VoconiQ
Engagement Science Insights

Community Trust in Grains - Focal Study

A National Survey

2024

CITATION

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VOCONIQ, OUR STORY

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

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ACKNOWLEDGEMENTS

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

INTRODUCTION

The Australian grains industry serves as an essential pillar of the nation's economy, contributing significantly to Australia's gross agricultural value (34% in 2022/23)[1]. As the industry grapples with the challenges of a changing climate and increasing demand, it also faces growing scrutiny regarding its ethical and environmental practices. Understanding public sentiment and addressing these concerns is pivotal for the industry to maintain its social licence and continue to grow.

This report aims to provide valuable insights to industry stakeholders, empowering them to navigate the complexities of a changing social landscape. By embracing key strengths such as value of workforce, sustainable practices, and innovative approaches within a context of a transparent and fair production system, the grains industry can build and maintain public trust while continuing to drive progress in Australia's agricultural sector.

This report builds on insights from the 2021 survey, highlighting new trends and shifts in public perception that have emerged in 2024. By comparing data from both surveys, we aim to provide a comprehensive understanding of community trust and acceptance in the Australian grains industry.

OVERVIEW OF KEY FINDINGS

In our first year of the Community Trust in Grains program, we heard from 2,876 Australians through our nationally representative survey. This is the first year of a three-year program of work, aiming to collect responses from over 6,000 Australians. Over time, this data set will help build a picture of the challenges the grains industry faces and help grow skills in those involved in the industry to improve their relationship with their communities based on trust.

Drivers of trust and acceptance

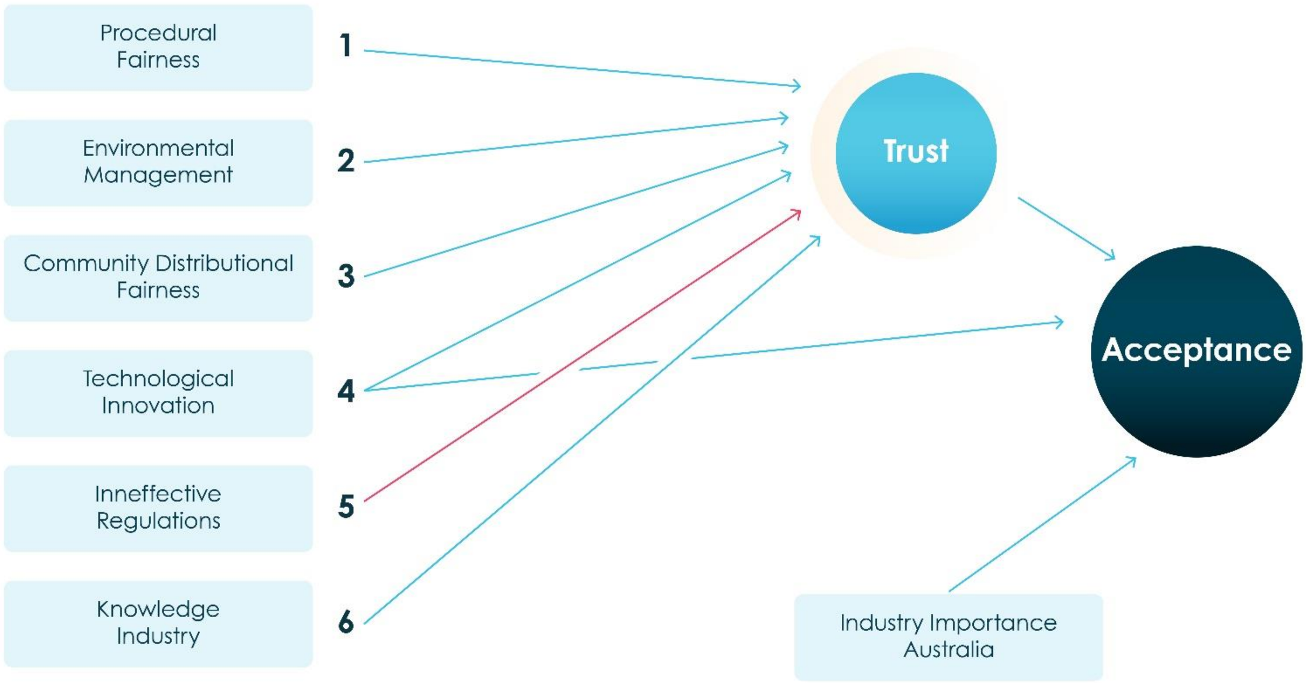
The key drivers of trust and acceptance in the Australian grains industry demonstrate what the community is concerned about most. In 2024, trust is the central driver of acceptance for the grains industry, where acceptance acts as a proxy for social licence to operate. Procedural fairness, (i.e., the extent to which community members feel the grains industry listens to community concerns and is prepared to act on them) is the strongest driver of trust and the second strongest driver of acceptance. How the industry manages its environmental impacts, the extent to which communities feel as if they receive a fair share of the benefits generated by the grains industry and their knowledge of the industry also drive trust. Technological innovations positively influence both trust and acceptance. When the community feel as if regulation of the grains industry is ineffective, the less likely they are to trust and accept the industry. Australians recognise the importance of the grains industry; the more the community perceive the industry to be important, the more they will accept the grains industry.

Comparative insights from the 2021 and 2024 reports

A comparative analysis of the 2021 and 2024 surveys reveals significant trends and shifts in public perception. New elements in the 2024 survey, such as attitudes toward plant-based

[1] https://grdc.com.au/about/our-industry

proteins and detailed environmental concerns, provide deeper insights into evolving community expectations.



WHY MEASURE TRUST?

Trust plays a vital role in the relationship between communities, stakeholders, and organisations. It involves individuals accepting vulnerability and depending on fair treatment from the other party. Building trust has practical advantages, as it leads to various positive outcomes. When a community trusts an industry, they are more likely to be understanding when issues arise, and they are more likely to offer support. On the other hand, lower trust can lead communities to view failures in a more negative light, potentially resulting in actions against the industry.

Trusted industries have more room for innovation and are better equipped to address challenges with their community and stakeholders. Trust is seen as an asset for industries as they seek to establish, strengthen, and improve acceptance of the industry (or, their social licence to operate).

Understanding what influences, enhances, or diminishes trust in these relationships is crucial. This research paper can be used as a tool to help identify opportunities to strengthen the relationship between industries and their community.

THE RESEARCH PROCESS

The research process was designed in line with previous work conducted for the grains industry as part of the Community Trust in Rural Industry program partnership with AgriFutures Australia and eight other RDC and industry partners. An online survey methodology was used to access the views of Australians over the age of 18 years. Using an online research panel to ensure a broadly representative sample of Australians by age and gender, participants were recruited across the country between 8 March and 2 April 2024. A total of 2,876 surveys were included for analysis after data cleaning.[2].

This research builds on the foundation established in the original 2021 study, aiming to compare current findings with the existing grains industry dataset. To ensure comparability, many questions from the 2021 survey were intentionally included, while others were slightly modified to reflect updated definitions and current contexts.

Alongside a comprehensive set of demographic questions, the survey measured community sentiment toward several key topics:

- Importance of the grains industry to the Australian way of life
- Self-rated levels of knowledge of the industry
- Environmental impacts and management
- Attitudes towards plant-based proteins
- The importance of grains industry products
- Drought, climate variability, and climate change
- Innovation in the grains industry
- Confidence in regulation and internal industry standards
- Industry responsiveness
- Trust in the grains industry
- Acceptance of the grains industry

Participants were provided with a clear definition of the grains industry, described as the sector in Australia that produces crops such as wheat, barley, oats, canola, and pulses (e.g., lentils), and manufactures products like bread, cereal, cooking oil, and animal feed. This definition ensured that respondents had a consistent understanding of the industry while answering the survey.

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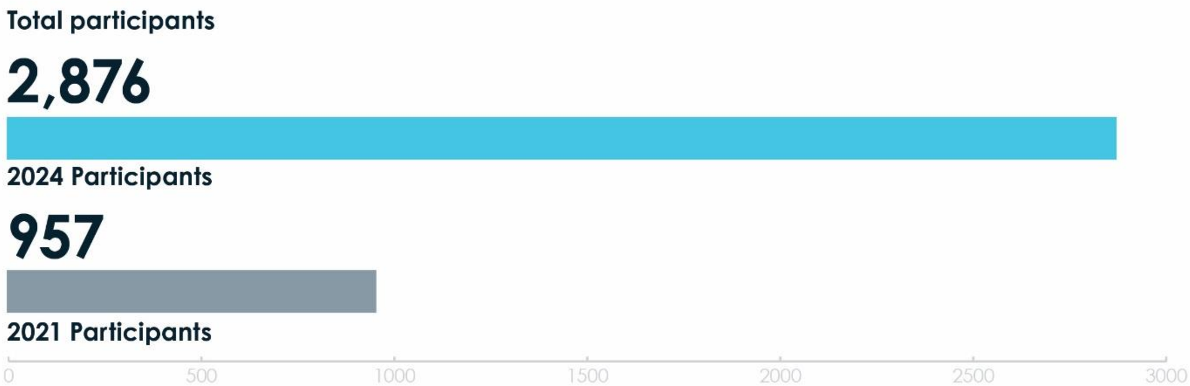
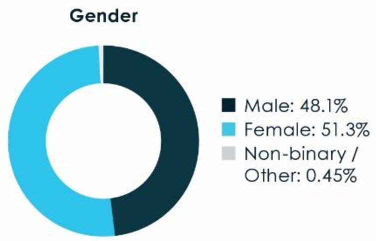
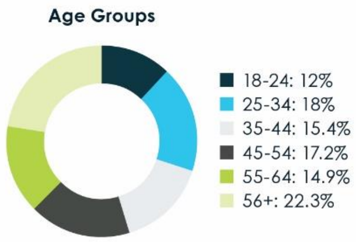
2 'Data cleaning' is conducted in order to ensure the quality of data included in analyses is high. This involves screening and potential removal of surveys where, for example, participants answered the survey very quickly (i.e. less than 5 minutes), in ways that indicate lack of attention to the content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

