VoconiQ
Engagement Science Insights

COMMUNITY TRUST IN RURAL INDUSTRIES

Year Four National Survey

2023

AgriFutures Australia

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VOCONIQ, *Our Story*

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

To learn more, go to www.voconiq.com

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Acknowledgements

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

Contents

Australian Trust in rural industries

Introduction

Rural industries play a special role in Australia's economic, social, and cultural life. They contribute significant export revenues to this country, produce food and goods that Australians depend on, and are prominent in Australian representations of identity. Rural industries are also at the centre of many challenges facing Australia and the world, including response to climate change. They are subject to increasingly complex and dynamic community expectations around environmental management, the treatment of animals, and the use of technologies like genetic modification. In this context, it is critical for Australian rural industries to understand what contributes most to its social licence to operate and how these factors and issues change over time.

The Community Trust in Rural Industries (CTRI) program of research aims to provide timely and effective insights to support rural industries to deepen its relationship with the Australian community through regular nationally representative surveys of the Australian population. From 2019 to 2021, this research provided deep insights into the mechanism that underpins a strong relationship with community members. In this first phase of research, we found that environmental management was a strong and enduring driver of community trust in and acceptance of rural industries in Australia. Moreover, we found that Australians consider environmental management to be the responsibility of all rural industries rather than individual industries related to specific environmental issues.

We found that community values around management of environment and animal welfare issues within rural industries are stable and enduring regardless of context. Through the COVID-19 pandemic, community attitudes to standards in these areas did not shift greatly even as community attitudes toward other aspects of industry practice and priorities changed dramatically in response to this unprecedented societal challenge.

We also consistently observed that community trust in and acceptance of rural industries is strong and positive, representing significant opportunity for rural industries to engage the Australian population with confidence even where the topics of discussion are difficult. Finally, this program has also explored features of the relationship that have emerged through the research, such as the role of industry products in building trust in and connection with farmers. We helped rural industries to understand that physical products provide community members with a tangible way to connect with producers, leading to deeper trust in the relationship more broadly.

As the CTRI program matures, it has evolved to perform an important role in monitoring trust and acceptance in the Australian community. If the first three years of this program were about discovery, the subsequent three years of work primarily aims to track the material issues identified in the first phase of research. Where useful, we will examine in more detail an area of pressing concern. In the 2023 research, we have examined public perceptions of communications about rural industries from a range of sources, and how these are received based on connection to these industries. The following report summarises the findings of the 2023 national survey, including both longitudinal trends on issues we have determined are material to rural industries social licence to operate, and focal questions on communications about rural industries.

Overview of key findings

This is the fourth year of the Community Trust in Rural Industries (CTRI) project. To date we have heard from over 22,000 Australians through our nationally representative annual survey. Over time, we have collected a robust set of longitudinal data that sets out the ways in which rural industries can meet industry challenges and create a deeper relationship with the Australian community based on trust.

Drivers of trust and acceptance

The key drivers of community trust in rural industries remain consistent from our initial findings in 2019. The management of environmental performance by rural industries was the strongest driver of trust in 2023 by a clear margin and increased in relative importance compared to 2021; the better rural industries manage their environmental performance, the more the community trusts them.

Similar to 2021, other influential drivers of trust included: animal welfare, industry responsiveness, distributional fairness (i.e. the extent to which Australians feel like they get a fair share of the benefits created by rural industries), and confidence in regulation of rural industries. This year rural identity became a new driver of trust, and the importance of regional communities was highlighted as a new driver of acceptance.

Key changes over time

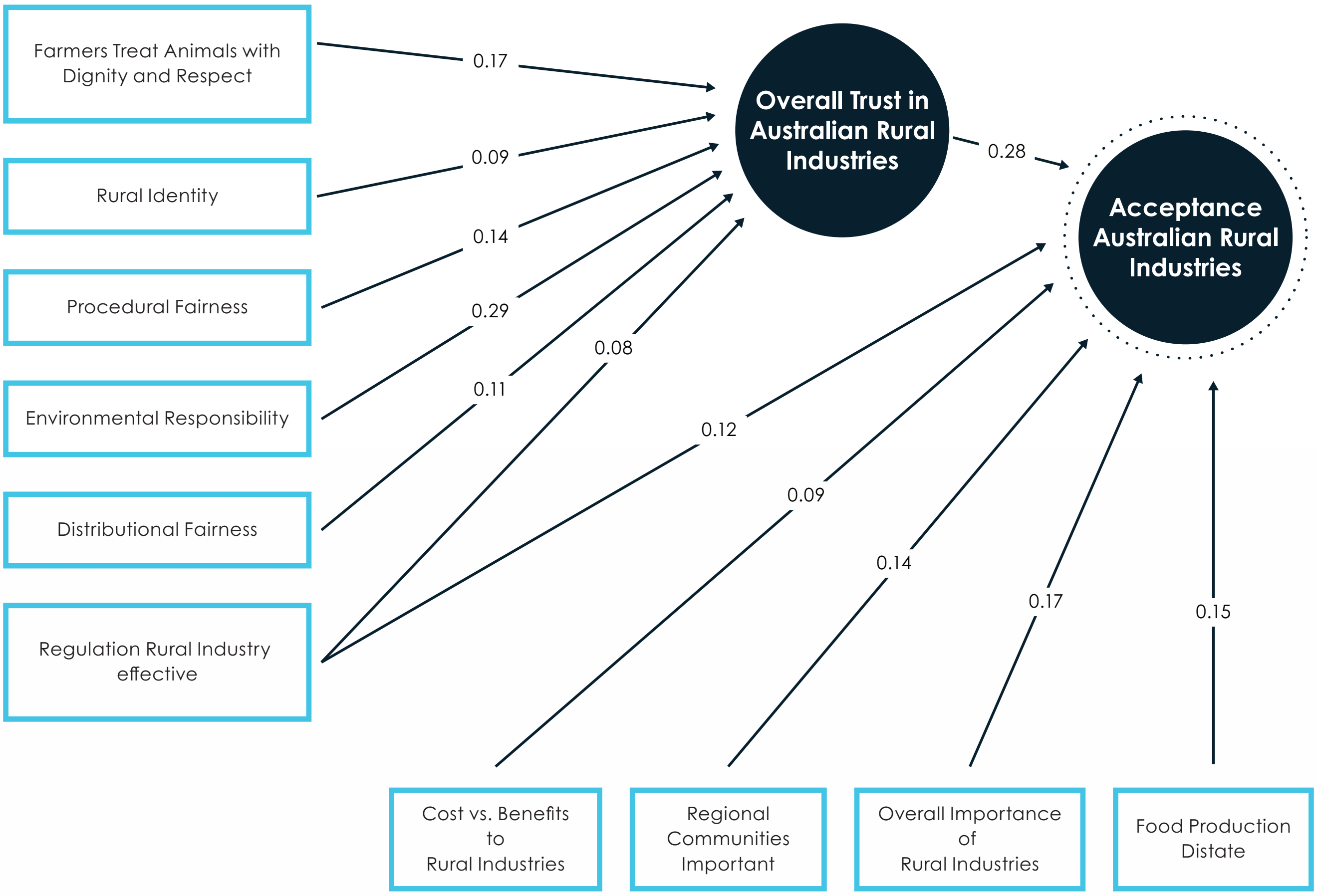
Trust and acceptance levels have remained strong throughout the duration of this program of work. At the beginning of COVID-19 in 2020, both trust and acceptance experienced sharp increases in their scores. While trust has declined to pre-pandemic levels since 2020, acceptance has remained strong and increased by 12% since 2019. This year's data displays that trust acts as a strong and influential driver of community acceptance and remains the key focus for delivering a strong relationship with the Australian community.

Environmental responsibility has continued to grow in importance as a key influence on trust over the years of this research. In 2023, the extent to which farmers treat animals with dignity and respect has increased in its relative importance in predicting trust, and now has more influence on trust than procedural fairness (i.e., the extent to which community members feel rural industries listen to community concerns and are prepared to act on them).

This year, there has been a stabilisation in many of the trends we saw a decline in after the COVID-19 pandemic, including themes surrounding the importance of rural industries and community perceptions around food safety practices, which have not only stabilised but slightly improved. Similarly, community perception of welfare standards has improved this year, as too have opinions around complexity of the issue itself. A consistent trend that has been observed in year four's data is more leniency towards regulatory process, in both perceptions on penalties and effectiveness of regulation of rural industries to hold them accountable to things like water use, food safety standards and animal welfare.

Cost of living pressures have emerged in year four in light of inflation caused by recent global events. While causation cannot be inferred from cost of living pressures, upward trends in many areas are likely correlated to this underlying trend. This theme features in most sections in one way or another, whether it be through a price/ economic trade-off question, perception of importance of rural industries, through leniency of regulation or perceptions on things like drought, climate variability and water use.

New measures included this year included community sentiment towards large food retailers and questions associated with how and in what form participants received information from rural industries.



The research process

Consistent with previous surveys in this program, 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, participants were recruited across the country between 23 May and 14 June 2023. 3, 028 surveys were included for analysis after data cleaning[1].

A key value point in this research is the tracking of key measures over time. For this reason, many of the same questions included in Year One, Two and Three were again included in Year Four. Alongside a comprehensive set of demographic questions, measures of community sentiment toward the following topics were included in Year Four[2]:

- Importance of rural industries in Australian life and nutrition,
- Self-rated knowledge about rural industries,
- Personal connection to rural industries,
- Environmental impacts and management,
- Animal welfare,
- The importance of regional communities,
- The importance of rural industry products,
- Health, safety and working conditions of workers in rural industries,
- Drought, climate variability and climate change,
- Innovation in rural industries,
- Confidence in regulation and internal industry standards,
- Industry responsiveness,
- Trust in rural industries,
- Acceptance of rural industries.

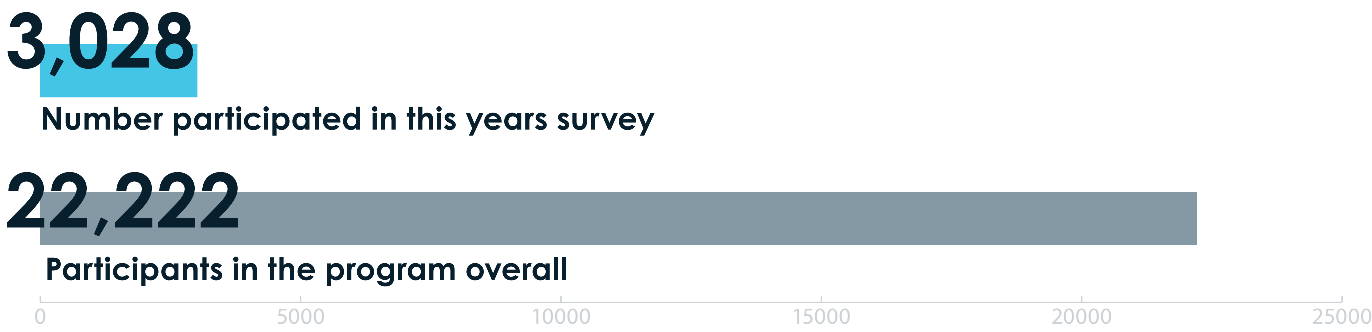
In this year's research, additional questions were included to explore community sentiment toward large food retailers. As a key vehicle by which Australians access rural industry products, these new questions aim to shed light on the nature of the relationship with Australians and the attributes that underpin their trust with the community.

