

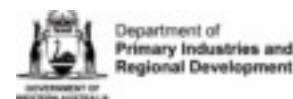
Trust in Primary Production



Annual Conference
13th March 2020

AgKnowledge®

FOOD ALLIANCE WA DPIRD
TRUST IN PRIMARY PRODUCTION PROJECT



Department of
Primary Industries and
Regional Development



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

Three stages of research:

Desktop Study



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A desktop review of current issues, trends, industry data and research efforts, and social licence initiatives from around Australia and best practice international case studies.

Consumer Perceptions



Surveyed the perceptions, attitudes and levels of trust towards WA food, farming and fishing amongst a sample of 1,020 general population from greater Perth.

Industry Perceptions



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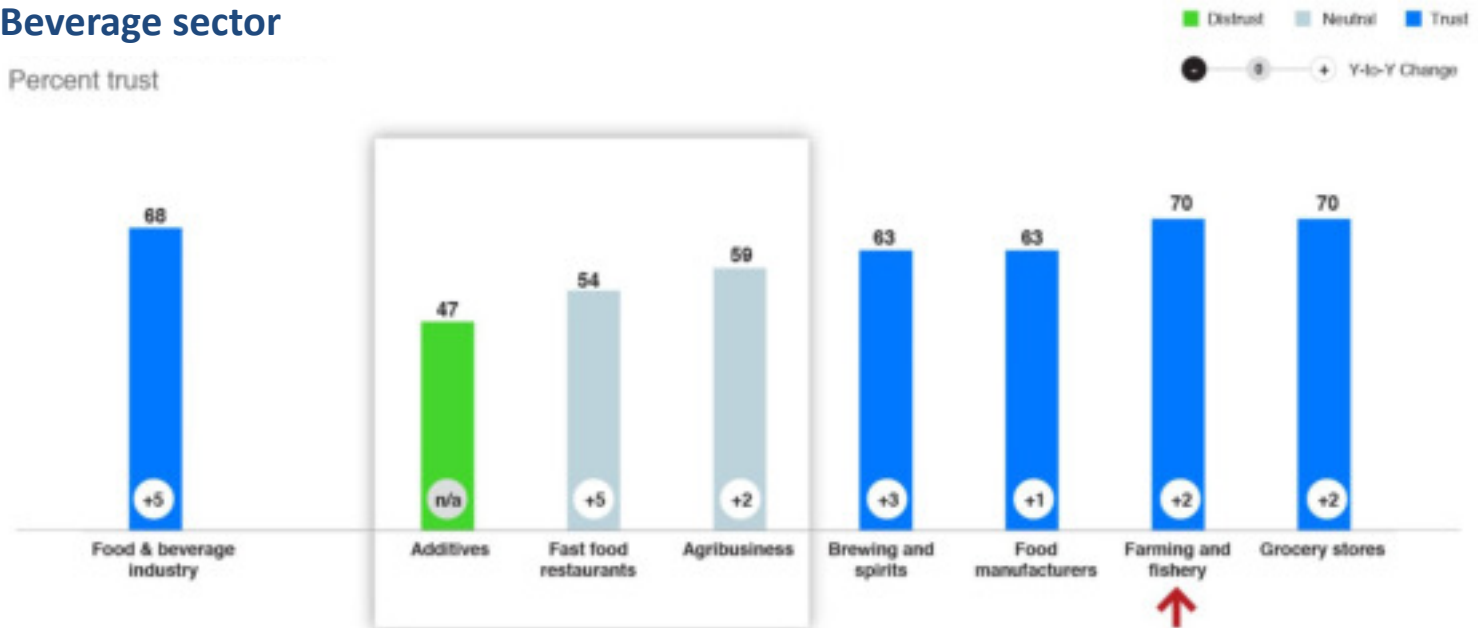
Interviewed 120 WA primary industry 'thought leaders' on engaging, understanding and preparedness to invest in building trust in WA food, farming and fishing.

