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Evaluating the impact and effectiveness of the Australian Beef Sustainability Framework

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Abstract

The Australian beef industry contributes over A\$12 billion annually to the national economy and provides significant livelihood benefits, especially in regional Australia. Grazing occupies more than half of the continent highlighting its significance to national sustainability efforts. In 2017, the Australian Beef Sustainability Framework (ABSF) was developed to meet changing community and consumer expectations. This project evaluates the successes, challenges and trust building potential of the ABSF by drawing on 40 in-depth interviews with key industry and external stakeholders.

Participants viewed the ABSF as a ‘great start’ with much potential to positively influence stakeholder trust in the industry. A key challenge for industry is the diverse cultures that surround sustainability both internally and externally, which has implications for how issues are addressed and communicated. This raises the need to carefully balance expectations for how broad or narrow consultation for the framework should be. Based on the findings, we recommend the development of transparent evaluation processes for the ongoing adaptation of the ABSF. This should include regular external and independent assessment balanced with clear pathways for internal stakeholders to contribute. Balancing these is essential to ensure confidence that the industry can respond to external interests while maintaining legitimacy within the industry.

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Executive summary

Context and aims

Australian livestock industries are facing unprecedented public scrutiny and changing community expectations. Over 50% of the Australian landscape is used for livestock grazing, making the industry integral to the stewardship of land and water and the protection of natural and cultural heritage. In response, in 2017 the Australian beef industry worked with a range of internal and external stakeholders to develop The Australian Beef Sustainability Framework (ABSF). This framework was developed to address changing community and consumer expectations and measures indicators across four key themes: Economic resilience, Animal welfare, Environmental stewardship and People and the community.

This project, conducted by The University of Queensland, seeks to evaluate the ABSF to inform future development and adaption of the framework.

Specifically, this project aims to evaluate:

- The successes and challenges of the Australian Beef Sustainability Framework (ABSF) launched in 2017,
- The process used to develop the ABSF, and
- The effectiveness of the ABSF as a trust building mechanism.

The project further aims to inform future evaluations of sustainability efforts within the Australian livestock industries.

Approach to the research

This research draws on 40 semi-structured, in-depth interviews with key internal and external stakeholders representing a range of professional roles related to the beef industry. All participants had a minimum of 5 years' experience in their current role or similar roles. Not all stakeholders were directly involved in the ABSF carriage and development. Participants completed a short survey prior to the interview which asked them to evaluate and rate the ABSF's 10 priority areas in terms of their relative *importance* to the industry and the influence of *industry practices, internal industry governance, trade, government regulations and policy settings* on those priority areas. They also rated how well the industry was communicating progress on each sustainability priority area.

Overall findings

Successes of the ABSF

Participants generally held a positive view towards the ABSF, seeing it as a 'great start' for the industry. The framework has been successful in initiating conversations on the challenges of sustainability and has served to build relationships across diverse stakeholder groups. These conversations have enabled in-depth discussion of what the priorities for sustainability should be, and how to monitor, report and communicate progress against these priorities. The framework provides concrete evidence of an industry-wide demonstrated commitment to sustainability. For example, the industry's target to be carbon neutral by 2030. However, incorporating the full and evolving range of perspectives on sustainability is likely to be an ongoing challenge for the ABSF and its reporting.

Many participants felt that the ABSF has the potential to positively influence both internal and external stakeholder trust in the beef industry. However, it was emphasised that for all sectors of

the industry, it is necessary to ‘walk the talk’ with demonstrated commitment to improved sustainability practices combined with transparency and improved communication.

Challenges for the ABSF

There are diverse attitudes and cultural norms around sustainability, and to change in general, within the industry. Some participants view this lack of a shared understanding of sustainability as a threat to the industry's capacity to maintain trust and a ‘social licence to operate’. In contrast, other participants viewed achieving sustainability as an end point that can be reached with incremental and modest change. Engaging with, and balancing, these various views, as well as differing internal and external expectations, will be an ongoing challenge.

In addition to these broad cultural and attitudinal issues, there was much discussion about the challenges of improving aspects of land management, greenhouse gas emissions and animal welfare. Building workforce capacity and improving the health, safety and wellbeing of people in the industry were other significant challenges. While it was recognised that much is being done to address these priority areas, it was felt there is considerable room for improvement.

Another challenge is the generation of meaningful, accurate, and verifiable data that speaks to progress against the ABSF priorities. Some participants cautioned that reporting against the ABSF must not only measure what is ‘easy’ or looks good, because it runs the risk of communicating data that is ‘too rosy’, skewed, or perceived as ‘greenwashing’.

Relatedly many participants reported that the beef industry does not communicate effectively. A common, but not universal view, was that the industry needed to be better at ‘telling our story’, in order to gain trust and acceptance from the broader community. This one-way view of communication was built on the assumption that the industry just needs to better ‘inform’ the community and external stakeholders about its sustainability practices. In contrast, others viewed the need for better two-way communication and relationship building with communities. Another perspective was that industry should stay out of the media as much as possible due to the risk of making poorly considered and potentially reactive messages in an overcrowded social and traditional media landscape. These diverse views of external communications will require careful attention and development.

Views on the process of developing the ABSF

The ABSF was celebrated for bringing together a range of stakeholders. However, some participants reported a need to ‘cast a wider net’ to include more diversity in its development. For example, some internal industry stakeholders felt the ABSF was too producer-focussed and needed to actively include additional voices (e.g. processing, livestock transport, and live export sectors). Some external participants suggested including some of the more ‘extreme’ stakeholders such as animal rights activists into ABSF discussions. Others were reluctant to ‘cast a wider net’ due to concern it would lead to unconstructive conversations and potential marginalisation of parts of the industry that feel poorly represented. Without internal industry support, particularly from those not directly involved in the development of the framework, the ABSF risks losing legitimacy.

The ABSF as a trust building mechanism

Overall, there was a broad acceptance that the industry, and most within it, have good intentions and the appropriate culture to work towards sustainability. There was recognition that the industry must, and has the capacity to, adapt. The rate at which these changes are occurring is variable, with some recognising it is initially slow and reactive, but this does not diminish that progress to-date. The industry was described as having a ‘long tail’ and, despite many proactive and well-performing people and businesses, the poor sustainability performance of some individuals erodes the public’s trust. How the whole industry manages ‘calling in’ or ‘calling out’ bad practices can help build broader community confidence. Not surprisingly, several participants highlighted the significant risks that a single ‘bad news story’ has for the entire industry.

Participants identified the need to shift the narrative from a generally defensive position to a proactive one - or from a ‘victim’ to ‘responsible steward’ story - to increase confidence. Similarly, many participants identified that avoiding motherhood statements and instead communicating clear commitments supported by specific targets, ongoing actions, and measurable outcomes, builds confidence and trust.

Transparency was seen as important for trust and requires concrete data and evidence which is gathered and communicated in a way that is acceptable to a range of stakeholders. Transparency also involves acknowledging past and present problems and issues and indicating a pathway to improvement.

The ABSF has helped drive industry change and a key mechanism for enhancing community confidence and trust. In some cases, this was tempered with caution that real action and substance in achieving the ABSF priorities is important, rather than using the framework to claim that ‘all is well’ with the industry. There was also concern about the community’s general lack of awareness of the ABSF. However, some felt the framework influences sustainability awareness of key community leaders who in turn influence their constituents or interest groups. Finally, some participants recognised that trust is a complex concept and understanding the complexities of trust within the industry is important for addressing trust in a nuanced way.

Insights for future adaptation and improvement of the ABSF

Our research highlights the complex challenge of balancing diverse external and internal expectations around the industry's sustainability efforts. Based on the findings, we recommend transparent evaluation processes are developed to guide the ongoing adaptation and development of the ABSF. This is important to build internal and external confidence and trust in the framework’s ability to drive performance and practice change, as well as monitor the industry's responsiveness to changing community expectations.

It is recommended ongoing evaluations of the ABSF are conducted regularly by an independent group external to the industry and incorporate internal and external stakeholder views in a way that enables internal stakeholders to reflect on and suggest improvements to the framework. This balance is essential for demonstrating responsiveness to external interests whilst maintaining traction, legitimacy and relevance to those within the industry. This may simultaneously address several communications issues. The scope of such evaluation should include regular benchmarking against a range of international and national sustainability practices, frameworks and policies. Although the ABSF has informally incorporated some benchmarking, in future it should be more transparent and explicit.

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1 Background

The beef industry was worth \$12 billion in 2017/18 (ABS) with over 200,000 people employed in livestock industries alone and flow-on community benefits. Over 50% of the Australian landscape is used for livestock grazing (ABARES, 2016), making livestock industry practices critical to the stewardship of land and water and for the protection of natural and cultural heritage. However, Australian agricultural industries are the focus of increasing public scrutiny as values relating to product attributes of flavour, quality and affordability are surpassed by broader social, ethical and environmental values (e.g. Malek *et al.* 2019). The impact of livestock on environment and human health has received significant global attention (Steinfeld *et al.*, 2006; Willett *et al.*, 2019). This is reflected in media interest and community concern for issues such as live exports, underpaid overseas workers, land clearing in Queensland and risks to the Great Barrier Reef from land use practices.

These issues, as they are portrayed in the media, can damage industry reputation and lead to reactive policy and political decisions with economic, social and environmental impacts for individual operators (eg. Commonwealth of Australia 2011). Without an acceptable level of trust in livestock industries, market access is at risk (both domestically and internationally), with flow on effects for the economy, employment and land stewardship. Therefore, meeting and exceeding consumer, community and regulatory expectations across all dimensions of sustainability is now, more than ever, critical for agricultural industries.

Australian livestock industries have a long history of adapting to complex changes in market conditions, fluctuating commodity prices, highly variable climatic conditions, and dealing with a range of stochastic food safety and biosecurity events. However, changing social expectations have highlighted the need for the industry to be able to adapt to an expanding range of community concerns that can be considered broadly under the umbrella of sustainability.

Responses to the sustainability challenge have varied across industries as illustrated by a range of best practice policies and sustainability frameworks. For example, the cotton, dairy, rice, pork and sugarcane industries have all developed some form of sustainability or environmental reporting framework in the last decade. There is also variability within single industries. Individual enterprises ranging from large corporate producers of beef cattle and processors through to small-to-medium enterprises have also developed their own best practice or sustainability policies to report to consumers and the public more generally.

Indeed, there has been significant activity in sustainability monitoring and reporting in the past decade (de Souza *et al.* 2017). For the Australian beef industry, this activity has coincided with international efforts and the development of a range of global responses to sustainability challenges. Most notable of these is the [Global Roundtable for Sustainable Beef](#) development (GRSB 2017a) with concurrent activities in several other countries including the [US](#), [Canada](#), [Europe](#), and [Brazil](#).

In 2017, the Australian beef industry worked with a range of internal and external stakeholders to develop The Australian Beef Sustainability Framework (ABSF). This framework was explicitly developed to address these changing community and consumer expectations related to the sustainability practices of the industry. It is widely recognised that addressing and adapting to these changing expectations is essential to the ongoing improvement and acceptability of practices within the industry.

The 2018 ABSF purpose is to:

- Direct industry investment for continuous improvement in areas most important to our customers and other stakeholders
- Help protect and grow access to investment and finance by providing evidence of performance and a clear path to continuous improvement
- Foster constructive relationships with stakeholders to work collaboratively on continuous improvement
- Promote our industry to the community and customers.

Four broad themes of sustainability were developed in consultation with a range of stakeholders and included monitoring and reporting mechanisms. These themes include the following 10 priority areas:

Animal Welfare

1. Enhance animal wellbeing
2. Promote animal health

Economic Resilience

3. Enhance profitability and productivity
4. Optimise market access

Environmental Stewardship

5. Improve land management practices
6. Mitigate and manage climate change
7. Minimise waste

People and community

8. Produce nutritious and safe food
9. Build workforce capacity
10. Ensure health, safety and wellbeing of people in the industry

Each priority area has subordinate areas with their own sets of indicators and metrics that continue to evolve (for details see the [2019 Annual Update](#)).

The development of a sustainability framework is not an end in itself, but the beginning of an ongoing process of continuous improvement - not only in practices across the industry, but in how the sustainability framework can best support adaptation and communication.

1.1 Project aims and research questions

This project, conducted by The University of Queensland, seeks to evaluate the progress and challenges of adopting the ABSF using rigorous qualitative and quantitative research techniques. The project was jointly funded by The University of Queensland, Meat and Livestock Australia and CSIRO.

By providing an early and independent evaluation of the ABSF, this project aims to inform the Australian beef industry on how it should further adapt and enhance its sustainability framework and associated efforts. We draw on the experience and expertise of 40 key stakeholders within and external to the Australia beef industry to assess industry performance and the conduciveness of the policy and regulatory environment in relation to the ten priority areas identified in the ABSF. We further evaluate the importance of these priority areas for community acceptance of the industry. Importantly, this research also evaluates progress, trust and confidence in the recently developed

Australian Beef Sustainability Framework, which was designed to ‘meet the changing expectations of customers and stakeholders and ensure continued trust and market access for Australian beef’.

Specifically, this project aims to evaluate:

- The successes and challenges of the Australian Beef Sustainability Framework (ABSF) launched in 2017,
- The process used to develop the ABSF, and
- The effectiveness of the ABSF as a trust building mechanism.

In addition, this evaluation of the ABSF will inform future evaluations of sustainability efforts for Australian livestock industries.

2 Methods

This research followed a mixed methods approach, drawing on 40 semi-structured, in-depth interviews and short surveys with key internal and external industry stakeholders.

2.1 Participant recruitment

Participants for this research were selected based on the following eligibility criteria:

- Engaged in a professional or non-professional (but formal) role within industry, government or NGOs that have direct links to, or interests in, beef industry performance
- Have a minimum of 5 years' experience in the current role or other relevant roles (as indicated above),
- Be capable of discussing their professional opinions in an open, honest and constructive manner.

Numerous lines of contact were used to invite participation, including:

- Snowballing – the project team and the already established professional networks allowed us to make contact with key internal and external industry stakeholders
- Organisations listed publicly that met the criteria above were contacted to ensure we had multiple 'entry points' to stakeholders to avoid bias or capture of particular networks. This method allowed us to capture industry stakeholders not explicitly engaged in, or aware of, the Australian Beef Sustainability Framework.

Participants were recruited from all mainland states and territories except Tasmania. All potential participants were sent a brief description of the project at the time of initial contact. This outlined key project details and highlighted that participation was voluntary. A participant consent form was also sent, outlining the key agreements and ethical considerations associated with participation. Participants were given time to consider whether they wished to participate as the initial recruitment contact was made electronically. Recruitment and data collection adhered to all guidelines of The University of Queensland's ethical approval (approval number 2018002235).

2.2 Survey and interview design and analysis

Participants completed a brief 10-minute survey prior to the interview. The survey encouraged participants to reflect on the aspirations and priority areas of the ABSF prior to the interview.

The survey asked participants to rate (using a 5 point Likert scale, where 1 = strongly disagree, 3 = neutral, 5 = strongly agree) each of the ABSF's priority areas in relation to their importance, the influence of industry practices, internal industry governance, trade, government regulations, and policy settings, and how well the industry was communicating its sustainability progress. To keep the survey and interview to approximately one hour, and to avoid overload, we only evaluated the ten broad priority areas outlined in section 1.