Participants were also encouraged to make freeform comments at the end of the survey, and a selection of these comments are included throughout this report.

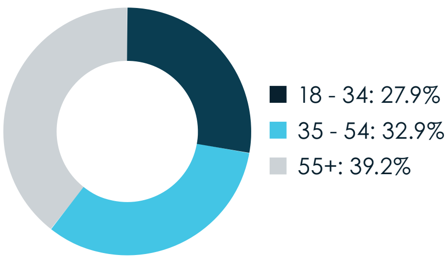
1. 'Data cleaning' is conducted in order to ensure the quality of data included in analyses is high. This involves screening and potential removal of surveys where, for example, participants answered the survey very quickly (i.e. less than 5 minutes), in ways that indicate lack of attention to the content of questions, and extreme or consistent responding on survey questions (i.e. answering '1' to all questions). For more detail on what this involves, see Meade AW and Bartholomew C. (2012) Identifying careless responses in survey design. Psychological Methods, 17(3), 437-455. DOI: 10.1037/a0028085.

2. Most topics were measured using 5-point Likert type agreement scales, where *1 = Strongly disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly agree*. When reporting, categories may be combined to express "agreement" (combining results of Agree and Strongly agree) and "disagreement" (combining results of Disagree and Strongly Disagree).

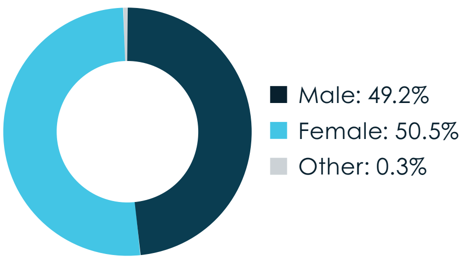
Who completed the national survey?



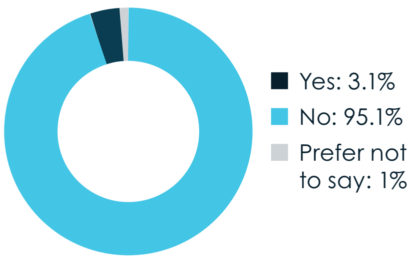
Average age



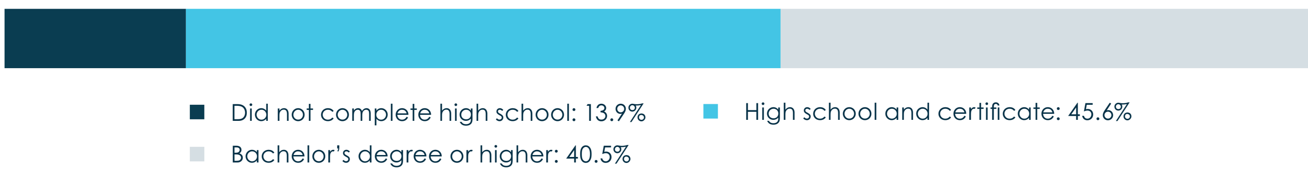
Gender



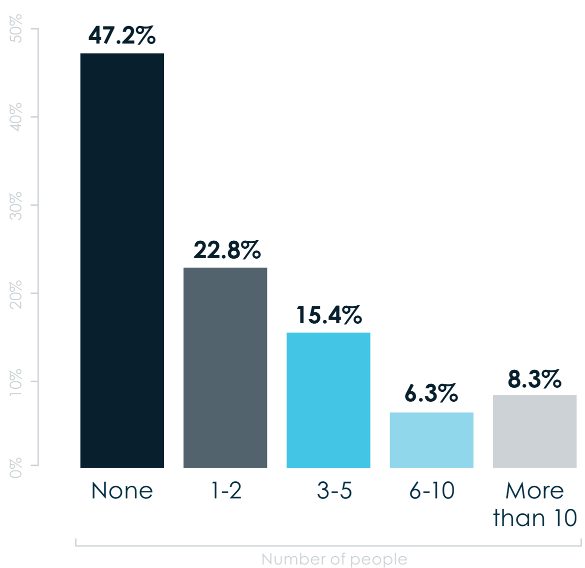
Aboriginal and Torres strait islander status



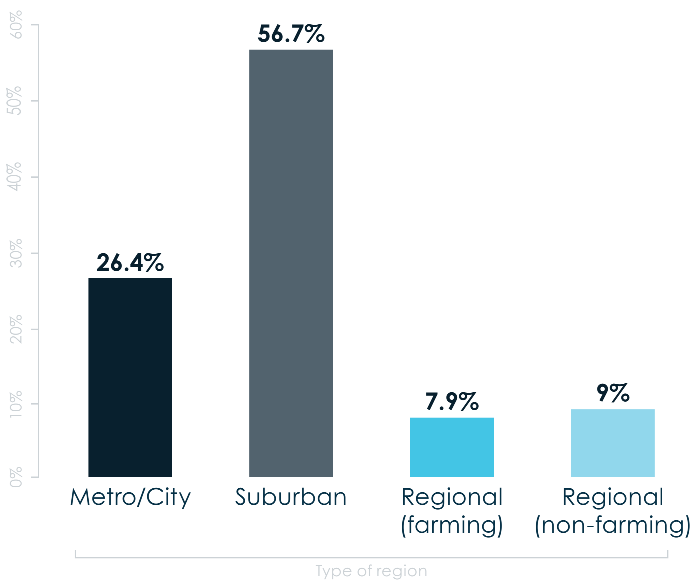
Education level



How many people do you know personally who work in Australian rural industries?



What would you say best describes the region that you live in?



The position of rural industries in Australia

The relationship between rural industries and the Australian community is multi-faceted. Alongside questions that explore industry performance and direct benefits of rural industries, the research has sought to understand and monitor the broader social context in which rural industries operate. Central to this is the overall value Australians attribute to rural industries, their contribution to our daily lives, and their economic impact on the nation.

The Year Four findings reveal that the proportion of Australians that acknowledge the importance of rural industries to our way of life has steadily increased over time, highlighting the growing significance of rural industries. Figure 1 shows that agreement with the statement "Rural Industries are important to way of life in Australia" grew from 88% in 2022 to 91% in 2023. This trend is mirrored when examining specific rural industries. 86% agreed that fishers play an important role in Australian society, 4% more than in 2021 (Figure 1). The importance of eggs in providing nutrition to the Australian diet also experienced an increase this year, with agreement growing from 88% to 92% (Figure 1). Participants acknowledged the role rural industries play in making fresh fruit and vegetables affordable to Australian communities, with 82.8% in agreement with the statement, increased by 1% from 2021 (Figure 2). Agreement that rural industries create local jobs also increased from 83% in 2021 to 85% in 2023 (Figure 2).

> ***"The Australian agricultural industry is extremely important to every person who lives here and we need to protect it at all costs."***

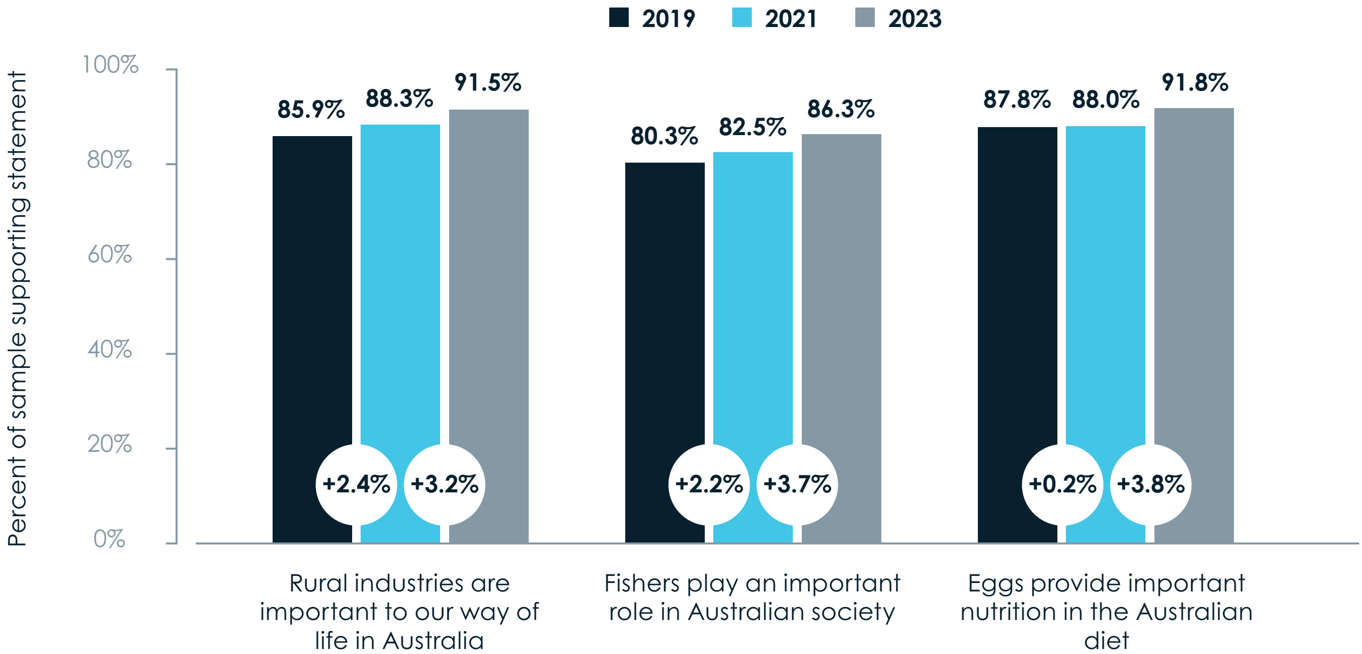


Figure 1: Proportion of agreement rural industries play an important role in Australia, 2019-2023.