Trust can be measured

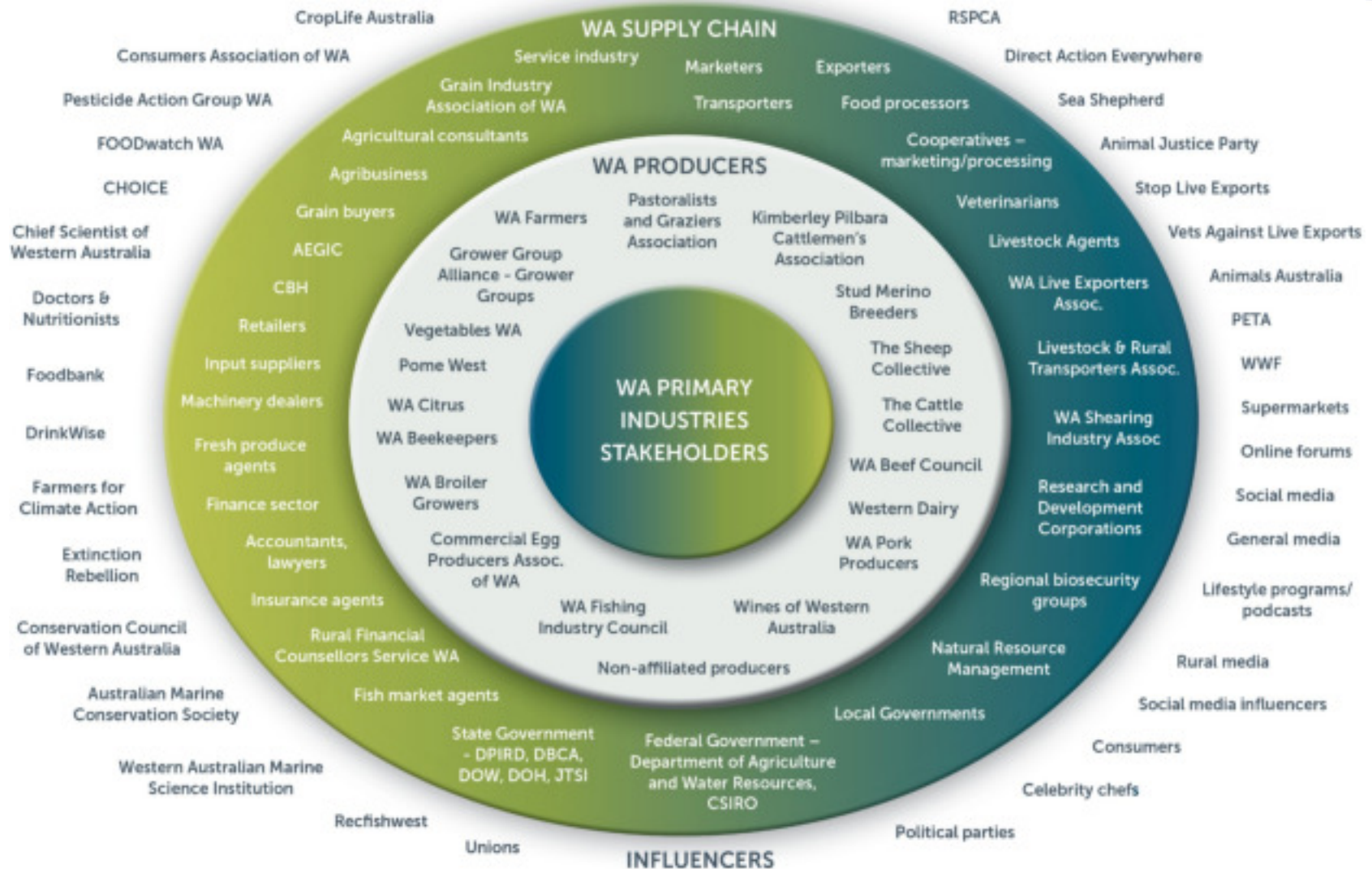
The Annual Edelman Trust Barometer online survey of 33,000 people conducted in 27 global markets measures trust by industry, with results specifically for the Food and Beverage Sector. The measure for farming and fishery of 70% provides a global benchmark WA can compare against in establishing its own state Trust benchmark.

