

An aerial photograph of a herd of cows in a lush green field. The cows are scattered across the frame, with a larger group in the center and several others dispersed around it. The field is vibrant green with some small white and yellow spots, possibly flowers or debris. The cows have various coat colors, including brown, white, and brown-and-white patterns.

Australia's Shifting Mindset on Farm Animal Welfare

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ABOUT FUTUREYE

Futureye is a consultancy which facilitates real solutions to real dilemmas around the world. Our methodology for understanding dilemmas and building real solutions is unique and highly effective. We offer a set of services which enable our clients to earn and maintain a social licence to operate. To do this we: track the issues that might undermine or enhance the tacit approval for an industry; assess the changing values of society; develop strategy, plans and deliver sustainable outcomes through engagement.

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The Department of Agriculture and Water Resources is faced with a number of risks due to changing societal expectations about farm animal welfare and the adequacy of regulation.

Our relationship with farm animals is complex. On the one hand, people are instinctively empathetic to the plight of animals. On the other, we are conscious that they are a significant source of food. This tension has evolved for millennia and is densely layered with social and economic complexity.

Futureye's findings clearly show that the Australian public's view on how farm animals should be treated has advanced to the point where they expect to see more effective regulation. In Australia today, 95% of people view farm animal welfare to be a concern and 91% want at least some reform to address this. This perceived gap between expectations and regulation spells increasing risk for the Australian federal government, and more specifically the Department of Agriculture and Water Resources (the Department) which currently has very limited powers over farm animal welfare.

The major driver of this shift is an increased focus on animals' level of sentience and related capabilities. Research indicates a fundamental community belief that animals are entitled to the protection of relevant rights and freedoms, closely aligning with activist sentiment. The public has a clear expectation for effective regulation to uphold these freedoms and expect highly transparent practices, regulation and enforcement.

Concerns around issues of animal welfare are spread relatively evenly across states and territories, and between capital cities, regional towns and rural areas. The level of concern is mainly determined by awareness and knowledge of specific animals and agricultural practices. Issues that receive more media coverage, such as live export and battery cage chickens, attract higher levels of concern.

Both the quantitative and qualitative research show that potential outrage is highest for practices that are seen as unnecessary; are perceived not to have any benefit to the animal, farmer or consumer; or are depicted graphically in the media. The research also indicates that there is distrust of the industry and government when it comes to the welfare of farm animals. This distrust seems to be fuelled by the perception that there is a lack of transparency and that certain information may be kept hidden intentionally, or deliberately obscured.

“ Animals have needs, choosing not to meet these needs is cruel ”
General public focus group participant, Melbourne

“ I don't trust the industry, or the way things are portrayed. Certain things are kept hidden. ”
General public focus group participant, Brisbane

A significant portion of the public, in particular those who feel they are generally less informed about the issue, believe the available information is conflicting and insufficient to be able to form a view on current farm animal welfare regulation.

The Department faces three major social licence threats related to farm animal welfare. First is the potential for issues in the media to draw uninformed sections of the population into the debate, which may result in reactive calls for extreme regulation, as seen with the live export issue. Second is a demand for more effective regulation by a growing group of highly informed stakeholders that is aligning with activist views. Third, and most significant, is a strong belief that the federal government is the key government authority responsible for regulating farm animal welfare. This is the view across both less-informed and highly informed groups, despite the federal government's lack of constitutional power to create reform. This has the potential to result in outrage, particularly if the community sees the government as not responding to concerns and expectations.

In summary, the Department of Agriculture and Water Resources plays a critical role in balancing policies that facilitate and promote the agricultural sector with setting some of the regulatory standards for the sector's performance. The potential for community outrage about animal welfare puts that balance at risk and creates regulatory expectations the Department may be unable to meet. Futureye recommends the Department adopt outrage mitigation strategies to address concerns about farm animal welfare and its role in regulating this issue.

“ There is no willingness from the government to act, they are backing the farmer rather than the welfare of the animal. ”
Attentive focus group participant, Perth



Quantitative research found that the public is most concerned about the current welfare standards of chickens farmed for egg production

Research Process

The Department of Agriculture and Water Resources requested Futureye to identify expectations of farm animal welfare to understand whether the current regulations are perceived to be sufficient. To answer these questions Futureye completed the following components:



Desktop Review

Futureye completed preliminary desktop research to understand the current context and identify activist claims and statements made about farm animal welfare.



Futureye Social Maturation Curve

The Futureye curve on social maturation assesses an issue's maturity from early theorisation through to normalisation to understand both the current level of maturity, as well as identifying the drivers of change that need to be understood and addressed to shift opinion (see Appendix A, p. 19 for further information).

For this research Futureye developed a social maturation curve around the question: "How have the community impressions of the welfare of farm animals changed over time?"



Quantitative Research – National Survey

Quantitative research is used to understand whether the public are buying into the activist arguments. Through the research we determine the breakdown of the issues and how aligned the segments are to the views of the highly involved. We also look at the frames of reference the public have when communicating with them. Based on how mature the issue is, the priority and type of approach required can be determined.

Futureye conducted a nationally representative survey which was completed by a total of 1,521 respondents. (see Appendix C, p. 28 for more information).



Qualitative Research – Focus Groups

Focus groups are aimed at identifying how the views of highly involved audiences have spread to wider audience groups and identifying the turning points which led them to change their views. Futureye facilitated nine focus groups with a total of 69 participants held in Melbourne, Perth and Brisbane. A total of three focus groups were held in each city and were segmented according to attentive, browser and general public audiences (see Appendix E, p. 97 for more information on Futureye's methodology).

Highly involved are the audience or key people who can influence perceptions towards an issue and jeopardise a social licence to operate. Highly involved stakeholders have power and are highly passionate about a topic.

Attentive stakeholders are passionate about a topic, but to a lesser degree than the highly involved. Indicators of attentives include active in conversations and publications and the ability to reference the highly involved; views reflective of highly involved's views.

Browsers are those who are watching the issue develop through news or online media however haven't made up their mind about the issue or are neutral towards it. The critical aspect to browsers is that they are watching how the attentive and highly involved are being treated and often will decide to get further involved if they perceive this treatment as poor or not sufficiently addressing their concerns.

1 Societal expectations on farm animal welfare are evolving

1.1 There is a gap between societal expectations and the regulatory reality

The primary finding, consistent across both focus group and quantitative analyses is that societal expectations are not static. In fact, they have changed significantly in relation to the issue of animal welfare in agriculture and are continually evolving.

The social maturation curve analysis allows us to understand the phase of evolution of an issue in society. It allows us to anticipate the future development of an issue and to determine appropriate management strategies. According to the analysis the issue of farm animal welfare is in the “challenge” phase. This phase is where regulatory systems and constitutive relationships come under public scrutiny. The issue becomes polarised in the public debate and champions representing different views on the issue emerge (see Appendix A, p. 20 for the curve and detail on the methodology). This reflects a gap between what people are expecting of the regulator and the perceived regulatory reality.

While most factors contributing to this change in expectation are grounded in specific animal welfare concerns (discussed below), environmental and health impacts have also shaped the public’s view about farming in Australia and could indirectly influence concern about animal welfare (Appendix C, p. 33). By far the best indicator explaining evolving societal expectations is the public’s view on the status of animals.

1.2 Animals are seen as sentient beings that have capabilities, rights, and freedoms

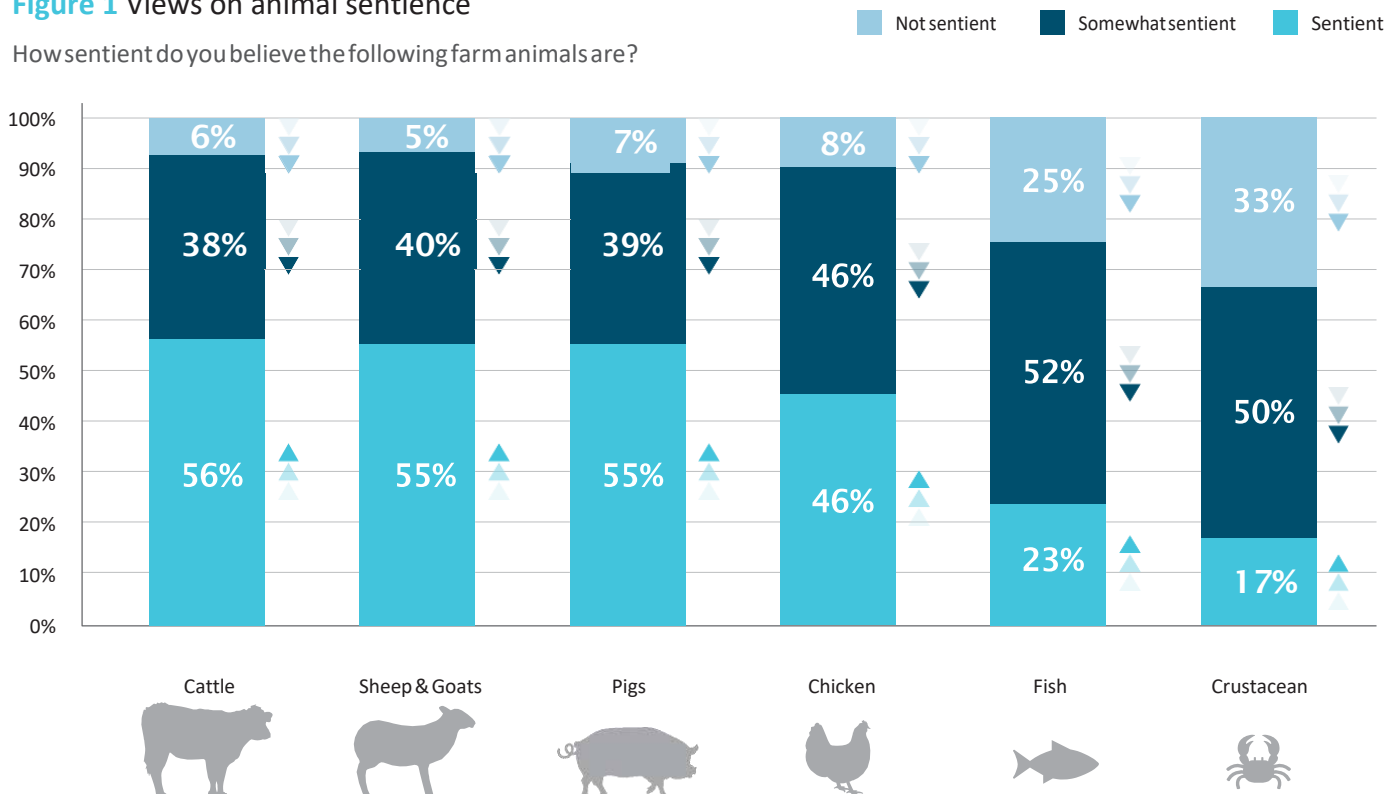
Perhaps the most striking characteristic of this change in expectations is in relation to the issue of animal sentience. This was consistent across data sets with some variation noted in the linking of sentience with intelligence (with fish and crustaceans considered least sentient). Specifically, quantitative research revealed 55% to 56% of respondents surveyed believed cattle, sheep, goats and pigs were sentient as shown in Figure 1. Chickens were viewed as less sentient (46%) while fish and crustaceans attracted the lowest percentage rating for sentience across both quantitative (23%, 17%) and qualitative research findings (Appendix C, p. 35, D, p. 85). Focus group results reveal strong agreement across attentive, browser and general public groups that animals are sentient beings. (Appendix D, p. 85).

Consistent with this belief in sentience is the recognition that animals possess certain capabilities. Quantitative data revealed that 57% believed animals had awareness of bodily sensations such as pain, heat, cold, hunger; 56% believed they possessed the capacity to experience stress; 47% felt animals had awareness of their surroundings; and 45% felt animals had the capacity to experience joy and pleasure (Appendix C, p. 37). Fewer people believe animals have the capacity to express desires and wants; seek positive experiences and possess complex social lives (Appendix C, p. 37).

If it is accepted that animals are sentient and possess certain capabilities, it is logical to believe that these capabilities should be safeguarded through the adoption of rights and freedoms. This sentiment is expressed in the quantitative results, revealing high levels of agreement on rights and freedoms for animals, particularly relating to freedom from pain and cruelty. Specifically, this included the right not to be subjected to unnecessary pain and suffering; freedom from thirst and hunger; pain, injury and disease; fear and distress and from discomfort by providing appropriate environment, shelter and comfortable resting area (Appendix C, p. 39).

Figure 1 Views on animal sentience

How sentient do you believe the following farm animals are?



1 Societal expectations on farm animal welfare are evolving

1.3 There is a high level of alignment with activists' views on the treatment of animals

People who believed animals have sentience and capabilities were likely to have high alignment with activist statements relating to animal rights and freedoms. Issues attracting lower levels of alignment include activists' arguments that painful husbandry procedures are indefensible; animals should not be solely housed indoors; intensive farming is indefensible; calls for banning of the live export trade and claims farm animals being bred and killed for human consumption is unfair (Appendix C, p. 77).

High levels of alignment pose a risk to the Department due to the "vortex effect". In a vortex situation increased outrage leads to highly involved stakeholders gaining the attention of neutral and undecided audiences, including attentives and browsers. When they listen to the views of the highly involved, and their concerns are not addressed, attentives and browsers begin to agree with the perspectives of the highly involved and support their activities, creating a "vortex effect" that continues to attract more attention.

1.4 Evolving views on how animals should be treated is impacting the public's perception on the effectiveness and transparency of regulation

Increased expectations on the sentience, capabilities and rights of animals are impacting expectations on the perceived effectiveness of regulation and levels of transparency in relation to animal welfare.

I don't think the current standards are good enough, they need to be improved and enforced.

Attentive focus group participant, Brisbane

There is an expectation that regulation of animal welfare issues needs to be effective, consistent and proactive. The quantitative analysis reveals a high percentage of respondents who see the need for "significant reform" (40%); with 35% requiring "slight reform" and 16% believing some kind of reform was required (but were uncertain as to its precise nature). Only 10% of respondents believed current regulation was adequate (Figure 2). When respondents were informed about the reason for certain practices such as the maceration of male chicks and slaughtering of bobby calves, farm animal welfare standards were perceived as inadequate (Appendix D, p. 87). While overall there is greater agreement than disagreement on positive statements in relation to the role of the federal government, there are also high levels of ambivalence. There is a direct correlation between how serious an issue is perceived to be and the level of disagreement on positive statements relating to the federal government. For example, the strongest levels of disagreement were in response to the statements "the Australian federal government is effective in enforcing animal welfare standards," "the actions and campaigns of animal welfare activists are too extreme"; and "the Australian federal government takes the welfare of all animals very seriously" (Appendix D, p. 46).

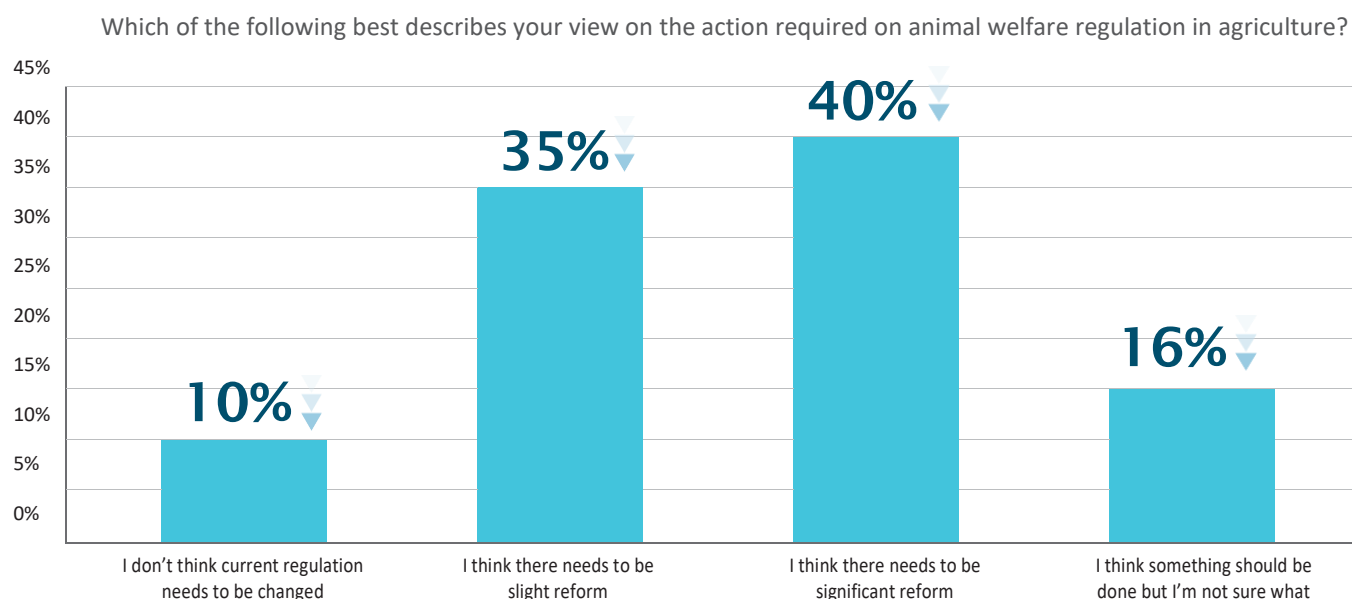
A significant proportion of the public being ambivalent to positive statements on the federal government's efforts creates a risk due to the "vortex effect". Similar to the alignment with activist statements there is potential for a large audience segmentation to be swayed towards more critical views of the federal government.

Focus group findings suggest that the public expects the government to be more responsive as one of the views expressed was that "government is reactive to investigative media but is not proactively seeking to find solutions". Another respondent drew a comparison to the education system, "teachers are being held accountable for higher levels of student achievement, the federal government should ensure farmers have the same level of responsibility over their animals to ensure good animal welfare standards" (Appendix D, p. 94).

There is lack of transparency. There is a lot going on behind closed doors and you end up relying on the media.

General public focus group participant, Perth

Figure 2 Views on action required



1 Societal expectations on farm animal welfare are evolving

The respondents were conscious that they are not well informed about how animal welfare is managed. Focus groups revealed that generally people, other than the attentives and some browsers, are unaware of standard agricultural practices or husbandry procedures (Appendix D, p. 87). This correlates with quantitative findings where 42% of respondents felt there is too much and often conflicting information about animal welfare, while 40% of respondents felt they did not have enough information to understand what happens in the agricultural industry (Appendix C, p. 53). As a consequence, the community wants greater transparency about animal welfare practices and more consistent information.

Calls for transparency include better information for consumers with “better channels for consumer information so that the consumer can make an informed choice”. Industry transparency was also raised with one participant stating “we don’t know what happens on industrial farms, we don’t know enough about industrial farms to determine whether the standards are good” (Appendix D, p. 90). Quantitative data found 29% of respondents did not trust the information available to them on animal welfare, while 31% of respondents felt that the agricultural industry is not transparent about its practices (Appendix C, p. 53).

A demand for regulatory transparency was also noted, “I feel that there’s a lot we don’t know. It’s not actively put out there and we don’t know what is happening”. Where there is an apparent lack of transparency, perceived conflicts are more likely to arise – “government should make sure there isn’t any conflict of interest. There should be no political donations from the industry that will get in the way of ensuring good animal welfare standards” (Appendix D, p. 94). There also exists high alignment with the activist statements – “the government should do more to ensure the transparency of agricultural practices” and “there should be a federal body to oversee the regulation and governance of animal welfare issues” (Appendix C, p. 42).

1.5 Federal government is seen as highly responsible for ensuring farm animal welfare

Increased expectations on the sentience, capabilities and rights of animals are impacting expectations on the perceived effectiveness of regulation and levels of transparency in relation to animal welfare.

“The government should be making sure the farmers are doing their job and responsibility isn’t being pushed down to the consumer. Regulation needs to be better.”

Attentive focus group participant, Melbourne

Quantitative findings revealed 31% did not feel the federal government was ensuring animal welfare practices were upheld on farms (Appendix C, p. 53). When specifically asking respondents about responsibility, quantitative findings revealed industry was seen as most responsible, followed very closely by federal government and farmers with equal levels of responsibility. Lower levels of responsibility were attributed to NGOs (i.e. RSPCA) and consumers as shown in Figure 3. Focus group findings suggest that the public also see retailers as responsible as they are perceived to be putting financial pressure on farmers making it difficult for them to implement good animal welfare standards (Appendix D, p. 94). In terms of consumer responsibility, 65% of respondents stated they were willing to pay more to ensure animal welfare standards as shown in Figure 4. Willingness to pay more is directly correlated with the level of education attained with those attaining higher education levels being more willing to pay. In addition, those in the public earning \$75k-\$90k per annum were most willing to pay more. There is no apparent correlation with income although focus group results suggest that lower socio-economic groups do not feel they have the financial luxury to make a choice (Appendix C, p. 59, D, p. 94).

Focus group findings across all groups suggest that federal government, when compared to consumers and industry, is seen as most responsible for ensuring effective animal welfare standards (Appendix D, p. 94). As part of this responsibility the public expects the federal government to develop and enforce minimum standards. One focus group participant stated “I want to see the government being more proactive, fixing the problem before it gets any worse so that the status quo does not remain” (Appendix D, p. 95). The federal government was seen to have a higher level of responsibility than state and territory counterparts in order to meet the expectation of consistent standards across Australia and to ensure that no state has a competitive advantage over another. Additionally, industry self-regulation was not considered possible and multiple references were specifically made to the current crisis in the financial services sector, underpinning the expectation that the government must assume regulatory responsibility. The majority of focus group participants specifically mentioned seeing the Department of Agriculture as responsible and a few referred to the Department of Health (Appendix D, p. 94).

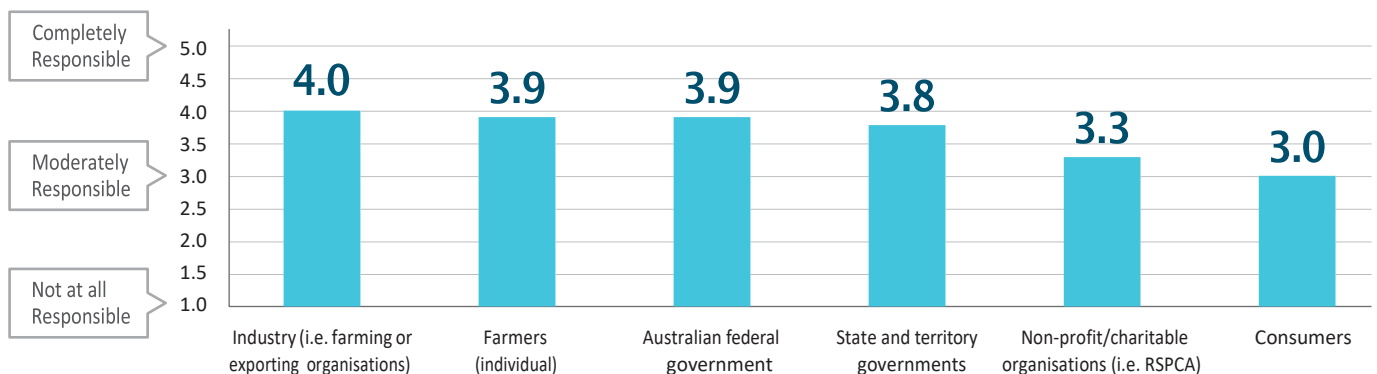
“By the time that you get to the supermarket it should be a given that the meat has come from an animal that has been treated humanely and slaughtered ethically.”

Browser focus group participant, Melbourne

Figure 3 Level of responsibility

How responsible do you think the following should be for farm animal welfare?

Level of responsibility (1-5)



1 Societal expectations on farm animal welfare are evolving

1.6 The public is demanding stricter regulation and effective solutions

There is a clear expectation that there is a need for a reform of the current regulatory system. Suggestions in the focus groups for government response included a minimum standard set by government (plastic bags regulation was mentioned); incentivising farmers in relation to good animal welfare practices; better education about agricultural practices in terms of awareness-raising and standard setting on use of product labels (organic; free range etc.). As one respondent stated “if animal welfare was regulated properly by the industry and the government, the consumer wouldn’t have to make a choice, they would be assured that the animal products they bought had good animal welfare standards” (Appendix D, p. 95).

Focus group findings suggest that a large portion of the public believe and expect that animal products labelled as cage-free, free-range, and organic have better animal welfare standards (Appendix D, p. 91). Focus group findings however also show that there is uncertainty amongst the public on whether these labels can be trusted. As a result, one of the solutions discussed by focus group participants was the development of a trusted certification process and label that can help consumers differentiate animal products that have good animal welfare standards from bad ones (Appendix D, p. 91).

“ I would only be willing to pay more for a product if I can be certain that it is really ensuring better animal welfare standards and it’s not just advertising and marketing. ”

General public focus group participant, Perth

Quantitative data reveals 65% of respondents stated they would be willing to pay to ensure better conditions and welfare for farmed animals. However, this is directly correlated with the level of education attained and focus group findings suggested that this might also depend on socio-economic situation (Appendix C, p. 59, D, p.94). Further, focus groups suggested that the public is willing to pay more but only if they feel that they can trust the products really ensure better animal welfare standards and if the industry is transparent about its practices. While improving the welfare of farm animals was the main driver to pay more, the perception that these products would be of higher quality, better tasting and healthier also contributed to a willingness to pay more (Appendix D, p. 94).

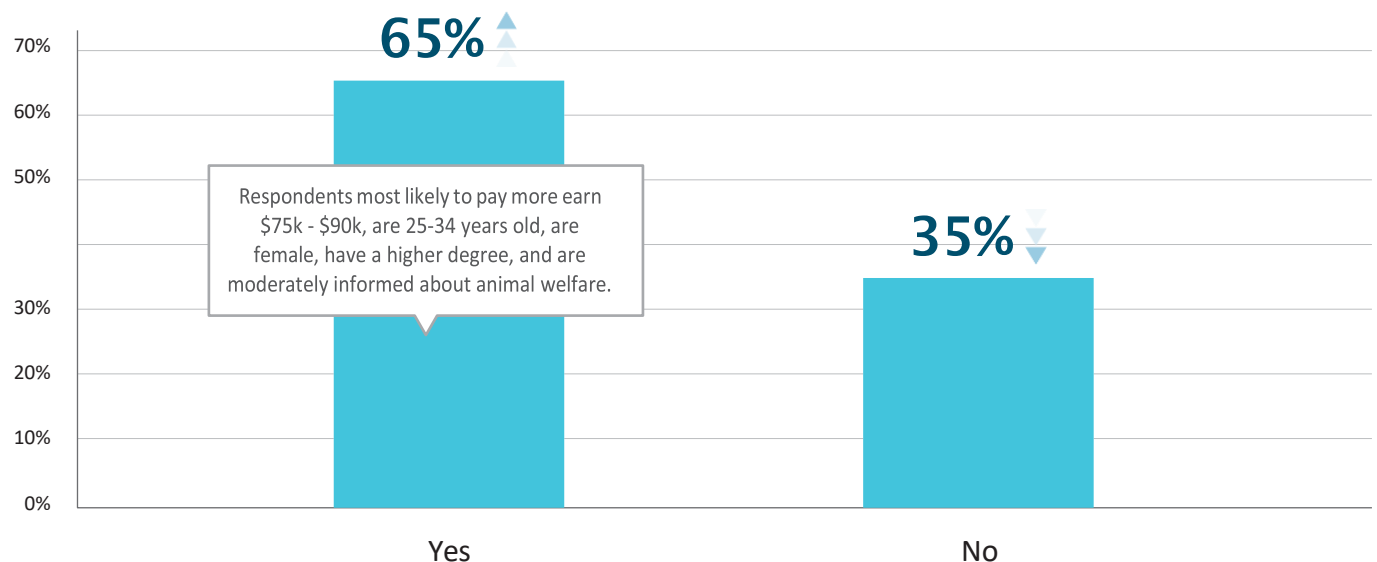
This increased expectation of stronger regulation by government finds high alignment with activist statements on regulatory reform (i.e. “government lacks enforcement measures to ensure animal welfare in the agricultural industry”; “current government regulations are failing to ensure animal welfare in the agriculture industry”) (Appendix C, p. 79).



Quantitative and qualitative research found that the public views crustaceans as being the least sentient animal

Figure 4 Willingness to pay more

Would you be willing to pay to ensure better conditions and welfare for farmed animals?



2 There is a high level of concern about the treatment of farm animals and current regulation

2.1 Relating issues such as sustainability, health and foreign ownership are influencing views about farming in Australia

Both quantitative and qualitative research show that, in addition to animal welfare, there are a range of issues that influence the public's opinion about the farming of animals in Australia. While these issues might not directly relate to the treatment of animals, they shape the broader context and have the potential to act as a trigger or a driver of increased concern about farm animal welfare.

Aside from animal welfare issues, the biggest factor contributing to concern about farming in Australia is the low income of farmers and farm workers (Appendix C, p. 33). Concern about the financial stress that farmers are under was a reoccurring theme during focus groups and in particular was top of mind for the focus groups in Perth (Appendix D, p. 85). Foreign ownership of farms in Australia is another top-ranking factor, and for the oldest respondents is seen as the main reason for concern about farming animals in Australia. Focus group findings suggest that the public may associate foreign ownership with lower welfare standards. In addition, there is a perception that foreign ownership will lead to increased financial pressure on farmers (Appendix D, p. 85). In contrast, the youngest respondents are most focussed on the health implications of eating meat and animal products; during focus groups health was frequently mentioned as a reason to decrease meat consumption. Additional factors influencing the public's perception on the farming of animals and changing purchasing and consumption behaviour are the environmental impacts related to the intensive farming of animals (Appendix D, p. 83).

“ I feel that foreign owned farms might have different standards than Australian ones. ”
Attentive focus group participant, Perth

2.2 The majority of the public is concerned about how farm animals are treated

The quantitative research shows that an overwhelming majority (95%) of the public is concerned about the treatment of farm animals and considers farm animal welfare in Australia to be an issue to some degree as is shown in Figure 5. More than a quarter of the respondents believe it is a serious issue, and 44% and 24% categorise it as a moderate and minor issue respectively (Appendix C, p. 62).

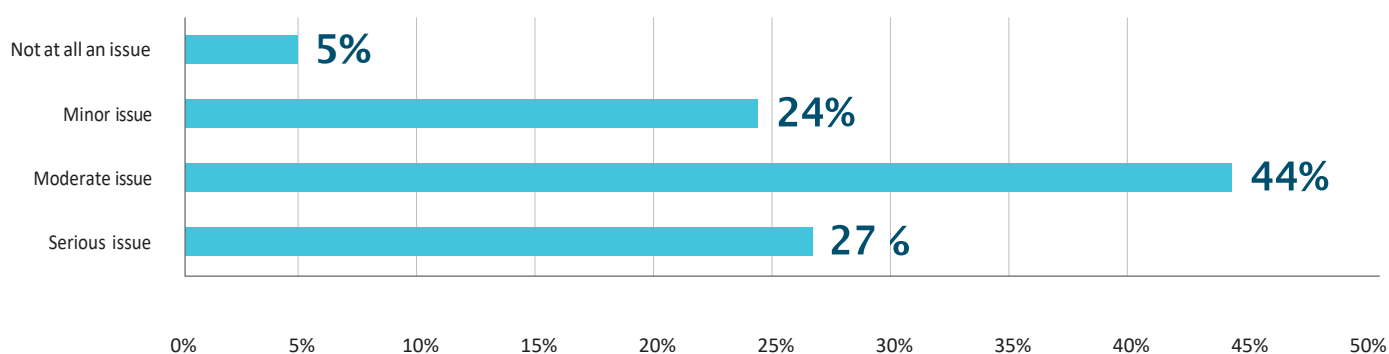
The percentage of respondents that are concerned about animal welfare is similar across states and territories and reflects the national average of 95%. While there is a relatively even spread of respondents that consider farm animal welfare to be a serious issue (approximately 30%) there are slight differences in views between states and territories on whether it is a minor or moderate issue. Overall, South Australia with 36%, has the largest percentage of respondents who believe farm animal welfare is a serious issue. Queensland, with 7%, has the largest percentage of respondents who believe it is not an issue at all. It must however be noted that while there are slight differences, they are not statistically significant (Appendix C, p. 65). Similarly, there is no significant difference in views between respondents from capital cities, regional towns or rural areas. As expected, the respondents who do not consume animal products are also more likely to indicate animal welfare is an issue. Those respondents who do not believe it is an issue on average are 51 years old and there is a clear trend of younger age groups having increased concern about farm animal welfare. Females tend to be more concerned than males (Appendix C, p. 62).

The quantitative results show that having knowledge about an issue is an influential driver of concern. Respondents with knowledge about animal welfare specifically are much more likely to view it as a serious issue than those who are informed about agriculture in general or those who consider themselves less informed on the topic (Appendix C, p. 63). These results were supported by the qualitative research where it was found that the attentives were more aware of the issue and expressed higher levels of concern with current practices (Appendix D, p. 87).

“ Working with animals has changed my perception of them. I see them as sentient, caring for their young and having a will to live. I now connect meat in the supermarket with the actual animal. I was naïve before. ”
General public focus group participant, Brisbane

Figure 5 Concern about farm animal welfare

To what extent do you consider farm animal welfare to be an issue?



