

FOOD ALLIANCE WA DPIRD TRUST IN PRIMARY PRODUCTION PROJECT

WA Primary Industries Trust and Values Qualitative Study

NOVEMBER 2019

A qualitative study of WA primary industries
thought leaders on their perceptions and
support for trust building initiatives.



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WA Trust in Primary Production Project Overview

The Food Alliance WA Trust in Primary Production project aims to establish a baseline understanding of the level of community trust in Western Australian primary industries, share insights from best practice approaches to building and maintaining social licence, and identify opportunities for industries to align and collaborate on future trust building initiatives.

The Food Alliance WA Working Group provides leadership and oversight of the project. This group includes executive staff of WA food, farming and fishing bodies, working with the Department of Primary Industries and Regional Development (DPIRD) and the Grain Industry Association of WA (GIWA) which administers the project through a services agreement.

DPIRD generously seed-funded the project and WA Farmers, GIWA and the WA Fishing Industry Council leveraged with contributions to kick start the work to build local engagement and baseline community insights on community trust and perceptions of the WA primary industries.

The Food Alliance WA DPIRD WA Trust in Primary Production project evolved from a DPIRD GIWA Social Licence Masterclass with Linda Eatherton, Ketchum (Chicago) held in Perth in February 2019. This Masterclass involved over 45 key WA stakeholders from agricultural advocacy groups, agrifood industry associations and grower groups.

The Masterclass was preceded by a keynote address by Linda Eatherton at a corporate breakfast event for over 300 agrifood industry influencers, held at the 2019 GRDC Research Updates Perth, on the theme of creating Trust/Social Licence in Agriculture and global insights including from her time working with the US Farmers and Ranchers Alliance.

The Trust in Primary Production project focussed on three key areas during 2019:

1. Establish a **baseline understanding of community trust in WA primary industries** through quantitative and qualitative data collection and analysis of both the community and the industry's perceptions.
2. Conduct a desktop **review of current issues, industry data and research efforts, and social licence initiatives** from around Australia and best practice international case studies.
3. Conduct a second Masterclass in December 2019 to **present the project outcomes and establish industry commitment** to future trust building initiatives.

Introduction

Primary Industries Trust and Values Study

Agknowledge® conducted this study to develop an understanding of the current views of Western Australian primary industry *'thought leaders'* around their perceptions and preparedness to invest and engage in building the level of trust in WA's food production systems.

The selection of Interviewees was guided by members of the Food Alliance WA Working Group and covered the range of industries, the value chain and individuals considered *'thought leaders'* in the social licence and trust space. Agknowledge® made personal contact with each Interviewee and followed up with the questionnaire via e-mail. Follow up phone calls ensured an 80 per cent response rate.

The questionnaire (Appendix 1) was designed to identify major issues perceived to be challenging the public's trust and values around food, farming and fishing, which were aligned to the Metrix Consumer Perceptions Study, understanding respective industries capacity to work collaboratively to action some identified issues, understand the barriers to career entry in the industries and finally to identify some of the positive examples being developed in WA to manage public trust.

There was a total of 86 participants comprising a range of industries and value chain representatives.

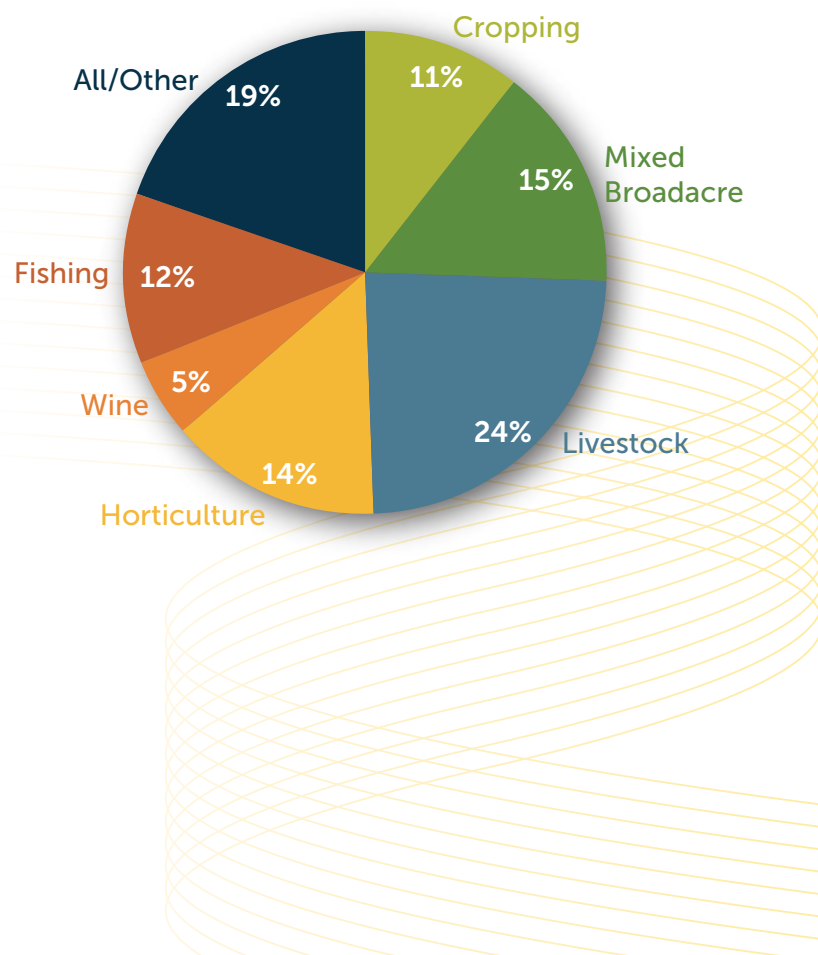
Primary Industries Trust and Values Study: Key Insights for the WA Trust Project

1. Good quality, safe and affordable food is paramount for all. The study demonstrates there are a range of shared values across the food, farming and fishing sectors and the community, which is a very strong foundation on which to build future dialogue.
2. Understanding the shared values between the community and primary industries sector is the foundation for building trust in practices and behaviours.
3. Industry needs to listen to the community to understand how best to explain the improvements it makes in production standards and quality processes.
4. We do a great job at communicating within the industry, but less so at communicating outside of the industry. Some who speak out to defend their industry are too aggressive and put consumers off side, and are giving the industry a bad reputation.
5. Building industry capacity, leadership and engagement is key to ensuring social licence initiatives have longevity and impact, propelled by informed and skilled communicators.
6. Food, farming and fishing sectors have an opportunity to identify common issues and ways to share experience and intelligence, and collaborate and support across sectors well before the next event arises.
7. WA primary industries must identify where they can efficiently and effectively impact or influence public perceptions.
8. Developing clear, concise, consistent messaging owned and managed by WA primary industries and supported by strategic communications plans will help industries align to consistently and credibly build community understanding and trust.
9. Attracting investment into social licence initiatives will be challenging without a compelling strategy.
10. Operational practices of WA primary industries around animal management, chemical use, labour and resource management are contentious in the public's view. Industry is fully aware of the need to address some of the perceived unacceptable industry practices, and the potential impact that the community could have on future operations if they go unheeded.
11. WA food, farming and fishing sectors are in tune with the need to manage social licence, trust or public perceptions. The opportunity to work together at an industry level is well understood, however there are gaps in the current preparedness to work collaboratively across industries.
12. While there is a recognition that the 'trust' work requires investment, the contribution by farmers to the RDCs is seen as an already fair share of wallet investment.
13. Industry does not communicate the diversity of opportunities available in food, farming and fishing to attract young people to the sector. If industry can connect with students at an early age and maintain the connection in their later high school years, there is a better chance of attracting bright young minds to the range of primary industries.
14. There are many positive examples of Western Australian food, farming and fishing industries managing their public acceptance. The opportunity for the industry is to determine how to sustain the effort, provide consistent messaging and be prepared to share knowledge and resources.

Primary Industries Trust and Values Study – Results

Q1. Which primary industry are you engaged in?

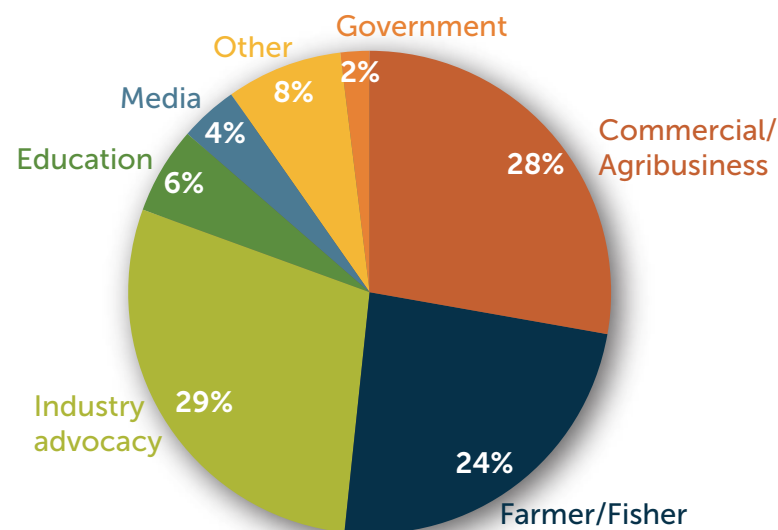
A good balance of industries were represented in the study. There was an equal distribution of gender.



Q2. What sector do you work in?

The whole value chain was represented in this study, from on-farm and ocean producers to the commercial and agribusiness sectors. Participants included a wide range of industry advocacy professionals engaged to work with the primary industries to develop policy, programs and interaction with both their members and government.

The study linked up with the DPIRD/Education Department PRIMED project which is providing agricultural information to schools, and the Buy West Eat Best program which has been in existence for ten years and is a well-recognised logo in the market, to test perceptions around the value of these programs.

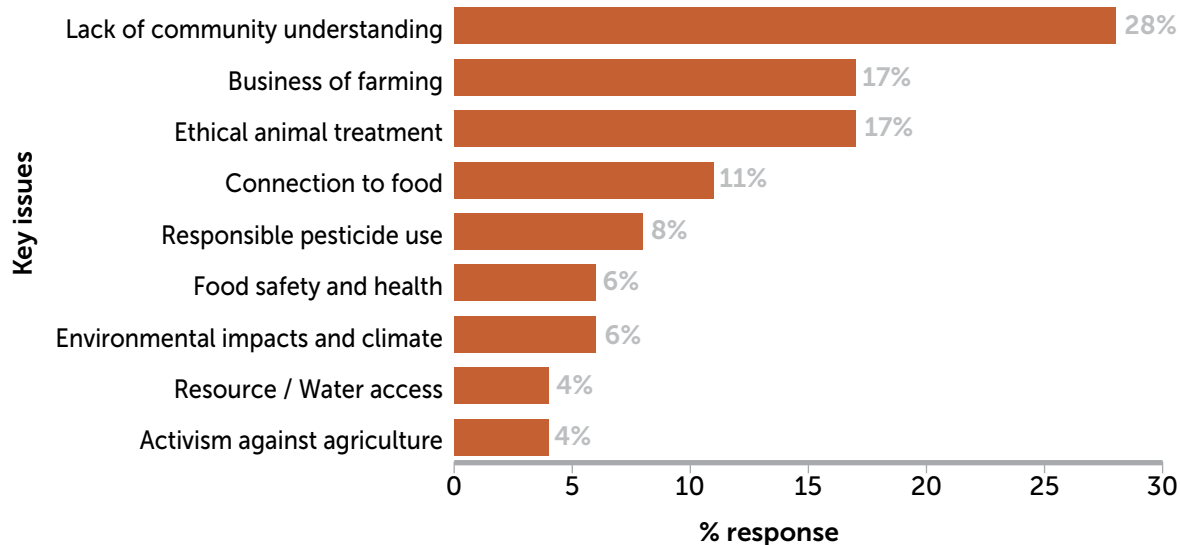


Q3. What do you believe are the major issues challenging the public's trust or social licence of your sector?

This open question allowed Participants to outline a range of issues challenging trust in their sector. These issues were collated and presented in order of frequency of mentions. Of greatest concern to industry was a perceived lack of understanding by the community of the food, farming and fishing industries, with industry acknowledging that this perception was clouded by a lack of listening, connectivity and storytelling by industry of its own story.

Issues grouped into the *ethical animal treatment* heading included a range of animal management practices under the spotlight, as well as the impact of polarisation between farmers and welfare and activist groups. Live export and intensive animal production were regularly mentioned, as examples of activism against an industry which may be driven by a relatively small group with a cohesive campaign that generates a lot of noise – which gets heard by the broader community.

ISSUES IDENTIFIED	# RESPONSES	% RESPONSE
Lack of community understanding/trust/engagement	69	28%
Business of farming	42	17%
Ethical animal treatment	41	17%
Connection to food	28	11%
Responsible pesticide use	19	8%
Food safety and health	15	6%
Environmental impacts and climate	15	6%
Resource / Water access	10	4%
Activism against agriculture	9	4%



Detailed responses on issues challenging trust in the sector

TOPIC	CITED
Perceived lack of community understanding/trust/engagement	69
Lack of understanding and awareness of agriculture / dialogue about it	17
Misinformation / miscommunication / lack of understanding	15
Cost to educate the public / lack of education	6
Failure to engage the public / lack of communication with the public	6
Public has lost connection with where food comes from	6
Regional / urban differing points of view and lack of connectivity	6
International image impacts WA sector (poor image based on unsustainable practices overseas)	4
Global media content / trends affect local trust (don't reflect the WA situation)	4
Lack of understanding by industry of the need to employ more behavioural science rather than rely on more traditional environmental science to get their messages out.	2
Insufficient engagement with farmers and limited access to farms for the community	1
Lack of understanding of organic farming and its benefits	1
Lack of understanding of the food supply chain (growing, processing, transporting)	1
Business of farming	42
Sustainable management / production practices	12
Labour management - wages, contract employment	6
Industry in-fighting / lack of unity	4
Big farms and industrial farms are perceived as bad	2
Overly defensive responses from industry when questioned	2
Workplace safety	2
Isolation (small market)	1
Foreign ownership	1
Lack of best practice	1
Lack of collaboration with wider agricultural industries	1
Lack of information passed on from regulators about management of commercial fisheries	1
Bad image of agriculture	1
Business level capability	1
Marketing and professional skills	1
Production growth	1
Long term profit	1
Zero focus from government on organic agriculture	1
Lack of promotion of careers in ag to the younger generation	1
Lack of industry promotion of its social licence	1
Ethical animal treatment	41
Animal welfare	18
Live export	8
Intensive animal production	5

TOPIC	CITED
Ethical animal treatment cont.	41
Animal activism / polarisation between farmers and animal welfare groups	4
Rangeland management (i.e. cattle)	2
Sheep industry impact	1
Use of antibiotics	1
Livestock production	1
Cow / calf separation in the dairy industry	1
Connection to food	28
Lack of transparency in food systems / confusion with truth in labelling	8
Lack of support for local produce (provenance)	5
Value for money / pricing	4
Traceability / product integrity / food labelling	3
Price of produce	2
Imported produce	2
Lack of connection with chefs	1
Abuse of the 'clean and green' image	1
Adulteration / fraud	1
Market needs of consumers	1
Responsible pesticide use	19
Agricultural chemical use	16
Glyphosate	3
Environmental impacts and climate	15
NRM issues / environmental sustainability	6
Climate change - impact of agriculture	4
Environmental stewardship	2
Management of dairy effluent	2
Carbon footprint	1
Food safety and health	15
Food scares / food safety / food security	7
GM	3
Health (including anti- alcohol)	2
Food waste / food miles	1
Resource / Water access	10
Water access, restrictions and use	5
Biosecurity	2
Transparency of the process to allocate resources	1
Resource competition	1
Ocean is a community resource	1
Activism against agriculture	9
Alarmists / extremists and protestors – farm invasions, focus on minority of events and use social media, informing students beliefs	8
Highly emotive campaigns	1

Additional comments on the major issues challenging the public's trust of their sector

Respondent #21

The public have lost the connection to where their food comes from. The farm sector has failed to engage the public. Social media has meant that farmers can no longer remain quiet.

