown us that of all of the environmental responsibility questions included in this measure, there are three that are most important in predicting trust:

- that farmers, fishers and foresters are committed to working in a sustainable way,
- that Australian rural industries use water responsibly, and
- that they manage their environmental impacts effectively.

4.

INDUSTRY RESPONSIVENESS

One of the strongest drivers of trust was industry responsiveness. There are several components to this measure, including that rural industries listen to and respect community opinions and that rural industries are prepared to change their behaviour in response to community concerns. As described above, doing anything is better than doing nothing when it comes to addressing a challenging issue within Australia's rural industries, with the modelling providing understanding of why this is the case: the modelling shows that industries that listen to concerns and respond appropriately, in ways that demonstrate they have heard these concerns, leads to an increase in trust with community.

5.

IMPORTANCE OF RURAL INDUSTRY PRODUCTS

In Year 2, this measure was expanded to include a set of additional questions to help us understand specifically what it is about rural industry products that are most important in driving trust. We found that the role of these products (e.g. meat, fish, eggs) in the Australian diet is very important in predicting trust. Being self-sufficient in high quality produce and that rural industry products was also important, sentiment likely influenced by our experiences as a nation through COVID-19. Of perhaps most interest, however, is that buying and using Australian rural industry products helps Australian community members feel connected to the farmers, fishers and foresters who produced them, and this leads to higher levels of trust in rural industries. This is important as it explains the key link between products and trust; a physical transaction leads to a relational outcome.

2020

6.

PERCEPTION OF THE BENEFITS

In our Year 2 path analysis, we also found that perceived fairness was a significant driver of trust. That is, the extent to which community members feel that Australia as a country, and rural communities specifically, get a fair share of the benefits created by rural industries is important in predicting trust. This has increased in relative importance in the modelling compared to the Year 1 data (i.e. it has become more important for community members). There is an opportunity here for rural industries to consider how they can share benefits individually and collectively to regional prosperity in ways that are increasing community expectation and the role of Australia's foundational industries in an equitable and tangible way to our community now and in the future.



Acceptance



Trust



Environmental responsibility



Industry responsiveness



Importance of product



Distributional fairness

Arrow indicates whether sentiment improved (upward arrow) or declined (downward arrow) since the Year 1 study.

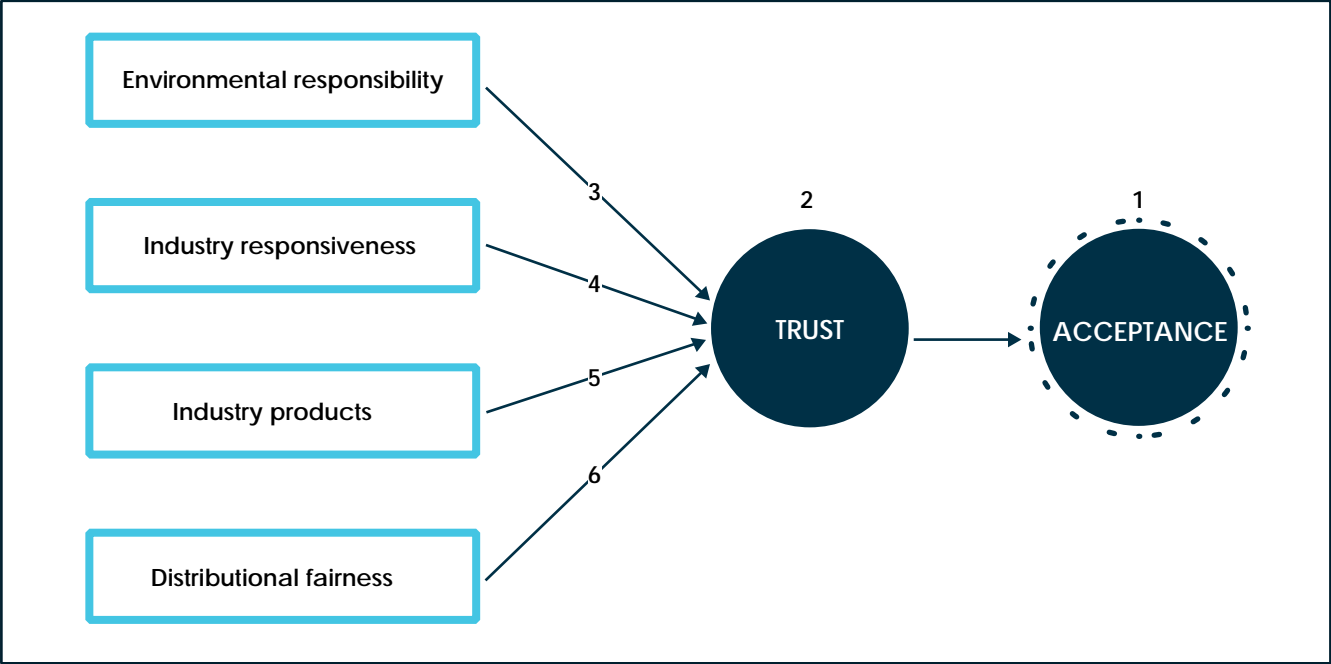


Figure 13: Pathways to trust and acceptance of Australia's rural industries, Year 2

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 in this diagram correspond to the key insights described above it. All pathways in this model are positive, which means that the more responsive that participants feel rural industries are, for example, the more trust in rural

industries they have.