Strong trust in farming and fishery, less so in manufacturers, agribusiness and fast food

Food and Beverage sector



Map of Stakeholders and Influencers of Primary Industries in Western Australia



Learnings from the desktop review:

- ➔ Work is building around trust in food; WA can **harness this investment and learn**.
- ➔ Challenges to the way food is produced are more frequent, have higher impact, and are faster moving; **disruption is the new normal**.
- ➔ **Industry needs to listen** to community concerns and demonstrate its commitment to shared values and continuous improvement.
- ➔ Socially-driven change issues have implications **across multiple primary industries**.
- ➔ **Identify common issues** and collaborate across sectors to share experience and intelligence.
- ➔ WA industries need to **articulate how local practices differ from what is portrayed** in the media.
- ➔ **WA industries can align with national projects** to ensure design and delivery is relevant.
- ➔ **Build industry capacity, leadership and engagement** to ensure trust initiatives have longevity and impact; this requires investment.
- ➔ Develop clear, **consistent messaging managed by WA primary industries** and support with strategic communication plans to help industries align to build community understanding and trust.

Community perceptions of WA primary industries

Consumer Perceptions



Trust

- 74% of Perth households trust WA farmers to produce their food.
- 76% of Perth households prefer to buy WA food when possible.
- 71% of consumers believe WA food has a good reputation internationally.



Sustainability

- 55% believe WA farmers do the right thing in caring for their land and animals, but people don't know much about the sustainability or animal practices of farmers and fishers.
- 29% of Perth consumers buy food based on the cheapest price, but 41% say they are prepared to pay more for food that meets their social and ethical expectations.



Industry perceptions

- 79% of the Perth metropolitan population surveyed believe food, farming and fishing are important for the WA economy.
- While only 11% of Perth householders feel connected and informed about the WA food, farming and fishing industry, there is interest with 44% of respondents indicating they would like to understand more about the WA industry.

Perceptions of food, farming and fishing in WA

People have pride and trust in WA farmers...