Grains issues: Glyphosate use and chemical residue on food generally. The perception that 'big farms' or industrial farms' are bad. The perception that farming is not good for the environment (fertiliser use, erosion, mono-cultures). The sustainable use of water resources.

Animal sector challenges: The general perception that animal farming (despite good practice) is not acceptable. "It doesn't matter how well you treat your slaves; slavery is unacceptable!!" Once you establish that it is acceptable to farm animals then we have issues based around the humane treatment of animals at all stages; high lamb losses from scanning to weaning. Mulesing and tail docking. Intensive feed lotting. Shipping of animals on trucks and boats. The acceptable slaughter of animals. The perception that wool production is detrimental to the animal.

Respondent #41

There's a lack of information passed on by Government regulators as to how we as commercial fishers are heavily regulated and managed under strict sustainability guidelines. Basically the Government will never place itself in a position of promoting one sector over another, hence if it is to promote commercial fishing then the recreational sector will attack. The overall problem stems from a historic over fishing of European waters that led to groups like WWF being able to say the world's oceans are being raped by commercial fishers. This did happen in the northern European waters – the Atlantic was nearly wiped out by Russian and English commercial boats. This then lead Greenpeace and WWF to openly criticise and publicly brand all commercial fishing as acting in the same manner, which we in Australia are not permitted to do as our Governing agency and Management Plans are far more constrictive.

Respondent #48

The global media makes broad statements about the poor state of fish stocks internationally without any reflection on what is happening in Australia. It is easy for the public to then assume our fish stocks are in the same state as those overseas. Schools and universities are also providing these same narrow messages to students, so they are uninformed about the work being done here. When I recently asked UWA marine science students if they thought WA's fisheries were sustainable, no-one put their hand up. That is despite many fisheries in WA having Marine Stewardship Council (MSC) certification, independently verifying their sustainability.

Respondent #63

The rise of social media and the multiple voices / interests that social media enables are undermining the value of agriculture to society. There's a (relative) inability of agriculture to respond to these interest groups in a coordinated way. The message this sends/signals to the next generation of talent means they don't see ag as a potential career option.

Respondent #64

Animal welfare and any perception of animal cruelty. Intensive animal production systems (battery hens, pig crates etc.).

Unsustainable use of natural resources (especially rangeland condition, water resources and natural vegetation assets).

Respondent #65

The industry is reactive rather than proactive. There is not enough transparency.

Many people in the industry who speak out to defend their industry are too aggressive and put consumers/the general public off side and they are giving the industry a bad reputation. We need more well-equipped advocates to speak on behalf of the industry.

We do a great job at communicating within the industry, but not a very good job at communicating outside of our industry - we need to change the narrative and the target audience.

Respondent #72

90% of Australians live in urban areas with no connection to how food is grown and no understanding of how their lives benefit from a thriving agricultural sector - not only through food, but jobs in science, engineering, IT, mechanics etc.

We have vocal and well-funded anti-agriculture lobby groups who gain support amongst consumers and policy makers, who then ultimately end up doing the activists' bidding for them by exerting pressure for increased regulation, delays in approvals and further restrictions on agricultural freedom.

Although it is changing, there has been a reluctance to open up and be proud of food production methods and explain to the uninitiated why certain practices are conducted. We have to be proud of what we do.

Respondent #78

There is a raw reality of our brutalised rural landscapes. I take many visitors (urban and international) through farming areas and there is a common response to what they see: 'how could people do this' and it's not just rampant salinity and the more obvious signs of decay, but also the vast crop-dominated landscapes with little space left for balance with nature. Even though there is still good residual support in urban communities, and with many non-agricultural rural dwellers, support is dropping further with the corporatisation of agriculture (outside investors and large family corporates) and the dwindling wheatbelt farmer population levels. I think there is also a declining social licence due to the thuggish behaviour of some farmer spokespeople and organisations - they have rebuilt their membership (from 2-3 decades ago) by playing to malcontents and building resistance to structural issues rather than positively tackling those issues. They win battles but deepen the polarisation between farmers and 'non-farmers'.

Respondent #85

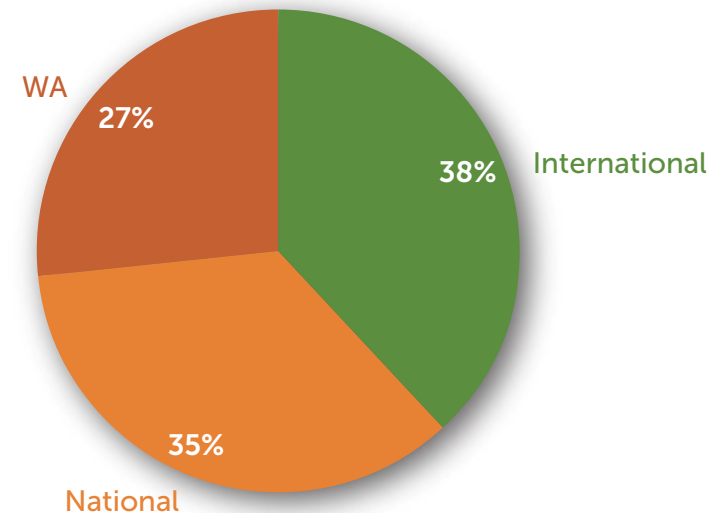
The poor public perception of farmers in general is based on their lack of sound, science based information on current Australian farming practices. Issues of concern are impact on the landscape and environment, use of any chemicals, fertilisers and potential pollutants, farming of any animals for production (meat consumption). This extends to misunderstanding of GM and gene editing, when its use is common practice in much of the everyday life of Australians e.g. medical breakthroughs.

The impact of horticultural practices on the environment also raises concerns with the public who seek clean green food. However, lines blur when convenient for those pushing the 'plant-based' consumption wagon, hence the need for sound science to be used by farmers. This concern extends to growing pasture grasses for animal production and the use of water resources where there is an incorrect public perception of WA agricultural systems which use natural rainfall for much of our systems and don't rely on irrigation, damming of rivers etc. Water use is another issue amplified in WA where we have adapted so much of our land to robust dryland production systems reliant solely on using and capturing naturally occurring rainfall.

Q4. Are these trust or social licence issues driven by International, National or Western Australian influences?

The thought leaders considered where influence was coming from to drive the major challenges for the WA industries: social media was identified as the universal driver impacting on public perceptions and 38% indicated that current trust issues were driven by International influences.

Influences are largely driven by international social media for younger people. Mass and social media are influencers for other population sectors. There is a plethora of misinformation that is sought and absorbed via the internet that is harmful to perceptions of the Australian and Western Australian agricultural industries and this erodes public trust. Much of this misinformation does not apply to Western Australian farming systems but is erroneously applied, to the detriment of the industry.



Key respondent comments on sources of influence on public trust

Respondent #63

The next generation are increasingly aware and mobilised on issues of climate change and sustainability. This generation will soon move into the mainstream and ag needs to embrace them proactively to attract this generation of talent, otherwise ag will suffer with low quality talent reducing innovation and competitiveness.

Respondent #64

These issues of trust are driven by the public perception of producer attitudes and behaviours. The International influence is relatively benign as Australia is managing to maintain an image of clean and green production systems. The National influence is stronger in attempting to regulate unacceptable industry practices. The State influence is the strongest in framing public perception and mainly because the State agencies and peak bodies are the weakest in terms of maintaining standards around social licence (the advent of self-regulation in sectors such as the pastoral industry is leading to widespread noncompliance, land degradation and abuse of natural resource systems). In terms of the live trade industry, the State and the Commonwealth are seen by the public as relatively powerless in the face of repeated and predictable incidents.

Respondent #72

It is important to showcase how Australia leads the world in so many aspects particularly animal welfare.

Respondent #78

Primarily National and Western Australian influences. It is important to remember that WA agriculture is not that far removed, historically, from much of its pioneering phase, and that 'winner take all' approach persists. The move by the Department of Agriculture (now DPIRD) away from its earlier strong support for progressive rural movements, like Landcare and a general recognition of the need for sustainable practices, has further eroded public support, in rural and urban areas. Anyone who spends time on Twitter and other social media will see increasing comment from folk who profess no support or sympathy for the farming sector as farmers are seen to have voted in governments who won't act on climate change, even though farmers are amongst the most directly affected (i.e. western NSW at present).

Respondent #82

- Use of/access to agrichemicals - international
- Allocation of resources (water and land for a non-essential food crop) - all jurisdictions
- Alcohol and health related issues - WA and national with international influence
- Labour practices/access to seasonal workforce - national and international
- Packaging, transport, production foot-print - all jurisdictions

Allocation of resources (water and land for a non-essential food crop): wine must demonstrate a high ROI for the resources used. We need to concentrate on high value markets and we need to adopt best practice farming to ensure our resource use footprint is as small as viably possible. RD&E is required to support this across the value chain from growing high value product to identifying and capturing high value consumers. Without addressing this, the right to farm from an economic and social licence perspective is at risk.

Alcohol and health related issues: WA producers need to position wine as a high value, experiential food product. Align with other premium foods to present a sensorial experience that is not focused on consumption. Work proactively with all government agencies to communicate this and encourage responsible consumption. Push back on highly negative, prohibitionist policy. Highlight the regional value of wine production. While not at the same level of risk as tobacco, the end-point for alcohol could be similar if rabid health advocates drive policy.

Labour practices/access to seasonal workforce: work with other industries to establish labour resource sharing collaboration based on fair remuneration and working conditions. Establish programs that provide aspirational and real opportunities for visa workers. Without access to a flexible workforce, maintaining market competitiveness will be difficult. The flipside is that if a best practice model for seasonal workforce management is developed, it could result in greater market access and/or higher value positioning.

Packaging, transport, production foot-print: as with agrichemical and resources use, other inputs will become harder to justify for a non-essential food product. Innovation across the value chain is required to reduce our production footprint. Over time, products that do have a large production footprint may not be economic to produce, particularly those which are non-essential such as wine.

Respondent #85

Influences are largely driven by international social media for younger people. Mass and social media are influencers for other population sectors. Overall, we cannot overlook the mass of (incorrect and damaging) information that is absorbed and sought on the internet that is harmful to the Australian and Western Australian agricultural industry and erodes our social licence. Much of this misinformation does not apply to Western Australian farming systems but is erroneously applied (through ignorance or activism) to the detriment of our industry.

Respondent #86

Whilst the wider public trust and social licence issues may be largely uniform across states, the political landscape varies and hence the practical impact on the industry is reflective of that variation.

Q5. Are any of the trust or social licence issues you mentioned amplified or more likely to impact the WA industry than in other States?

The issues identified as challenging the public's trust of food, farming and fishing in Question 3 were compared to issues **more likely** to impact in Western Australia than other States. This comparison shows the level of community understanding and knowledge of the business of farming is perceived to be not such an issue in WA, however the ethical treatment of animals remains overwhelmingly the key WA issue.

Key respondent comments on issues more likely to impact the WA industry

Respondent #64

The live export trade is at particular risk in this State, with a significant portion of the public privately uncomfortable with the images that are seen, remaining unresponsive at this time but with the potential for a large and critical swing in trust if incidents continue to occur with prime-time media and social media coverage.

Respondent #78

WA, inland Queensland and western NSW seem to retain something of a pugilistic approach to asserting the rights of their industry, and there is a tendency to skim over the responsibilities. That and the more rapid depopulation of rural areas in WA is eroding public support for the sector.

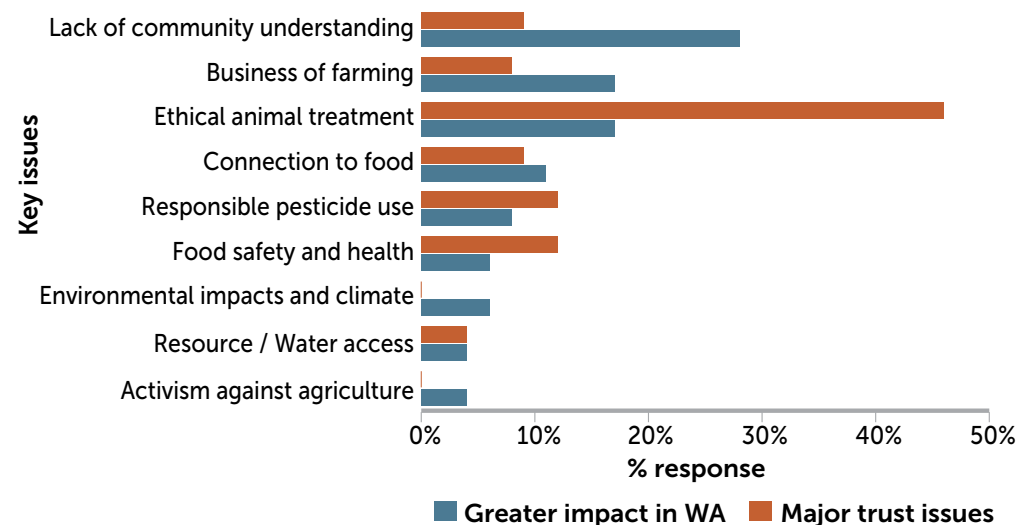
Respondent #85

Western Australia is unique in its isolation and independence from the rest of Australia, providing a geographical biosecurity advantage that we should use to our maximum advantage i.e. there are many pests and diseases we do not have in WA that help build our clean, green agricultural systems.

