

Live Exports and the Australian Community 2024

A National Program of
Community Sentiment Research
November 2024

Citation

Voconiq (2024) Live Exports and the Australian Community: A National Program of Community Sentiment Research. Voconiq, Australia.

Copyright

© LiveCorp 2024. To the extent permitted by law, all rights are reserved and no part of this publication covered by copyright may be reproduced or copied in any form or by any means except with the written permission of LiveCorp.

Important disclaimer

The Australian Livestock Export Corporation Ltd (LiveCorp) advises that the information contained in this publication comprises general statements based on scientific research. The reader is advised and needs to be aware that such information may be incomplete or unable to be used in any specific situation. No reliance or actions must therefore be made on that information without seeking prior expert professional, scientific and technical advice. To the extent permitted by law, LiveCorp (including its employees and consultants) excludes all liability to any person for any consequences, including but not limited to all losses, damages, costs, expenses and any other compensation, arising directly or indirectly from using this publication (in part or in whole) and any information or material contained in it.

Researcher contact details

Dr Kieren Moffat
Voconiq CEO and Co-founder
info@voconiq.com

Voconiq, Our story

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

To learn more, go to www.voconiq.com

Contents

- 05** Introduction
- 06** The research process
- 07** What did we measure?
- 08** Who completed the 2024 national surveys?
- 09** Community views towards the live export industry in Australia
- 14** Listening and responding
- 16** Industry information and the community
- 20** Regulation
- 23** Walking together on welfare
- 26** Perceptions of transit
- 30** Sheep
- 35** Building relationships through trust
- 39** Conclusion



Acknowledgements

This program of work is funded by the Livestock Export Program, a collaboration between the Australian Livestock Export Corporation Ltd (LiveCorp) and Meat & Livestock Australia (MLA), the not-for-profit industry service providers for livestock exporters and farmers. LiveCorp and MLA acknowledge the provision of funding by the Australian Government and levy payers to support the research and development detailed in this publication.

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

Introduction

The Australian live export industry plays a critical role in the nation's agricultural economy. It also plays a significant role in access to overseas markets with otherwise complex needs. The industry is facing increasing scrutiny in a changing social and regulatory environment and is proactively meeting these changes head on.

This 2024 report represents the fourth year of an ongoing program of research. Funded by LiveCorp and Meat & Livestock Australia, this report provides a robust analysis of community attitudes, trust and acceptance of the live export industry in Australia.

Since its inception, this research program has engaged with a diverse cross-section of the Australian community, aiming to capture a representative sample of opinions and concerns. This year's survey continues to explore critical issues such as animal welfare, regulatory confidence, and the economic contributions of live exports, reflecting both historical trends and contemporary challenges.

The findings presented in this report are intended to inform stakeholders across the live export value chain, including policymakers, industry participants and the broader public. By understanding the nuanced perspectives of Australians, this research aims to foster a constructive dialogue around the future of live exports and ensure that community voices are effectively heard and addressed.

New elements were introduced in 2024 to better understand the socio-economic context of live exports in response to recent events, and how subsequent media coverage may influence public perception of the live export industry. Following both an extensive national survey (anchor) and a follow up pulse survey, this report provides a comprehensive view of current community sentiment, highlighting areas of trust, concern, and opportunity for the live export industry.

During data collection for the anchor survey, a live export ship carrying 15,000 sheep and cattle was sitting off the coast of Fremantle, after returning due to conflict in the Middle East preventing the ship from completing its intended voyage. This event prompted increased national media coverage and debate on the regulation of the live export industry¹. In May, the government announced the closure of live sheep exports by sea would occur in 2028²; Federal Parliament later passed legislation to that effect in early July³. By conducting the pulse survey in June as a follow up to the anchor survey, this research has been able to gauge the impacts these events have had on community sentiment towards the live export industry. Through path modelling, this provides a structure on how to respond to the concerns of the Australian community to ensure ongoing trust in and acceptance of the Australian live export industry.

¹ Rebecca Trigger. (2024). MV Bahijah stranded off Fremantle coast with 15,000 animals on board as government considers quarantine plan. <https://www.abc.net.au/news/2024-01-30/live-export-ship-mv-bahijah-stranded-off-fremantle-port/103401754>

² Murray Watt (2024). \$107 million to support phase out of live sheep exports by sea. <https://minister.agriculture.gov.au/watt/media-releases/support-phase-out-live-sheep-exports-sea>

³ Rhiannon Shine, Blake Kagi, Phoebe Pin and Grace Burmas (2024). Parliament passes federal government's legislation to ban live sheep exports by sea by 2028. <https://www.abc.net.au/news/2024-07-01/live-export-ban-passes-federal-parliament/104042980>

The research process

Year four of this research looked to further refine work conducted in the previous three studies. In the first year of the research program, we engaged industry stakeholders extensively and conducted desktop and media analyses to develop a baseline survey. In years two and three, the survey was refined to better capture community attitudes, informed by feedback from the initial data and further stakeholder engagement. Year four is unique as it captured not only the annual baseline anchor survey but an additional smaller 'pulse' sample seeking to understand the impact of contemporary issues on trust and acceptance of the Australian live export industry. New questions were introduced this year to better understand attitudes towards the supply chain and communications in the context of Australia's live exports.

Both surveys were administered online using a research panel, targeting participants over 18 years old from across Australia, including regional areas. Participants were not informed of the survey's content prior to recruitment.

The fourth national survey's main data collection occurred from February 2 to February 26, 2024. Out of 5,800 completed surveys, 5,597 were analysed after data cleaning, removing those that did not meet criteria for completion times or response patterns. Notably, during this survey's rollout, there was significant media coverage of a live export ship anchored off the coast of Fremantle, WA, following its return due to conflict in the Middle East.

The subsequent pulse survey was a refined instrument that sought to sample the views of 1,000 participants. Out of 1284 surveys completed between 13 June and 28 June, after cleaning the data represents a sample of 978.

This report compares responses from all national surveys conducted over the program to track changes in community views, and notably compares the two surveys conducted in 2024.

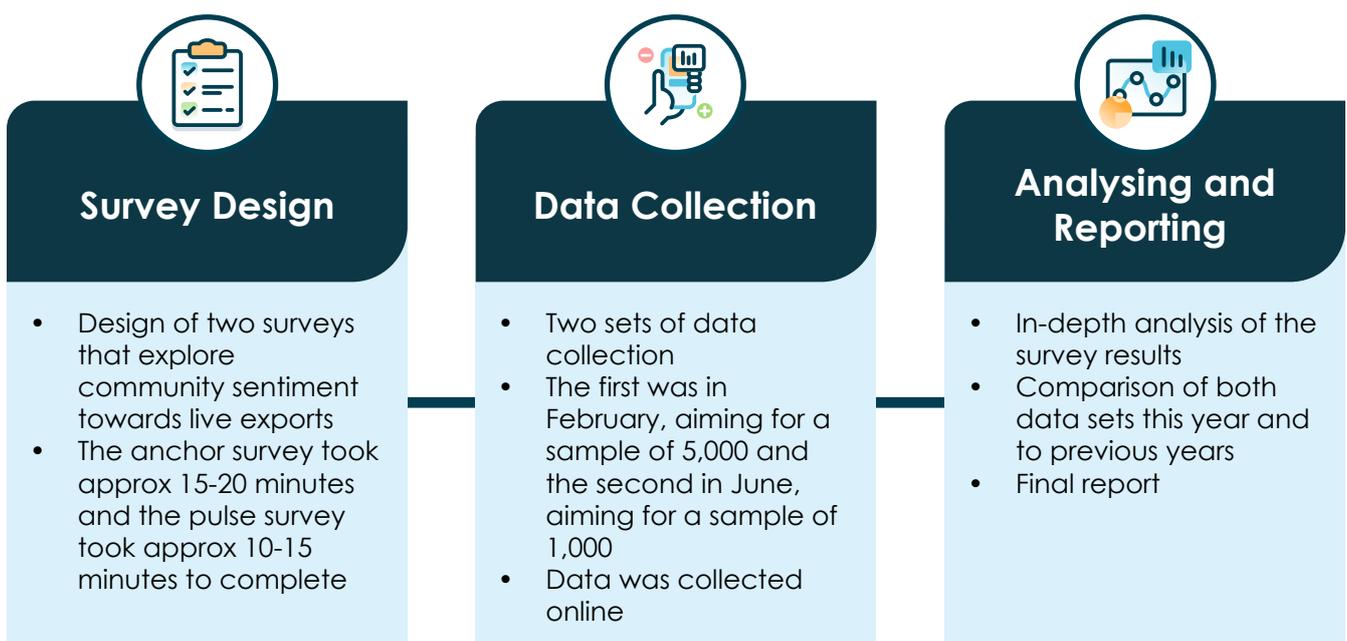


Figure 1. Research process overview.

What did we measure?

The fourth national anchor survey continued to explore community attitudes toward various elements of the live export value chain. The process is governed by different regulatory frameworks at various stages, and the live export industry overlaps significantly with other agricultural sectors. The survey aimed to capture this complexity and nuance.

As in previous years, participants went through an information and consent process and provided comprehensive demographic information.

This year, the focus was on identifying areas of risk, highlighting key opportunities and addressing relevant issues within the sector. Additionally, we completed a smaller follow up pulse survey in June, to review key measures of trust and acceptance to better understand the impact of the media cycle on these key metrics.

The report aims to inform and guide meaningful conversations about live exports, informed by a genuine understanding of the Australian community's perspectives.

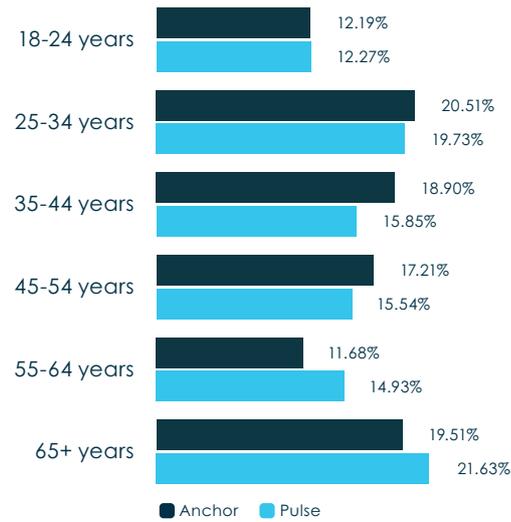
Standard topics included in the 2024 community sentiment survey	Novel topics included in the anchor survey	Novel topics included in the pulse survey
<ul style="list-style-type: none"> • Information sources • Attitudes towards welfare • The position of agriculture, including farming and live exports • Attitudes towards parts of the live export process • Value proposition of the industry • Confidence in regulation • Trust and acceptance of the industry and associated stakeholders • Perceptions of sheep export 	<ul style="list-style-type: none"> • Level of concern towards activity on ships • Perceptions towards media 	<ul style="list-style-type: none"> • Review of regulation • Understanding different aspects of how the community interacts with the news media

Figure 2. Focus areas for 2024 live export anchor and pulse survey.

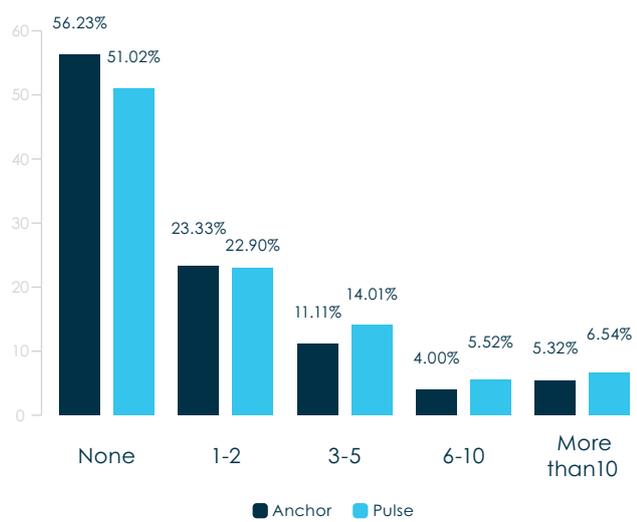
Who completed the 2024 national surveys?