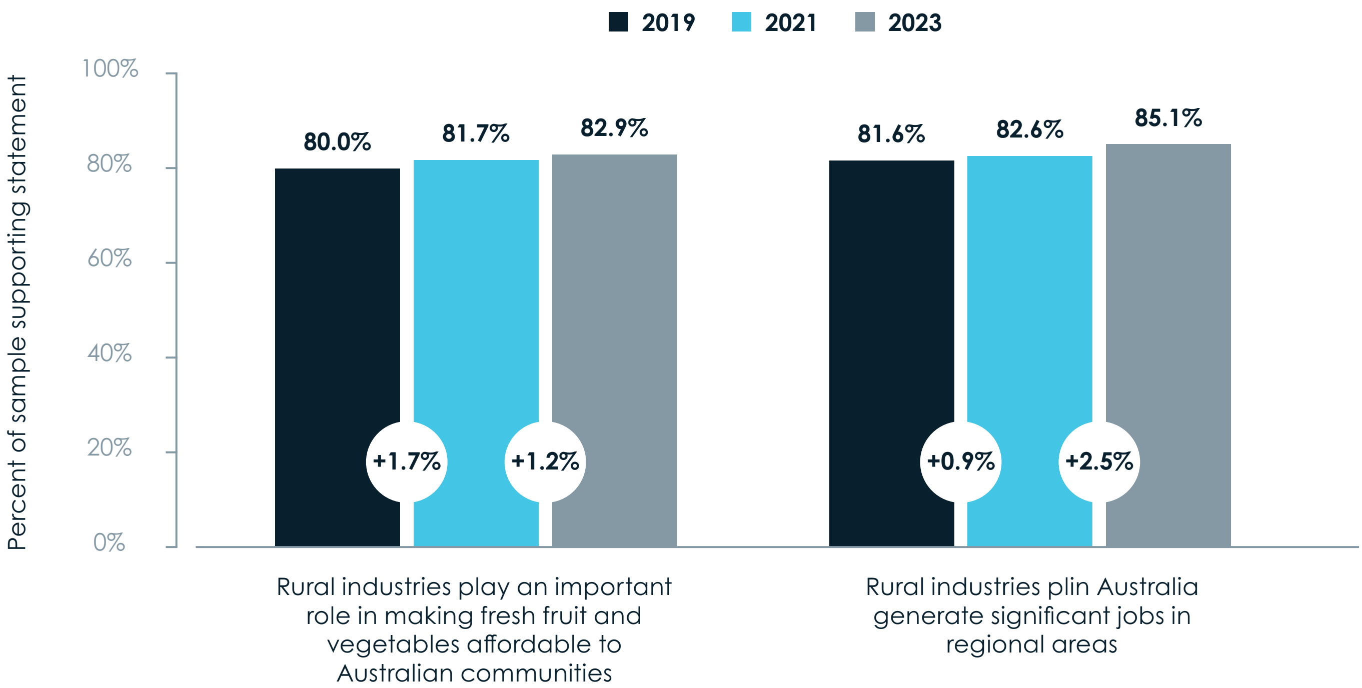


Figure 2: Proportion of agreement that rural industries play an important role in local communities in Australia, 2019-2023

Emerging trends

Rural identity, heritage, and connection of consumers to the products they purchase has emerged as a trend to watch in 2023 as a driver of trust. Understanding the connections the Australian community has with rural industries, and the emotions associated with rural identity factors strongly into the trust communities has. Both "Rural industries are part of my heritage" and "When I buy Australian rural industry products, I feel connected to the farmers, fishers or foresters who produced them" have seen slow declines since they were first asked in the second half of 2020 (See Figure 3). While these declines are modest and scores remain relatively high, the CTRI program has established rural industry products and the sense of connection to farmers they facilitate as a significant driver of trust in rural industries. Declines here will erode broader community trust, especially among specific demographic groups. Analyses have shown younger Australians hold less positive views about rural industries and feel less connected to them. Rural industries need to work hard to ensure new generations of Australians find their own ways to connect with rural industries or risk a more transactional relationship.

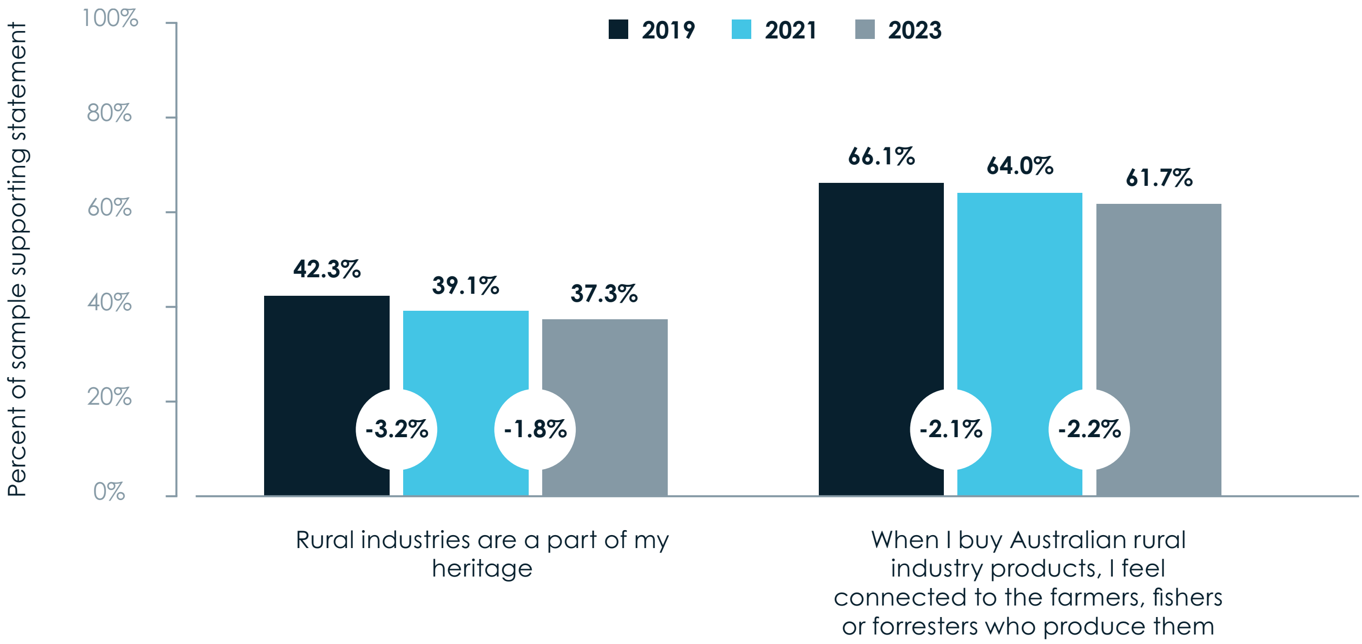


Figure 3:
Proportion of agreement that Australian communities feel connected to Australian rural communities, 2020-2023.

Community trust and acceptance

At the heart of the CTRI program are two key components of the relationship between rural industries and the Australian community: trust in and acceptance of rural industries. In 2023, both community trust in rural industries and acceptance of rural industries activities increased modestly from 2022 (see Figure 4).

Measured on a scale from 1 (Not at all) to 5 (Extremely), the average level of trust in rural industries to act responsibly in 2023 was 3.4. This is well above the midpoint of the scale used, indicating a strong foundation of trust in rural industries.

The average level of acceptance of rural industries in 2023 was 3.9 as measured on the same 5-point scale. Acceptance has progressively increased from the baseline national survey in 2019, where acceptance was 3.6. This represents an increase of 12% in Australians that accept rural industries 'very much' or 'extremely' over the last four years.

Corresponding with the COVID-19 pandemic, both trust and acceptance increased sharply in 2020, and while trust has returned to pre-pandemic levels acceptance has maintained most of the gains recorded through this period. This shows that while trust and acceptance are closely tied in the way they increase and decrease, levels of acceptance are influenced by factors other than trust. In a later section of this report, we provide a summary of more advanced data modelling that shows how trust and acceptance relate to each other, and what else influences community acceptance of rural industries.

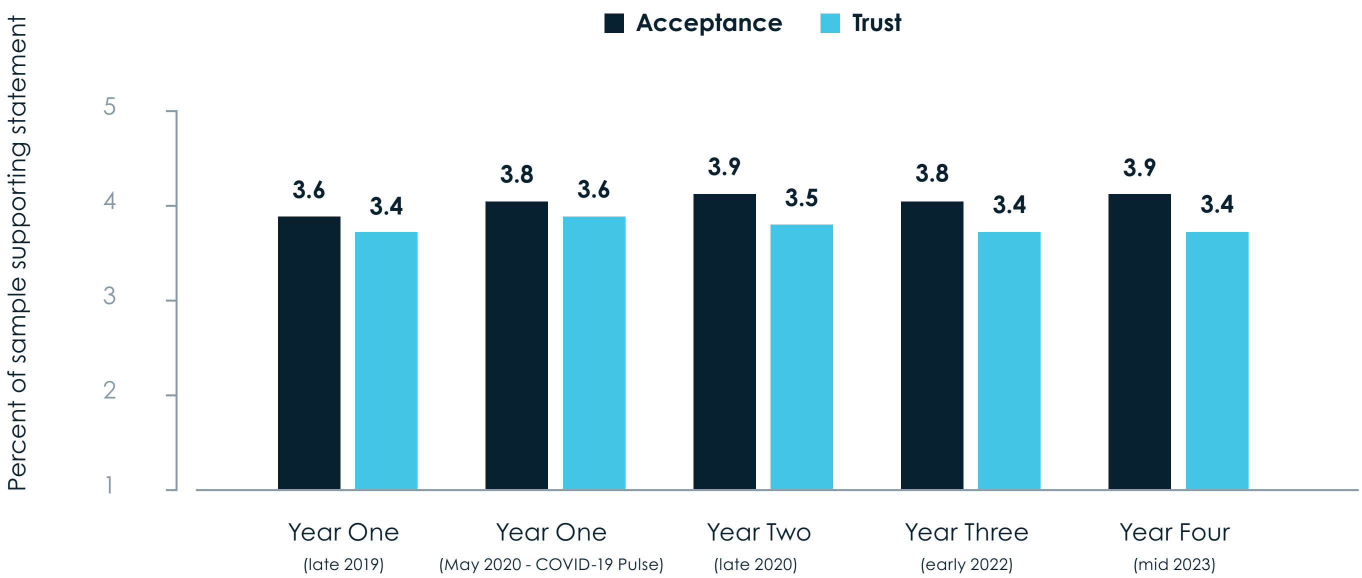
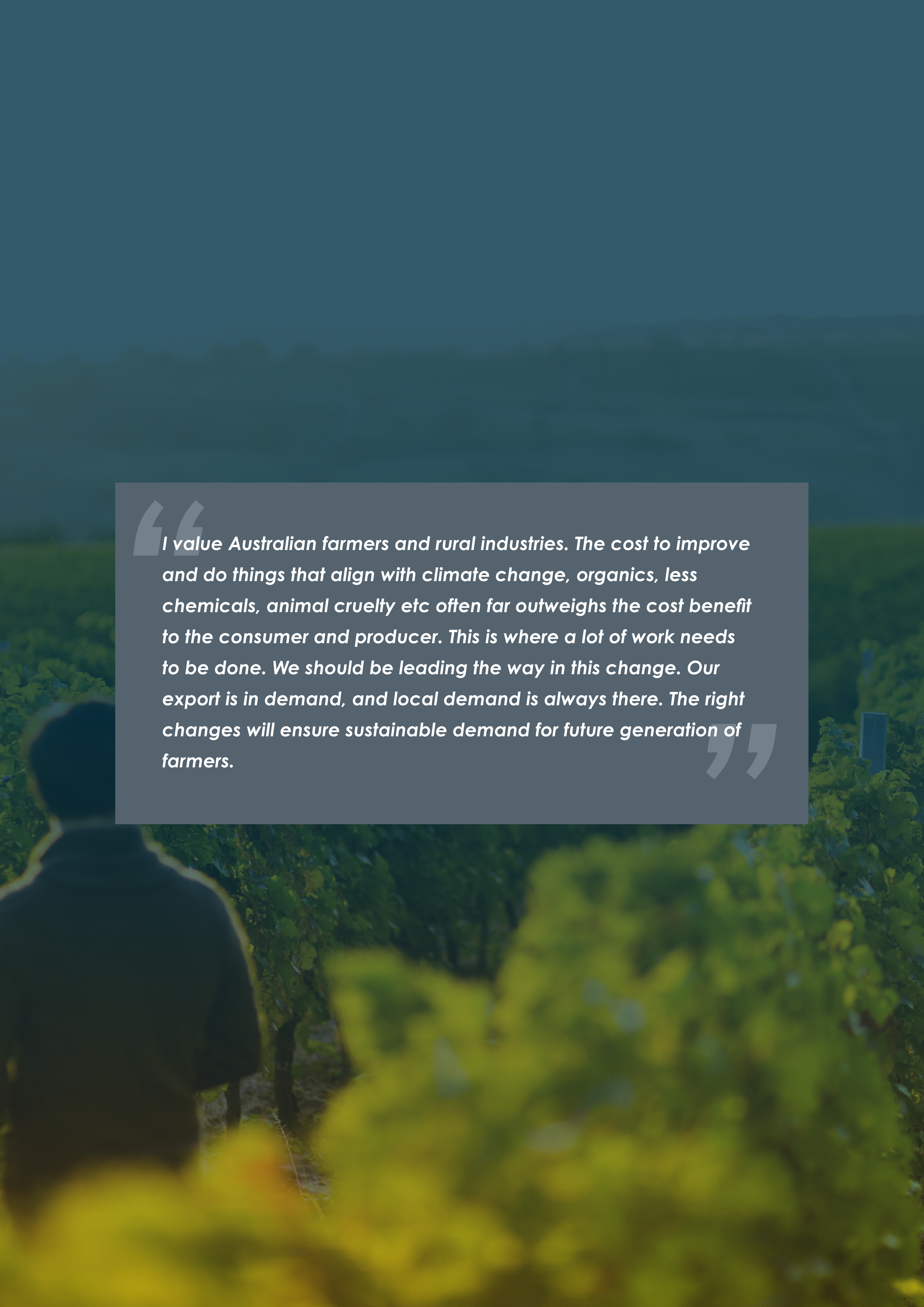