A major issue is export of livestock cattle because of our proximity to Asian markets from the north, sheep because 90% of the sheep exported from Australian are sourced from WA and hence live exports are an integral part of our sustainable livestock systems.

Water use is another issue amplified in WA where we have adapted so much of our land to robust dryland production systems reliant solely on using and capturing naturally occurring rainfall.

Trust issues mentioned more likely to impact the WA industry than in other States



Q6. How would you explain the specific impact or consequences of these issues for the WA industry to a politician?

When respondents were asked to *explain to a politician* the specific impact or consequences of the key issues for WA, the significant message industry gave was simply seeking all of government to be 'proud' of the contribution of primary industry and not react instantly to loud social media activism seemingly impacting on the next 'vote'. The feedback consistently implored that when decisions are made politically, they be based on sound knowledge of the consequences of that activity to the industry and community – such as chemical use and live sheep export.

There was a strong belief that the WA economy benefits from a strong agricultural industry, where businesses provide employment and a geographical spread of population throughout the state, nurture the environment they live in with sustainable systems for the future and contribute to vibrant country communities.

Key respondent comments on explaining impacts of issues on the WA industry to politicians

#	Comment
1	Sudden shocks create huge adjustment challenges, for example the live export ban; there is an immediate economic impact across both the industry and regional economies.
2	Allowing time for transition from one practice to another will take time and this needs to be considered in any legislation changes. Not allowing transition time will impact cost of production and may impact lamb availability on shelves as the transition progresses.
3	Broadacre agriculture is high capital, high risk under tremendous international competitive pressure: to remove one of the pillars of the system will see serious and rapid flow-on impacts to growers which will hit rural employment and communities. Simplistic solutions like organic or free range will simply see other states supply our price-sensitive domestic market. And while the international market is working its way through issues like GM, and live export or mulesing these are best left to the market because rapid legislative change will result in a loss of confidence by banks and farmers will see immediate impacts on investment and profitability.
4	Using a whiteboard and some finger puppets!
5	Not being proactive in addressing the 'real' issues means consumers and the general public become even more disengaged and attack industry more regularly.
6	The impact of a loss of access to the fisheries resource would be huge, so I would go to the table with statistics, facts and figures. Similar to how the recreational industry calculated their worth: I would want to have a similar dollar figure on our seafood industry's value (across the supply chain). I would showcase how many jobs, dollars and opportunities are being pumped into not only Perth but regional towns. Would also back up 'well managed fisheries' with local social licence examples via the Marine Stewardship Council (MSC). I would also have a backlog of examples of industry men and women doing fantastic work to build social licence. With the accumulated evidence – I would go back and put it on the table and negotiate – 'we are worth this much; we provide this large amount of jobs AND we contribute to WA's tourism industry.'
7	There is a direct correlation between water and production and so any reduction in entitlements directly affects our business profitability. Horticulture is a labour-intensive industry and we are very reliant on backpackers. These workers are vulnerable to exploitation although many, particularly those who have overstayed their visa, are complicit in their own exploitation. The government needs to introduce a labour hire licensing laws to address where exploitation occurs.

#	Comment
8	The WA wine industry has self-regulated on pregnancy warning labelling and health warnings at cellar doors, and takes a responsible attitude to alcohol. Premium wines are not usually the catalyst for alcohol abuse, nevertheless the industry has taken a strong stance on consumer education.
9	The change or banning of a particular practice could result in a loss of productivity and profitability for the agricultural industry and hence the state, not to mention the impact on rural communities and loss of market share. Show the potential figures.
10	On the farming side of things there is a mistrust of government and their processes. Water is the key ingredient to horticulture, we are totally reliant on it. These restrictions may be valid, but if they are not communicated well it leads to mistrust.
11	The importance of trust and provenance must be a message that is sold continuously and uniformly. I believe it is a much needed message that must have a long-term strategy, otherwise people will just choose on price point.
12	Financial impacts on the business economy, the need to re-connect with customers, we need to modify practices and adjust to public expectations.
13	Tell politicians we need to spread more good news stories about growers and what they are doing and the benefit of agriculture to our economy. We need to make sure that any decisions that are made politically, come with sound knowledge of the consequences of that activity to the industry and community - such as chemical use and live sheep export.
14	Australia can boast decades of generally profoundly successful aquatic resource management. The product of that is healthy oceans and waterways, well managed stocks and in many places healthy businesses which are vital to the social and economic fabric of regional WA. Quite simply, if we do not develop and maintain our social licence these industries will be lost, and forever. Collectively, we should all stand in unity in taking credit for this successful management of these public resources. This credit can be assigned to governments, government departments, fishers, fishery managers, Indigenous nations and others, and if we are willing to collectively and collaboratively work toward singing a positive and true message, in chorus, then we may then create an environment whereby we achieve the level of support we all dream of - advocacy. Not just acceptance, but advocacy. Community advocacy is the best insurance going.
15	We need access to every tool available to breed the best suited varieties for our conditions:
16	Without government investment into marketing our unique differences and strengths, WA will continue to be a polarised regional tourism market place - Margaret River and Broome - to its detriment.
17	I'd explain the likelihood of lower productivity and therefore higher cost of production resulting in our reduced national and international competitiveness.
18	<p>The world population is increasing at a greater rate than agriculture can produce food and climate change is impacting our ability to meet the demand. Australia, in particularly WA, has the ability to reduce greenhouse gas and climate change due to our area of land and the fact that farmers manage a great deal of this land. The consequences of social licence and potential negative impact on agriculture not only has a global impact on food availability, but WA cannot afford to lose more farm businesses and communities due to these extra pressures and economic instability.</p> <p>I've recently read a quote which states that the health of agriculture is the barometer of global health. Social licence has the potential to turn our industry around to a positive future if agencies, organisations and policy are all aligned.</p>
19	Use clear examples of events, provide figures and information on the industries they support.
20	Undue influence by an unrepresentative, inner urban 'echo chamber' of opposition to production in natural resource systems often causes paralysis in decision making.

#	Comment
21	<p>Live export: Firstly, the images of poorly treated sheep on boats is extremely damaging to the brand of Australian Ag. The work that the government and industry have done to ensure better treatment of animals is fantastic. The support of more processing in WA is important and the government can further help by policies to assist in labour supply issues. But support of live export is important to service a sector of the production sector that produces an animal more suited to a live market. It also is an important relief valve in a poor year when farmers need to de-stock to avoid animal welfare issues and erosion. Farming systems are very much set up now to be flexible with stocking densities dependent on the variations in the climate from year to year. To do this we need options to sell stock. Those options do not always exist domestically.</p> <p>Big Farms: Industrial farms often have the resources to invest in better farming techniques that both increase production and sustainability. They are often more productive per hectare, increasing our ability to feed the planet. They can often afford to employ support services such as agronomists, advisors, traders etc.</p> <p>Glyphosate: Farmers have three options for removing weed burdens prior to planting crops. They are cultivation (which causes soil erosion), Paraquat (an S6 chemical, recognised as one of the most dangerous chemicals used by Australian farmers) or Glyphosate (one of the safest chemicals used by Australian farmers). All chemicals are dangerous and need to be applied with care. Losing the ability to use glyphosate in the WA system would dramatically reduce productivity and increase soil erosion.</p> <p>There are two uses of Glyphosate: first is to remove weeds prior to sowing, the second is to desiccate the crop prior to harvest where the crop has set seed and the weeds have not yet set seed. I believe it is the second use of glyphosate that is of most concern to customers as it has the potential to result in chemical residue on their food. I believe that using glyphosate for desiccation is a practice farmers in Australia could give up as it would give us a point of difference with some of our competitors who desiccate summer crops to ripen crops prior to snow fall.</p>
23	<p>It is important politicians talk to farmers. Loss of markets, loss of trust; farmers are under so much pressure, most farmers are in their 60s and not a lot of succession is happening. An organic farm for 20 years may revert when the farmer retires and sells the farm: it may lose organic status and return to conventional farming. There is a lot of hardship, mental health implications.</p>
24	<p>Sheep Collective is doing a great job in showing what 'normal' looks like. Important to explain the impact on industry, rural communities and employment. Political decisions are often not fair or just. Focus should be on fixing issues, not a knee jerk reaction at a time of crisis. Politicians need to be made very aware of the flow-on effects from their decisions e.g. decisions on live sheep export may flow on to cattle exports, implications for domestic livestock transport, implications for livestock on farms.</p>
25	<p>Start with flock animal welfare, and the impacts this would have on animal health and management locally, and then in the case of live export, internationally. Continue to discuss impacts on communities and people, touching on finance from the point of view of how can we produce food to feed people. Big issue with agriculture is it seems all the air time is us talking about it ruining businesses/profits, rather than talking about our concerns for animal welfare.</p>
26	<p>Poor practice from one grower is often unfairly generalised to the entire industry and good practice does not receive the same exposure. These issues are not simple to fix and punitive or knee-jerk reactions to flashpoint events are unhelpful, a long-term strategy including affordable alternatives for growers is required. Good practice needs to be traceable from the customer to the grower to be rewarded.</p>
27	<p>Specific impact - decreasing farm gate returns.</p>
28	<p>Strategy for primary production as the second largest economic contributor to the state. Impact of negative campaigns on regional jobs, investment and growth. Importance of strong industries with support and backing of government.</p>
29	<p>Sustainability and biosecurity are increasing in importance for aquaculture industry growth and social licence will depend on the Government's ability to demonstrate its credentials and credibility in these areas.</p>

#	Comment
30	The only resonance I have had is when explaining that anything that leads to a reduction in self-reliance on risk management in the sectors that operate and employ in rural areas, will mean less jobs and money in rural areas. WA is unique in its export focus in that we are geared around meeting the needs of other countries; by doing so we bring money from those countries into the tyre shops, shearing teams and auto electricians in rural towns. We are customer focused, our issue is that our customers don't vote in either state or federal elections.
31	The state's reputation as a quality and consistent supplier of food is under threat in the face of our poor systems placement. In the face of climate change, highly geared international energy and input product requirements and lack of production diversity we are very vulnerable to deliver much ongoing value as an industry to the economy.
32	Consumers will withdraw social licence unless we can articulate our current state and our desired future state with integrity.
33	If we can't package and if consumers stop purchasing our product because we use plastic, we will no longer be able to grow bananas in Carnarvon. The industry has survived as the packaging makes the bananas marketable and saleable. Without it our market will collapse along with around 160 jobs in production and the supply chain.
34	It damages our clean and green image of Australian honey that we have spent many years trying to establish.
35	WA produces high quality, premium priced wines so is less likely to create social health issues than cheaper alcohol products. Environmental issues are particularly important as the south west is a recognised biodiversity hotspot, with pressures from agriculture and tourism. Government should have a role in providing a regulatory framework that encourages responsible management of issues likely to create social licence problems, developed in consultation with industry, but it must be effective.
36	Social impact on farmers' health and well-being: feeling of disconnect, fear of trespass, loss of pride. Economic impact: fear of change drives slowdown in adoption of new technologies and methods of production e.g. live sheep trade to chilled high end product processed here.
37	Hold an agribusiness industry sundowner(s) targeted at chefs and hospitality service people.
38	Because of my expertise, I would be coming from an education / awareness raising angle. Disconnection in WA is amplified by the size and highly urbanised demographic. In the age of social media, markets can shut overnight!
39	<p>Water - the controversy around the SFIS is very demoralising. "Big/Corporate Farms/external investment" have been (literally) slandered and irrelevantly tarred with the Murray Darling brush, while "true-blue generational family farms" are generalised, green-washed and valorised. No conversation around the economic and community fabric the bigger farms underpin and enable the smaller farms to access and thereby function at all.</p> <p>Chemical inputs, cool storage & plastic packaging - public demand for cosmetically perfect, bagged for convenience, protection, food safety, and falsely cheap fruit available year round is completely at odds with the perception that all farms should fit the "organic farmers market" model and enable guilt-free "I deserve cheap prices" shopping for the consumer.</p> <p>Wages - high scrutiny on horticulture. Businesses which have historically striven for best practice penalised with additional expense and time of completely superfluous new compliance e.g. Sedex. Pressure on retailers to ensure supplier compliance, yet no conversation around demanding similar compliance from international suppliers... yet more price pressures then exerted from the falsely cheap imported produce (glaring lack of comparative social or environmental credentials)</p>

#	Comment
40	When live export ban came on so quickly without consideration of the side effects, it cost us a lot of money indirectly as sheep prices dropped from \$125 to \$40/head overnight with a loss of income and ramifications through the whole supply chain. There needs to be a planned transition like the lobster industry. Disconnect from city to rural and a lack of education of why farmers do what they do, means that alarmists, extremists and protesters can focus on a minority event and promote it through social media despite it not being representative of the day to day reality. The public has to put a higher value on their food security and quality of food, otherwise climatically and with drought there will be a lot of transition out of the industry.
41	Do we want fresh local seafood in the future and the related jobs through the supply chain i.e. tourism and hospitality as well, or do we want to rely on non-sustainable imports?
42	WA has a unique position in the world honey market in that it can provide a pollution and disease-free product. We cannot afford to allow that marketing point of difference to be compromised.
43	The issues are relevant, very real and will affect our future food supply and how we do it. The issues will not go away unless there is a war or depression - our society is only getting richer and we have never been hungry as a generation. Producers and government need to tackle the issue together to move forward so industry can do its best to produce food for the state and the world, and we can also look after our country. We can't make money if the environment suffers as well.
44	Most politicians are well aware of the issues.
45	Live sheep export takes off at least 30% of the WA sheep flock each year. Next state is SA in taking 5%. Cessation of the trade would decimate the WA sheep price and would result in a huge downturn of the WA flock size. This would lead to WA processors closing due to limited supply in the medium term. Northern WA is heavily reliant on the live cattle trade with cattle numbers and land values dramatically decreasing without an outlet for Northern cattle.
46	They erode public confidence, reduce empathy and support for the sector meaning it is harder to garner the support for the resources needed to effectively manage this region.
47	That managed hives are monitored and maintained by the owner and their numbers managed. And that bees are very important in every area for pollination.
48	I'd like to think in most cases our politicians seek the facts so they are aware of the consequences of these issues before they make decisions. We are regularly briefing them of these threats and how certain actions taken by Government may or may not affect our fisheries. Our role is to keep them informed.
49	All of these issues affect viability of agricultural businesses and industry's ability to make and fund changes within a limited scope that is expected by consumers whilst remaining financially viable.
50	Present a solution to the member of parliament and ensure their understanding of what has been put into play in order to improve practices already. Solution - there isn't any one, ongoing improvements to what is currently done. Our standards are world class which needs to be recognised as well, we can always get better but what we are doing from a welfare perspective is better than anywhere else in the world.
51	There would be short and long term consequences of not being able to restore people's faith in chemicals like glyphosate and the live trade of animals such as sheep and cattle. Short term consequences could be winning/losing elections. Long term ramifications would be both positive and negative. Pretty complex.
52	We know consumers like to consume local milk that is produced ethically from WA dairy farms. WA dairy farmers are trusted and recognised as being producers of high-quality milk from a pasture-based dairying system.