2 There is a high level of concern about the treatment of farm animals and current regulation

2.3 Concern tends to be higher for animals and issues that have received media coverage

As explained in the previous section there is a high level of agreement that animals are sentient and have the right to have a humane and pain free life and death, even if bred for consumption. While the focus group findings indicate that the public does distinguish between farm and companion animals, there is a view that this distinction is based on the way we as humans treat these animals rather than an inherent difference between the animals themselves. Furthermore, there is a perception that regulation around companion animals is stricter and that for this reason companion animals would never be treated the same way farm animals currently are. As a result, concern about the treatment of farm animals seems to be higher than that of domestic animals (Appendix D, p. 85).

Quantitative research indicates that the public has the highest disagreement with the statement that chickens for egg production have good animal welfare standards, followed by chickens for meat production as shown in Figure 6. In contrast, the public is least concerned about fish and crustaceans. Both of these views are supported by focus group findings. Battery cages and the welfare of chickens were issues raised frequently across focus groups and can be explained by the media coverage on the topic which has increased the public's awareness. The lower level of concern for fish and crustaceans can be linked to sentience – both quantitative and qualitative results indicate that they are seen as the least sentient animals (Appendix C, p. 35, D, p. 85). Most of the concerns raised about fish and crustaceans during focus groups focused on the environmental and health impacts of overfishing and fish farms rather than animal welfare aspects (Appendix D, p. 85).

“Chickens are an obvious concern because we have seen the issue in the media.”
 Browser focus group participant, Perth

“I would eat fish and prawns as I don't see them as overly aware, but I wouldn't eat an octopus because they are very intelligent.”
 Browser focus group participant, Melbourne

2.4 The public is most concerned about practices that are depicted graphically in the media, are viewed as unnecessary and that do not seem to provide benefit to the animal

When analysing the drivers of concern of farming in Australia in general, quantitative research results indicate that poor animal welfare standards of animals on export ships and poor animal welfare for Australian animals abroad rank as the highest drivers (Appendix C, p. 33). Live export is also the issue raised most frequently without being prompted, and in particular was top of mind for the groups in Perth. The public seems to speak about concern of live export in the general sense indicating that it is not limited to concern about sheep (Appendix D, p. 87).









However, when comparing quantitative research findings on various agricultural practices, live export is ranked fifth, just after the use of hormones and antibiotics for growth promotion (Appendix C, p. 72). These results indicate that the degree of concern is spread relatively evenly across the different practices. The withholding of food and water from animals for long periods of time during transportation has the highest level of concern, followed by performing painful procedures on animals without pain relief. The agricultural practices that rank the lowest in level of concern are branding, mulesing and the gassing of animals to make them unconscious before slaughter (Appendix C, p. 72). This ranking in combination with findings from the focus groups suggests that the public is more likely to be understanding and therefore less concerned about practices that have a perceived benefit to either the animal or the farmer such as mulesing or dehorning. However, when informing the focus group participants of practices such as the separation and slaughter of bobby calves or the maceration of male chicks, participants responded with a high level of outrage about the practice. These findings suggest that overall the public is more likely to be concerned and feel outraged about agricultural practices that are depicted graphically in the media, are viewed as unnecessary, or that do not seem to provide any benefit to the animal.

“I consider myself a republican and free market capitalist type but watching the footage of the live export ships changed my mind.”
 Browser focus group participant, Melbourne

“Overcrowding is the biggest issue, it causes stress for the animals.”
 Attentive focus group participant, Melbourne

Figure 6 Concern about specific animals

Do you agree that the welfare of the following farm animals is generally good?

Animal	Percentage of disagreement
 Chickens for egg production	35%
 Chicken for meat	31%
 Pigs	23%
 Beef cattle	18%
 Sheep & goats	18%
 Dairy cows	17%
 Fish	12%
 Crustaceans	10%

Additional agricultural practices raised during focus groups without being prompted were issues that participants had either witnessed first-hand – for example, overcrowded vehicles transporting animals on land – or had become more informed about. Focus group findings suggest that the lack of space and confinement of animals is generally a topic the public is aware of and concerned about (Appendix D, p. 87). Similar to overall concern about farm animal welfare, there is clear trend that the more aware the public is about an issue, the higher their concern will be (Appendix C, p. 73, D, p. 87).

Furthermore, those who believe farm animal welfare is a serious issue are more likely to be morally opposed to farming of animals and to view many agricultural practices as unnatural.

2 There is a high level of concern about the treatment of farm animals and current regulation

2.5 The public's distrust of the industry and government, and the perceived lack of transparency is driving outrage on farm animal welfare

Concern about current animal welfare regulation can be divided into three categories; concern around industry's ability and willingness to adhere to current standards, concern about governments' effectiveness in enforcing current standards, and lastly, concern about whether current regulation is sufficient to address concerns and ensure good animal welfare practices.

Both quantitative and qualitative research results have found that the public worries about low income of farmers and farm workers (Appendix C, p. 33, D, p. 85). This concern, combined with the low price of animal products, have made the public sceptical about whether the industry is capable of maintaining good animal welfare standards while under high financial stress. Focus group findings suggest that in certain cases the public is sympathetic about farmers having to cut corners in order to make a living. Furthermore, there is a perception that the foreign takeover of Australian farms could contribute to increased financial pressure on farmers. In addition, the focus group findings suggest that the public is concerned that foreign ownership could lead to poorer animal welfare outcomes as foreign owned farms are viewed to have lower standards (Appendix D, p. 85).

“ Meat is too cheap, it can't be possible to produce it for that price. There must be something wrong in the industry. ”

Browser focus group participant, Melbourne

While quantitative research shows an alignment with positive statements on the Australian federal government's efforts to ensure good animal welfare standards, the statement with the highest level of disagreement is “the Australian federal government is effective in enforcing animal welfare standards” (Appendix C, p. 49). Further focus group results suggest that distrust of the industry and government regarding animal welfare bring into question the effectiveness of current regulation. Distrust seems to be fuelled by the perception that there is a lack of transparency and that certain information and practices may be kept hidden intentionally.

The lack of trust extends to the information being put forward about animal welfare and in particular has created uncertainty whether products that are labelled and marketed as free-range, cage-free and organic (which are generally seen to have high animal welfare standards) truly are (Appendix D, p. 90). As there is a perception that the industry has enough power to exert influence over regulation through lobbying and political donations, the belief that there is currently a lack of transparency could trigger certain groups to be critical about the government's independence as a regulator. A small group of participants have mentioned, without being prompted, that they felt a conflict of interest existed because the same regulatory body responsible for the promotion of the agricultural industry was also responsible for ensuring animal welfare standards.

Focus group findings suggests the public generally agrees that in comparison to other countries, standards in Australia are higher and therefore the treatment of animals is likely to be better. However, views on whether animals are being treated well enough under current regulation vary between audience segmentations. Attendees are likely to be dissatisfied with current standards and concerned about how animals are being treated (Appendix D, p. 87). This is supported by quantitative data which suggests the more informed and concerned the public are, the more likely they are to feel as though current regulation is not sufficiently addressing their concerns on specific agricultural practices (Appendix C, p. 45). Browsers and the general public on the other hand either believe current animal welfare standards are sufficient or they have insufficient information to be able to determine how they are being treated. This lack of information about farm animal welfare for many seems to be a concern in itself (Appendix D, p. 89).

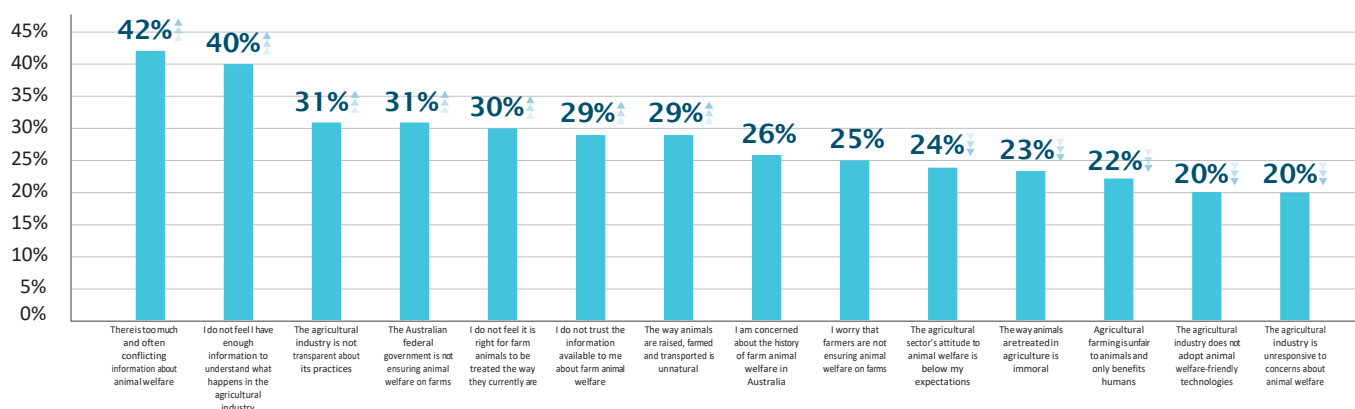
Overall, focus group findings suggest that there is a public perception that the Australian federal government is not responsive to their concerns, whether it is regarding taking accountability to ensure good animal welfare standards or providing the public with sufficient information on the topic.

“ I believe that most of the time animals are treated well, but I have a strong suspicion that there are things happening on factory farms that are out of view. ”

General public focus group participant, Melbourne

Figure 7 Drivers of concern about farm animal welfare

When forming your view of farm animal welfare, which of the following statements are relevant for you?



3 Not responding to changing societal expectations creates a social licence threat for the Department

The Department of Agriculture and Water Resources, and more broadly federal government, face three major social licence threats relating to the issue of farm animal welfare. First is the potential for issues in the media or public discourse to draw uninformed audiences into debates on farm animal welfare, which can result in reactive calls for extreme regulation, as seen with the live export issue. Second is a gradual demand for more effective regulation by a growing group of highly informed stakeholders that are aligning with activist views. Third, and most significant, is a strong belief that the federal government is the key government authority responsible for regulating farm animal welfare. This is the view across both less-informed and highly informed groups, despite the government's lack of constitutional power to create reform. This has the potential to result in outrage, particularly if the community sees the government as not responding to concerns and expectations.

The federal government currently balances two key functions relating to farm animal welfare which can be defined as its policy function; promoting agriculture in Australia and supporting agricultural communities, and its regulatory function; promoting animal welfare standards. Focus groups identified a call for more education, stricter regulation and tougher enforcement. This indicates that the public's expectation goes beyond the federal government's current role of developing farm animal welfare guidelines and encouraging the take-up by states and territories. This gap, combined with distrust, and a perceived lack of responsiveness and transparency on issues relating to farm animal welfare means the government has the potential to be subject to significant community outrage if it does not adopt a third element into its functions - outrage mitigation. Even if the Department responds to increasing calls for improvements in farm animal welfare through policy it is unlikely to reduce outrage as policy solutions will not address the underlying emotional drivers that have shaped the public's concern. Public policy tends to address risk by providing a technical solution to address hazard or the technical assessment of risk, the adoption of outrage mitigation however allows an additional solution to address the public's concern and outrage.

3.1 Threat 1: When confronted with farm animal welfare issues, previously uninformed audiences will demand extreme regulation to resolve their concerns

There is a section of the Australian population who have been identified in the research as uninformed and unaware of agriculture practices and farm animal welfare issues. The quantitative research has shown that these members of the public are less likely to view farm animal welfare as an issue or to call for reform (Appendix C, p. 44, 63). However, when confronted on these issues through widespread media attention they will be outraged and demand an immediate response to resolve their concerns. The analysis shows that these demands are likely to crystallise around calls for stricter and more extreme regulation and as such present a key social licence threat to the Department.

Exposés and media scandals have the capacity to trigger uninformed members of the public to become aware of an issue. The recent exposé relating to the death of 2,400 sheep at sea is one such example that has drawn the attention of everyday Australians who may have otherwise been dormant on the issue of live export. The impact of the recent live export exposé is reflected in quantitative research findings which indicate that live export is the main driver of concern for the less-informed members of the population sample (Appendix C, p. 33).

It is important to note that this concern does not seem to be limited to sheep but rather relates to live export in general suggesting that issues are not viewed in isolation. This creates the risk that the public is likely to demand for a blanket regulation or ban, rather than call for issue specific regulation.

The research indicates that this immediate response for extreme regulation and quick implementation may be underpinned by a latent response to an internal conflict between a desire for affordable meat, and the desire to be free of guilt associated with how that meat is produced. While the public may want to remain ignorant to certain agricultural practices, they are challenged on this internal conflict when confronted. This was elicited in the focus groups, where uninformed members of the population place full responsibility on government (Appendix D, p. 94). This reflects a perception from less-informed members of the public that it is not the responsibility of the consumer to inform themselves of issues concerning farm animal welfare and that rather it should be the regulator who ensures that farm animal welfare standards are upheld and clear information is provided.

“**If animal welfare was regulated properly by the industry and the government the consumer wouldn't have to make a choice, they would be ensured that the animal products they bought had good animal welfare standards.**”

Browser focus group participant, Brisbane

The analysis also revealed that uninformed and less-aware segments of the population have expressed confusion when trying to comprehend information around animal welfare issues as a result of an insufficient amount of information, or its overcomplexity (Appendix C, p. 53). This confusion has the capacity to provoke outrage based on members of the population feeling as though farm animal welfare issues lack transparency or are deliberately complicated to make them inaccessible to the general consumer.

Following the current trajectory of the social maturity curve, we could expect growing numbers of exposés and media scandals implicating farm animal welfare issues. Less-informed members of the general public will continue to call for more dramatic and firm regulation as farm animal welfare issues become public presenting a growing social licence threat for the government. A perceived lack of responsiveness from the government relative to these concerns will only amplify outrage and extend the expectations of these members.



3 Not responding to changing societal expectations creates a social licence threat for the Department

3.2 Threat 2: A growing section of the public aligns with activists' views and is demanding stricter regulation

The social maturation curve has demonstrated that over the past eight years, there has been a steady increase in the social maturation of farm animal welfare. This growth reflects an increasing degree of media attention, activism and critical debate, as well as a growing portion of the population's awareness around the issue of farm animal welfare. The curve shows that this trend will continue to grow in coming years, suggesting increasing sections of the population will become informed and drawn into the debate on animal welfare. In addition, quantitative and qualitative research shows that a large segment of the population currently aligns with activists' criticism of the industry. This segment of the population that aligns with activist statements is furthermore expected to increase. This is further supported by evidence that the average age of highly informed and concerned members of the public is 6.9 years younger than that of the population that is ambivalent to issues of farm animal welfare (39.7 years, relative to 46.6 years) (Appendix C, p. 28). As a result of these trends we can conclude that as younger generations mature they are likely to become highly informed around issues of animal welfare.

Quantitative and qualitative research indicates that the more knowledgeable a member of the public is on farm animal welfare issues, the more likely they are to display concerns around these issues (Appendix C, p. 63, D, p. 87). With an expanding informed segment of the population concerned about farm animal welfare, demand for a solution will also increase. The research reveals that this segment of the population is likely to demand better animal welfare outcomes through regulation. This presents a threat, as the more informed and concerned a member of the public is, the more likely they are to demand significant reform for animal welfare as shown in Figure 8.

“ I am concerned about environmental aspects of farming. It is resource intensive to produce meat. ”

General public focus group participant, Perth

“ Antibiotic resistance is being caused by farming practices. There are health issues associated with the use of antibiotics and hormones in meat. ”

General public focus group participant, Brisbane

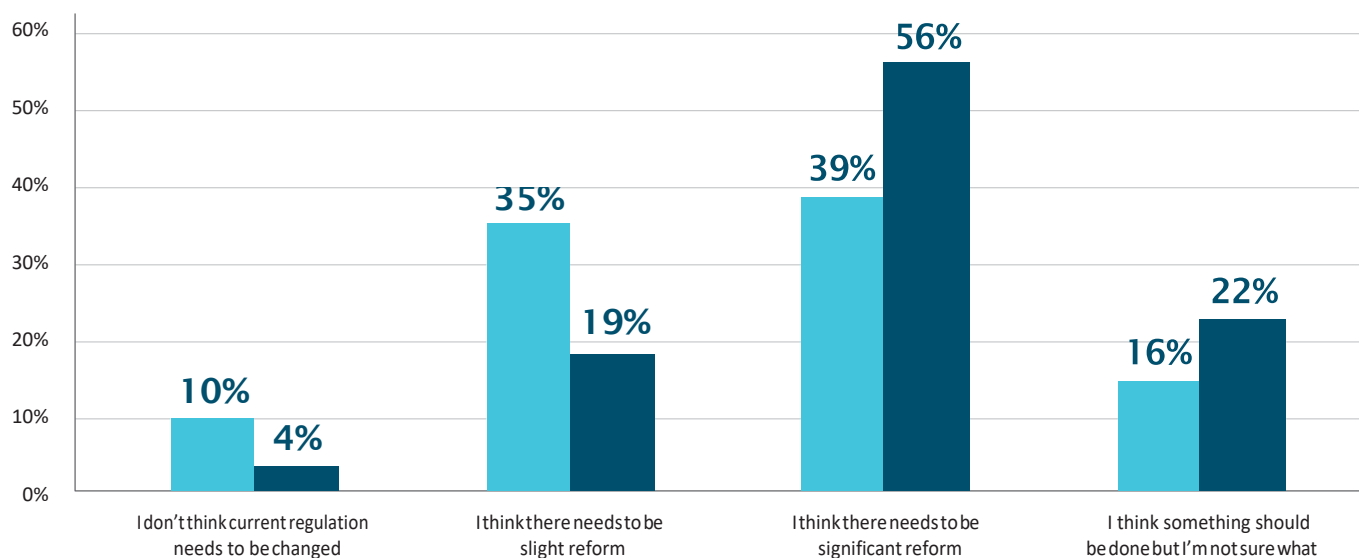
“ I eat vegetarian meals more frequently as well as kangaroo meat. The reason for this is concern for the environment. ”

Attentive focus group participant, Brisbane

Figure 8 Views on current animal welfare regulation

■ Rest of sample ■ Very informed and concerned

Which of the following best describes your view on the action required on animal welfare regulation in agriculture?



3 Not responding to changing societal expectations creates a social licence threat for the Department

3.3 Threat 3: Federal government is seen as highly responsible for ensuring good farm animal welfare standards

Threat 1 and 2 are especially significant for the federal government, as both highly informed and general members of the public believe that the Australian federal government holds the highest degree of responsibility of any governmental level to ensure farm animal welfare (Appendix C, p. 55). This presents a fundamental social licence threat to the federal government, as the complex regulatory framework around issues of farm animal welfare doesn't afford it the necessary power to respond to these concerns.

Research reveals that highly informed segments of the population are undecided as to whether the Australian government is effective in enforcing animal welfare standards (Appendix C, p. 51), a sentiment that is also reflected in focus group findings. This illustrates the high expectation on the federal government to regulate on issues of farm animal welfare, however the quantitative analysis reveals those most informed are undecided on its capacity to do so.

Appendix B provides a framework for analysing common shifts in expectations of regulators. As the federal government is perceived to be the most responsible form of government for ensuring animal welfare standards, these expectations will fall on it to a large extent. The framework identifies that in challenge phase, the regulator is criticised for failures to punish breaches in animal welfare standards and develops agendas for new policies. We can see this latter point emerging in relation to the issue of live export and the establishment of an independent animal welfare office.

The current regulatory environment has the potential to provoke significant outrage in the general public if the federal government is found by the general public to be unable to regulate on farm welfare issues that are becoming increasingly present in the national discourse. This outrage has the potential to manifest itself in one of two ways. The first is a loss of faith in the federal government's capacity to protect animal welfare standards, which may result in increased pressure on farmers, state governments and industries, provoke activism, and impact the government's reputation. The second is for expectations to mount on the federal government to take more action and enhance its role as regulator of animal welfare standards and enforcer of animal welfare outcomes.

“ The federal government is reactive to investigative media but is not proactively seeking to find solutions. Regulations are there if the government wants to use them but it is not being enforced. ”

General public focus group participant, Perth

“ Teachers are being held accountable for higher levels of student achievement, the federal government should ensure farmers have the same level of responsibility over their animals to ensure good animal welfare standards. ”

Attentive focus group participant, Brisbane

“ The Australian government should be making sure that farmers are doing their job and responsibility isn't being pushed down to consumers. Regulation needs to be better. ”

Attentive focus group participant, Melbourne

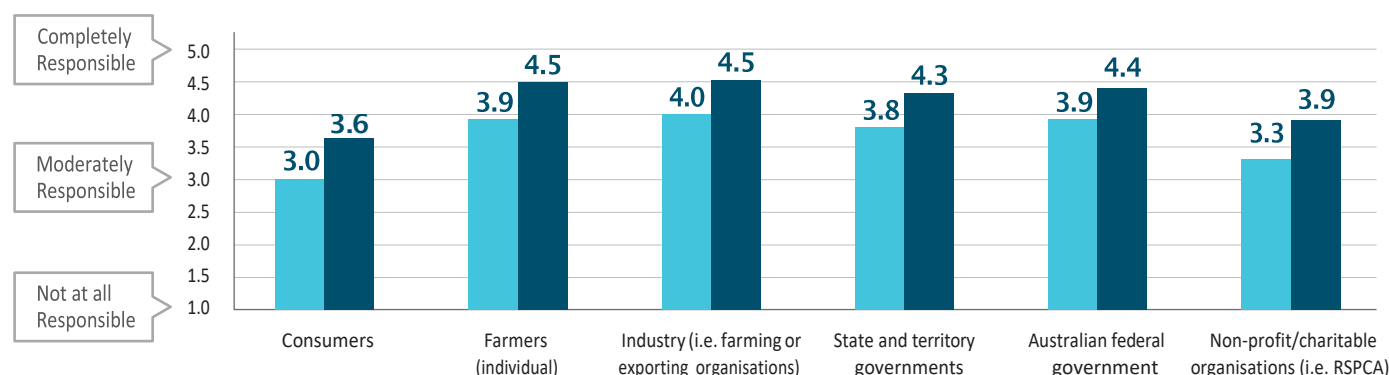


Quantitative and qualitative research found that the public views fish as being one of the least sentient animals

Figure 9 Level of responsibility

How responsible do you think the following should be for farm animal welfare?

Rest of sample Very informed and concerned



3 Not responding to changing societal expectations creates a social licence threat for the Department

3.4 Strengthening the Department's approach to farm animal welfare by developing an outrage mitigation strategy

Currently, the federal government's role in the agriculture sector has two aspects: supporting the agricultural industry in Australia and promoting good animal welfare standards across the industry. A large group of participants, after being informed about these two roles, believed it was a conflict of interest for one government body to be responsible for both. This is in addition to a few participants who, without being prompted, said they felt the federal government has a conflict of interest in ensuring good animal welfare standards. Given this perception, and mounting pressure on the federal government to lead regulatory change despite its limited capacity to act on farm animal welfare regulation, it is recommended that the Department develop an outrage mitigation strategy to reduce this risk and strengthen its policy and regulatory functions.

To effectively address risk, it is important to understand that it is made up of two components namely hazard – the “expert’s” assessment of technical risk – and outrage – the public’s perception of risk often driven by emotions and instinct. Importantly, these two elements of risk are barely correlated (Appendix E, p. 97).

Policies and regulations targeting farm animal welfare seek to address risks associated with harm to animals and might incorporate technical concerns raised by activists, lobbyists opposition parties or critics. The expectation is that critic’s concerns and demands will fall away, however this approach only provides a technical solution and disregards outrage. Outrage requires a specific approach to mitigate which cannot be resolved through technical solution, such as policy or regulatory reform, alone.

Outrage mitigation is predicated on addressing the emotional factors that sustain a conflict. This involves sharing dilemmas with the general public, acknowledging where there are gaps in performance, policy or regulation where the government could improve, and developing a vision for policy and reform that seeks to incorporate public concerns. It is based on working with the public, rather than making decisions on behalf of the public, to produce policy and regulation that meets current trends and needs and allows the government to reach best practice.

There are a total of 12 factors that determine outrage for an issue (Appendix E, p. 97). An analysis of quantitative and qualitative data has indicated that the top outrage factors relating to farm animal welfare are Trust, Level of Certainty and Understanding, Responsiveness and to some degree Natural vs. Artificial and Moral Relevance. These outrage factors identify the emotional drivers of the public’s concern, give insight into what specific sub- issues or even solutions are likely to trigger outrage, and provide the basis to mitigate outrage and thus risk. A description of the top outrage factors relating to farm animal welfare and high-level recommendations to mitigate outrage is provided in Figure 10 on the following page.

“ Government should make sure that there isn't any conflict of interest. There should be no political donations from the industry that will get in the way of ensuring good animal welfare standards. ”

Attentive focus group participant, Melbourne






“ There should be accountability and real enforcement. Fines aren't enough, there should be true consequence and a carrot and stick approach. ”

Attentive focus group participant, Brisbane



3 Not responding to changing societal expectations creates a social licence threat for the Department

Figure 10 Outrage factors relating to farm animal welfare

Outrage Factor		Mitigation Strategies
<p>Trust</p> 	<p>There is a lack of trust in and perceived lack of transparency of the industry and government relating to farm animal welfare. There is a sense that certain agricultural practices are purposefully being kept hidden and that behind closed doors industry is influencing policies and regulation. In addition, the public does not trust the information provided on farm animal welfare or any of the certification and labelling process (i.e. organic, free-range), which are perceived to have higher animal welfare standards.</p>	<ul style="list-style-type: none"> • Declare where you are, acknowledging past failures and current challenges. • Acknowledge that the public may not trust you. • Release information candidly without excuses or explanations. • Involve key stakeholders in important decision-making to regain trust.
<p>Level of Certainty or Understanding</p> 	<p>There is a perceived lack of objective information on farm animal welfare. The information available is seen to be biased and conflicting making it difficult for the public to form a view on the topic.</p>	<ul style="list-style-type: none"> • Do what you can to increase awareness and information on the issue and when uncertain acknowledge that you don't have all the information.
<p>Responsiveness</p> 	<p>There is a perceived lack of responsiveness by industry and government to the concerns of the public. In addition, the public views current actions to be insufficient to ensure good farm animal welfare standards.</p>	<ul style="list-style-type: none"> • Provide clear and accurate information. • Respond to concerns by acknowledging past wrongdoings. • Show respect for all stakeholders' views, including activists and engage with the community.
<p>Natural vs. Artificial</p> 	<p>To some segments of the public farming and in particularly certain agricultural practices are seen as unnatural.</p>	<ul style="list-style-type: none"> • Acknowledge the artificial nature of the hazard and avoid comparisons with natural processes as it can increase outrage.
<p>Moral Relevance</p> 	<p>By some attentives and the more informed segments of the public, the breeding and killing of animals is seen as something that is inherently immoral.</p>	<ul style="list-style-type: none"> • Acknowledge stakeholders have a legitimate moral point. • Where an activity or an outcome is seen to be fundamentally immoral, it may be necessary to set a target of zero for these things, even if technically zero risk is unachievable.

Next steps

Based on the quantitative and qualitative findings discussed in this report, Futureye recommends the Department to consider the following possible next steps:

Farm animal welfare regulation benchmark

A benchmarking process would allow the Department to map out current regulatory requirements and enforcement mechanisms across states, territories and federal government and identify any gaps by comparing it to international standards - such as those developed by the World Organisation for Animal Health (OIE) – as well as public expectations. Findings of this process can be used to drive improvements.

Research into farmers' views on farm animal welfare

Specific research into farmers' perception of farm animal welfare would allow the Department to understand the farmers' views, the underlying drivers and the influence it has on their practices. Gaps can be identified and the Department can explore whether financial incentives, or other strategies can encourage behavioural change.

Research into overcoming barriers to adoption of improved animal welfare practices on farm

Research into the barriers provides the Department with the opportunity to identify, measure, assess and govern the reasons behind industry resistance. This research would inform the development of a shared vision for animal practices on farm.

Building trust in the certification and labelling process of animal products

The current quantitative and qualitative research found that there is a lack of trust in the certification and labelling process for products that are perceived to have higher animal welfare standards such as free-range and organic. By providing the public with objective information and engaging with stakeholders on this issue the Department can start to rebuild trust and ensure that consumers feel they have sufficient information to make an informed choice when buying animal products.

Exploring options for and promoting technology to reduce harm to animals

Current technology and innovation relating to farming practices is primarily driven by cost effectiveness. By initiating research into options that reduce harm done to animals and thereby increasing farm animal welfare standards would allow the Department to explore solutions that address concerns.

Developing a stakeholder and activists engagement strategy

Activists and stakeholder engagement can reduce concerns around farm animal welfare if conducted effectively. To do this stakeholder mapping would be undertaken to identify key stakeholders and the major issues that concern them, followed by consultation.

Developing a rapid response kit and messages for farm animal welfare issues

A rapid response kit outlines the background, key dilemma-sharing messages and supporting facts and examples for various critical issues to provide the Department with a living resource for immediate response as issues arise.

Appendix A – Futureye Social Maturity Curve

The Futureye social maturity curve tracks the change in maturity of social issues

The social maturation curve is a way to visualise the emergence and evolution of social issues and anticipate their future development. The curve collates data about public sentiment and uses clearly defined turning points to demonstrate an issue’s level of “social maturation”; that is, how present it is in the public consciousness, which key figures and bodies are talking about it, and what society is demanding.

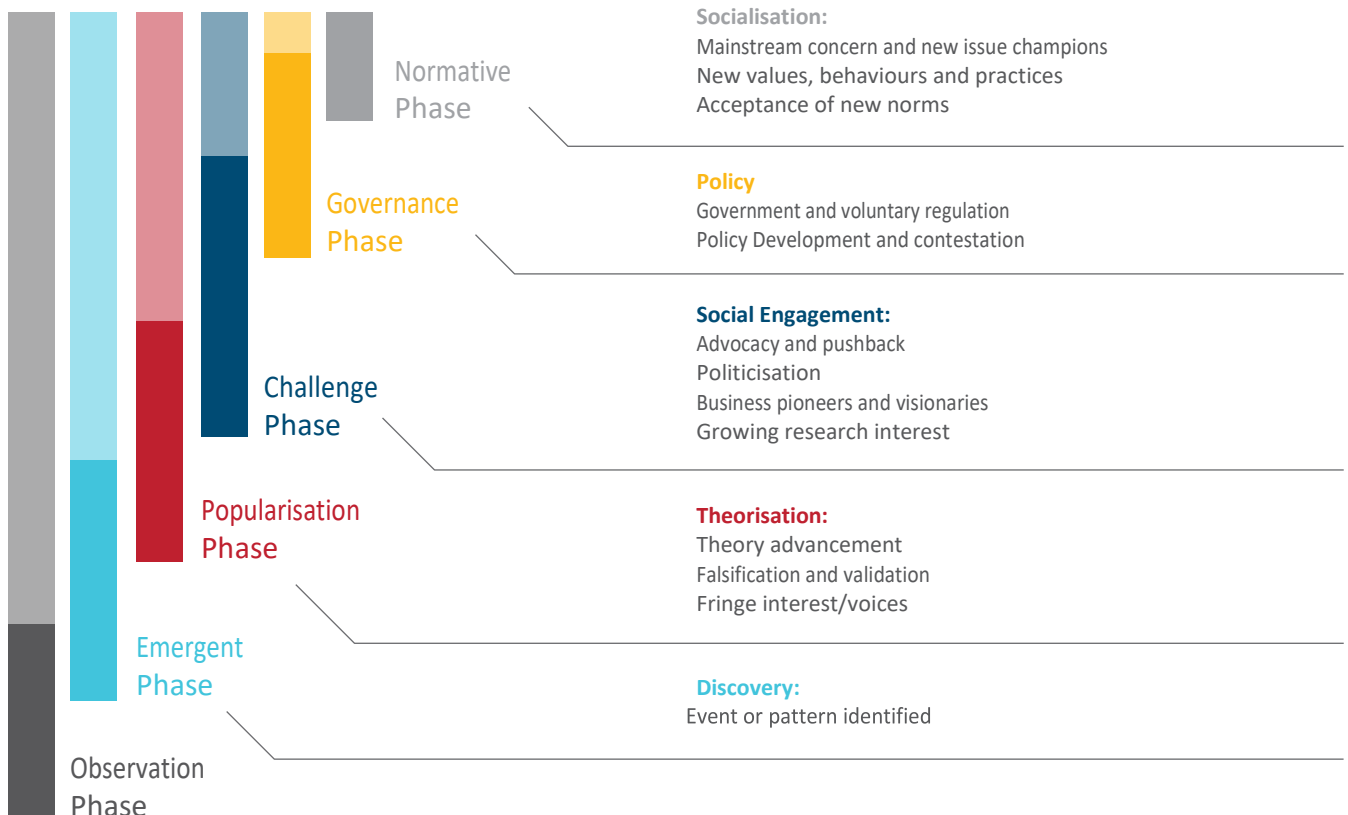
Similar to the concept of “technology curves” which track how new technologies go through generic developmental stages such as concept development, prototyping, creation of commercially viable applications, and diffusion, the curve measures events against a framework of indicators to determine the current phase of maturity.