Figure 4: Mean ratings of trust in and acceptance of rural industries, Year One to Year Four.



I value Australian farmers and rural industries. The cost to improve and do things that align with climate change, organics, less chemicals, animal cruelty etc often far outweighs the cost benefit to the consumer and producer. This is where a lot of work needs to be done. We should be leading the way in this change. Our export is in demand, and local demand is always there. The right changes will ensure sustainable demand for future generation of farmers.

Reponsiveness of rural industries

Responsiveness of rural industries has been a consistent and influential driver of community trust in rural industries throughout the research program. It has two main components: the extent to which community members feel rural industries listen to and respect the views of community members, and the extent to which rural industries are willing to act in response to community concerns.

Overall, procedural fairness scores in Year Four were strong and positive, as they have been throughout this program of work. 55% of Australians surveyed were in agreement that rural industries listen to and respect the views of the community (35% were neutral and 10% disagreed (see Fure 5), showing an improvement since 2019 of 5% (see Figure 6). The perception of rural industries' preparedness to change based on community concerns has displayed a steady improvement across each year of the study, with Year Four recording an 8% increase in agreement to 52% compared to Year One (see Figure 6); 37% were neutral and 12% disagreed with this statement (see Figure 5). Consistently positive scores in this space represents a strong foundation for responsiveness, which is critical for building trust.

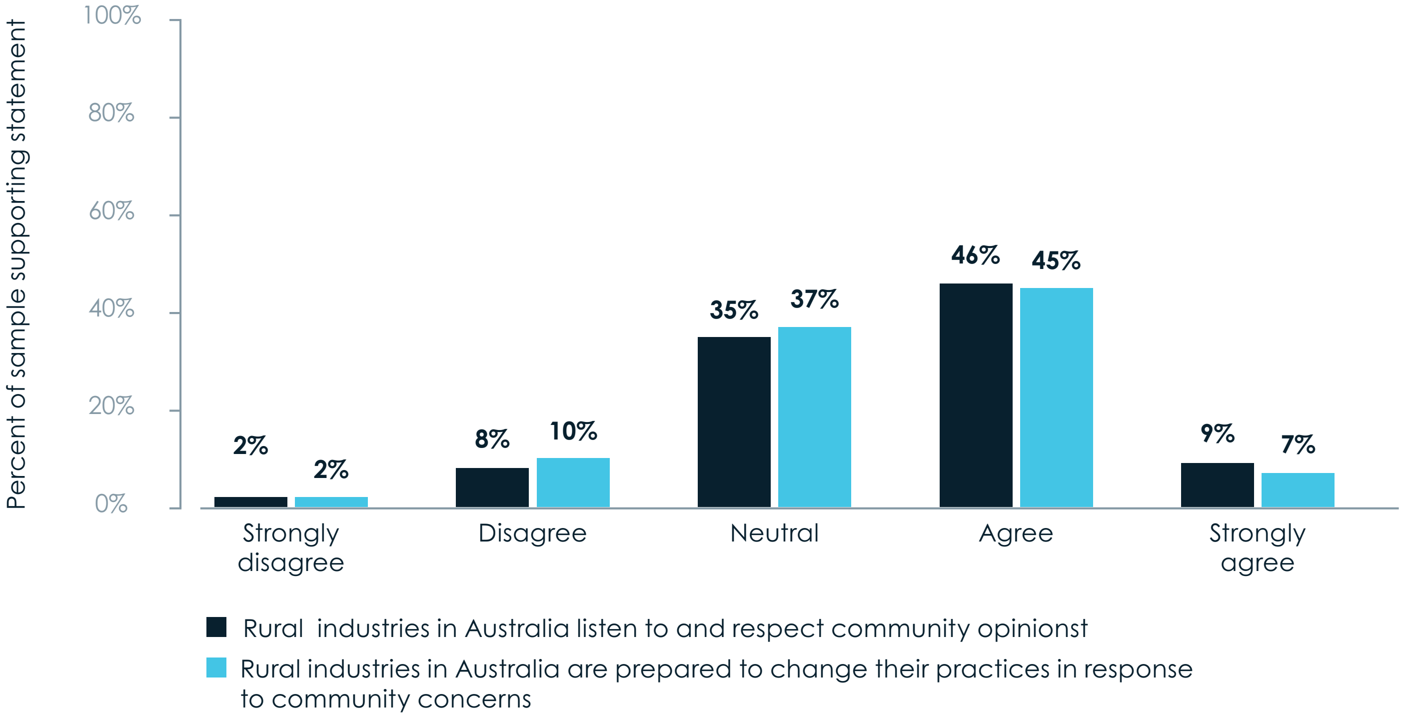


Figure 5: Distribution of scores for responsiveness measures, Year Four.

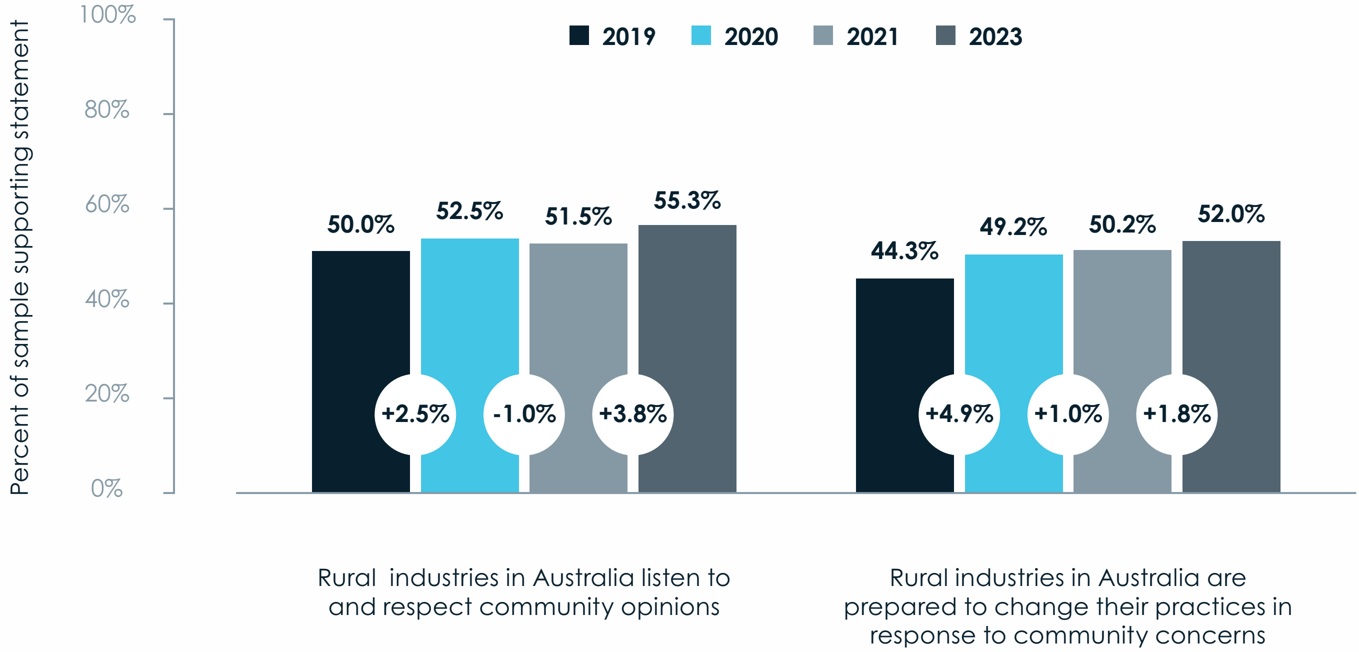


Figure 6: Percentage of agreement with industry responsiveness measure, Year One to Year Four.

How Australians hear about rural industry issues

Throughout the CTRI program, we have examined how Australians receive information about rural industries and their self-rated level of knowledge about rural industries. In Year Four, we went further to ask participants a series of focused questions about the information they receive. The aim of these focused questions was to assist rural industries in closing the gap between information communicated and understanding of how that information was received.