#	Comment
53	Biosecurity risks / violence / damage, unnecessary costs due to RSPCA lies.
54	I think they are well across the issues. There is an awareness that support for industries that offend many action groups can result in action against key players such as banks or politicians that are not directly responsible.
55	<p>The impact of imported produce is that it doesn't build any consumer confidence in buying fresh produce. We protect and maintain our valuable land and water resources so Australian farmers need the consumers to be confident in making the choice to purchase locally even if it costs a little bit more.</p> <p>Contract labour – with lots of poor media coverage surrounding contract workers being employed by farming entities, we have no choice but to use above board contractors instead of local staff but it portrays a poor image of farmers not using local labour.</p>
56	<p>Dairy farmers have been unfairly targeted by aggressive activists coming on to their farms and stealing livestock to attract attention to perceived animal welfare issues. The public may believe that animals are badly treated throughout the dairying industry as a result of this negative publicity.</p> <p>Dairy effluent is an issue that has received a lot of negative attention. However, dairy farmers have made huge strides in reviewing and managing their effluent with more than half the industry now involved in reviewing or improving their systems.</p>
57	Are the WA beef industry and politicians going to continue to acknowledge that building public trust and retaining a social license must be at the forefront of the business agenda?
58	Perhaps not understanding the supply chain may lead to a lack of support for locally grown product, or an unwillingness to pay the price for a product if customers are unaware of the inputs required from growers, distributors and retailers to bring the product to market.
59	Very carefully.
60	WA produce is world class in every way. The management of fisheries and the marine environment is at world's best practice. While there are impacts on the environment, in all fields of endeavour, this is the case. Fisheries are a renewable and sustainable resource that Australians and the world value highly. It is essential we are able to continue to create wealth and jobs in our regions through these industries.
61	Obviously greatly important if their constituents believe in protecting fish stocks.
62	<p>WA has earned international regard for being one of the cleanest and healthiest food production outlets in the world. Chinese investors have recognised that WA farmland is an asset and are investing in WA in order to farm and send back to their country. WA beef receives a premium internationally and we are therefore exporting more than we consume in WA. However, our politicians refuse to invest in more research, subsidies and incentives to promote good and healthy production of food including regenerative and organic agriculture (again this is changing thanks to Alannah MacTiernan - but a bit too slowly and with pressure from other sides of government). We also don't recognise the importance of good agricultural soils to promote healthy communities and we continue to consider GM products (such as CRISPR) to be introduced into WA. Once we introduce them it is virtually impossible to remove them, and the value of our assets (our soils) is lost almost forever. A blanket ban on GM and programmes to improve soil health will result in our assets being considered of significantly higher value, our communities will benefit and we will receive a premium for our product in the international marketplace.</p> <p>I also think it is important, rather than to berate politicians, to bring them on the journey. Whilst what I say above is largely negative, inspiring politicians to act and champion the cause is what will drive change. Also picking one salient and important topic at a time will help politicians to digest the information better. A good example is regenerative ag. While it is not the utopia of organic or biodynamic farming, it is a big step in the right direction and potentially more palatable for the other side of politics and the wider community.</p>

#	Comment
63	Very good question. WA is an exporting state and we need balance between the views within WA and Australia to those of our major exporting partners. Hence, we could see local activism impact on export markets. Our politicians need to be aware of this. Also, every time we allow an issue to go un-checked or without a balanced counter argument, it is further fuel for future employees not to consider ag as a career option. Agriculture needs to stand up, with regarded industry figures as well as people outside of ag who are strong supporters of our industry, to have a voice but for this voice to be co-ordinated/connected.
64	Impacts and consequences of preventable and predictable practices should be dealt with firmly and through the lens of the public good rather than as private aberrations, and the majority of the population expect you as a politician to uphold this approach. Industry sectors have had many years and opportunities to get ahead of the public trust challenge and some industries such as the dairy industry have been proactive, responsible and courageous. Other industries such as the pastoral industry are too often reactive and prominent pastoral leaders are seen by the public to be blatantly putting private benefit before State and community expectations of social licence.
65	If the industry loses the trust of the general public/consumers, we face losing our right to continue producing food and fibre and contribute to the state's economy.
67	Could lead to excessive regulation of agriculture, lessening farmers' ability to farm efficiently and sustainably. Contribute to farmers choosing to leave the industry, leaving us with insufficient food/fibre. Increased reliance on importing our food/fibre.
68	Emphasise the need for education and the fact that aquaculture is an important regional industry that provides employment and downstream economic benefit.
69	Take a well informed view with empirical evidence to back your argument.
70	If we do not communicate the positives of our industry it will be easy for consumers to target certain aspects of food production from an uninformed perspective. This could see a move to less consumption. Veganism and its negativity to meat is a good example of this.
71	There is always a cost involved, auditing, red tape, compliance - all flow to the consumer in the end. Anybody that doesn't grow the product should not be able to brand the product - you don't get the suppliers name on it. Product of WA or Australian grown - they do not grow it should not be able to brand it. At the moment the WA government are very responsive to the chicken meat industry, previous Ministers had an agriculture background. Little bit of a problem there.
72	The world demand for protein will continue. Australia has some of the best animal welfare and production practices in the world which we should loudly proclaim so our strengths are exported. We need your help and support to explain to those not connected with agriculture that what we do is sustainable and best practice and in their best interests as well as the world's.
73	Consumers are concerned that food is unsafe when grown using pesticides such as glyphosate.
74	I would firstly explain how the current public views the food industries as a whole and how it impacts them on an economic level, followed by their public's trust and local's trust in the food industries which all have cascading effects.
75	Any bad advertising of an industry has a negative effect on industry, costing money whether its loss of market or heavier regulation, it all comes at a cost to businesses and industry and in some cases making it unviable to operate.
76	I'd use the example of the impact of removing a small fishing sector from a regional town; it may be only ten boats, but that is 30 direct jobs, more indirectly it affects the whole town through 30 families moving away, which affects school numbers, sporting clubs, volunteer organisations etc. so it is more than just ten boats.

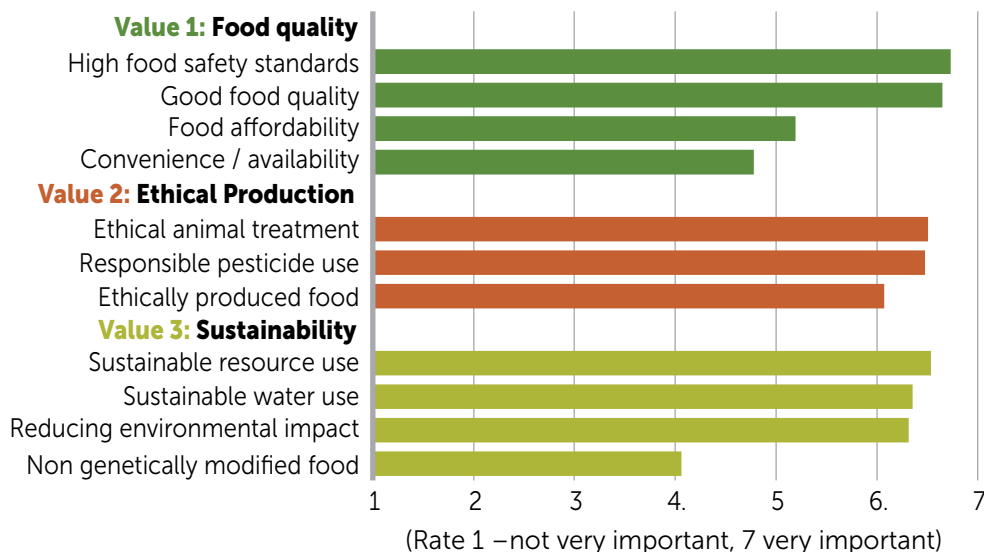
#	Comment
77	We are fearful that protesters will enter our workplaces and cause injury to animals and/or people.
78	I'd try and outline the long-term trend lines and the potentially disastrous consequences of the current trends, then would possibly switch to voter impact at the next election. Sigh.
79	To a politician I would explain that the live export trade needs to be phased out over a period of time. I don't think this industry will survive and therefore producers need support. People don't like change but this is happening so we may as well get on the front foot. For surgical procedures, explain industry is constantly working on research to improve practices, we need more funding for this research to enable change to more socially tolerable practices that are economically viable and practical for farmers. Also need to explain why these practices are required. If you can't explain why a practice is needed in a way that makes sense, the reality of it is that this shouldn't be a practice used for example flank spaying - there is no reason this method should be used now over a less cruel technique.
80	Without establishing a shared value in what we do, community trust will not allow the industry a licence to operate.
81	The public mistrust of herbicides could lead to a ban of using certain products in WA farming, which would have negative impacts on profits, but also potentially the environment and supply of grain. Removing herbicides from the tools farmers can use means that farmers may have to use older practices like tillage for weed control. This would have a negative impact on soils and could lead to longer-term problems in terms of erosion issues. In terms of profits, if yield is affected because herbicides can't be used as one of the tools for weed control, this would lead to less grain being harvested and therefore less profits. It could also impact the cost of export products, making them more expensive and less attainable for people in poorer countries who really need food security.
82	On alcohol and health-related issues WA producers need to position wine as a high value, experiential food product. Align with other premium foods to present a sensorial experience that is not focused on consumption. Work proactively with all government agencies to communicate this and encourage responsible consumption. Push back on highly negative, prohibitionist policy. Highlight the regional value of wine production. While not in the same level of risk as tobacco, the end-point for alcohol could be similar if rabid health advocates drive policy.
83	Activists have been hugely influential in the political space and industry has not been good at telling their story.
84	Reality and perception need to be pro-actively managed to negate impact on farmers and livestock.
85	<p>WA already has stringent regulations for all levels of production, as does Australia comparative to much of the world it competes with. We provide food supply security for WA, clean green, monitored, farmed produce of the highest quality. We provide food with the minimum of food miles, low impact on the environment due to our use of naturally occurring rainfall largely in situ. Our labour laws ensure we have an ethical source of staff and employment conditions.</p> <p>Should producers lose social licence or further restrictions be applied (many of which are already impractical or unworkable) simply put, we begin to erode all these benefits for all West Australians.</p> <p>Our WA economy benefits by a strong agricultural industry - whatever scale or agricultural enterprise, each are businesses providing employment, geographical spread of population through our vast state, nurture the environment they live in in sustainable systems for the future and contribute to vibrant country communities.</p>
86	Given the wide disconnect probably with some difficulty! An industry forum possibly with producers who not only have issues but potential problem solving solutions as well.

Q7. On a personal level, when thinking about your values around food, farming and fishing, how important are the following to you?

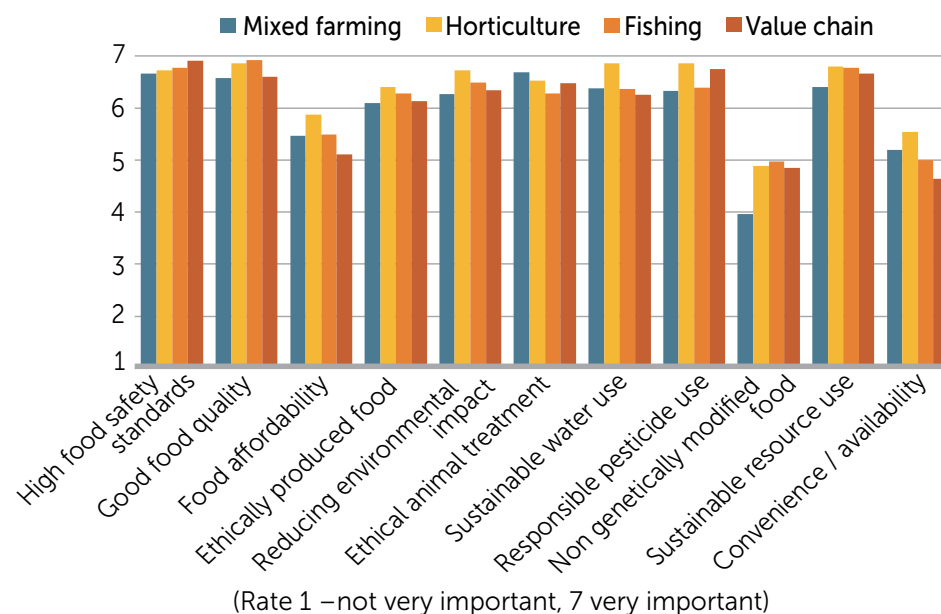
The Participants were each asked to rate a range of values: on a personal level, when thinking about **your values** around food, farming and fishing, how important are the following to you? (Rate 1 – not very important, 7 very important). The responses were then grouped into the key values of Food Quality, Ethical Production and Sustainability.

- Food rated very highly for safety and quality, less so for affordability and convenience.
- Ethical animal treatment and food production and responsible pesticide use is highly regarded.
- Sustainability of resources and minimal environmental impact are most important.

Non-GM foods, convenience and availability were described as less important by the industry Participants. There was little difference between male and female respondents with the exception of a small difference around food affordability.



Comparing across industries showed little variance with the exception of mixed farming's view on GM.