Understanding where an issue sits within this framework helps explain current social expectations and predict future public, stakeholder, and activist pressures.

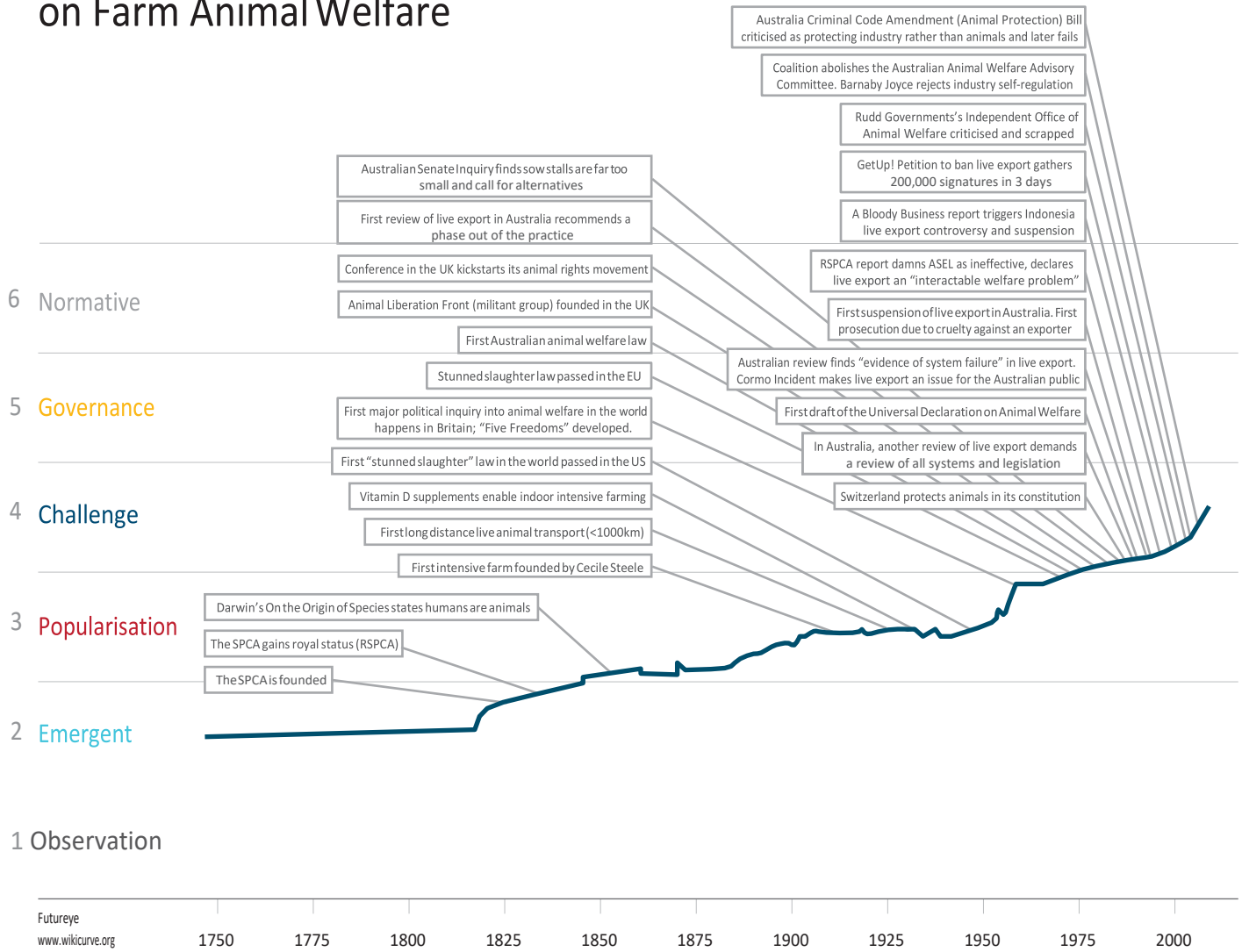
The curve is traced over six phases:

1. **Observation phase**, where a pattern is first identified;
2. **Emergent phase**, when theories about the pattern are advanced, fringe interests around the theories form and there is greater falsification and validation of the theories through organisations, further research, and enhanced observation;
3. **Popularisation phase** signifies growing awareness, where media coverage about the issue (in part or as a whole) begin to emerge and mainstream, likewise issue-specific organisations form;
4. **Challenge phase** is about societal engagement, where advocacy and pushback about the issue occur, there is greater politicisation and business pioneers and visionaries form. There is growing research interest in the field as well;
5. **Governance phase**, when policy is developed and contested and government and voluntary regulation are put into place;
6. **Normative phase**, when socialisation and mainstreaming of the issue occur, new issue champions emerge and new values, behaviours, and practices are formalised to be accepted as new norms.

These phases represent observable changes in the level of social issue maturation, rather than more common measures such as public awareness or the level of media presence.



Social Maturity Curve on Societal Expectations on Farm Animal Welfare



The story of farmed animal welfare relates to the philosophical debate on animal sentience, the emergence and sophistication of animal welfare activism and the narrative of human and on-farm animal interactions.

This social maturation curve picture above was traced against the question, "How have the community impressions of the welfare of farm animals changed over time?"

The curve identifies that the issue of farm animal welfare currently sits in challenge phase indicating an increasing amount of mainstream group formation, advocacy and pushback, and politicisation. Emotive images of animal welfare abuses and growing ideas about the rights of animals are driving increasing maturity of farm animal welfare.

The issue has grown in politicisation and has effectively challenged the status quo as the public has become increasingly aware of farm animal welfare issues. Given the current trajectory of the issue, the likely medium-term future development is that a more informed public will begin rewarding businesses that meaningfully accommodate farm animal welfare, and start demanding more effective regulation from government with regard to farm animal welfare.

Just as politically conscious people have become educated about the exploitative labour practices and environmental degradation that can arise in the global economic system, they are also starting to question industrial animal exploitation, which has steadily increased in the last 50 years. Many of the public now support the activist views that animal welfare isn't being sufficiently delivered by the agricultural sector for today's values.

The following pages provide a detailed description of the different phases of the curve on farm animal welfare.



Phase one: Observation

Ancient societies and religions drive early theorisation of animal sentience

6 Normative

5 Governance

4 Challenge

3 Popularisation

2 Emergent

1 Observation

Futureye
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Differing attitudes and beliefs regarding the relationship of humans to other living beings has been a contested topic for civilisations. The absolute view, that human life is not within the gift of humankind, was first embraced by the ancient religions of Southwestern Asia with many extending this view to animals. The teachings of “ahimsa” or non-violence towards all living things was disseminated by early adopters of Hinduism, Jainism and Buddhism from 1000BC. Abandonment of animal sacrifice in these religions resulted in widespread vegetarianism. Elements of this ideology extended through to the Abrahamic religions which provided provisions for humane treatment practices during animal sacrifices in 900BC.

Further to the influence of religions on human and animal relationships, the ancient societies of Greece and Rome also played an important role in the formation of attitudes towards animals. The notion of animism and vegetarianism was first professed by Ancient Greek mathematician

Pythagoras in early 500BC, who theorised that animals and people have souls similar in nature which transition from human to animal in succeeding incarnations.

The father of vitalism, Aristotle, in mid-300BC argued that humans stood atop a hierarchical model of creation because they possessed rationality.

Irrational non-human animals were thus placed under the dominion of and subject to rational beings, hence, animals could be killed for food and used for human benefit. This marked the first creation of a taxonomical categorisation of animals. Theophrastus, one of Aristotle’s pupils, challenged his superior’s view professing that eating meat robbed animals of life, arguing that animals possess rationality and were morally equal. However, it was Aristotle’s anthropocentric dominionism that persisted largely unchallenged in societal discourse throughout the following two thousand years.



Phase two: Emergent

Societal discourse on animal sentience develops, resulting in early legislation

Following the early developments found in the Ancient societies, theorisation and societal discourse on the welfare of animals advanced with rapidity.

In mid-250BC, following numerous military conquests, the Indian Emperor Ashoka propounded a ban on meat-eating, representing the first enforced animal rights laws in the Indian subcontinent. Ashoka's edicts, which identified animals as citizenry, spread throughout the region including messages prohibiting animal slaughter for religious sacrifice. But even as a converted Buddhist and an evangelist of vegetarianism, Ashoka acknowledged the challenges he would face forcing dietary restrictions on his largely meat-eating citizens. He thus placed emphasis on the welfare of the animal as the key driver for societal buy-in, placing a ban on animal sacrifice, and regulating practices such as castration and construction of veterinary facilities.

Following the permeation of vegetarianism in the Indian subcontinent, societal discourse on the topic in the Ancient societies of Greece and Rome gathered steam. In 30AD, Roman philosopher Seneca denounced the cruel practices upheld in the Roman Coliseum and adopted vegetarianism. The Greek philosopher Plutarch followed suit in 80AD and alluded to the impacts that meat eating has on the human digestive system, pointing out to the lack of claws and beaks as evidence that humans should abstain from eating meat.

The philosophers Plotinus (240BC) and Porphyry (270BC) each sought to advance theories that aimed at evidencing animal sentience. Plotinus advocated for what is now termed Neoplatonism, holding that all animals feel pain and pleasure, not just humans. He avoided animal-based medicines and taught that while wool harvesting and animal labour was permissible, non-human animals should be treated humanely. Porphyry employed observational and historical evidence to prove that non-human animals possessed rationality, as a result of this quality he argued that they must be included in commonly upheld justice practices.

Over the next 400 years efforts to protect the welfare of domestic farmed animals took place in both the East and West. In 675AD, due to his devout Buddhism, the Japanese Emperor Tenmu banned the killing and eating of beef, horse, dog, monkey and chicken but permitted fish and game. But it was only in 1635 that the first piece of Western legislation aimed at protecting the rights of animals was introduced. Ploughing by tail was a popular way for impoverished farmers in 17th century Ireland to turn up soil and involved a short plough being attached directly to a horse by the animal's tail. From the farmer's perspective, it was economically viable to plough in a way that required no capital investment in harnesses or larger ploughs. Although the pain to the horse was unquantified the immediate debilitating damage to the animals proved counterproductive. This spurred Thomas Wentworth to initiate a ban on the ploughing by the horse's tail and the pulling of wool off live sheep. This was met with criticism, however, as what at first blush seems to be a landmark anti-cruelty law was perceived to have deep politicised origins.

Many argued that its primary motivator was the colonial English implementing it as a tool of oppression against the Irish. By 1641, first signs of animal welfare laws emerged across the Atlantic. The initiation of the Massachusetts Body of Liberties was the first legal code established by European colonists in New England and included regulations against "Tyranny or Crueltie" toward domestic animals. These laws persisted up until the turn of the 20th century.

Following the early postulations offered by Pythagoras and Aristotle the philosophical debate on the morality and rationality of non-human animals returned to public discourse over the renaissance period. The father of modern philosophy, Rene Descartes (1630) reinforced the separation between humans and animals with the assertion that the body is a machine, and what sets humans apart from the animal machines would be the lack of rationality, true speech and feeling of pain. Descartes believed that all animal behaviour could be explained in purely mechanistic terms and many of his followers believed that animal crying was just a reflex, similar to the kind of reaction one may get from a type of machine.

It was not until the age of enlightenment that non-human animals received serious attention, largely due to the early utilitarian philosophers. The concept of utilitarianism was first articulated by Jeremy Bentham (1820) who shifted the focus to the practical question of suffering, moving the debate away from the human-animal comparisons to a quantifiable cost-benefit analysis. In deciding whether an action is morally right, the total amount of good the action will bring about is weighed against the total amount of harm that will be caused. Bentham famously proffered: "The question is not: 'Can they reason?': 'Can they talk?': But: Can they suffer?"; arguing the capacity for suffering and not any other criterion is the essential characteristic entitling an animal to equal consideration of moral interests.

Historians argue that there is evidence that Bentham's writings were influential in obtaining what is regarded as the first legitimate form of animal protection legislation aimed at preventing the cruel treatment of cattle in Britain in 1822. The Dick Martin's Act, led by Richard Martin saw the banning of cruel and improper treatment of oxen, cows, heifers, steers, sheep but excluded bulls. Following the momentum of the landmark Act, Martin joined forces with Revered Arthur Broome and abolitionist William Wilberforce two years later to form the Society for the Prevention of Cruelty to Animals (SPCA), the first coordinated activist group devoted to the protection of animals.

The emergence of civil society resulted in intense and effective lobbying against cruel practices against domesticated animals in the UK. The Cruelty to Animals Act in 1835 passed by the British Parliament introduced further protections of cattle and extended protections to all animals irrespective of whether they were domestic or wild in nature. This Act also marked the first piece of legislation that aimed at targeting specific practices with bear-baiting and cock-fighting outlawed and regulated transportation and slaughter methods.

Phase three: Popularisation

Factory farming and civil society gain momentum

Societal engagement on animal welfare sharply increased following the ascent of the SPCA to 'Royal' status in 1840. The RSPCA proved highly influential in lobbying for the inclusion of animal welfare within the paradigm of the UK criminal code. The Cruelty to Animals Act 1849 included prison sentences for unlawful killings and tightened regulation on the "beating, ill-treating, over-driving, abusing and touting of animals".

The American SPCA formed shortly after in 1866 and engaged in intense lobby actions which resulted in the introduction of anti-cruelty statutes across all states by 1907. Philosophy aside, the civil rights and women's liberation movements directed fresh attention to human rights, and an extension of rights principles by analogy to animals proved an easier step than many would have anticipated. The animal rights civil society landscape amplified in both size and reach throughout the 20th century with groups such as the World Federation for the Protection of Animals (1953) and the Society for Animal Protective Legislation (1955) contributing to public conversation. In the US this re-invigorated activist movement led to in the introduction of the Humane Slaughter Act. The Act represented the first "stunned slaughter" law in the world which requires that animals must be completely sedated and insensible to pain at the point of slaughter. This law does not cover chickens.

The early 20th century saw farming practices intensify in the United States to meet rapidly rising demand for meat chicken following World War I. In 1923, Delaware entrepreneur Celia Steele became the first person to farm chickens for meat on a mass scale. This was followed by advancements in the long-distance transportation of livestock after John Tyson transported 500 chickens across 1000km in 1936. Over World War II vitamin supplementation was explored to encourage widescale indoor chicken farming. The experimental incorporation of Vitamin D into chicken feed resulted in the discovery that chickens could be farmed indoors en masse. The UK followed suit following the introduction of the Agriculture Act 1947. The Act offered farmers subsidies as incentive to mechanise their farming practices which introduced factory farming to the European continent.

The start of a renewed interest in animal welfare issues by society at large was associated with the publication of a written piece on intensive agricultural production by Ruth Harrison in 1964 entitled, *Animal Machines*. Driven by her concern on the welfare standards at a time when animal production was increasing in scale and mechanisation, Harrison set about investigating the situation in an objective manner. Reflecting a social norm that had seen wide-scale automation and de-population of agricultural industry, Harrison's work (introducing the term "factory farming" into the animal rights lexicon) appraised readers of the reality of modern farming practices and the implications of the adoption of scientific management in agricultural production.



Phase four: Challenge

Activist movement intensifies

Harrison's Animal Machines sparked a powerful societal reaction, placing immense pressure on politicians in Europe to consider the welfare of farmed animals in a more serious light. In 1964, the British Parliament formed the Brambell Committee to investigate animal welfare. The Committee concluded that an animal should be afforded "Five Freedoms"; "sufficient freedom of movement to be able to turn around without difficulty, groom itself, get up, lie down and stretch its limbs." The following year, the Farm Animal Welfare Advisory Committee, another government initiative, was struck. The discussions and findings of these committees led to a new farm animal welfare law, The Agriculture (Miscellaneous Provisions) Act 1968, which came in to effect in Britain. The Council of Europe passed a directive in 1974 requiring that animals be rendered unconscious before slaughter, shortly thereafter the landmark European Convention for the Protection of Animals Kept for Farming Purposes (1976) was passed mandating that animals must be kept in conditions that meet their "physiological and ethological needs".

In Australia, Peter Singer's Animal Liberation (1975) became the catalyst for the animal welfare movement. Singer made a break with the dominant utilitarian argument that mistreating animals is inhumane, in terms of respecting their right to have their suffering counted equally with that of humans. Singer argued that animals have a "like interest" with humans in one respect: they both have an interest in avoiding suffering. Singer's work also encouraged the publication of hundreds of scientific studies of the treatment of animals in society, greatly progressing the body of knowledge on the topic, and the development of animal welfare as a scientific field.

Singer's Animal Liberation was important because it inspired a cohesive, international movement committed to ending animal exploitation. The movement as it is seen today identifies with other struggles for justice. Many activists, particularly those involved in the actual liberation of animals, compare themselves with early anti-slavery advocates. Many of the tactics and strategies that the movement uses have been borrowed from earlier historic struggles. A number of activist groups emerged following its publication throughout the 1970s bringing rise to the what is now referred to as the modern animal rights movement. Coordinated groups such as Animal Rights International (1974), the "militant" Animal Liberation Front based out of the UK (1976), the Animal Legal Defense Fund (1979) and PETA (1980) drew public attention to factory farming and animal protection concerns.

Singer's prominent advocacy efforts intensified Australia's own animal advocacy movement. Following the publication, state-based RSPCA organisations were formed country-wide as well as Animals Australia in 1980. Critics claim the US animal rights movement was effectively launched in 1981 following a conference organised by the Vegetarian Information Service culminating in the formation of the farmed animal welfare advocacy group, Farm Animal Reform Movement (FARM). FARM quickly named October 2 World Farm Animal Day, proposing to expose the abuse of animal farming and to memorialise sentient animals slaughtered for food throughout the world.

As the movement progressed through to the 1980s, questions of purity divided activists, particularly over whether animal welfare and animal rights are complementary or contradictory. Tom Regan entered the public foray in 1984 controversially proffering that any kind of animal abuse, even if it was relatively benign violates animals' fundamental rights. Regan is now recognised as the architect of the 'actual' animal rights position that animals should hold the same fundamental moral rights as humans. This countered Singer's position that the degree of animal suffering in society cannot be justified in terms of how much it benefits humans. However, while Singer and Regan's positions differ philosophically they both consider the exploitation of animals in society to be unjust.

A series of live export scandals starting in the mid-1980s thrust the trade into the public consciousness. The first Senate review of live export was completed in 1985 that stated on welfare grounds, proposing that the long-term solution would be to replace the trade with refrigerated meat exports and phase it out. A series of highly visual, high profile campaigns and exposés – including recent live export footage – have drawn the issue of farm animal welfare closer to the mainstream discourse.

In 1992 Switzerland becomes the first country to include protections for animals in its constitution, reflecting a broader current of Europe taking the global lead on issues of animal welfare. Following this, in 1998 the European Union banned the use of hormone growth promotants in meat production.

In Australia, live export gains national attention again in 2002, when four shipments of sheep record high death rates during exports to the Middle East, totalling 15,156 sheep deaths during the voyage and discharge phase of the trips. A review commissioned by the Minister for Agriculture, Fisheries and Forestry finds evidence of a "systemic failure" in live export. In 2004 the government introduces mandatory standards for live export, the Australian Standards for the Export of Livestock (ASEL), the precursor to ESCAS. ASEL came under fire in 2008 from the RSPCA, which declared live export as an "intractable welfare problem" due to an inability to be properly enforced. In May 2011, Four Corners aired "A Bloody Business", which sparked controversy on live export of cattle to Indonesia and saw a GetUp! petition to permanently ban all live export gather 200,000 signatures in 3 days. In July 2011, the Australian government announced ESCAS. In March 2018, the future of live exports was again called into question after an expose revealed that 2,400 Australian sheep died en route to the Middle East in August 2017.

A number of high-profile documentaries and campaigns, including the release of Lucent (2014) and Blackfish (2016), attracted national and international media attention. In 2013, PETA and Paul McCartney release "Glass Walls" campaign, stating that if slaughterhouses had glass walls, everyone would be vegetarian. In 2016, PETA release "Artificial Insemination is Rape" campaign. In 2018, vegetarianism and veganism emerge as the fastest growing lifestyles world-wide.

In the US, a series of undercover investigations prompted the introduction of "ag-gag laws" across a number of states in 2012, in an effort to criminalise such investigations. This drove discussions around the world about the efficacy of such laws, and their place in limiting undercover investigations into industries under increasing pressure. Debate is ignited in Australia in March 2018 when the ABC is denied the right to air secretly recorded footage of animal abuse.

The issue of farm animal welfare is yet to move into the governance phase because early governance is defined by meaningful leadership and change within industry and new regulation being developed and passed by government commensurate with the level of community outrage. While there is growing demand for a live export ban and the Australian Labor Party has proposed an independent office of animal welfare, these issues remain unlegislated.

Despite the issue of farm animal welfare in Australia not yet reaching governance, the curve shows a growing awareness of farm animal welfare issues over the past eight years, which indicates an acceleration toward the governance phase.

Where might the story head next?

Activist sophistication: animal rights vs. animal welfare activism

Even among the animal activist experts who don't question a human's right to use and kill animals, there is disagreement over what animal welfare actually means. There is a divide in that for some animal welfare refers to an animal's ability to cope with its environment. "Coping" is quantified with reference to a range of physiological and behavioural factors. For other experts, an animal's welfare is good if it has pleasant feelings. Welfare measured this way requires questions such as whether animals feel neglected in confinement which restricts them from engaging in natural behaviours.

Activist groups working alongside industry

Complementing this shift in perception of precisely what animal welfare is will be the mainstreaming of activist groups working alongside industry. Despite previously competing perceptions on the issue of farm animal welfare, a need to meet societal expectations will prompt this bipartisanship. Industry pressure sees self-regulation become untenable, resulting in a growing need for industry to appeal to the government for changes on animal welfare.

Big business leadership

Big business visionaries will show leadership on issues of farm animal welfare, as has been seen abroad in Europe. Those that fail to act will come under increased scrutiny, as the public takes action against laggards.

Regulator will need to prove it is not in conflict

To meet evolutions in discourse on farm animal welfare, activism and big business leadership, new regulation will be developed to commensurate with the level of social pressure and outrage placed on regulators. In developing these reforms, the regulator will be under intense scrutiny to prove there is no conflict of interest between its policy and regulatory arms.

The fifth phase: Governance

In phase five, major policy responses from business, government, and other relevant actors emerge which reflect and respond to intensifying, new public and corporate governance expectations. Initially, business visionaries are proactive, and 'voluntary' (i.e. ahead of future, expected regulation). Policy is developed, refined, and implemented, and public actions are often taken against laggards. Governance typically occurs before the next normative phase as major issues require institutional responses to enable widespread social actions and in-depth socialisation. Such policies also create new markets.

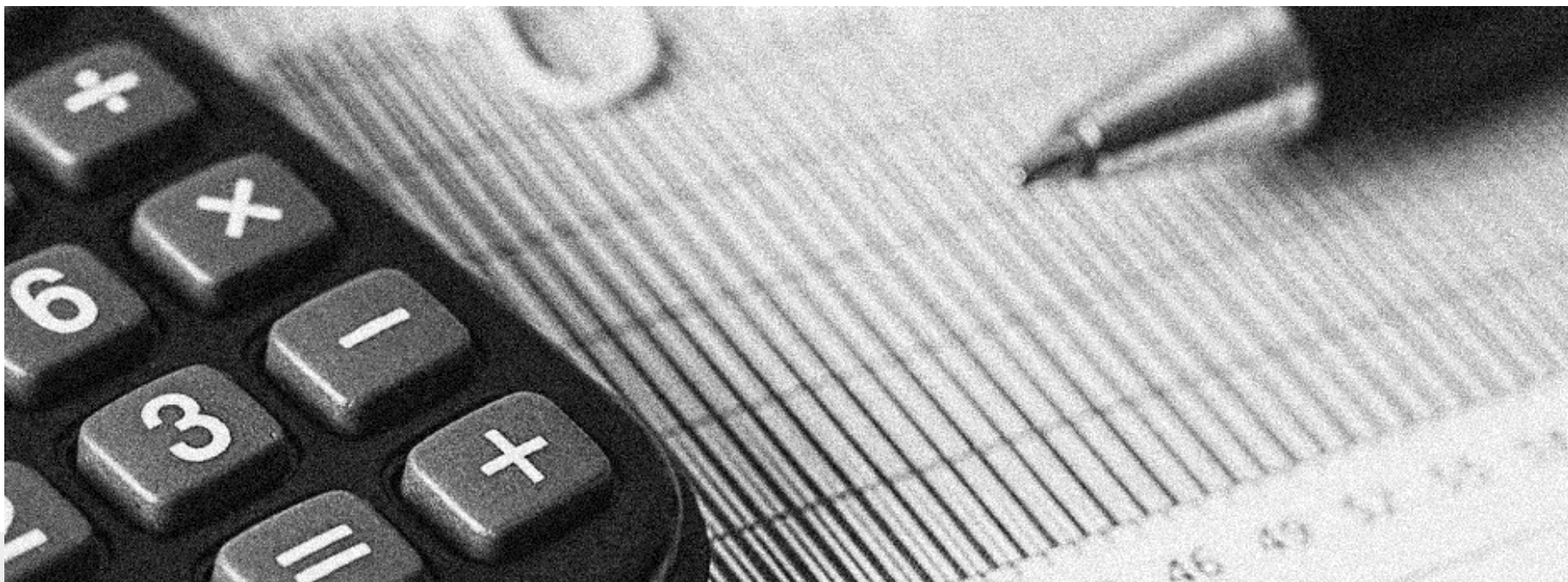
The sixth phase: Normative

The sixth phase is focussed on socialisation, and finds that values around the issue have changed. As a result, industry is pressured to adopt new business models along with new behavioural and social practices that reflect societal values. These new attitudes and behaviours spread and, in time, become the "new normal." Such norming processes typically lead to threats of sanctions against those breaching new norms, regardless of whether their actions are legal or not. Those who uphold new norms are supported. In most cases a (re)solution to the issue will be arrived at in this phase. This phase also involves societal stabilisation.



Appendix B – Regulatory Expectations

Social Maturation Phase	Regulatory regime	Relationship Industry/Regulator	Enforcement	Severity of consequence	Political interference	Political interference to support the status quo
Observation	No regulation specific to issue	Non-existent	None	None	Possible but unlikely	Unnecessary
Emergent	No regulation specific to the issue	Non-existent	None	None	Some voice concerns or dismiss them	No major action
Popularisation	Special interest groups call for specific regulations. Industry dismisses need for external regulation	Regulator attentive to developments	More attention paid to existing regulations	Breaches of existing regulation paid more attention	Fines levied but considered insufficient	Voices on both sides now exist. Some voices clearly support the status quo
Challenge	Regulators begin to set agendas for new policy. Industry tends to insist self-regulation is sufficient	Relationship now under public scrutiny; conflicts of interest drawn into question	Regulator criticised for failures to punish breaches. Self-regulation remains strong, but growingly shaky	Consequences are more frequent and may be tougher than normal. Fines are levied but considered insufficient	Champions emerge on both sides. Issue becomes polarised	Politicians now accused of corruption and/or vested interests. Open campaigns against reform
Governance	Regulations tend to be tough; aligned with outrage rather than hazard. Industry self-regulation significantly weakened	Regulator under intense scrutiny to prove that there is no conflict of interest	Enforcement must be demonstrated and publicly communicated. The dialogue is about “crack downs” and “pulling industry in line”. Self-regulation is untenable	Consequences are more likely and likely severe. While criminal charges are unlikely, regulatory licences are more easily revoked, and fines are punishing	Issue is highly polarised; it may be the base of campaigns. However, pro-regulatory voices become mainstream.	Protecting the status quo is a minority view, but strongly entrenched.
Normative	Regulation is very clear	Regulator is clearly independent. Conflicts of interest are perceived to not exist	Punishment is swift and highly publicised. Breaking the norm is close to reputational suicide	Punishment is swift and severe. Criminal charges may be laid	Issue is considered resolved; polarisation abates	Status quo now protects the new norm. Voices that advocate for ‘the old ways’ are seen as fringe and regressive.



Appendix C - Quantitative Findings

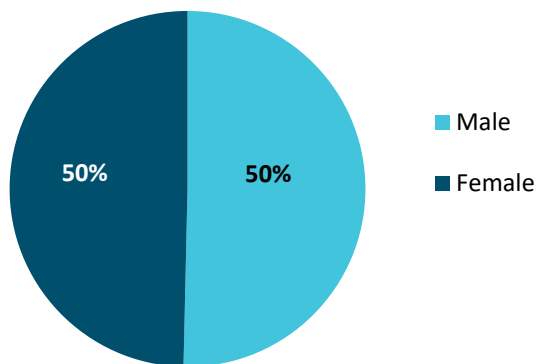
Demographics: Age, gender and State / Territory screener

Total number of respondents: 1,521

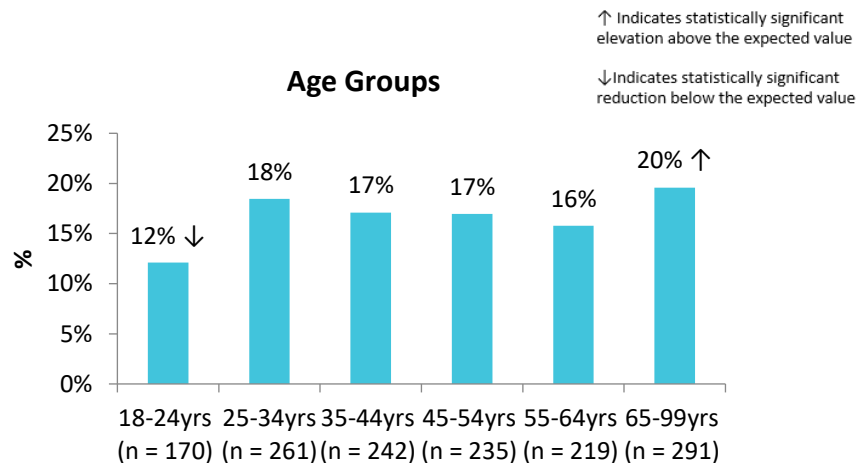
The maximum sampling error for a survey with 1,521 respondents is ± 2.5 percentage points, at the 95% confidence level.

The coverage error estimate for online surveys in general, at minimum, is the difference between the total population and the population that actively uses the internet. The [ABS](#) estimates that 88% of Australians have access to the internet.

Please indicate your gender



Age Groups

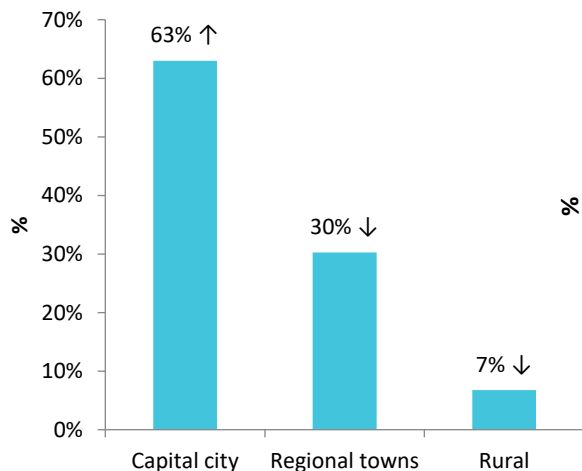


Please select your State or Territory

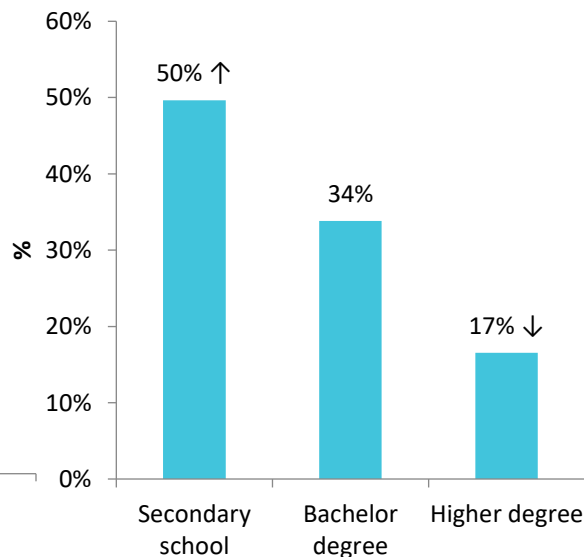


Demographics: Local area, level of education and income screener

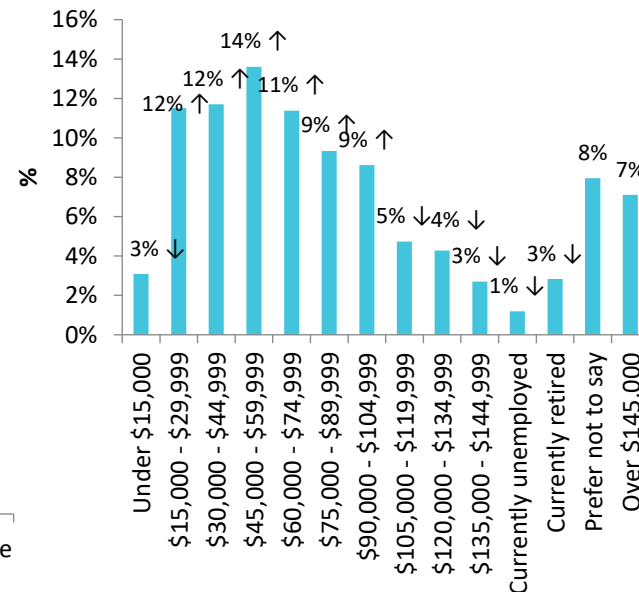
Which of the following describes the area you live in?