Largely consistent with previous years, participants in Year Four reported their top six information sources regarding rural industries as:

- Television – news programs (63%)
- Internet sources (58%)
- Television – current affairs programs (35%)
- Friends or family (21%)
- Social networking sites (e.g., Facebook, Twitter, etc; 21%)
- Radio (20%)

Consistent with previous surveys, participants in Year Four rated their knowledge of the products that rural industries generate higher (72% selected 5 or greater on a 1 to 10 scale) than their knowledge of the challenges that rural industries face (55%), with knowledge of how rural industries operate lowest (39%).

Looking now at the focus questions, more Australians believed that information they see about rural industries portrays them in a positive light (39%) than a negative light (25%; 36% were neutral). A large proportion (47%) also felt this information "is an accurate representation of Australian rural industries", compared to those that disagreed with this statement (13%; 40% were neutral). A large group of respondents (44%) felt that "most people around me share my views on Australian rural industries" compared to those that disagreed (10%; 45% were neutral). Finally, when we asked the extent to which Australians "actively seek information about Australian rural industries", just 24% agreed, 43% disagreed and 33% selected "neutral".

Responses on these measures varied significantly by how many people working in a rural industry were known to participants. This effect is most evident when looking at participants that reported knowing "more than 10" people working in a rural industry and "none" (see Figure 7). As may be expected, people that know more than 10 people working in a rural industry reported much higher levels of information seeking than those that knew none (48% vs 13%, respectively). They also reported greater levels of agreement that most people share their views regarding rural industries (more than 10: 66%, none: 32%). The groups were similar regarding perceived information accuracy (more than 10: 45% agreement, none: 42%). However, 37% of participants that know more than 10 people working in a rural industry agreed that information they see about rural industries portrays them in a negative light compared to 17% of participants that do not know anyone.

These focus items reveal that people with deeper connections to rural industries may be more attuned to information that portrays them in a negative light, a situation compounded by their much higher levels of active information seeking. Rural industries may therefore have work to do in engaging their industry participants and connected communities to support constructive engagement with non-industry information sources.

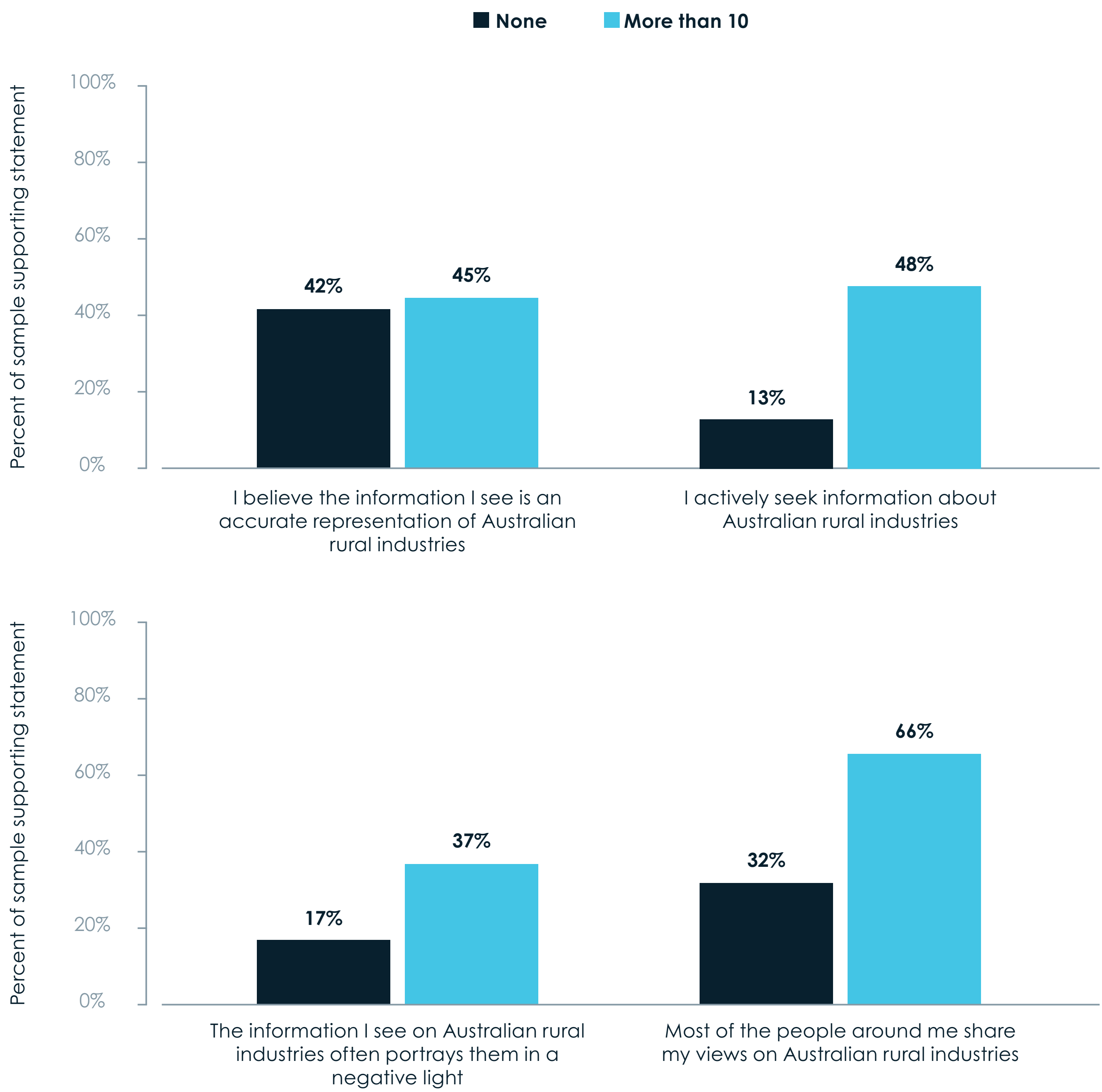


Figure 7 : Percentage of agreement overall for knowledge questions, split by number of people known in the Agriculture Industry, Year Four.

Key issues for Australia’s rural industries

For many Australians, key issues such as water use, animal welfare, and chemical use are of specific concern to them. Over the four years of this program, we have captured the changing views on these topics.

Water use and climate variability

Water is central for Australia’s rural industries. The CTRI program examines water from multiple perspectives, including water use in growing food, fibre and timber; management of ocean resources; impacts on water courses and seas; the impacts of drought on rural industries, and water in the context of climate change.

When asked if “Much of Australia is currently in drought” agreement has declined steadily since Year Two of the program (when this question was first included) from 64% to 40% in Year Four (see Figure 8). Similarly, the question “There will be less water available to Australian rural industries in the future because of climate change” also saw a steady decrease from 63% agreement in Year Two to 58% agreement in Year Four. Finally, the level of agreement that Australian rural industries use more water than they’re entitled to, dropped from 28% in Year 2 to 23% in Year Four.

Since Year Two, we have also included two trade-off questions related to water: “Water should only be used in agriculture industries after making sure the environment has enough” and whether “Protecting the environment is more important than people’s jobs”. Level of agreement declined for both of these items since 2020 from 51% to 43% and 38% to 34%, respectively (see Figure 8). Australians have not changed their views significantly over time regarding penalties associated with misusing water, however, with strong consistent sentiment that these penalties are not strong enough (see Figure 8).

Together, it appears that as community concerns about the presence of drought and the impacts of water availability due to climate change have eased, so have concerns about appropriate use of water in contexts where there are competing demands for this resource.

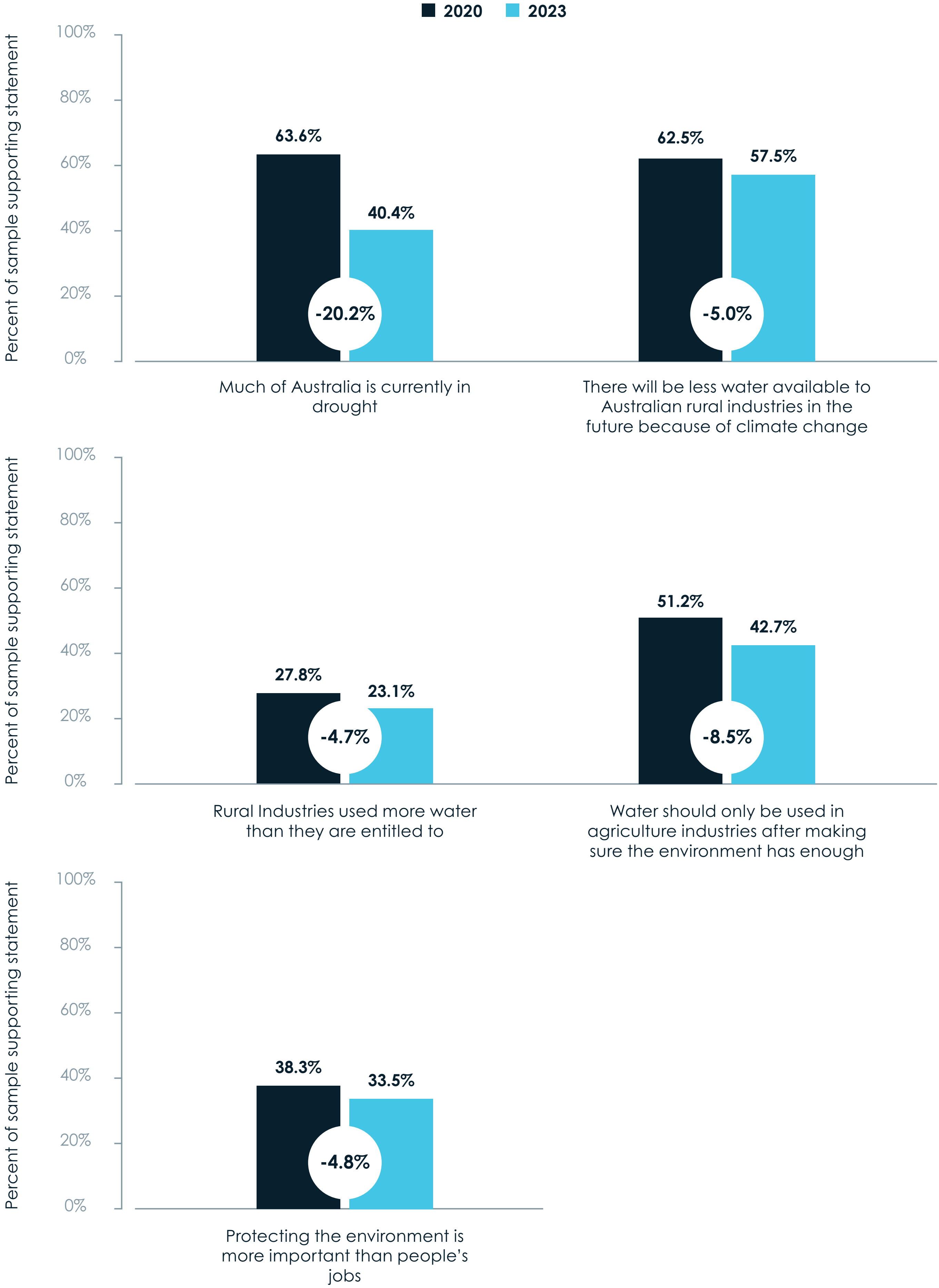


Figure 8: Percentage of agreement with drought and water use questions, Year Two and Year Four.