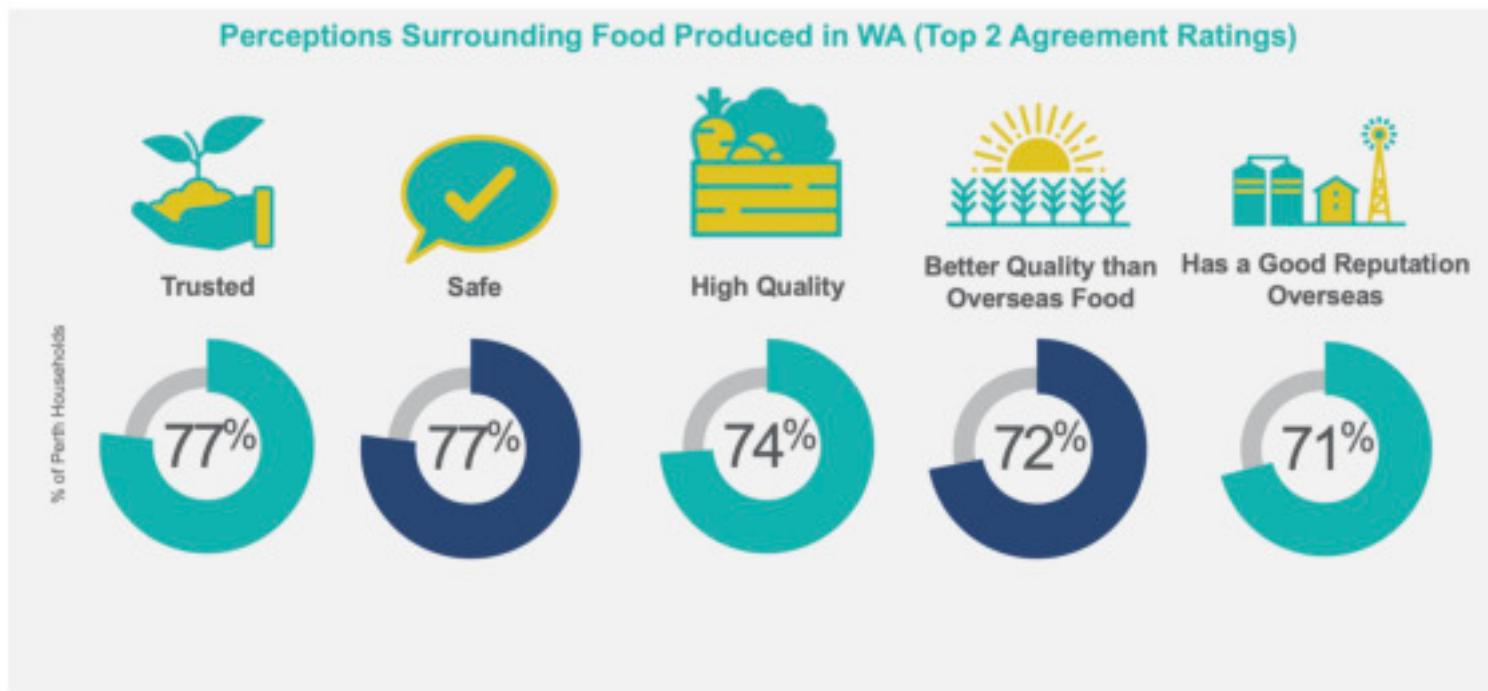
Base n=1,021

Q10. To what extent do you agree or disagree with the following statements?

NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)

Perceptions of food, farming and fishing in WA

...and the food they produce is trusted and safe.



Base: n=1,021

Q5. How would you rate the food produced by Western Australian farmers and fishers?

NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)

Perceptions of food, farming and fishing in WA

Environment and sustainability are opportunities.



Base n=1,021

Q10. To what extent do you agree or disagree with the following statements?

NOTE: Top 2 (NET 6 + 7 Strongly Agree), Bottom 2 (NET 1 Strongly Disagree + 2)

Perceptions of food, farming and fishing in WA



WA Primary Industries Trust and Values Qualitative Study

Industry and Stakeholder Perceptions

- **Over 100 interviews with Industry and Stakeholders**
- **Investigated challenges to the public's trust of food, farming and fishing**

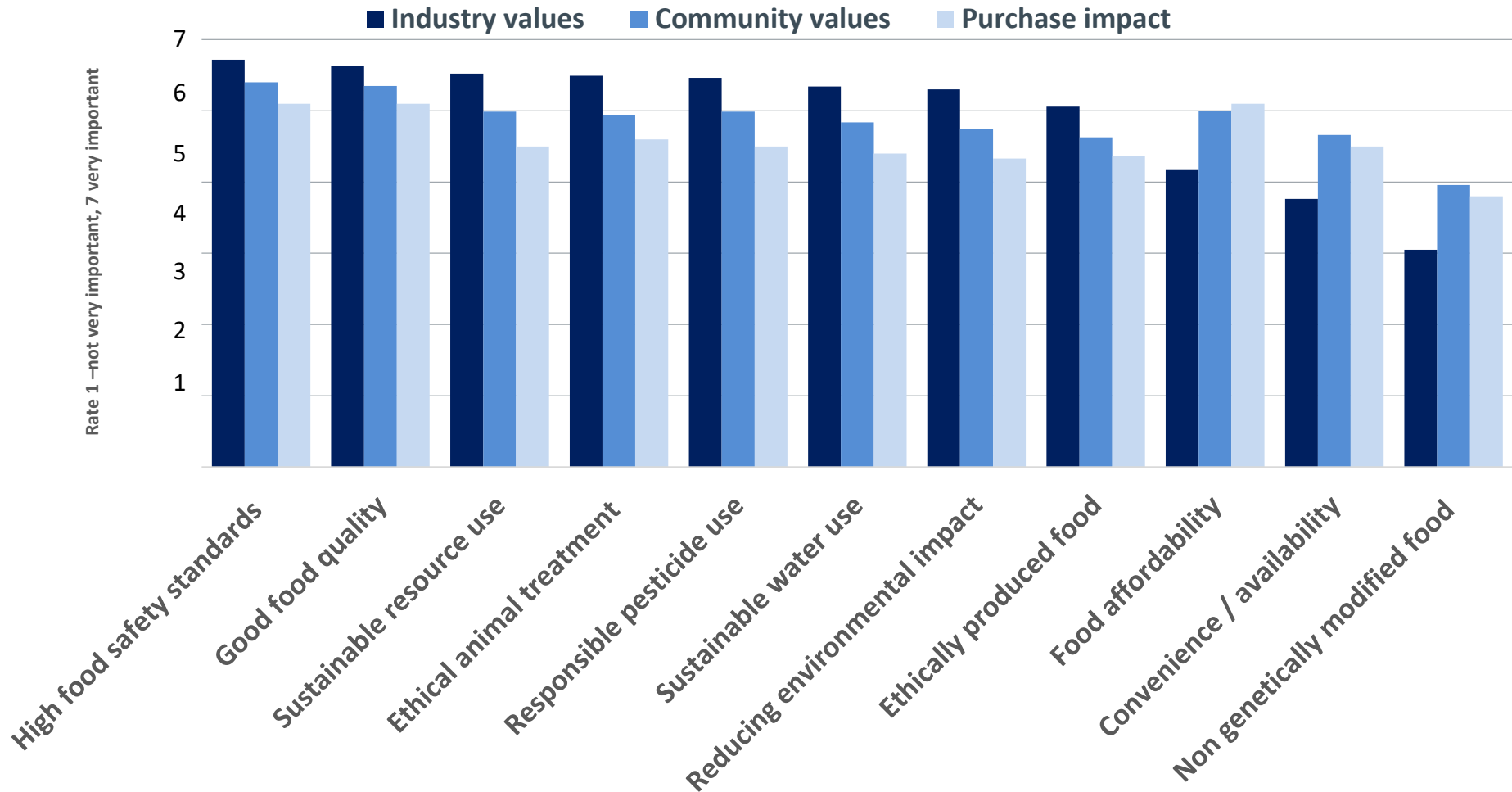
A lack of community understanding was the most frequently identified issue, but ethical animal treatment is overwhelmingly the issue more likely to impact in WA.
- **Specific impacts or consequences of trust issues for WA industry**