Please select the highest level of education you have completed

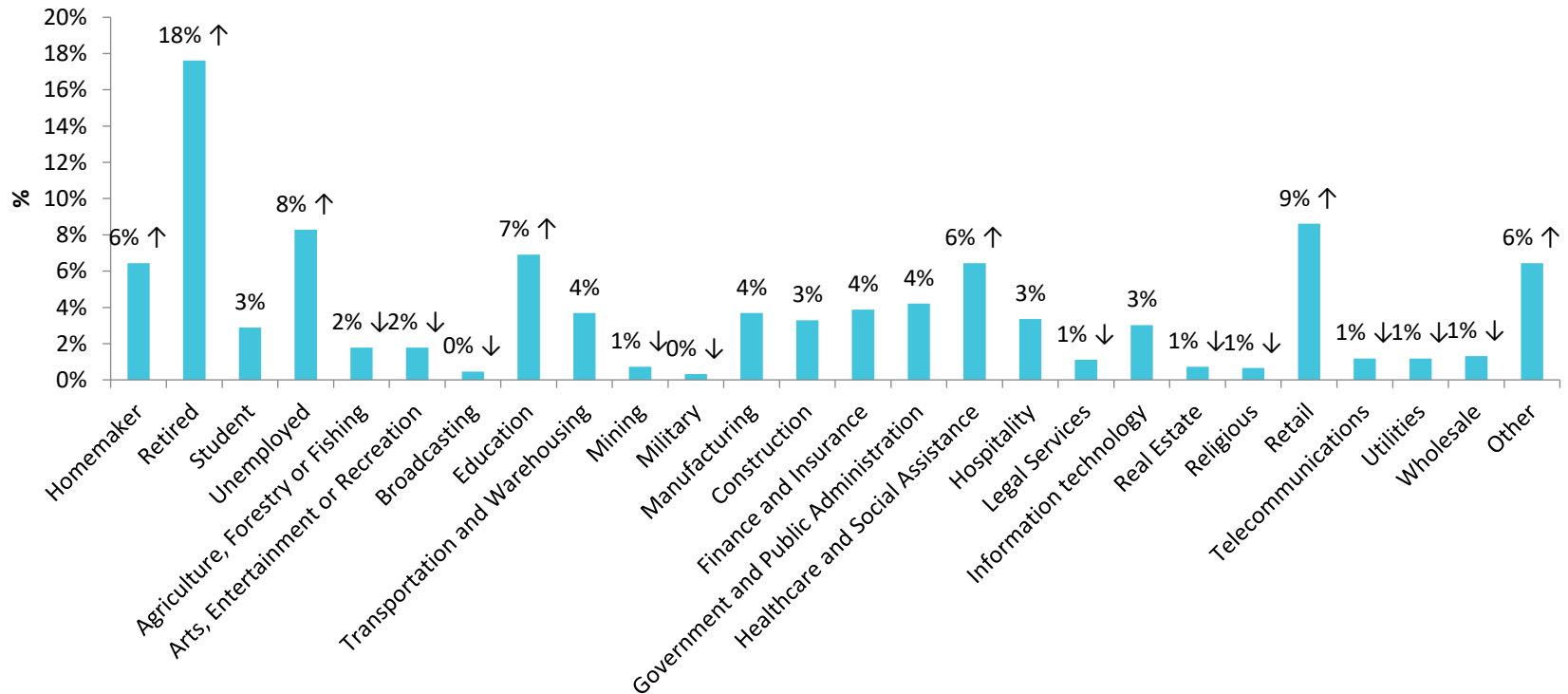


Please enter your household income



Demographics: Employment screener

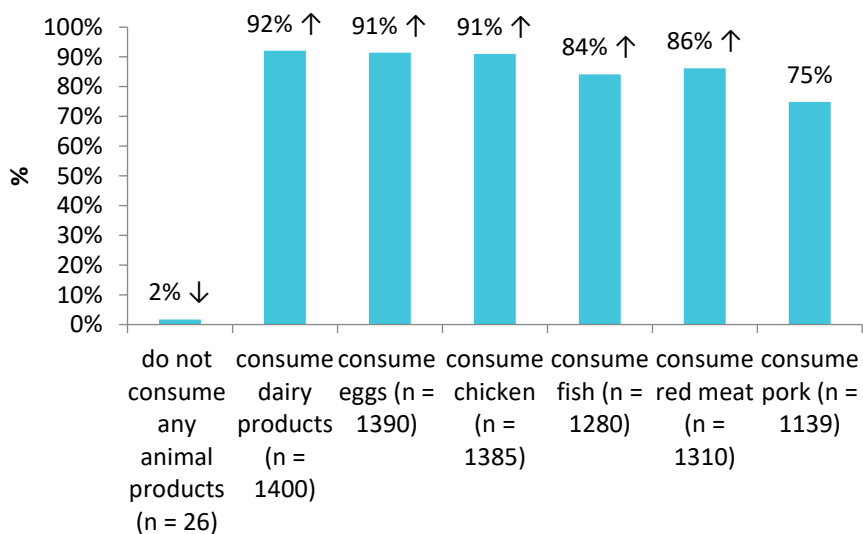
Which of the following categories best describes your primary area of employment?)



Demographics: Diet and agricultural knowledge screener

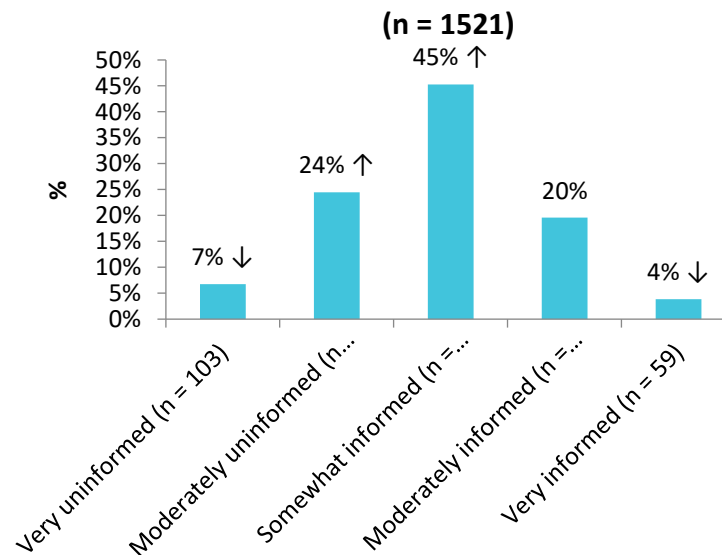
What best describes your dietary preferences?

(n = 1521)



How much do you know about agriculture in Australia?

(n = 1521)

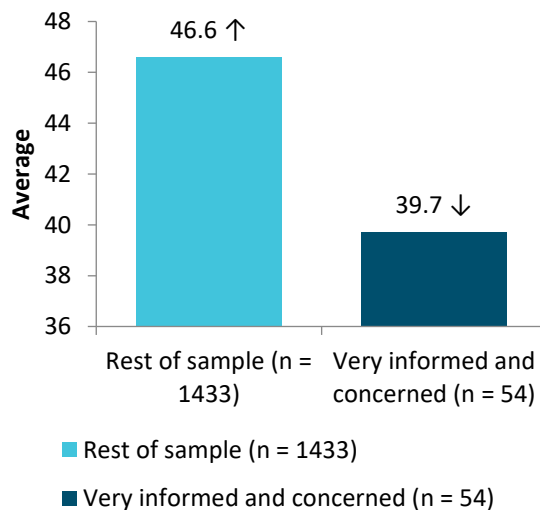


'Very informed and concerned' audience as a segment was created to gain insight into how their views compare with the general public

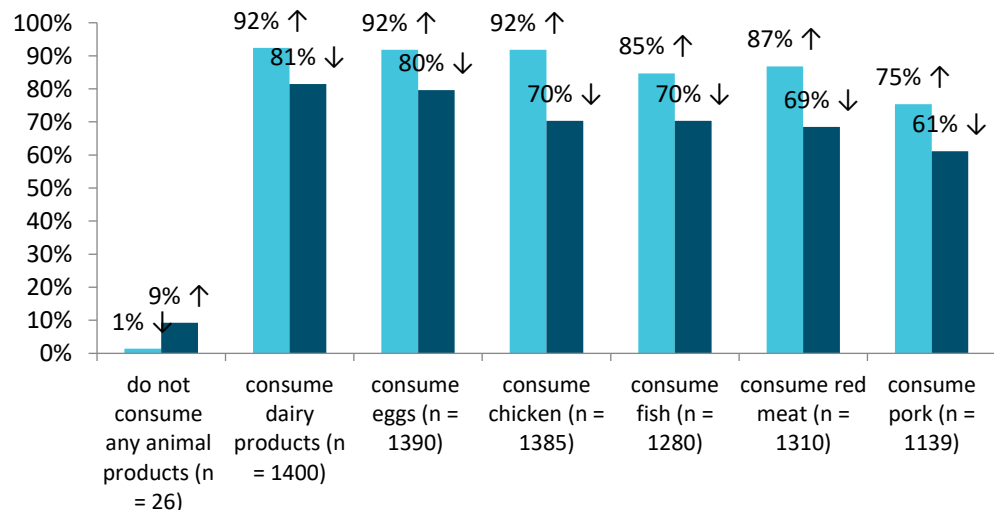
The 'very informed and concerned' audience segment are respondents who responded with 'very informed' to the question 'How informed are you about farm animal welfare?' and 'How concerned are you about the following agricultural practices' – at least 1 'Extremely concerned'. Combined these responses gave 54 respondents who were both 'very informed' and 'extremely concerned' by at least one practice.

The 'very informed and concerned' audience segment on average is significantly younger and consumes less or no animal products.

How informed are you about farm animal welfare? What is your age?

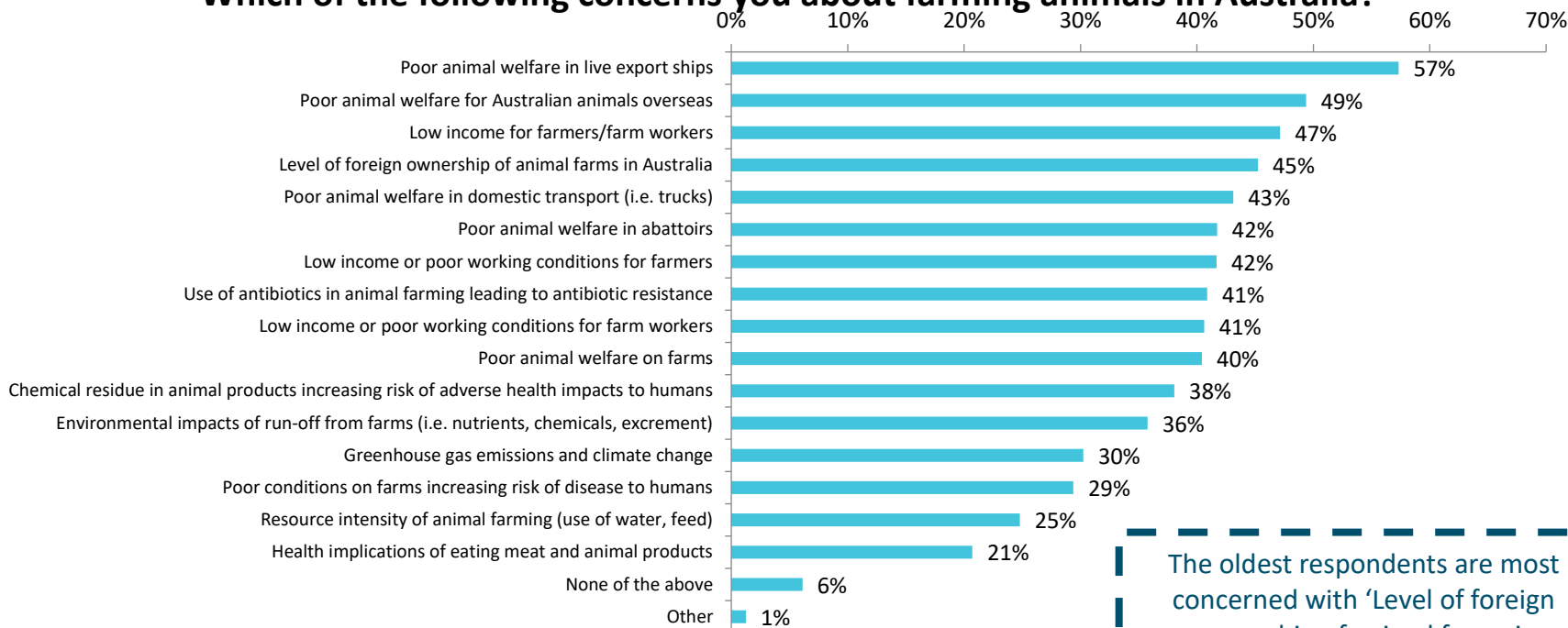


What best describes your dietary preferences?



Live export, poor animal welfare for Australian animals overseas and low income for farmers are identified as the top drivers of concern about farming in Australia

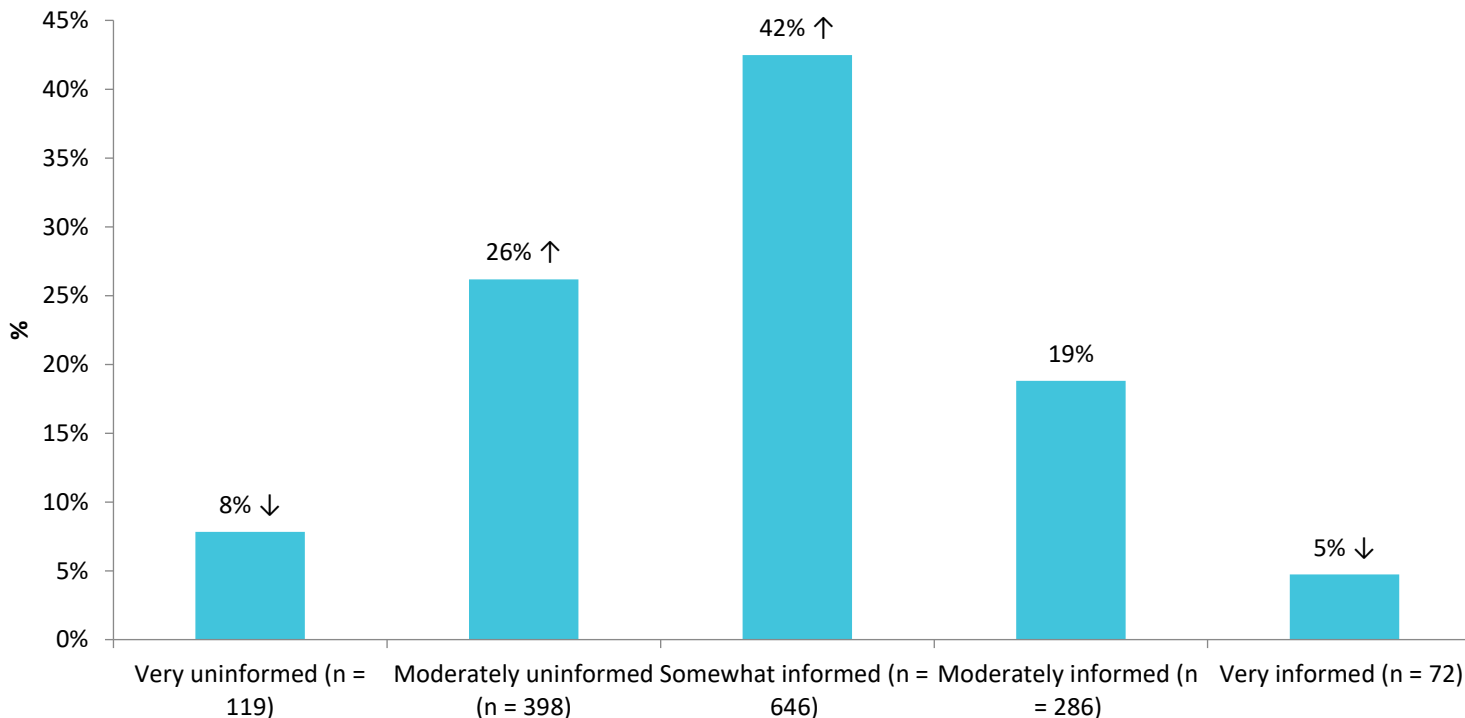
Which of the following concerns you about farming animals in Australia?



The oldest respondents are most concerned with 'Level of foreign ownership of animal farms in Australia', whereas the youngest are most focused on 'Health implications of eating meat and animal products.'

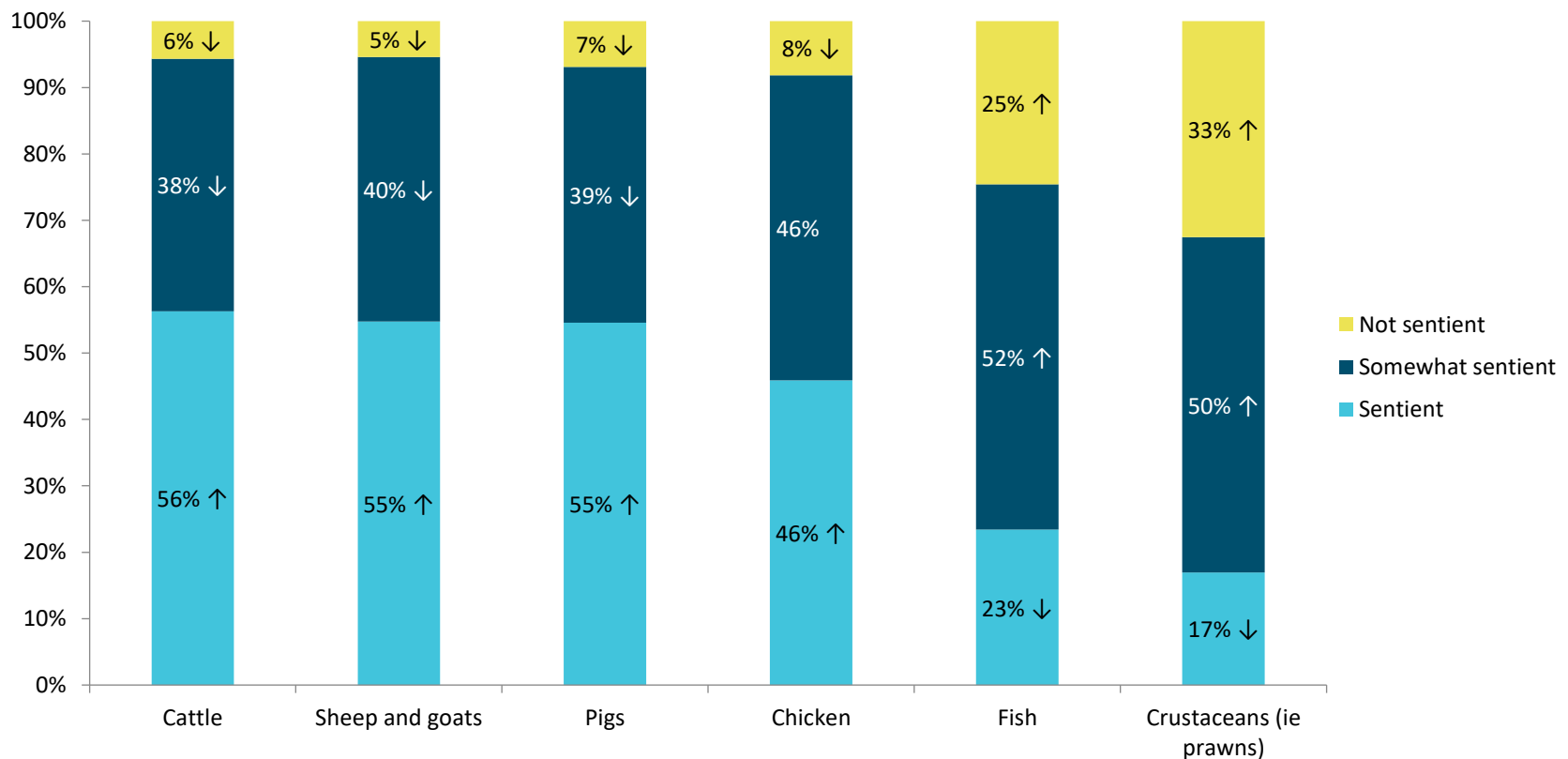
The majority of the public believes they are at least somewhat informed about farm animal welfare

How informed are you about farm animal welfare?



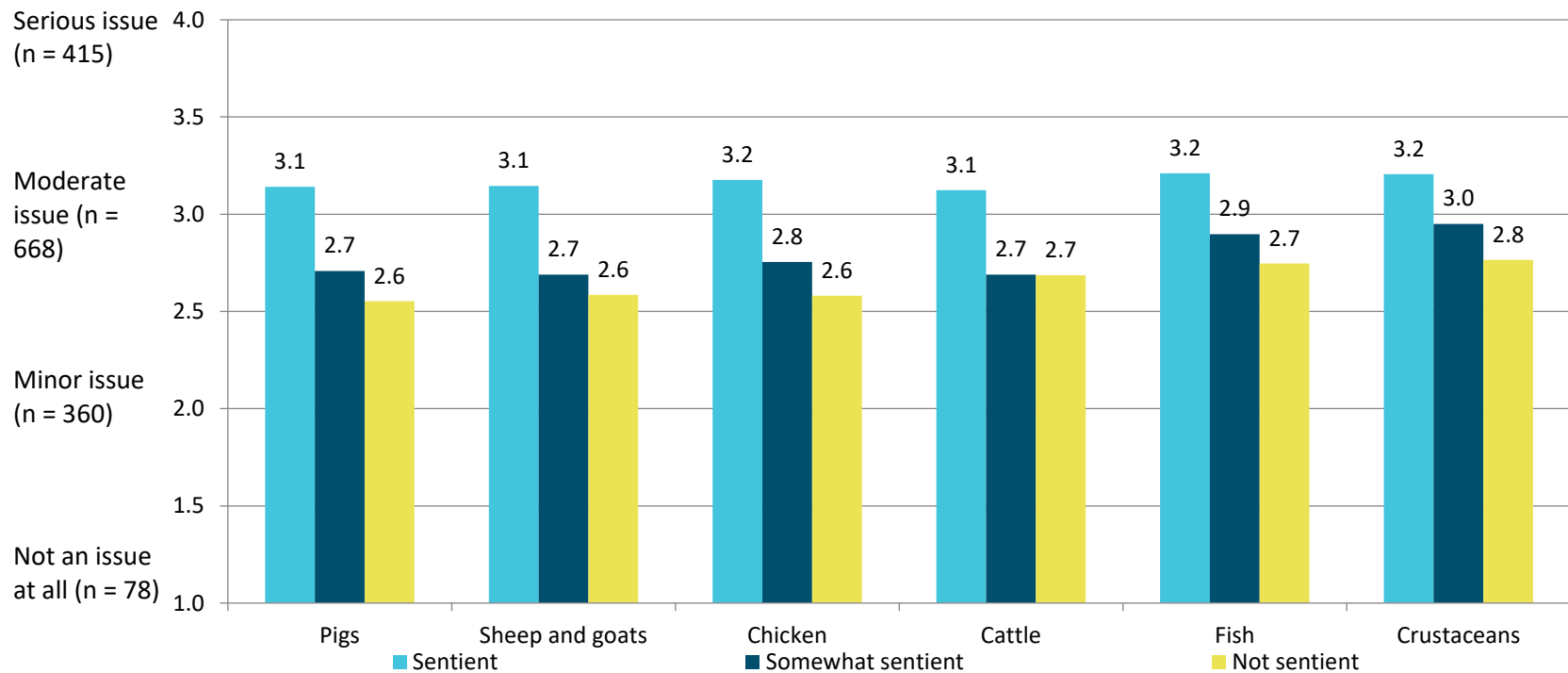
Land animals are identified as the most sentient while fish and crustaceans are seen as the least sentient animals

How sentient do you believe the following farm animals are?



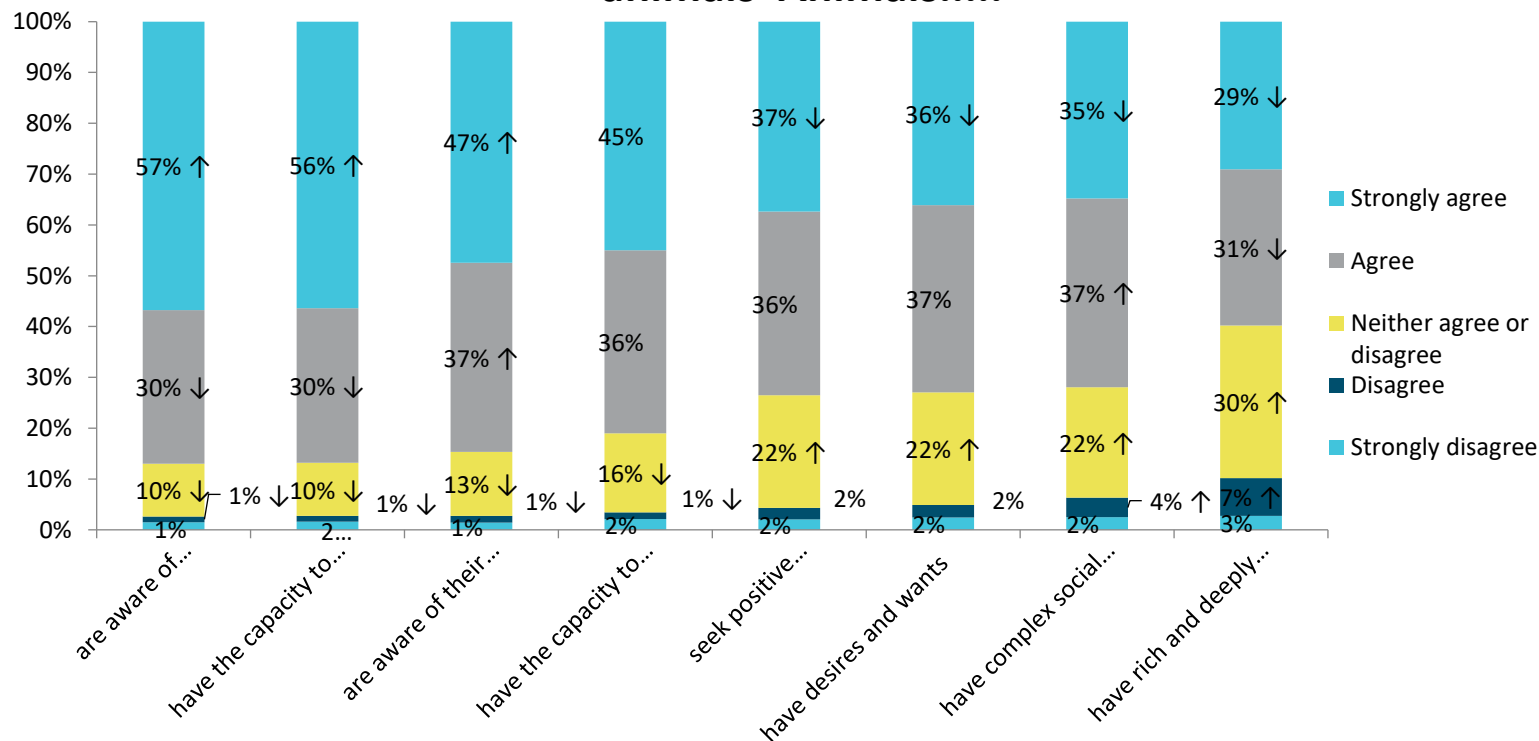
The public that feels farm animal welfare is an issue also views animals as being more sentient

How sentient do you believe the following farm animals are and to what extent do you consider farm animal welfare to be an issue?



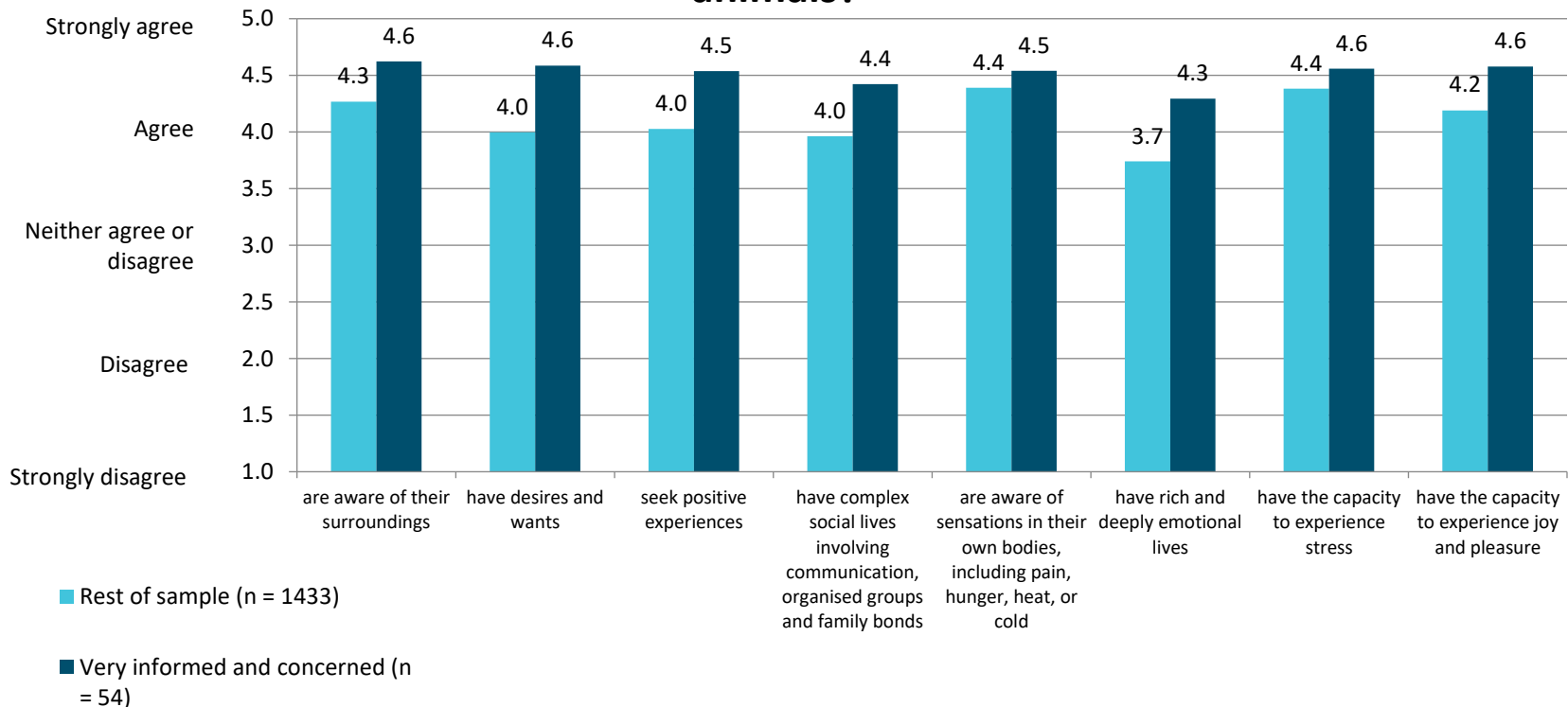
A majority of respondents indicated that they 'strongly agree' or 'agree' that animals have sentient capabilities

How much do you agree with the following statements about animals 'Animals.....'