The survey also asked participants to rate (using a 5-point Likert scale with 1 = very poorly, 3 = neutral, 5 = very well) how well the ABSF is performing against each of its four aims. For this research the aims were taken verbatim from the first ABSF annual report released in 2018 (ABSF, 2018, p. 2).

The framework is used to:

- *Direct industry investment for continuous improvement in areas most important to customers and other stakeholders.*
- *Help protect and grow access to investment and finance by clearly demonstrating continuous improvement.*
- *Foster constructive relationships with stakeholders to work collaboratively on continuous improvement.*
- *Promote the industry to the community and customers.*

Interviews were held in person in a professional setting (n = 22) or via Zoom (n = 15), Skype (n = 1) or phone (n = 3). Interview duration was on average 49 minutes, ranging from 24 minutes to 1 hour and 17 minutes. Interviews were transcribed using automatic QSR's N-Vivo transcription services, as well as manually where required. All transcripts were then rigorously checked for errors and accuracy.

All participants were asked if they wished to review their transcript before analysis. Transcripts were sent to all participants who wished to personally review them, and any minor changes related to accuracy and intended meaning were incorporated before analysis. Transcripts were also sent to participants for review in cases where sections of the audio were inaudible.

The first round of coding involved analysis of a selection of interview transcripts from 6 individuals representing a diverse set of stakeholder groups and interests. Out of this first round of coding emerged version 1 of the coding framework. This coding framework was then applied to the rest of the interviews. The coding framework evolved to incorporate the content of each new transcript. All qualitative analyses and coding were undertaken using N-Vivo Pro (version 12.6).

In reporting the findings, we avoid using direct quotations or any material that could potentially identify individuals to ensure confidentiality and anonymity, in keeping with the University's requirements for ethical conduct of research involving humans. We use paraphrased quotations to give an authentic sense to responses where appropriate. Similarly, we do not report the specific roles of participants, as recruitment was designed to capture diverse perspectives within the beef industry and to include all aspects of supply chains, governance and leadership roles as well as external perspectives.

2.3 Participant sample

Of the 40 participants interviewed, just over half were aware of and actively engaged with the ABSF (Table 1). This reflects the diversity of interests in the Australian beef industry among participants. Of note, many participants reported having multiple roles within and associated with the beef industry throughout their professional careers and/or personal backgrounds.

Table 1. Participant awareness and engagement with the ABSF.

Awareness and engagement with the ABSF	Number of participants
Aware and actively engaged	22
Aware and limited personal engagement	12
Little to no awareness and engagement	6

Table 2 shows the diversity of stakeholders included in this study. Note that the total is greater than the actual number of interviewees as nine participants belonged to more than one group. For example, a participant may represent an industry peak body and be a small to medium-large scale producer.

Table 2. Stakeholders participating in the study.

Internal/external classification*	Stakeholder group/label	Number *
Internal (n=28)	Producers (Small to medium-large scale)	8
	Producers (Large corporate)	2
	Producers ('Alternative' small-scale)	1
	Producers (Independent farmer lead alliance)	2
	Industry peak bodies (feedlots, livestock and property agents, processing, and transport)	7
	Industry coordinating body	1
	Live export	1
	Transport	1
	Wholesale	1
	Processing	1
	Independent butcher	1
	Industry Research, Development & Extension	1
	Beef industry sustainability professional	1
External (n=15)	Government (Research)	2
	Not for Profit (NFP) (Animal health and Animal protection)	2
	Natural Resource Management (NRM)	2
	Government (State and Federal)	2
	Non-Government Organisation (NGO) (Animal Welfare and Environment)	2
	Regulator	1
	Research/Government	1
	Finance	1
	Strategic communications advisor	1
Supply chain specialist	1	
Internal/External* (n=6)	Retail	4
	Agribusiness consultant	2
Total		49

*It was difficult to define the internal/external as a dichotomy or as a single stakeholder group, as several people had former and current roles in both and could speak from both perspectives.

Based on responses to questions about sustainability challenges and the level of sustainability for the industry currently, we classified participants broadly on their sustainability orientation. To do this, we adapted the model of Quinn and Rohrbaugh (1983) and Jones *et al.* (2005) to conceptualise whether participants had an external or internal orientation (the X axis in Fig. 1) and if they prefer control and stability rather than flexibility (the Y axis). The participants' 'orientation' reflects their scope of view when responding to questions about sustainability and the beef industry.

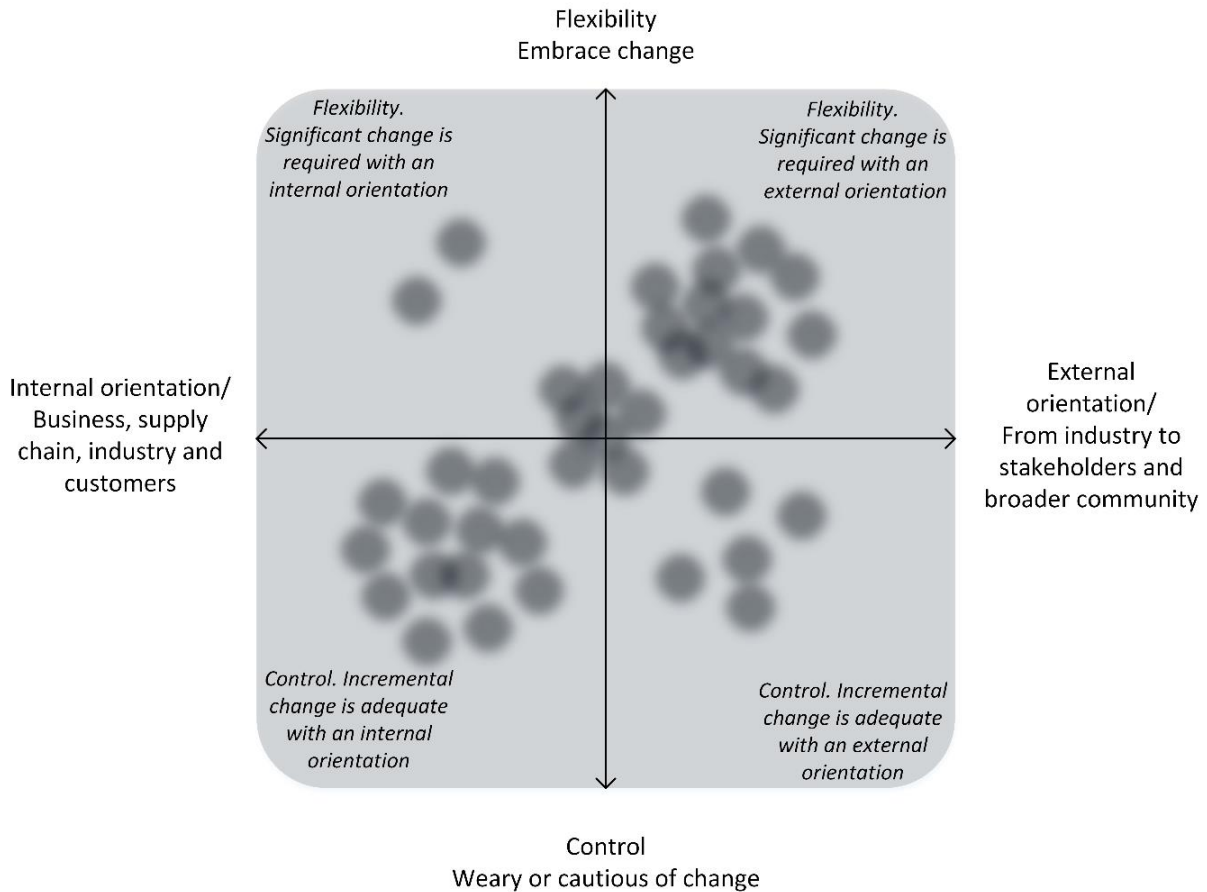


Fig. 1. Representation of the sustainability orientation of participants. Note: each dot is a subjective representation based on responses to the interview questions.

The figure illustrates the breadth of orientations captured in our participant sample and allows us to be confident that the selected participants capture a diversity of perspectives. In particular, it shows we engaged a wide range of participants whose interests in the beef industry varied from sustainability within the context of the supply chain, workforce capacity and financial viability to broader ethical concerns about animals, people, and the environment. This is indicated by the X axis of Fig. 1 above. It should not be interpreted as any form of judgement or preference for a specific orientation of individual participants.

3 Results

We present the results in two main sections. First the quantitative survey findings on the ten main priority areas for the ABSF. Second, the key themes within the qualitative interview data.

3.1 Survey ratings of priority areas

Participants' rated the industry's performance in relation to the 10 main priority areas of the ABSF, as well as how important each priority is to industry and community acceptance. The series of graphs in this section show the average (mean) and variability (standard deviation) of responses.

As these graphs show, almost all participants either agreed or strongly agreed that the ABSF priority areas relating to animal welfare, economic resilience, environmental stewardship theme and people and the community were *important* for the industry. In comparison to the other priority areas, there was more variability in views about the importance of minimising waste (see Fig. 8).

In contrast, to the importance of these priority areas, the industry's performance and communication of progress in achieving these priority areas was rated more moderately. In relation to industry practices, participants gave comparatively lower ratings to industry practices in relation to two Environmental Stewardship priorities (improvements in land management, and mitigation and management of climate change) and two People and Community themes (building workforce capacity and ensuring health, safety and wellbeing of people in the industry). Of all the priority areas, participants rated most highly the industry's practices in producing nutritious and safe food.

Internal industry governance, as well as trade, regulatory and policy settings were rated particularly low for each of the environmental stewardship priorities, as well as for enhancing profitability and productivity of the industry, building workforce capacity and ensuring health, safety and wellbeing. Communication of the industry's progress in achieving the priorities was rated low for almost all priority areas with the exception of producing nutritious and safe food.

In the following sections we discuss the ratings for each priority theme in turn.

3.1.1 Animal welfare theme

Animal welfare was rated consistently high in importance. Yet communication of the industry's progress in promoting and enhancing animal health and wellbeing was seen as requiring improvement. Several participants reported there is scope to improve industry practices, governance as well as the external regulatory, trade and policy environment so that it better enhances animal wellbeing and health.

Animal wellbeing

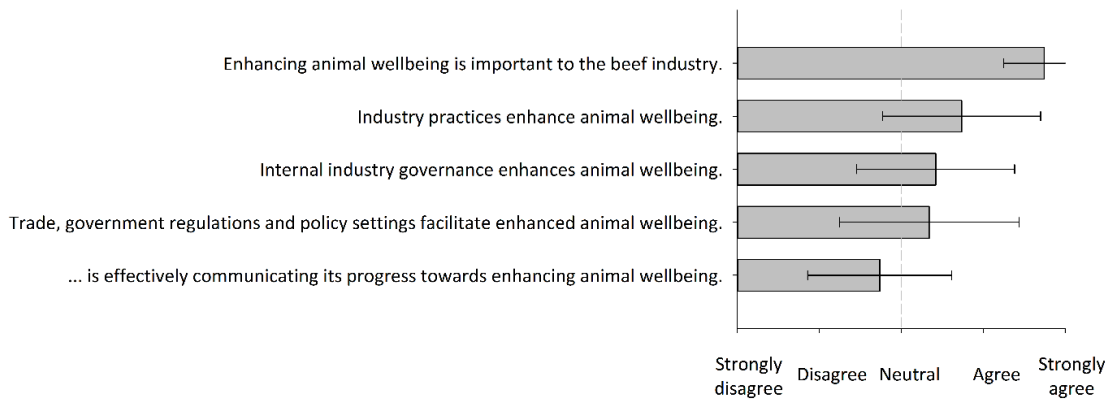


Fig. 2. Mean of responses for the priority area Animal wellbeing.

Animal health

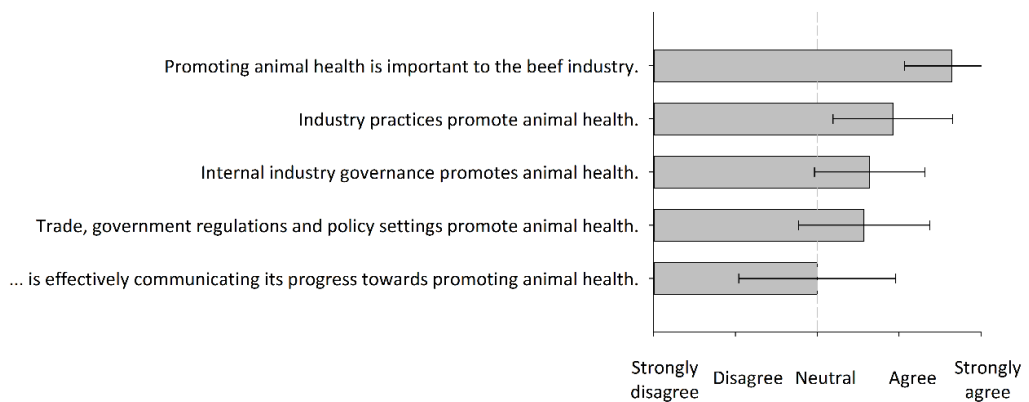


Fig. 3. Mean of responses for the priority area Animal health.

3.1.2 Economic resilience theme

Participants consistently rated economic resilience of the industry as highly important. This is not surprising given the important role of financial and economic viability for individuals and businesses within the industry. Communicating progress on market optimisation was one of the few priority areas that scored above neutral on average. Internal industry governance and the external environment is seen as requiring considerable improvement for many of the participants.

Enhancing profitability and productivity

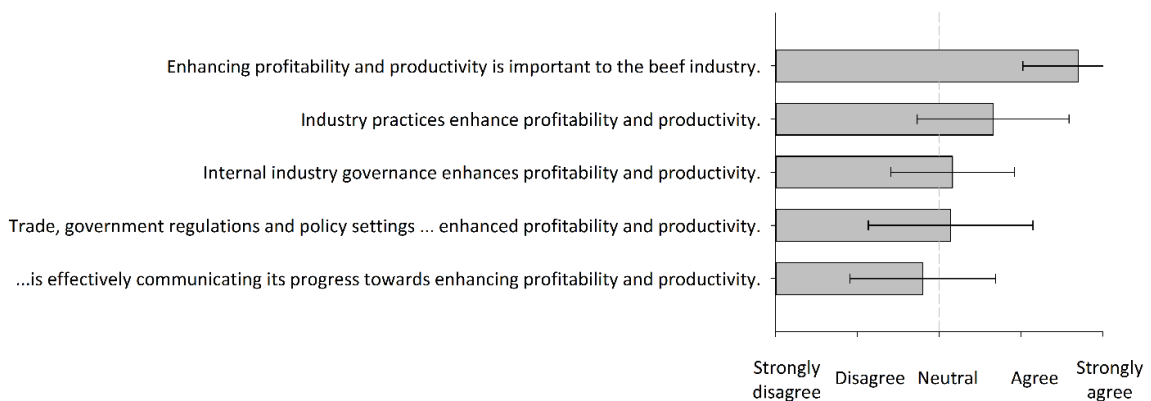


Fig. 4. Mean of responses for the priority area Enhancing profitability and productivity.

Optimising market access



Fig. 5. Mean of responses for the priority area Optimising market access.