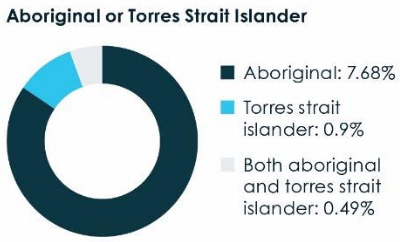
By maintaining continuity with the 2021 research, this study allows for a nuanced analysis of how community trust and attitudes toward the grains industry have evolved over time. This comparative approach provides valuable insights into the shifting priorities and concerns of the Australian public, helping to guide future strategies for industry engagement and sustainability initiatives.

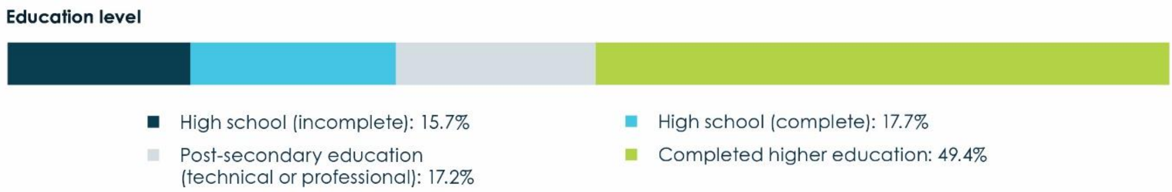
WHO COMPLETED THE 2024 SURVEY?

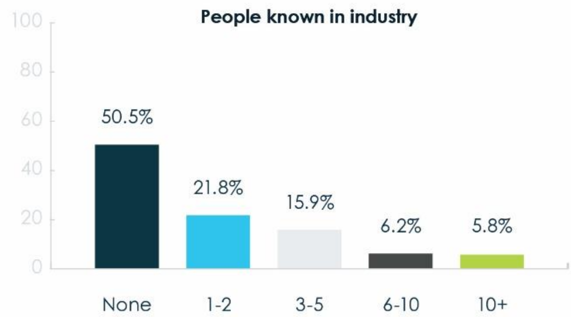


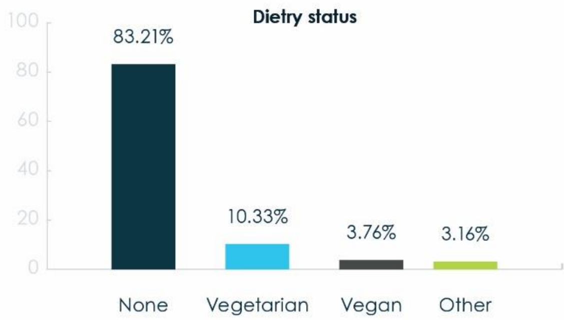


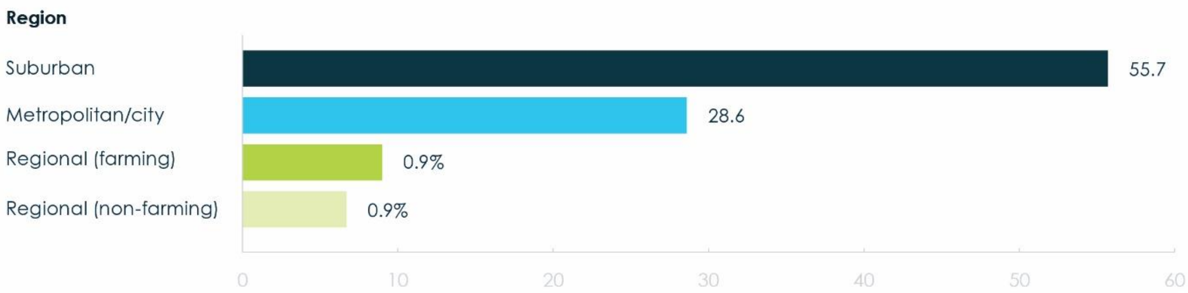












POSITION OF THE GRAINS INDUSTRY IN AUSTRALIA

In our research, we are exploring the connection between the Australian grains industry and the Australian community as a whole. We aim to understand the key interactions between the industry and the community, as well as grasp the collective and individual perspectives and sentiments within the community.

Our research emphasises the powerful bond between the community and the Australian grains industry, reflecting the widely held belief that the industry significantly impacts both the overall and regional way of life. An overwhelming 86% of participants agreed or strongly agreed that the grains industry is vital to our (Australia's) way of life. Similarly, the same percentage acknowledged the important role played by the grains industry in the regional communities where it operates; 84% of participants concurred that the grains industry contributes to the generation of significant local jobs in regional areas (Figure 1).

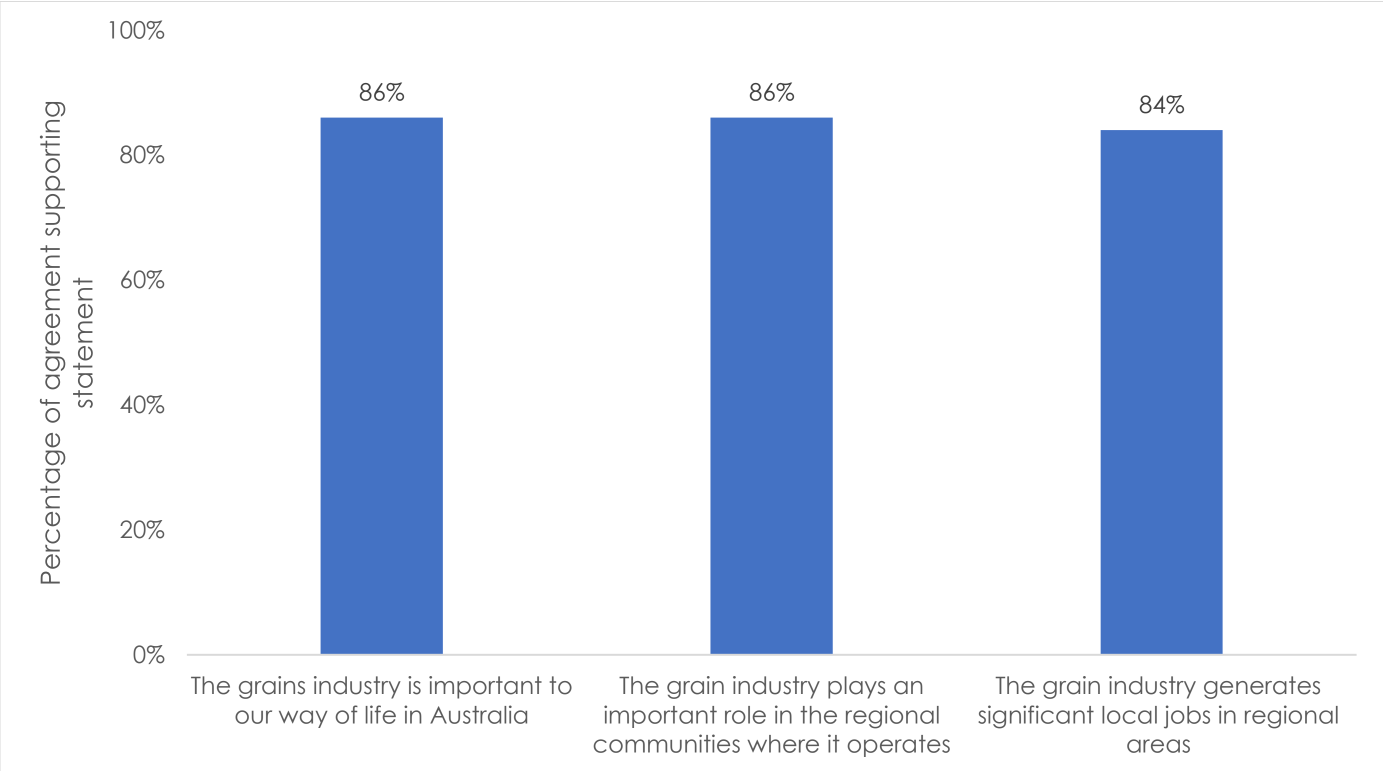


Figure 1: Proportion of agreement on importance of the grains industry.

'Trusting the grain growing industry is important for Australia" – 2024 survey participant.