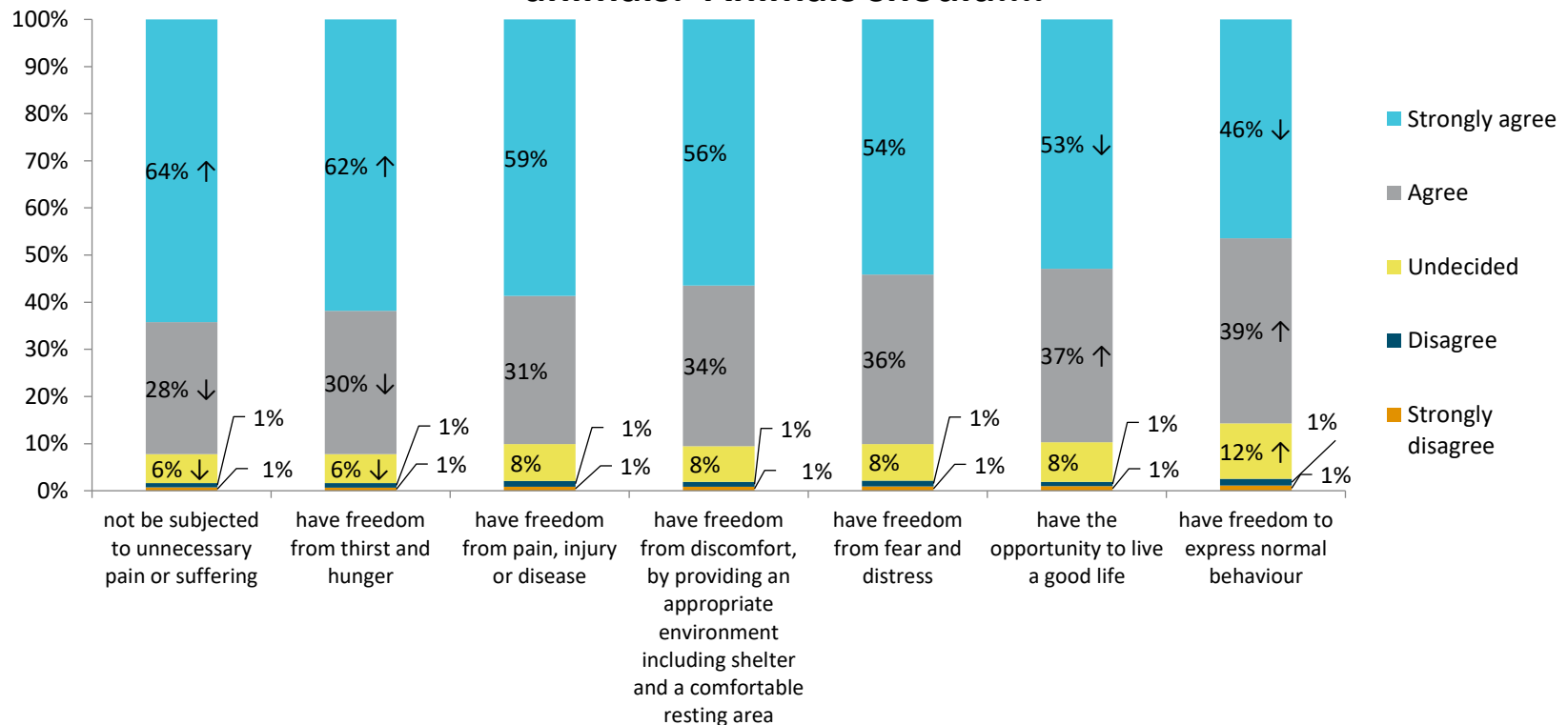
The 'very informed and concerned' segment of the public is more likely to agree with statements about the sentient capabilities of animals

How much do you agree with the following statements about animals?



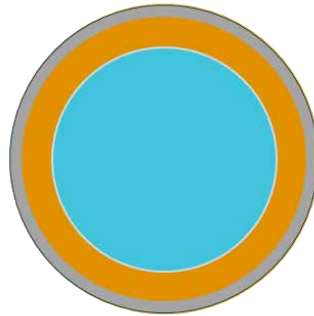
A majority of respondents 'strongly agree' or 'agree' that animals possess rights and freedoms

How much do you agree with the following statements about animals. 'Animals should....'

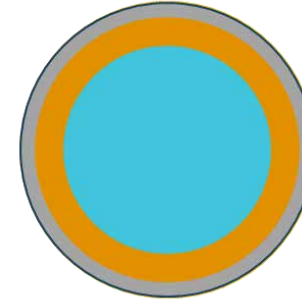


There is a strong alignment to activists' views on how animals should be treated

Animals should not be subjected to unnecessary pain or suffering

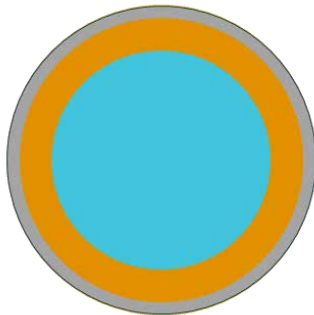


Performing painful procedures without pain relief is unacceptable as it causes significant suffering for the animal

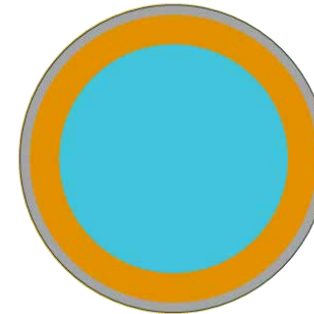


- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

Animals should have freedom from pain, injury or disease

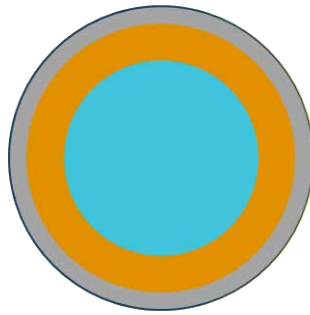


Animals should have freedom from thirst and hunger

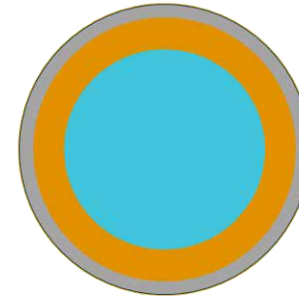


There is a strong agreement that animals should have freedom to express themselves without fear or distress

Animals should have freedom to express normal behaviour

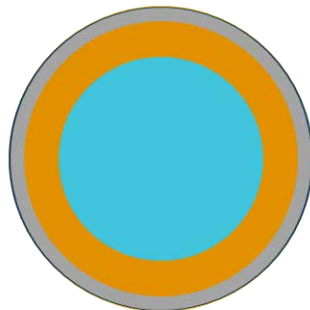


Animals should have freedom from discomfort, by providing an appropriate environment including shelter and a comfortable resting area

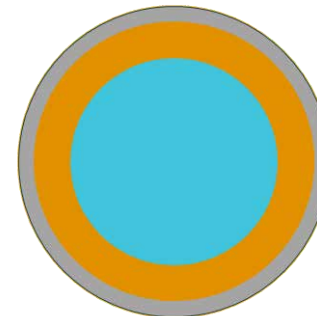


- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

Animals should have freedom from fear and distress

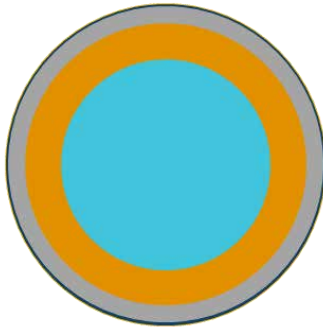


Animals should have the opportunity to live a good life

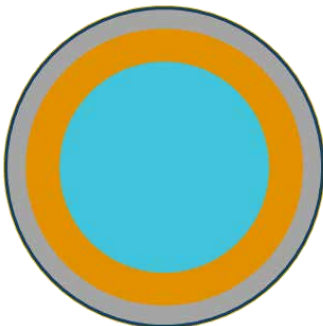


There is agreement that government need to play a bigger role and that transparency needs to be increased

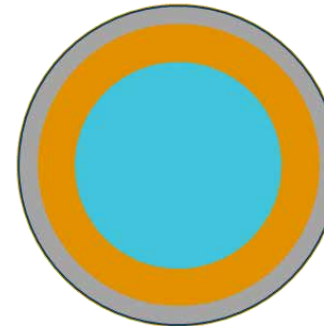
There should be a federal body to oversee the regulation and governance of animal welfare issues



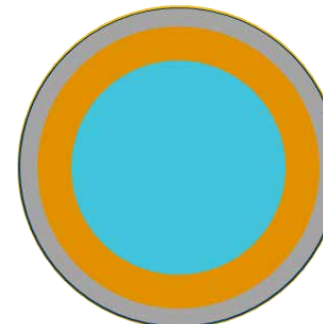
Mandatory and independently monitored CCTV should be installed in slaughterhouses to curb abuse



The government should do more to ensure transparency of agricultural practices



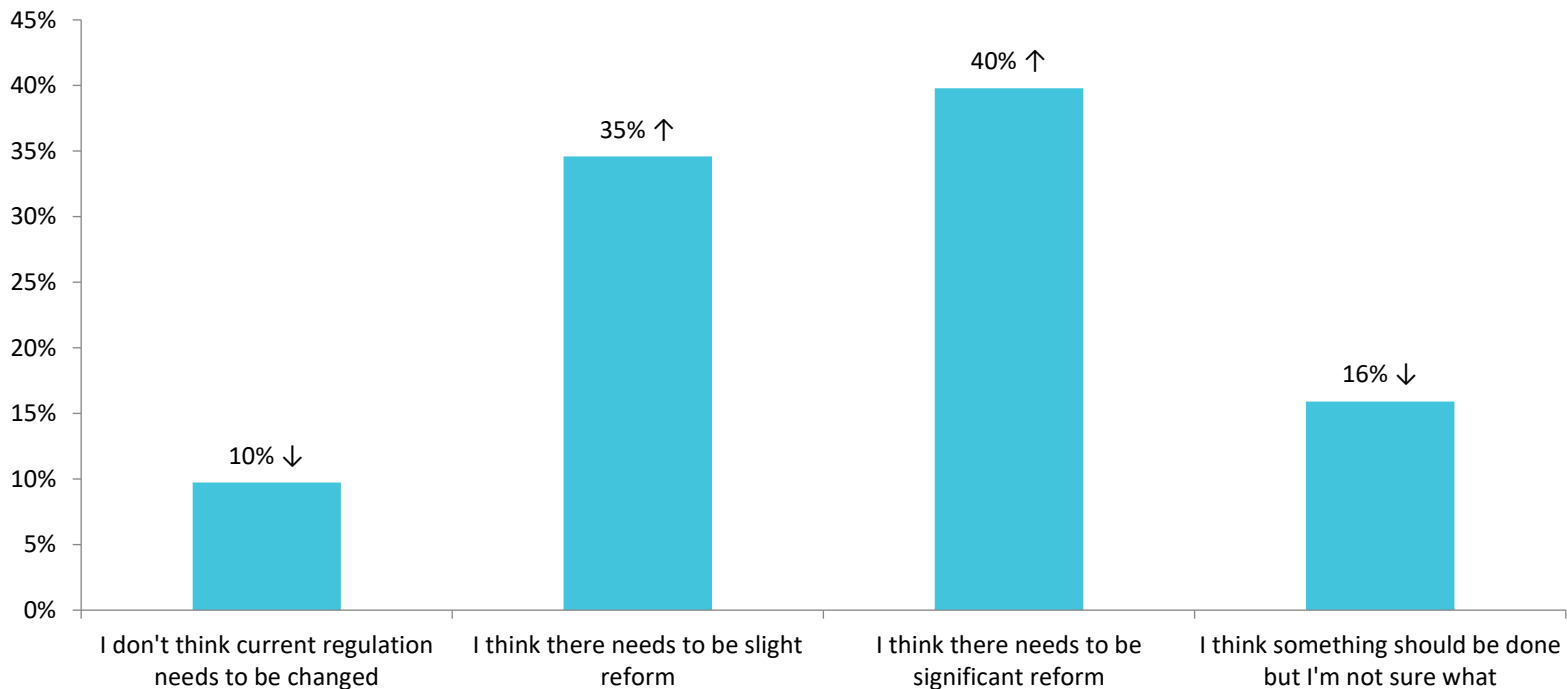
Whistle blowing about animal welfare on farms should be encouraged



- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

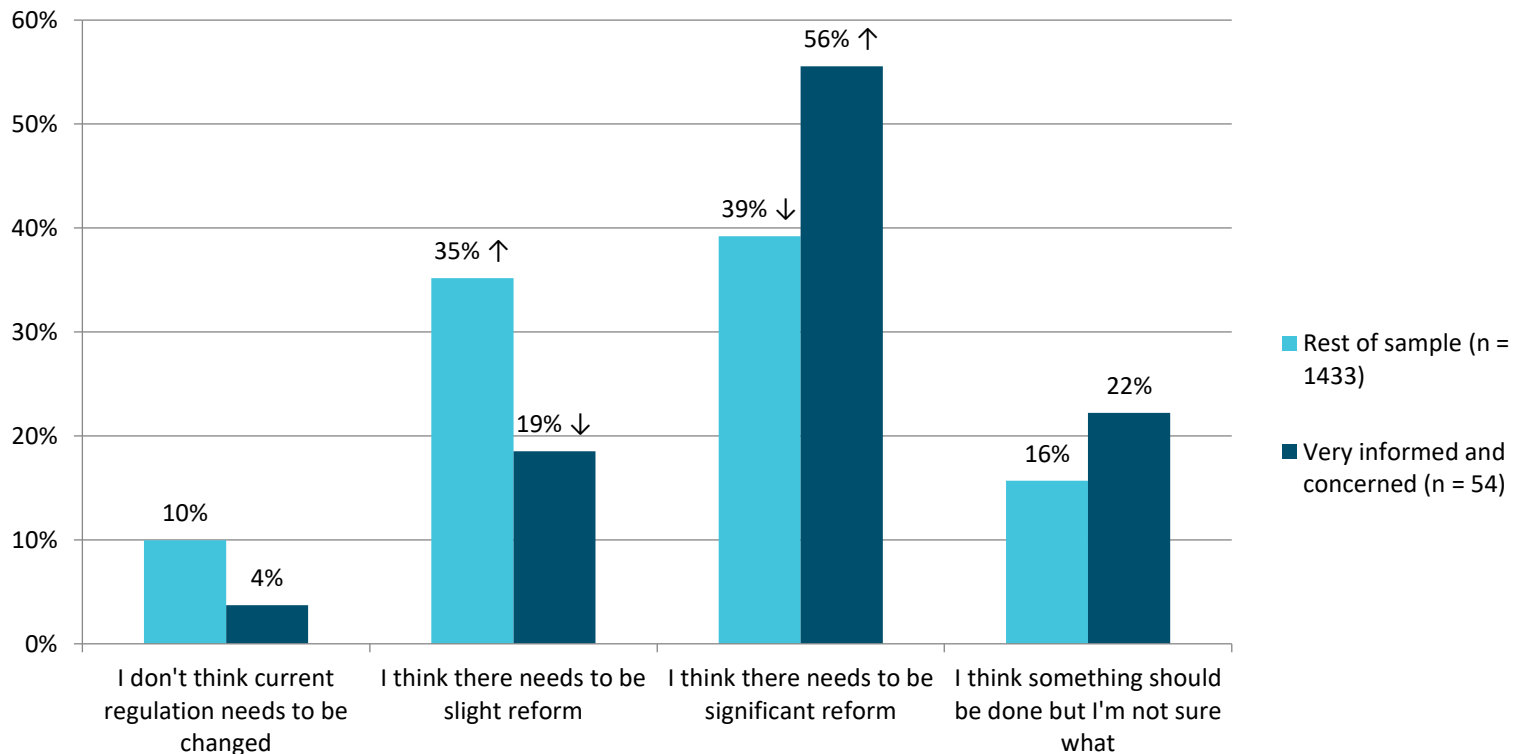
A significant majority believe that some level of regulatory reform is required

Which of the following best describes your view on the action required on animal welfare regulation in agriculture?

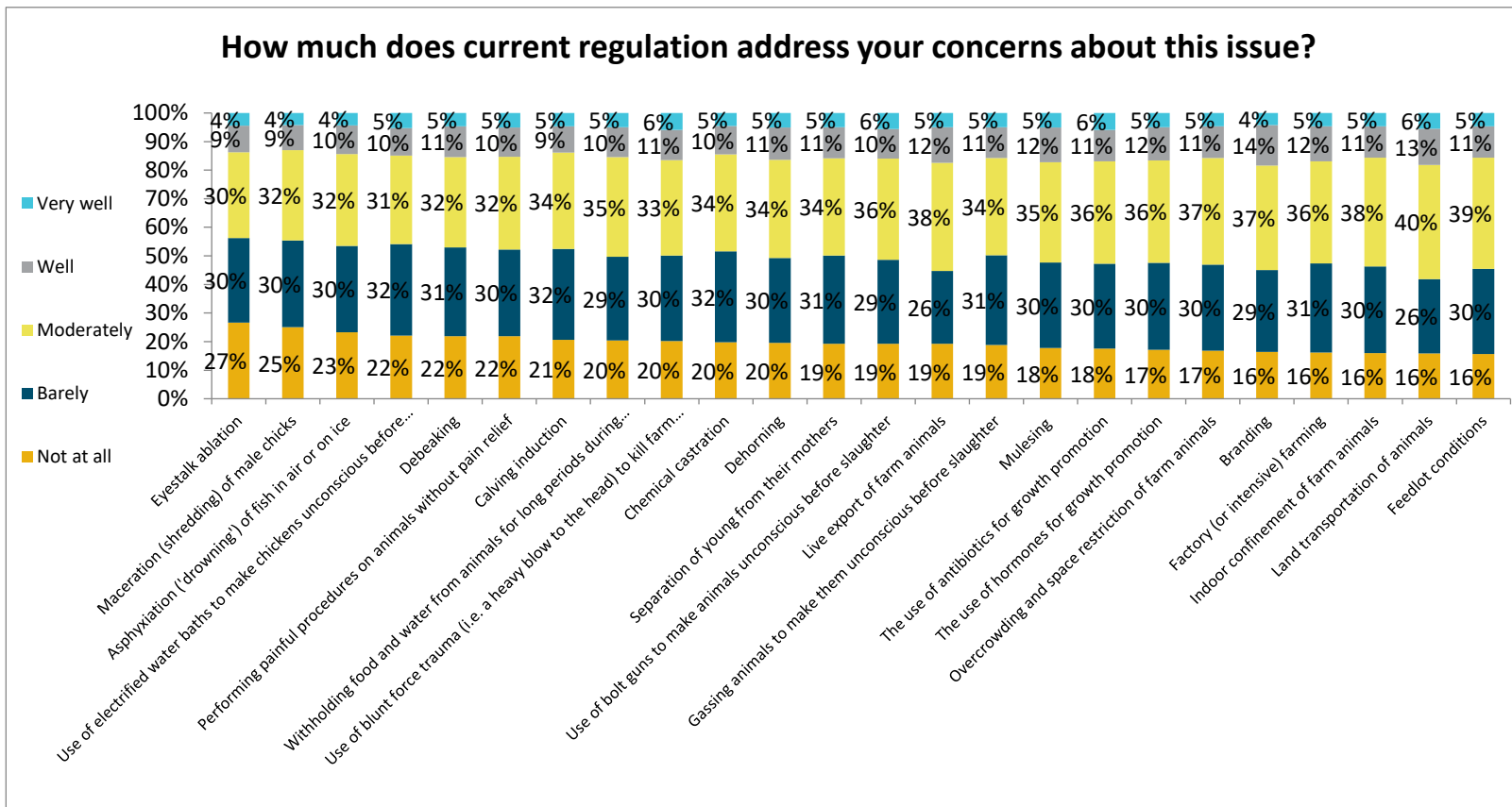


The 'very informed and concerned' segment of the public is more likely to want significant reform

Which of the following best describes your view on the action required on animal welfare regulation in agriculture?

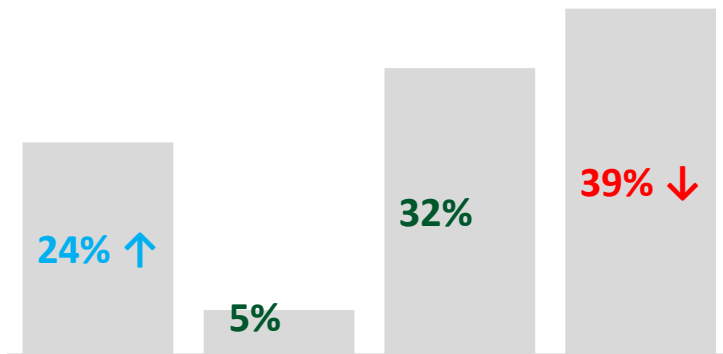


Current regulation on specific agricultural practices insufficiently addresses the public's concerns

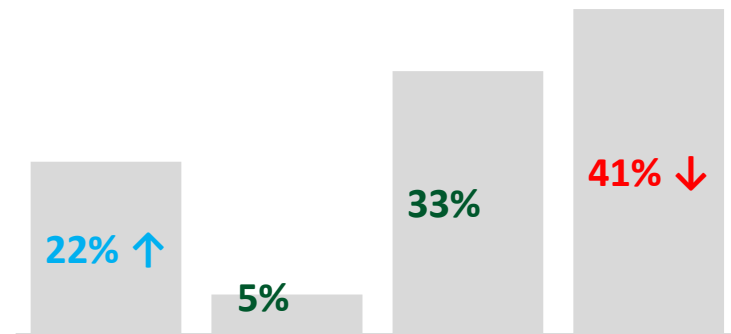


There is a high level of agreement, but also ambivalence on positive statements regarding the federal government's efforts to ensure farm animal welfare

The Australian federal government takes the welfare of all animals, including livestock very seriously



The Australian federal government understands and shares the concerns of the community about the welfare of animals

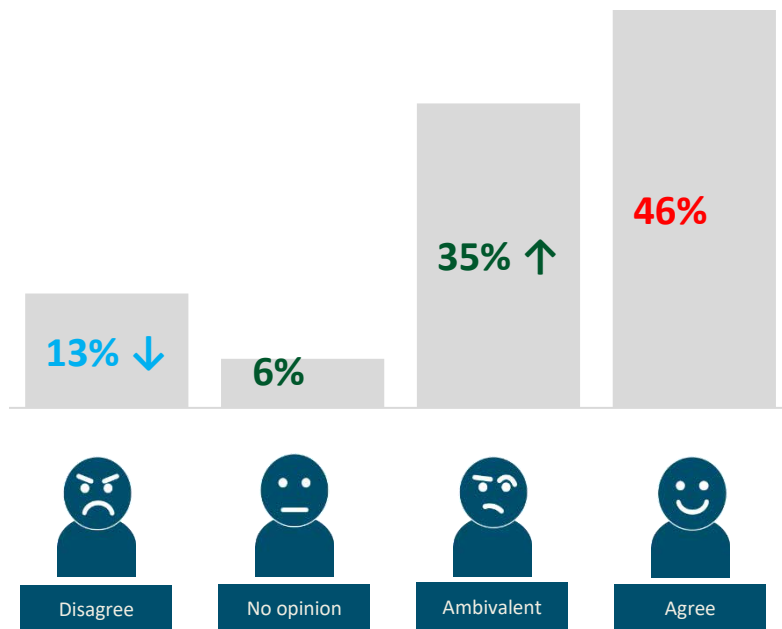


Disagree	No opinion	Ambivalent	Agree
The more you try and convince me I'm wrong, the more I believe I'm right.	I don't have views about either side.	I know about both sides of the argument but haven't made up my mind.	Yes, I agree with you!

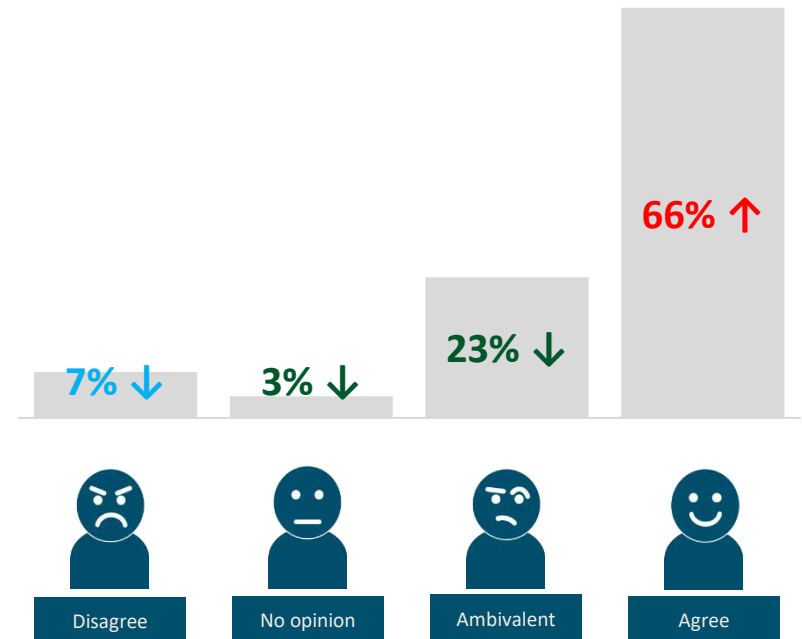
Disagree	No opinion	Ambivalent	Agree

There is a high level of agreement that farmers care about their animals and that the federal government is working with the industry

The Australian federal government is working with the Australian livestock industry to improve animal welfare

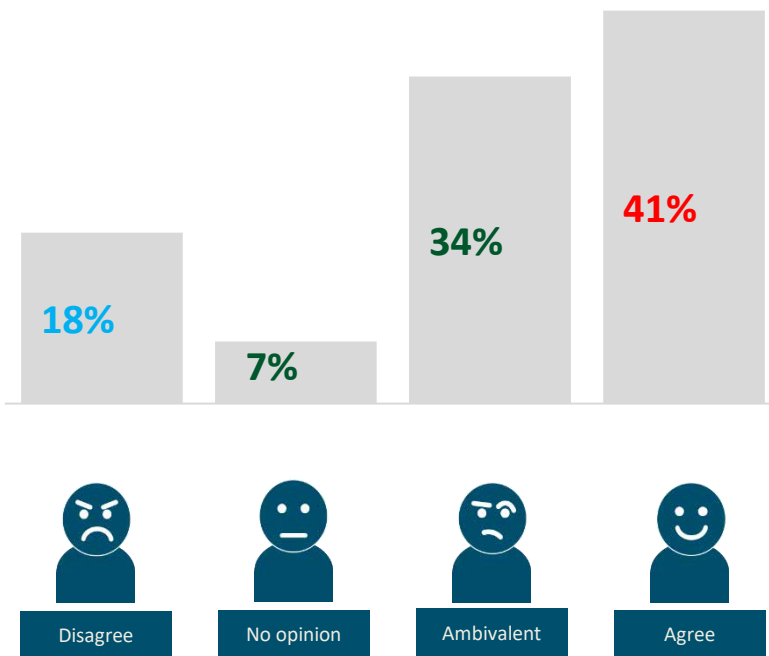


Farmers care about animal welfare

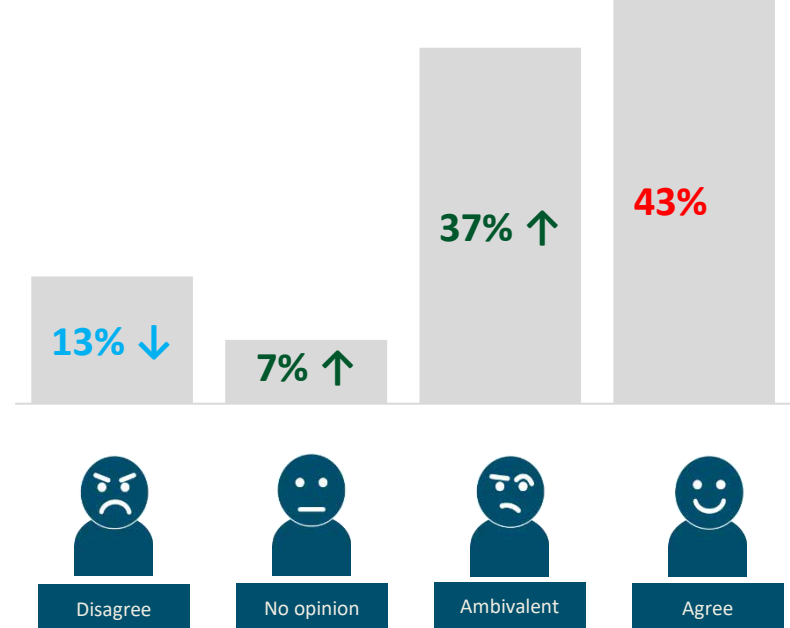


There is high level of agreement but also ambivalence on the statements that states and territories should remain responsible

Animal welfare on farms should remain the responsibility of state and territory governments, rather than the Australian federal government

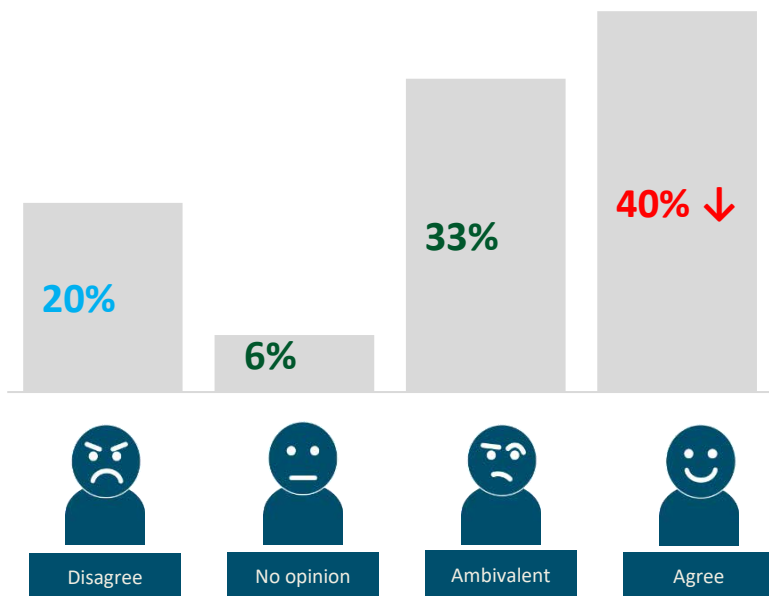


The animal welfare arrangements under state and territory government legislation will continue to achieve positive animal welfare outcomes

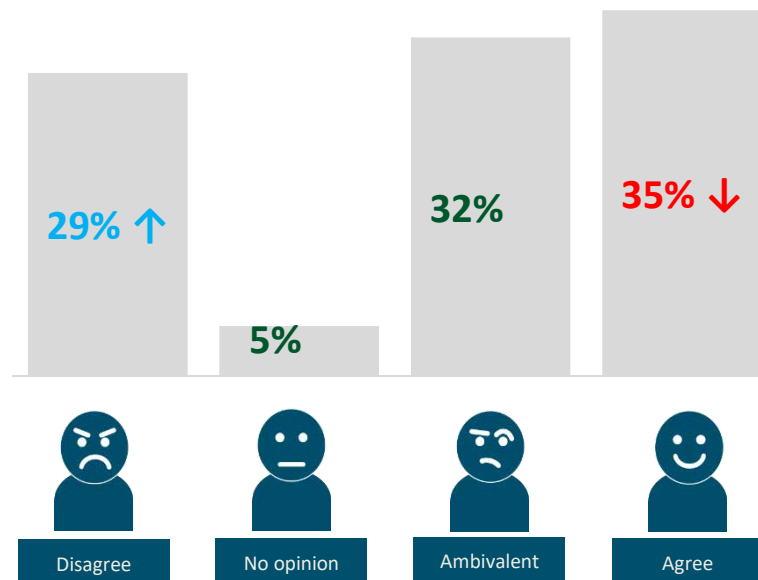


There is a high level of agreement, but also ambivalence on positive statements regarding the federal government's efforts to ensure farm animal welfare

The Australian federal government ensures that livestock welfare regulation is both practical for the industry and results in improved welfare outcomes

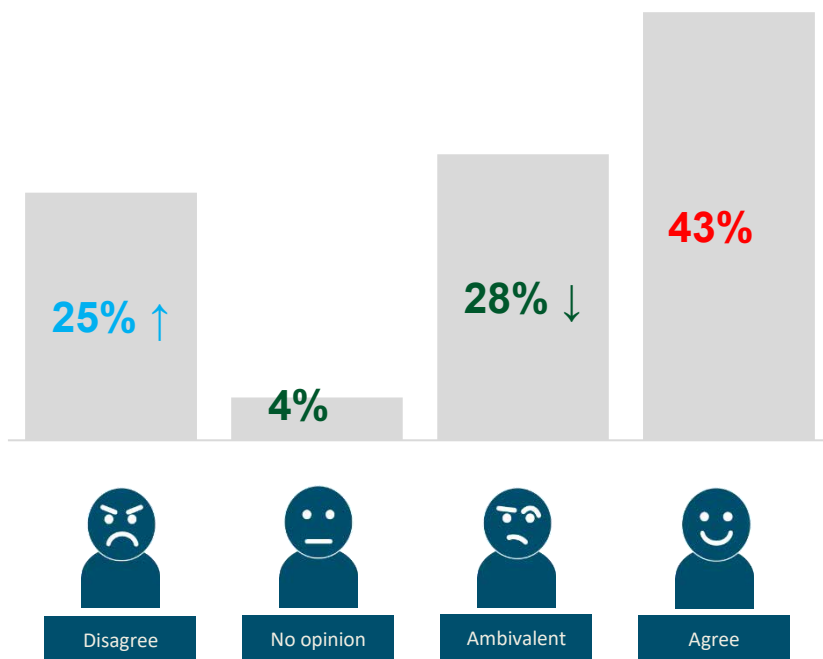


The Australian federal government is effective in enforcing animal welfare standards