3.1.3 Environmental Stewardship theme

Although environmental stewardship priorities were rated as high in importance, participants indicated there is considerable room for improvement across the board in terms of the industry’s environmental performance. Communicating progress in each of the environmental priority areas was rated very poorly.

Improving land management



Fig. 6. Mean of responses for the priority area Improving land management.

Mitigating and managing climate change

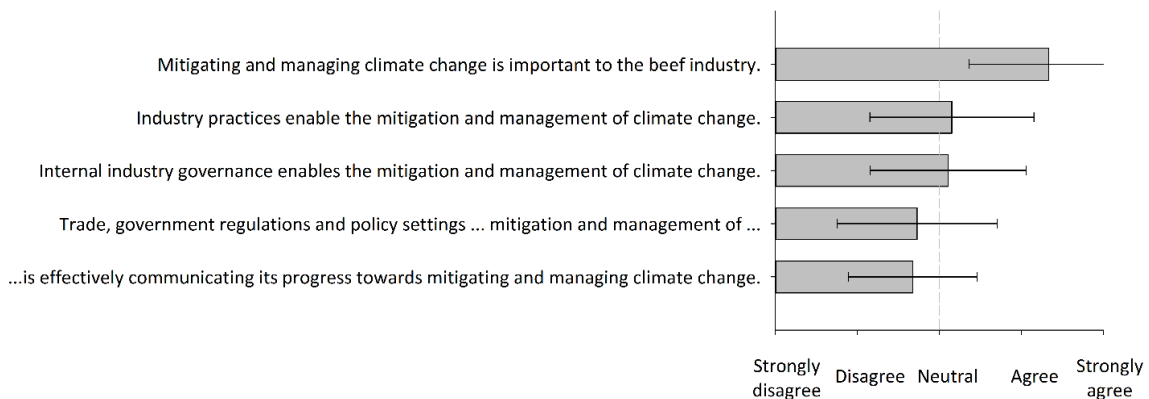


Fig. 7. Mean of responses for the priority area Mitigating and managing climate change.

Minimising waste

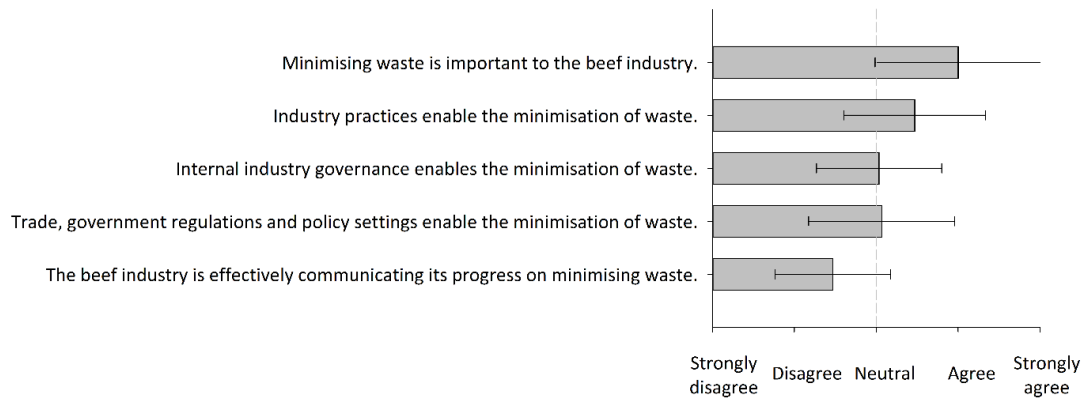


Fig. 8. Mean of responses for the priority area minimising waste.

3.1.4 People and the community theme

For the theme of people and the community, producing nutritious and safe food was considered to be the best area of performance out of all priority areas. The qualitative component of the research indicates this is the fundamental core business for the industry, and always has been. Industry practice and internal governance as well as the regulatory environment has adapted and evolved over a long period to ensure quality and safety. Building workforce capacity requires improvement. Although Health, safety and wellbeing rated very highly in terms of importance, there is some acknowledgement that industry practices need to improve in this area. In contrast to the ratings for most other priority areas, the regulatory and policy settings scored slightly above industry practice for this priority area.

Producing nutritious and safe food

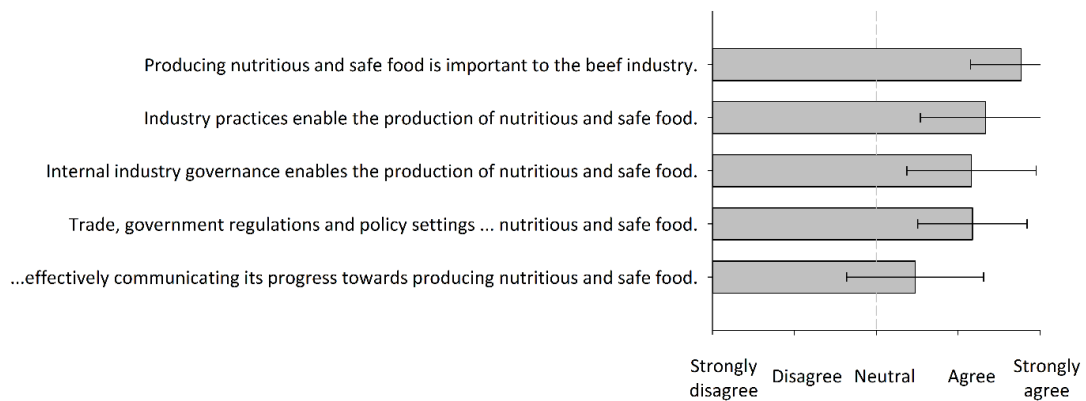


Fig. 9. Mean of responses for the priority area Producing nutritious and safe food.

Building workforce capacity

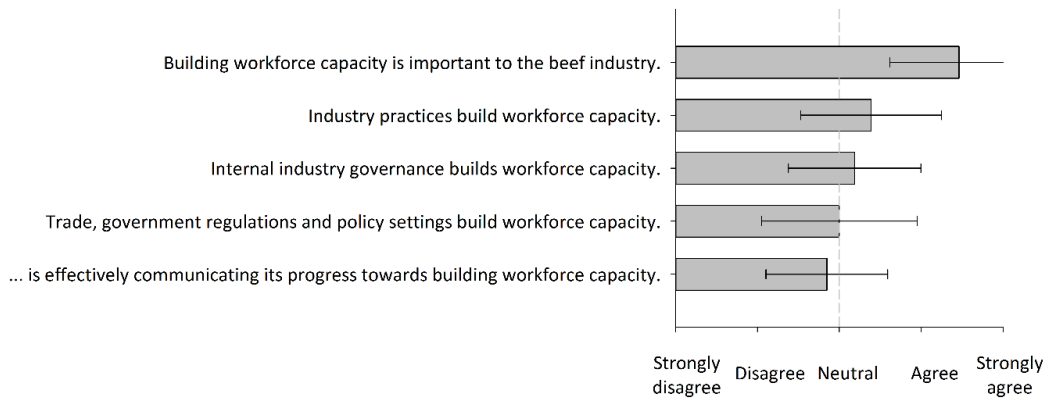


Fig. 10. Mean of responses for the priority area Building workforce capacity ratings

Ensuring health, safety and wellbeing

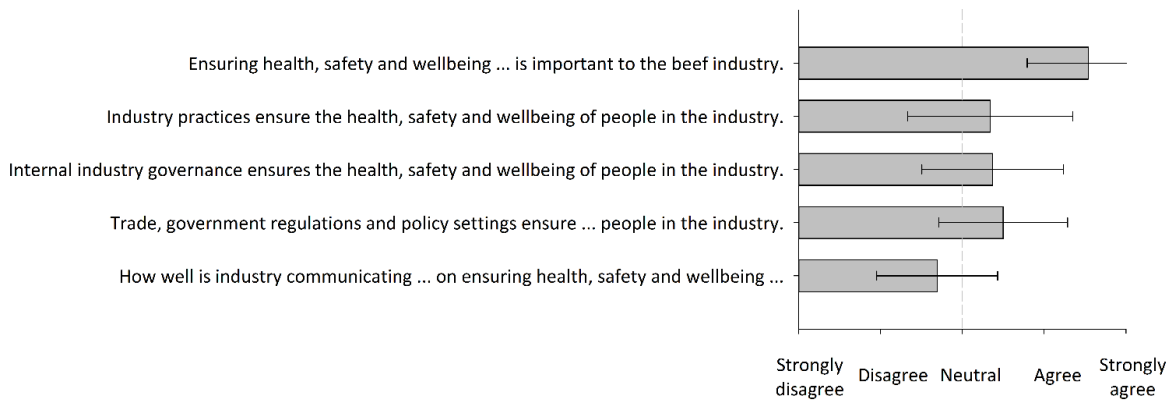


Fig. 11. Mean of responses for the priority area Health safety and wellbeing ratings

3.2 Sustainability and the Australian beef industry

This section reports on a variety of sub-themes broadly related to sustainability and the beef industry as a whole. Themes related to specifically to the ABSF are covered in section 3.5. Figure 12 below provides an overview of the major themes covered in the results section.

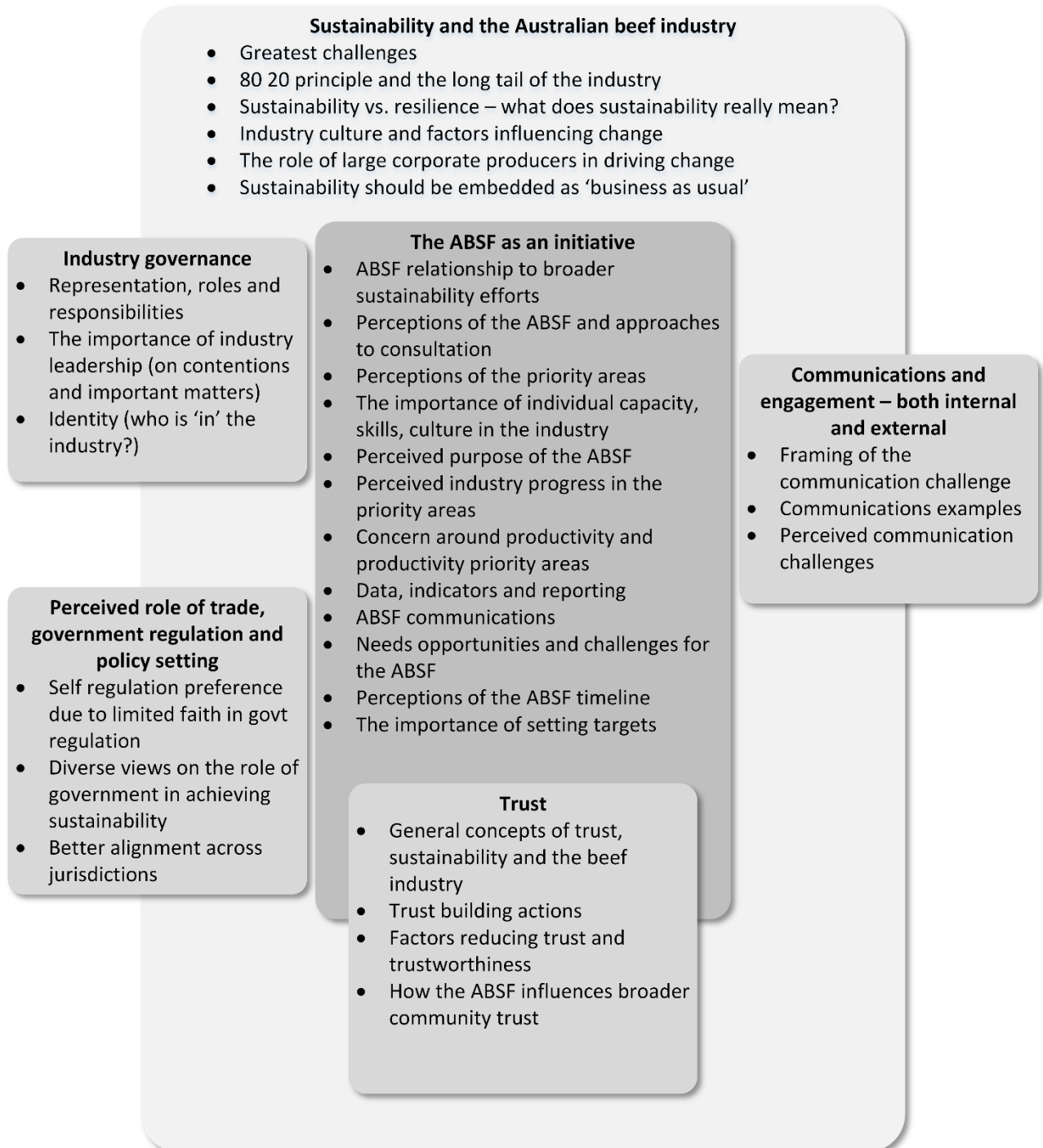


Fig. 12. Conceptual overview of the major themes emerging from the interviews indicating the overlapping nature of themes relating to sustainability of the beef industry generally and issues specific to the ABSF.

Although most expressed the need to be proactive, some believed that industry has, and continues to demonstrate sustainability, purely through the longevity of its existence in Australia. Those holding this view tended to align with the bottom left quadrant of Fig. 1 in terms of their sustainability orientation, with a preference for an incremental approach to adaptation for the industry.

3.2.2 80-20 principle and how to address the long tail of industry performance

In recognising that the industry is large and diverse with many supply chains and thousands of producers, a common concept discussed is the “80-20 principle” or the ‘bell curve’ of performance. The general view was that about 20% of individual businesses are leaders in best practice and 80% have room for improvement. This variability was reported to have significant implications for how to get the industry as a whole moving towards sustainability. Two participants raised this issue in terms of a ‘long tail’, especially at the producer level, and how to start having those discussions in a nuanced and inclusive manner, with all parties involved. This is discussed in section 3.3.2.

3.2.3 Sustainability vs resilience – what does sustainability really mean?

Many participants questioned what the word ‘sustainability’ meant, and some acknowledged the diversity of interpretations. Some were sceptical, believing the term carried ‘baggage’ and contained assumptions relating to climate change. In part, this also reflects a view that variability, particularly in climate, has always been a key feature of the industry, expressed as cycles of ‘boom and bust’, ‘feast or famine’, ‘drought or flood’. The inherently cyclical nature of the industry raised questions about sustainability and the role of resilience. There was a perception that the beef industry was extremely resilient and has always made it through hard times. This resilience is seen as the core to sustainability with the belief that they will continue to operate into the future even with increasing climate variability and other fluctuations. There was a sense that the industry has no choice but to adapt to changing climatic, economic and environmental conditions, and has the resilience to do so.

3.2.4 Industry culture and factors influencing change

A few participants from within the beef industry emphasised the need to move beyond minimum standards and towards ideals of best practice within the industry. However, there are many barriers to this change and much work needs to be done to reach these ideals. Several of these barriers and enablers are expanded on in following table.

Other factors influencing change included an ‘us vs. them’ view, mandatory standards (regulation), an unclear pathway to change, and industry and government collaboration. For example, it was noted that while it’s an undesirable option to some, moving towards mandatory standards for animal welfare would help to drive change. Another example is the desire to reduce emissions and the difficulty in knowing what technologies and opportunities are available, which limits the ability to change. There was also a view that, if negotiated and designed well, then industry and government collaboration can be a positive force for change.