The majority of Australians recognise the vital nutritional value that grains bring to the Australian diet (88%; Figure 2), and 88% of participants acknowledged that the grain industry provides staple food products for Australia. Furthermore, 85% agree that the grain industry plays a crucial role in creating important export products for Australia. This widespread agreement underscores the significant impact of the grain industry on the Australian diet, as well as its contribution to the country's economy and culture.

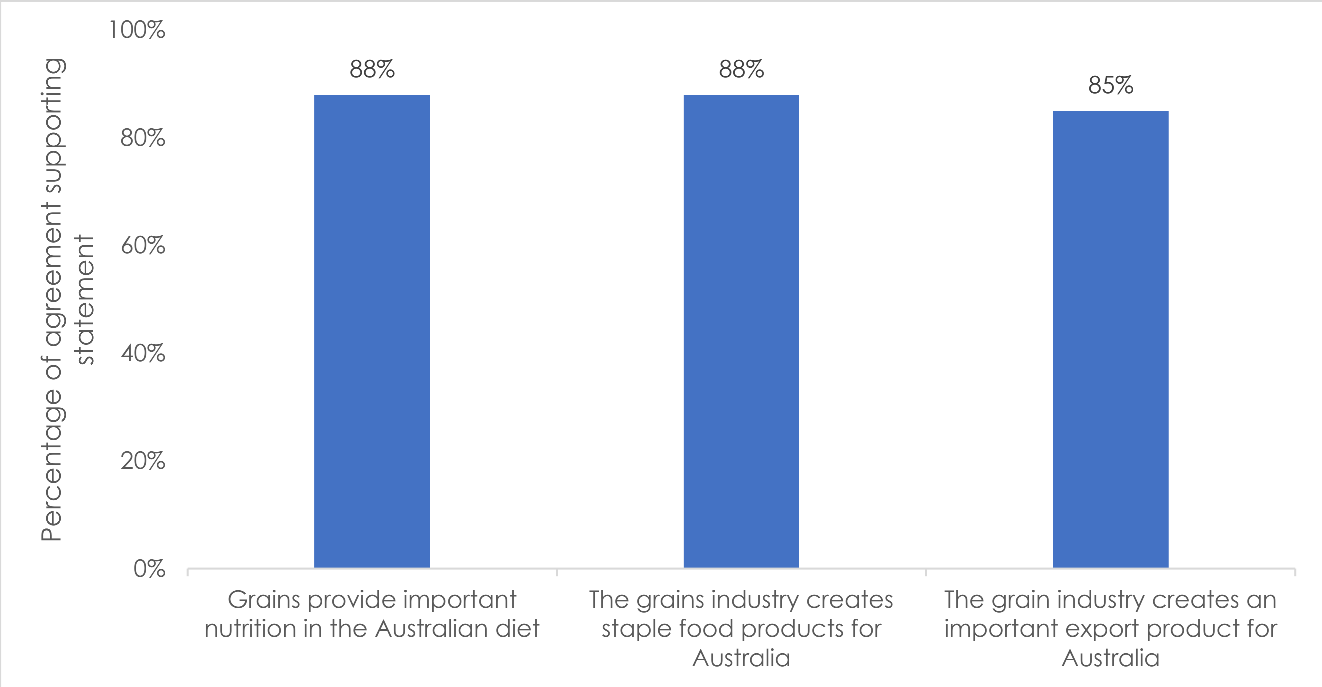


Figure 2: Proportion of agreement of the importance of grain industry products.

A key measure of the relationship between the grains industry and the Australian community is trust in and acceptance. Both trust in and acceptance of the grains industry is strong and there is evidence of the relationship improving from our original measure in 2021.

In 2024, trust in the Australian grains industry remains robust. On a scale from 1 (Not at all) to 5 (Extremely), the average level of trust in the industry to "act responsibly" is 3.32, maintaining the strong position identified in the 2021 study (M=3.30). This rating, being above the midpoint, underscores a solid relationship with the community. Notably, when asked about trust overall, grain growers are particularly trusted, scoring 3.48, while the GRDC and the industry overall received scores of 3.31 and 3.34, respectively.

The average level of acceptance of the grains industry in 2024 was 3.6, measured on the same 5-point scale. In the previous survey conducted in 2021, this score was 3.5, indicating that acceptance of the grains industry has increased slightly over time.

We then asked questions regarding three key dimensions of trust, humility, integrity and competence. When asked questions relating to trust in the industry (Figure 3), 44% of participants stated they the grains industry to act responsibly either 'very much' or 'extremely.' When asked if they 'trust the Australian grains industry to value the needs and desires of people like me' just under half of all participants (48%) indicated their level of trust to be 'very much' or 'extremely'. Slightly more Australians (52%) agreed that they trust the Australian grains industry to be the best at what they do. These results show high confidence from the Australian community overall about the competence, humility and integrity of the Australian grains industry.

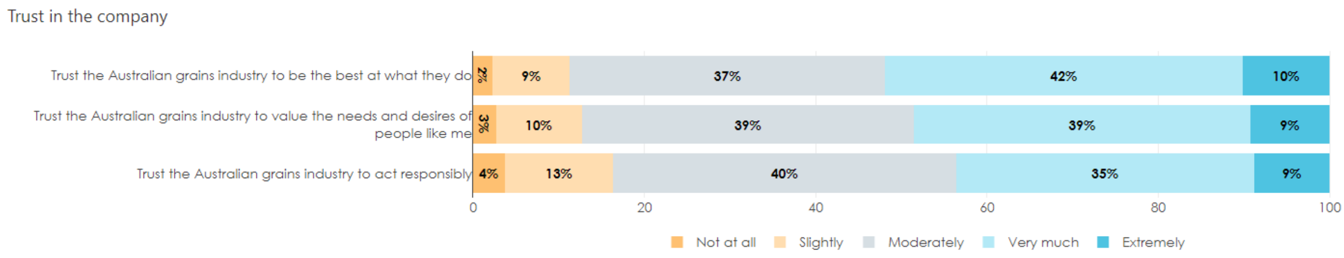


Figure 3: Distribution of scores on trust in the Australian grains industry.

To better understand the relationship the Australian community has for each group within the grains industry, we asked a series of trust-in-context questions (Figure 4, below). Reviewing the means, there is a range of scores, highlighting that there are different opportunities that each institution has to build a relationship with the Australian community, and importantly that those who grow the product are the most trusted group overall. In a later section of this report, we provide a summary of more advanced data modelling that shows how trust and acceptance relate to the industry, and what else influences community acceptance of grains in Australia.