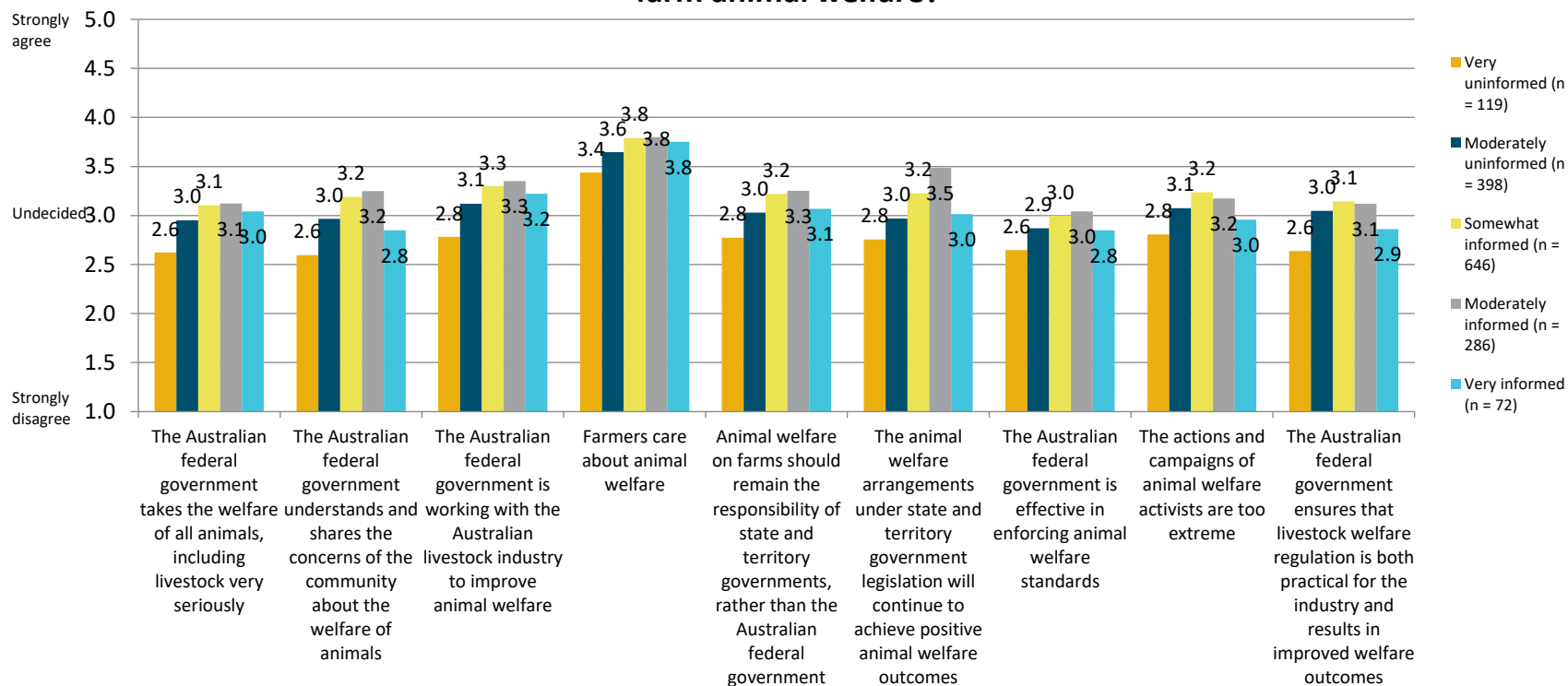
While there is a high level of agreement that activists campaign are too extreme, this statement has one of the highest levels of disagreement of all positive statements

The actions and campaigns of animal welfare activists are too extreme



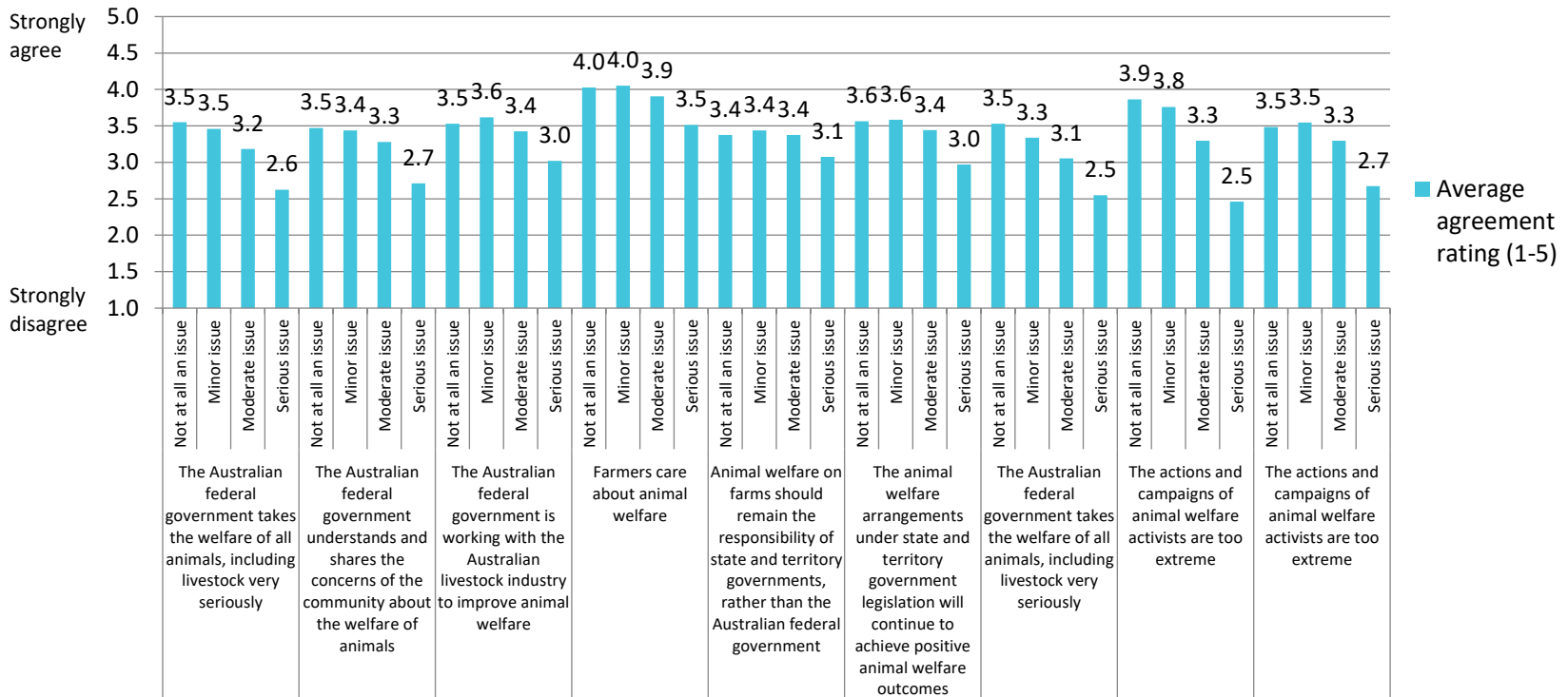
The more informed the public is the more likely they are to agree with positive statements. However among the 'very informed' public opinions are polarised.

How much do you agree with the following statements? How informed are you about farm animal welfare?



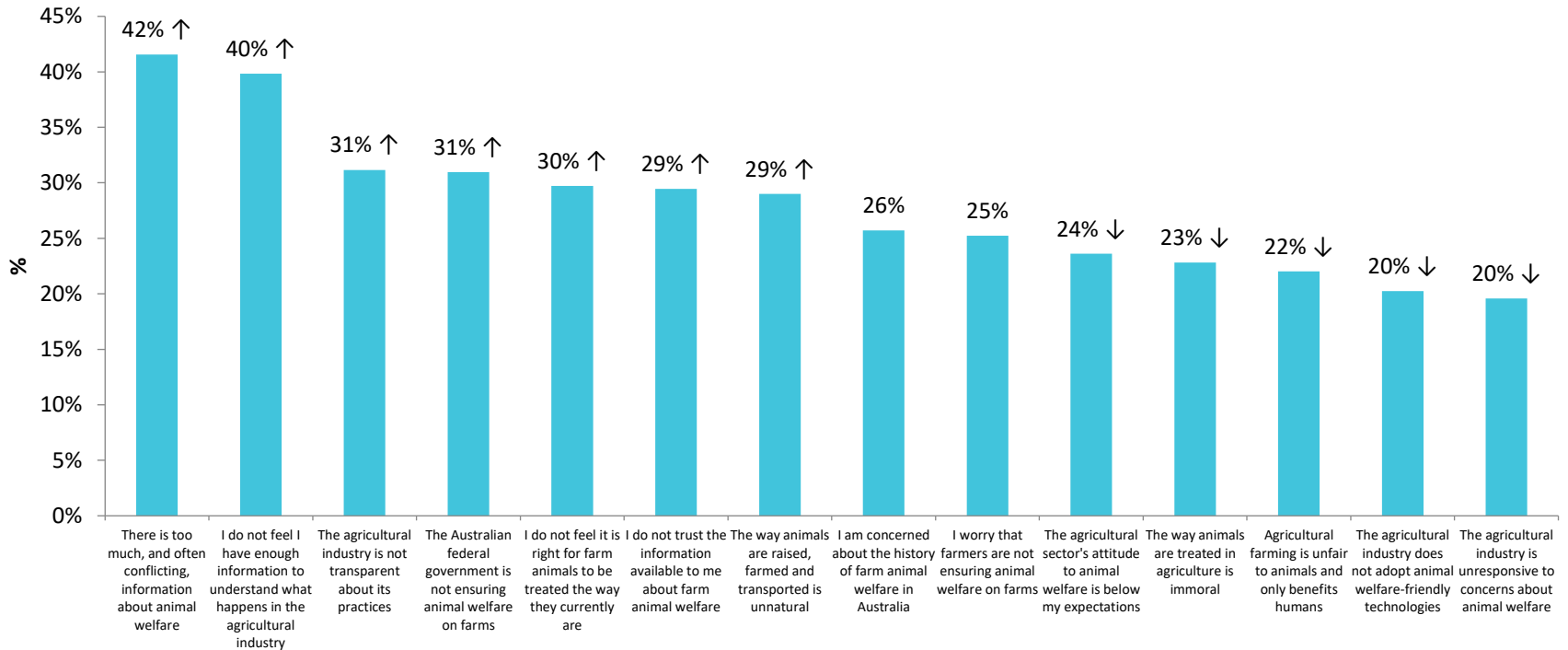
The more concerned the public is about farm animal welfare, the more likely they are to disagree with these positive statements

Average agreement rating (1-5)



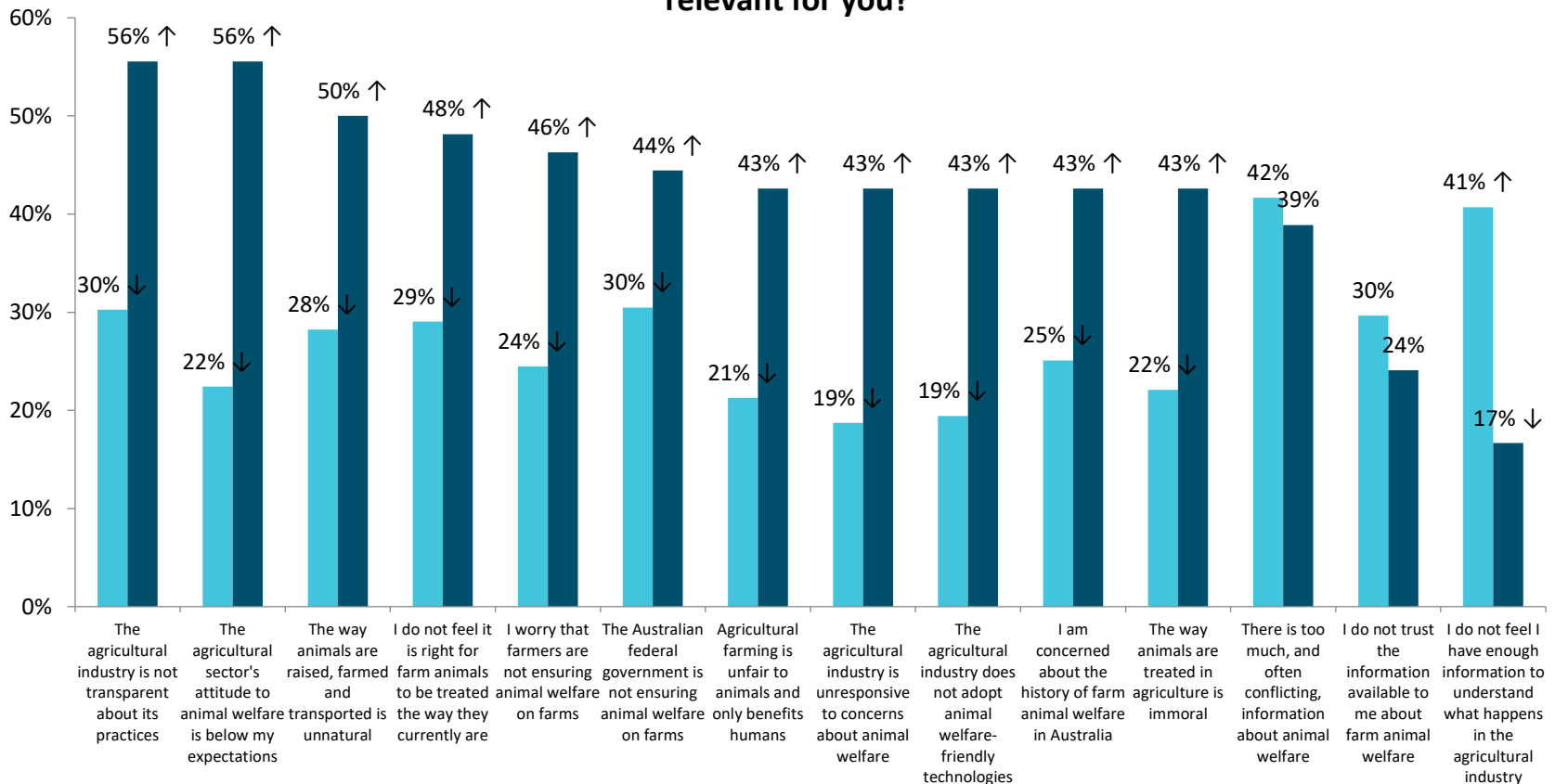
The public feels that there is insufficient information about farm animal welfare and that regulation is not ensuring the expected level standards

When forming your view of farm animal welfare, which of the following statements are relevant for you?

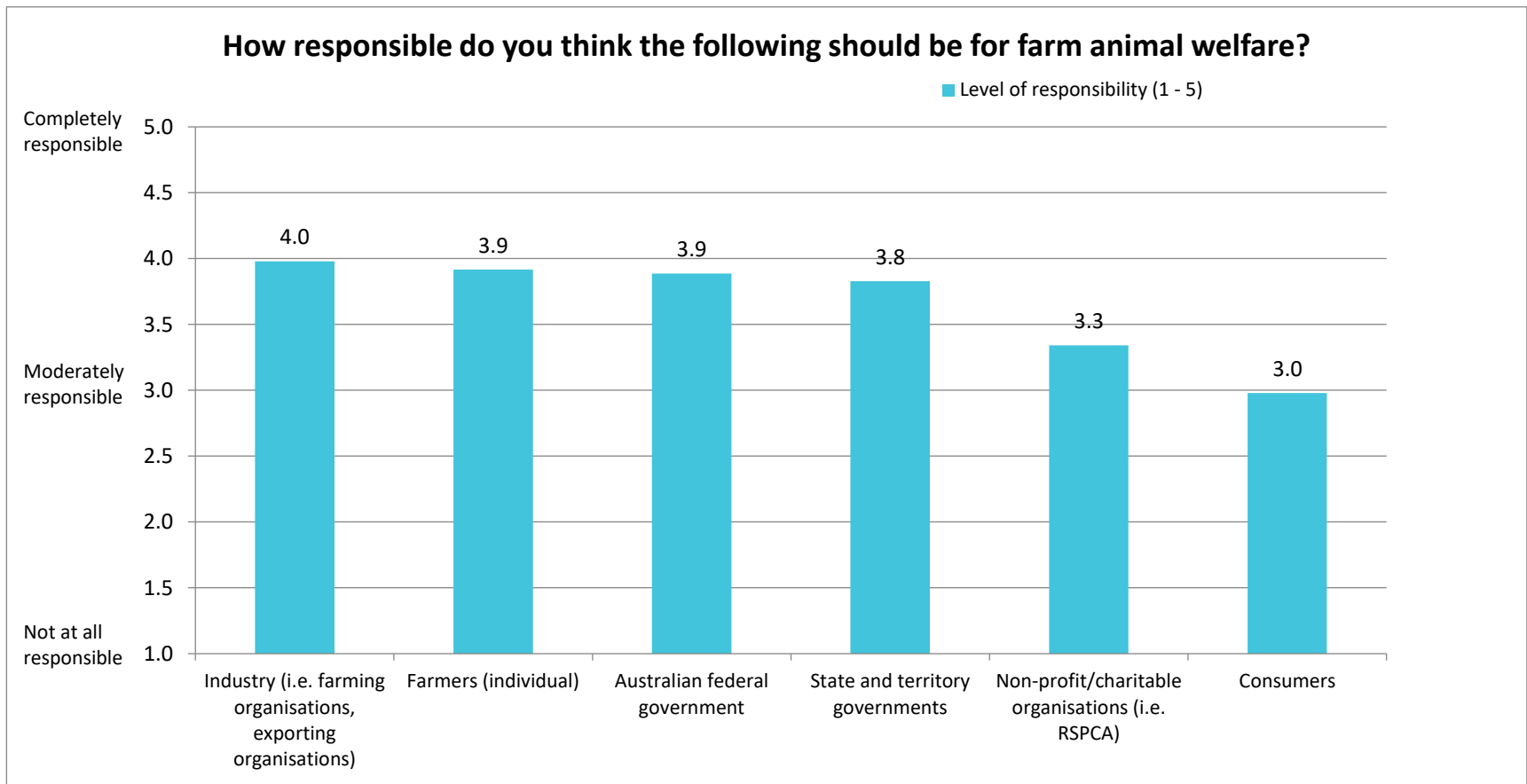


The public that is very informed and concerned about animal welfare is more likely to believe the industry is not transparent or trustworthy

When forming your view of farm animal welfare, which of the following statements are relevant for you?

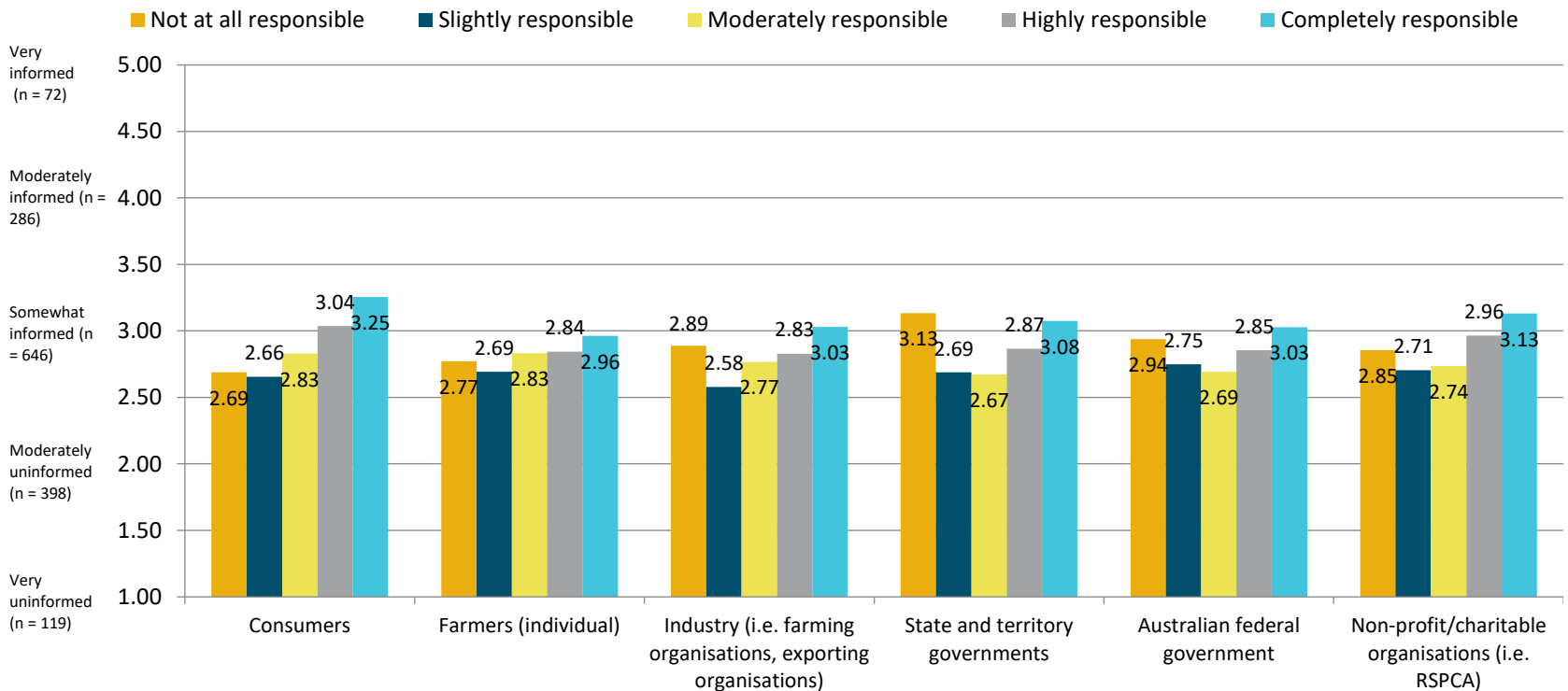


Federal government is seen as the most responsible level of government for farm animal welfare, closely tailing industry



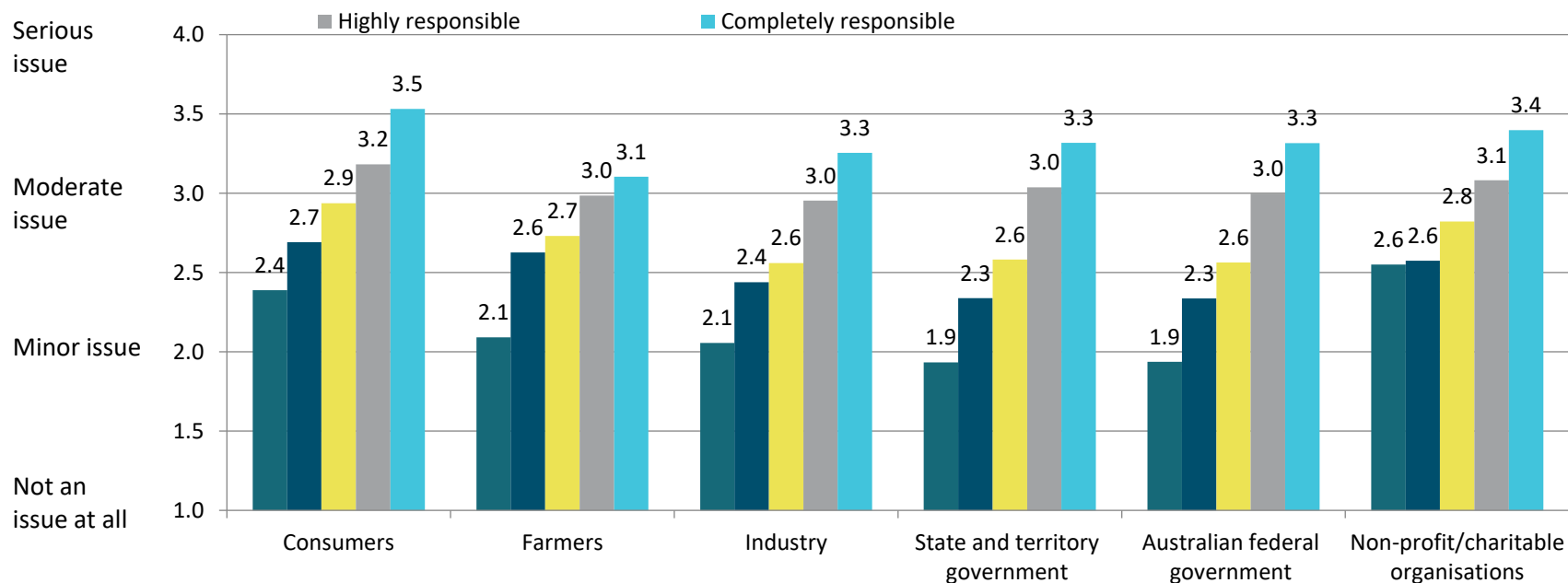
The more informed the public is about farm animal welfare, the more responsibility they attribute to the different actors

How informed are you about farm animal welfare? How responsible do you think the following should be for farm animal welfare?



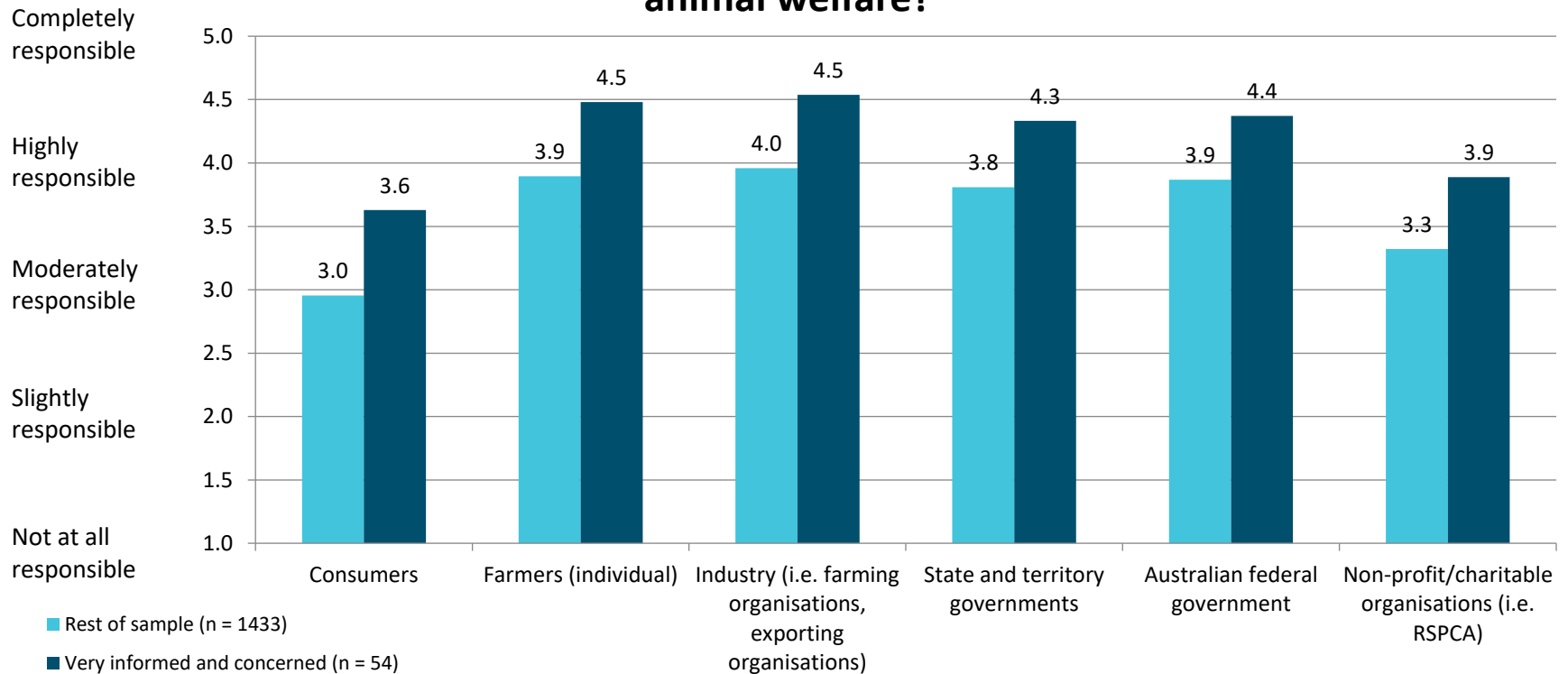
The more serious an issue the public believes farm animal welfare to be, the more responsibility they attribute to different actors

'To what extent do you consider farm animal welfare to be an issue? and How responsible do you think the following should be for farm animal welfare?'



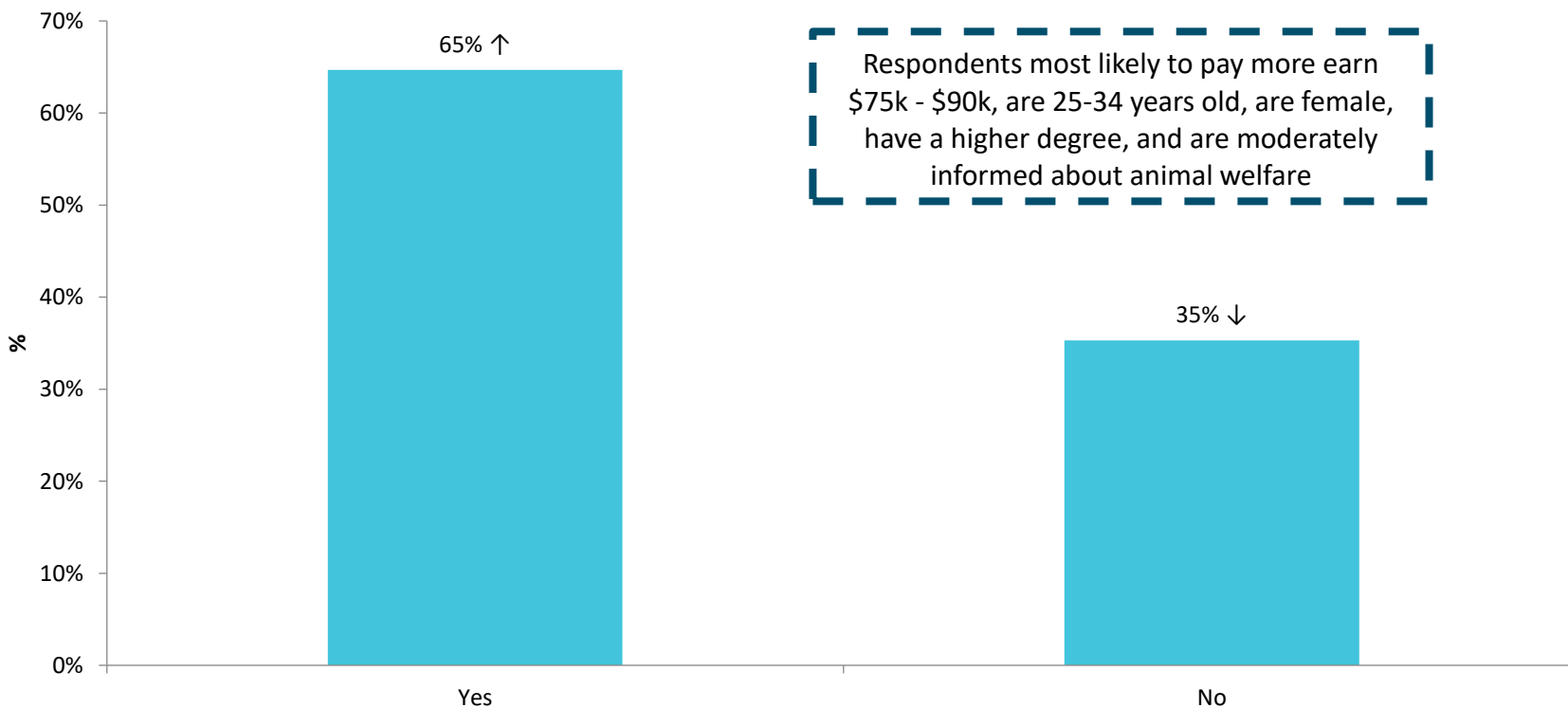
The 'very informed and concerned' segment of the public overall attributes higher responsibility to all parties

How responsible do you think the following should be for farm animal welfare?