Table 3. Factors influencing change towards sustainability

Factor	Enables change/ limits change	Explanation
Economics and the bottom line	Has the potential to enable or limit change	In some cases, the immediate or short-term financial pressures of running a business (e.g. fixing a fence, generating cash flow) can get in the way of planning for and implementing longer term sustainable practice change, particularly at a producer level. Furthermore, in some cases it is believed that, 'I can't be sustainable if I'm not profitable'. On the other hand, some producers may recognise the importance of a healthy natural resource base for profitability and choose to invest in practice change in order to be more profitable in the long-term.
Industry acceptance and understanding of issues	Enables change	When individuals, businesses, and sectors of the industry accept, acknowledge, and have a thorough understanding of sustainability issues, the industry is more likely to be successful in achieving sustainability outcomes.
Industry leadership	Has the potential to enable or limit change	Strong and effective industry leadership was considered an important factor in driving change. Some suggestions for who should assume this leadership role include (but are not limited to) RMAC and large corporate producers. These industry leaders should act as champions for sustainable change and uphold standards of best practice through their internal and external communications and engagement. The importance of industry leaders having a clear position on sustainability issues and not be afraid to 'call out' bad practice (e.g. illegal land clearing and animal welfare breaches) was raised.
The influence of climate change beliefs	Has the potential to enable or limit change	The beef industry's goal to be carbon neutral by 2030 requires all sectors of the industry to have a shared understanding and willingness to do what it takes to achieve this ambitious target. It was noted that a lack of shared belief in anthropogenic climate change may hinder the industry's ability to meet this target.
Education, extension, and research translation	Enables change	Many noted that currently the adoption, uptake, and adaption based on best practice research is low due to the lack of government-funded extension officers. Many agreed that increased employee training, education, extension, and research translation activities would accelerate and enable change.
Productivity	Has the potential to enable or limit change	There were polarised views on whether productivity was conducive to creating sustainable change for the industry. It was argued that productivity is essential for industry sustainability if they want to continue to be economically viable. On the other hand, it was also suggested that the industry's focus on productivism over the past 200 years has led to a depleted natural resource base in some parts of Australia, and it was suggested that profitability is a better measure of economic viability.
Carrot and stick approaches	Enables change	The term 'carrot and stick' refers to a combination of reward and deterrents which are used as strategies to bring about a desired change. While the approach of 'wielding a big stick' (e.g. through regulations) is not a favorable approach, it was acknowledged that this is a powerful way of creating change. By contrast, there was support for the idea of government-incentives to encourage and support the industry to create change.

In relation to encouraging industry-wide change, the distinction was made between individual operators within the industry, and the industry as a whole - with the view that change comes from the parts, not the whole. It was suggested that in order to effectively build capacity for positive change within the industry, there must be a consideration and coordination of individual businesses themselves, and their beliefs, norms and practices with regards to sustainability.

There were also references to a culture which sees the industry as 'tough' and that people need to 'man up' and should not be 'wrapped in cotton wool'. This culture potentially negatively influences efforts to improve in areas such as health, safety and wellbeing. In addition, other participants suggested that a narrow focus on economic viability, as the main basis of sustainability, may under-value other dimensions.

Participants from within the supply chains believed that most producers want to do 'the right thing', but may suffer from 'path dependence', where they continue to do things because that is the way they have always been done.

3.2.5 The role of large corporate producers in driving change

The importance of industry leadership in driving positive change was frequently mentioned in interviews. Some discussed the heightened capacity and growing expectation for large corporate producers to play a leadership role, leading by example, championing sustainability as individual businesses, and being a public voice of positive change for the beef industry.

3.2.6 Sustainability should be embedded in 'business as usual'

Some participants felt that for some in the industry, sustainability is seen as something extra, or an add-on, or something that is imposed from external pressures and requirements, whether regulatory, or market driven. These participants expressed a position that sustainability needs to be embraced to the extent that it becomes 'business as usual', and not an add-on. Various forms of certification and independent verification were identified as possible mechanisms to embed sustainability in 'business as usual'. However, it was noted that this is not the role of the ABSF. In addition to this it was suggested that consumers may experience 'label fatigue' (see 3.6.3.1) with the addition of 'sustainable beef' product labelling.

3.3 Industry governance

This study was undertaken at a time when there was significant industry engagement around restructuring of the beef industry. This was reflected in views that the contemporary industry governance structures are overly complex with many bodies and sometimes competing agendas which potentially undermine sustainability efforts. This adds to confusion about where responsibilities lie in terms of sustainability.

Nearly half the participants expressed their lack of faith in the role of internal industry governance to enable outcomes towards continuous improvement. Some internal stakeholders were confused about the ways in which industry governance relates to outcomes on the ground. This was due to a view that individual businesses have autonomy around their decision-making, therefore leaving industry governance with very little power to influence change within the supply chain. This view was not shared by all, with others believing that industry governance did play an important role in

influencing change indirectly through effective leadership, engagement, and research extension. There was a level of industry disquiet and disagreement regarding internal industry structures, which influences the industry's capacity to address sustainability effectively. An illustration of how this plays out in reality is discussed in the next section.

3.3.1 Representation, roles, and responsibilities

Within the context of the beef industry's internal industry governance, many in this study discussed what they believed to be appropriate roles and responsibilities, particularly with regards to communication. Overall, there was not a shared understanding about who the communication conduit should be for issues related to sustainability (e.g. RMAC, MLA), both internally and externally. However, some respondents did raise the need for an independent communication conduit. This was raised with the recognition that MLA and some state farming organisations are currently fulfilling this communication role informally for the industry, and some suggested that this should not be their role because it blurs a line between research facilitation and potential advocacy. One respondent made a comparison with the United States where an independent food body communicates to the public on research undertaken through relevant research and development organisations.

Many identified that the governance structure is confusing and that it can be difficult to come to consensus when there are so many industry bodies with differing agendas. It can be difficult to know who is representing who, and without a unified voice this can make communication difficult.

Some reflected on the dual role of governance and advocacy and the way this limits the industry peak bodies' ability to create change and influence outcomes. For example, one mentioned that since representative bodies are expected by their members to be advocates for their sector of the industry, this leaves them with a conflict of interest issue and reduces their ability to govern effectively. If State based organisations can only represent their constituent's views and concerns it may limit the rate of adaptation to external community or stakeholder interests. This also relates to a general lack of faith in the role of internal industry governance to enable outcomes towards sustainability. However, there was recognition from some that the peak industry bodies do understand the importance of promoting practice change towards sustainability, and that creating a culture of improvement in a large diverse industry is not an easy task.

3.3.2 Industry leadership developing a clear position and taking action on contentious matters

There was a lot of discussion about the 'long tail' of industry performance (see Section 3.2.2) and many questioned the role of the beef industry in addressing it. In this instance the use of the phrase 'the long tail' indicated a concern for a wide variety of practices across this very diverse industry. The long tail concept is like an innovation or technology adoption curve where a relatively small number at one end of the spectrum are highly adaptive and quickly respond to changing practices and expectations, with a large number in the middle. The 'long tail' however, indicates a reasonably large number of individuals or individual enterprises that for a range of reasons are not able to, or lack the capacity to, adapt to changing expectations. This raises the issues of whether a lack of responsiveness is influenced by a resistance to change or a fundamental inability to change due to financial or other resource or capacity issues.

There was discussion around how the industry should deal with those who for various reasons seem resistant to change. The suggested responses can be categorised into two approaches; calling out and calling in. The distinction between ‘calling out’ and ‘calling in’ requires some clarification as although they relate to helping improve practice across industry, they also highlight different approaches that could be used by the industry. The concept of ‘calling out’ was conveyed in a way that means that practices that it considered unacceptable to both the industry and the community ought to be highlighted in some way so that the broader community can see that these behaviours are unacceptable for the industry.

One person gave the example that, despite the industry having its own farm quality assurance program through Livestock Production Assurance (LPA), businesses are still able to operate even if they ‘break the law’. This has significant implications for trust, and many suggested that the industry should make public announcements to make clear their position on such matters. This is an example of where many in this study believed that industry trust and its authorising environment could be strengthened (see section 3.7 on Trust). ‘Calling out’ however, does raise issues around equity, procedural fairness, and capacity for individuals to change practices in a timeframe that is appropriate.

‘Calling in’ was also raised by some participants as a different strategy where perhaps individuals whose practices are not in keeping with expectations are engaged in a manner that is more supportive, mentoring, or where industry itself might provide the tools or the opportunities for practice change without the risk of ‘hanging them out to dry’.

Ultimately, it was clear that many in this study wanted the industry to uphold a clear position and standards around the kinds of activities that they do and do not support, and to take action to ensure these standards are diligently adhered to. There was, however, some uncertainty about who within the industry or which bodies would be best suited for such a role.

3.3.3 Industry identity – in or out

It is interesting to note that there was a couple of instances where people within the industry talked about themselves as not being part of the industry because they did not align with what they considered its dominant values. This was evident when some used the words ‘them’ and ‘they’ when discussing the industry, as opposed to the more common use of words such as ‘we’ and ‘us’. Some producers for example, may feel that because of the nature of their farming, their supply chain and niche customers that they are not well represented, nor part of a larger industry. For these smaller or niche players they may feel some resentment towards either industry structures or the requirement of paying a range of levies or fees to a broader industry that does not necessarily represent their values or interests. Whether or not people felt they were ‘in’ the industry also related to their position in the supply chain. This blurry boundary is also indicated in Table 2.

3.4 The role of trade, government regulations, and policy settings in achieving sustainability outcomes

This section reports on comments made about the role or nature of trade, government regulations, and policy settings within the context of the ABSF, and the industry’s sustainability activities more broadly.

It is important to note that some in this study had different qualitative responses for each component of this survey question (see Section 3.1), making the distinction between trade, government regulations, and policy settings as distinct and differing concepts in relation to the priority areas of the ABSF. For the purposes of the quantitative survey the three concepts were placed together to indicate external drivers affecting the industry's performance. The interview allowed more nuanced exploration of these external factors.

3.4.1 Preference for self-regulation and general lack of faith in the role of regulations in achieving outcomes

There was an overall preference for self-regulation from most stakeholders within the supply chain for sustainability outcomes. As part of this preference, some discussed the concept of over-regulation and indicated frustration around 'red tape' and 'green tape' due to the bureaucratic and financial pressures that regulations place on beef businesses. In fact, some within the industry thought of regulations as a key factor preventing them from running a sustainable enterprise, particularly in the context of land management.

In contrast, most external and some internal stakeholders tended to be in favour of government regulations as an effective and necessary mechanism to create change towards sustainability. There were comments that government has a stronger impact than internal industry governance. However, this comment needs to be considered within the context of the overall preference for self-regulation from most people in the industry. For example, there was support for the idea that government should only intervene when there is market failure.

Overall though, there was a general lack of faith in the role of regulations and government to enable outcomes towards continuous improvement. Many within the industry questioned the effectiveness of regulations for several reasons. One key reason for this reduced effectiveness is the idea that laws are bare minimum when compared to best practice, and that the laws rarely enforce, enable, or facilitate true best practice on the ground. For example, one internal stakeholder indicated that legislation for animal welfare and animal building are only minimum standards and do not necessarily encourage or promote best practices.

3.4.2 Diverse range of views about the role of government in achieving sustainability outcomes

A diverse range of positive, negative, and neutral views were expressed about the role of government in supporting the achievement of sustainability outcomes. In general, it depended on the individual's personal worldview or interests in relation to the topic at hand. Some examples are detailed below.

Firstly, there was a lot of discussion around environmental policy. In particular, some questioned the government's role in land management, emissions mitigation, and climate adaptation. For example, land clearing legislation, particularly in Queensland, was regarded by many as being restrictive and hindering land management practices for various reasons including making 'things like managing woody weeds and invasive native species very challenging'. As part of this discussion, some highlighted the need for government to engage more with industry to negotiate land management policies in the future due to the fact that land management is not a 'one size fits all' issue, even within a specific region or jurisdiction.

People expressed a wide range of opinions about climate and emissions policy. Firstly, it was suggested that currently trade, government regulations, and policy settings in the emissions and climate space are lacking. The Emissions Reduction Fund (EMF) was acknowledged as a starting point, but it was criticised as being hard to access. There were also concerns about the EMF being a large administrative burden with low reward.

Secondly, the industry should expect to see a lot of change in policy settings around climate change and drought management in the agriculture space into the future. It was suggested that this is largely being driven by people external to the industry through the election process, not by the industry itself. There was acknowledgement that all levels of government are still trying to get their head around several issues related to climate policy including funding and measurement.

Many in this study acknowledged the immense complexity and challenge of addressing climate change in the beef industry and expressed that they would appreciate policy settings and financial/tax incentives that are easy to access, incentivise best practice, and have a low administrative burden. Importantly, it was mentioned that climate policy in the agriculture space should also be flexible to allow the beef industry to use a diverse range of mitigation and adaptation strategies.

Drought policies are acknowledged as a difficult and complex area for governments at all levels, and individual enterprises, as well as the industry as a whole to constantly improve on. The issue is vexed with the reality and difficulty of those struggling financially and socially with ongoing an extended drought conditions. This has been an ongoing issue since the beginning of beef cattle production in Australia. Some participants discussed the difficulty and often conflicting outcomes of drought policy such as 'rescue policy' which they see as stifling continuous and ongoing improvements for the industry. It is not uncommon to find some of the better performing and more viable enterprises uncomfortable with the level of support received by those who they may at times consider unviable or lacking capacity to become more resilient in times of drought. Balancing humanitarian care with ongoing sustainability in the context of extended and widespread drought requires attention from the industry. If industry is seen to be addressing this proactively and sensitively it may build public confidence. One of the key challenges however is working with those in the industry who continue to struggle in drought conditions.

Finally, as a positive and uncontested example, most people in this study regarded Australia's food safety systems to be robust and effective. As a result, Australia's food safety reputation is also highly regarded. Given the widespread recognition of this success within the industry; it was suggested that the industry could reflect on the lessons learned from Australia's food safety systems, and how those lessons can be applied in other areas.

3.4.3 Better alignment of policy across jurisdictions, between domestic and export markets, and with the ABSF

There was discussion about jurisdiction issues and the inconsistency between domestic and export regulations in abattoirs and the need to better align sustainability-related policy across states and levels of government. There was also the suggestion that trade, government regulations and policy settings should more closely align with the vision, targets, and indicators set out in the ABSF. Harmonising these with consumer expectations is also important. Overall, there was agreement from most that the Australian beef industry and the various levels of government do share a similar

vision for the future of the beef industry, but the potential approaches to that might not be shared. Industry and government should work together to achieve better alignment and consistency across jurisdictions, domestic and export markets, and with the ABSF itself.