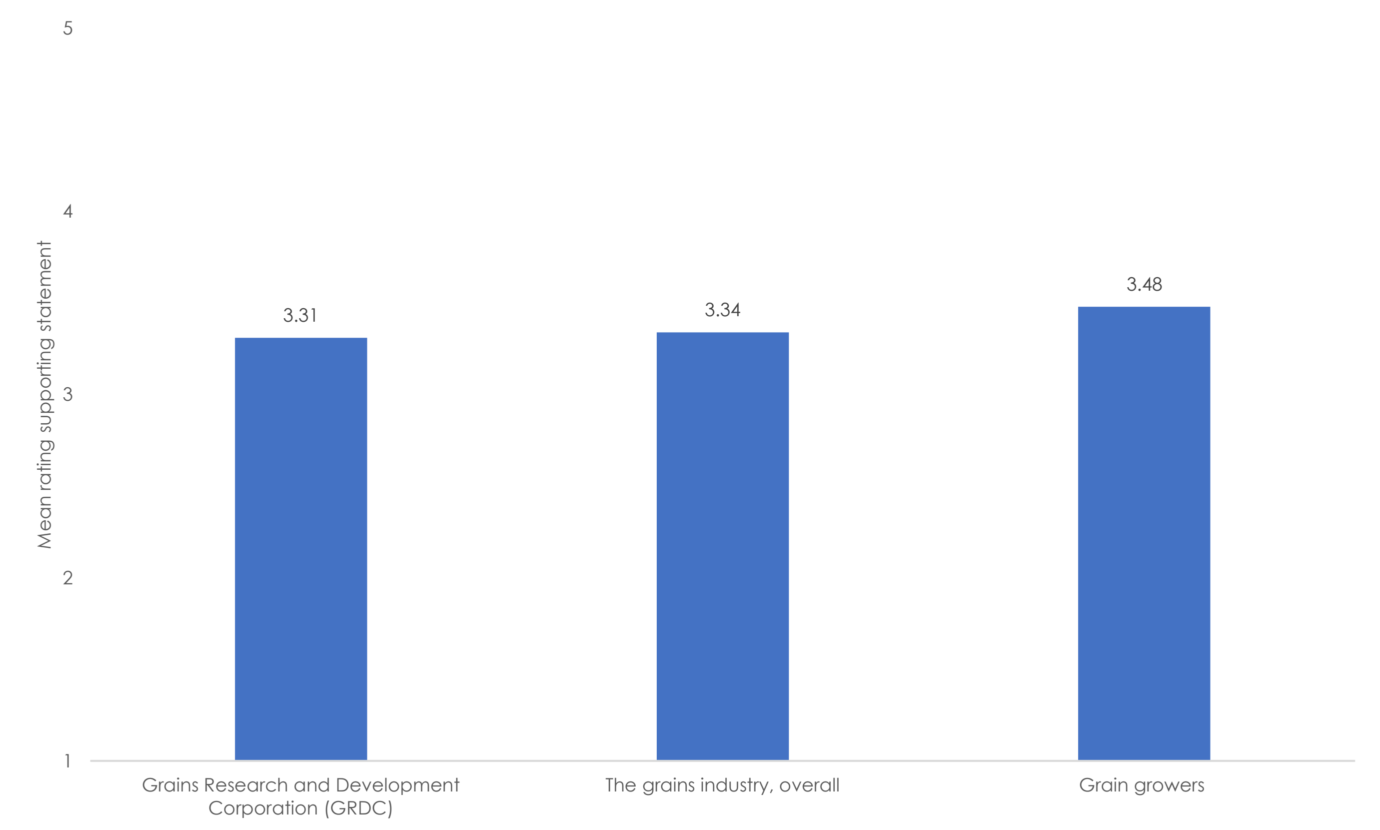


Figure 4: Mean ratings of trust of grains industry institutions, 2024

BUILDING TRUST

The Voconiq approach to social licence research involves using advanced statistical techniques to gain deeper insight into the levels of trust and acceptance in target industries. This approach focuses on understanding the factors that drive trust and acceptance, providing clear guidance on how to reduce social risk by strengthening relationships with the Australian public. Path analysis is used to create a 'path model' that outlines the relative strengths of the main factors influencing trust and acceptance. This information can be used to develop strategies that prioritise the most influential drivers of trust and acceptance, providing guidance during challenging times.

KEY FEATURES OF THE PATH MODEL

Trust is central and drives acceptance – Voconiq used survey data to create the model shown below in Figure 5. As expected, trust is central to the model and is a key predictor of acceptance in the Australian grains industry. The model also identifies direct drivers of acceptance that do not significantly affect trust. These drivers are important but have less influence on the industry or are more transactional in nature. Given the importance of trust in the relationship between the community and the industry, we prioritise trust drivers in our recommendations.

Industry responsiveness – This addresses how much the public feels that the Australian grains industry listens to and acts on their concerns. This includes questions about whether the industry responds quickly to issues and is willing to change its practices based on feedback. When the industry is more responsive, the public's trust and acceptance increases.

Environmental management – This speaks directly to the community's perception around activities taken to manage perceived environmental impacts, and greenhouse gas reduction.

Distributional fairness – This is about how much community members feel they or the communities affected by the grains industry receive a fair share of the benefits (and costs) generated. The more they feel they are treated fairly, the more they will trust and accept the situation. Different factors can interact with each other. For example, perceptions of fairness in distribution can be influenced by the community's position on regulation, as internal policies may determine the level of social investment.

Technological innovation – This measures how much the community thinks the Australian grains industry is good at being innovative in what they do and how dedicated they are to embracing innovation and new technology. The more the community thinks the grains industry is dedicated to doing new things, the more they will trust it.

Industry Knowledge – This relates to the level of understanding of the products, operations and challenges of the Australian grains industry. Knowledge in these areas was found to be low, and an opportunity for action for the industry.

Regulation – This speaks to the level of confidence the public has in regulation and other governance mechanisms to ensure the Australian grains industry 'do the right thing'. The driver combines questions on standards developed internally by the industry, transparency and accountability to the wider public, and the degree to which practices are responsible in managing environmental impacts such as climate change and runoff. The higher the public's confidence that there is effective regulatory framework underpinning grain farming practices, the more they will trust and accept the industry.

Industry importance – This is a direct driver of acceptance in the 2024 model and measures the importance of grains as a staple food and a source of nutrition.

The path model gives a clear understanding of what is important in predicting trust and acceptance. The strength of each factor influencing trust and acceptance is shown by the numbers in the model.

In the following sections, we will look at the second part of the Australian grains industry story: the level of community sentiment in each of these drivers at baseline and other features of the data. When combined, the data provides a plan for improving social acceptance and a starting level for the key model features. These parts of the story are linked but different, and they serve separate purposes for the Australian grains industry in strengthening its social licence to operate.

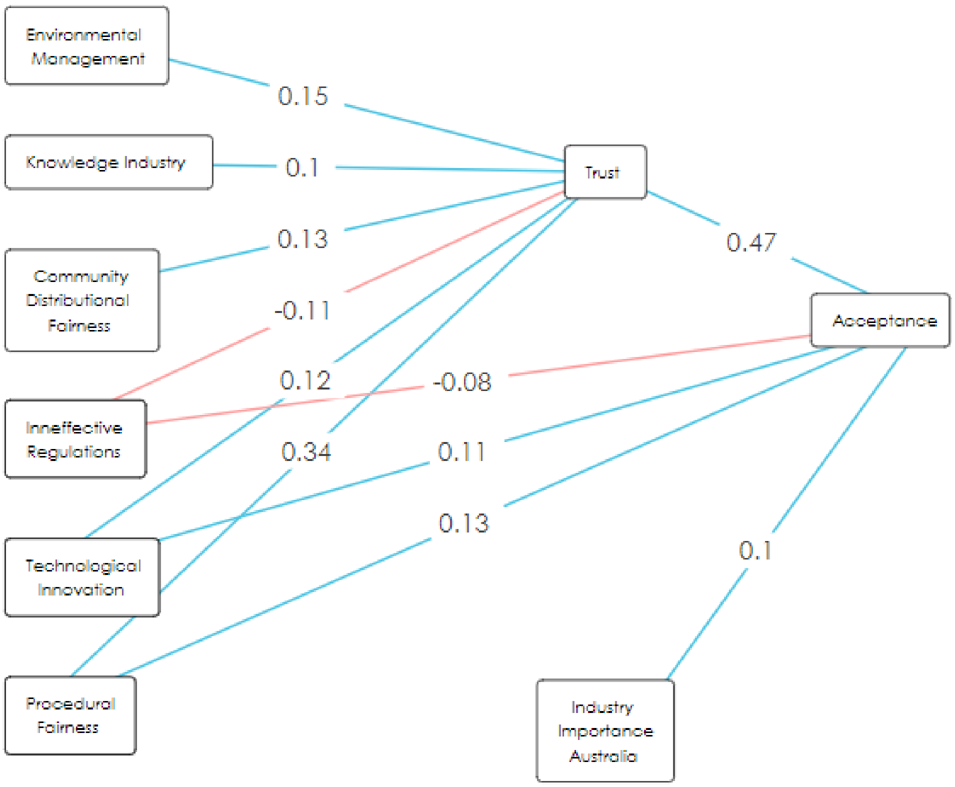


Figure 5: Pathways to trust and acceptance of Australia's grain industry.

A LITTLE MORE ABOUT PATH ANALYSIS

The 2024 path model is shown in Figure 5. 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 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 18. 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.

HOW TO READ THIS PATH MODEL When reading the path model on the previous page, follow the lines from left to right, this indicates the direction of the relationship (e.g. trust leads to acceptance). The number on the lines denotes their importance in predicting the measure they point at; larger numbers represent stronger relationships. Blue lines represent positive relationships between measures (e.g. greater confidence in environmental management leads to higher trust) and red lines represent negative relationships between measures (e.g. greater concern about regulatory practices indicates lower levels of trust).

KEY OPPORTUNITIES AND STRENGTHS

Analysis of our findings identified the core strengths and opportunities for the Australian grains industry.

Strengths

Jobs

84% of respondents agreed that the grains industry generates significant local jobs in regional areas.

64% of respondents agreed that the grains industry provides enough jobs for the local communities where it operates.

Technology and innovation

65% of respondents agreed that the Australian grains industry is committed to using new technologies.

65% of respondents agreed that the grains industry is innovative in it's approach to growing grains in Australia.

Responsible use of pesticides

65% of respondents trust Australian grain growers to use pesticides responsibly.

Opportunities

Knowledge of products, operations and challenges can be improved:

Products
(Mean = 2.79)

Challenges
(Mean = 2.52)

Operations
(Mean = 2.33)

UNPACKING THE MODEL

The modelling shows that the Australian community highly values the grains industry and expects more efforts to ensure its long-term sustainability. By examining each driver of trust, we can identify specific actions to strengthen this trust in the future.

Since our original modelling in 2021, there has been a significant shift in the key factors driving trust. This change is influenced by the different contexts in which the data was collected, including the transition from a global pandemic to a cost of living crisis, and increasing public discussions about the environment and global sustainability targets.

In 2024, the grains trust model has evolved to focus on regulations, practices, and innovations that the community values. This model highlights the importance of sustainable practices and acknowledges the community's role. For the first time, similar to other rural industries, technology's impact on trust and acceptance is clear, emphasizing improvements in approaches and operations. This section will explore the core drivers of trust and key insights from our 2024 model.

Industry Responsiveness

Procedural fairness, or the responsiveness of the industry, is a key driver of community trust in grains. Responsiveness relates to two components: the extent to which community members feel the grains industry listens and respects the views of its community and the extent to which the grain industry is willing to act in response to community concerns.