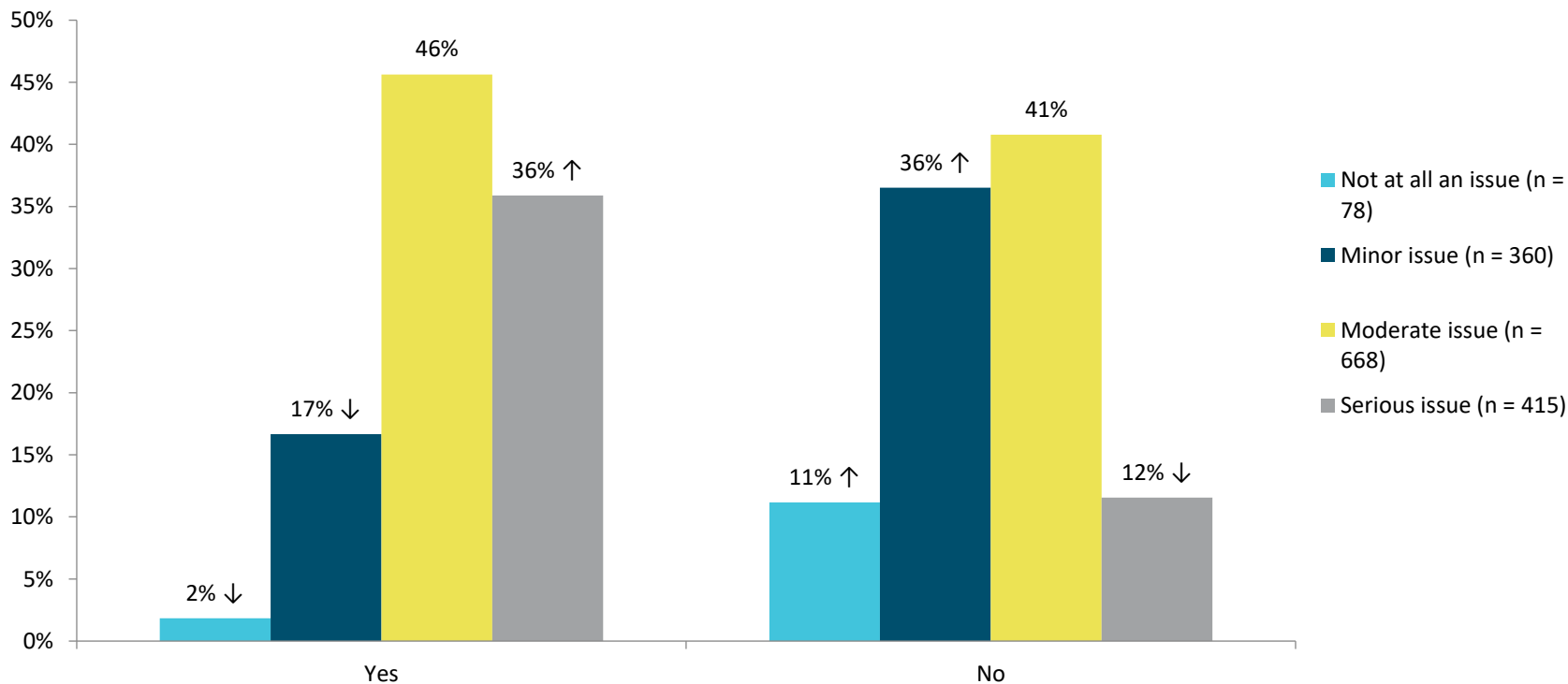
The majority of respondents are willing to pay to ensure better conditions and welfare for farmed animals

Would you be willing to pay to ensure better conditions and welfare for farmed animals?



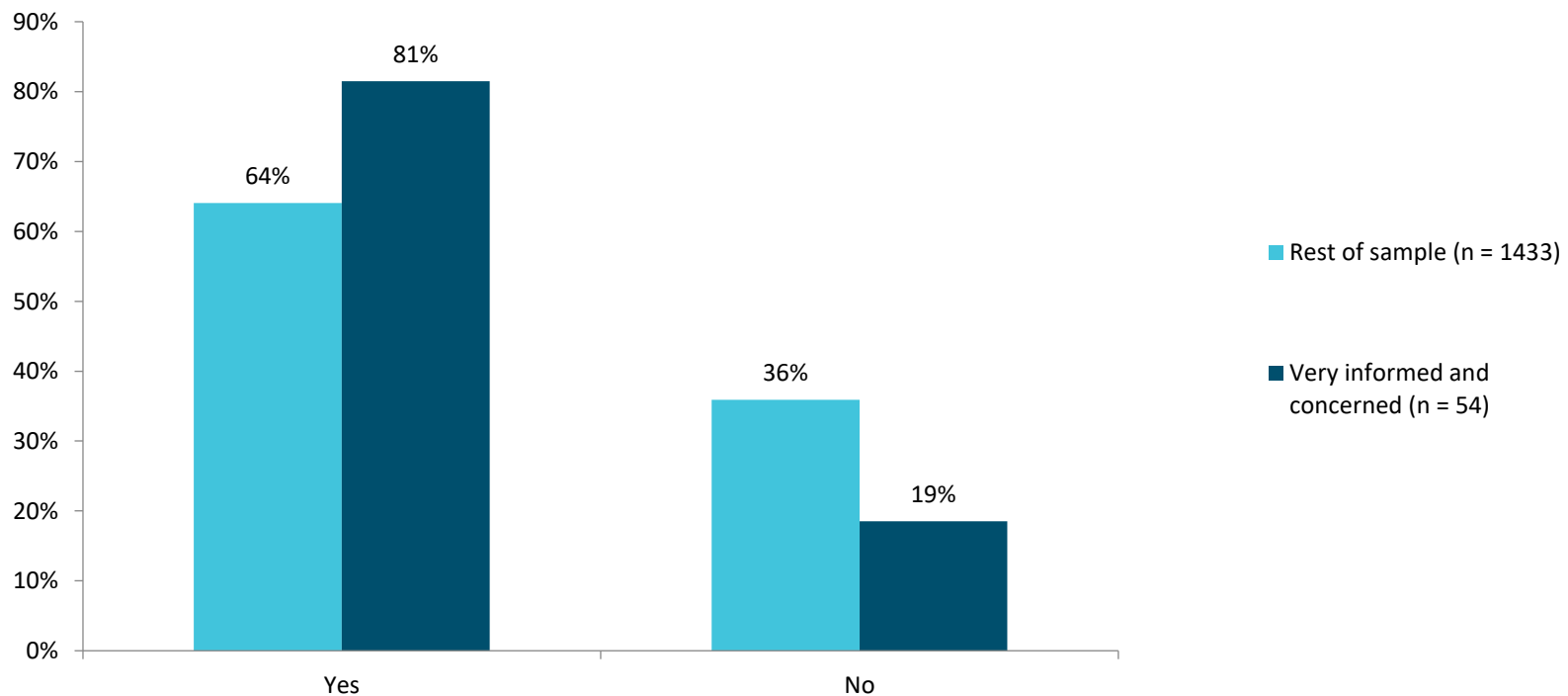
The public that considers farm animal welfare to be an issue is more likely to pay more for products that ensure higher standards

To what extent do you consider farm animal welfare to be an issue? Would you be willing to pay to ensure better conditions and welfare for farmed animals?



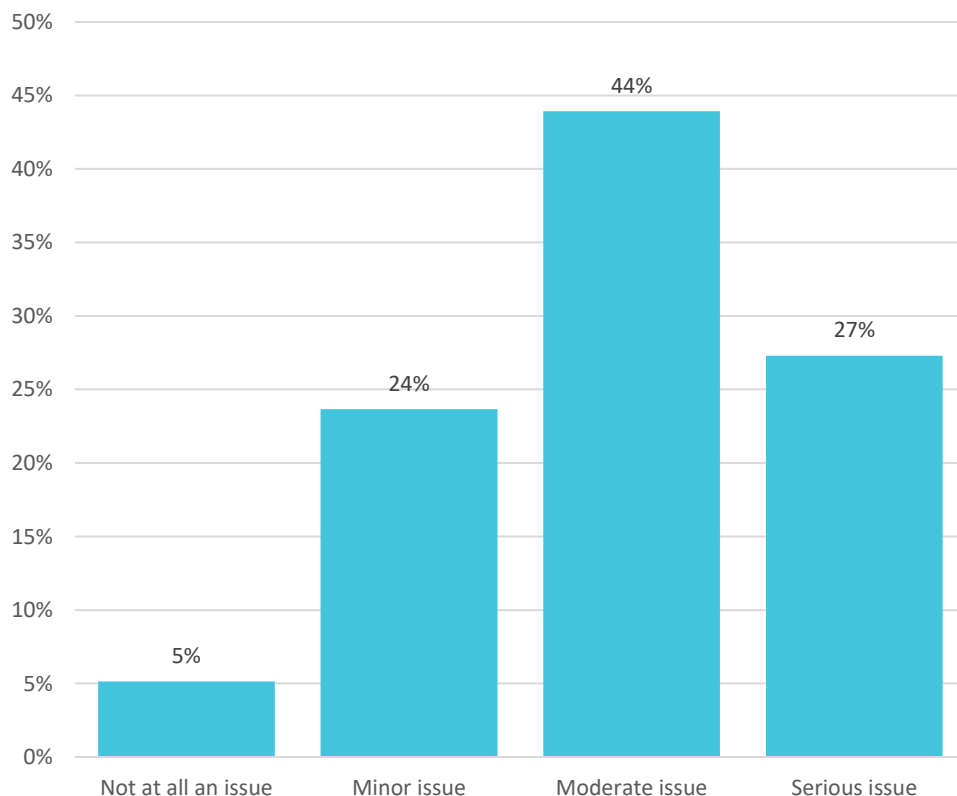
The 'very informed and concerned' segment of the public is more willing to pay to ensure better conditions and farm animal welfare than the rest of the public

Would you be willing to pay to ensure better conditions and welfare for farmed animals?



An overwhelming majority of the public is concerned about animal welfare to some degree

To what extent do you consider farm animal welfare to be an issue?



Those who consume meat and red meat have the lowest frequency of indicating that farm animal welfare is a serious issue. In contrast of those who do not consume any animal products 54% believe farm animal welfare is a serious issue.

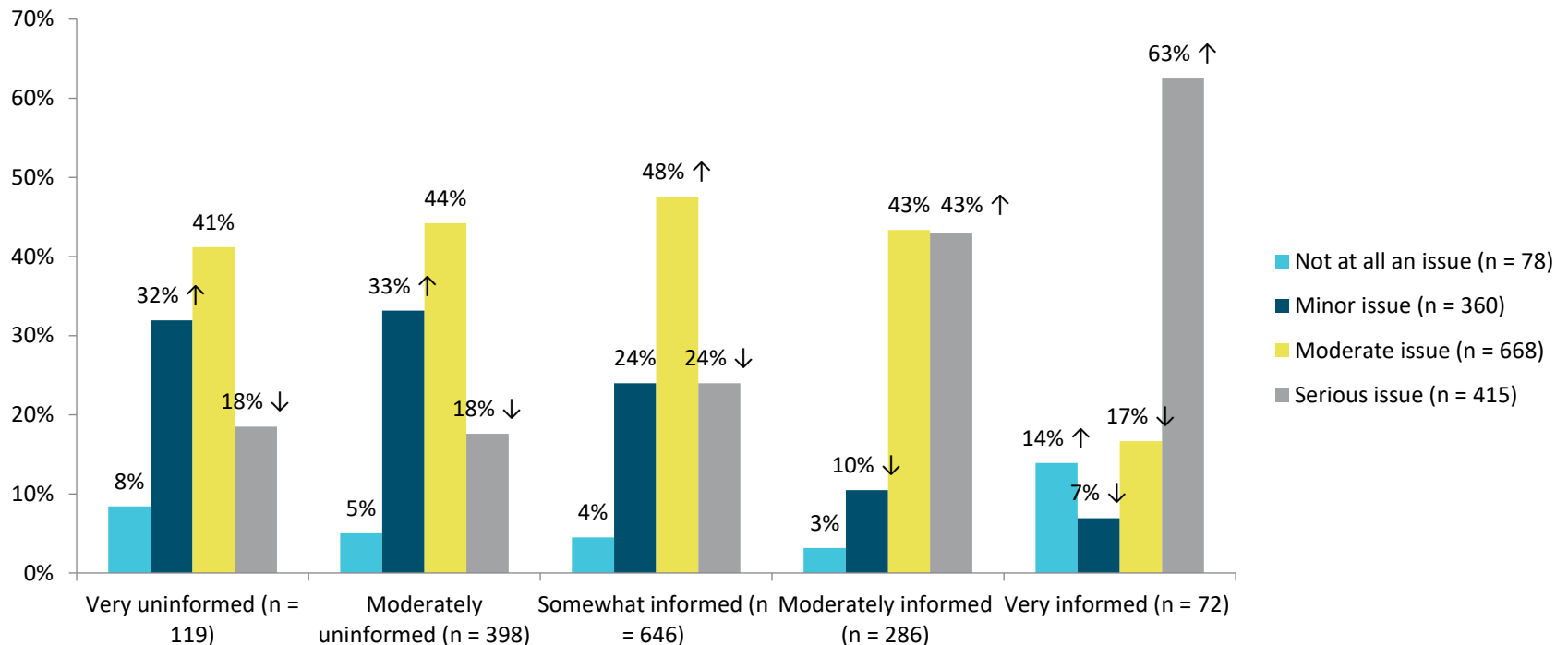
The very uninformed are most likely not to consider farm animal welfare an issue, whereas the very informed are the most likely to believe there is an issue.

The average age of those who believe there is no issue is 51 years, and the average of those who believe it is a serious issue is 45 years. There is a clear trend of declining age with increasing concern for farm animal welfare.

Females are generally more concerned about animal welfare conditions on farms than their male counterparts.

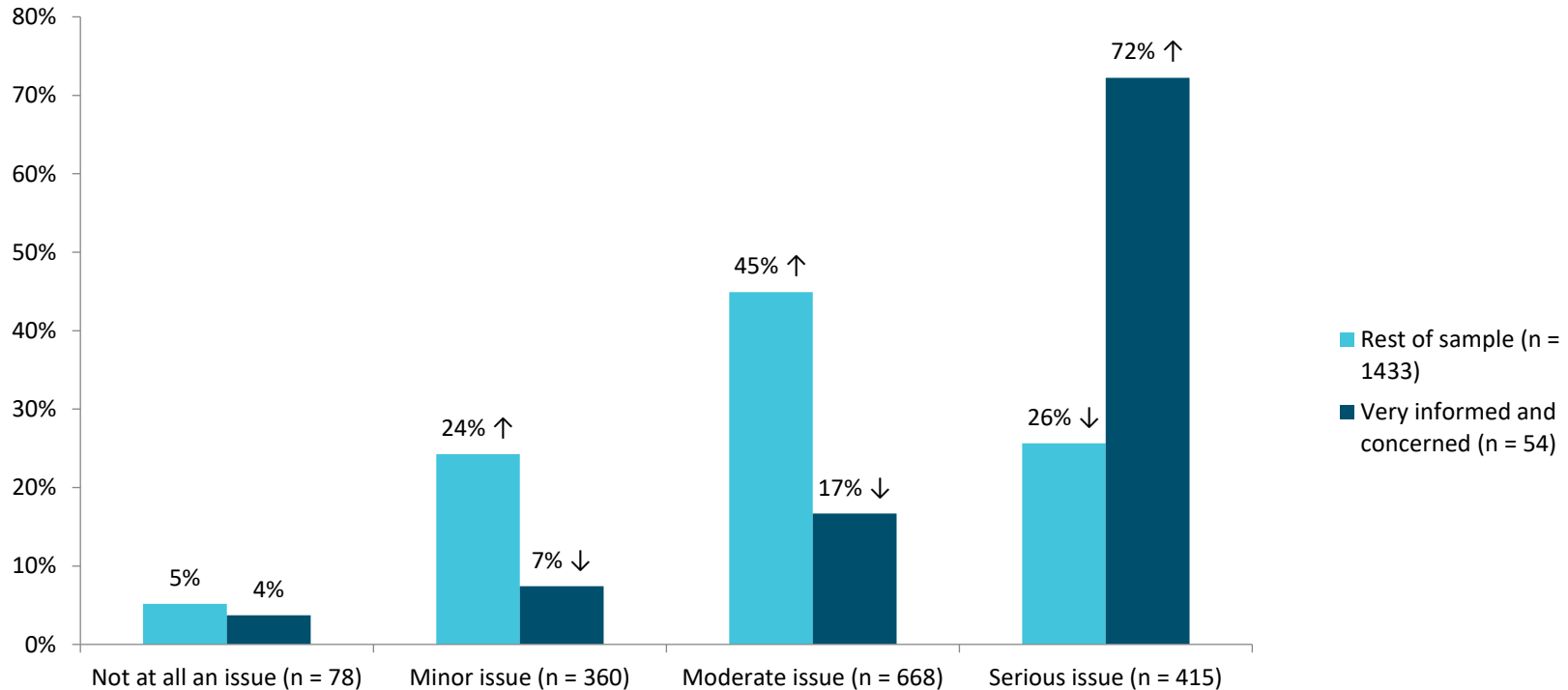
The public more informed about farm animal welfare, regards it as a more serious issue

How informed are you about farm animal welfare and to what extent do you consider farm animal welfare to be an issue?



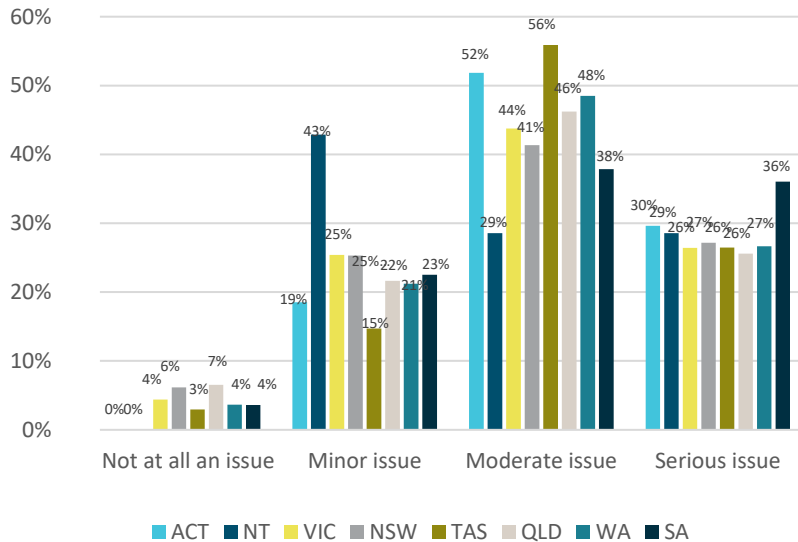
The 'very informed and concerned' segment of the public is significantly more likely to consider farm animal welfare to be a serious issue

To what extent do you consider farm animal welfare to be an issue?

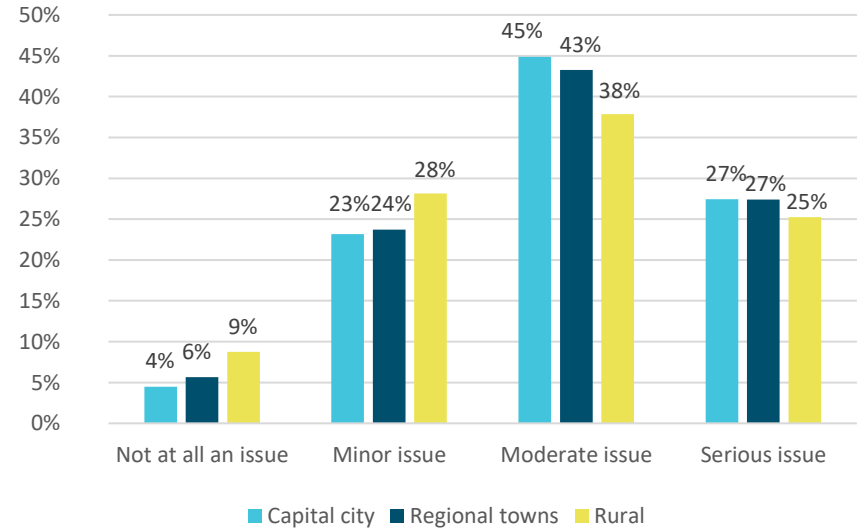


Concern about farm animal welfare is relatively evenly spread across states and territories as well as metropolitan and regional areas

To what extent do you consider farm animal welfare to be an issue?

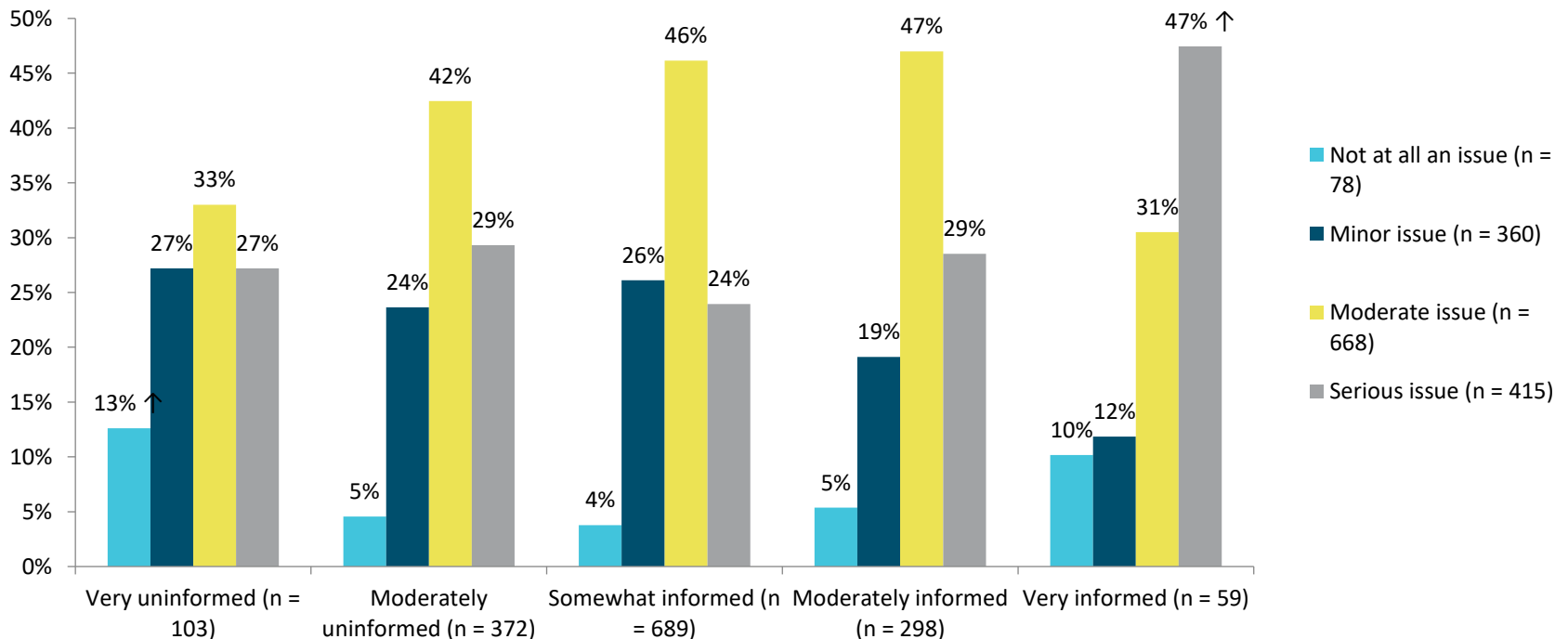


To what extent do you consider farm animal welfare to be an issue?



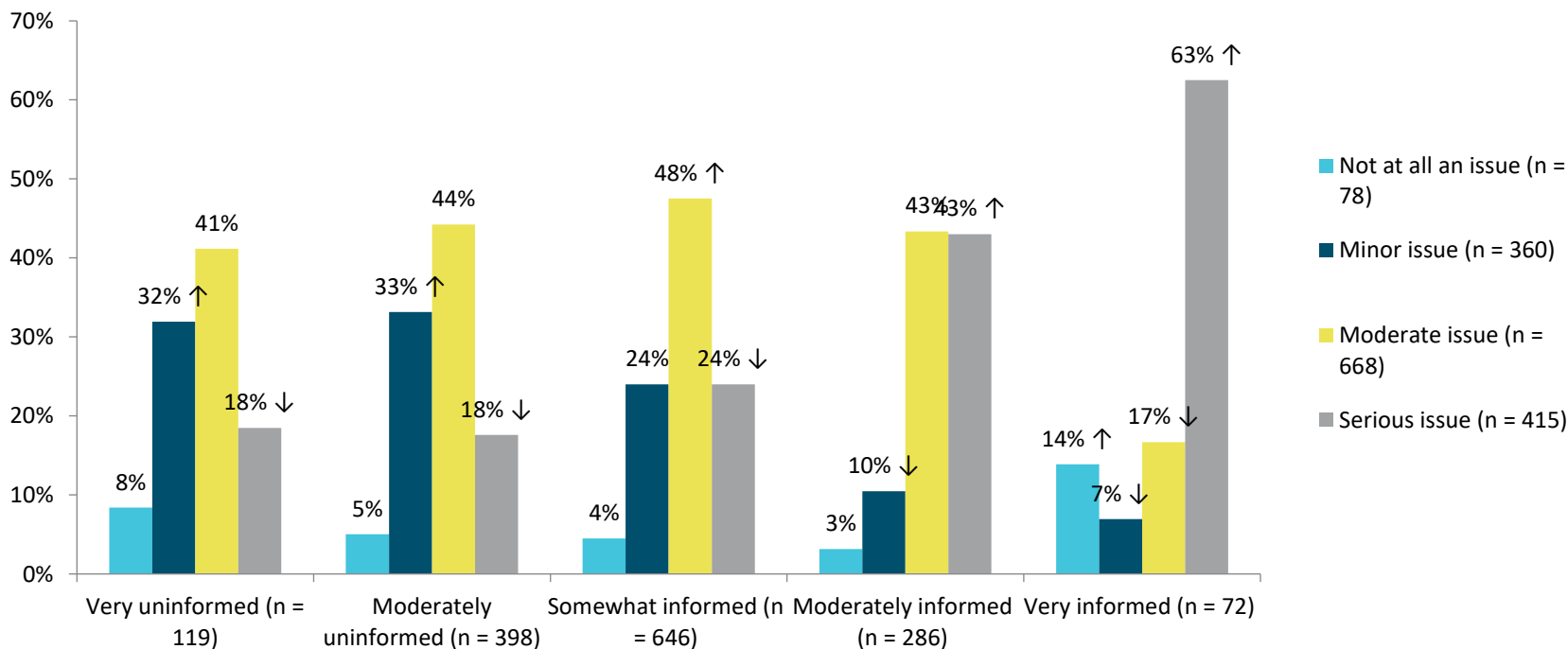
There is a correlation between knowledge about agriculture, and the degree to which animal welfare is seen as an issue

How much do you know about agriculture in Australia and to what extent do you consider farm animal welfare to be an issue?



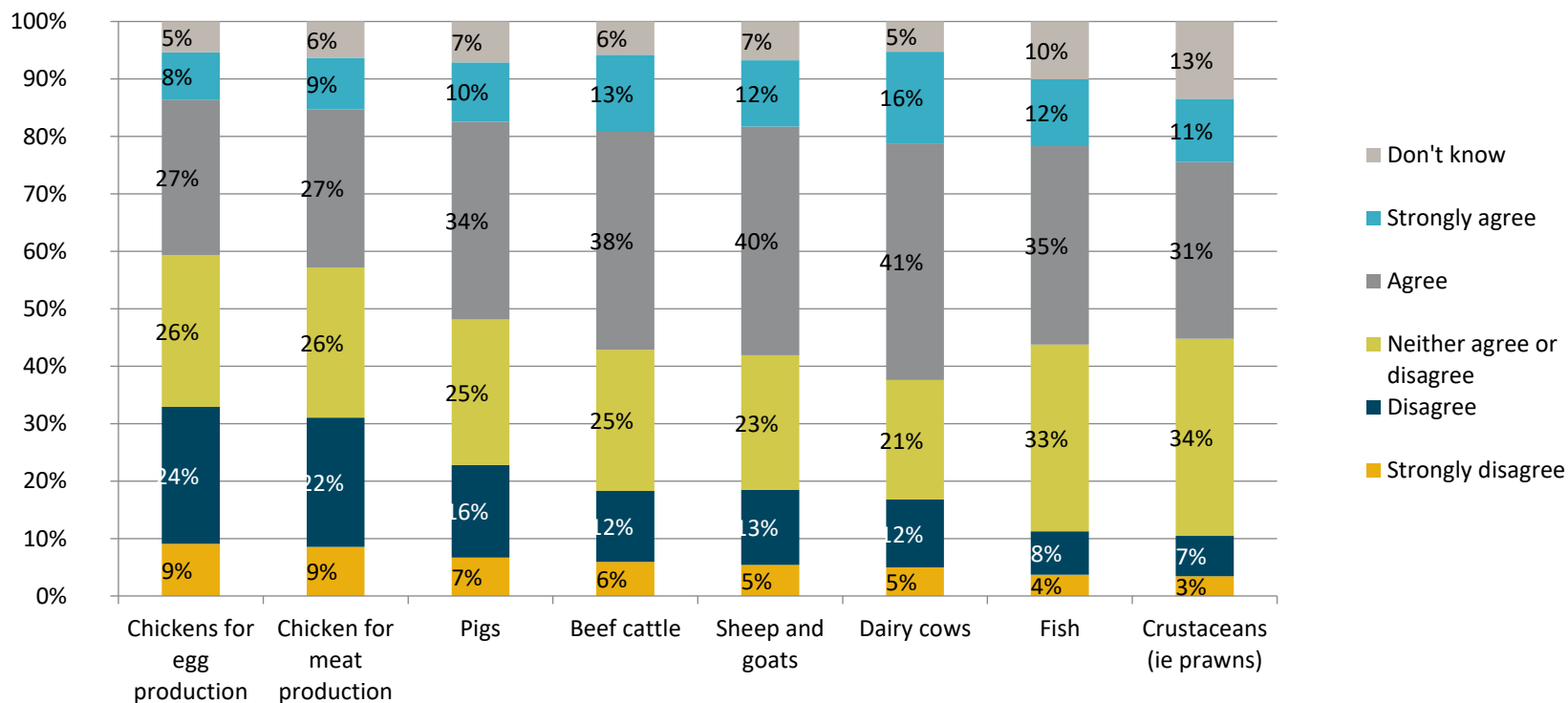
There is a strong correlation between knowledge about farm animal welfare and how serious the issue is regarded

**To what extent do you consider farm animal welfare to be an issue?
How informed are you about farm animal welfare?**



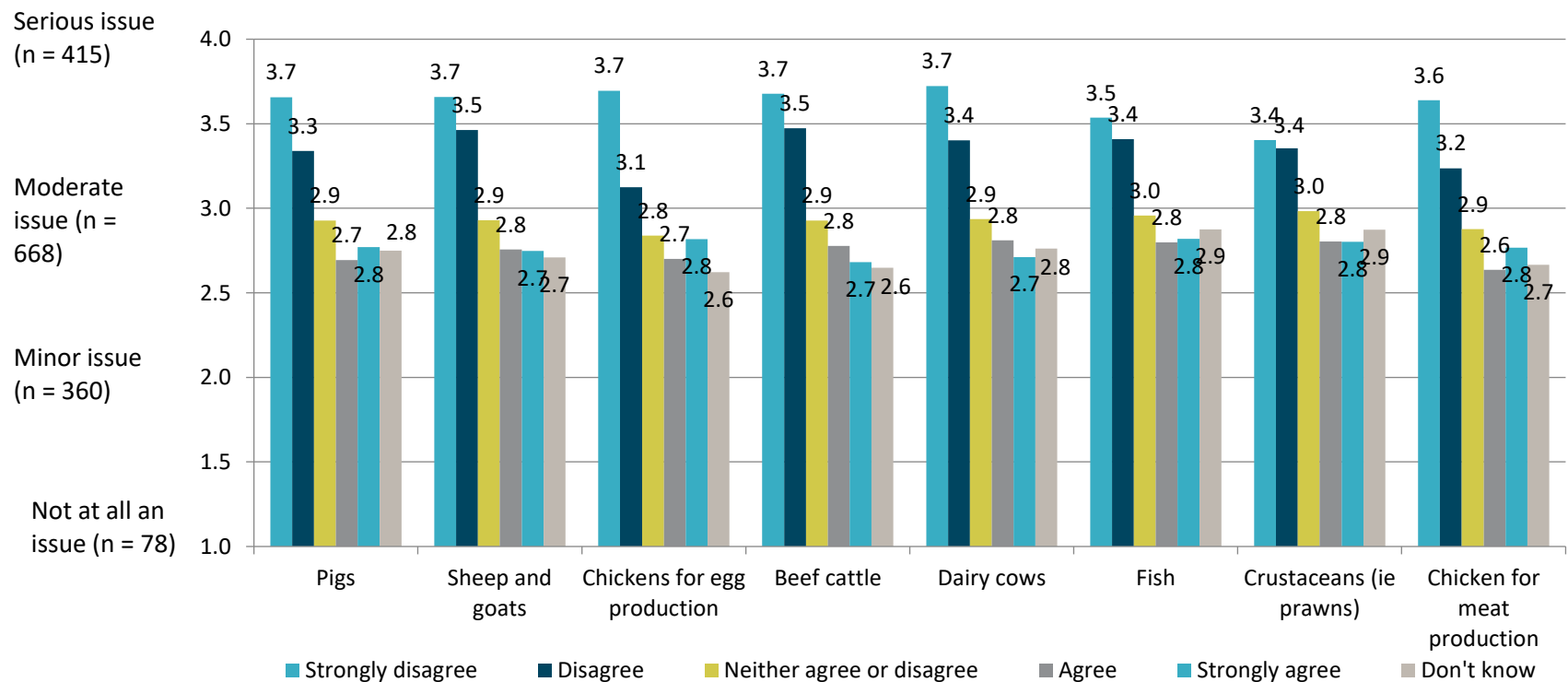
The public disagrees the most that chickens for egg production currently have good welfare standards

Do you agree that the welfare of the following farm animals is generally good?