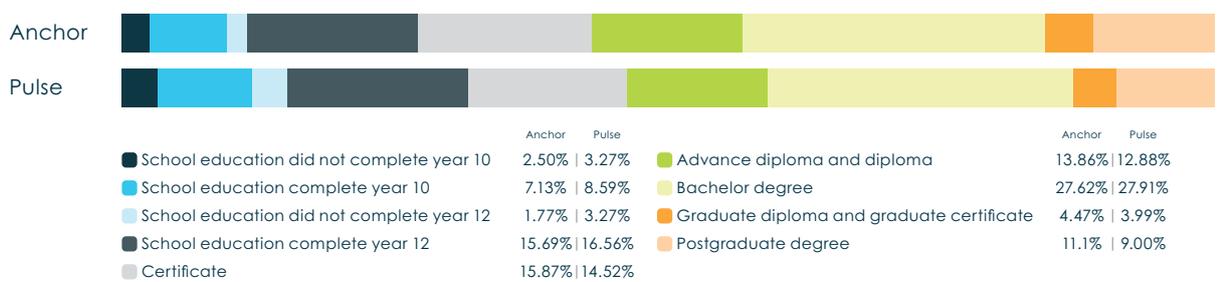
Age of participants



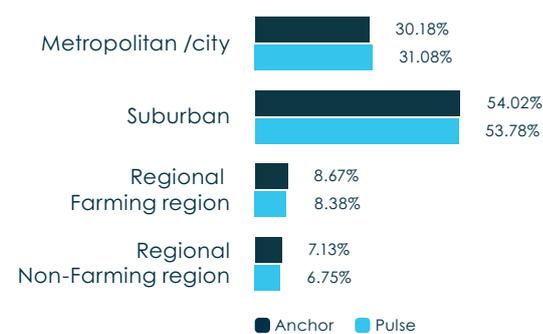
Number of people known that work in agriculture



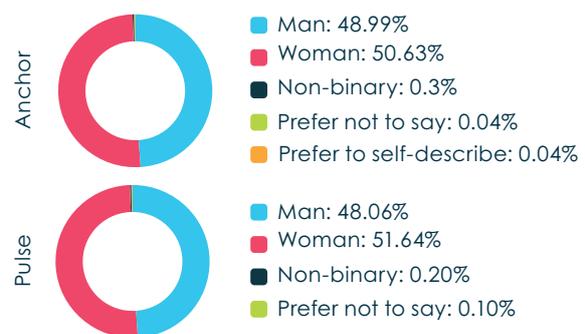
Highest level of education



Residence by location type



Gender



Community views towards the live export industry in Australia

Understanding how live exports fit into the wider agricultural and economic landscape in Australia, and the broader social context in which the industry operates both nationally and overseas, is critical to understanding the value proposition of the Australian live export industry.

Over the duration of the research, there have been indications that the value proposition of the live export industry in Australia has strengthened over time. This year saw a modest shift in this trend.

Participants were asked about the positioning of the live export industry in various domains, including its importance to Australia and the economy. Participants were asked a series of questions and provided the ability to respond using a 5-point scale from 1 ("Strongly disagree") to 5 (Strongly agree"), where 3 represents "Neutral". Over time, these scores have grown and then stabilised, highlighting the increasingly positive sentiment the Australian community has for the live export industry.

In 2024, when asked if the live export industry makes an important economic contribution to Australia, 78% of respondents agreed with the statement in both surveys (16% neutral; 6% disagree on both surveys). This is an increase of 6% agreement since the original measure in 2019. Similarly, when asked if 'the live export industry makes an important contribution to farming communities that produce livestock for export' the majority of the community agreed in both surveys (anchor: 77% agree, 18% neutral, 5% disagree; pulse: 78% agree, 16% neutral, 6% disagree), and results have shown an increase since the baseline measure (73% agree in 2019). Australians continue to recognise the importance of live exports to the Australian economy.



Understanding the costs and benefits

Over time, we have explored how community members feel about the live export industry overall. Participants were asked “as a whole, how do you feel about the costs and benefits of the live export industry in Australia?” Analysing the responses to this question, the proportion who agreed that “benefits outweigh costs” has increased from 36% in 2023, to 37% in the anchor this year, and finally to 41% in the pulse (Figure 4). Notably, answers for “costs and benefits are equal” (a score of 3 on the 1-5 scale) has remained relatively stable between 2023 (38%) and 2024 (35%). This represents a shift to a greater understanding of the contribution of live exports, and a more accepting view of the industry by the Australian community.

The Australian community was also asked about its views of the value of the live export industry to overseas markets. In 2024, the value of these activities to export markets was clear, with overall agreement on questions regarding employment opportunities in overseas markets (pulse: 68% agree, 27% neutral, 5% disagree), providing overseas markets with improved diet and nutrition (pulse: 64% agree, 26% neutral, 10% disagree) and supporting important cultural practices in other countries (pulse: 50% agree, 37% neutral, 13% disagree). These scores experienced a dip in the anchor measure and a return to baseline in the pulse.

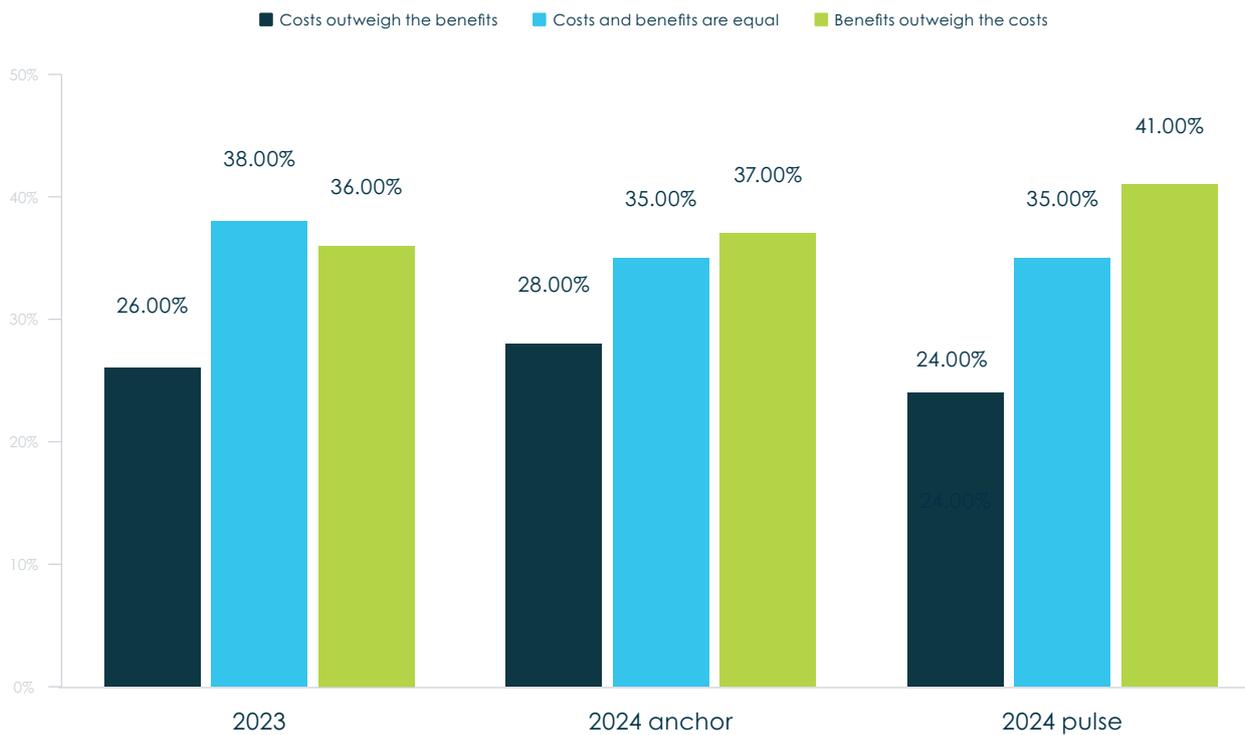


Figure 4. Percentage responses to cost and benefit questions, 2023 anchor to 2024 anchor and pulse.

Trust and acceptance of the industry

A key outcome measure for this work is the extent to which the Australian community trusts and accepts the live export industry. Trust is a key measure of relationship health and is central to an industry's social licence to operate. Acceptance highlights the extent to which an industry has met the expectations of its community as a whole and is deemed legitimate.

Trust and acceptance are measured on a scale where 1 reflects lower trust and 5 reflects higher trust. The average trust and acceptance ratings for the industry steadily increased from 2019 to 2023. However, both declined to below the midpoint of the scale in the 2024 anchor survey before going back up in the pulse survey (Figure 5).

The average rating for trust of the live export industry in the 2024 anchor survey was 2.82. Reviewing the distribution of answers for this measure, we found that while fewer people trusted the industry than in the previous year (25%, compared to 36% in 2023), more people answered "moderately" than in previous years (40% compared to 32% in 2023), and the number of people who answered "not at all" or "slightly" remained relatively stable (35%, compared to 33% in 2023).

The average rating for acceptance of the live export industry in the 2024 anchor survey was 2.96 (Figure 5). Unpacking the score, similar to trust, the number of participants who answered moderately was the highest (35%), followed by those who accepted (33%) then those who did not accept (32%). These scores reflect an uncertainty in the Australian community during the collection of 2024 anchor data.

In the 2024 pulse survey, we saw an increase in trust and acceptance of the live export industry. The average rating of trust in the industry overall was 3.02, whereas acceptance was 3.07. These are the highest trust and acceptance scores for the live export industry since the baseline 2019 survey, returning to the overall, longer term trend after the dip experienced in the 2024 anchor. This suggests that the community is responding positively to efforts the industry has made to build community trust and acceptance.

Together, these two sets of responses suggest that the Australian community is stepping towards an understanding of the broader value proposition of the live export industry. In the current social context the 2024 changes highlight a community that is responding rapidly to a change in media coverage and widespread conversation about the live export industry. Overall there is a gradual trend toward increased trust and acceptance, as seen in the pulse survey, highlighting the benefits of long term practice change.

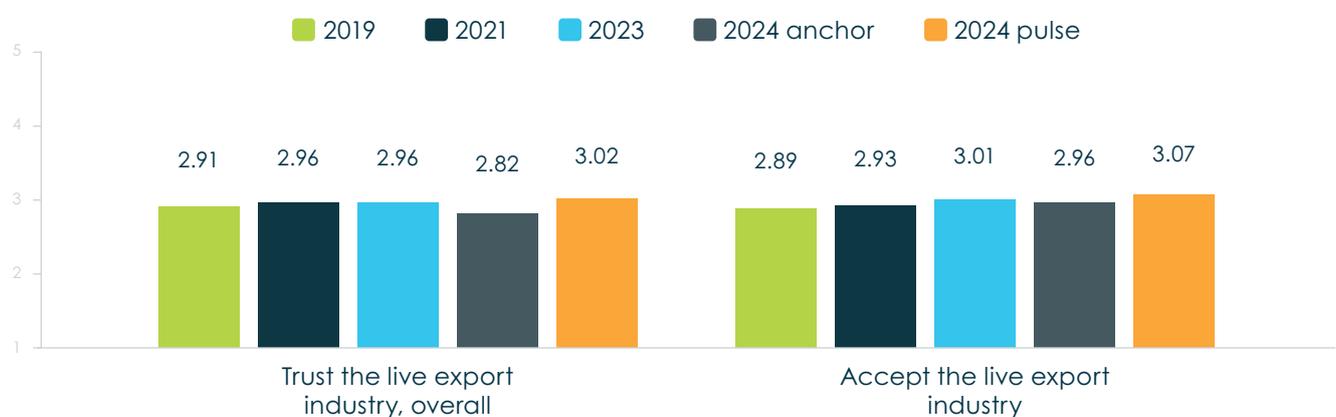


Figure 5. Ratings of agreement (means out of 5) on trust and acceptance measures, 2019 - 2024.

LIVE EXPORTS AND THE AUSTRALIAN COMMUNITY

Comparing trust between groups including livestock farmers who do not export their animals, veterinarians and varying levels of government, the means for each group dropped in the 2024 anchor before increasing in the subsequent pulse. As in 2023, the live export industry overall remains more trusted than the federal government (2024 anchor mean (AM) = 2.69), foreign governments which support the live export of Australian animals (AM=2.41) and livestock exporters (AM=2.68).

New questions were included in both 2024 surveys that measured three critical domains of trust: humanity, integrity and competence. Comparing between the three scores, the live export industry scored highest on competence (Trust the Australian live export industry to be the best at what they do); followed by integrity (Trust the Australian live export industry to act responsibly), and lastly humanity (Trust the Australian live export industry to value the needs and desires of people like me) (Figure 6). All items were scored on a scale of 1 (not at all), to 5 (extremely).

Comparing the anchor and the pulse, we see a similar pattern to the headline trust scores, signifying a strengthening of the relationship between the live export industry and the Australian community.

More members of the Australian community trust the live export industry than distrust it, based on the pulse distribution score. On the competence domain, 27% indicated "not at all" or "slight" trust, 36% indicated "moderate" trust and 38% indicated "very much" or "extreme" trust. On the integrity domain, 27% indicated "not at all" or "slight" trust, 35% indicated "moderate" trust and 38% indicated "very much" or "extreme" trust. Finally on the humanity domain, 32% indicated "not at all" or "slight" trust, 34% indicated "moderate" trust and 34% indicated "very much" or "extreme" trust.