When asked to explain to a politician the impact or consequences of the key issues for WA, respondents simply asked government to demonstrate pride and confidence in WA primary industries, and not to react to the noise on social media.
- **Rating of industry individual values around food, farming and fishing**

Food Quality, Ethical Production, and Sustainability are highly valued by industry and are strongly aligned to the Perth Metro community's values.
- **Industry respondents are prepared to work collaboratively to address trust issues**

81% of respondents believe their industry is prepared to invest to manage trust for the WA industry's specific needs.

Comparing Industry and Community values on food, farming and fishing – Metrix and Agknowledge – September 2019



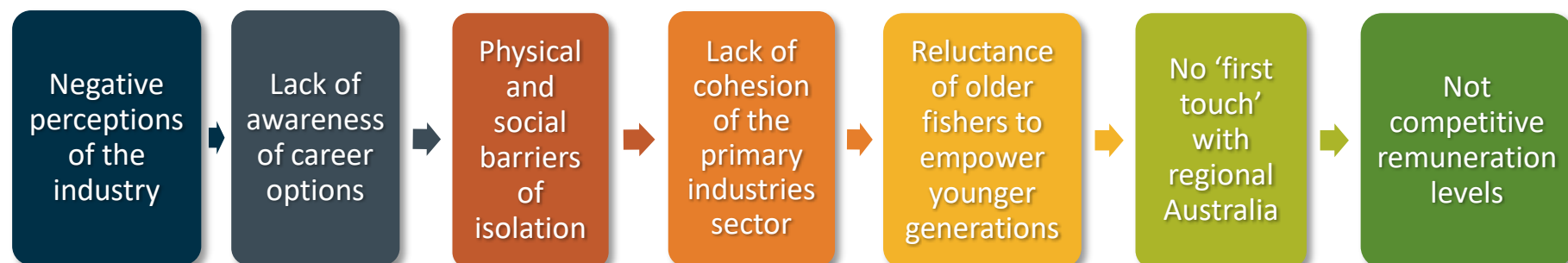
Informing and connecting WA students with their food

Metropolitan families and industry agree on the need to inform and connect with the next generation and the importance of investing in raising students' knowledge and understanding of WA food, farming and fishing.

*(Rate 1 – not very important,
7 - very important)*



Barriers to attracting young people to careers in the food, farming and fishing industries:



Consequences of industry not managing public perceptions



Consumers may boycott a practice or industry on little factual information or evidence.



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 increase regulation.