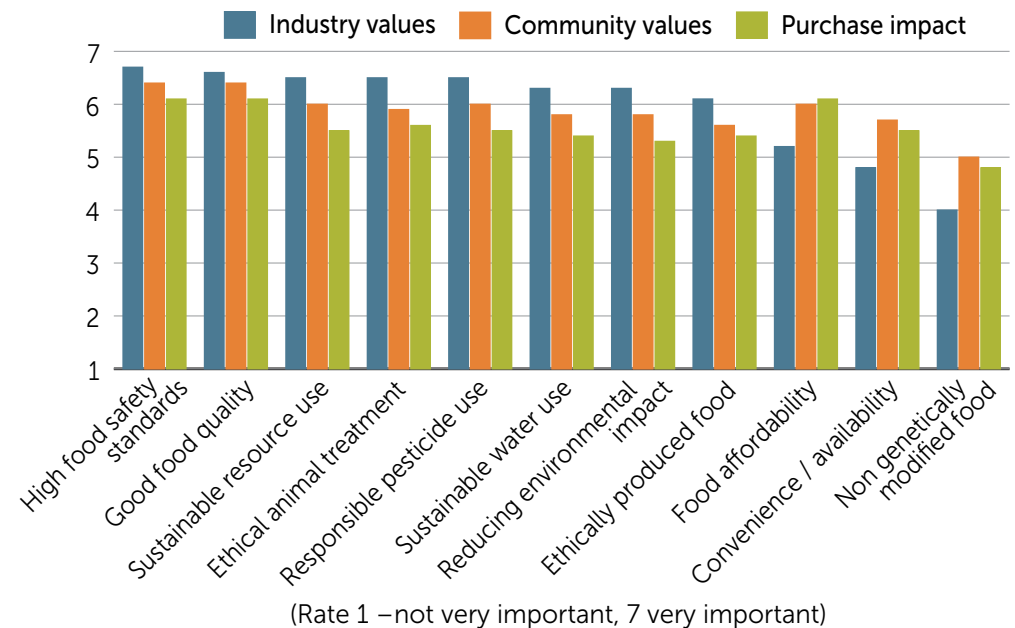
Shared values between the Producer and Consumer will build trust

In a comparison of the Primary Industry values with those of the WA Community values as determined in the Metrix Consumer Perceptions Survey, there is significant compatibility over many values. Industry values across food safety and quality, resource sustainability and ethical animal treatment each register a higher or similar degree of importance with the community.

The food affordability and convenience values are rated higher by the community responses. This indicates there is potential to better engage with the supermarkets and work together as a food industry.

Good quality, safe and affordable food is paramount for all. The indication that there are a range of similarly held personal values across the primary industry sector and the community is a very strong foundation upon which to build future dialogue.

Understanding the shared values between the community and primary industries is the foundation of building trust in practices and behaviours. Industry will need to listen to the community to understand how to better explain improvements in production standards and processes.



Industry - Agknowledge Q7. On a personal level, when thinking about your values around food, farming and fishing, how important are the following to you?

Community Values Metrix Q7. When thinking about food, farming and fishing, please indicate how important the following are to you personally.

Purchase Impact Metrix Q8. When thinking about food, farming and fishing, please indicate the level of impact each of the following has on your decisions when you are buying food.

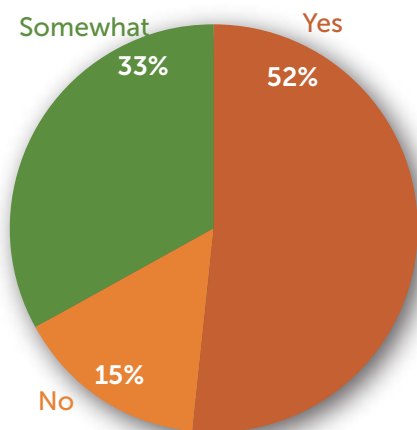


Q8. Do you believe your WA industry or the areas you are involved in, is aware of the impact that public acceptance of your industry's practices may have in future?

This bracket of questions is designed to understand just where industry thinks it is positioned from its view from 'inside' the farm sector and are the current farm and fishing practices meeting public expectations?

The question around current practices is clearly front of mind with the study Participants. The practices from animal management, chemical use, labour management, land sustainability and resource management are all hot topics. Over half of the Participants are fully aware of the impact of not addressing some of the public perceptions around industry practices, however 15% remained unclear around the potential impact that the community could have on future operations.

Perception of the impact that public acceptance of your industry's practices may have in future?



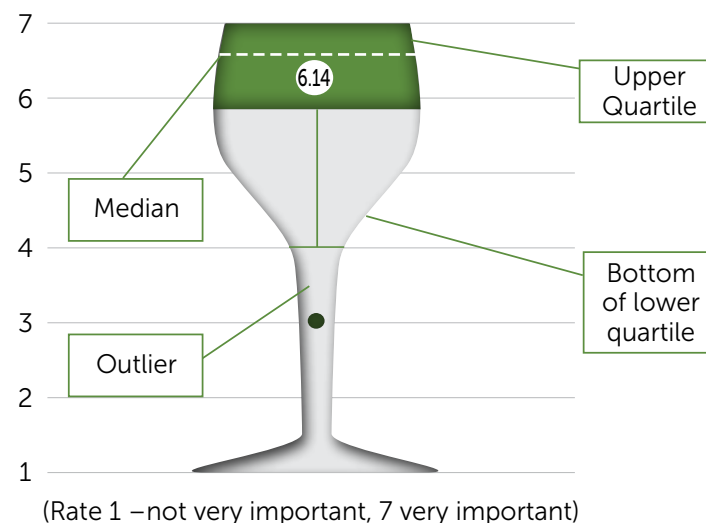
Q9. How concerned are you about the impact public acceptance of your industry's practices may have in future?

It appears the general opinion is that the majority of the public are supportive of farmers when properly informed, and industry should ignore and not engage in public conflict with the activists. However, the level of concern is very high as indicated by the average rating of 6.3 out of 7 as indicated in the graph.

When asked what are the practices that may need to be addressed to improve the public's perception and acceptance of your industry, the key responses included:

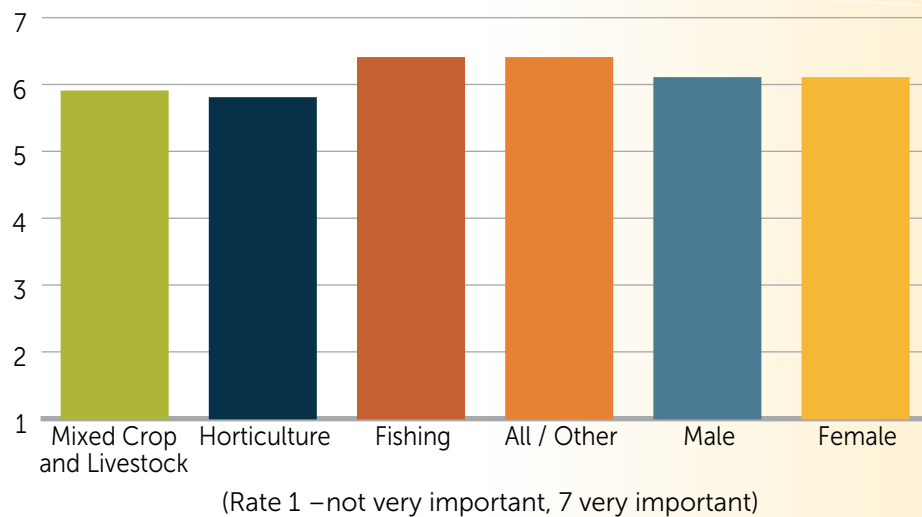
- ✓ *Without establishing a shared value in what we do, the community will not trust primary industries.*
- ✓ *Be transparent, open and honest about what we do and why we do it.*
- ✓ *Improve communications to explain the improvements in production standards and processes.*
- ✓ *Engage with retailers to provide balanced messages.*
- ✓ *Industry collaboration is key - a peak body can't do it alone.*

Concerned about the impact public acceptance of your industry's practices may have in future?



The responses showed very little variance when analysed by industry or gender and the responses are universal around a shared concern for the impact that poorly understood practices or activities can have on an industry.

Concern about the impact public acceptance of industry's practices may have in future? By industry and gender



Q10. What are the practices that may need to be addressed to improve the public's perception and acceptance of your industry?

TOPIC	CITED
Develop community understanding	66
Public education / engagement / interaction	20
Transparency, open and honest - what we do and why we do it (admit mistakes and prevent it from happening again)	10
Change how we communicate	10
Self-promotion of farmers / fishers of good practice to consumers / government	7
Promotion of industry success stories by industry and government	4
Importance of community trust / awareness of changes in public perceptions	3
Greater engagement with students	3
Alignment of farmer and community values	2
Social licence measurables	2
Offer up intelligent well-informed people for the media	1
A dedicated campaign	1
Do not engage in public conflict with extremists	1
Less defensive / argumentative position	1
Without establishing a shared value in what we do, community trust will not allow the industry a licence to operate	1
Ethical animal treatment	46
Animal welfare	21
Mulesing	9
Live export	8
Livestock transport	6
Feed lotting / confinement feeding	1
Drought feeding	1
Maintain markets for bobby calves / grown out dairy stock	1
Egg / chicken industry - males	1

TOPIC	CITED
Business of farming	25
Labour management - availability, hire workers according to law / payment of staff	4
Educate producers about importance of communication and marketing message	3
Industry collaboration (across sectors)	2
Workplace Health and Safety	2
Marine plastics	2
More accurate and professional fertiliser applications	1
Reduce stubble burning	1
Setting appropriate standards and adoption by industry	1
Capacity building in delivering a professional and engaging Agritourism experience	1
Management of dairy effluent	1
Credible honey standards and testing policy	1
Public awareness of importance of bees for food production	1
Subsidies for organic farmers and their produce	1
Better research into organic / biodynamic farming	1
Better information for farmers to aid transition to biological farming	1
Fish during the week and not on weekends to avoid confrontation	1
Practices are good - understanding or explanation is poor	1
Responsible pesticide use	20
Chemical residues	16
Glyphosate use	4
Connection to food	12
Food labelling / integrity / traceability	3
GM technology	2
Alternative packaging options	2
Labelling - health warnings	1
Quality of food production	1
Remove cheap wine (tax reform)	1
Food wastage	1
Retailers reduce imported produce (as it reduces the price of local produce)	1
Environmental impacts and climate	12
Environmental sustainability issues / NRM	8
Environmental controls / management	4
Resource / Water access	4
Resource sharing	2
Water - responsible use	1
Water efficiency	1

Key respondent comments

Respondent #6

- Industry collaboration - the peak body can't do it alone - we need to ensure industry men and women are educated (about consequences) and on board!
- Measurables – we need information / studies to calculate social licence measurable.
- Transparency – if industry is more open and honest, theoretically there should be less trust issues with the public.
- Provide industry with more opportunities to build trust i.e. festivals events / social media / sharing of stories.
- A dedicated campaign that addresses negative perceptions (with industry involvement).

Respondent #21

Live export: firstly, the images of poorly treated sheep on boats is extremely damaging to the brand of Australian agriculture. The work that the government and industry have done to ensure better treatment of animals is fantastic. The support of more processing in WA is important and the government can further help by policies to assist in labour supply issues. But support of live export is important to service part of the production sector that produces an animal more suited to a live market. It also is an important relief valve in a poor year when farmers need to de-stock to avoid animal welfare issues and erosion. Farming systems are very much set up now to be flexible with stocking densities dependent on the variations in the climate from year to year. To do this we need options to sell stock. Those options do not always exist domestically.

Big Farms: industrial farms often have the resources to invest in better farming techniques that both increase production and sustainability. They are often more productive per hectare, increasing our ability to feed the planet. They can often afford to employ support services such as agronomists, advisors, traders etc.

Glyphosate: farmers have three options for removing weed burdens prior to planting crops. They are cultivation (which causes soil erosion), Paraquat (an S6 chemical, recognised as one of the most dangerous chemicals used by Australian farmers) or Glyphosate (one of the safest chemicals used by Australian farmers). All chemicals are dangerous and need to be applied with care. Losing the ability to use glyphosate in the WA system would dramatically reduce productivity and increase soil erosion. There are two uses of Glyphosate: first is to remove weeds prior to sowing, the second is to desiccate the crop prior to harvest where the crop has set seed and the weeds have not yet set seed. I believe it is the second use of glyphosate that is of most concern to customers as it has the potential to result in chemical residue on their food. I believe that using glyphosate for desiccation is a practice farmers in Australia could give up as it would give us a point of difference with some of our competitors who desiccate summer crops to ripen crops prior to snow fall.

Respondent #39

Packaging definitely in the short term but this is a furphy - the public (and retailers) just want the guilt-free box ticked, but aren't addressing the real footprint e.g. single use cardboard punnet to replace rigid plastic.

Respondent #40

Ignore and do not engage in public conflict with the extremist protestors, educate the general public and expose how protesters are funded and operate - I feel the majority of the public are supportive of farmers when informed properly. The minority is having a say, we need to respond to that. Private landholders have a right to farm how they want to farm.

Respondent #41

Get fishermen and farmers (primary producers) off their bums and get them to self promote not only to the consumer but also to their local members. Also get DPIRD to openly promote success stories when the commercial sectors are managed under world's best practice and doing the best in the world at producing fresh local and sustainable products.

Respondent #63

To clarify this question addressing the issue means to me that we become proactive in our communication rather than always being the respondent or being reactive. In my role with Careers in Grain what has surprised me is agriculture's minimal focus on the next generation in terms of attracting the new entrants to agriculture. At numerous career days throughout the state, ag is not being represented so we should expect what we give, that is not a lot. The same applies with the trust in agriculture. If we don't have a voice and rely on long past conventions of how ag is perceived then we deserve what we get. If we are to attract the best talent, we must have a voice that demonstrates that as an industry we are proud of who we are, custodians of the land, are committed to sustainability, ethical and lawful practices; have a role in feeding the world and making this world a better place. That's a powerful message to deliver.

Respondent #78

My industry is all about social and ecological restoration - we're doing fine, we just need to keep scaling up. Public perception and tangible support are on a steady increase.

Respondent #81

I think because we advocate for a variety of farming practices for weed control, if herbicides were banned in some capacity, we would need to change our messaging around that. However, we are not involved in the safety of herbicides, so we are limited in how we speak about it in this capacity.



Q 11 How prepared is your industry to work together in WA to address issues that may help to improve its social licence and the public's trust?

Q 12 How prepared is your industry to work collaboratively with other industries in WA to address issues that may help to improve its social licence and the public's trust?