Food safety and chemical use

In each year of the program, we ask Australians how confident they are in the safety of food produced by Australia's rural industries. Linked to this, we also ask about their feelings toward the use of pesticides and fertilisers. The findings in 2023 are complex. Confidence that "food produced in Australia adheres to strict food safety standards" increased substantially in Year Four (2023) compared to Year Three (2021). As seen in Figure 9, however, the pattern in percentage of agreement with this statement has been dynamic over time.

When asked if Australian farmers should find better ways than using chemicals to increase crop yields and control weeds, 63% of participants agreed in Year Four, a drop of 3% from the Year Three survey. Similarly, when asked if weed control chemicals worry them, 54% of participants agreed, 1% agreement less than Year Three. Similarly, agreement that herbicide and pesticide use is necessary decreased from 46% agreement in 2021 to 44% in 2023.

Perhaps helping to explain this apparent easing of concern about chemical use in rural industries, explicit trade off questions about the use of glyphosate show cost of living pressures may be influencing community sentiment. When asked to respond to the statement "Weed control chemicals like glyphosate should be phased out even if it means food produced in Australia is more expensive", 46% of respondents agreed in 2023 compared to 51% agreement in 2021. When asked a similar question about glyphosate use as a means for ensuring availability and affordability of produce, results in 2023 were consistent with those from 2021 (see Figure 10).

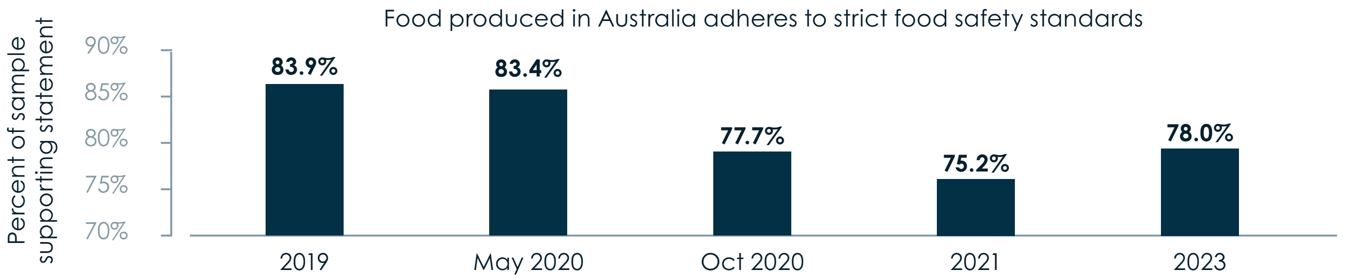


Figure 9: Percentage of agreement with confidence in food safety in Australia, 2019-2023

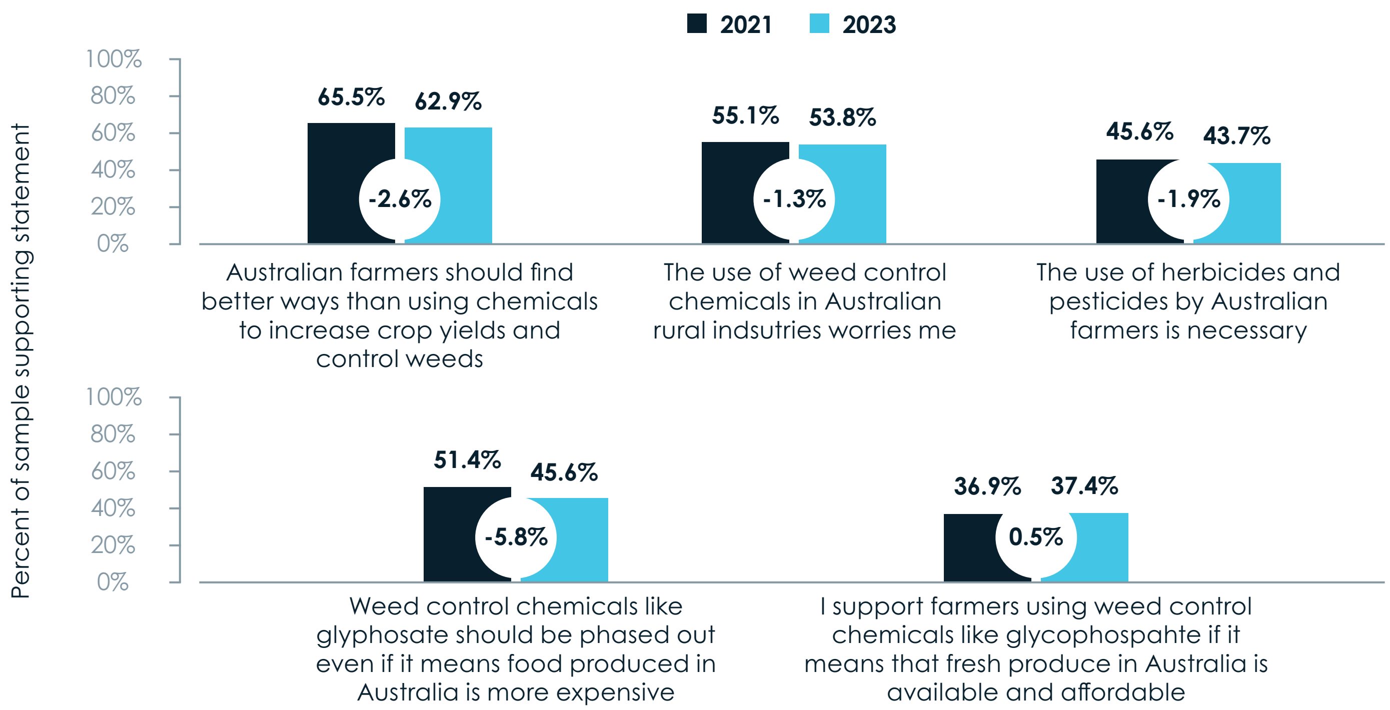


Figure 10: Proportion of agreement with confidence in food safety in Australia, 2021-2023.

Animal welfare

Over the duration of the research Australians have consistently recognised that animal welfare is a complex issue, with levels of agreement reaching 71% this year, the highest level since the beginning of the research. In 2023, Australians feel more strongly that farmers treat animals raised for slaughter with dignity and respect than they did in 2021 or 2020 (see Figure 11).

When asked if animal welfare needs to improve even if it means that meat and dairy prices will go up, support from Australians declined from the Year Three Survey (48% agreement in 2023, compared to 54% agreement in 2021). Australians clearly expressed their expectations around the treatment of animals in their response to the statement "I don't have a problem with animals like cattle, lambs and chickens being slaughtered so long as it's humane", with 72% agreement and consistent with the 2021 survey.

Acceptance of intensive farming of animals to provide food products was also consistent with the previous survey, with 35% expressing agreement although the average score on this measure was only just above the midpoint of the scale used (see Figure 12).

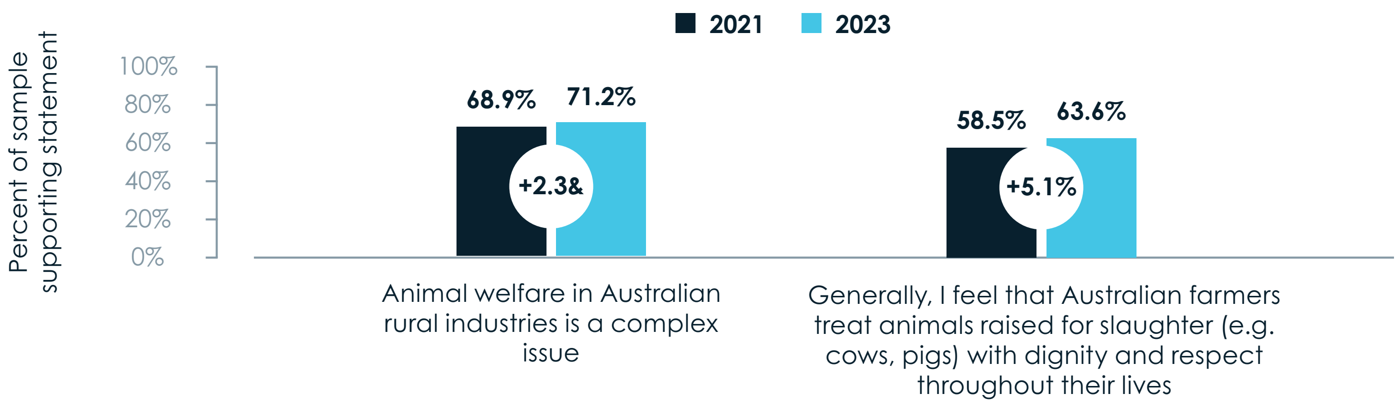


Figure 11 : Percentage agreement for animal welfare questions, 2021-2023.

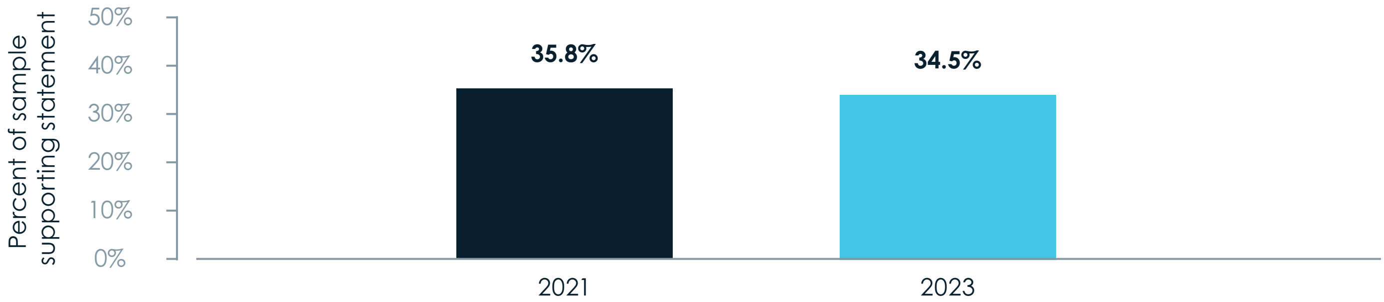


Figure 12: Acceptance of intensive farming of animals (e.g. pork, chicken or egg products), 2023.