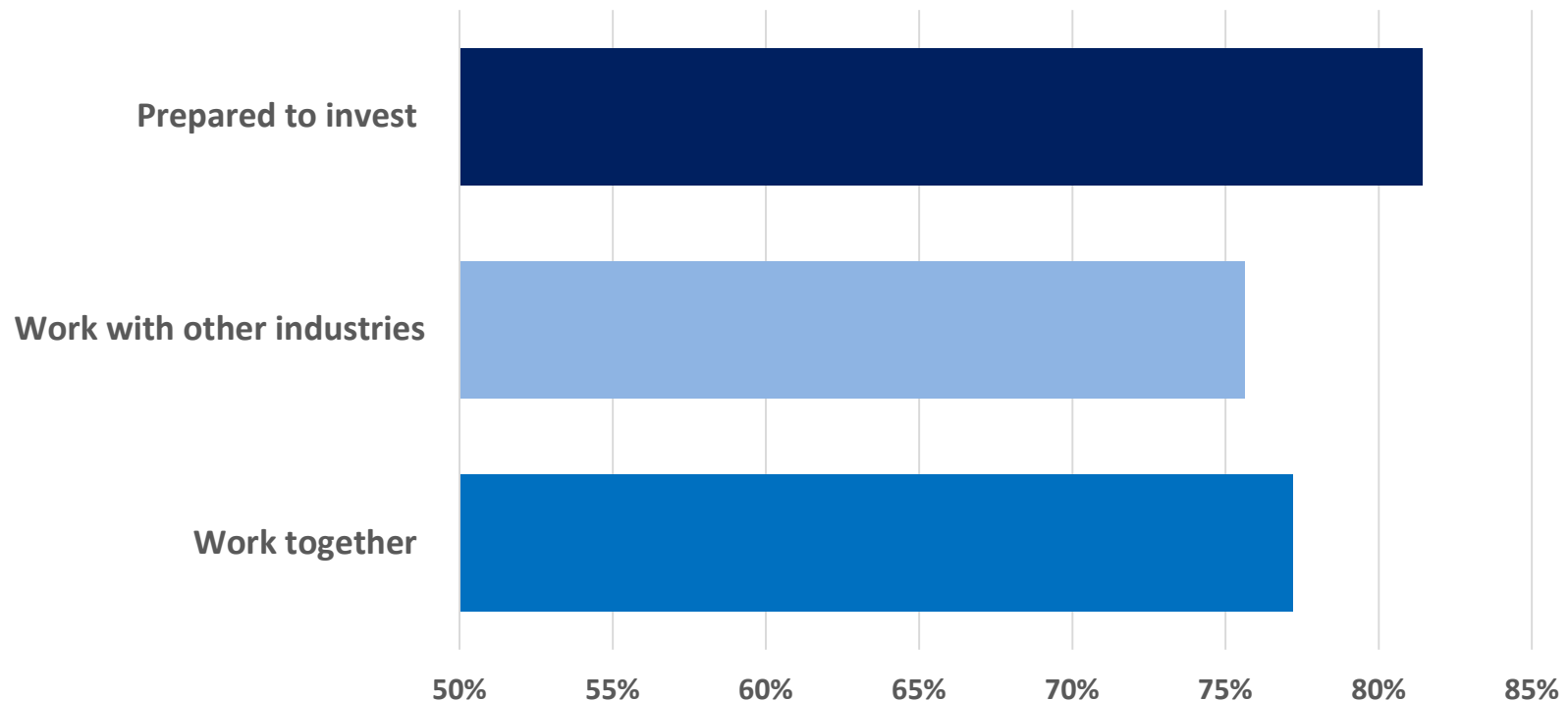
The consequences ultimately affect all West Australians if we lose our food security and reliable, affordable, quality food grown sustainably here in WA.



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 will take much longer to come to fruition.

WA industry's preparedness to invest to manage trust

- Prepared to invest to manage social licence for the WA industry's specific needs
- Prepared to work collaboratively with other industries in WA to address trust issues
- Prepared to work together in WA to address trust issues



Examples of managing public acceptance or trust:



colesgroup



Rabobank



RioTinto



THE HOUSE OF HONEY



Learnings from the qualitative interviews:

1. **There is huge value in open conversations** with stakeholders to listen to concerns.
2. **Stakeholders are keen to maintain a conversation** with industry.
3. **Ongoing 'listening' and engagement are essential** to build and maintain trust.
4. **Industry needs to listen to how it sounds** when defending an industry practice that is challenged by community expectations.
5. **WA industry must improve how it communicates** with **consistent and clear local messages** the public can relate to and understand.
6. **There is broad support for the sector** from influencers who identify local food production is critical to public health and the WA economy.
7. **Engage independent advocates** to present credible facts, without conflicts of interest.
8. **People want more transparency** about what we do and how we do it.
9. **People do not want PR videos or campaigns.** They just want the facts, from real people.