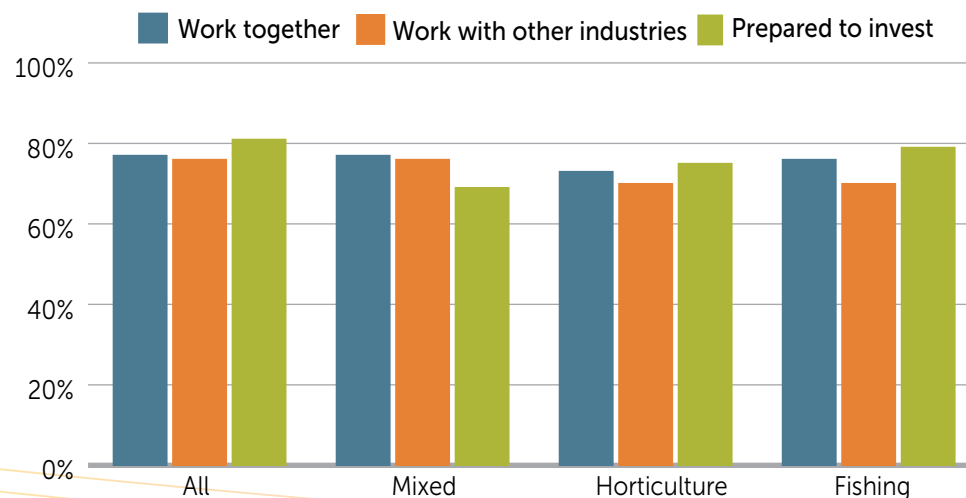
Q 13 Is your industry prepared to invest to manage its own social licence for the WA industry's specific needs?

Currently there is a wide range of opinion inside the various industries when discussing collaboration for addressing issues or understanding their readiness to invest in this development of trust.

Preparedness to work together inside the respective industries was overall reasonably high, however this was not universal with horticultural industries having a range of diverse 'crops' which leads to a reduced alignment of effort. Both horticulture and fishing have indicated that the level of across industry collaboration is a problem area. This would indicate that to effect any change, there is a need for internal discussion that demonstrates the merit of a shared voice through collaboration.

There was a strong overall indication that all of the primary industries are prepared to invest in managing social licence, however mixed crop and livestock producers are not so driven to support this spend. The indication is that these producers currently invest a significant amount with their R&D levies and believe investing in building trust and social licence with consumers should be a part of the mandate for the respective Research and Development Corporations.

Industry preparedness to invest to manage its own social licence for the WA industry's specific needs



Q14. What do you believe may be the consequences of your WA industry not managing its social licence / trust / public perceptions?

Consequences of not managing social licence, trust or public perceptions

When asked what may be the consequences of your industry not managing its social licence, trust or public perceptions there were many areas identified. The consistent points across the industries included:

- Consumers and the general public boycotting a practice or industry with little factual foundation.
- Continued lowering of price margins as more ethical producers are sought by consumers.
- The live export trade could end within a few years.
- The safest and least expensive chemicals may no longer be available.
- Loss of access to community owned resources.
- Pressure on governments to make decisions which negatively affect our industries, and increased regulation.
- Consequences ultimately affect all West Australians if we lose our food security and reliable, affordable, quality food grown sustainably here in WA.
- Without uniting as one cohesive group, we will continue to work in silos and whilst we may make change over time by 'chipping away', the impacts are going to take much longer to come to fruition.

Key respondent comments

#	Comment
1	Regulations will be imposed.
3	Increasing government regulations, removal of access to ag chemicals, outright bans.
4	Lots and lots of vegetarians.
5	Consumers and general public boycotting a practice or industry with little factual foundation.
6	Will result in a steady continuation in decline of public / community trust. A decline in public trust / support will result in a decline in political support. Lack of political support will result in closure of fisheries and (very) limited access to 'community' resources.
7	We may have our access to labour and water resources further limited.
8	The government will superimpose across-the-board regulations.
9	Regulatory changes, more greenies / vegetarians.
10	May reduce and/or affect our business, detrimental effects to business, potentially less water available, more restrictions.
11	Loss of market / jobs.
12	Public revolt, reduced markets.
13	I think they will all see sense and it will calm down some time. It is just a phase at the moment. Maybe there may be regulations put in place but I feel confident there are enough stop gaps in Australia. Our biggest issue is external markets - if we don't respond to the consumer wants then we will lose markets and in particular export markets. It doesn't matter what we know about glyphosate, it is not going to change the public's perception - we need to respond by making sure we are careful in how we use chemicals and make sure our residue limits are very low and we are sustainable and being good custodians.

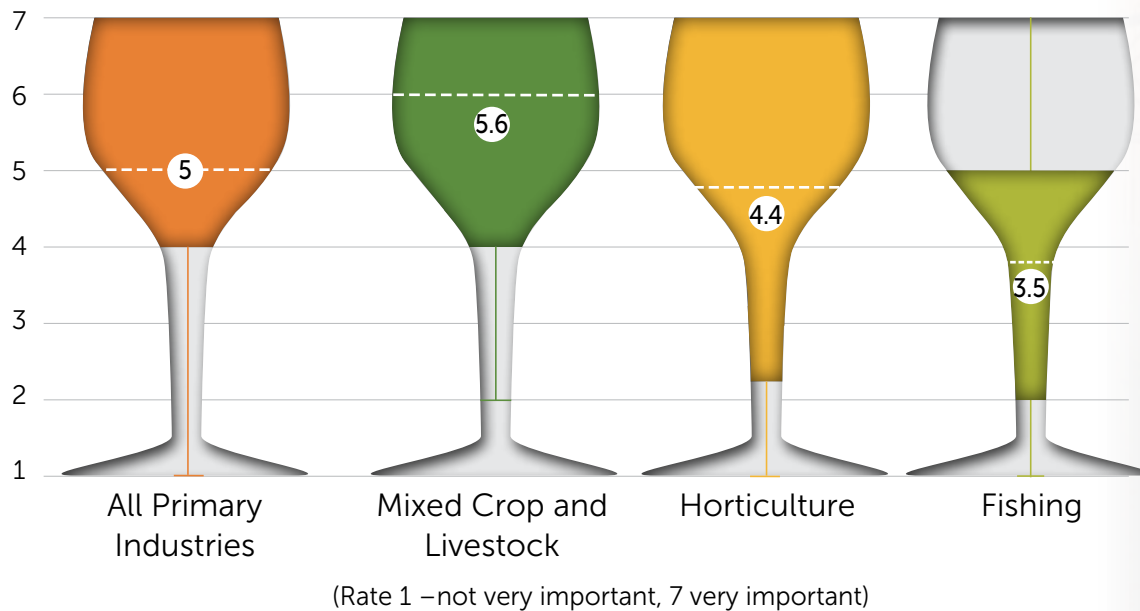
#	Comment
14	End of industry. Maintaining social licence is as important as maintaining fishing licences, no less.
15	Increased government regulation is bound to occur.
16	Long term viability for small scale / boutique businesses.
17	Continuing activist incursions. Possibility of niche brands in the market disrupting orderly marketing. Declining per capita consumption.
18	There is no option to not manage our social licence. The future of agriculture is in the hands of social licence and it will impact food availability and the health of global populations if it is not managed by our industry. WA is fortunate to be isolated by distance and space which can be used as an advantage in biosecurity, carbon neutral farming and innovation.
19	People will support political parties with policies that do not allow the necessary farming practices such as glyphosate use.
20	Risk of loss of social licence and curtailment of industry and employment, which would also curtail practical local action in response to the challenges of climate change.
21	We lose the trust of policy makers to allow us to manage our own industry resulting in policies set by others imposing restrictions on us and the way we farm.
22	Deterioration of market volume and price.
23	Regenerative Agriculture is going to take over (not certifiable yet - a movement that looks at sustainable practices not certified organic). It has a lot of private sector funding.
24	Industry cannot bury its head in the sand on this. We need to be very aware of the impact of 'squeaky wheels' when the often silent majority may be comfortable with the status quo. Industry needs to do more in terms of showing the reality of farming and not leaving a vacuum that can be filled by misinformation or selective use of information. Transparency and accountability are important.
25	Complete loss of public support, increased red tape, levies and scrutiny, which leads to decreased production and reduced animal welfare due to rules implemented by those who do not understand the need for certain practices/management.
26	Loss of trust can lead to boycotts and loss of support from the community. Continued lowering of price margins as more ethical producers are sought by consumers.
27	Decreasing farm gate returns.
28	Loss of access to a community owned resource. Increased imports. Stagnation of aquaculture investment.
29	Erosion of trust leading to poor perceptions of the industry, with flow-on effects on investment and marketability of product.
30	This is not a comment on where I would like it to be but where I believe it is. I am not sure that it will make a huge difference as WA is not marketed per se in most of our products, the exposure is that WA is more heavily reliant on export customers but needs to appease constituents of the nation that we produce in.
31	Lose local capacity to service market demand.
32	Consumer reluctance to engage with our products.
33	Dropping sales, reduced demand and reduced prices. End of industry.
34	The public will be misinformed as to the operations and will be ill informed.
35	Legislative changes such as minimum unit pricing of alcohol. Loss of customers to other regions/countries that have strong sustainability messaging/practices.
36	Licence to farm similar to Europe, further lack of trust with consumers impacting on the price they are willing to pay.
37	Eventual demise.
38	Closure of industries, unable to attract workforce, poor perceptions, amplified disconnection, vandalism / trespass.

#	Comment
39	To be honest I see an ugly pinch point coming as our industry simply does not have the funds to manage its social licence effectively. Social licence to produce food boils down to increasing expenses. Without corresponding rises in returns (currently impossible due to downward price pressure from falsely cheap imported produce and market 'interrupters' e.g. Aldi) the critical mass of locally produced food will fall, or at least certainly diversity of locally produced food at chain store commercial levels will drop to favour high-returning lines e.g. berries, avocados. Climate impacts within 10-20 years will then further dictate outcomes.
40	Continue to be exposed to the minority view and that behaviour has potential to influence public thinking - we do need to tell our story. People are becoming aware; on one hand they want a transparent and quality food industry but on the other hand they don't want to pay it.
41	Gone - recreational sector takes over - greens win too.
42	Lose credibility and potential high value growth export markets.
43	Loss of market, further loss of trust within the supply chain – industry will be forced to do things, more regulation upon us because we are not proactive ourselves.
44	Public will seek alternatives i.e. soy milk.
45	Cessation of the industry.
46	Decline in public faith in ag products, reduced demand for locally grown products, boycotts.
47	Unrelated and unreliable information.
48	Pressure on governments to make decisions which negatively affect our fisheries.
49	A swing against eggs for other protein sources.
50	Ongoing diminishing trust of food and fibre production in WA resulting in potential lessening demand for our products, loss of markets and loss of future potential workforce therefore impacts on regional communities.
51	The live export trade could end within a few years. The safest and least expensive chemicals may no longer be available.
52	WA dairy farmers are experiencing an extended period of low financial performance. This is particularly hard if on top of that you are battling public outcry. With farmers in a delicate financial position, instances of farm invasions can be the tipping point that says 'enough is enough. We're out of here'.
53	Harder to farm, more outside influences.
54	Increased regulation, reduced market opportunity, further loss of farm owner's ability to control their farming practices.
55	Villainised through social media for being portrayed as not ethically producing products.
56	I think the large majority of the WA public will always buy dairy products. There may be a small percentage of the market that adopts vegan dietary habits.
57	Specific beef sector values, profitability, supply chain capacity, current sustainability, employment
58	Lack of trust from the public.
59	Dire.
60	In the absence of industry doing 'nothing', I believe that the expectations will continue to increase, although not necessarily based on fact or information. This could be disastrous if not addressed.
61	Well you must live with the consequences.
62	Without uniting as one cohesive group, we will continue to work in silos and whilst we may make change over time by 'chipping away' the impacts are going to take much longer to come to fruition.

#	Comment
63	Losing the right to farm, process and trade. This then has an impact on retaining talent in ag.
64	Increased power to urban electorates
65	Political parties stop listening to industry and regulations / policies are changed without consultation with the industry which will affect farming practices without enough time for the industry to change the way we farm, and in turn it becomes unviable to farm.
66	Loss of resource access. Challenging local markets. A loss of political support.
67	Not managing social licence will result in agriculture losing its relevance to future consumers.
68	Lack of available sites for aquaculture.
69	Someone ill-informed will make the decisions for our industry.
70	Less access to markets and changes in management forced on farmers not playing their role.
71	Allow vegans to misinform the public as to what farmers are doing. The truth means nothing to them. Our industry will never collapse but it would make it harder. Our gates are locked, they now use drones. We have a good record of managing day old chickens, and we would lose the time and effort spent and capital invested if we didn't look after them; they are treated with the best of care. Politicians are making trespass laws more meaningful.
72	Fewer piggeries, livestock and rural transporters.
73	Farmers will come under more pressure and public integration.
74	Losing the public's trust in the organisation.
75	Failure to do so could end business or people will have to be able to diversify into other products.
76	Increased alternate sector and government interference due to inaccurate information and loud often minority public pressure.
77	More regulations will be introduced, controlling our operations and taking our time/energy.
78	A key issue for us is rural councils over favouring agriculture and frowning on large scale restoration plantings, despite the way agriculture has ripped the guts out of rural populations and communities.
79	More rigid, bureaucratic and difficult legislative arrangements, more control, less trust, potentially even making it too difficult to do business.
80	Loss of access to markets, loss of access to tools, loss of market diversity.
81	I think we could be looking at very different farming practices in the future which don't include herbicides if social licence isn't acquired.
82	As a non-essential food product, the risk is reduced access to required resources (land and water) reduced market access and a highly regulated environment resulting from extreme health lobby policies.
83	Banning of live sheep trade.
84	Will become a problem for premium export markets (can't effectively verify/demonstrate sustainability credentials).
85	Increased regulations and licencing. West Australians will have to bear the cost of increased costs of production/produce as a consequence of any increased regulation, which in turn leads to not only expensive local produce but it becomes even less competitive in world markets where many of these regulations do not apply. The consequences ultimately affect all West Australians if we lose our food security and reliable, affordable, quality food grown sustainably here in WA.
86	It's hard to determine because the social licence/public perception, as with the political landscape, is constantly changing. A strong, stable, consistent political leadership is crucial.

Q15. How prepared is your industry to adapt to Western Australia's changing climate?