Additional analyses revealed important nuance in the Year 2 path model. Environmental responsibility is such a strong positive driver of trust that we explored what leads to higher ratings on that measure. We found that treating animals (e.g. cows/pigs) with dignity and respect positively predicts ratings of environmental responsibility. And knowing at least one person that works in a rural industry positively predicts both perceptions of environmental responsibility and the extent to which a community member believes Australian farmers treat animals with dignity and respect. This means that there are real differences in levels of trust based on real experiences of community members, not just preconceptions or stereotypical views of farmers.

As in Year 1, there were a range of additional issues and factors that influenced levels of trust in rural industries in the Year 2 data, apart from those described in Figure 13. This included knowledge of the challenges that rural

industries face: the more that community members are aware of challenges such as drought the more they trust rural industries in general. And the more that community members feel that rural industry internal standards ensure they do the right thing (one of the mechanisms for accountability discussed above), the more they trust rural industries in general.

CONCLUSION

The Community Trust in Rural Industries program of work has now completed the second national survey of community attitudes toward rural industries. To date more than 14,000 Australians have been engaged in this program of work and shared their views on a wide range of

topics and issues related to rural industries. From this data, we have been able to show both the pathways to deeper trust in and acceptance of rural industries, and how community views about each of the component parts of these pathways have changed over the last 12 months.

KEY FINDINGS

Year 2 of the national survey of Australian attitudes has demonstrated that trust in and acceptance of Australia's rural industries remains strong. Trust is steady and acceptance has increased. The important role that Australia's farmers, fishers and foresters play in Australian society has been highlighted through the COVID-19 pandemic, and they remain central in Australia's national story.

Through the addition of new measures in Year 2, we understand more clearly why Australians value the product of farmers, fishers and foresters' labour so highly. Specifically, it is the high quality of these products, the role that rural industries play in helping Australia to be self-sufficient, and the role these industries have played in supporting Australia economically via exports during a global recession.

YEAR 2 NATIONAL SURVEY

Australia's rural industries are seen to be more responsive to community concerns than they were 12 months ago, with these improvements evident both in terms of how effectively rural industries listen to and respect community concerns and take action to address them. In this Year 2 data, we were also able to show clearly that Australians expect rural industries to speak up about issues of concern to community members – staying silent on challenging issues leads to lower trust and greater cynicism. It takes courage to step forward when things

do not go as planned, but Australians have indicated this is not only what they expect from important industries but that this can also lead to a deepening of trust and acceptance.

As in Year 1, environmental impacts and sound environmental management are the chief areas where Australians have concern about rural industries. Yet what most strongly predicts trust in our path modelling is the perception that rural industries operate in an environmentally responsible manner.

Community

members expect rural industries to act as stewards of the land and the sea, and to operate in a way that is efficient, adds value to the national economy, and transfers the natural resources they utilise to future generations in a better condition.

Data collected during the early months of the pandemic in Australia (May 2020) show that Australians are not willing to compromise on these issues, regardless of how positively they feel about rural industries in general.

Within the environment space, water is a key issue of concern and additional measures in Year 2 show that community understanding of the way this precious resource is allocated and managed is not high. It may not be enough to reassure community members that Australia's rural industries take these issues seriously, there may be value and community appetite to understand better the principles that underpin water allocation in different parts of Australia.

Community responses to questions about accountability mechanisms bear this out clearly.

Australians have faith in the external mechanisms of accountability like regulation and the power of state and federal governments to ensure rural industries do the right thing, but Australians also want to see more action within industries to hold their own members to account when they do the wrong thing. Interestingly, confidence in these external regulatory mechanisms to protect the interests of community members increased dramatically during the early months of the COVID-19 pandemic, mirroring general increases in trust in government at state and federal levels.

COMMUNITY TRUST IN AUSTRALIA'S RURAL INDUSTRIES

For those rural industries that involve animals, Australians remain strongly invested in their wellbeing. As the Year 2 path modelling has shown, believing farmers treat animals with dignity and respect not only affects how community members see welfare standards but also colours their views about broader issues like environmental responsibility. When Australians can see that rural industries operate in line with community expectations in one important area, they are more likely to believe farmers, fishers and foresters operate in line with community expectations in other important areas.

Regional communities are important for Australia, and this data shows that they remain important to most Australians. The Year 2 data showed that this is not just about the romance of Australia's post-colonial agricultural development (i.e. 'riding to prosperity on the sheep's back') but is grounded in a pragmatic belief that rural industries must ensure that the significant benefits they generate are shared back to the communities that support their operation in a fair way.

The Year 2 data also revealed a strong sense that rural industries need to ensure that their working conditions preclude exploitation and uphold workplace safety standards. Even if the setting is often dramatically different, Australians expect rural industry workers to enjoy the same protections expected in any workplace in this country.

Of importance in this data is that knowing someone that works in a rural industry has an important effect on attitudes toward rural industries, in general. This connection allows community members to understand first-hand the challenges rural industries face and the way these industries manage their operations. In fact, knowing someone that worked in a rural industry was much more powerful in leading to more positive views about these industries than where a community member lived (i.e. city versus country). Facilitating greater levels of these connections would help rural industries to grow their trust and understanding within the Australian community.

Predominantly, Australians build that connection with farmers, fishers and foresters via the products they purchase and use that are produced by Australia's rural industries. This may be the most important advancement

in the Year 2 data, a clearer understanding of why industry products drive trust. Feeling connected to farmers, fishers and foresters through this exchange speaks to the power of a natural product; a transactional exchange that leads to a relational outcome.

As this unique collaborative program of work progresses, rural industries are gaining access to a deeper, clearer understanding of what leads to community trust in them. This work is showing that acting on issues that matter to Australians is not only in line with community expectations for how rural industries should operate but is also the primary pathway to growing community trust in and acceptance of these same industries.



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