Scores on procedural fairness have shifted since the baseline survey in 2021 (Figure 6). When asked if the grain industry listens to and respects community concerns, 13% more people agreed in 2024 than they did in 2021. This demonstrates that the community has been receptive to the grain industry operating in a procedurally fair manner in the intervening years. The extent to which the community feel the grain industry is prepared to change its practices in response to community concerns has also improved by 5% since the baseline survey to 49% agreement across all participants. However, when asked if they can forgive mistakes made by the grains industry if the industry acknowledges those mistakes, less people agreed in 2024, down 4% from the initial score of 56% in 2021.

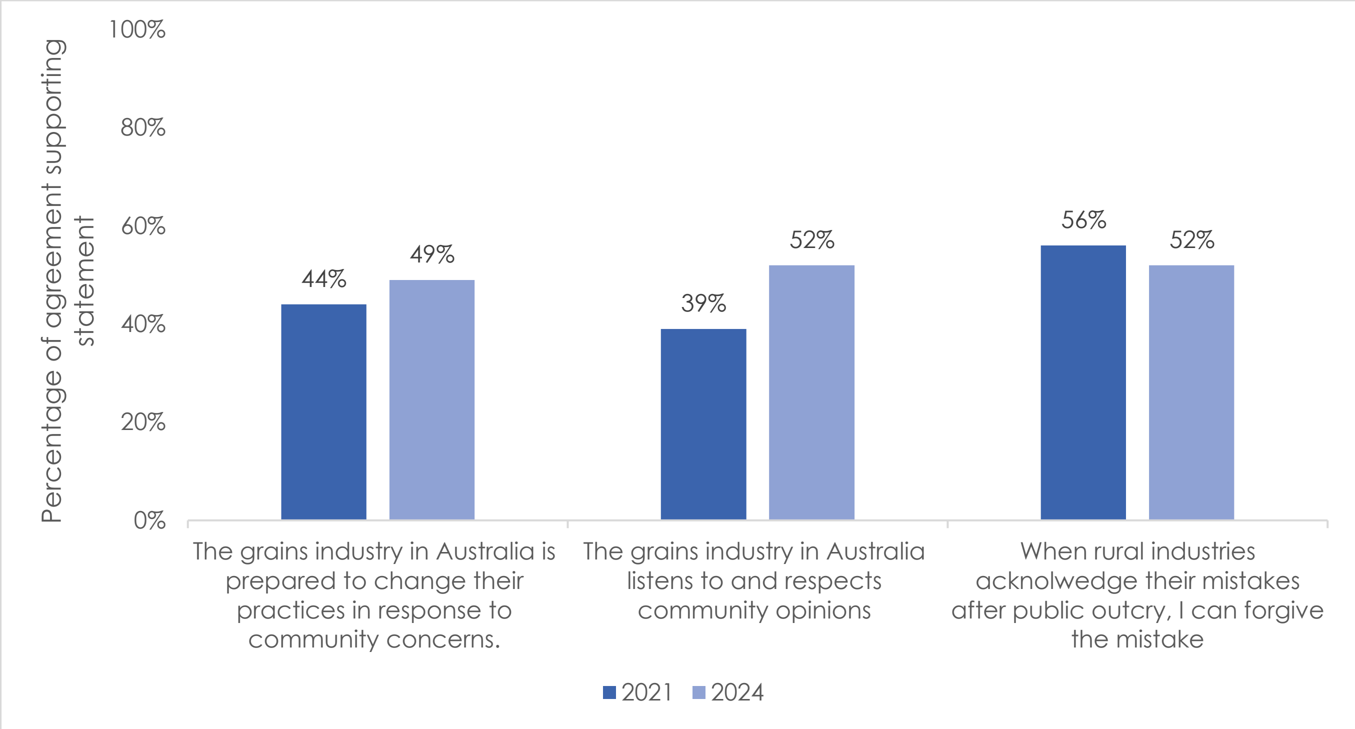


Figure 6: Percentage of agreement with industry responsiveness measures, 2021 and 2024.

Environmental Management

The 2024 survey continues to explore environmental management practices, building on the 2021 findings. Notably, the 2024 survey introduces questions about climate change impacts, greenhouse gas emissions, and waste runoff, reflecting an increased public focus on these areas.

How the grain industry manages its environmental impacts is important to the Australian community. In 2024, 51% of participants agreed that Australian grain growers manage their environmental impacts effectively, up 4% from 2021 (Figure 7). Australians have consistently acknowledged that climate variability is making it harder to be a grain grower in Australia, with three-quarters of participants agreeing in 2021 and 2024 (Figure 7).

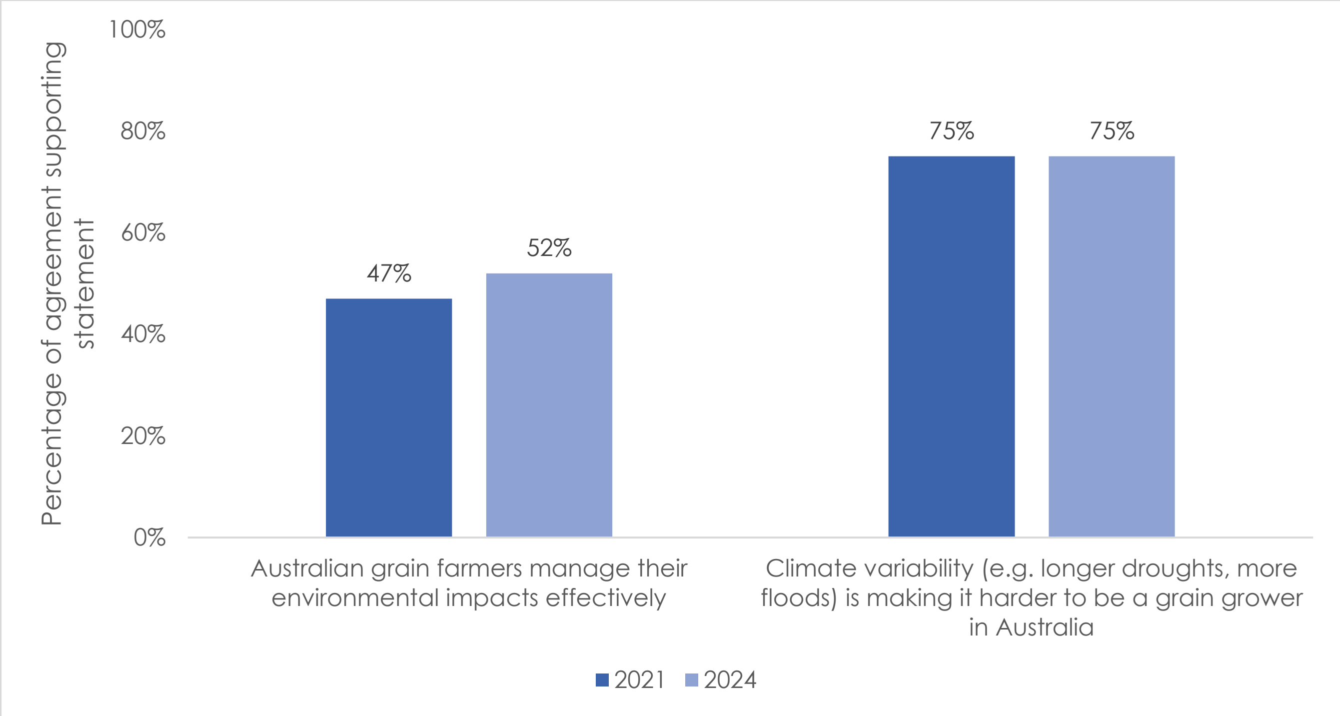


Figure 7: Percentage of agreement supporting environmental management measures

"We have to be more responsible and respect the natural environment" – 2024 survey participant.

Close to half of participants agreed that the industry is committed to reducing greenhouse gas emissions (48%; 6% disagreed, 45% neutral), with 32% disagreeing or strongly disagreeing with the statement 'I don't believe rural industries, like grains, are changing their practices to address climate change' (24% agreed; 43% neutral). These high neutral scores may indicate a lack of awareness in the community of the measures and practices the grain industry has in place to address climate change. This is important, as the perception of action on key environmental issues such as climate change and waste runoff contributes to other drivers in the model, such as regulation.

A fair share of the benefits

Scores on distributional fairness, or the extent to which the community feel as if they receive a fair share of the benefits that the grain industry provides, have remained relatively stable since 2021 (Figure 8).

When asked if Australia receives a fair share of the benefits from the grains industry in this country, 53% of participants agreed in 2024 (11% disagreed; 35% neutral) compared to 55% in 2021 (7% disagreed; 38% neutral). A similar decrease was seen in agreement to the statement 'regional communities receive a fair share of the benefits from the grains industry in Australia' with 50% agreement (12% disagreed; 38% neutral) in the initial baseline survey down to 47% agreement (15% disagreed; 38% neutral) in 2024. While more people agree that most of the benefits that come from growing grain go to grain growers, more people are unsure, with 39% of participants responding neutrally in 2024 and 45% in 2021.