Industry key insights for the WA Trust Project

We do a great job at communicating within industry, but less so with the public.

- ✓ Work at industry level is developing, but there's gaps in working across industries.
- ✓ Collaborate on common issues and ways to share experiences for future 'events'.

Attract investment into social licence initiatives.

- ✓ Contribution to RDCs is seen as an already fair share of investment for 'trust' work.

Listen to understand how to better explain production standards and processes.

- ✓ Address the perceived unacceptable industry practices.
- ✓ Connect with students at an early age and maintain the connection in high school.

Identify where industry can efficiently and effectively influence public perceptions.

- ✓ Develop clear, concise, consistent messaging supported by strategic communication plans.
- ✓ Build capacity, leadership and engagement to ensure trust initiatives have longevity and impact.

Understanding shared values is the foundation of building trust.


- ✓ Good quality, safe, ethical and affordable food are shared values with the public.
- ✓ Many positive examples exist of industries managing their public acceptance.

Determine how to sustain the effort, and share knowledge and resources.


Masterclass workshop – December 2019



Demonstrated there is industry sector willingness to engage and collaborate to build and maintain trust in primary industries.



Developed a better understanding of the level of community trust in WA primary industries and identified areas to align on trust building initiatives.



Demonstrated the value of creating space for industry sectors to come together and have conversations around broader issues that challenge trust in the food sectors.

Ralph Addis - DPIRD Director General

"We've had a whole range of challenges in recent years in primary industries and there is a raft of threats on our radar so we need to be thinking 5-10 years ahead. We need to be proactive and prepared with leadership that can stand up quickly when things go awry.

Our markets will demand things that have not been expected in the past; the more prepared we are, the more chance we can respond. We need to think of this as Team WA Primary Industries.

We have provided anchor funding, it is in our top five priorities, so it will continue to be important for the Department, but industry needs to step in to make it a real thing.

We need to get proactive in this space and I would expect Food Alliance WA to identify how to bring it to life."

Why WA primary industries need to invest in managing trust:

Ensure WA farming and fishing stories are heard

- ➔ Support sectors to develop consistent, trustworthy stories and advocates to calmly and rationally speak up for WA food, farming and fishing amid all the 'noise'.

Explain WA's export focus and reliance on global markets

- ➔ Export is the priority with our limited food processing capacity and distance from alternative domestic markets.

Demonstrate the impacts of major policy change

- ➔ Call out the unintended consequences and WA impacts of policy shifts.
- ➔ Address political ideologies that may be at odds with economic and commercial realities in WA industries.

Promote WA's modern farming and fishing sectors

- ➔ Demonstrate our capacity to combine science, technology and innovation to adopt, adapt and improve sustainability.

Balance national media and advertising content

- ➔ Counter national content that promotes out-dated, negative images of farming as an 'industry in decline'.

Distinguish why we do things differently

- ➔ Explain WA's modern, complex, large scale, efficient, zero-tillage, free range, rain-fed sustainable systems to balance public perceptions built on images of more intensive northern hemisphere systems.

WA Primary Industries Trust Strategic Plan

Agknowledge Draft

Vision: Industry has the capacity and aspiration to enhance the social licence and trust in Western Australian primary industries and food.

Objectives:

- ➔ Encourage industry innovation to better manage its profile and reputation.
- ➔ Enable improved public understanding of primary industry's value.
- ➔ Stimulate regional employment and attract new industry participants.
- ➔ Agri+culture®: make the connections, promote regional provenance and seasonality, and build pride and confidence in the quality of WA produce.

Strategies

Build industry capacity to build the social licence and trust in WA primary industries.

Inform and influence public perception of the WA primary industries sector.

Attract new industry entrants through education, training, employment and investment.

Align government and industry initiatives to build the trust and profile of the sector.

Establish governance and a legacy to sustain the effort and secure industry ownership.

Outcomes

- ✓ Greater understanding and trust in WA primary industries, tracked with attitudinal surveys of urban, regional, education and industry sectors.
- ✓ Regional employment growth through attraction and retention of employees.
- ✓ Increase in agricultural graduates, school programs embedded in curriculum.
- ✓ Consumers recognise and value WA food, and are increasing demand by making conscious decisions to buy WA produce.



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All reports are available at:

<https://wafarmers.org.au/about/food-alliance-trust-in-ag/>

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