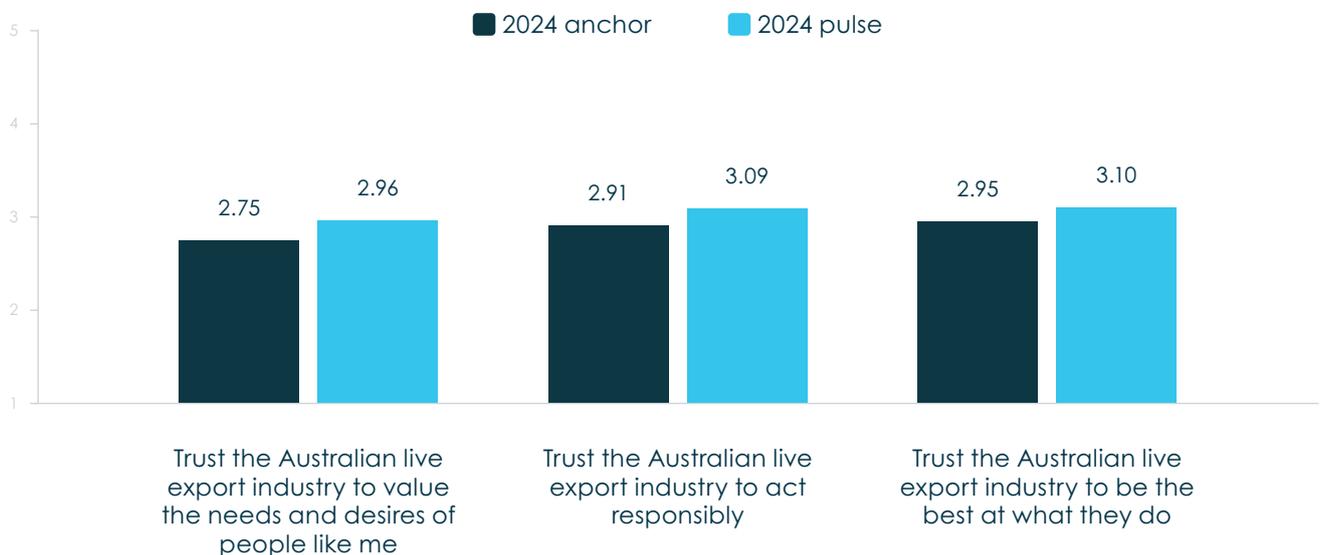


Figure 6. Ratings of agreement (means out of 5) on domains of trust measures, 2024.

When investigating the factors that most impacted the trust between the live export industry and the Australian community, four key drivers were identified. While they have stayed consistent with previous years, these drivers have significantly changed in weighting and importance. This year procedural fairness and regulation were found to most impact trust. This is discussed later in this report.

Key insights

The trends show that both trust and acceptance in the live export industry decreased in the 2024 anchor before increasing during the later pulse survey to the highest mean scores since 2019. This effect was mirrored in all other groups investigated for this study. The data also found that the Australian community most believes in the competence of the live export industry to be the best at what they do when compared to integrity and humanity dimensions of trust.

“ I support the live export industry and the farmers who rely on it.
– 2024 survey participant.

“ A most important industry benefiting the Australian economy as a whole.
– 2024 survey participant.

Listening and responding

Industry responsiveness has been shown to be a significant driver of trust in this research since 2019. This driver has two key measures;

- The extent to which an industry is perceived to listen and respect community opinions.
- The extent to which an industry is seen to be willing to change its practices based on the concerns of the community.

In 2024 we see a change in the procedural fairness measures. In the anchor, we see a continuation of the slight downward trend from the 2023 survey in the percentage of respondents who agreed that the industry listens to and respects community opinions, with 30.8% agreement (down 0.6% from 2023). In the pulse, results show a notable turn around with 42% agreement (Figure 7; 20% neutral, 38% disagreed, Figure 8).

Similarly, there was a significant increase (9%) in agreement on whether the industry is prepared to change, rising from 35% in the anchor survey to 44% agreement in the pulse (Figure 7; 40% neutral, 16% disagreed, Figure 8).

Combined, these results show a significant improvement in perceptions of industry responsiveness in the 2024 pulse. The pulse survey data highlights a community that is giving credit to the live export industry when there is a perceived change in both listening and responding to their concerns, in the context of both increased media activity about the live export industry and increased hunger for information by the broader community; this will be discussed in the next section. It is up to the live export industry to reflect on the lessons from this year and look to understand how they can maintain these shifts in perception.

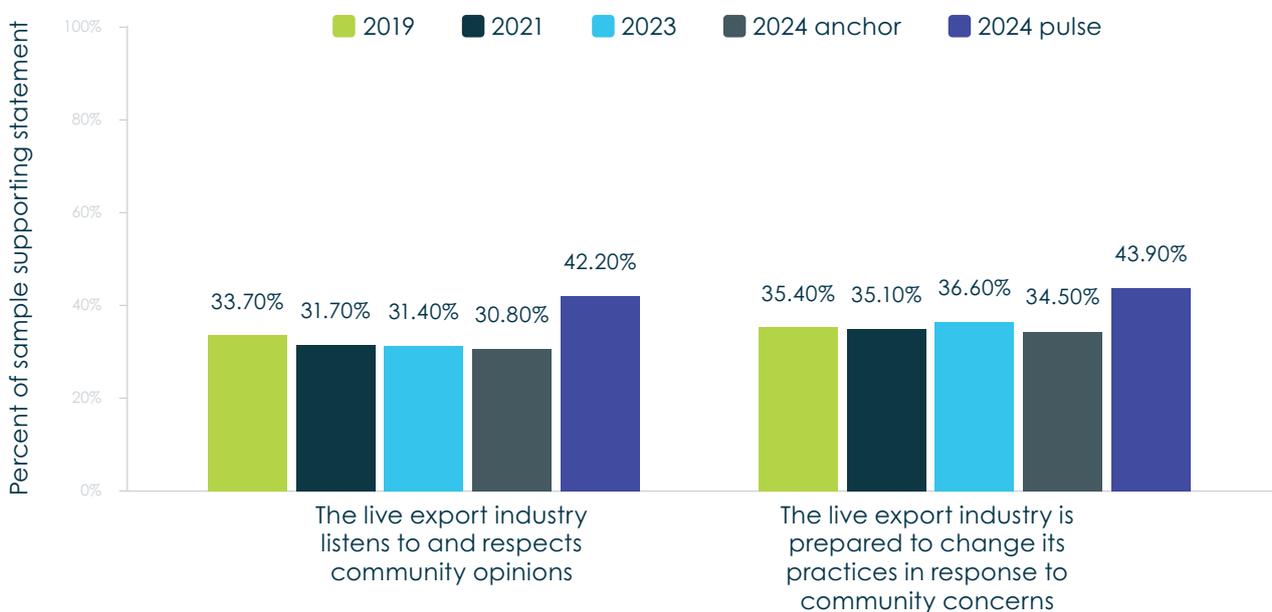


Figure 7. Percentage agreement that the live export industry is prepared to change in response to community concerns, 2019-2024.

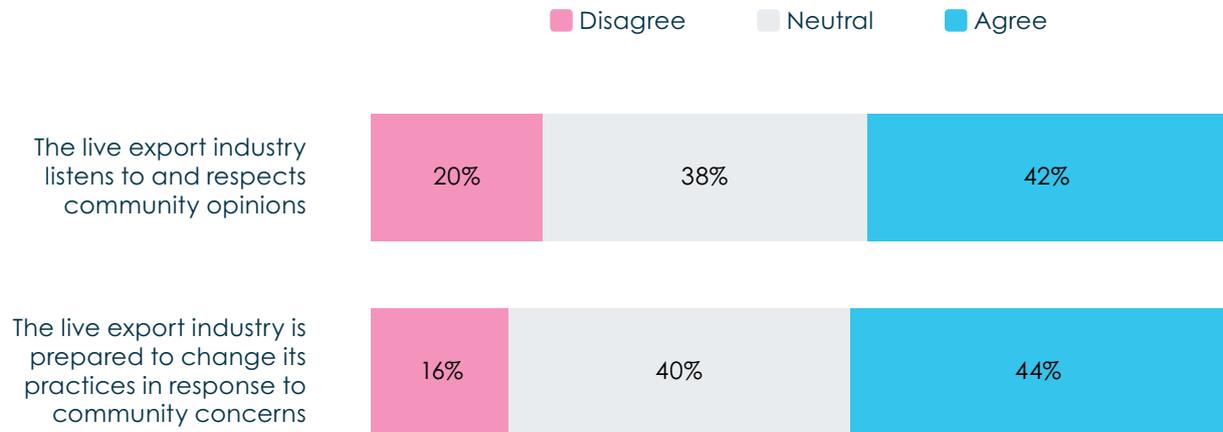


Figure 8. Percentage agreement and disagreement on industry responsiveness measures, 2024 pulse.

Key insights

Combined, these findings show a community that is increasingly positive about the live export industry's responsiveness. It is important for the live export industry to reflect on how the announcement of the closure date of live sheep export by sea, and changes in community engagement and media activity, have contributed to these perceptions, to harness the positive activity and engagement in future years.

“ I think if the public knew about what is happening to improve animal welfare it would be helpful.
– 2024 survey participant.

Industry information and the community

To better understand how the Australian community perceives information provided to them, a new block of questions was added to the 2024 anchor survey around communication. This new set of questions was repeated in the pulse survey, allowing a comparison to assist with understanding if the news cycle impacted community perceptions between the two surveys.

The strongest response for both surveys was to the question "the information I see about the live export industry often portrays it in a negative light" (anchor = 70%, pulse = 66% agreement; Figure 9) indicating a slight ease on the perception of information directly after the announcement of the closure date of live sheep exports by sea. 38% of respondents in both surveys saw the information as accurate (22% disagreed, 40% neutral).

Notably, when asked if they actively seek information about the live export industry, 16% agreed in the anchor compared to 26% in the pulse, representing a 10% increase between the two surveys (Figure 9). Reflecting on the context, this begs the question of whether increased media activity or a change of narrative sparked an interest in seeking information about the live export industry in the Australian community and highlights a gap for future research. Whatever the reason, this provides new opportunities for the industry to reach out to the public and broaden the conversation around issues that are important, like animal welfare.

“ Really this issue needs more media attention to keep public informed. – 2024 survey participant.

“ I think more information needs to be available to the general public about live export. – 2024 survey participant.

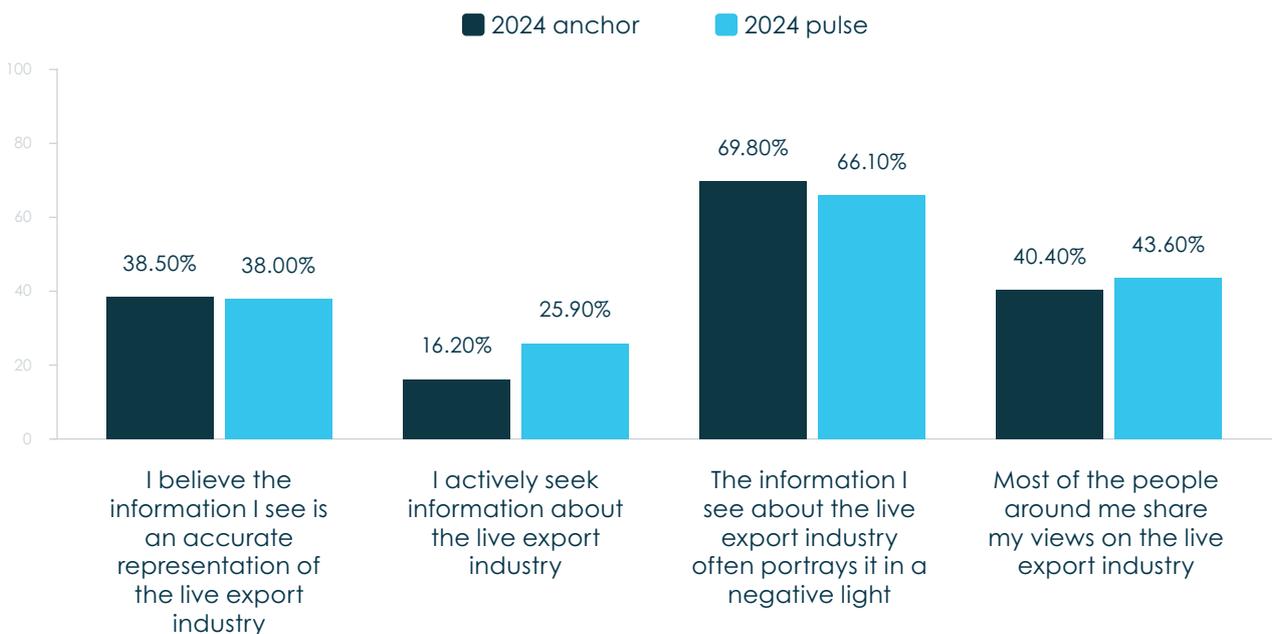


Figure 9. Percentage agreement on information questions, 2024.

New questions were introduced in June's pulse survey to further explore information sources and community sentiment. Australians responded well above the midpoint when asked if there should be more balanced coverage presenting both pros and cons to help inform people about the live export industry (PM=3.9; Figure 11).