3.5 The ABSF initiative

The overall attitude towards or sense of the ABSF was very positive. However, there were a range of issues, challenges and opportunities for improvement highlighted by the participants. These are discussed in the following sections. It was more likely for people to have an overall positive view of the ABSF if they had been actively engaged or involved in the ABSF. There was very positive feedback about the ABSF Secretariat specifically; with comments that she ‘hasn’t taken any shortcuts’, ‘really listens’, and engaged a diversity of people both internally and externally. While this feedback on excellent individual effort does demonstrate how vital it is for building rapport and trust, it does emphasise the importance of ongoing succession planning and capacity building for those managing the framework. Many voiced that while the ABSF is still evolving and needs to accelerate, it is still quite a proactive approach. It was widely acknowledged that the ABSF is still in its early days and therefore, the measurable impact of it has been minimal because of this.

3.5.1 The ABSF’s relationship to broader sustainability activities

The ABSF is an initiative operating within the context of broader sustainability activities at an individual business level, an industry level, as well as nationally and internationally. Not all these activities are aligned with or captured by the ABSF. For example, it was noted that there are sustainability-related activities undertaken in northern Australia by beef producers who have never heard of the ABSF. In addition, many of the large beef enterprises have developed their own versions of a sustainability framework. The extent to which they are aligned with the ABSF varies. It is considered important not to ‘re-invent the wheel’, but these various frameworks should at least be compatible with the ABSF, and must be applicable to their individual situation, including their markets and stakeholders.

On a global scale, the Global Roundtable for Sustainable Beef is a multi-stakeholder initiative which was ‘...developed to advance continuous improvement in sustainability of the global beef value chain through leadership, science and multi-stakeholder engagement and collaboration. The GRSB envisions a world in which all aspects of the beef value chain are environmentally sound, socially responsible and economically viable’ (GRSB, 2017b). Many of Australia’s beef businesses, peak bodies, and R&D organisations such as MLA and Cattle Council are members of the GRSB’s constituency membership groups.

There was a range of opinions about the relationship between the ABSF and GRSB. Some people referred to the ABSF as the ‘Australian Roundtable’ in the interview, assuming that the framework was among the local, national or regional multi-stakeholder initiatives around the world (e.g. United States Roundtable for Sustainable Beef) who share the vision, mission, and statement of purpose and objectives of the GRSB. Others took a more critical view, as explained in section 3.5.2.

3.5.2 Perceptions of the ABSF’s approach to consultation

People who were more critical of the ABSF suggested that the ABSF has taken a ‘square-table’ rather than a roundtable approach - meaning that it is not consultative enough. There was concern that the

ABSF is not engaging a diverse enough range of voices such as first nations people, people with interests in animal welfare (beyond RSPCA), as well as the processing, transport, and live export sectors of the Australian beef industry. In contrast there was also comments that the ABSF is too consultative and that some of the discussions were not as constructive as they could have been because of some of the more 'extreme' voices in the room.

This reflects the complexity and difficulty of getting engagement and participation right, on something as complex as a sustainability framework. On the one hand casting a broad and open net to engage even opposing values sets has many advantages but at the same time can disenfranchise other stakeholders, particularly those within the industry. Conversely, if the breadth of stakeholders is too narrow the risk is challenges and opportunities are not adequately identified or may not align with diverse community and stakeholder expectations.

3.5.3 Perceptions of the ABSF priority areas

The ABSF has 10 priority areas, as listed in section 1. There was commentary around the importance of the priority areas and whether the priority areas selected by the ABSF team were appropriate and suitable going forth. Overall, there was a sense that these are the right priority areas. However, the ABSF will need to stay adaptable to changing expectations, trends, and requirements and adjust its priority areas accordingly.

In addition, there are some priority areas that may have already been achieved. For example, due to the beef industry's history in dealing with disease outbreaks in the past, the beef industry now has a very robust food safety system and a reputation around that which enables them to access a variety of markets. Therefore, food safety requires less attention when compared to other priorities. Some additional commentary around the priority areas is covered in 3.5.4 to 3.5.8.

3.5.4 The importance of individual capacity, skills, and culture in the industry

The most important priorities or non-negotiables for many participants were related to the people in the industry. It was discussed that the health, safety, wellbeing, skills, knowledge, and culture of the people in the industry is both the greatest strength and potential greatest weakness for all sustainability efforts and the ABSF. This view emphasised the importance of personal networks, individual capacity, training, mentoring and overall capacity building. Without the 'right people' with appropriate attitudes towards learning and adapting, sustainability efforts will not be effective.

The social aspects of the ABSF were highlighted as needing greater focus and awareness. One participant said that the indicators around wellbeing were not designated with adequate depth, nuance, and understanding. Aside from a few key interviews, the social aspects of sustainability for the beef industry were not discussed in depth during the interviews. The main issues that arose when talking about people were the cultural norms around the 'man up' attitude, that 'it's a tough industry', and people need to 'just get the job done'.

3.5.5 Perceived purpose of the ABSF

In the interviews people were asked to rate how well the ABSF was living up to its intended use, as specified in the 2018 annual report. People also spoke about the role of the ABSF of its stated purpose.

Regarding the framework's role in the space of investment and finance, many said that the ABSF does not 'direct', but rather it 'advises'. The framework does not direct investment because this is not its intended function. It should be noted that the stated aims did change to reflect this after 2018. There was also discussion that there is very little evidence of increased access to investment and finance. However, there were a couple of anecdotal examples where investment opportunities have opened as a result of the ABSF. There was consensus that the framework has effectively fostered constructive relationships with stakeholders. This was a strong point for the framework. However, there were a couple of exceptions. Some stakeholders from the transport, live export, and processing sectors mentioned that their segment of the supply chain was not included as well as they could have been, and that they would have appreciated the opportunity to contribute more.

Overall, there were positive comments about the stakeholder relationships and the way the process was navigated throughout the framework. People said that it is not easy to get a range of stakeholders in a room and come to a consensus, and the framework has done this well. Some even said the ABSF should be nominated for an award in stakeholder consultation.

Finally, regarding the fourth outcome, most participants said that the ABSF is not promoting the industry effectively yet. In time it will, but it is too early to have this kind of impact. People mentioned that further strategic planning and action is required to promote the ABSF and the industry to the broader community. This also led to a question around whose role it is to spread the word about the sustainability of the beef industry to the community and customers.

Some saw the whole purpose of the ABSF as a tool to tell their story more effectively. For many, the ABSF is a tool intended to develop a roadmap, measure progress against targets, and be a communication mechanism and tool for both the industry and externals.

3.5.6 Perceived industry progress in priority areas

As noted in section 3.1, participants perceived there was considerable scope for improvement in the industry's performance across all priority areas. There were several issues that were mostly perceived to be positive overall, without significant need for change. This included food safety, waste minimisation in the processing sector, and to a lesser extent animal health. Many commented that the industry is doing quite well in these areas because there is a strong economic imperative to do so. In addition, the large corporate beef producers were complimented for their focus on building workforce capacity and fostering the health, safety and wellbeing of individuals in the industry.

Most other sustainability issues were discussed as having room for improvement. It was highlighted that there is a high degree of variance across the supply chain, from one beef business to the next, with regards to implementation of best practice. Some key areas of focus for the industry in terms of improving best practice include livestock transport, usage of pain relief, low-stress stock handling, animal wellbeing in feedlots and saleyards, overgrazing, illegal land clearing, packaging waste, etc. Note that this list is illustrative, and not inclusive of all comments made in the interviews.

Many identified the role of employee training, skills and monitoring, as well as research, development and extension and broader industry engagement activities in supporting practice change throughout the industry. In addition, many noted that there are significant financial barriers to enabling practice change across all sectors of the industry, in the short, medium and long term. These include issues such as, but not limited to: high costs to operate in the processing sector (i.e.

labour and electricity) and immediate day-to-day concerns in the production sector (e.g. fixing a fence). This raised the need for government incentives in order to reduce these financial barriers and support practice change. There was overall recognition that practice has changed a lot throughout the beef industry's history in Australia, and there will always be room for improvement.

3.5.7 Concern around profitability and productivity priority area

One of the framework's priority areas under the theme of Economic resilience is to 'enhance profitability and productivity'. Someone identified that there was a considerable debate in developing this priority area and that the process included a lot of compromise. It was noted by a range of people in this study that there is a significant difference between profitability and productivity, and that it may not be helpful to 'lump them together'. It was also noted that a broader conceptualisation of economic resilience would be beneficial in order to make the ABSF more holistic. This may indicate a mismatch between the theme of Economic resilience and its priority areas that may not incorporate resilience directly.

Others believed that one would lead to the other because 'the more productive they are, the more profitable they are going to be'. This view was not shared by all.

3.5.8 Discussion around data, indicators and reporting

Data required for some indicators are problematic. For example, on indicators around industry profitability it is difficult to obtain evidence at the individual business/farm level for a number of reasons including many farmers understandably do not wish to disclose their profits. It is also important to consider data-scale and aggregation and the value of farm-level data/verification as an addition to industry-wide measures. It is difficult to generalise about profitability because profitability varies hugely among all beef businesses throughout the supply chain.

There was recognition that because the industry is still getting baseline statistics, the datasets are incomplete. Some viewed this in a negative light and others accepted that this is part of the journey. Overall, there was faith that the datasets will become more complete, accurate, and reliable with time. It was also recognised that it's sometimes difficult to get consensus around what indicators and measures are the most reliable evidence measures for monitoring progress, particularly for profitability and productivity. For example, there was reflection on whether the ABSF should look at a 3- or 5-year average, focus only on profitability pre-tax, or include capital appreciation.

There was a lot of discussion about how to best quantify 'sustainable beef' into the future. Some said that the ABSF lacks research depth and translation. As part of this, some questioned the most appropriate ways to undertake measurements so that the ABSF can report accurately on its designated indicators, in the simplest and most cost-effective way possible. This was particularly so for environmental measures.

There was some concern that the indicators are 'too rosy' and that the ABSF should endeavour to be honest and accurate in the way they communicate their performance. For example, one of the indicators within the 'animal husbandry techniques' priority area is the percentage of the national cattle herd with the poll gene. The ABSF was criticised for making this figure look 'rosier' than it is because the figure combines all northern and southern herd data, which creates the impression of more polled animals than there really is. Whereas the issue of horned and polled is primarily a focus

for northern Australia, so the focus should be on figures that region. When statistics are used like this, the inaccuracies may negatively affect some producers and may put their business in a compromised position because it is not accurate within their context. It is therefore important to be more honest and transparent with the figures that are communicated. Clearly there is a connection between the quality of the ABSF data and the ability for the industry to ‘tell their story’ adequately and transparently.

There was discussion around the idea of individual business and farm-level verification and that in order to build and maintain trust, the industry needs to consider endorsing verification schemes that are available for the community and consumers. This provides the independent evidence base that should ideally build community confidence in the sustainability story that the beef industry is trying to tell.

3.5.9 ABSF communications

This section is specific to communication of and for the ABSF. There were positive overall comments indicating that the intent, professionalism and the messaging is good. Broader communications messages are covered in section 3.6.

A summary of key comments related to ABSF communications are listed below:

- For some the language around priority areas is confusing and potentially misleading. For example, there are 6 priorities developed on an annual basis yet there are overall four broad themes with 10 original priority areas (with subcomponents). This may create an impression of selectively focusing on favourable areas to report on and for some it was considered that it would be better to tighten up precisely what it wants to achieve, and how it is going to achieve it.
- The ABSF has not reached the broader community and consumers, nor has it reached the broader industry beyond those directly involved in the consultative committees and the steering group. This indicates a need to engage more with both of these parties.
- The ABSF still lacks an ‘elevator pitch’ and although it is seen as a fantastic program, it is not easily communicated clearly to customers or even to people within the industry.
- There is some concern that internal communication of the value proposition of ABSF for some parts of the industry has not been adequate.
- Some topics/priority areas within the ABSF are more difficult to communicate than others. For example, profitability and climate change are some of the ‘sticky’ topics.
- Confusion around who is in charge of the communication. There was no apparent preference among the participants about who should be in charge e.g. MLA, RMAC, State farming organisations. However, there was a number of comments that it makes the most sense for this to be RMAC’s role.
- The ABSF puts the beef industry a step ahead of competitors. The ABSF is a good step in the process of getting the beef industry’s story out there but there needs to be a lot more communication happening.

3.5.10 Discussion around needs, opportunities and challenges for the ABSF

A number of needs, opportunities and challenges were identified for the ABSF. While these were not necessarily shared by all participants, key themes indicated the ABSF needs:

- more funding
- strong leadership
- to avoid tokenism
- to better engage industry, including leaders as well as producers on the ground and individuals in the supply chain
- to continue collaborating constructively with industry
- to involve the whole supply chain and not be so producer-focused
- to consider and incorporate issues more holistically
- to conceptualise sustainability within the lens of continuous improvement – as a continuum or an ongoing journey - rather than an endpoint
- to recognise that the success of ABSF ultimately relies on how it is used, particularly how it is communicated

3.5.11 Perceptions about the ABSF timeline and suggested modifications to the ABSF

It is clear from many of the interviews that there is a lack of shared understanding around the timeline of the ABSF. It was unclear to a few participants if or when the ABSF would ever be finished, or if it had an end date, what would be their end goal. By contrast however, many others in this study felt that the ABSF's aim is one of continuous improvement is in alignment with a more long-term ongoing timeline.

Suggested additions or modifications to the ABSF include:

- The scope of the waste priority area will need to expand in the future to incorporate transport waste, producer waste, and supply chain waste, not just in the processing sector. Most mentioned that the processing sector has been doing a good job so far at minimising waste.
- The framework needs to engage more with first nations communities in Australia. This was identified as one of the next big opportunities for the industry.
- ABSF needs to more representative of the end-to-end supply chain.
- Due to its importance, it was suggested that communication could be pulled out as its own individual priority area.

3.5.12 The importance of setting targets

The ABSF has set a target to be carbon neutral by 2030 (CN30), and many in this study suggested that this approach should be applied to other areas as well. People discussed the benefits and importance of setting clear targets as part of the evolution of the ABSF into the future.

Below are some key points from participants that illustrate the importance of setting targets:

- Setting and achieving targets helps to build trust.
- Targets pave the way for clear, effective communication. Some in this study mentioned that the sustainability topic that has been most effectively communicated as part of the ABSF is

climate change mitigation. This has been attributed to the fact that a clear ambitious target was set.

- Targets give the industry clear goals to work towards and allow flexibility in how to achieve them.

It was noted that while setting targets is a great anchor for communications that ‘get everybody talking’, there was a lot of uncertainty about whether the industry can realistically achieve these ambitious targets. Some identified the importance of the industry communicating how they intend to achieve these measurable time-bound targets, by detailing their proposed timelines and indicators in their communications with industry and the broader community.

3.6 Communications and engagement – both internal and external

As is reflected in the quantitative rating by participants (Section 3.1) many believed industry communications to be poor overall. This section explores the richness of the discussion related to industry communications.

3.6.1 Framing of the communication challenge

This section details how the beef industry’s communication challenge has been framed, characterised, and described by the participants of this study. This communication challenge is viewed within the context of its communications about sustainability, but not exclusively centred around or related to the ABSF.

There was a perception that the industry communicates better internally than it does externally. Some had clear and specific suggestions for how the industry could communicate better externally e.g. ‘the industry should stay out of the media’, through to ‘the industry just needs a louder voice in telling our story’. Some acknowledged that they did not know what the answers were. This highlights a diversity of views about how people see the communication challenge.