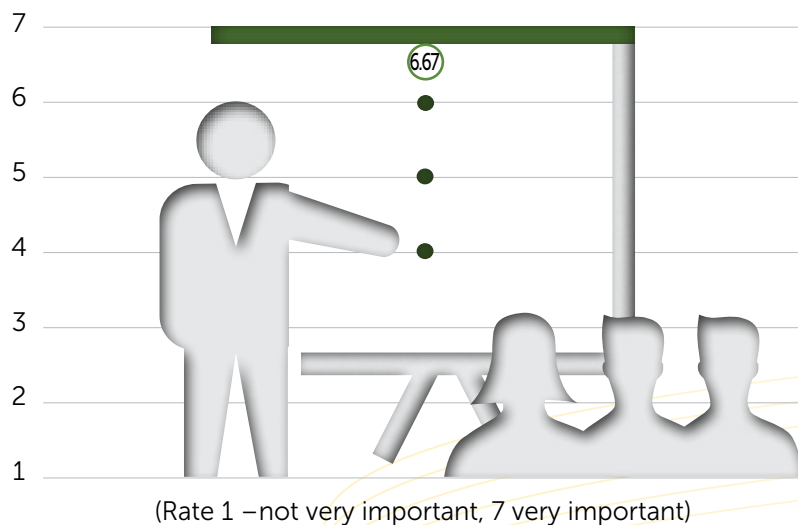
All industries indicated a reasonable level of preparedness to adapt to WA's changing climate, however the mixed crop and livestock sectors indicated a higher degree of preparedness than either the horticulture or fishing industries. The wide variance in horticulture could be indicative of the wide range of crops and production systems, while fishing may relate more to the realities of having to work with changing water temperature and current movements.



Q16. How important is it for Western Australian students to be informed about and connected with the local food, farming and fishing industries?

The interviewees were asked to rate the importance of investing in the development of knowledge and understanding of WA food, farming and fishing industries with students. A significant majority as demonstrated in the graph below totally support the need to inform and connect with the next generation.

Importance of WA students being informed about and connected with the local food, farming and fishing industries



Q17. What are the barriers for your industry in attracting young people to careers in the food, farming and fishing industries?

Discussion around the barriers to attracting young people to the industry identified that while industry does not communicate the diversity of opportunities available in agriculture and fishing and the potential salary, industry also hasn't marketed the industry to be attractive enough for young people to be excited about. A big barrier to this is the lack of awareness of where food and fibre comes from, and if industry can connect with students at an early age and maintain the connection in their later high school years, there is a better chance of attracting bright young minds to the range of primary industries. There is also the opportunity to market the industry as a 'humanitarian' pathway - helping to feed the world and addressing food security issues.

Participants were also asked to identify key barriers which included:

- Negative perceptions of the industry.
- Lack of awareness of career options.
- Reduce physical and social barriers of isolation.
- Lack of cohesion for the primary industries sector.
- Reluctance of older demographic to empower younger generations.
- No first 'touch' with regional Australia.
- Not competitive remuneration levels.

Key respondent comments on barriers to attracting young people to careers in the sector

#	Comment
1	Positive media coverage, first hand experiences.
2	Run graduate programs, apprenticeships etc.
3	Pay more.
4	Onsite training programs for young people that lead to qualifications and future employment opportunities.
5	Stereotypes about farming – that you need to inherit land, an ag career is just farming.
7	Pay and conditions.
8	Isolation, limited education options for children, lack of social opportunity.
9	Low salaries, lack of agricultural training opportunities, lack of knowledge of careers in the food, farming and fishing industries.
10	Land values, potentially mining taking away workers, the country lacks infrastructure to cater for young people.
11	Career opportunities and wage conditions.
12	Media concentrates on the negatives, disconnect between parties, financial returns.
13	Isolation and job security.
14	Perceptions about the people who are involved. Perceptions about sustainability. Barriers to pathways to investment for young people.
15	Distance and isolation, lack of understanding of the professional nature of the career paths.
16	The biggest barrier is being able to generate a reasonable income from small scale business - tourism, hospitality or agriculture.
17	Longer-term profitability to support higher wages. Perception of hard and dirty working conditions.
18	Uncertain future. Lack of educational accessibility, opportunity and pathways in WA.
19	City kids have very little exposure to these industries so it does not get on their radar when making choices.
20	Ignorance of forestry, the diversity of careers, and legacy of negative perceptions of careers in forestry. Plus, general absence of focus in the education system on technical and trade careers.
21	Our embarrassing DPIRD offices. Why would any graduate want to work there? Our safety record. The perception that all farmers are battlers. The poor public face of farming.
22	Financial viability.
23	There are no jobs and no money and no-one to mentor young people. There are a lot of people holding onto IP and not sharing it.
24	Young people are being attracted to careers in agriculture now. Visibility of the wide range of careers in ag is important. Financial return can be a factor. It is important that food is fairly valued.
25	Lack of exposure and understanding of the jobs available. Not wanting/having experienced living regionally/rurally.
26	Low margins, high upfront costs to establishing a business, prohibitive time commitment required, misperception of a stagnant work environment that lacks innovation.
27	Funding.

#	Comment
28	Demonstrating pathways to a viable and respected career in fishing. Reluctance of older demographic to empower younger generations with decision making and participation.
29	For aquaculture, the current lack of job opportunities and training not properly aligned with industry needs.
30	For many young people they have no 'first touch' with regional Australia so it is easier to move with what is familiar or comfortable. In our business we try to embrace opportunities to provide a positive 'first touch'.
31	Organic agriculture - its systems and practices - are not part of our education institution's curriculum at any meaningful level. The organic system is under-resourced at a R&D level to overcome production barriers, has poor policy support within key departments and market development support and is often culturally marginalised because of its values and practices. Many skills are leaving the industry so maintaining critical mass and open pathways of engagement are barriers to growth.
32	Traineeships and government support (promotion, funding, scholarships).
33	Remote locations to work in. Farming not seen as sexy or exciting. Physical hard work and hard conditions. Low pay as we are price takers and cannot afford high wages.
34	Its hard work and doesn't pay huge amounts of money for the labour involved compared to other industries.
35	Coming out of a period of oversupply. Issue is currently with providing education - closing of Curtin Uni wine/viticulture courses.
36	Image of agriculture is a farmer and plough or big machinery. Need to promote all aspects of the food chain.
37	Bloody hard work.
38	Lack of cohesion for the primary industries sector, lack of investment in education - both in schools and the general community.
39	Remuneration (mining is a key competitor, avocado/high value ag also have capacity to pay more) having to work hard from the 'bottom up' - many want/expect to jump straight into management.
40	Lack of awareness and explanation of those opportunities - career paths, disconnect with food/ ag industry, cost of living and working in the country, and the wages disparity to the mining industry. Having to send our kids away from the country to school for grade 7 also has massive implications on rural communities - taking wives away, sucking funds out of the community etc.
41	Cost of getting in.
42	Training and resources.
43	Perception of the industry, no money in it. Other options they have which are promoted more. Lack of clear care.
44	Long working hours and lower pay rates.
45	Negative public sentiment already existing. It brings adverse reactions when you generally mention the industry.
46	Lack of a cohesive integrated program to educate young people in this space. I wrote a piece on this topic for Future Directions International (FDI) which I would be happy to share which outlines how we could resurrect a program we ran very successfully in this space in the mid 90's based around the LEAP program.
47	Cost to farmers to employ workers. Younger generation not wanting to engage in physical labour.
48	The work is physically challenging and operates in a remote area. My experience from teaching marine studies students is that they are not interested in doing this sort of work and believe they can earn more and work less in eco-tourism or government. Overseas workers are far more reliable and dedicated.
49	It's a relatively small industry with limited opportunities to progress. However, there is abundant work and challenges for those willing to succeed.

#	Comment
50	Lack of awareness of the options for careers, lack of understanding of universities about what to advise students - gap between universities and careers for uni students, disconnect between industry saying the number of jobs in ag and the reality of how many jobs there are, not promoting the basic jobs that we will need people to do i.e. shearers, labourers - a lot of focus on tertiary end, lack of promoting the economic advantages of working in industry. We have a healthy comparative wage.
51	Lack of understanding or interest in these industries. No idea what is going on. No idea about career opportunities, because the industries are seldom mentioned at school or uni.
52	The image of dairy is that it's all hard work and long hours. By contrast, the large, successful businesses have a really innovative approach to managing rosters and work life balance and people in the system love being there!
53	Low pay levels, not sexy, too controlled.
54	Reputation of agriculture. It is not seen as dynamic, technologically advanced or profitable as it is. The lack of adequate community resources (schools, hospitals, opportunities for teenagers) of some work locations is problematic.
55	Young people aren't interested in putting in the work required to build their way up. It's a first world issue in a lot of industries.
56	Dairy education is a fairly minor component of school education. There should be more careers advice about the opportunities and more vocational support. The industry itself is shrinking in terms of number of farmers so this also makes it hard.
57	Long term employment careers, business profitability, business capabilities, market shares.
58	Rural locations, uncertainty, climate, lack of understanding of opportunities, other opportunities more attractive.
59	High cost of entry.
60	Attracting young people to regional areas and also to what may be perceived as unattractive career paths. Lack of long term security of tenure in fishing licences may dissuade people from investing time and money in the industry.
61	Normal human concern on food stocks.
62	Organic farming is not currently seen as a profitable and rewarding way of farming and succession planning on many organic farms is non-existent. In order to attract young people organic/biodynamic farming must be seen as a profitable, rewarding and highly regarded career. This needs promotion at a higher level.
63	Ag itself is the barrier. Careers in Grain is an example of ag creating an initiative when we convince investors with a compelling investment case.
64	Entrenched attitudes, lack of genuine industry leadership.
65	We do not communicate the diversity of opportunities available in agriculture and the potential salary. We haven't marketed the industry to be 'sexy' enough for young people to be excited about. A big barrier to this is the lack of awareness of where our food and fibre comes from, if we can connect with students at an early age and maintain this connection in their later high school years, we would have a better chance of attracting bright young minds to our industry. We also need to market the industry as a humanitarian pathway - we are helping to feed the world and addressing food security issues.
66	Hard to find the experience employers are looking for. Hard to compete with competitive wages in other sectors.

#	Comment
67	Extremist groups spreading their messages, over-regulation of the industry, lack of engagement with the farming sector and knowledge of its relevance to our daily lives.
68	Lack of suitable aquaculture courses in WA at a reasonable cost.
69	Profitability, lack of capital to be directly involved in farming.
70	Land ownership and pathways for people that do not inherit land to farm.
71	Lack of courses out there. Farming is not seen as attractive.
72	Working on a piggery is not seen as an attractive industry and Australians are not generally prepared for the type of work that is necessary. Overseas workers are far more successful. It is difficult to recruit rural transporters as housing and education in rural towns is often not appealing to families, there is a reasonable amount of negativity directed towards livestock transporters in particular. Not everyone is suited to working with livestock and it is hard demanding work and on top of that there are significant penalties for animal welfare breaches that a driver may be held accountable for but in reality, had little discretion over.
73	Farming isn't perceived as a 'cool' job. Young people are attracted to higher wages and other industries.
74	To let students know that being in agriculture is not purely to become 'farmers' but so much more is available, lucrative salaries and willing guidance from mentors. More Graduate Programs to introduce them.
75	Physical labour and long hours. Also, knowledge of industry; if people aren't educated what is involved in an industry then they can't get an interest in it and see it as a career.
76	Cost of entry, shrinking and increasingly aging workforce due to costs, seasonal working conditions
77	Remoteness, poor publicity, economic (wage competition).
78	Cash Flow. Plenty of young people are seeking to work with us, some are voluntarily until other opportunities come along.
79	Perceptions, limited clear professional progression, limited resources in rural communities, hospitals etc.
82	Career opportunities/remuneration curve; location is largely regional; high proportion of smaller, family owned businesses that do not offer career pathways.
83	Accessible programs.
84	We have a growing number of tertiary students wanting to do volunteer/intern work with us. They are keen to participate further in the industry but are challenged by the lack of options.
85	Hugely expensive yet poor internet and telecommunications is the biggest barrier as it restricts so much that can be done with technology in developing our industry sustainably. Our image as an industry also needs addressing as we meet many students who are keen and well suited to working in our industries, we just need to reduce some of the physical and social barriers of isolation for them to at least start working in rural areas (this is where reliable and cheap internet connectivity is critical). It is also vital that government services at all levels are retained if not strengthened in rural areas (not just the coastal-based cities) to provide realistic employment opportunities for graduates in actual broadacre farming locations.

Q18. Do you have any positive examples of how an industry is managing its public acceptance or social licence well?

There are many positive examples of industry managing its public acceptance well in Western Australia as indicated in the graphic below. Each logo represents a defined activity around a sound interface which influences and provides consumers with a reference point for building their perceptions.

There is a variable position with each initiative and we can see categories around the retailers such as the major supermarkets who are using their consumer facing work to portray many positive aspects of primary production. There are a significant number of accreditations or certifications including earned, self-imposed and global independent third party accreditation.

The WA dairy sector has a consistent message of a local, clean, green and responsible industry, while the wine industry is a high value add product and the industry is very

vertically integrated. Online rural bloggers are providing realistic stories and images of everyday practices. The regional Food Councils in the Gascoyne and Southern Forests have both created a solid position in the metro markets as producer-driven bodies.

In other examples Austral Fisheries has carefully crafted a social licence management plan based on research and science, while the WA fishing industry with its MSC accreditation is on the right track but consumers largely have not heard of it.

The Sheep Collective and its promotion of information on live export is excellent, built out of a crisis issue but sustaining the effort for the long term. Organic Certification is a growing sector and consumers are learning to recognise the certification standards around both organic and biodynamic produce. Bannister Downs Dairy has invested in ethical facilities and environmentally friendly practices, and the Australian Eggs Sustainability Framework is very good.

Education is a priority with some and Perth Royal Show has stepped up its offering as well as having an 'expectation' that Perth consumers will see food and farming activities. Rabobank has a good schools program and Primezone is providing resources for teachers (again industry is not aware of these).