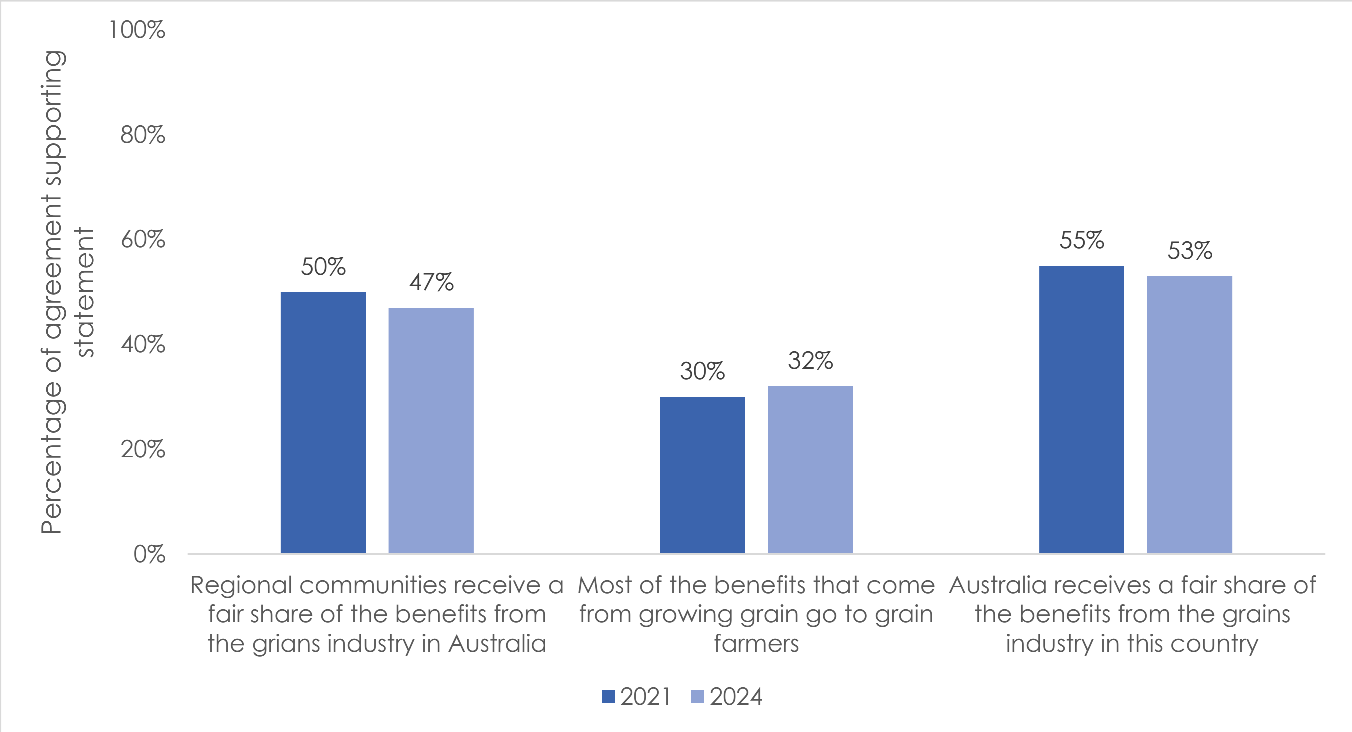


Figure 8: Percentage of agreement on distributional fairness measures

Chemical Use and Technology

While the 2021 survey addressed concerns about weed control chemicals and herbicide use, the 2024 survey expands on this by including questions about the necessity of finding better methods than chemicals, trust in pesticide use, and acceptance of genetic modification technologies.

We asked Australians about their feelings towards chemical use in the grains industry, as well as the innovations the grains industry is making to produce their products. In 2024, 65% of Australians agreed that they trust grain growers to use pesticides responsibly (Figure 8). More than half of participants agreed that without the use of herbicides and pesticides, grain growers couldn't produce enough food (52%). When asked if Australian farmers should find better ways than using chemicals to control weeds and increase crop yields, 59% of Australians agreed, down from 63% agreement in 2021.

When asked if grain growers should reduce fertiliser use, even if it means food is more expensive, only one-third of Australians agreed (24% disagreed; 42% neutral). A similar number of participants agreed to the statement 'farming practices in rural industries, like grains, means we have faster growing, but less nutritious crops' at 34% agreement (17% disagreed; 48% neutral).

The high percentage of neutral responses to these questions, similar to the environmental management questions earlier, poses both an opportunity and a risk for the Australian grains industry. Those who responded as neutral may not have had enough information to form an opinion, or they may simply not have a strong viewpoint either way. However, their opinions can be swayed through further exposure to the industry, whether in a positive or negative direction.

"Australia needs a healthy grains industry I trust they will use the latest technology to keep ahead" – 2024 survey participant.

Close to two-thirds of Australians agree (65%) to the statement 'The Australian grains industry is committed to using new technologies to improve the way they operate' (Figure 9). When asked if they trust a technology the longer it has been used, 63% agreed in 2024 compared to 58% in 2021. A total of 38% of participants agreed that they're more accepting of genetically modified foods than they used to be, with 46% of participants agreeing to the statement 'I am supportive of technologies like genetic editing if they don't introduce foreign DNA into foods'. These results are positive for the Australian grains industry as they show a decline in concern for technologies that are well adopted and have been implemented over a number of years, and show a social licence for grain growers to continue to innovate.

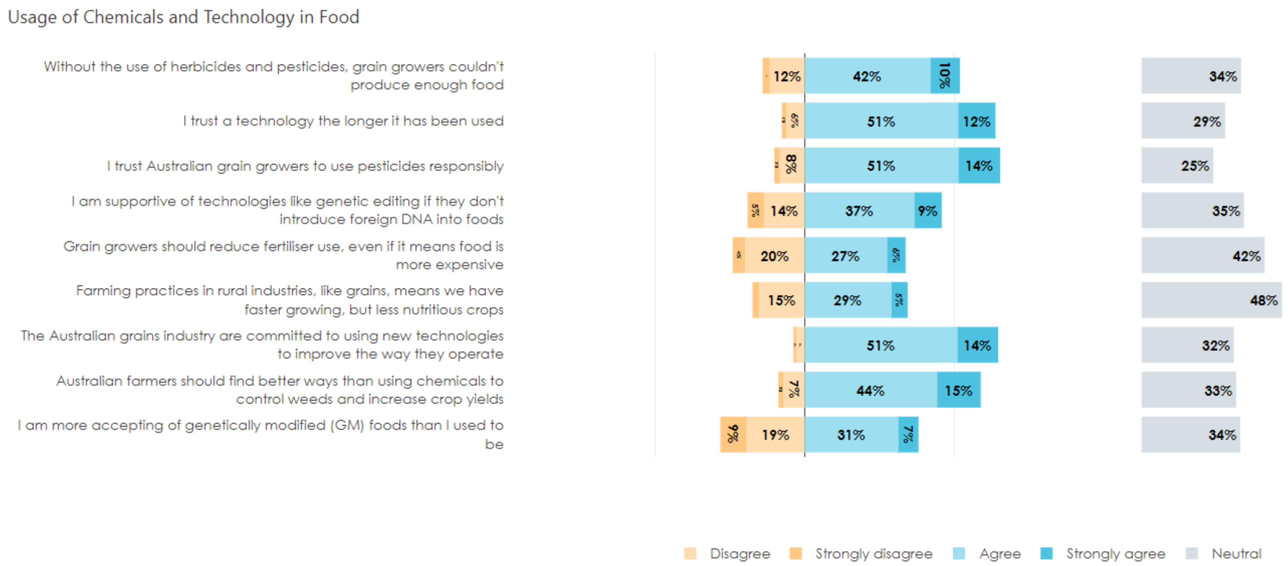


Figure 9: Distribution of scores on chemical use and technology measures, 2024.

Embracing technological innovations can help the grains industry build trust and demonstrate its commitment to sustainable practices. However, it is crucial to communicate the benefits and safety of these technologies effectively to the public. Transparent and proactive engagement can mitigate concerns and foster greater acceptance of technological advancements.

Knowledge of the Industry

The 2021 survey focused on sources of information about the grains industry and general knowledge levels. The 2024 survey continues this focus but delves deeper into specific topics such as fertiliser use, chemical use, and genetic modification, reflecting a growing need for detailed information.

The Australian community was surveyed about their general knowledge of practices related to the grains industry. When asked to rank their knowledge on a scale of 1 (none) to 5 (a great deal), their responses showed overall low knowledge in all areas, as depicted in Figure 10. Notably, knowledge about products was the highest, with 23% indicating they knew "much" or "a great deal". This was followed by knowledge about the challenges they face (18%), and lastly, knowledge about how the industry operates (13%). Additionally, all scored below the midpoint of the scale.