More people agreed that news reports about the industry are sensationalised or exaggerated than disagreed, with an average score of 3.41. Still above the midpoint with a score of 3.36 was the extent to which people agreed that their perception of the live export industry has been influenced by the media (Figure 11).

More people rely on traditional news (PM=3.58) than social media (PM=2.62) for information about the industry and gave a mean score just above the midpoint of 3 (3.13) when asked if they trusted the source of their information (Figure 11).

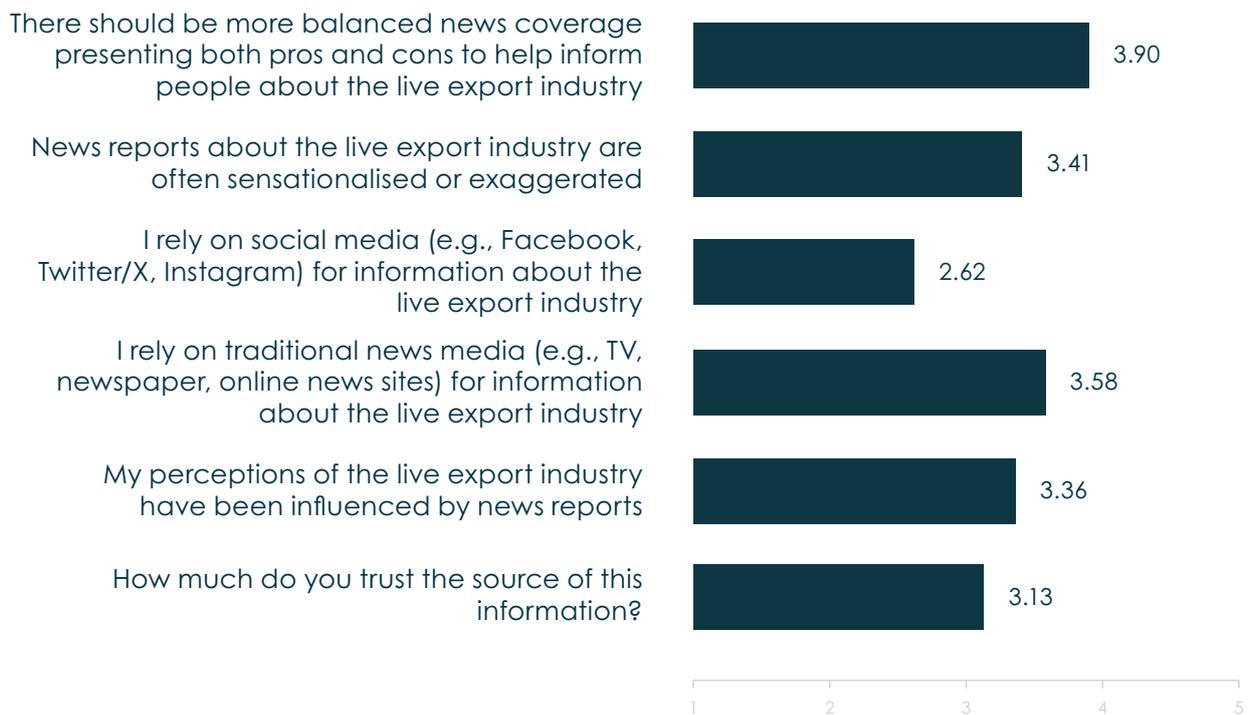
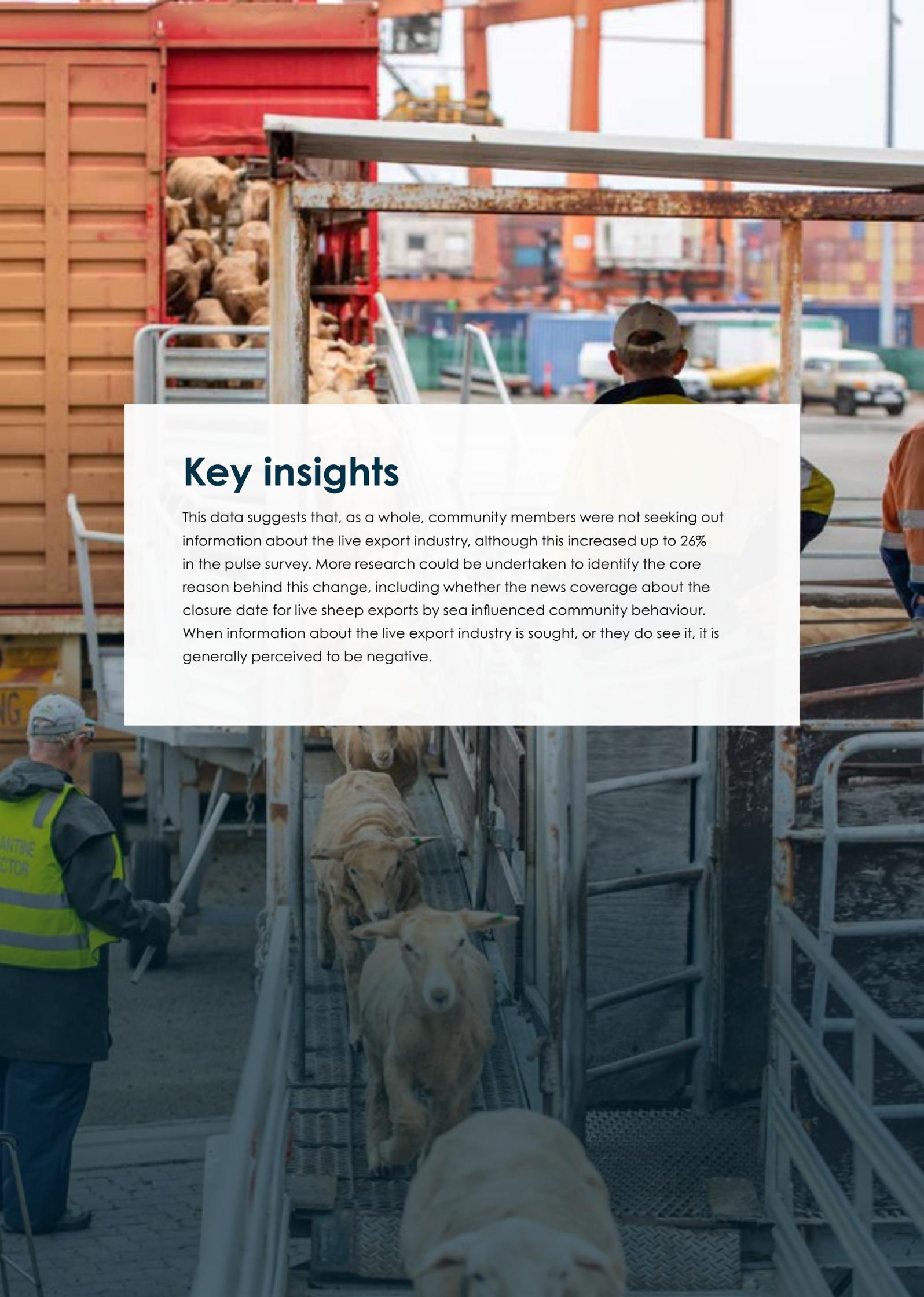


Figure 11. Ratings of agreement (means out of 5) on new information source questions, 2024 pulse.

A photograph showing a sheep pen with several sheep. A worker in a high-visibility vest and cap is visible on the left, holding a long pole. The background shows a large industrial building with orange structural elements and a white truck. The scene is outdoors, likely at a port or processing facility.

Key insights

This data suggests that, as a whole, community members were not seeking out information about the live export industry, although this increased up to 26% in the pulse survey. More research could be undertaken to identify the core reason behind this change, including whether the news coverage about the closure date for live sheep exports by sea influenced community behaviour. When information about the live export industry is sought, or they do see it, it is generally perceived to be negative.

Regulation

The regulatory mechanisms that ensure standards are being met are critical in agricultural industries, and in particular in animal industries. The community finds comfort in the assurance that standards are being met, and that there are reasonable consequences for nonconformance. This year, regulation was a significant driver of trust in the live export industry.

When participants were asked in the anchor survey to rate the extent to which “regulators of the live export industry are able to hold the industry accountable”, 46% agreed with this statement. This was a significant decline from 2023 (Figure 12). However, agreement increased in the pulse survey, at 52%, in line with the longer-term trend. 33% of participants were neutral and 15% disagreed with the statement (Figure 13).

Half of all participants agreed that standards developed for the live export industry ensure that people within the industry do the right thing (Figure 13). 47% of participants agreed that live export is regularly audited, with 39% responding neutrally (Figure 13). An additional factor in these results is a low self-rated knowledge around the regulatory systems in place. In 2024, 60% of anchor survey participants were in agreement that they didn't know how the live export industry is regulated (Figure 12), and while this decreased to 55% agreement in the pulse, neutral responses remained strong at 31% (Figure 13).



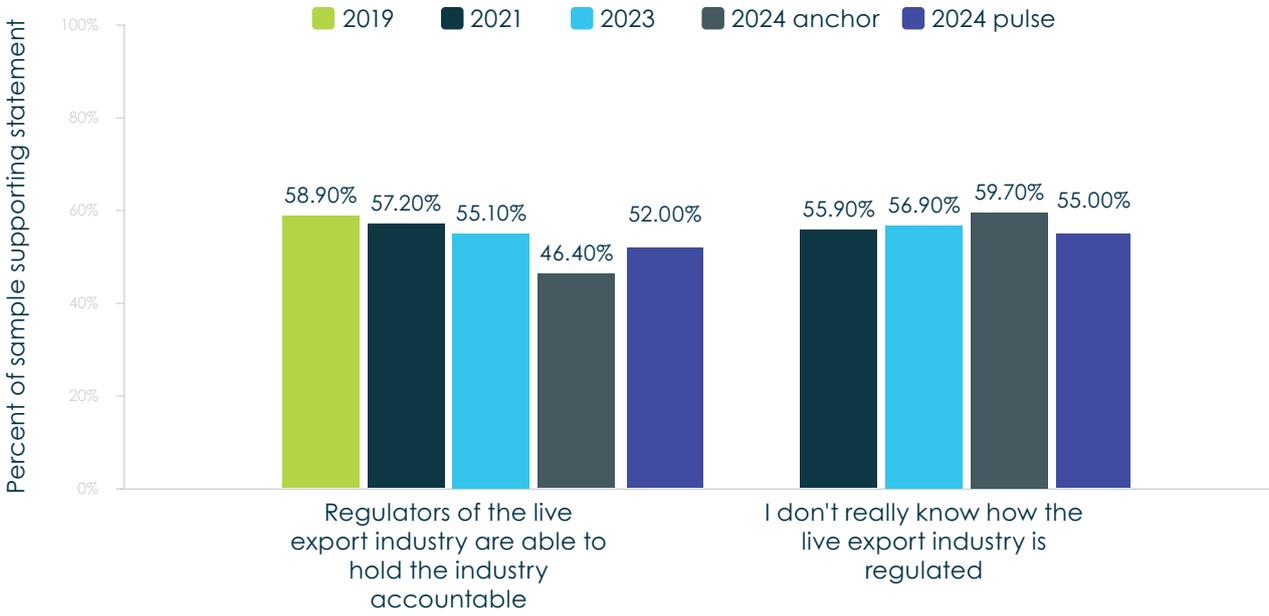


Figure 12. Percentage agreement on regulation questions, 2019-2024.

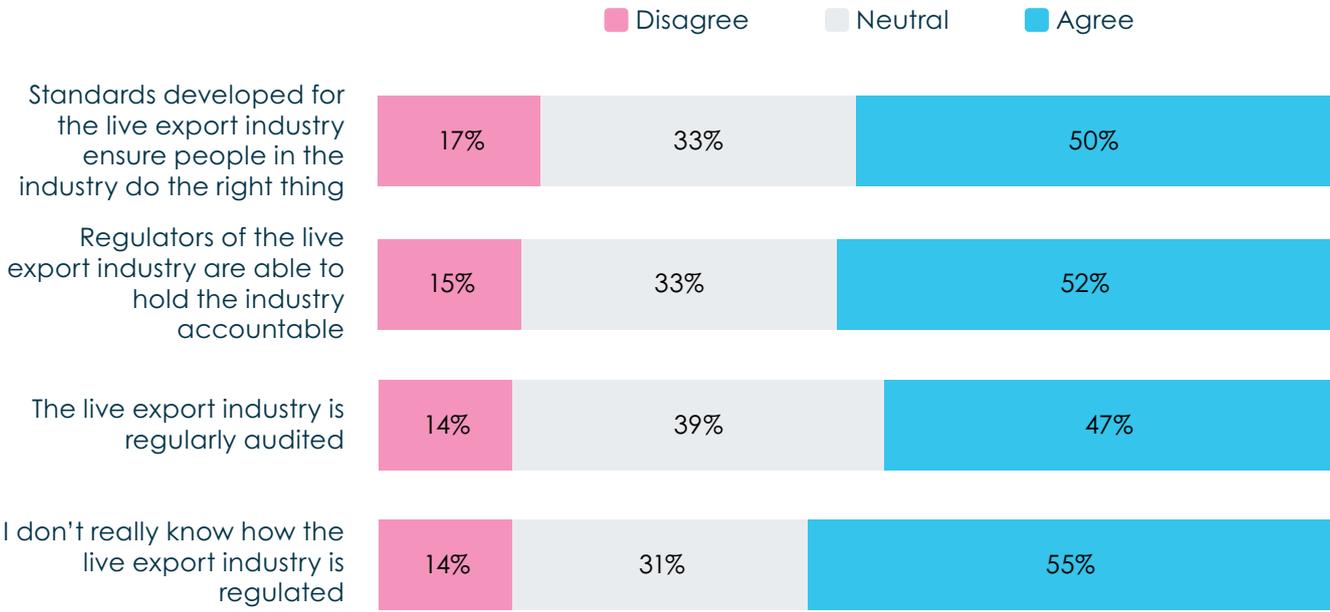


Figure 13. Distribution of agreement and disagreement on regulation questions, 2024 pulse.