Those who feel industry needs a louder voice often suggested or implied that the industry is already doing a good job overall, and that the public simply needs to be ‘educated’ about this, which will eventually lead to trust and acceptance of the beef industry.

This viewpoint was also linked to the concept of ‘telling our story’, which includes the idea that the beef industry simply needs to improve the way they tell their story. Some viewed this storytelling as marketing or promotion of the industry, and others viewed it as part of building healthy trusting two-way relationships with the broader community and consumers. The idea of ‘relational’/two-way/direct instead of ‘transactional’/one-way/indirect relationships between producers and consumers was also discussed as an alternative to traditional marketing and promotion of beef products. More on this concept in 3.6.3.2 and 3.7.2.10. This idea of two-way negotiation and communication was raised as a potential alternative model for reaching a shared vision for sustainability between the beef industry and the broader community.

In addition, evidence and verification was discussed as an important piece in ensuring that these relationships between the beef industry and the broader community are built on a foundation of trust. There was a perception for many that beef consumers and the broader community are misinformed, unaware, or uneducated about what really happens within the beef industry, and that the ABSF will be an important tool in educating the community. Furthermore, considering the rise of

activism (including a range of ethical viewpoints including animal rights, veganism, and environmental protection) in recent years, many participants conveyed a sense of frustration about this unfair focus by extremists on their businesses.

Others had a view that the industry should endeavour not to ‘attack the messengers of bad news’, and instead listen to what these people have to say. There was a range of opinions about whether these ‘extreme’ voices should have a seat at the table as part of the industry’s stakeholder engagement activities. The pros and cons of ‘casting a wider net’ as part of the ABSF’s consultation efforts are discussed in section 3.5.2.

Many shared the belief that historically the industry was trusted by the public and therefore did not have to justify the value of their business activities. However, there was consensus that community expectations and perceptions are changing, and the industry must adapt to this in a proactive manner. Most believed that the industry’s responses have been more reactive to specific issues or events.

3.6.2 Communication examples

The following examples provide a vignette into activities, narratives, or aspects of the industry that were discussed in the interviews and that provide insights into the reasons why certain types of communication are perceived as effective or ineffective. This section is intended to be illustrative, not comprehensive.

3.6.2.1 Australian beef’s food safety, standards and animal health reputation

It was highlighted by many in this study that Australian beef is widely recognised, both domestically and globally, as a safe quality product to consume due to its robust and effective food safety systems and standards. Given that these systems and standards are highly regarded, this topic was seen by many in this study as consistently, effectively, and successfully communicated to the broader public. This illustrates that when an issue and its assumptions have been established and widely accepted with minimal disagreement about the issue internally and externally, communication is more effective.

On the contrary, for issues that are new, emerging, or there are differences of opinions about the issue, communication can be more complex or difficult. For example, less tangible aspects of animal wellbeing and what constitutes acceptable animal handling and animal export practices are not easily quantified.

3.6.2.2 Carbon Neutral 2030 target – ambitious but effective

The beef industry’s announcement of a carbon neutral 2030 target was viewed by many as an ambitious move that ‘got everyone talking’. It was considered by many as one of the most effective outcomes of the ABSF in terms of communications and improving public perceptions around the beef industry’s environmental footprint. The CN30 aspirational target set a precedent for action and made a bold statement that showed the industry itself, as well as consumers and the broader community that the beef industry as a whole is committed to taking action on climate change. The target was therefore seen in a positive light overall.

However, many acknowledged that there was a lack of consensus about the appropriate methods and pathways to achieve this target. Many also had doubts that the industry would be able to achieve this target at all due to a number of internal issues. This raises the issue of follow-through. If

the industry is to set targets for other areas of sustainability into the future it must ensure that they are achievable, realistic, and measurable as there may be negative repercussions of not achieving these targets.

Thinking more broadly about environment-related communications, many suggested that the industry needs to improve their messaging so that it resonates with the broader community especially around land management. For example, some perceived a level of ‘anecdotal hearsay’ about the impacts and benefits of livestock in the Australian landscape and raised the need for some of these myths and inaccurate anecdotes to be corrected both internally and externally in order for communication to be more effective.

3.6.2.3 Industry should broaden its marketing focus beyond ‘eat more meat’

There was commentary about the way the industry has traditionally communicated with the broader community, particularly the way it markets beef products. Some were critical of the industry’s approach, suggesting that it should broaden its focus beyond simply ‘eat more meat; it’s good for you’ towards a more inclusive and well-researched narrative including consideration of ethics, animal welfare, environmental stewardship and social aspects to ensure that it avoids assumptions about its markets and consumers.

3.6.3 Perceived communication challenges, needs, and trends

Several key phenomena were identified that influence communication efforts, ranging from commentary about the current communication landscape and changing media environment, the rise of activism, the apparent city-bush divide, touchy subjects, and several barriers to effective internal communication. Some aspects of these phenomena are perceived as challenges that limit communication efforts, and others were perceived as opportunities.

3.6.3.1 The current communication landscape and changing media environment

Firstly, it is important to consider the communication landscape and the changing media environment that the beef industry is currently operating within. It was recognised that there is a large amount of communication coming from multiple sources, and not all of them are reliable in sharing accurate information. This can be overwhelming for many – particularly for consumers and the broader community when it comes to discerning which information about the beef industry it can trust. This point can be illustrated with the concept of label fatigue, which recognises that consumers are often required to navigate a plethora of certification labels on food packages (such as certified organic, fair trade, or sustainable) in order to make an informed purchasing decision. Some labels may be more trusted than others for various reasons, and the sheer number of existing certification schemes in the consumer environment can potentially dilute the meaning of new labels. Some in this study considered whether the ABSF could be converted to a certification scheme to provide assurance to consumers that their beef products are sustainable. However, many made the distinction that this should not be the role of the ABSF, and also raised the issue of label fatigue as a potential barrier to the effectiveness of any future sustainable beef certification schemes.

In addition, the current media environment can lead to a sense of scepticism, cynicism, and mistrust of any information coming from the beef industry. Many held the perception that negative stories tend to dominate the media, and this is linked to the idea that one bad news story erodes all other efforts. Given this level of perceived cynicism about information released by the beef industry itself,

the idea of an independent communication body was raised as a way to share accurate information about the beef industry and build trust in the community (see section 3.3.1).

Finally, some highlighted that given the current communication and media trends and culture, it can be difficult to communicate nuance and complexity. It was identified that sometimes the ‘real story’ is not ‘news-worthy’ because there is nothing extraordinary or sensational about it. For example, linked to the 80-20 principle discussed in section 3.3.2, there is a small minority of ‘poor performers’ in the industry who tend to make headlines for ‘bad practice’ such as breaches in animal welfare or illegal land clearing. By contrast there is another small group in the industry who exceed community expectations by going above and beyond to implement best practice. Importantly, there is a much larger group in the middle who are more ‘ordinary’ in their performance and practices.

Proportionally, this group makes up the majority of the industry. However, the media’s hunger for the extreme means they seek out and target these minority issues, which some participants believe unjustifiably amplifies broader community concerns.

Furthermore, it was recognised that animal health is a lot easier to communicate than animal wellbeing. This is because the industry has decades of experience in researching and implementing best practice and communicating about good animal health. The concept of animal well-being on the other hand is relatively emergent and abstract, associated with a wide range of different perceptions both internally and externally. This subjectivity and lack of shared understanding around what animal wellbeing means can make it difficult to communicate clearly.

Many in the study were concerned about the rise of activism and its impact on their businesses, families, and the industry’s overall reputation. This is partly because activists were perceived to dramatise or spread inaccurate information about the beef industry and invade on the privacy of family businesses. There was also frustration that the beef industry has been unfairly blamed for climate change due to the spread of misleading statistics about agriculture being the most significant contributor to Australia’s emissions. Despite this frustration about the methods that activists use to raise awareness about issues, it is worth recognising that many within the industry do agree with the underlying sentiment that the beef industry should move towards practices that are better for people, animals and the environment. For this reason, there was a suggestion to not ‘attack the messenger of bad news’ in cases where there has been a breach of accepted standards of practice within the industry.

3.6.3.2 City-bush divide

Many in this study discussed the idea of an apparent city-bush divide; meaning that there is a geographical and cultural divide between the urban community and the rural community. There was a perception from many in this study that the urban community are unaware, uninformed and have little care or interest in beef industry communications. This is linked to the perception that city people do not know where their food comes from and are not aware of the nuances of beef production. Participants reflected on how to build two-way trust and connection between rural and urban communities, recognising that that community perceptions about the industry and about beef products are changing. These perceptions are apparent in consumer demand for quality products not only in terms of being a safe and nutritious product, but with increasing consideration of how and where the product was produced ‘from paddock to plate’. While there have been some exciting developments in ‘paddock to plate’ transparency and that offer many opportunities for the beef

industry in building consumer confidence, it does not effectively communicate with the broader non-consumer urban community, which remains a challenge.

3.6.3.3 Touchy subjects

There are some topics that hold social stigma when reflecting on how best to communicate with the broader community about issues related to beef production and consumption. This is also relevant within the industry, which will be explained in the next section.

A clear example at the centre of beef production is the concept of animal slaughter. This was identified as a ‘tension point’ and a ‘touchy subject’ that the industry should navigate carefully in its external communications. One participant highlighted that ‘it’s incredibly important to demonstrate that the animals have a good life before you end it for them’. Interestingly, the pork industry has opted for full transparency in this regard, publishing scenes from an abattoir as part of ‘telling their story’ through an online video (see Aussie Pig Farmers, 2020). The challenge for the beef industry is to have those ‘brave conversations’ and not shy away from explaining what it does and why it does it to those who want to know.

3.6.3.4 Internal communication challenges

Some participants indicated that there is limited awareness and knowledge of the ABSF within the industry, particularly among producers. This may have implications for extension of research outcomes which has inhibited implementation of practice change. This highlights a suggestion for industry leaders to identify better ways of communicating best practice within the industry. However, this is recognised as complex and influenced by factors such as uncertainty over whose role is it to communicate and that the purpose of different coordinating or peak bodies and for internal communications may not be clear.

3.7 Trust

Towards the end of our interviews the focus of questions moved to trust in the beef industry and how the ABSF influences participants’ views. In addition, we explored how they felt the ABSF may influence the broader community’s trust. Although this led to a range of insights into building and maintaining trust, there was considerable linkage and overlap with the themes in previous sections of the results.

3.7.1 Trust in the industry and its sustainability

A common line of commentary from some participants was a general trust in the industry to perform and continually improve towards sustainability. This was supported by anecdotes and examples related partly to the longevity of the industry in Australia but also a clear focus for many, especially in the production area, on a custodian ethos towards passing on land to future generations or their children. This line of thinking was also supported by comments that the maintenance of a viable enterprise requires the maintenance of landscape resilience and capacity for production.

For some participants a long association with the industry and the observation of a range of activities such as environmental stewardship, grazing trials and other extension activities, increases their own trust as they have observed both landscape and practice change as well as attitudinal change within the industry. This was occasionally highlighted in contrast to what they considered earlier attitudes from many decades ago that were less accepting of the need for ongoing change.

The 80-20 principle and the diversity and ‘long tail’ of performance across the industry was directly related to some people’s trust in the industry. These participants discussed trusting the producers and others in the supply chain who are progressive, principled, and seek to do the right thing. Many participants described trusting individuals within the industry and described the attributes they considered trustworthy as: honest, transparent, forward thinking, self-critical, and with the capacity to have high impact. There is no escaping the size and the complexity of the Australian beef industry. In the same way that people discussed trusting parts of the government but not necessarily trust in the government as a whole, they similarly discussed high levels of trust for particular parts of the supply chain or industry, while indicating lower trust in other more problematic areas. This indicates the difficulty of gauging internal stakeholders’ trust across a diverse industry. Linked to some commentary regarding the size and some of the culture within the industry several participants indicated that although they trust that the industry will move towards sustainability, they recognise that this change may not be proactive initially. It was indicated that large parts of the industry may initially respond to various community or market pressures in a reactive way which is not necessarily ideal for responding to broader community sentiment. However, they see such changes as an initial acknowledgement of the need for change that would in time lead to a more proactive approach.

A reality for many industries in the last two decades has been the rapid uptake and emergence of high-quality technology like mobile phones and the Internet which means the rapid capture and transfer of vision and ideas through a whole raft of social media platforms. While this rapid emergence of the smartphone and related technology is seen by some as potentially threatening it highlights for many in the industry the absolute necessity for transparency and an honest commitment to seeking not to hide any practices. The key concept here is that of transparency; whether it is through the visual representation of practices or any other form of monitoring. In one instance it was discussed how the rapid emergence of the smartphone caught some parts of the industry rather flat-footed in terms of preparing for, and responding to, community expectations particularly for animal welfare. This concept is linked to the same above related to some initial reactive responses followed later by proactive changes.

Not surprisingly, several participants highlighted the significant risks of a single ‘bad news story’ can have for the entire industry. To some extent this theme or idea cuts across many of the themes discussed above. The need for transparency, constant commitment, verifiable standards, genuine relationships with stakeholders, etc. are essential for when the inevitable ‘bad news story’ comes to light

3.7.2 Trust-building actions

Below we identify 13 actions identified by participants as enhancing trust in the industry and/or the sustainability of the industry. Naturally the areas of sustainability that participants reflected on when talking about what builds trust tended to reflect both their experience and the nature of their view of sustainability. Some participants had a strong focus on animal welfare issues and required actions, some focused on issues of environment and land management, and others tended to frame the conversation around economic viability or human and workforce wellbeing.

3.7.2.1 Demonstrated commitment to sustainability will build confidence

Trust needs to be earned and this is facilitated where individuals or groups show a commitment to activities or practice changes and follow through on that commitment. It was acknowledged by some participants that trust-building actions need to be undertaken by individuals, small groups or a

supply chain. Again, this highlights the contrast between trust at an individual versus trust at an industry level. In some cases, it might be argued that it is not necessarily realistic to expect trust to be earned at an industry scale.

A commitment to sustainability -which has been demonstrated by a range of initiatives by individual organisations and the ABSF- can build confidence and trust in its own right. The fact that there is visible activity and work being done shows the transition from intention to action. In this context however, there appears a contrast between perceptions of small and large producers. Some small family-oriented ones think that large corporates are less trustworthy because they are primarily motivated by financial drivers (lack of benevolence) whereas others see the financial and human resource capacity of large corporates a great advantage to their ability to enact and drive sustainability actions.

Essentially the fact that many in the industry are talking about sustainability routinely and it appears to be translating into actions is sending a clear signal for many in the industry and is contributing to trust.

3.7.2.2 Setting and achieving targets within a reasonable time frame

As was covered in Section 3.5.12, in the context of effective communications, the CN30 target was a good example of setting a clear message through a target to the industry and the broader community. Setting the target also demonstrates that the problem of climate change and emissions from livestock industries is taken seriously and has led to a strong target. In this case it is not necessarily the CN30 but rather the acknowledgement of industry issues of sustainability that is a keen contributor towards trust building. It was also indicated by some participants that if targets are to be set then it is essential to have the appropriate data and to be able to communicate and demonstrate progress over time.