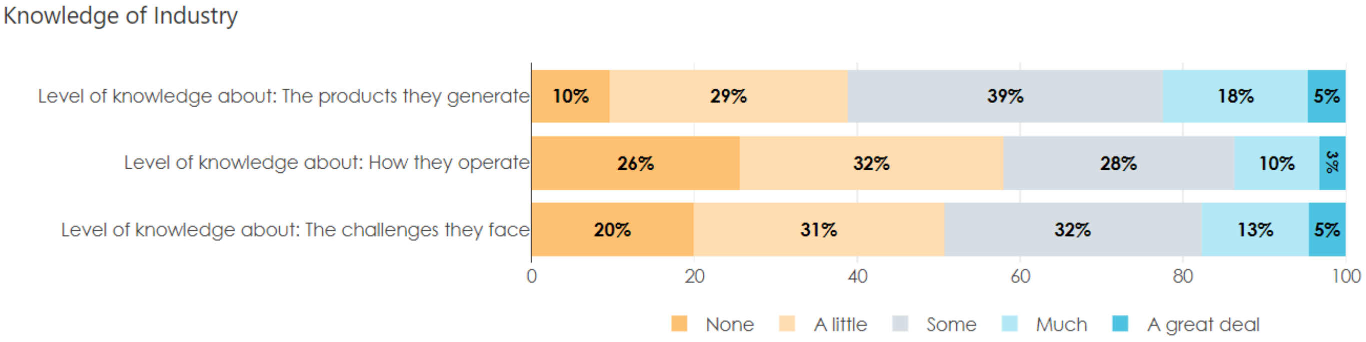


Figure 10: Distribution of general knowledge scores, 2024.

Compared to the 2021 results, there was a significant decrease in 2024 in response to the two knowledge questions that were asked in both surveys. In 2021, the average level of knowledge about the challenges the grains industry faced was 2.9, and it declined to 2.5 in 2024. Similarly, the mean score for the question regarding how the grains industry operate decreased from 2.5 in 2021 to 2.3 in 2024. It is critical the industry reflects on strategies that have changed or how the media discourse has shifted to impact this understanding in recent years.

To better understand the specific knowledge around core practices in the Australian grains industry, three additional knowledge questions were asked about general practices related to the industry, these specific questions focused on chemical use, genetic modification and fertiliser use. When compared to the knowledge about how they operate average score (Mean=2.33), results show participants knew more about the use of chemicals (mean =2.35) and fertiliser use (Mean = 2.36), but less about genetic modification (Mean = 2.18), with all items again scoring below the midpoint (Figure 11).

These results help to better understand the neutral responses seen throughout the survey on questions related to these three areas which will allow for improvements in the next iteration of the survey. Additionally, the results present a significant opportunity for targeted intervention, with a potential emphasis to be placed on where the community may naturally interact with the grains industry or practices it uses.

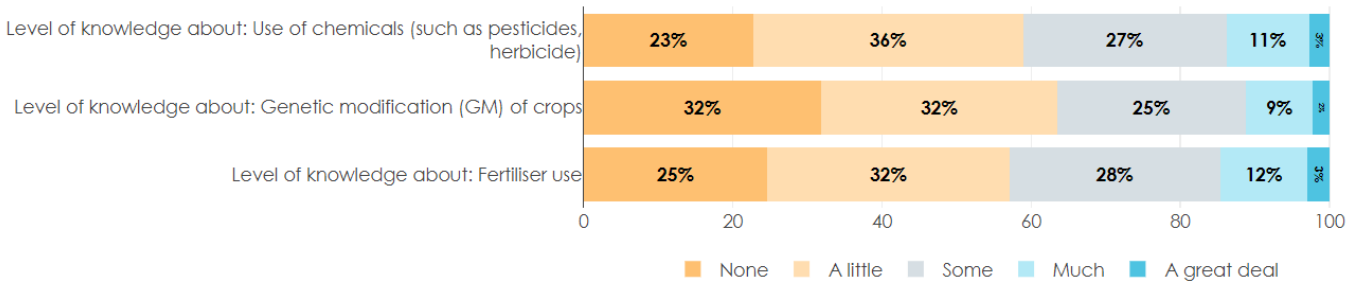


Figure 10: Distribution of practice knowledge scores, 2024.

Impacts and Regulation

Trust in various groups and confidence in regulatory mechanisms remain central themes in both the 2021 and present survey. The 2024 survey, however, introduces more detailed questions on the effectiveness of regulation, penalties for resource misuse, and internal industry accountability, providing a clearer picture of public sentiment on these issues.

The 2024 trust model showed that ineffective regulation was a negative driver of both trust and acceptance. The focus for the Australian community was on the effectiveness of regulation, holding growers accountable and the direct impact of practices on the environment (waste, runoff and climate change). A total of 38% of Australians agreed that penalties for misusing natural resources in the Australian grains industry were not strong enough (13% disagreed, 50% neutral) (Figure 11). Additionally, half of participants answered 'neutral' when asked if regulation of the grains industry was effective (51%), with a relative split between those who agreed and those who disagreed. A similar pattern can be seen when asked if the grains industry is doing enough to prevent waste and runoff damaging the environment (28% disagreed, 27% agreed, 45% neutral).

Overall, more Australians were optimistic about practice change, when asked if they thought grain growers were not doing enough to change their practices to address climate change (32% disagree, 23% agree), however there was still a significant neutral response to this question (43%).

Again, the neutral scores present a risk and an opportunity for the Australian grains industry. As per the model, the more the community feels that the regulations underpinning environmental practices are seen as ineffective, the less they trust and accept operations in the grains industry.

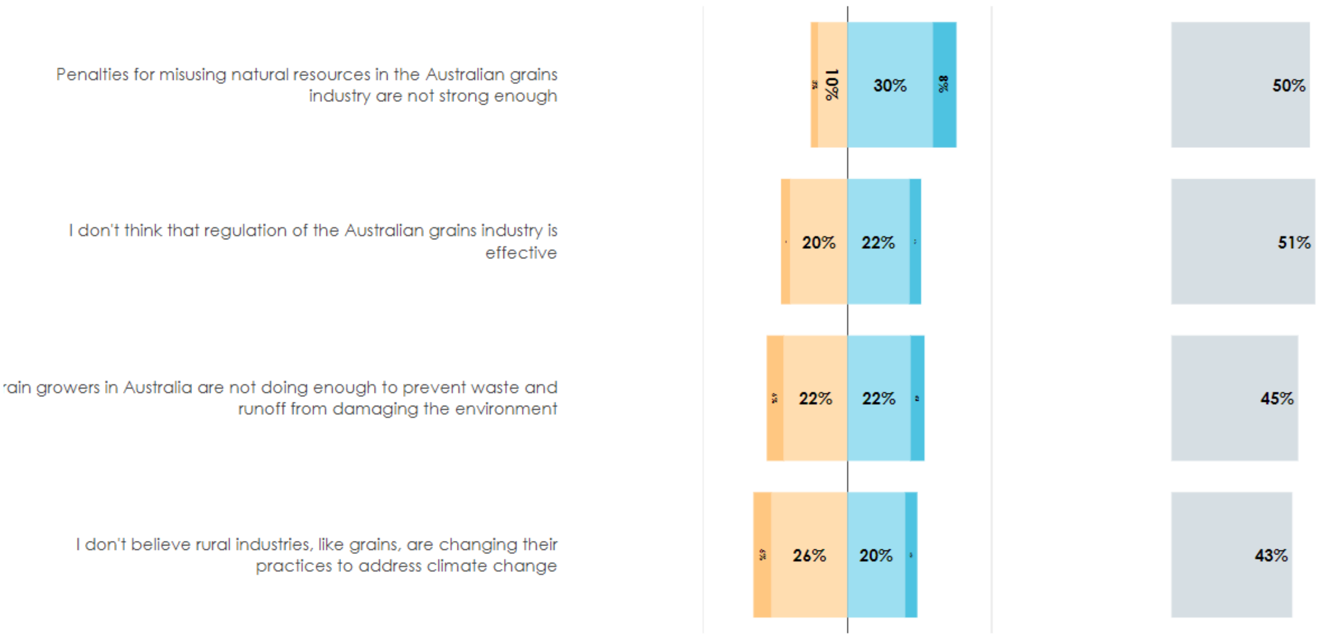


Figure 11: Distribution of regulation scores, 2024.

Positively, despite high neutral scores in 2024, confidence around some areas of regulation has improved in 2024. When asked about their confidence in controls around weed control chemicals and separately around genetic modification, agreement with the questions increased (Mean 3.5, up from 3.3 in 2021 for both).

The Australian community widely agreed that the whole industry should not be held responsible should a few people break the rules (65% agree, 24% neutral). Additionally, when asked if growers were managing their environmental impacts effectively, 2024 respondents showed a majority agreement (51%), and high neutral (41%) (Figure 12). A similar result was found when asked about the industry's commitment to reduction in greenhouse gases (48% agree, 45% neutral)(Figure 12). These results show a strong belief in Australian grain growers.

Figure 12: Distribution of environmental regulation scores, 2024

Strong regulatory frameworks and internal standards can enhance public confidence in the grains industry. By demonstrating a commitment to high standards and accountability, the industry can address concerns and build a stronger foundation of trust.

WHAT ELSE DOES THE COMMUNITY THINK ABOUT THE AUSTRALIAN GRAINS INDUSTRY?

As part of this research, we looked to identify additional areas of consideration for the Australian grains industry. This section reviews some notable findings from the survey based on new question sets included in the 2024 survey.