Key insights

The data highlights that confidence in regulation is a critical driver of community trust. A key challenge to unlocking this driver is low knowledge about regulation in the general community.

“ I care very much about the treatment and well being of these animals, and although I think we do have standards we adhere to, there is always room to improve.
– 2024 survey participant.

Walking together on welfare

Animal welfare continues to be a critical area of focus for the live export industry. Community concerns around this issue are complex and captured across a series of questions.

The perception of animal welfare for the broader Australian community has continually moved towards an understanding of its complex nature. For example, when presented with the statement “the welfare of animals is not just about the absence of harm to them”, 71% of the Australian community agreed in the 2024 anchor survey. This has increased over the three years this statement has been included. Additionally, 74% of Australians agreed that “animal welfare in the live export industry is a complex issue” (Figure 14).

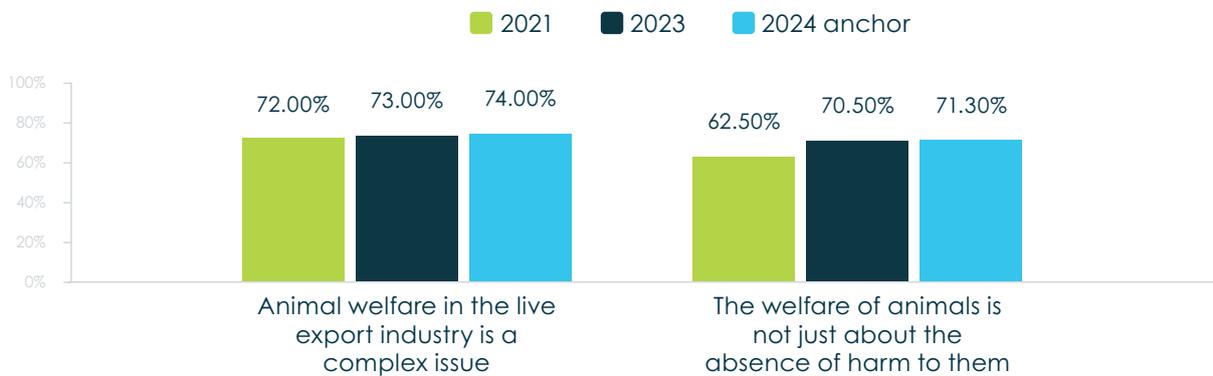


Figure 14. Percentage of agreement on animal welfare questions, 2021-2024.

When asked if they have confidence that the live export industry is taking effective action to ensure the welfare of animals, just under half of participants (45%) supported the statement in the anchor survey (Figure 15), a decrease compared to the 2023 baseline (49%). The question was repeated in the pulse survey to better understand if this was a symptom of the context in which the data was captured. Agreement increased beyond the 2023 baseline to 56% (Figure 16).

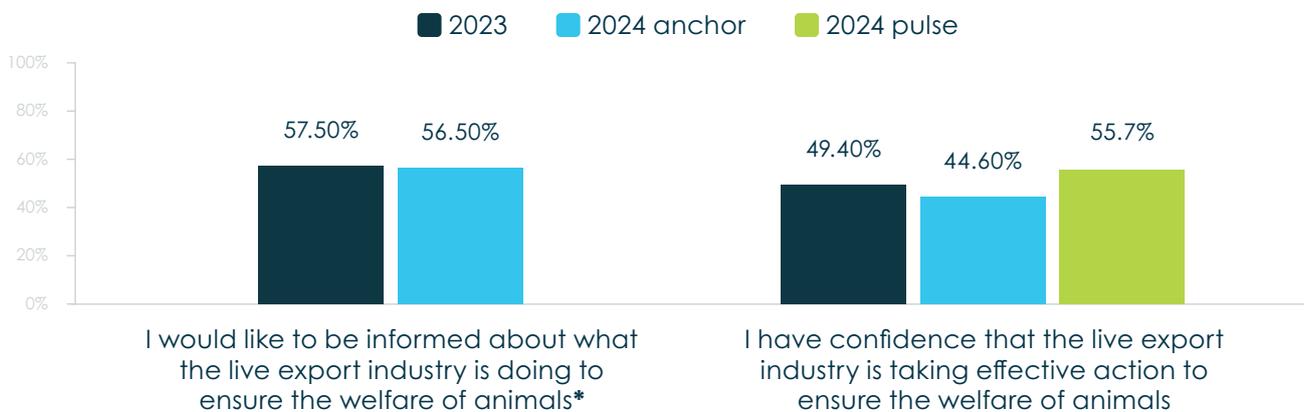


Figure 15. Percentage agreement on confidence questions, 2023-2024.

*note, the 2024 pulse did not ask this question

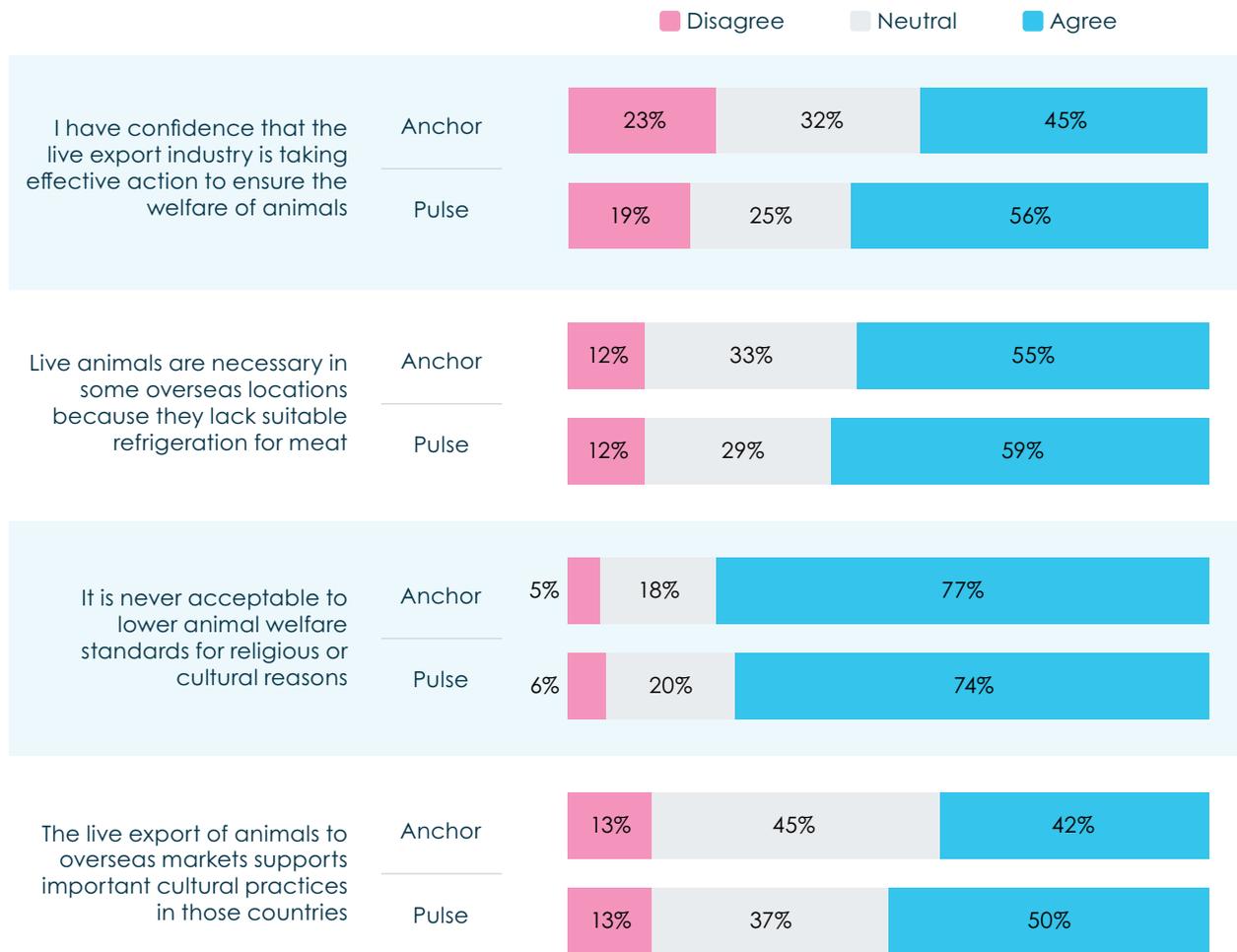


Figure 16. Percentage of agreement and disagreement on animal welfare questions, 2024 pulse.

Finally, animal welfare at destination continues to be a common concern. Consistent with 2023, 77% of anchor survey participants this year agreed or strongly agreed that "It is never acceptable to lower animal welfare standards for religious or cultural reasons" (AM=4.12). However, there was also strong acknowledgment that live exports have an important role in animal welfare internationally, with 45% agreeing that the live export industry exports animal welfare know-how and technology as well as livestock (13% disagree, 44% neutral), 58% agreeing that applying animal welfare standards to our animals when sold overseas improves animal welfare standards in those countries (12% disagree, 30% neutral), and 55% agreeing that it addresses a lack of suitable refrigeration options overseas (12% disagree, 33% neutral) (Figure 16).



Key insights

The Australian community has the ability to understand the nuanced environment in which the live export industry operates when it comes to animal welfare. The community also sees the value of live exports to those in other countries. This understanding allows for an open conversation with the community, who is willing to listen and understand the perspectives of the industry.

Perceptions of transit

In addition to general welfare, our research has highlighted ongoing concern by sections of the community about the way animals are transported to overseas markets. Just under half of anchor survey participants (47%) supported the statement that the way animals are transported to overseas markets bothers them (29% neutral, 24% disagree). This percentage has decreased significantly by 10% since the baseline measure in 2019 (57% agree).

To better understand this concern, this year we investigated the perceptions of the community using qualitative comments from previous surveys to identify the key issues around welfare during voyages. Participants of both 2024 surveys were asked the same set of questions, and all items scored means above the midpoint of 3, underscoring that each issue, as identified by the community, continues to be of importance. In the anchor survey, the top three items of concern for the Australian community when considering live animal transport on ships were: access to fresh air (AM=3.7), availability of food and water (AM=3.68), and temperature control (AM=3.62).

These concerns may have been influenced by media coverage of a heat wave in Perth while a live export ship was just off the coast, at the time data was being collected. The item of lowest concern was “the number of animal deaths on ships” (AM=3.28) (Figure 17).

In comparison, the top three items of concern during the pulse survey were the number of animal deaths on ships (PM=3.58); maintaining temperature control on ships (PM=3.54) and access to fresh air (PM=3.52). The item of lowest concern was the amount of space available during transport by sea (PM=3.31) (Figure 17). This shift is potentially related to increased public scrutiny of the live export industry following the announcement of a closure date for live sheep exports by sea, including news coverage discussing historical animal deaths during transit.