Perception of work in rural industries

Rural industries have experienced labour shortages in recent years, like many industries in Australia. Australians are clear that they feel rural industries offer meaningful careers for those that choose to work in the area with 70% agreeing or strongly agreeing with this sentiment in 2023. This represents an 8% increase in agreement from 2021 and a strong positive result for the position of rural industries in a competitive labour landscape. Improvements were also observed in sentiment around rural industries paying a fair wage to its workers, with agreement increasing by 4% to 34% in Year Four. When asked whether worker exploitation was still a serious problem for rural industries, agreement was decreased by 3% to 48% (see Figure 13).

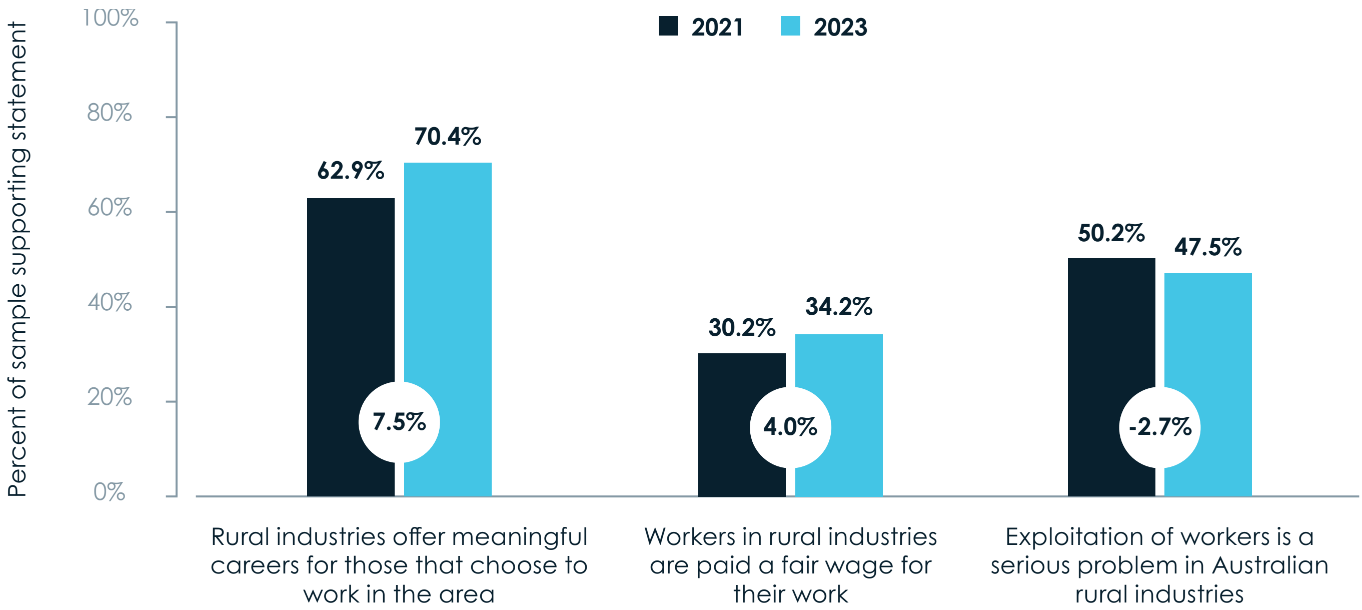


Figure 13: Proportion of agreement with Australian rural industries workforce questions, 2021-2023.

Accountability and benefit sharing

Over the past four surveys, the perceptions around rural industry governance and sharing of benefits have been investigated. Regulation and industry standards are seen as key governance mechanisms that provide confidence to the community that rural industries are accountable for, and addressing issues that are important to the Australian community. This includes both regulation and sharing of the benefits related to rural industries, and results have changed notably over time.

Community shows a strong confidence in rural industry products when asked if "Food produced in Australia adheres to strict food safety standards, 78% agreed or strongly agreed, compared to 75% in 2021(Figure 14). When considering the standards underpinning rural industry products ensuring rural industries do the right thing, agreement has stabilised with 63% agreeing or strongly agreeing in 2023 (64% in 2021) (Figure 14). Notably, when asked about the effectiveness of regulation in rural industries, 25% agreed or strongly agreed that regulation was not effective, and 47% answered neutral, this has improved since the last survey (29% and 48%, respectively) (Figure 14). These findings highlight that regulation is an area of community focus and the community has responded to efforts to improve transparency on regulatory processes.

When asked about the extent to which they feel regional communities receive a fair share of these benefits, 49% agreed or strongly agreed, increasing from 48% in 2021. When considering national benefit this year, 58% agreed or strongly agreed, increasing from 56% in 2021 (Figure 14). Here, opportunities arise for the industry in regards to non-financial benefits, outside of core key messages of jobs and economic growth.

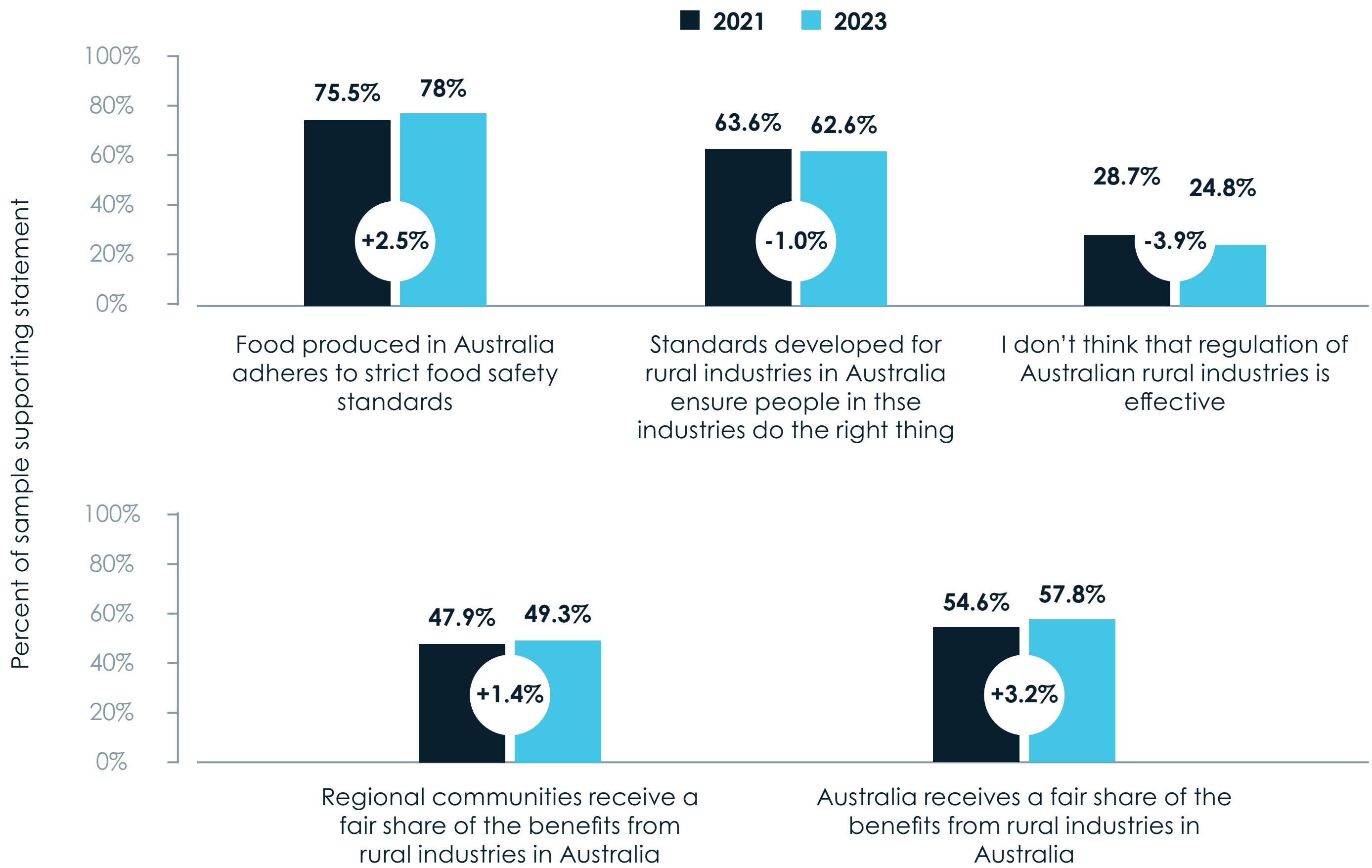


Figure 14. Percentage agreement for accountability and benefit sharing questions, 2021-2023.

Pathways to increased trust and social acceptance

This program has been created to support Australian rural industries to identify and focus on ways to positively influence community trust and acceptance in their industries. In each year of the research program, we have used a statistical method called Path Analysis to determine how rural industries may achieve this most effectively. This analysis is valuable because it provides a clear understanding of what influences or drives community trust in and acceptance of rural industries.

Throughout the program, we have seen several drivers of trust and acceptance remain consistently important in this path modelling. Environmental management by rural industries, for example, has and remains a dominant component in the sector's social licence to operate. In 2023, the model is cleaner and simpler than in 2021, reflecting a narrowing of focus within the Australian population about what matters most in this relationship (see Figure 17). This represents a strong opportunity for rural industries to take this lead and focus its thinking and actions on issues that are material to its relationship with the Australian community.

Key features of the model

Trust is central and drives acceptance

Trust sits centrally in the 2023 path model, as it does in each of the preceding models for rural industries in the CTRI program of annual surveys. This shows that trust is not only a key predictor of community acceptance of rural industries, but also a key vehicle through which community expectations and experiences related to rural industries influences this key outcome measure. What is practically important in this observation is the need for rural industries to focus on trust building activities and to treat acceptance as largely a product of its actions in the areas that predict trust.

Building trust has a range of benefits for an industry or sector. It provides greater benefit of the doubt for when things go wrong, for example. Responses to accidents or incidents are viewed less cynically by community members where baseline trust is higher. Greater trust also enables industries to engage community on more challenging issues with confidence that the relationship is robust and can handle the potential strain. Finally, trust creates space for innovation, activity that requires experimentation and failure until a novel solution to an existing problem is found.

Environmental responsibility

In Year Four, as in the previous Three years of research, environmental responsibility was the strongest driver of trust in rural industries. In 2023, the primacy of this driver relative to others in the model has been accentuated such that it now stands apart; as community confidence that rural industries are managing their environmental impacts effectively increases, so does trust. The environmental responsibility driver contains a range of measures from the survey, including question related to responsible water use, impact management, sustainability commitments and practices, and placing environmental outcomes ahead of profit making for rural industry participants. This means that this driver has two distinct elements: a focus on current practices and management strategies and an emphasis on forward looking, intergenerational stewardship of the resources rural industries utilise to produce food, fibre and materials.