Positive WA examples of managing public acceptance or trust



Key respondent comments on initiatives that influence public perceptions

#	Comment
1	Major retailers addressing the backlash of their monopoly practices that are screwing farmers by featuring farmers in their fresh food ads.
2	Coles current marketing campaign about fish being caught sustainably etc.
3	Indigenous, Same Sex, Rec Fishing, Forestry, Mining, Wine.
4	NTCA and KPCA working with young people and positive marketing strategies.
5	The Sheep Collective, AgConnectWA, Central Station, The Rural Room.
6	Austral Fisheries. Mendolia bait brick. The Fisherman's Daughter.
7	VegetablesWA commissioned an independent academic to develop a report that looked at our national labour issues and provide solutions. This is now being used as a lobbying tool at a national level. The reaction to an illegal worker story in the media is also good.
8	Fishing industry with its marine stewardship is on the right track but consumers have not heard of it.
9	MSC certification - Mandurah Professional Fisherman's Association and Western Rock Lobster Council. Retailers like IGA, Coles and Woolies - using farmers to promote their product and farming practices. The Sheep Collective campaign online.
10	Our company has done a lot of work and value social licence, working with water with restrictions. We have a FB page to update information, e-newsletter, meet with, transparent and open cooperative values open to questions and people wanting information. Hold regular community sessions. Trying to communicate where possible. Need to look at all mediums and print media.
12	Sheep Collective, Farmer Markets, Social media.
13	Poultry industry - RSPCA accredited free-range chickens and eggs.
14	Spencer Gulf Prawn Fishery. They have been doing it quite well for decades. Patagonia fishery, whilst of course not an industry, is a great example of a company which has nailed meeting the expectations of our times (assuming that which they put forward is correct).
15	Can't think of one, but being on the front foot is always good!
18	The new dairy television advertisement tells a great story.
19	Although very late to do so, the Sheep Collective and its promotion of live export is excellent. It's a big change from an industry which has typically been very secretive and opaque.
20	DFES and Volunteer Bush Fire Brigades make excellent use of social media highlighting their emergency response capabilities. Timber industry nationally has had success with the 'Ultimate Renewable' marketing campaign.
21	Austral Fisheries. NZ meat (it's all about grass and meat, and not about the animal). Check out: youtu.be/XsxGYPs2eMg Great to see farmers telling their stories well. Also Grain Growers Limited training up growers to be champions for their industry.

#	Comment
23	Organic Certification; Indigenous Art - certification system - genuine indigenous art and the artist has been proven. FSC - Forest Certification - sustainable forestry.
24	Sheep Collective is doing a great job re live export. Invisible Farmer. More farmers engaging on social media and sharing their stories.
25	Can't think of examples as an industry whole.
26	Within agriculture, Bannister Downs Dairy has invested in ethical facilities and environmentally friendly packaging to produce an excellent quality product that is well thought of in the metro area and has a loyal customer following. This has required significant investment.
28	WAFIC / DPIRD MSC certification across 10+ WA fisheries (\$80%+ of value certified). Austral fisheries - 1st carbon neutral fishery globally, partnership with Sea Shepherd etc. SeSafe safety training initiative.
29	Organisations such as Huon Aquaculture, Ocean Grown Abalone, 888 Abalone and others. Huon in particular has a representative committee where community engagement is enabled.
30	It is a long hard race, and one that is never actually won. For this reason, I don't know of any 'winners' in all circumstances. I think it is about the right message at the right time and committing to work hard not just in a crisis but in the ground work that prevents the crisis.
31	None are doing it well. Apart from the organic sector who operate under a National Standard and have good production/product integrity I cannot think of many that are doing well. 'Social licence' by its nature is a dynamic concept. Unconventional land use (i.e. those systems 'imposed' post colonisation vs indigenous responsibly wild harvested ones etc.) are always vulnerable by their disruptive nature. The question of 'tolerable loss' of natural and social capital is one to ponder alongside meeting our social licence expectations while somehow keeping food affordable and on the table. A wicked challenge. I think that there needs to be a greater level of systems thinking and consumer engagement to overcome the future farm challenges. Currently the level of leadership and trench warfare / dismissive attitude is divisive (such as that experienced around the live sheep export debate and rising toxicology of food concerns). No good will come from that. The game has changed. Social media and a shifting economy have seen to that and the look is not good across a number of farming platforms.
32	Harvey Beef Gate 2 Plate competition, Coles and Harvey Beef Schools Challenge, Perth Royal Show Food Awards. Social media positive stories.
33	We are doing what we can with social media and general media, however it is difficult to get the message out there consistently to all people. I think we are doing an OK job. In general, I think as producers, we are not as active as we should be - but then it is easier to communicate simple messages that are misleading - than the complexities of the challenges that face farmers. Farmers need more support to positively communicate on social media and traditional media. The lack of young people in the industry is a barrier to this.
36	Not really. Rabobank have a good schools program going. We at Stirlings to Coast Farmer Group have partnered with 3 ag colleges to promote STEM and where our food comes from, careers advice etc. Sheep and now beef alliance made a start but it's too little to impact to anyone other than politicians, which is fine.
38	Marketing and consultation need to include a cross section of community in development otherwise it will come across as industry protecting their interests which will have the reverse effect of the intention.

#	Comment
39	No industries as a whole come to mind. Very few outside of small owner-operators, where the far smaller variables make it relatively simple.
40	The farmers markets are good, the quality control systems - meat and wool industry, all the vertically integrated businesses that tell their stories paddock to plate scenario.
41	Mandurah Professional Fisherman's Association - world first in MSC - breaking ground through niche marketing with traditionally accepted low value products seeing them reach higher values than ever. Still here while other fisheries are getting removed by politics.
42	Self testing, transparent and increased investment in technology and R&D.
43	Mining industry - not looked at as dirty mining, got a career and earning lots of money, doing great things for the state. The army - do a great job making their careers look great - adventure and good for the country. The northern cattle industry has done a good job as a whole compared to other ag industries since it got burnt with live trade - trying to improve our general perception to the rest of society - blogs and Instagram accounts. The Sheep and Cattle Collective - still early days but on the right path. In the earlier days, the cotton industry and feedlot industry did a good job with their campaigns.
44	\$1/L milk campaign was very successful.
45	The live export industry has been hardest hit in the agricultural sector around the social licence conversation. This industry has been dealing with it through many different methods, often failing. The latest work being done by The Livestock Collective (including The Sheep Collective and The Cattle Collective) has been the most beneficial. The Collectives have set up a framework for other agricultural sectors to follow.
46	Probably the industry that springs to mind is the nursery and garden industry. Unfortunately, we have seen industries across the sector - energy, water, agriculture, mining step back from a full and comprehensive program to educate the community their respective industries and how they are meeting the sustainability challenges they face in this century.
47	Industry information exhibitions like honey week.
48	Yes, our own industry. We have made an effort to engage with the local community where our fishery operates. We attained MSC certification in 2015 to independently verify that our fishery is sustainable. We ensure our seafood is supplied to local markets and affordable, which is key to public support.
49	Australian Eggs Sustainability Framework is very good.
50	Sheep Collective - I believe the work the MLA has been doing behind the scenes is very effective however a lot of industry isn't aware of it. Other positives - the work of Primezone providing resources for teachers (industry not aware). Individuals who are also stepping up and sharing positive stories. I believe nationally there needs to be an overarching vision of what we are trying to achieve - avoid duplication and ensure anything that is done continues on in the future even when those driving it have moved on.
51	Austral. The company didn't sit back and wait until the public turned on them for fishing toothfish from southern waters. It carefully crafted a plan based on research and science.

#	Comment
52	The Dairy Matters campaign is a great example of how dairy is reaching out to the public.
53	Free range chicken production.
54	Rock Lobster does it well. Many smaller producers (i.e. many honey producers, wine producers, truffles etc.) in the south west have great branding for socially responsible and sustainable industries. Broadacre chemical use justifications of "we need to use them" in face of increased discovery of chemical residues in the food chain is the opposite. Good scientific evidence of safety is the only real answer where it is available.
55	My own company for example. We have reduced our plastic usage in packaging by 80% and have used the media and marketing to exhibit to the public that our industry does care about the environment and the carbon footprint we are leaving.
57	Did have when I was with Alcoa Farmlands, but that has now changed. The northern pastoral has started doing some good stuff. Annabelle Coppin at Yarrie Station is becoming outstanding. Still a lot to do, but she won't give up.
60	Regional France has a very close relationship with the regional fishers and are fiercely protective of their industry and its role.
61	Proactive stories in our overall sustainable fishing.
62	Southern Forest Food Council. Great brand, promotion and from what I understand - outcomes. RegenWA whilst relatively new seems to be having some real impact in WA. Certified Organic Biodynamic WA (COBWA) has the potential once it finds its feet.
63	Mining is an example for WA. They are pro-active in presenting an image to market that demonstrates its importance to the local and national economy, what its products do for its customers and its focus on attracting talent.
64	Definitely the WA dairy sector (inclusive of women in positions of power and influence; supportive and focussed on young industry participants and consistent in its message of a local, clean, green and responsible industry).
65	The Sheep Collective (and Cattle Collective/Livestock Collective) has done a great job so far, although I have only seen it talked about within the industry, not by the general public so it has a long way to go.
66	Third party certification. Communication and marketing alignment. Education in local schools. Supporting local community events.
69	BHP. Being pro-active in the carbon / emissions space.
70	Austral Fisheries are a great example of managing this. Wide Open Agriculture are also implementing a program as well.
71	Free range chicken promotion and RSPCA accreditation.
72	The work conducted by the Sheep Collective is a good example of starting to turn the tide although it is early days. It is very important that the entire industry works together which is why the LRTAWA initiated discussions with grower groups in 2017. It is unfortunate that following the masterclass earlier this year when the WA Agrifood Alliance was loosely re-formed that neither the WA Pork Producers or the Livestock and Rural Transport Association of WA have been kept informed of developments. Both groups were represented at the workshop and held back from nominating for the working group on the assumption there would be good communication and an ability for input. Both groups have much at stake from a loss of trust.

#	Comment
73	Educating the public through good news media stories and farm open days.
75	Through social media we have been able to educate people in what is involved in producing horticultural crops. Also allowing school excursions to educate kids on farming.
76	I think industry is slow to react and are a little lost. Companies like Austral are doing a great job in promoting sustainable seafood and environmental practices. Public perceptions need to be addressed across all levels and all sectors of the public, not just those directly impacted.
77	School books on cotton, Cotton Best Management Practices – myBMP.
78	Renewable energy, which is a rural industry.
79	There are many videos etc. on line, MLA's target 100 program (now defunct), the APL did a good video, lots of farmers sharing positive stories, but need to break through and not just talk to themselves.
80	Social leadership efforts that are being done well include Deanna Lush's work and also the emerging Grain Growers Ltd social leadership program.
81	I think the health industry is doing a fairly good job at countering a lot of the anti-vaccination rhetoric out there. When there have been dips in vaccination rates, the industry has been quick to make it front of mind in the media and counter those claims. There's also a lot more commentators in this space who share the scientific basis behind health issues.
82	Wine is a high value add product and the industry is very vertically integrated. This means the producer/grower is very linked to consumers. We can, therefore, deliver a clear message to consumers about our practices. Theoretically, we should also be well positioned to receive feedback on consumer perceptions of what we do. This should be considered for future work by the alliance. We also strongly link wine consumption to food and conviviality in contrast to other alcohol categories. We are proactive in communicating responsible consumption.
83	The Sheep Collective.
84	The Regen Ag conference (Sept 2019) had 270 industry stakeholders attend and 90 farmers in that mix. They had a positive social licence story to tell.
85	The Sheep Collective is to be congratulated on its initiative. Green Shirts presence online also contributes many positive stories. Online bloggers from rural industries also contribute by providing realistic stories and images of everyday farming practices, particularly animal husbandry.

Appendix 1: The Primary Industries Questionnaire

Food Alliance WA Trust in Primary Production Questionnaire

Agknowledge has been contracted by the Food Alliance WA DPIRD Trust in Primary Production project to test the WA public's perceptions of our food, farming and fishing industries.

Name:

→ The Trust in Primary Production project is funded by DPIRD and supported by a number of industry associations including WA Farmers, GIWA, WAFIC, Vegies WA, Wines of WA, KPCA, GGA and others.

1. Which primary industry are you engaged in?

Please use a X to mark your selection

Cropping	Mixed broadacre	Livestock	Horticulture	Wine	Fishing	Other/All
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

2. What sector do you work in?

Government	Commercial/Agribusiness	Farmer/Fisher	Industry advocacy	Education	Media	Other
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. What do you believe are the major issues challenging the public's trust or social licence of your sector?

Comment	<input type="text"/>
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4. Are these trust or social licence issues driven by International, National or Western Australian influences?

Comment	<input type="text"/>
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5. Are any of the trust or social licence issues you mentioned amplified or more likely to impact the WA industry than in other States?

Comment	<input type="text"/>
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6. How would you explain the specific impact or consequences of these issues for WA industry to a politician?

Comment	<input type="text"/>
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7. On a personal level, when thinking about **your values** around food, farming and fishing, how important are the following to you? (Rate 1 - not very important, 7 very important) Please use a X to mark your selection

Topic	1	2	3	4	5	6	7
a. High food safety standards	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b. Good food quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c. Food affordability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d. Ethically produced food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e. Reducing environmental impact	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f. Ethical animal treatment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g. Sustainable water use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
h. Responsible pesticide use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
i. Non genetically modified food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
j. Sustainable resource use	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
k. Convenience / availability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Food Alliance WA Trust in Primary Production Questionnaire

8. Do you believe your WA industry or the areas you are involved in, is **aware of the impact** that public acceptance of your industry's practices may have in future?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>	Some	<input type="checkbox"/>
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9. On a scale from 1 to 7, how **concerned** are you about the impact public acceptance of your industry's practices may have in future?

1	2	3	4	5	6	7
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Please use a X to mark your selection

10. What are the **practices that may need to be addressed** to improve the public's perception and acceptance of your industry?

Comment	<input type="text"/>
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11. On a scale from 1 to 7, how prepared is your industry to **work together** in WA to address issues that may help to improve its social licence and the public's trust?

1	2	3	4	5	6	7
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. On a scale from 1 to 7, how prepared is your industry to work collaboratively **with other** industries in WA to address issues that may help to improve its social licence and the public's trust?

1	2	3	4	5	6	7
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

13. Is your industry prepared to invest to manage its own social licence for the WA industry's specific needs?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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14. What do you believe may be the consequences of your WA industry **not** managing its social licence / trust / public perceptions?

Comment	<input type="text"/>
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15. On a scale from 1 to 7, how prepared is your industry to adapt to Western Australia's changing climate?

1	2	3	4	5	6	7
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

16. How important is it for Western Australian students to be informed about and connected with the local food, farming and fishing industries?

1	2	3	4	5	6	7
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. What are the barriers for your industry in attracting young people to careers in the food, farming fishing industries?

Comment	<input type="text"/>
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18. Do you have any positive examples of how an industry is managing its public acceptance or social licence well?

Comment	<input type="text"/>
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