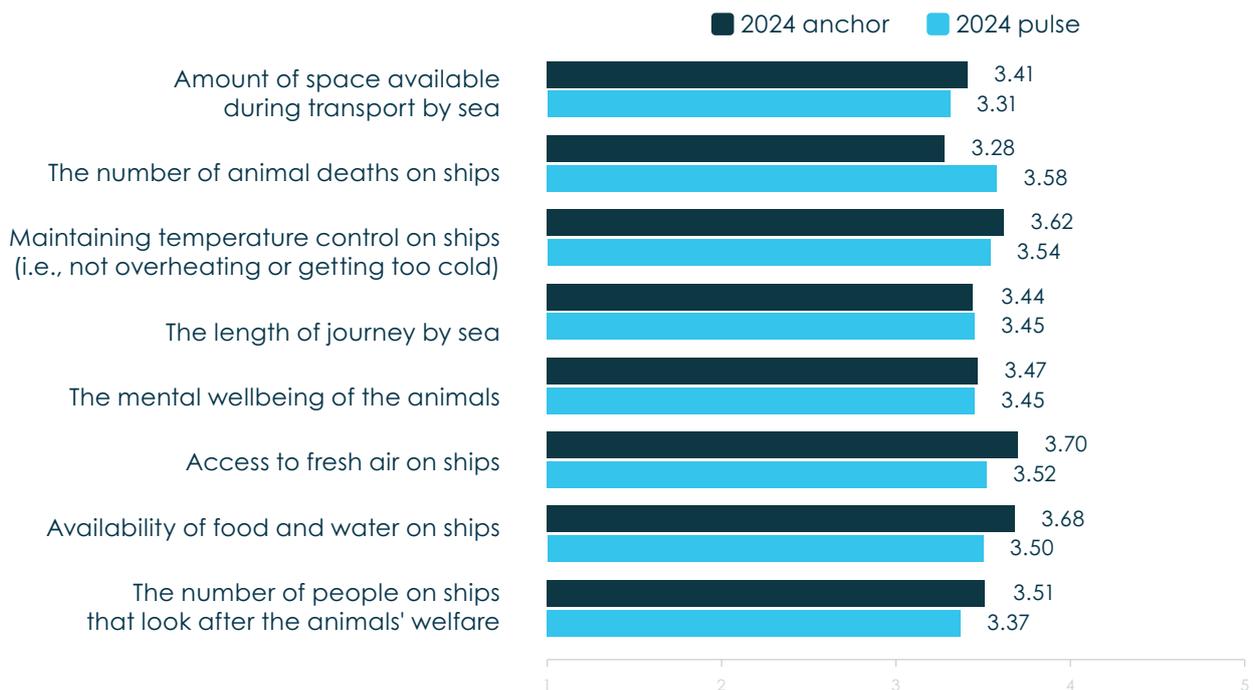


Figure 17. Rating of agreement (means out of 5) of voyage questions, 2024.

To better understand concerns around animal mortality on ships a series of questions has been included through the course of this research program. In the 2024 anchor, when asked to rate their level of agreement with the statement “the average number of live export deaths is acceptable to me”, 41% of participants disagreed or strongly disagreed, 27% were “neutral” and 32% agreed or strongly agreed. The mean for these answers was below the midpoint and represents an average disagreement with the statement. However, 40% of participants agreed or strongly agreed that “It doesn't matter to me how many animals die on a live export voyage, one death is too many”, with 34% disagreeing and 26% “neutral”. Notably, agreement with the first item and disagreement with the second item continue their trend of increasing over time (Figure 18).

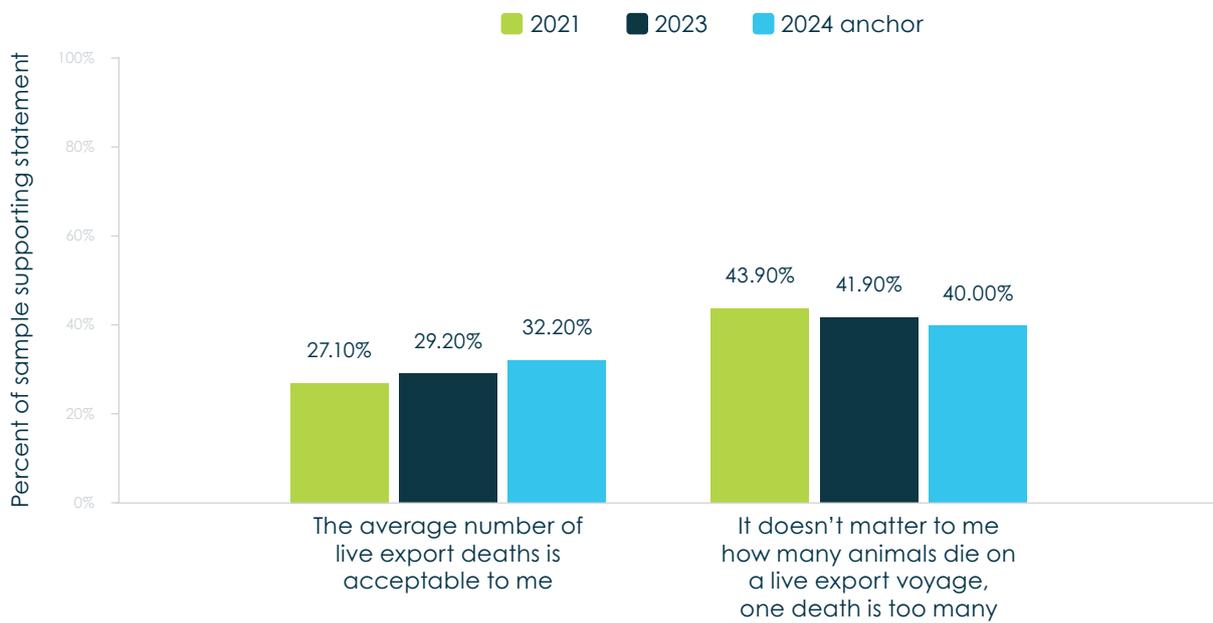


Figure 18. Percentage agreement, animal deaths on voyage questions, 2021-2024.

When asked about their perceived knowledge, 60% of anchor participants agreed with the question "I don't really know how animals are treated on live export ships".

To delve deeper into their understanding, we first asked participants "What is your best guess for how many sheep, on average, die on a typical 17-day live export voyage to the Middle East?". Six options were provided: 1, 7, 14, 21, 52 and 104 in 10,000 animals, where the correct answer was 14 in 10,000 animals for 2023 mortality rates⁴. Last year, there was a fairly even spread of answers; however, more of this year's anchor participants responded with higher estimates of the number of deaths.

Participants were then presented with information regarding the actual number of sheep deaths on sea voyages to the Middle East and asked to rate extent to which this met their expectations. Of the responses, 45% identified the mortality rate to be "lower" or "much lower" than expected, 38% noted it met expectations and only 18% answered that it was "higher" or "much higher" than expected. This represents a shift from 2023 responses, whereby more respondents noted it meeting their expectations rather than being greater than expected. This could be partially explained by the higher number of deaths estimated in the 2024 survey (lower chance of the answer being "higher or much higher than expected" if the estimate was higher in the first instance; Figure 19).

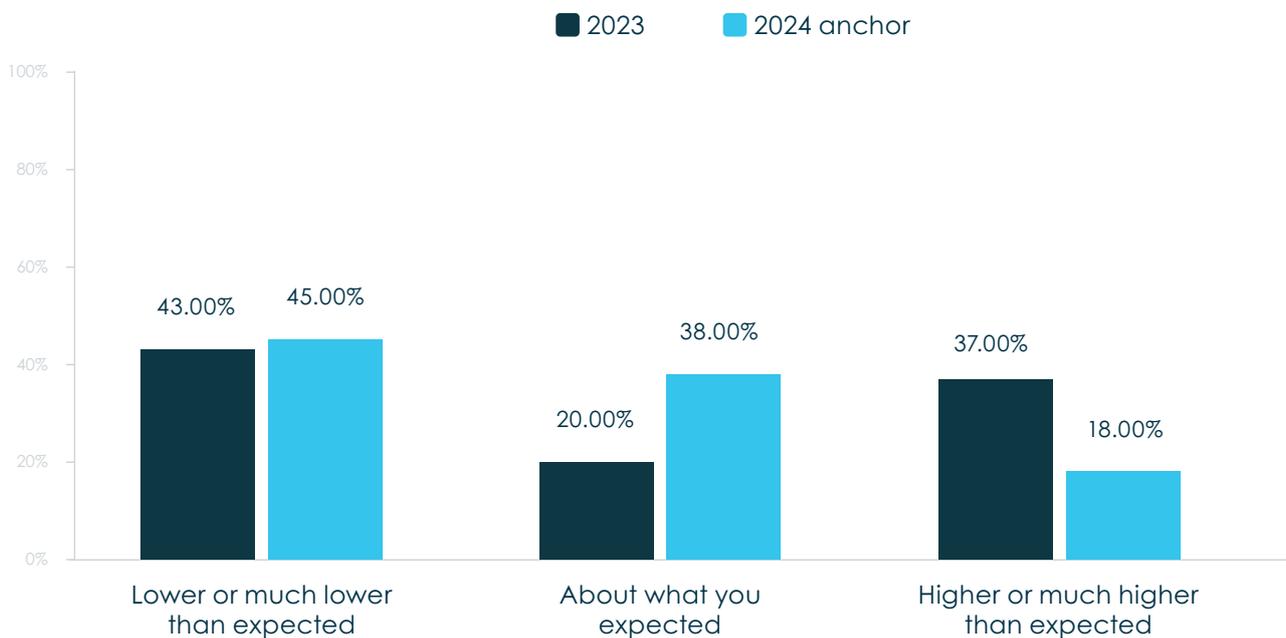
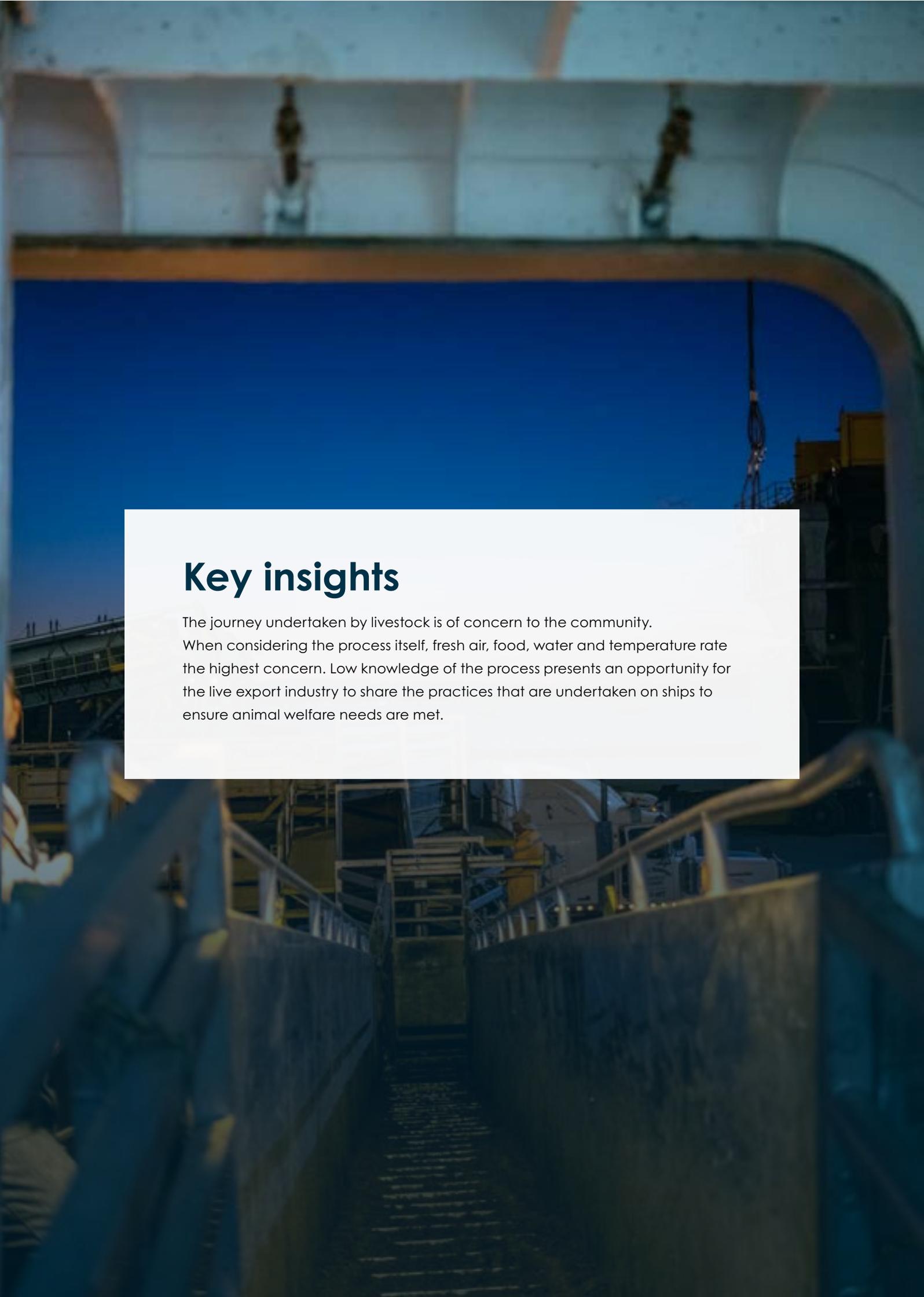


Figure 19. Percentage responses, expectation of sheep mortality question, 2023-2024.

⁴ Department of Agriculture, Fisheries and Forestry. (2023). Reports to Parliament. Retrieved June 15, 2024 from <https://www.agriculture.gov.au/biosecurity-trade/export/controlled-goods/live-animals/live-animal-export-statistics/reports-to-parliament>

The background image shows a ship's deck at night, illuminated by artificial lights. A white rectangular text box is overlaid on the left side of the image. The text box contains the title 'Key insights' and a paragraph of text. The ship's structure, including railings and stairs, is visible in the foreground and background.