Animal welfare

Animal Welfare has increased in its importance in the 2023 model relative to previous years. In 2023, it is the second strongest driver of community trust in rural industries; the more that Australians feel rural industries maintain high animal welfare standards, the more they trust them. As described above, we use multiple measures to understand community attitudes toward the treatment of animals in rural industries. The most important measure in its influence on trust in rural industries in 2023 was the extent to which farmers are seen to treat animals with dignity and respect.

Industry responsiveness

A strong driver of trust in each of the four years of the CTRI is industry responsiveness. There are several components to this measure, including the extent to which rural industries listen to and respect community opinions and their willingness to change their behaviour in response to community concerns. As community confidence grows that rural industries are genuinely engaging with them in authentic ways regarding their concerns, trust in rural industries will grow.

A fair share of the benefits

The more that Australians feel that the nation, and regional communities get a fair share of the benefits that flow from rural industries, the more they trust rural industries. For rural industries this represents real opportunity to demonstrate how they contribute to resilient, thriving regional communities as a trust building strategy. While benefits in this context are usually defined in terms of economic value, rural industries may seek to broaden this view to incorporate investment aimed at building the resilience of regional communities that host rural industries such as emergency preparedness capacity, communications infrastructure, mental and physical health initiatives, and community leadership.

Confidence in regulation

When community members feel that rural industries are being held accountable by governments, regulations, and standards of practice, their trust in rural industries is higher. This may be seen as a measure of the extent to which community members feel their interests and expectations of rural industries are being met through these more formal instruments of influence. This is particularly important for industries where the activity taking pace happens 'out of sight' as much of that in rural industries does for most Australians. This driver also highlights the importance of governance as a driver of trust in industry. Very often, industries speak with frustration about the cost of regulation – this finding demonstrates there is value in public respect and support for the 'umpire' even if the players disagree with their decisions from time to time.

Rural identity

A new driver of trust emerged in 2023: rural identity. The more that community members feel a personal connection to rural industries, through their own family heritage or simple affiliation with the emotions it evokes, the more they trust them. However, declines in the strength of this sentiment among community members in the 2023 data suggest there is an opportunity for rural industries to reinforce the connection they have with many Australians, our way of life, and our national story.

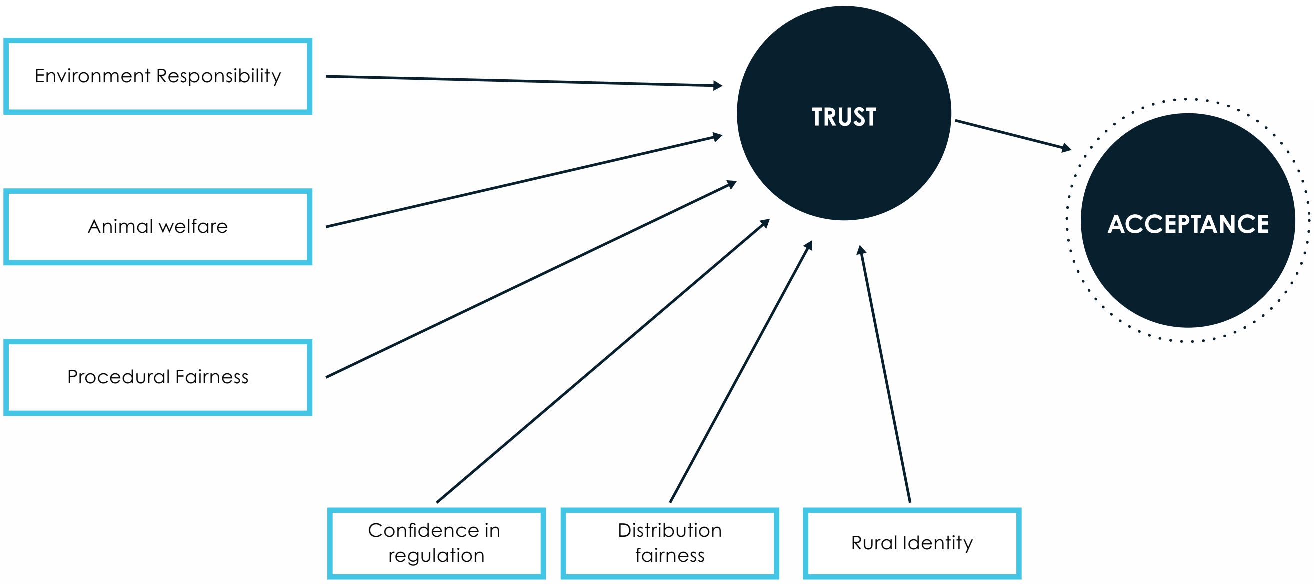


Figure 17: Pathways to trust and acceptance of Australia's rural industries.

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 (e.g. trust leads to acceptance). The width of the arrows denotes their importance in predicting the measure they point at; thicker arrows represent stronger relationships. Black arrows represent positive relationships between measures (e.g. greater confidence in regulation leads to higher trust) and red arrows represent negative relationships between measures (e.g. greater concern about chemical use leads to lower levels of trust). All pathways in this model are positive, meaning the more responsive that participants feel rural industries are, for example, the more trust in rural industries they have.

Conclusion

The CTRI program of research has engaged more than 22,000 Australians since 2019 from across the country to explore the issues that shape the nature of its relationship with the Australian community. 2023 marked the beginning of a second phase of activity for CTRI, shifting from discovery and exploration to tracking material issues in the relationship between rural industries and the Australian community identified through the first three years of this work. The program is unique in exploring not just ‘what’ community members think about rural industries, but ‘why’ they think that way. Through the application of path modelling, we can provide rural industries with a ‘recipe’ for social licence to operate as well as track the key attributes that characterise it.

The name of this program of research speaks to the central role that community trust plays in rural industries’ social licence to operate. As the 2023 path model demonstrates again, community trust in rural industries is a key driver of social acceptance of rural industries; as trust increases acceptance strengthens. Levels of community trust in rural industries are strong, relatively stable, and positive, with acceptance levels increasing modestly also. This reflects real opportunity for both sets of parties in this relationship to engage with each other on issues of consequence.

In 2023, environmental management stood alone as the strongest driver of community trust, elevated above all others. For rural industries, this should reconfirm the importance of issues such as water use, environmental impact management, and resource sustainability across their activities. The broader climate context was also prominent in this factor, emphasising the opportunity that rural industries have to contribute meaningfully to addressing this global challenge. While environmental management elevated in relative importance as a driver of trust and acceptance, community concern for water resources, for example, or water availability under future climate conditions, eased in 2023 compared to past years. There are still strong levels of concern that penalties for misuse of water are not strong enough, but in general community members have indicated that environmental management is both the most important contributor to rural industry social licence, and that their concerns about critical aspects of this issue have decreased.

In line with the opportunity that strong levels of community trust afford rural industries, animal welfare represents another set of issues where community members may be engaged more actively. The Year Four modelling demonstrates that animal welfare is the second strongest driver of trust in rural industries while average responses to welfare items show important improvements in community perceptions of rural industry practices. Together, these two elements provide the basis for real confidence within rural industries that involve animals for taking on potentially challenging conversations. Important in this context is the finding in 2023 that more than seven out of ten Australians surveyed recognise that animal welfare is a complex issue, and the most confident since 2020 that farmers treat animals with dignity and respect.

A neglected aspect of discussions about trust between companies and industries and the social context in which they operate are the key elements or pre-requisites for trust in these relationships. Trust may be practically defined as the willingness to be vulnerable to the actions of others based on positive expectations of their intentions or behaviours. For trust to be established, it is also necessary to demonstrate competence, humanity, and integrity. Placing this into a rural industries context, community members trust, for example, that the vulnerability of animals in their care are treated with dignity and respect. They expect that industries that involve animals have the required knowledge and expertise to do this in line with agreed standards (competence), reflect community expectations for humane treatment (humanity), and are appropriately open and transparent about failures to uphold these standards and respond effectively to remedy and prevent future breaches (integrity).

For rural industries, there are clear pathways for improving community sentiment on issues like environmental management and animal welfare through a deeper understanding of how trust is established and developed over time. There may be utility, for example, in assessing industry practices with reference to the key components of trust, above, from research and development through to on-farm practices and export marketing. In doing so rural industries may find value in identification of weaknesses and risks in practices and priorities as well as opportunities to tell authentic stories about progress toward greater alignment with community expectations.

New in 2023 was the emergence of rural identity as a significant driver of trust. A sense of connection and shared identity with rural industries experienced by community members positively influences how much they trust rural industries. It is concerning, therefore, that this sense of connection is declining over time. This is particularly the case among younger Australians. Finding new ways for rural industries to connect to (younger) people is not a new challenge for rural industries, but the stakes are revealed in this research to be high. Connection drives trust and acceptance. Put another way, loss of affinity leads to disconnection and social risk.

The items we used to measure this sense of connection asks community members about their heritage (i.e., generational connection to farming through family) and general affinity with the nature of farming and sense of connection to the land. In seeking to foster or even simulate these feelings among Australians to create a greater sense of connection, rural industries may consider other areas of overlap in the identities of Australians that do and do not have direct connections to rural industries. On environmental management and animal welfare, for example, there may be opportunities to help community members see the consistency in the values of each group. It is in the overlaps that connection may be found.

Finally, we examined a focal topic in this Year Four research: how information about rural industries is received and interpreted. Industries often feel that if they can just tell their story more clearly, more loudly, that community members will understand a truth that is self-evident to those that commit their lives to an industry. This is rarely effective. An analysis of the information questions we included this year also revealed that deeply held assumptions within many rural industry participants are worth re-examining. Specifically, most Australians feel (or are neutral on the topic) that rural industries are presented in a positive light in information they consume. A large proportion also feel this information is accurate.

When these data were examined by number of people known that work in a rural industry, an interesting pattern emerged. When we looked at people who knew more than 10 people working in rural industries and compared them to those who didn't know anyone, we discovered that 37% of those who knew more people thought that the information they saw about rural industries was negative. On the other hand, only 17% of those who didn't know anyone felt the same way. The challenge of communication may not be with the community at all, it may be that those people most deeply rooted in rural industries are paying too much attention to negative perspectives they encounter, or indeed seek out. This in turn is compounded by our finding that 66% of participants that know more than ten people in rural industries feel that their views are shared by most people compared to just 32% of those that do not know anyone working in a rural industry.

The CTRI program has shown an increasing level of support for the importance and contribution of rural industries to social, economic, and practical dimensions of life in Australia. To engage more effectively in the pursuit of even deeper levels of trust and higher levels of acceptance in this country, there is value in helping those that work in and alongside these industries to understand the high standing they have with Australians. Rural industries face many challenges, but perhaps the greatest may be having faith in the value proposition it presents to the Australian community and the confidence to focus on the audience that matters most in deepening its social licence to operate: the Australian community.

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