3.7.2.3 Avoiding motherhood statements and fluffy stories

For some practices in the industry related to animal welfare it is acknowledged that action is required to improve things such as rates of compliance and reduced risk to animals. In this situation, real ongoing action in this space is considered essential to building trust. The risk of talking about it but not seeing action on the ground is that trust will be lost even within the industry. Comments such as this were also reflected in the view that sustainability actions and progress need to be routine day in and day out activities not just large public displays through advertisements or website activity. Achieving this can also be realised through listening and remaining open to improvement.

3.7.2.4 Flipping the tone of the conversation around sustainability issues

For many interviews these ideas were discussed not just in the context of trust but for sustainability in general. The need for people in the industry to shift their positions or language from 'defending the status quo' to a different view of sustainability was discussed. Examples of this dichotomy included shifting from:

- defensive to proactive
- victims to responsible stewards
- exponential growth to realistic growth

Genuinely listening to the community and reconsidering how to best engage with people is an important part of changing the conversation and discourse on sustainability.

3.7.2.5 Improved capacity building for producers

Although some participants had reasonably high levels of confidence that the broad group of producers will act sustainably there was a suggestion that there is still opportunity for improved adoption of technologies, practices, or tools that would help with improved decision making. Acknowledging that there are range of extension services from a number of providers, the declining role of government and confidence in it to provide extension services and training highlights concern for the need to build capacity particularly among producers. Furthermore, there was some discussion around the need to better communicate within the industry the economic advantages of sustainability practices. This may relate to pasture and soil management and the maintenance of biodiversity and have his may influence productivity. Building capacity and its ability to influence real practice change is considered as essential to build trust.

3.7.2.6 Calling in / calling out bad practices

Participants raised the significant risks to the reputation of the industry and potential damage to markets caused by poor practice that is unacceptable to a range of stakeholders or the broader community. These risks to reputation according to some participants maybe better dealt with if the industry can identify and call out these poor practices. This is a complex issue however several participants believed an industry that is seen to proactively pursue poor practice and reward improved practices for sustainability can increase the level of trust. Specific examples related to clearing of native vegetation and animal welfare or cruel practices. Action from the industry in this way it is also claimed to improve transparency.

3.7.2.7 Consistency

Although it is assumed by some participants that community trust is fairly high for the industry, they indicated the need for a consistent approach to all standards around animal welfare and production. This consistency in approach also extended to the concept of calling out inappropriate practice.

3.7.2.8 Stronger cultural awareness and understanding of trust

Related to the idea of calling out who practice some participants indicated that across the industry there needs to be a greater cultural awareness of the importance of protecting trust as well as a better understanding of what trust means in a concrete sense. It was indicated that trust is a term frequently thrown around as a buzzword, however, a shared understanding of its importance and its value to the industry may be lacking.

3.7.2.9 Transparency

Transparency was seen as important for sustainability in the context of trust, particularly in relation to animal welfare during the slaughter stage. Because by necessity, the industry relies on the killing of animals this needs to be dealt with carefully but any standards and monitoring of standards around animal welfare needs to be as transparent as possible. Some participants emphasise this idea of making standards and compliance with standards available publicly. This concept was also related to the widespread use of smart phones as mentioned earlier.

3.7.2.10 Telling our story better – educating and building understanding among the community

The idea of ‘telling our story’ is a frequent theme. The distinction here is the keyword ‘better’. For some participants it is acknowledged that there have been a range of attempts at communicating to the broader community. The idea of ‘educating’ the public is often mentioned. However, in this instance the key idea was being more effective with communication. It was acknowledged that many

produces and others in the supply chain are doing things well and that these ‘good stories’ either not communicated well or communicated in a way that is ineffective and is not reach relevant audiences. It is argued by some participants that regular communication of good stories of compliance and meeting and exceeding the standards can help maintain public levels of confidence.

3.7.2.11 Concrete data, evidence and verification – walking the talk

A wide range of issues were discussed under this broad heading of ‘walking the talk’. Some participants highlighted that a frequent response to criticism of the industry is to counter with claims that ‘most farmers are doing the right thing looking after the environment and their animals’ (paraphrased from several participants). Such sweeping statements - although potentially true – were seen as unable to be substantiated with any form of independent evaluation or measurement. A more effective approach is to make claims which can be substantiated with quantifiable data. For these and other reasons maintaining and building trust was seen to benefit from the following:

- Accurate data for reporting throughout supply chains
- Business/farm-level data and verification of that data
- Quality data based on a good methodology/rationale that is acceptable to a range of stakeholders
- Admitting that there have been issues in the past, and providing credible evidence of improvements
- Independence of data where appropriate
- Accreditation and standards

3.7.2.12 The difficulty of monitoring and valuing non-economic data

Economic measures of performance are often measured and communicated. However, some participants indicated other aspects of sustainability still struggle to have quality and rigorous monitoring and correcting this needs to be a priority. This is a complex issue however measurement improvements in non-economic aspects of sustainability helps demonstrate commitment and hence, builds trust.

3.7.2.13 Respectful and inclusive stakeholder consultation - breaking down ‘us and them’

Inclusivity was identified as a mechanism to breakdown ‘us vs them’ attitudes within the industry. Some suggested broadening the circle of stakeholders that the industry engages with around processes including the ABSF and striving to understand better why so many in the industry are wary or untrusting of community or external stakeholders.

3.7.3 Factors reducing trust and trustworthiness

3.7.3.1 External pressures and trends outside of the control of the industry

A wide range of social, environmental and economic trends place a range of pressures and constraints on the industry that may in the future limit its capacity to respond to sustainability challenges. This is despite efforts within the industry to adapt to and respond to these challenges. Examples discussed by participants ranged from the current and future impacts of climate change which may dramatically alter production systems or at the very least perceptions of where particular production systems can be maintained in a sustainable fashion. Other examples include increasing rights of foreign investment and ownership across the supply chains and the link between this and competing for export market space with foreign countries with far lower expectations for animal welfare and workforce conditions and costs of production. Such conditions may put at risk future

investment in the industry and limit capacity for change, and therefore challenge trust in the industry.

3.7.3.2 The sheer size of the industry undermines trust

A common theme is the sheer size, complexity, and diversity of the industry and how this limits the opportunity for, and can undermine, trust building at an industry scale. In several ways this size and complexity works against trust, for example by slowing down the pace of change. A large complex industry requires effective and very well-designed internal institutions as well as appropriate and adaptable regulatory conditions to facilitate change. Some people only place trust in small scale or individual operations and remain fearful of large institutions or organisations.

Relatedly, several participants discussed how they may know individuals or know of individuals' practices that may improve or reduce trust. However, this is not necessarily able to be scaled up to industry wide trust. Some participants are sceptical when leaders or representatives claim great progress towards sustainability in the industry because their own views are informed by observations and interactions with individuals. This has implications for mechanisms of verification and scaling up reporting from the individual farm level to the industry level.

3.7.3.3 Untrustworthy individuals and actions

In contrast to the general attributes of trust discussed in 3.7.1 above, the actions of individuals can rapidly erode trust. Specific examples were raised by some participants with a focus on illegal land clearing particularly in Queensland. The volatile nature of the regulatory environment in Queensland over the past decade, and the opportunistic actions of some landholders to clear remnant and non-remnant vegetation is a very visual and high impact demonstration of how the poor conduct of a few can undermine trust.

3.7.3.4 Poor communication

Commentary around communications was extensive throughout the interviews. In this instance it is highlighted that poor communication in general may influence levels of trust particularly for those within the industry. Further coverage of communication is dealt with in section 3.6 broadly, and within the context of trust in sections 3.7.3-3.7.6.

3.7.3.5 Data gaps and capacity to monitor and measure progress

Data gaps, or an inability to find appropriate measures to monitor progress might be problematic for building trust. For example, if an activity is considered important for the industry for sustainability yet it is hard to quantify or measuring in a way that is easily communicated then this can create a situation where there is limited capacity to report on progress. This may create a risk situation where people may feel like inadequate attention is being paid to the issue.

3.7.4 How the ABSF influences the broader community's trust

There were a wide range of insights and views on how the ABSF influences the broader community's trust in the industry. Not surprisingly, these overlap with, and complement many of the factors influencing trust more broadly and within the industry as discussed above. Overall, there were many positive comments about the ABSF and its capacity to influence industry change and the broader community's confidence and trust. In some cases, these were tempered with caution that the ABSF needs real action and substance and not an opportunity to claim that 'all is well' with the industry.

Broadly several participants commented on a lack of awareness and the need to communicate the ABSF to the community. This was articulated by comments such as ‘you cannot build trust if people are not aware of the framework’. For those holding this view, community awareness needs to come first followed by a commitment to consistently ensure that goals are being met and communicated. How this is communicated requires careful consideration for who it is being communicated with or to, how, when and for what purpose.

Beyond simply raising awareness, other opportunities and avenues for the ABSF to build trust related to commitment, clarity and transparency. For example, creating opportunities to ‘see’ demonstrated progress rather than simply ‘saying we are doing things’ and being honest and transparent with both problems as well as progress. The priority areas for the ABSF must become ‘business as usual’ for trust to be built and maintained.

The temporal nature of trust building was emphasised by comments that trust will increase over time with each annual update and that gaining trust and social license is an ongoing journey and not a destination. In contrast to the view that raising community awareness is important, it was suggested that the power of the framework is its ability to influence community leaders, who in turn will influence their constituency. This contrasting view highlights the need to be clear on the purpose of communications and engagement.

A small number of participants mentioned the role of accreditation and certification for building trust and confidence; however, it was recognised that this is not the role of the ABF. Some participants indicated that there may be some community and industry misconceptions that the ABSF is some form of accreditation tool.

Finally, there were mixed views on whether the framework is more about increasing consumer/external stakeholder trust rather than internal trust. These mixed views on the purpose of the ABSF highlight some of the challenges for internal communication in the industry. To some extent there may be limited awareness and knowledge of the ABSF and its purpose or worse, misunderstanding of the framework.

4 Discussion and recommendations

This report independently evaluated progress on the recently developed Australian Beef Sustainability Framework (ABSF) drawing on 40 in-depth interviews with a diverse range of experts and stakeholders within and external to the beef industry. The project was undertaken within a 12-month period in 2019. The project evaluated:

- The successes and challenges of the Australian Beef Sustainability Framework (ABSF) launched in 2017,
- The process used to develop the ABSF, and
- The effectiveness of the ABSF as a trust building mechanism.

4.1 Successes of the ABSF

Across the board, participants in this study indicated generally positive views that the ABSF was a ‘great start’. The framework has initiated many conversations inside and outside of industry on the challenges of sustainability. This opportunity has facilitated the creation and building of diverse relationships across different stakeholders. These conversations also allowed for in-depth discussion over what should be the priorities for sustainability in the beef industry and how to monitor, report on and communicate progress. The framework demonstrates an industry-wide public commitment to sustainability. This is seen as vitally important as community and consumer expectations around environment, animal welfare, economic resilience, and people & the community are changing. This is particularly timely given the community focus on a range of industries, especially livestock industries, in recent years.

The diversity of views on what should be prioritised and how to measure ongoing improvements, while acknowledged as challenging, is seen as positive. It is acknowledged that is not possible, at industry-wide and national scales, to adequately monitor and measure progress in all dimensions of sustainability. However, processes around the development of the ABSF enable wider consultation and sharing of expectations for sustainability more broadly in the industry outside of some normal day-to-day networking or communication circles.

A specific example of the success of the ABSF for several participants was how it, in conjunction with other industry efforts, has led to a focus on reducing greenhouse gas emissions. These efforts and the ABSF ultimately led to the carbon neutral aspirations of the industry by 2030 (CN30 target). Regardless of the magnitude of the challenge, setting such a bold target was seen as a success because it acknowledged a significant problem for the industry and facilitates alignment of efforts behind a clear target.

Many participants feel that the ABSF has the potential to positively influence trust. However, it was often emphasised that for all parts of the industry it is necessary to ‘walk the talk’ with demonstrated commitment to improved practices combined with transparency and improved communication. On a positive note, all participants rated the ABSF themes and priority areas as being very important to the industry. However, there was room for improvement in industry practice, governance, the trade and policy environment, and last of all, for communication in these areas of sustainability.

4.2 Sustainability challenges for the beef industry

The Australian beef industry is large and diverse and as such contains a wide range of views about sustainability. In some cases, sustainability equates to financial viability. For others there may be more of an environmental and resource management focus. Others may be more interested in animal welfare issues, or perhaps people and the community and passing on land to future generations. In addition to these more focused orientations, some view sustainability in a more dynamic and holistic way, recognising that the ethical dimensions of sustainability evolve rapidly and continuously. Recognising therefore, that sustainability is an ongoing commitment to change rather than a specific end point or outcome is important for all parts of the industry. For some participants they felt that a lack of a shared understanding of sustainability required some attention because maintaining trust, a 'social licence to operate' and meeting community expectations will be hampered if industry lacks a shared view on sustainability and what it means for all aspects of the industry.

Matching internal expectations of sustainability with external expectations is also a key challenge, as there will be different priorities for different stakeholders which may vary over time. It is important to ensure that all priority areas and stakeholder interests are being adequately addressed as part of the beef industry's sustainability journey. This study has also highlighted how industry resilience contrasts too, and overlaps with, sustainability. The highly variable climate and environment with its 'boom and bust' cycles have always and will continue to pose significant challenges which the industry has adapted to in the past.

Industry and individual business cultures are also varied and influence attitudes towards the need to change. Because concepts of sustainability and trust are complex and understood in various ways, yet vitally important to the industry, it was suggested that the industry needs to improve the quality of its internal dialogue on what these concepts mean for industry and how to engage with them.

In addition to these broad cultural and attitudinal issues, there was significant discussion about the challenges associated with improving aspects of land management, environment generally (e.g. waste management, water, biodiversity, soils) and animal welfare (e.g. livestock transport, pain relief). Building workforce capacity (e.g. strengthening research extension and broader industry engagement) and improving the health, safety wellbeing of people (e.g. improving rural mental health, reducing farm accidents) in the industry were also considered to be significant challenges. It was recognised that much is being done in these priority areas, but it is acknowledged that there is always room to improve.

Outside of the internal industry-wide challenges there was some mention of external trends and pressures, such as terms of trade for the beef industry and the relative costs of production (wages, levies, processing etc.) in Australia compared to most of its international trade competitors. There was also some mention of the political reality of operating in a sector where much of the voting public are urban, and thus not directly connected to rural or agricultural systems. Another person mentioned issues of the aging producer base and succession planning for the industry to improve incoming skills and capacity.

4.2.1 Challenges associated with data, priority areas, and indicators of the ABSF

Focusing specifically on the data, priority areas, and indicators of the ABSF, almost all participants in this study considered the current priority areas to be adequate in covering all the key issues associated with sustainable beef production. This is reflected in some of the key challenges discussed above and how they intersect with the priority areas of the ABSF. However, there were comments that the ABSF priority areas will need to continue to adapt and evolve to account for changing internal and external expectations around emerging sustainability issues.

Interviews with key industry stakeholders indicated an overall recognition that the beef industry is on a journey towards sustainability, which is characterised by a set of evolving outcomes to be achieved along the way. This is reflected in the ABSF's latest data, indicators and priority areas - many indicators are lacking baseline data. There are a number of reasons for this including technical and practical issues, and the lack of an agreed methodology for measurement across Australia. There was a significant amount of discussion about these data issues and many stakeholders placed emphasis on the critical importance of working through this to enable better communication both internally and externally.