Key insights

The journey undertaken by livestock is of concern to the community. When considering the process itself, fresh air, food, water and temperature rate the highest concern. Low knowledge of the process presents an opportunity for the live export industry to share the practices that are undertaken on ships to ensure animal welfare needs are met.

Sheep

Following the Australian Government commitment to phasing out live sheep exports from Australia by sea, last year we began investigating the perceptions of the community on live sheep exports specifically, through a series of questions which we continued into the 2024 survey.

When comparing mean responses across the three questions asked in the 2024 anchor to examine attitudes toward the export of sheep (Figure 20), respondents were more broadly accepting of the ability for the live sheep export industry to change their practices (AM=3.14) when compared to live exports in general (AM=3.11). When asked if the live export industry was moving in the right direction, more respondents agreed or strongly agreed on the general question (AM=3.32), compared to sheep (AM=3.22).

While agreement decreased for both live exports and sheep exports in 2024's anchor survey compared to 2023 (Figure 20), the ratings increased across all measures in the pulse survey to be equal to or above the 2023 results. The context of the 2024 anchor and the pulse environment relating to live sheep export here may be important; in particular news media coverage at both times.

When asked in the anchor survey how they felt about the costs and benefits of the live export industry overall and when considering the live export of sheep specifically, the majority of participants either said benefits outweigh costs (37% industry, 36% sheep), or were neutral on the matter (35% industry, 36% sheep), with the average rating remaining above the midpoint of the scale (i.e. the industry has net positive value; AM=3.11, industry; AM=3.08, sheep). This is consistent with the previous year's findings and shows that regardless of the animal type, the Australian community is weighing the costs and benefits and finding a net positive benefit for the live export industry (Figure 20). Furthermore, findings suggest that as with last year, there is not a statistically significant difference of perspectives when comparing live sheep export with live animal export.

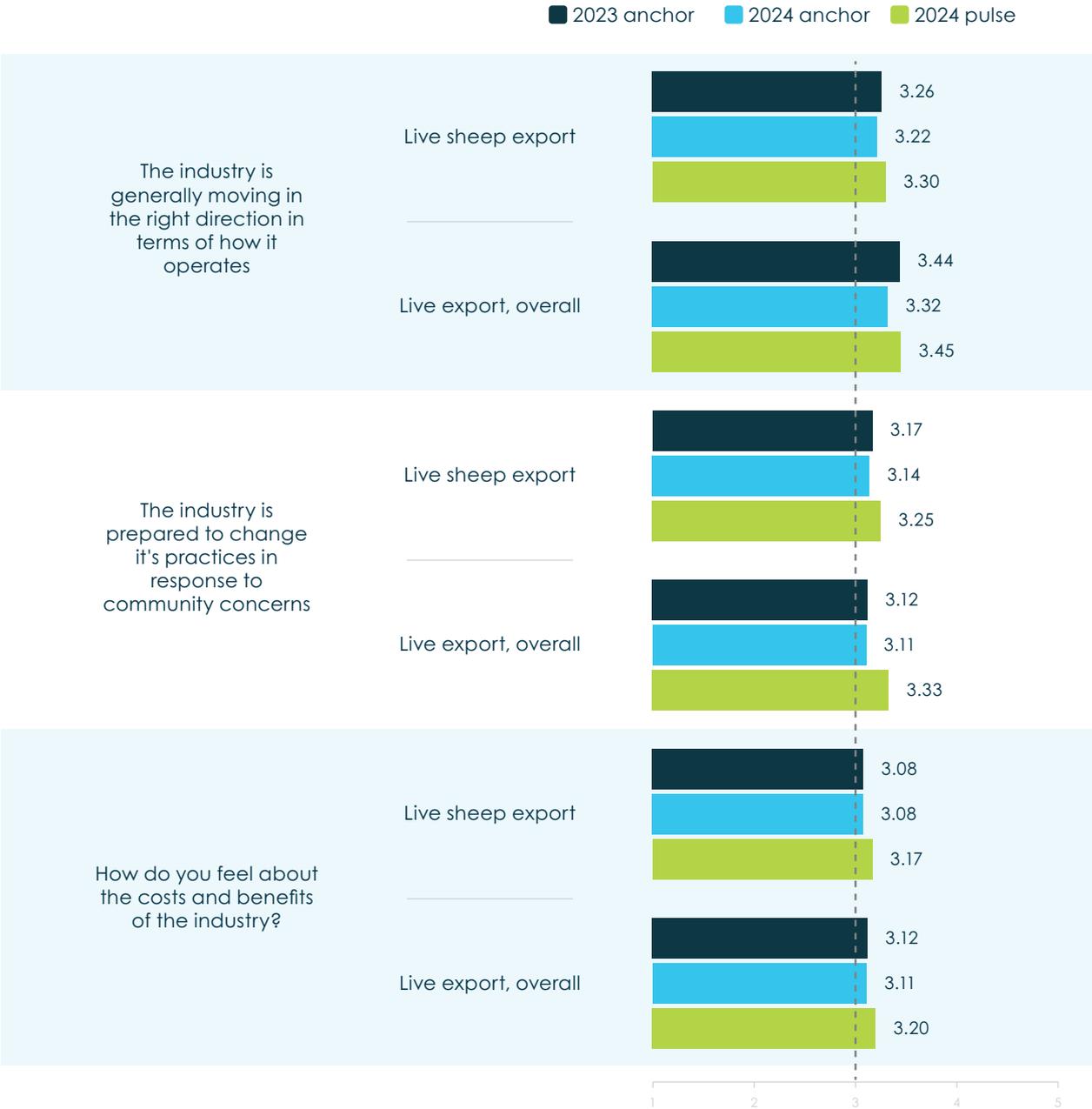


Figure 20. Ratings of agreement (means out of 5) for live animal exports compared to live sheep exports, 2023-2024.

LIVE EXPORTS AND THE AUSTRALIAN COMMUNITY

In 2024's pulse survey, we further investigated community sentiment towards live sheep compared to live export generally (Figure 21). Concerns on a series of questions have increased across the board compared to when they were first asked in 2023 for both sheep and live exports generally. Community members felt more strongly that conditions for animals on live export ships are not in line with Australian welfare standards (PM=3.44) compared to sheep (PM=3.33) in this year's pulse. Responses to stopping live export of animals or sheep regardless of the impact on Australian farmers has been stable over time, with similar ratings in 2023 (M=2.85, sheep; M=2.83, animals) and identical means in the 2024 pulse (PM=3.02, sheep; 36% agree, 28% neutral, 36% disagree; PM=3.02, animals 37% agree, 25% neutral, 38% disagree) (Figure 21).

More people agreed with the statement 'it doesn't matter to me if there is overseas demand for live sheep/animals, we shouldn't export them from Australia' in 2024's pulse (PM=3.08, sheep; PM=3.16, animals) than in 2023's baseline anchor survey (M=2.93, sheep; M=3, animals). Importantly, as shown in Figure 21, neutral scores across both measures in both years remained consistent, at 28-30%.



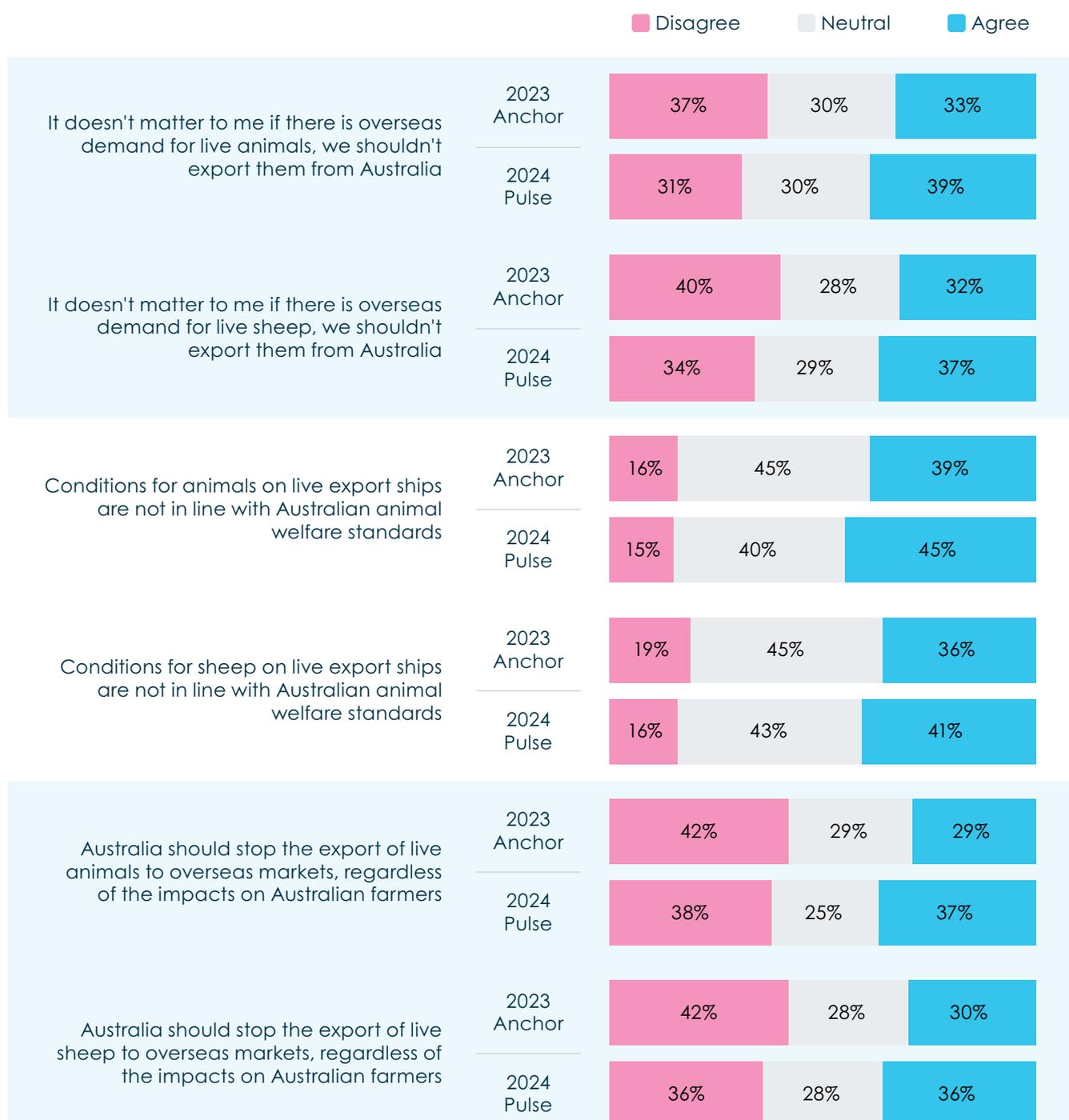
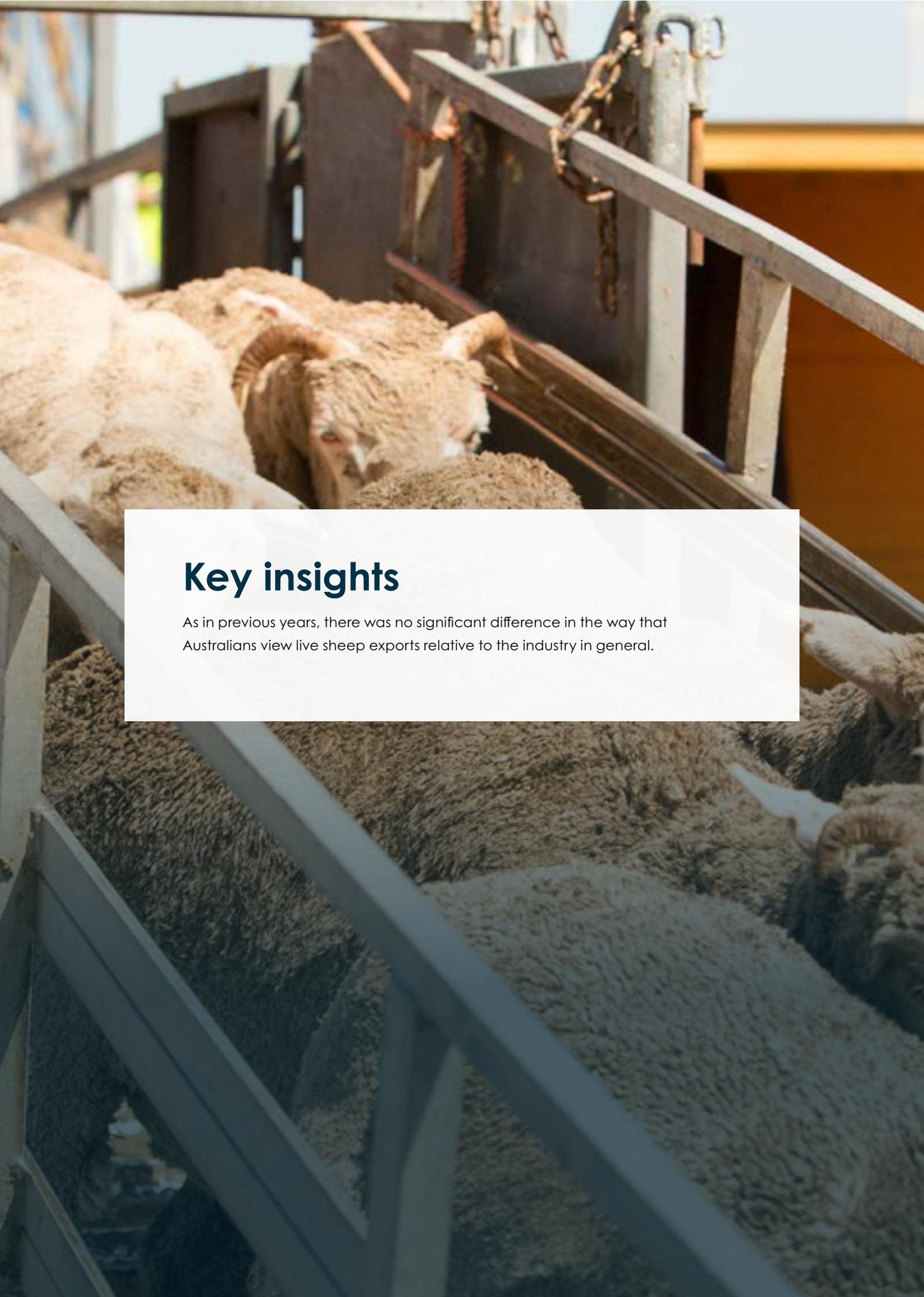


Figure 21. Percent of agreement on live animal exports compared to live sheep exports, 2023 anchor and 2024 pulse.