Employment in the grains industry

We asked two questions regarding jobs within the Australian grains industry. The first question was "The Australian grain industry provides enough jobs for the local communities in which it operates". Overall, the Australian community agreed with this statement (64% agree, 30% neutral and 6% disagree). When then asked if "the grain industry generates significant local jobs in regional areas", the results were more positive, with 84% agreeing (14% neutral, 2% disagree). This highlights the value the Australian community sees regarding the contribution of the grains industry to their local regional communities.

When split by demographics, a strong effect was seen by age for the job significance question (Figure 13), with older groups seeing the work as more significant. This effect was not observed on the number of jobs question.

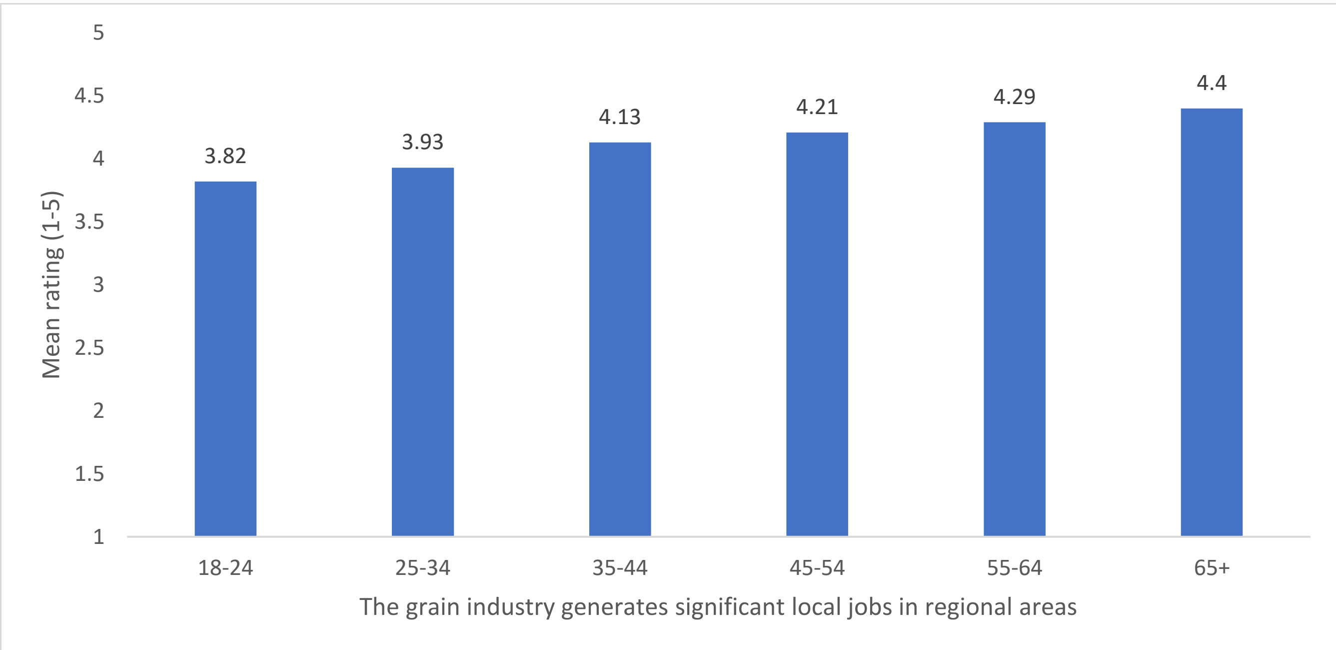


Figure 13: Mean rating (1-5) of significance of local jobs, by age, 2024.

Plant-based proteins

A new section in the 2024 survey addresses community attitudes toward plant-based proteins. This reflects a growing public interest and potential dietary shifts, with questions about consumption patterns, environmental benefits, and nutritional concerns.

In 2024 we asked a series of questions to understand the Australian communities' position on plant-based proteins. To better explore this, five questions were asked. The first question was in regard to people's consumption of protein alternatives (e.g. lentils, tofu and grains) over the past 12 months. The results showed that the majority of the community has not changed their consumption over the past year (61%), but notably 24% stated they are consuming 'more' or 'much more' protein alternatives than previously. Similarly, participants were split on the question "plants are starting to replace animals as the staple protein food in Australia" (34% agree, 32% neutral, 34% disagree).

Delving deeper into this issue, participants were asked whether "eating plant-based protein is better for the environment", overall participants agreed with this statement (41% agree, 37% neutral, 19% disagree). Despite this, participants cited difficulty getting the nutrients required from plant-based proteins (61%) and cynicism around the health of alternative plant-based meat products (43% disagreed that these products were better than the real thing).

Splitting the data by demographics, age can be seen to influence consumption perceptions, with the 35-44 age group being generally the most positive towards plant-based proteins across all questions and regional groups (both farming and non-farming being the most negative). Interestingly, when the data is split by the number of people known in the industry (ranging from 0 to more than 10), those who knew 6-10 people in the industry were on average the most positive of the groups (example below in Figure 14).

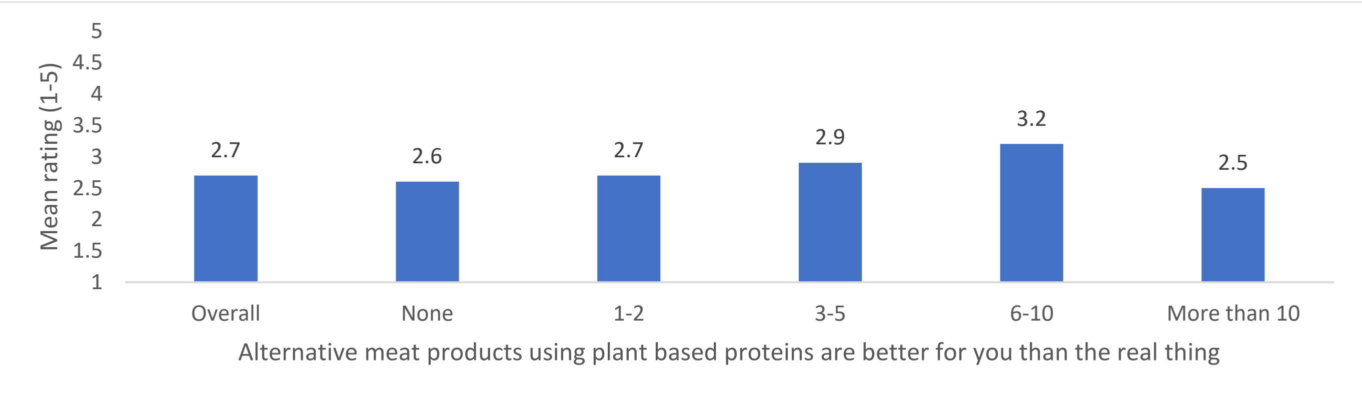


Figure 14: Mean rating (1-5) on alternative meat question, split by number known in industry, 2024.

The increasing interest in plant-based proteins presents both opportunities and challenges for the grains industry. On one hand, grains are a crucial component of many plant-based protein products, which could drive demand for grain crops and the livestock sector is one of the primary consumers of grain. On the other hand, the industry must address nutritional concerns and ensure that plant-based protein products are seen as viable and healthy alternatives.

CONCLUSION

This research provides insights into the relationship between the Australian public and the grains industry. The findings demonstrate that trust is the cornerstone of community acceptance and support for the industry.

The comparative analysis of the 2021 and 2024 surveys highlights how community perceptions and expectations have evolved. The new insights gained from the 2024 survey provide a roadmap for the grains industry to address emerging concerns and strengthen its social licence to operate.

The survey identified several strengths, including job creation, technological advancements, and responsible pesticide use, forming a strong foundation for the grains industry to improve its relationship with the public. By leveraging these strengths, the industry can fortify its social license to operate, ensuring long-term sustainability and community support.

The creation of local jobs is a pivotal aspect of the grains industry's impact on rural communities, not only securing individual livelihoods but also strengthening the social fabric of these areas. The industry's dedication to new technologies and innovation underscores its forward-thinking approach, enhancing productivity and sustainability. Additionally, responsible pesticide use by grain growers highlights the industry's commitment to environmental stewardship and public health.

Building and maintaining community trust is essential for the sustainable growth and development of the grains industry. This requires ongoing efforts to communicate transparently and engage with the community on issues that matter to them. By addressing public concerns and demonstrating a commitment to ethical and sustainable practices, the industry can nurture a positive and lasting relationship with the community.

Identifying opportunities for improvement is crucial for the industry's progression. Exploring these opportunities, such as enhancing industry responsiveness, improving environmental management, ensuring fair benefit distribution, continuing responsible chemical use, and improving public knowledge of the industry, will be vital in strengthening community trust. Proactively addressing these areas will help the industry not only meet but exceed public expectations.

The Australian grains industry is well-positioned to build on its existing strengths and address areas for improvement in order to maintain and enhance community trust. By focusing on job creation, technological advancements, responsible pesticide use, and exploring further opportunities for improvement, the industry can ensure its continued success and positive impact on rural communities. This research provides a roadmap for industry professionals to strengthen their social license to operate, fostering a sustainable and trusted grains industry for the future.

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