The challenge for the ABSF is to ensure that it facilitates the generation of meaningful, accurate, reproducible, and indicative data. Measuring what is 'easy' or looks good risks communicating data that is 'too rosy', skewed, or perceived as greenwashing.

4.2.2 Communication challenges

Communication was considered a paramount challenge for the beef industry. It was widely acknowledged in almost all interviews that the beef industry does not communicate as effectively as it could. Some expressed the opinion that communication was easier for the beef industry in the past because there was greater public acceptance. This was perceived to be dwindling in some parts of the broader community, hence the need to develop the ABSF and an associated communication strategy for the future.

While there were widespread comments on the need for improved and more effective industry communication about sustainability, there was relatively little detailed insight into aspects of the proposed communication strategy such as how, when, who and for what – with the exception of a few key interviews. There was a prominent emphasis on the concept of 'telling our story', referring to the idea that the industry simply needs to 'tell its story' to the broader community in order to gain trust and acceptance. This tends to be a one-way view of communications built on an assumption that it is the community and external stakeholders that need 'informing'. However, others viewed the communication challenge as more than a one-way exchange of information via marketing and promotion of the industry. It was suggested that industry should consider a community engagement strategy that is focussed on building trusting relationships, reaching beyond the marketing of beef products, and facilitating an honest and constructive dialogue about broader sustainability issues. It was also suggested that the beef industry should endeavour to stay out of the media as much as possible due to the risk of messages that are not carefully considered, potentially reactive, and the influence of overcrowded social and traditional media landscapes. These diverse views of the external communications will require careful attention, and an explicit focus for the further development of the ABSF.

The quality and congruence of internal communications is an important factor in ensuring that the industry can communicate effectively amongst themselves, as well as with the broader public. This highlights an opportunity for the beef industry to strengthen its internal workforce adaptive capacity and skills in a range of areas including best practice and communication itself, as well as promoting internal health, safety, and wellbeing of people in the industry. It was suggested that greater depth and introspection is needed to more adequately address the health, safety, and wellbeing priority area in the framework, and through industry engagement efforts. For example, looking beyond diversity, education and training indicators, towards a deeper reflection on the social drivers of change such as modelling the industry's adaptive capacity to change, and consideration of mental health data. It was suggested that those managing the ABSF and other industry leaders should engage more with other parts of the industry in one-on-one and group settings to provide them with the tools they need to create change. However, the current lack of government-funded extension services for the beef industry was raised as a barrier to facilitating these processes internally.

Ultimately, the quality of the industry's internal communication will influence their ability to communicate effectively with the broader public. For example, is the industry able to continue coming together to discuss difficult and complex issues, engage in healthy conflict resolution where required, and be transparent, honest, open-minded, and well-intentioned with the public throughout that journey. Internal and external industry data sharing was identified as an essential aspect of this journey. This highlights the importance of capturing meaningful and accurate data through the ABSF and communicating honestly about the complexities, deficiencies, and gaps relevant to this data and associated industry practices.

Further in-depth qualitative research would be required to better understand the specific drivers of change and trust within the industry, and with the broader public, in order to design an appropriate communications and engagement strategy.

4.2.3 Process and governance challenges for the ABSF specifically

Reflecting on the ABSF specifically, it is important to reflect on whether the process and governance of the framework itself is able to effectively serve its intended purpose and meet changing community expectations into the future. Most in this study had very positive comments about the ABSF's process and governance, particularly in the way that it fosters constructive and inclusive stakeholder relationships among those in the consultative committee. The most positive comments were from stakeholders who were directly engaged in the steering group or consultative committee.

The ABSF was celebrated for its ability to bring together a diverse range of stakeholders both within and external to the industry, and converse constructively about sustainability. On the other hand, there were some in this study who believed that the ABSF could improve its consultation strategy by 'casting a wider net' to include a broader diversity of voices. Internally, some held the view that the ABSF was too producer-focussed and that it should actively include additional voices from the processing, livestock transport, and live export sectors. Externally, there were suggestions to invite some of the more 'extreme' stakeholders such as animal rights activists into ABSF discussions. Others were reluctant to 'cast a wider net' because there is a risk of the conversation becoming unconstructive and potentially marginalising parts of the industry that feel misrepresented. Or worse, some may feel if the net is too wide it risks perpetuating destructive conflict dynamics. Without internal industry support, particularly from those not directly involved in the framework, the ABSF will not be as effective as it could be.

Genuine engagement with first nations' people was raised as a key opportunity for the industry into the future, whether that be through direct inclusion of indigenous voices on the steering group or consultative committee, or by the development and addition of indicators around reconciliation, decolonisation, and cultural heritage management as it relates to beef production in Australia.

In addition, the ABSF should ensure that it has the appropriate mechanisms in place to benchmark itself against other industry activities at various levels including individuals, businesses, and the industry-wide activities. The ABSF should also ensure that its vision, mission and themes are aligned where appropriate with other national sustainability frameworks for other agricultural industries such as eggs, dairy, and sheep, and international initiatives such as the Global Roundtable for Sustainable Beef.

Finally, those who were involved in the consultative committee or steering group for the ABSF complimented the ABSF on its internal leadership and consultative practices. Given that many aspects of the ABSF's day-to-day management are managed by individual players, this raises potential issues for future planning and continuity. It is therefore important to consider a succession process for the staff managing all aspects of the framework.

4.3 The ABSF as an effective trust building mechanism

4.3.1 General aspects of trust for the beef industry

Trust for the beef industry has received significant informal and formal attention in recent years (eg. Campbell 2013, Buddle and Bray 2019). This research uncovered many factors which according to participants influence trust generally for the industry as well as the factors that can potentially erode trust. The distinction between the role of the ABSF and more general industry practice in maintaining or building trust is not clear. For this reason, the insights gained apply to both the framework and general practice.

Overall, there was a broad acceptance that the industry and most within it have good intentions and the appropriate culture to work towards sustainability, and in some cases the observations and track record observed by participants influence their general trusting of the industry. Along with this was the view that the industry essentially has no option but to change and that it has the capacity for such change. The rate at which these changes are occurring is variable and some acknowledge that initially change may be slow and reactive, but this does not diminish progress towards sustainability.

The concept of the '80-20 principle' or the 'long tail' of industry performance was a theme also discussed in the context of trust. It is acknowledged that there are many forward thinking and progressive players in the industry driving sustainability. Poor performance by some individuals does erode trust.

Similarly, these poor practices are increasingly under the spotlight and the era of the smartphone and social media of the last 15 years highlights a need to accept transparency in all aspects of industry practice. Transparency was the theme that permeated all discussion around trust for both participants and for the broader community. Finally, much discussion focused on how it is easier to trust individuals or individual supply chains rather than an entire industry. These conversations highlighted the attributes, or characteristics of individuals that people find trustworthy and included:

honesty, transparency, forward thinking, self-critical, and the capacity for individuals to have a high impact.

4.3.2 Trust-building actions

Many actions were identified by the participants which can contribute to improved trust for the industry. Some of these were the opposite of those which erode trust discussed above, however, others are quite specific and worth highlighting.

Industry commitment to sustainability is essential. If the industry can avoid motherhood statements while communicating clear commitments, supported by specific targets through ongoing actions and measurable outcomes, then it will build confidence and trust for most of the participants.

Some argued that the tone of the conversation around sustainability issues from within the industry needs to change. For these participants the tone reflects a culture for some in the industry as being defensive or feeling the victims of external social pressure for change. A shift from defensive to proactive or from victims to responsible stewards would be an important cultural change that would increase their confidence in the industry in moving towards sustainability. Seeing industry leaders working with visionary thinkers and working to improve the capacity particularly of producers in the industry are important trust building actions for some.

As discussed in other parts of this report it's acknowledged that for many, trust tends to be built at an individual scale rather than an industry scale. According to Edelman (2020), CEOs are expected to show leadership and speak out on issues of importance or concern to society. In this study, beef industry leaders were similarly encouraged to 'call out' bad practices, instead of defending them or staying silent. It's therefore important to consider how the industry as a whole manages the 'calling in' or 'calling out' of bad practices, which can help build confidence for the broader industry.

For some participants it was recognised that trust, although a commonly used term in a range of contexts, is a complex concept. For these participants it was important to build a stronger cultural awareness and understanding of the complexities of trust within the industry. This may enhance the ability for people in the industry to address trust in a more nuanced way.

Transparency, which has been discussed earlier, is essential for trust building. Transparency also requires concrete data and evidence which is gathered and communicated in a way that is acceptable to a range of stakeholders. Transparency also involves acknowledging past and present problems and issues and indicating a pathway to improvement that can be supported by data at a business level through to an industry level with some degree of independence around reporting and monitoring.

From a process point of view the ABSF and industry processes should always aspire to facilitate respectful and inclusive stakeholder consultation. There was a feeling for some participants that there is far too much of an 'us versus them' mentality in the industry which inhibits quality dialogue and stakeholder engagement. The idea of 'telling our story', which was mentioned many times in interviews, could be amended to 'telling our story better'. Too often communication is framed only as one-way, educating the public or other stakeholders. The industry could consider the idea of 'telling our story' and instead continue to work towards more effective communication by both listening and understanding various community and stakeholder interests.

4.3.3 Factors reducing trust and trustworthiness

A number of issues were identified that reduced trust for the participants. To some extent some of these factors are outside the direct control of the industry. For example, there are numerous economic, social and political trends that impact the industry in a range of ways such as levels of foreign ownership and competition in external markets with countries that have a lower cost of production. For some this might change attitudes towards land management, human resources, or animal welfare for some enterprises. Similarly, the sheer size of the industry and its complexity and diverse range of supply chains limits the ability to have trust at an industry-wide scale. This highlights that for a large industry there will always be some untrustworthy individuals who carry out actions or practices that are considered unacceptable. Several participants highlighted issues such as illegal land clearing by individuals as eroding their trust. Some issues of communication or poor communication also can reduce or limit trust. Communications is another common issue identified in this study that is relevant to all aspects of the ABSF and the industry more broadly. On a more tangible level data deficiencies and the capacity to monitor and measure a diverse range of sustainability inspirations can affect trust. For example, the industry may aspire to improved animal wellbeing, yet this may be difficult to monitor and communicate effectively as it is often less tangible than quantifiable measures of animal health.

4.3.4 How the ABSF influences the broader community's trust

There were a wide range of insights and views on how the ABSF would influence the broader community's trust in the industry. Not surprisingly these overlap with and complement many of the factors influencing trust more broadly and within the industry as discussed above. Overall, there were many positive comments about the ABSF and its capacity to influence industry change and the broader community's confidence and trust. In some cases, these were tempered with caution that the ABSF needs to reflect and measure real action and substance and not an opportunity to claim that 'all is well' with the industry.

There was, however, much concern about the general lack of awareness across the community of the ABSF. Although the ABSF has much potential it is considered that at this stage the limited public and community awareness means it is not able to influence trust in its own right. On a positive note, however, it was observed that the framework shows commitment and measures actions which means that stakeholders are able to get a sense of what is happening in the industry for sustainability. The Framework does appear to influence key community leaders who it is argued then will influence their constituents or interest groups. For this reason, the framework is able to influence broader community trust indirectly through networks of stakeholders. Because the ABSF has a focus on indicators and measurable outcomes this shifts the focus to being honest and transparent rather than simply telling positive stories which may be unverifiable.

Finally, there were mixed views on whether the framework is more about increasing consumer/external stakeholder trust rather than internal trust. These mixed views on the purpose of the ABSF highlight some of the challenges for internal communication in the industry. To some extent there may be limited awareness and knowledge of the ABSF and its purpose or worse, misunderstanding of the framework.

Not surprisingly, several participants highlighted the significant risks that a single 'bad news story' can have for the entire industry. To some extent this theme or idea cuts across many of the themes.

The need for transparency, constant commitment, verifiable standards, genuine relationships with stakeholders, etc. are essential for when the inevitable ‘bad news story’ comes to light.

4.4 Insights for future adaptation and improvement of the ABSF

A clear, consistent and positive message for the ABSF is that it has been an excellent start and has helped the industry to get on the front foot at meeting industry, community, and consumer expectations of sustainability. This work has shown a range of challenges and issues that influence the ongoing improvement and effectiveness of the ABSF. These challenges, particularly those which are internal to the industry, tend to relate to broad issues of a complex industry, complex internal governance, a diverse range of cultures and attitudes towards sustainability, and a range of issues to do with communication. The insights in this section are not intended to be prescriptive to particular aspects of the ABSF such as changes to themes, priority areas or how to monitor and report on them. Our suggestions relate to developing explicit processes to enhance the ongoing adaptation of the ABSF in a way that can build internal and external confidence and trust in the framework’s ability to both track performance and practice change as well as indicate the industry’s responsiveness to changing community expectations.

Although this study has evaluated some aspects of the ABSF there is a need to develop an explicit evaluative process that can directly inform modification and improvement to the processes used for the framework as well as the specific areas that it attempts to report on. The report has highlighted the complex challenge of balancing diverse internal and external stakeholder expectations around the industry’s sustainability efforts. Keeping this in mind, evaluation of the ABSF should draw on independent and external regular assessment balanced with open and transparent mechanisms for internal stakeholders to reflect on and suggest improvements for the framework. The balance of these two is essential for ensuring trust and confidence that the industry is responsive to external interests but can maintain traction and relevance to those within the industry.

The scope of ongoing evaluation should include be at a realistic and effective timeframe with regular benchmarking against a range of international practices and allied sustainability frameworks as well as individual supply chain and enterprises best practice and sustainability policies. Although the ABSF has informally incorporated some aspects of this benchmarking in future it should be more transparent and explicit. The rationale for this is that some sustainability frameworks particularly in the international scene maybe picking up emerging issues. This would allow those responsible for adapting the framework to consider if new themes, priority areas, or methods to measure and report on progress are deserve consideration. Internal mechanisms for feedback and review can effectively be ongoing with milestones set for reporting. External review and evaluation can potentially be expensive and is unlikely to yield results that are useful if it occurs too frequently. Based on our evaluation after a little over two years since the inception of the ABSF a time span of four or five years could more realistically determine progress of the framework and recommend meaningful changes. Any external evaluation will need to have a high degree of independence and acceptance to a range of key stakeholders.

The report also indicated some confusion and questions about who should be responsible for carriage of the ABSF. Although processes for the framework have been broadly consultative there is a degree of concern that the ABSF is not well integrated with related sustainability efforts, and lacks a clear role within the industry and may not be as well supported by its internal governance

arrangements as it should be. Again, appropriate transparent and ongoing mechanisms for feedback and evaluation of the framework may improve and clarify the role and legitimacy of the framework as it evolves. It may be that further evaluation would lead to suggestions for the best model of support, leadership and resourcing for the future of the framework. It is recognised that balancing ongoing external expectations of the beef industry with internal concerns and challenges is one of the key issues of success for the framework. Should the framework attempt to be too progressive and too inclusive there is a risk that it may lose legitimacy and support from what is a very large and complex industry. However, the alternative of being too introspective and potentially too conservative in approach to sustainability places at risk the industry's opportunity to lead. Effective engagement in ongoing evaluation of the framework is one mechanism to deal with this very challenging issue for the framework.

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