These questions on community sentiment regarding live sheep exports were not included in the 2024 anchor survey.

A photograph of sheep in a metal transport trailer. The sheep are packed closely together, and the trailer's metal structure is visible. A white text box is overlaid in the center of the image.

Key insights

As in previous years, there was no significant difference in the way that Australians view live sheep exports relative to the industry in general.

Building relationships through trust

Last year, we looked at ways in which to build acceptance. This year, through the information gained in both our anchor and pulse surveys, we will discuss the features that lead to increased trust. The models for 2023 and 2024 are similar and both reflect the complexity of the industry.

Understanding trust

Trust is central to the relationship between the live export industry and the Australian community. Trust acts a vehicle through which community expectations and experiences related to the live export industry can be translated, and directly influences community acceptance. As a result of this, focusing on trust building exercises and understanding the drivers of trust are crucial to strengthen live export's social licence to operate.

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

By looking at each individual driver of trust in the live export industry, we are able to understand what factors—in this case, which survey questions asked—are most important to each driver.

1. Procedural fairness

This speaks to the extent that Australians feel as if the live export industry is responsive to their concerns. This driver of trust is measured through two questions:

- The live export industry listens to and respects community opinions.
- The live export industry is prepared to change its practices in response to community concerns.

The more Australians feel as if the industry is proactive in this area and considering what matters most to the community, the more likely they are to trust live exports.

2. Regulation

Community perceptions of regulation are typically a translation of their confidence in standards, policies and laws to hold live exports accountable, ensuring that the industry is addressing what matters most to Australians. Regulation can also act as a more formal measure for the translation of community expectations of the industry and interest in its activities. Questions that factor into this driver of trust include:

- Standards developed for the live export industry ensure people in the industry do the right thing.
- The live export industry is regularly audited.
- Regulators of the live export industry are able to hold the industry accountable.

3. Animal welfare

Animal welfare has consistently been an important driver of community trust and acceptance for the live export industry. Questions that influence this driver include:

- Conditions for animals on live export ships are not in line with Australian animal welfare standards.
- The treatment of exported animals in overseas markets is not in line with Australian welfare standards.
- Animals on live export ships receive appropriate veterinary care on their journey.
- Australian animals are treated appropriately in the Australian live export industry.

These measures indicate that the community is particularly concerned around the industry's ability to meet Australian welfare standards. The more the industry is seen to actively meet animal welfare standards and treat animals for live export well, the more Australians will trust the industry.

4. Value of Australia's live export overseas

As with previous surveys, the extent to which the community perceives the industry to positively contribute to overseas markets is a significant driver of community trust in live exports. This includes factors related to:

- Ability to fill overseas market gaps.
- Imparting animal welfare know-how and technology to overseas countries.
- Improving the diet and nutrition of overseas countries.
- Quality of breeding stock.
- Securing safe food and ensuring food security.
- Supporting important overseas cultural practices.

5. Costs versus benefits of the industry

It is important to consider the value of the industry to the Australian public. The more they feel as if the benefits of the live export industry outweigh its costs to operate and manage, the more likely they are to trust and accept the industry. For the live export industry, costs versus benefits is a driver of acceptance, and is influenced by trust, industry importance, animal welfare and industry value overseas.

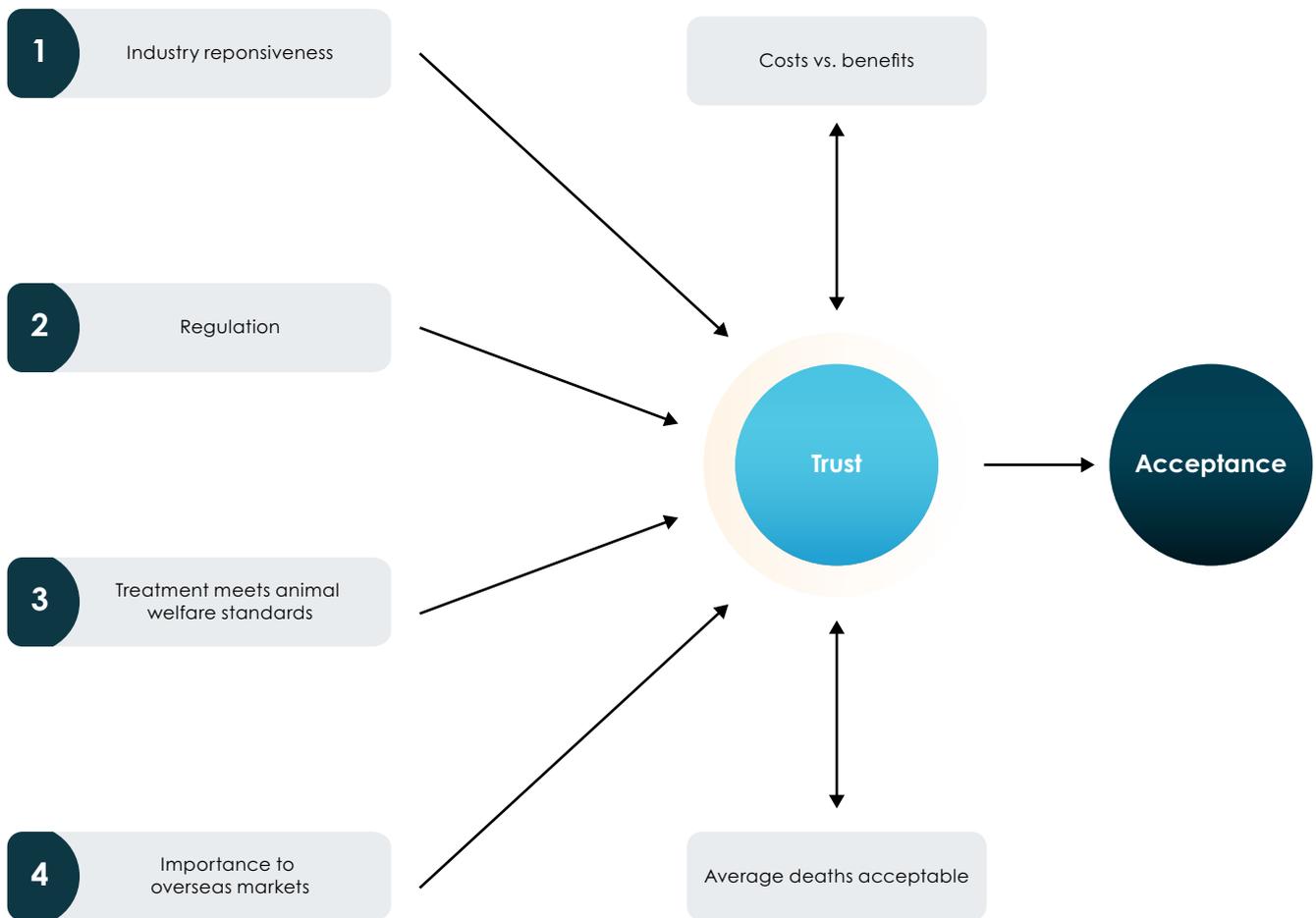


Figure 22. A stylised diagram of the 2024 acceptance path model for the live export industry.

How to read this path model

When reading the path model, follow the arrows from left to right. The direction of the arrow indicates the direction of the relationship; for example, greater trust leads to higher acceptance. The numbers represent the four items with the most significant impact, in order. All of the pathways in this model are positive, which means that higher scores on one measure lead to higher scores on the measure it is pointing at; for example, the more that community members feel animals are treated in line with Australian welfare standards, the more they trust the live export industry.

A little more about path analysis

The 2024 path model is shown in Figure 22. With a path model like this, we are seeking to understand how the topics and issues measured in the survey relate to each other and to the key outcome variable, in this case community acceptance of the industry. That is, where the rest of this report has focused on what community members think, this model is seeking to help us understand the patterns underlying why community members think the way they do. This type of analysis is very effective in laying out a plan for community engagement and outreach, internal development, and innovation, based on the needs and expectations of community members.

Before conducting the path analysis, we first determine how all the questions included in the survey relate to each other. Where several questions are found statistically to be measuring the same construct (i.e., the two different questions we used to measure industry responsiveness), we combine them to form a scale, averaging responses on this set of questions to form a single score.

These scales are then used in the path analysis, with one or more questions from the survey present in each of the boxes we can see in Figure 22. To answer a commonly asked question, this path analysis is calculated using the responses of community members to the questions that we ask them in the survey. There may be some complex math underlying a path analysis, but the specifics of these calculations aren't important; its effect should be to illustrate clearly and concisely what is most important in the relationship between an industry and the community it operates within, and on what areas an industry should focus to deepen this relationship.



Conclusion

The 2024 surveys of community sentiment towards the Australian live export industry provide a detailed and nuanced understanding of public perspectives. This year's findings indicate a complex and evolving relationship between the live export industry and the Australian community, marked by both enduring support and concerns.

The live export industry has experienced challenges this year, with the anchor and pulse surveys capturing this at two distinct points in time. Where the anchor revealed a downturn in sentiment, the pulse survey shows a notable recovery. This change highlights that social, economic and environmental context is critical to the community's perception of the live export industry.

Key insights from this research underscore the importance of animal welfare as a central issue for Australians. While there is recognition of the economic contributions of live exports, particularly to rural communities and the broader agricultural sector, concerns about the welfare of animals during transport and in overseas markets remain prevalent. Trust in the industry saw a brief decline in early 2024 reflecting the community's demand for greater transparency, stricter regulatory oversight, and more responsive industry practices. Trust increased during the pulse survey, demonstrating the community responded positively to industry efforts to meet these demands. The 2024 data also reveals that community trust and acceptance are closely linked to perceptions of industry responsiveness and regulatory competence. Australians expect the live export industry to adhere to high welfare standards and to be accountable for its practices, and respond positively when they perceive the industry is listening to and responding to these concerns. The findings suggest that enhancing awareness of regulatory frameworks and demonstrating genuine responsiveness to community concerns are critical pathways to continue building trust and securing the industry's social licence to operate.

This report highlights the significant role of communication in shaping community attitudes. There is an evident desire from the community for more balanced and informative coverage, both from the industry itself and wider news media outlets, that presents both the benefits and challenges of live exports. Engaging with the community through transparent, consistent, and empathetic communication can help bridge the gap between industry practices and public expectations.

Looking forward, the live export industry has the opportunity to leverage these insights to foster a more positive relationship with the Australian community. By continuing to prioritise animal welfare, working with regulatory measures, and actively listening to community voices, the industry can work towards greater trust and acceptance.

As we continue to monitor and analyse community sentiment, it is crucial for all stakeholders to engage in an ongoing dialogue, addressing concerns and highlighting improvements made within the industry. The future of the live export industry depends on its ability to adapt and evolve in response to the values and expectations of the Australian public.

In conclusion, this research provides a comprehensive baseline for understanding the current state of community sentiment towards live exports. It serves as a valuable resource for guiding industry practices, policy development, and stakeholder engagement. By embracing these findings, the live export industry can navigate the complexities of community trust and acceptance, ensuring its sustainability and relevance in the years to come.

Contact

Dr Kieren Moffat

Voconiq CEO and Co-founder

info@voconiq.com