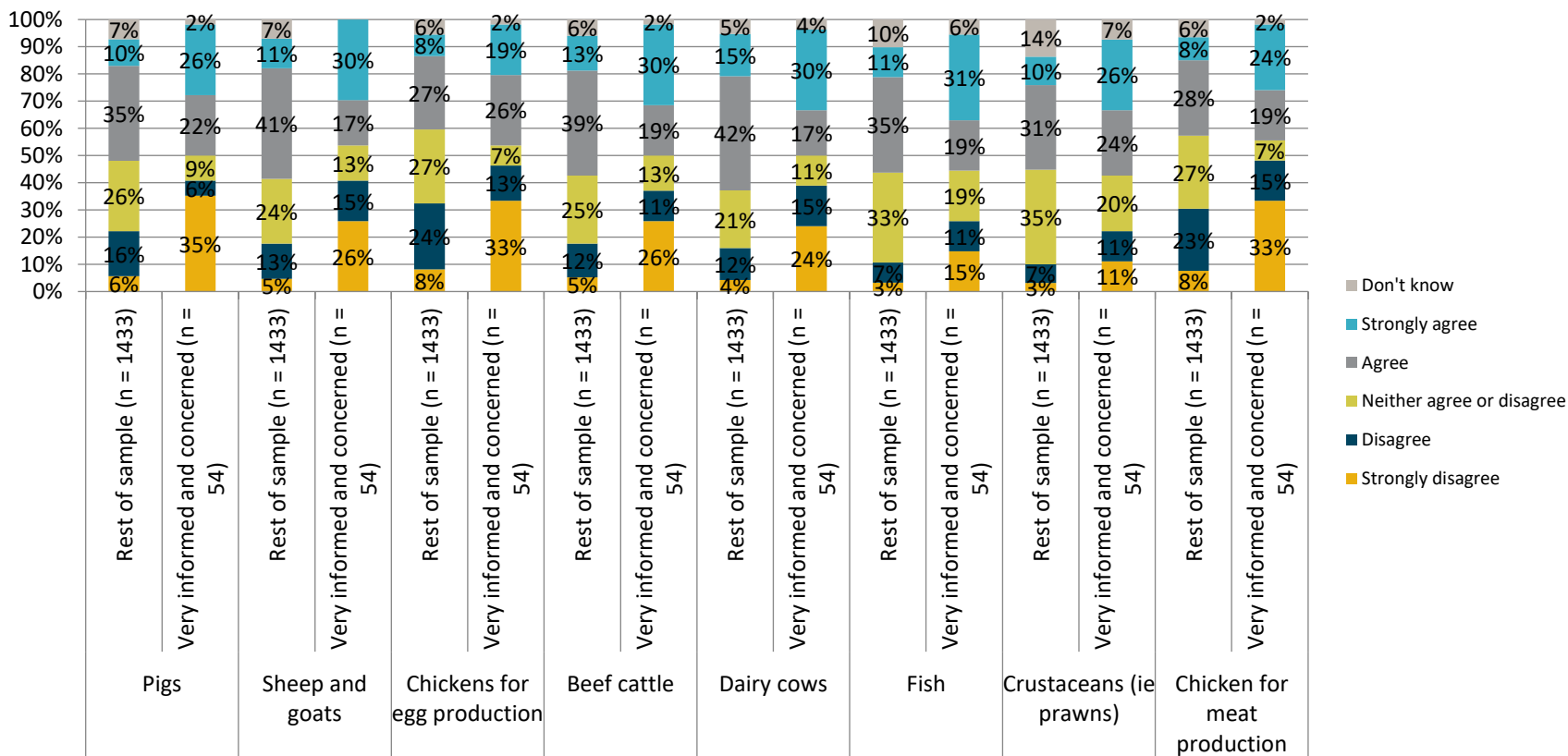
The greater the extent to which animal welfare is perceived to be an issue, the less likely participants were to view animal welfare standards as generally good

To what extent do you consider farm animal welfare to be an issue? Do you agree that the welfare of the following farm animals is generally good?



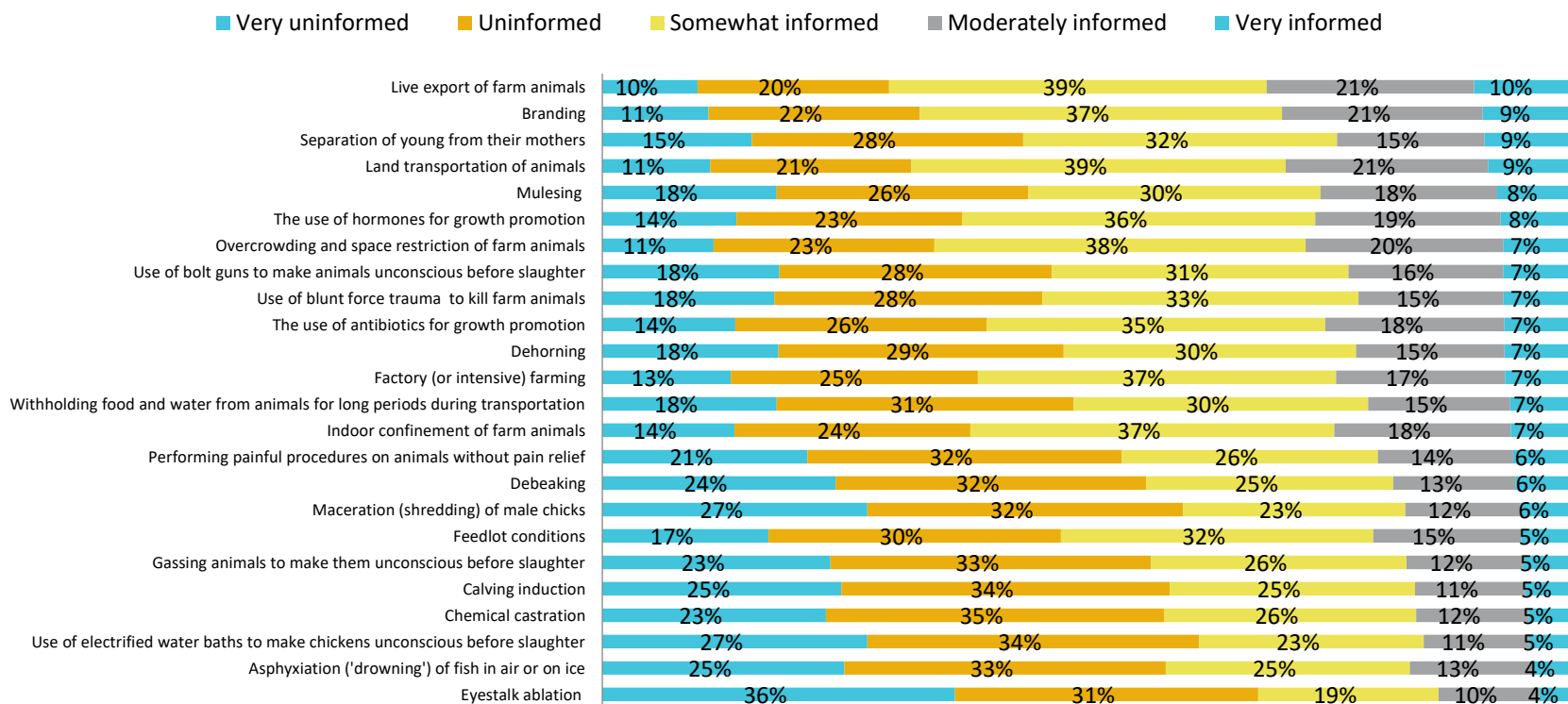
The 'very informed and concerned' segment of the public is most likely to disagree with positive statement on farm animal welfare

Do you agree that the welfare of the following farm animals is generally good?



Level of knowledge about specific agricultural practices differs. The public feels most knowledgeable about live export

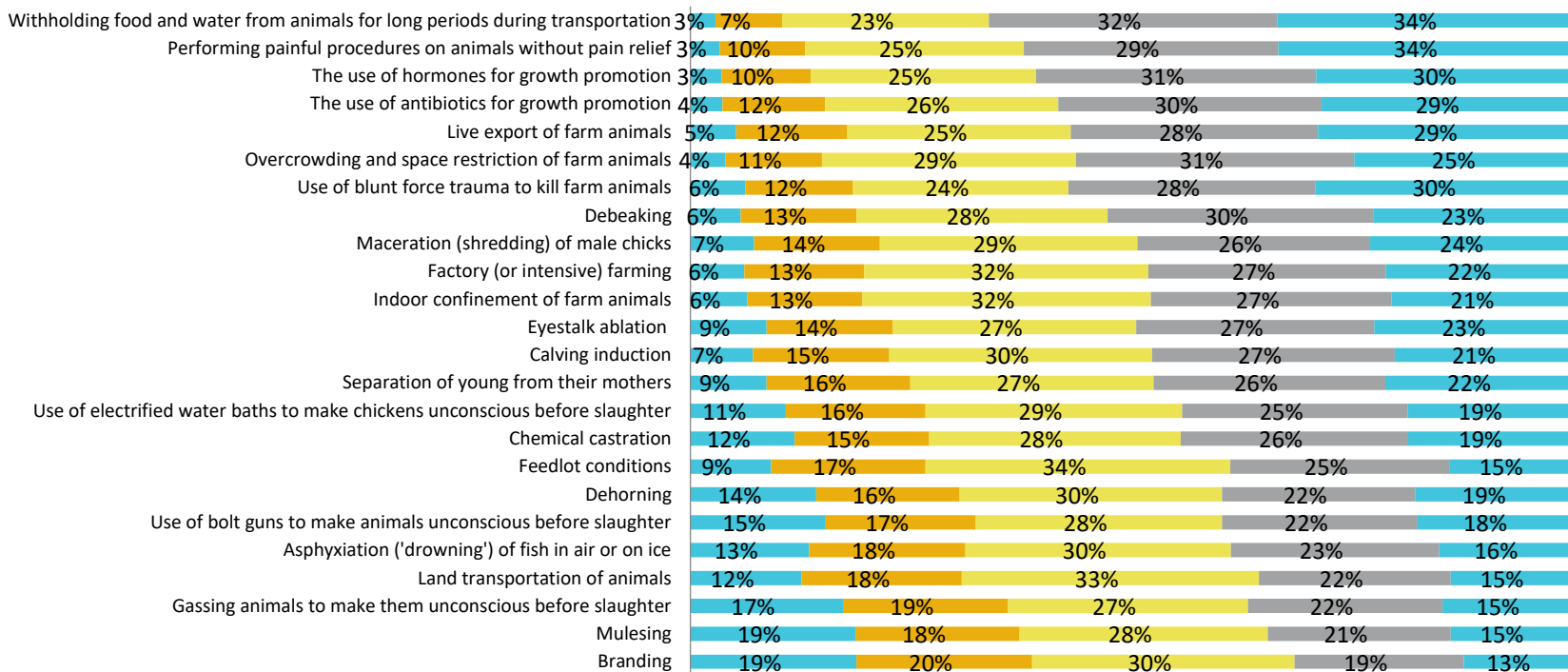
How informed on this topic would you say you are?



Practices that could be perceived to have some benefit to the animal are met with less concern than those that are seen to cause unnecessary pain

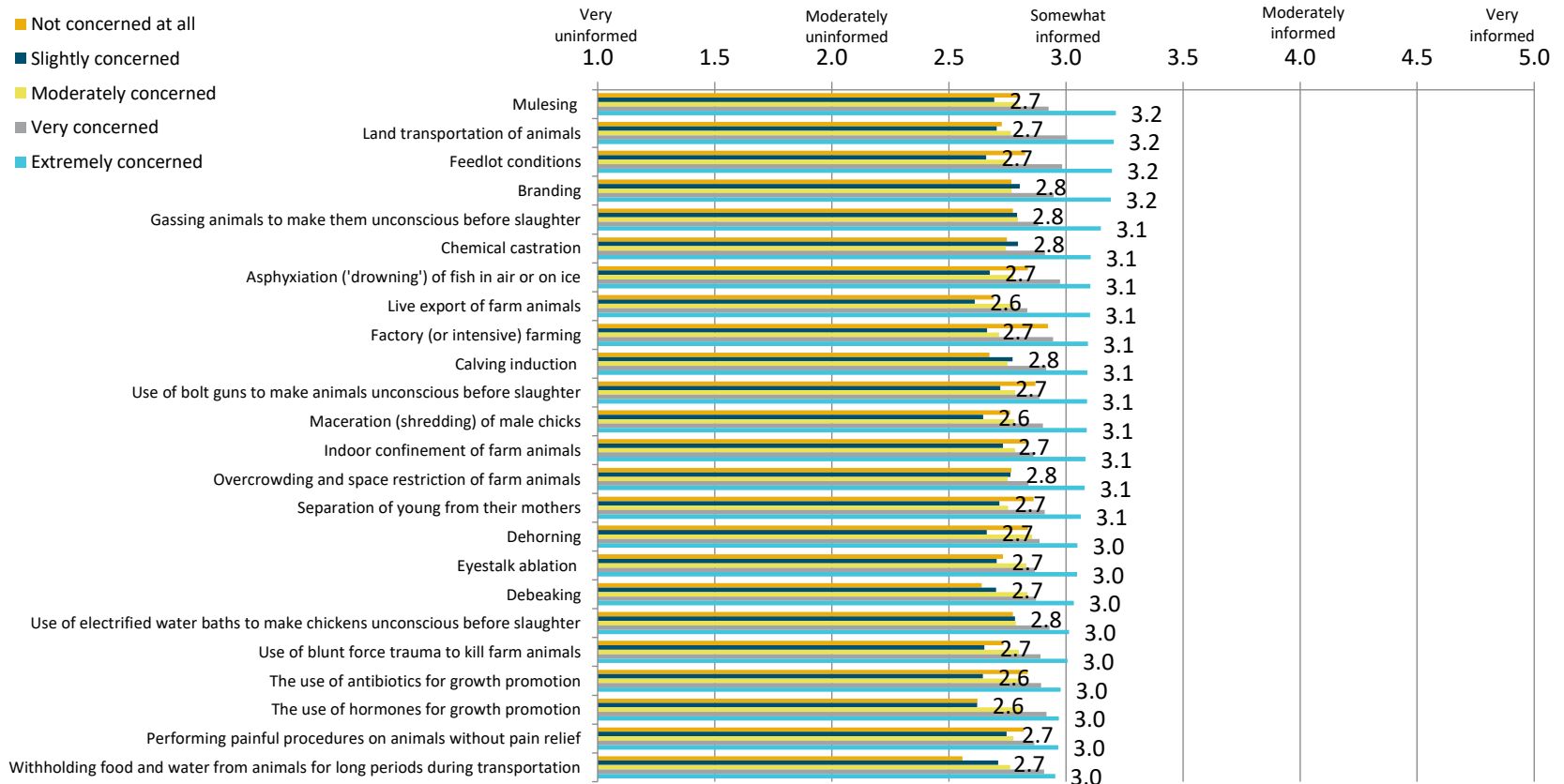
How concerned are you about the following agricultural practices?

■ Not concerned at all ■ Slightly concerned ■ Moderately concerned ■ Very concerned ■ Extremely concerned



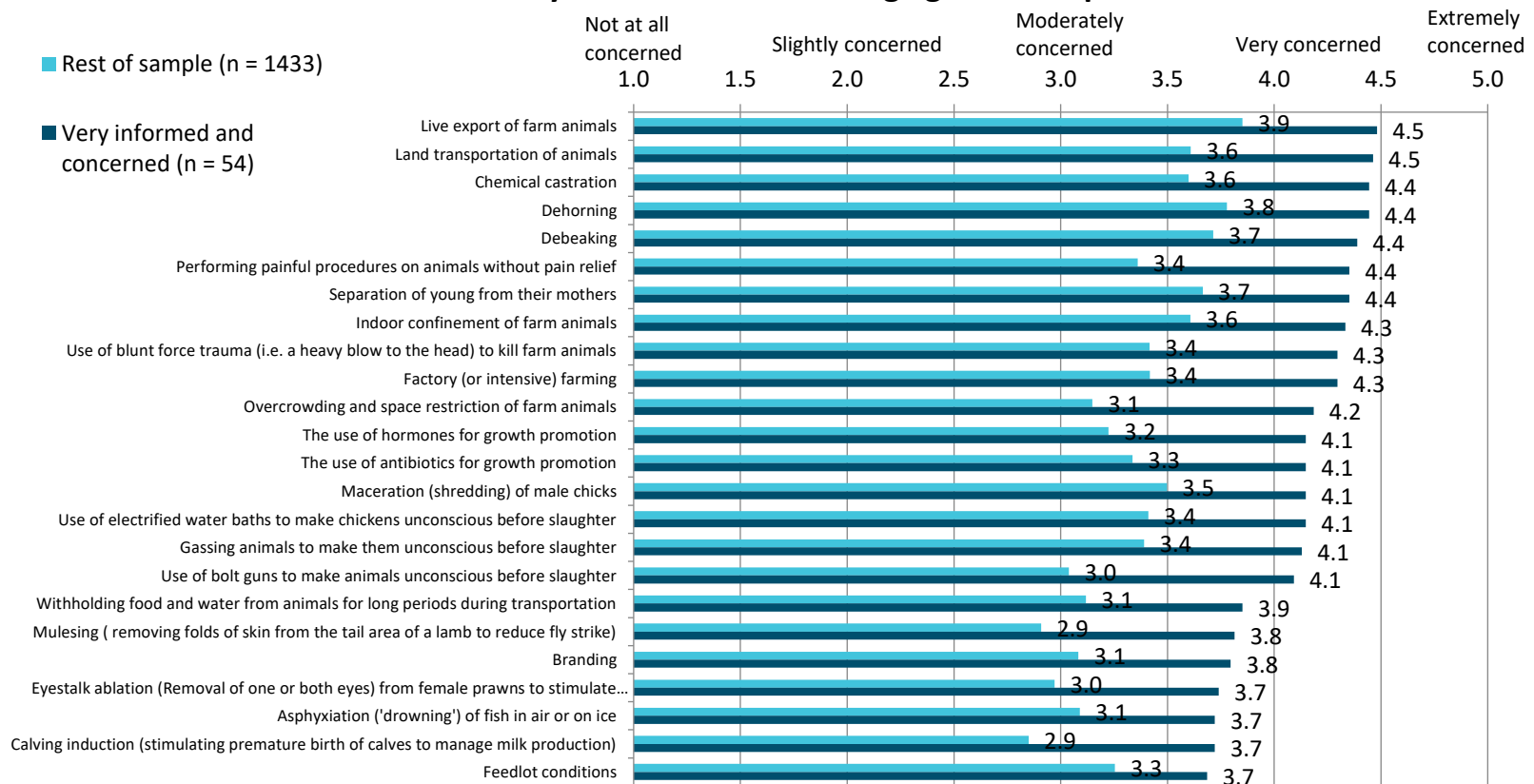
Concern is likely to be higher if the public is more informed about farm animal welfare

How concerned are you about the following agricultural practices? How informed are you about farm animal welfare?



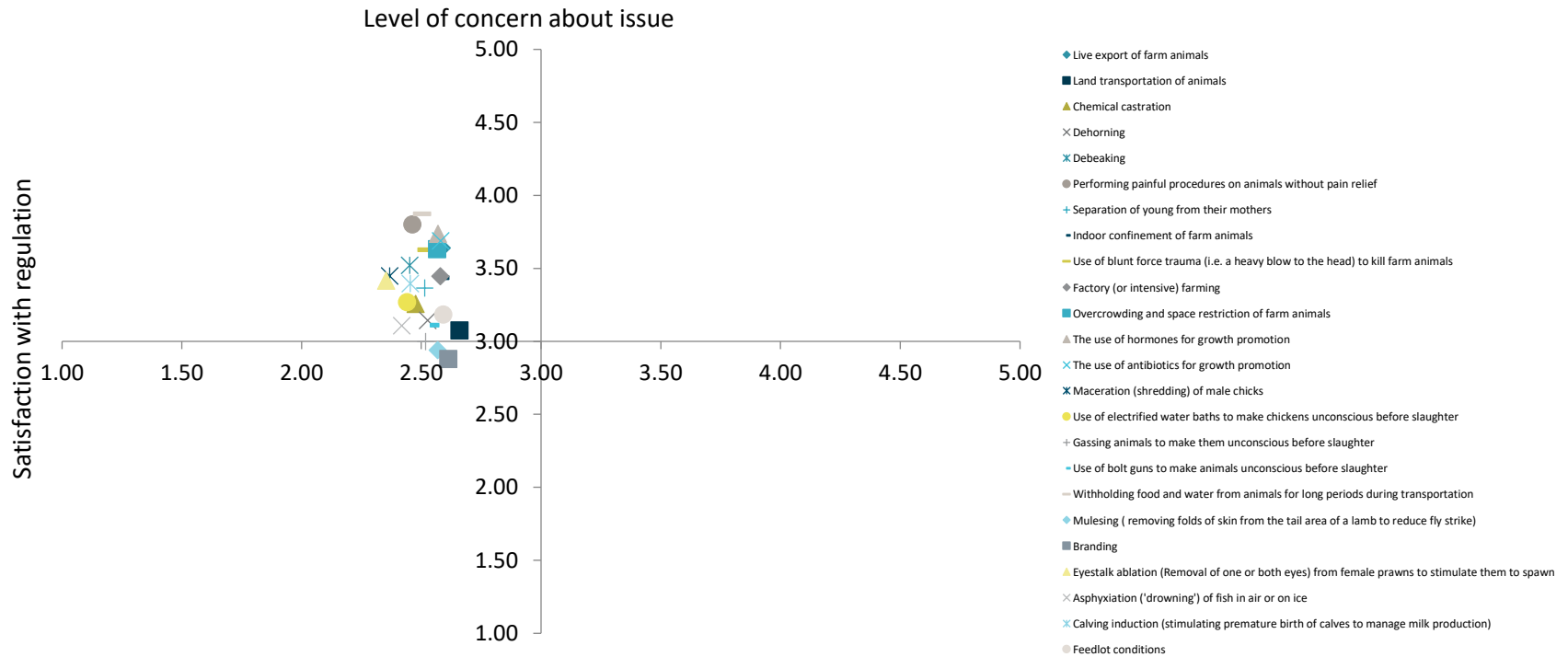
The 'very informed and concerned' segment of the public expresses significantly higher concern about specific agricultural practices

How concerned are you about the following agricultural practices



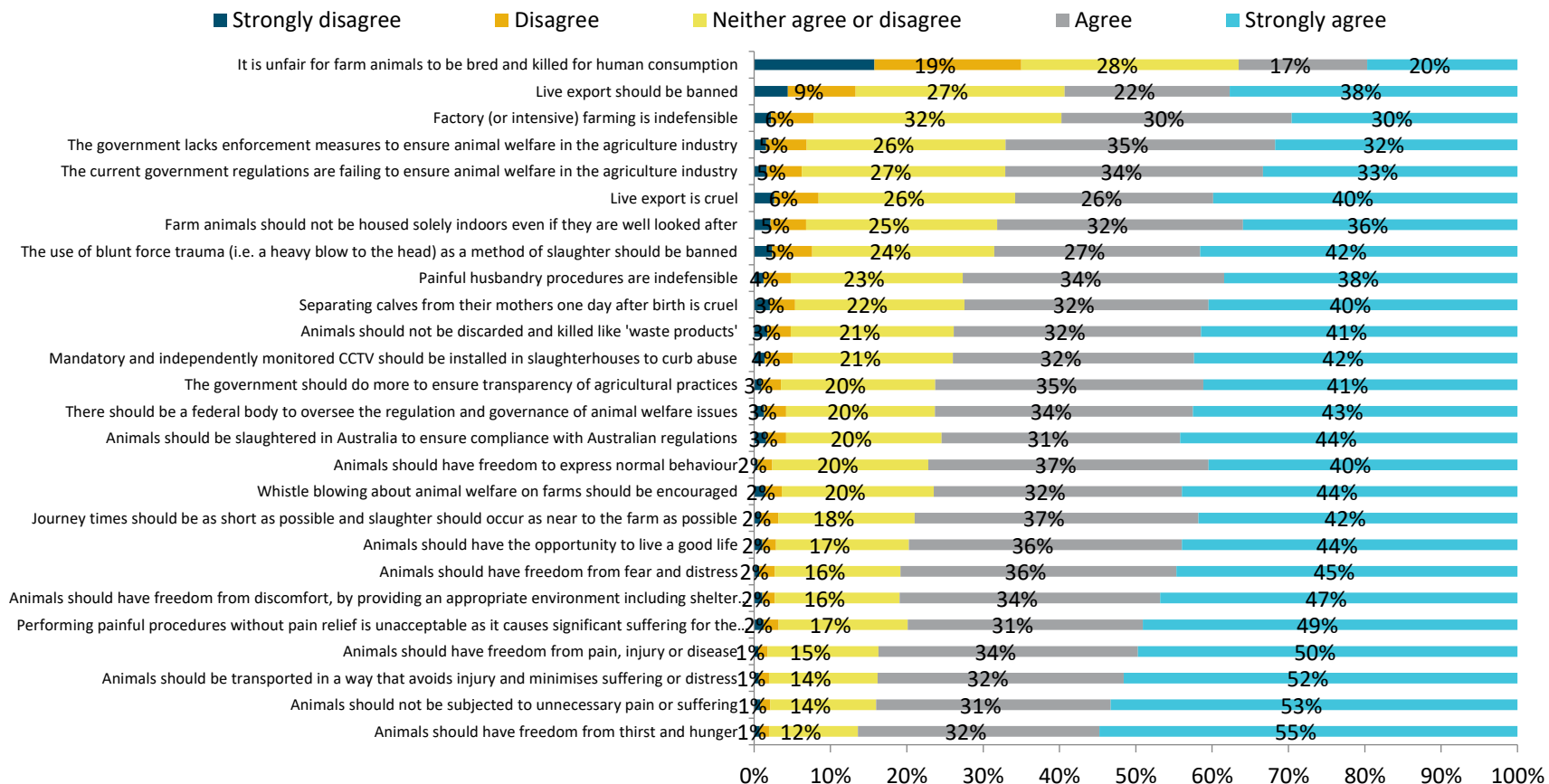
Current regulation insufficiently addresses the public's concerns about specific agricultural practices

How much does current regulation address your concerns about this issue? How concerned are you about the following agricultural practices?



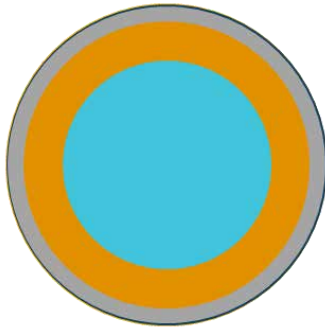
There is an overall strong alignment to activists' views on how animals should be treated

How much do you agree with the following statements about farm animal welfare?

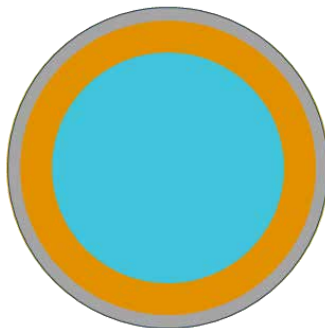


There is an agreement that the transport of animals should be limited where possible

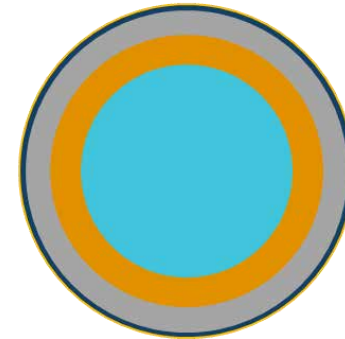
Journey times should be as short as possible and slaughter should occur as near to the farm as possible



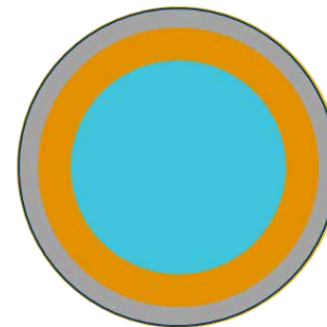
Animals should be transported in a way that avoids injury and minimises suffering or distress



Live export is cruel



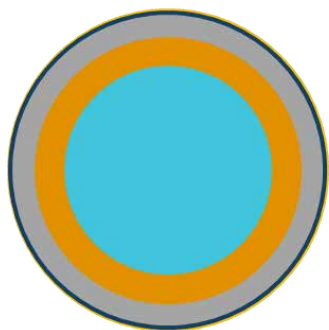
Animals should be slaughtered in Australia to ensure compliance with Australian regulations



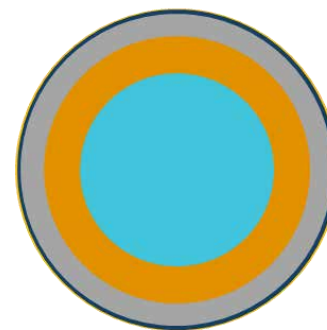
- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

Separation of bobby calves, painful procedures and restricting animals are all seen as issues

The use of blunt force trauma (i.e. a heavy blow to the head) as a method of slaughter should be banned

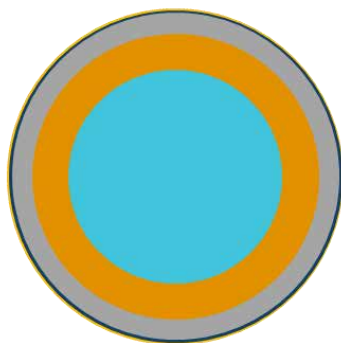


Farm animals should not be housed solely indoors even if they are well looked after

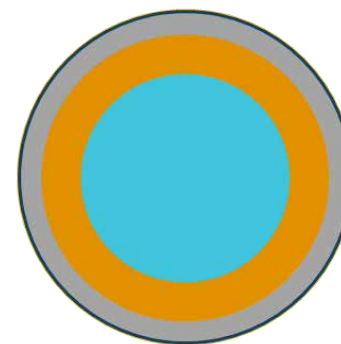


- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

Separating calves from their mothers one day after birth is cruel

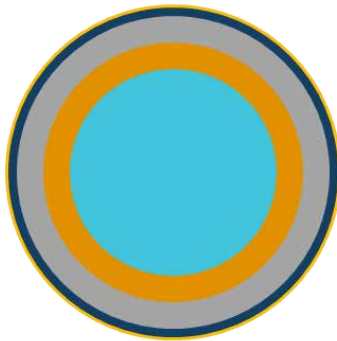


Painful husbandry procedures are indefensible

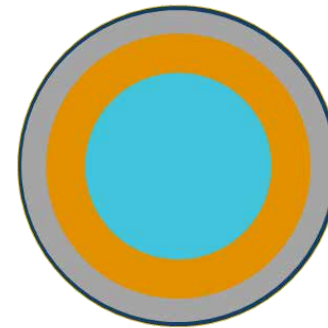


There is agreement that the government is not ensuring or enforcing measures to ensure animal welfare

Live export should be banned

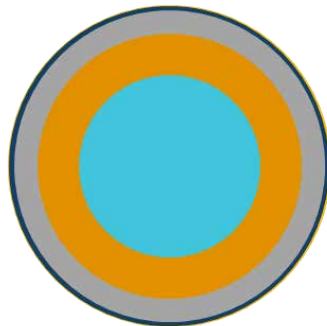


The current government regulations are failing to ensure animal welfare in the agriculture industry



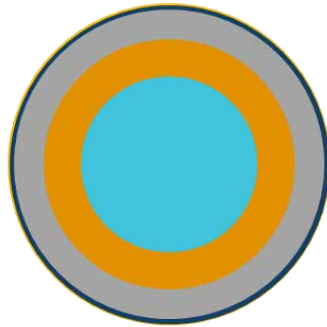
- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

The government lacks enforcement measures to ensure animal welfare in the agriculture industry

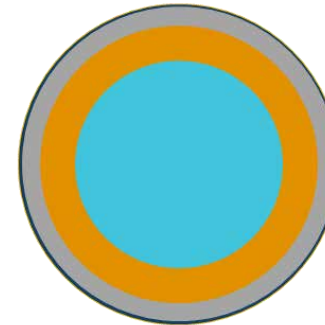


While there is concern about factory farming the majority of the public is not morally opposed to farming

Factory (or intensive) farming is indefensible

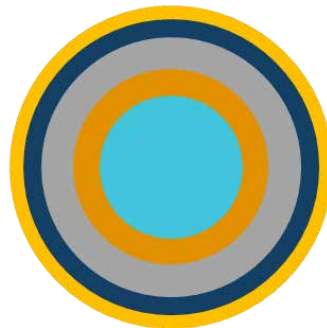


Animals should not be discarded and killed like 'waste products'



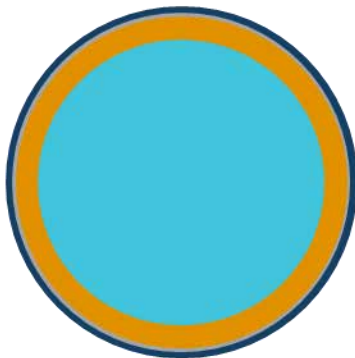
- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

It is unfair for farm animals to be bred and killed for human consumption

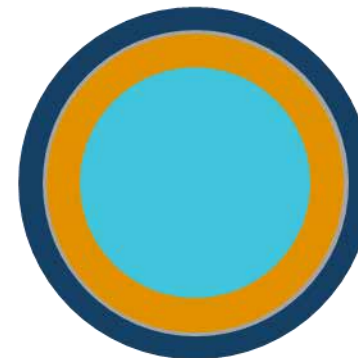


Farmers are perceived to care about their animals but there is also disagreement that the campaigns of animal welfare activist are too extreme

Farmers care about animal welfare



The actions and campaigns of animal welfare activists are too extreme



- Strongly disagree
- Disagree
- Neither agree nor disagree
- Agree
- Strongly Agree

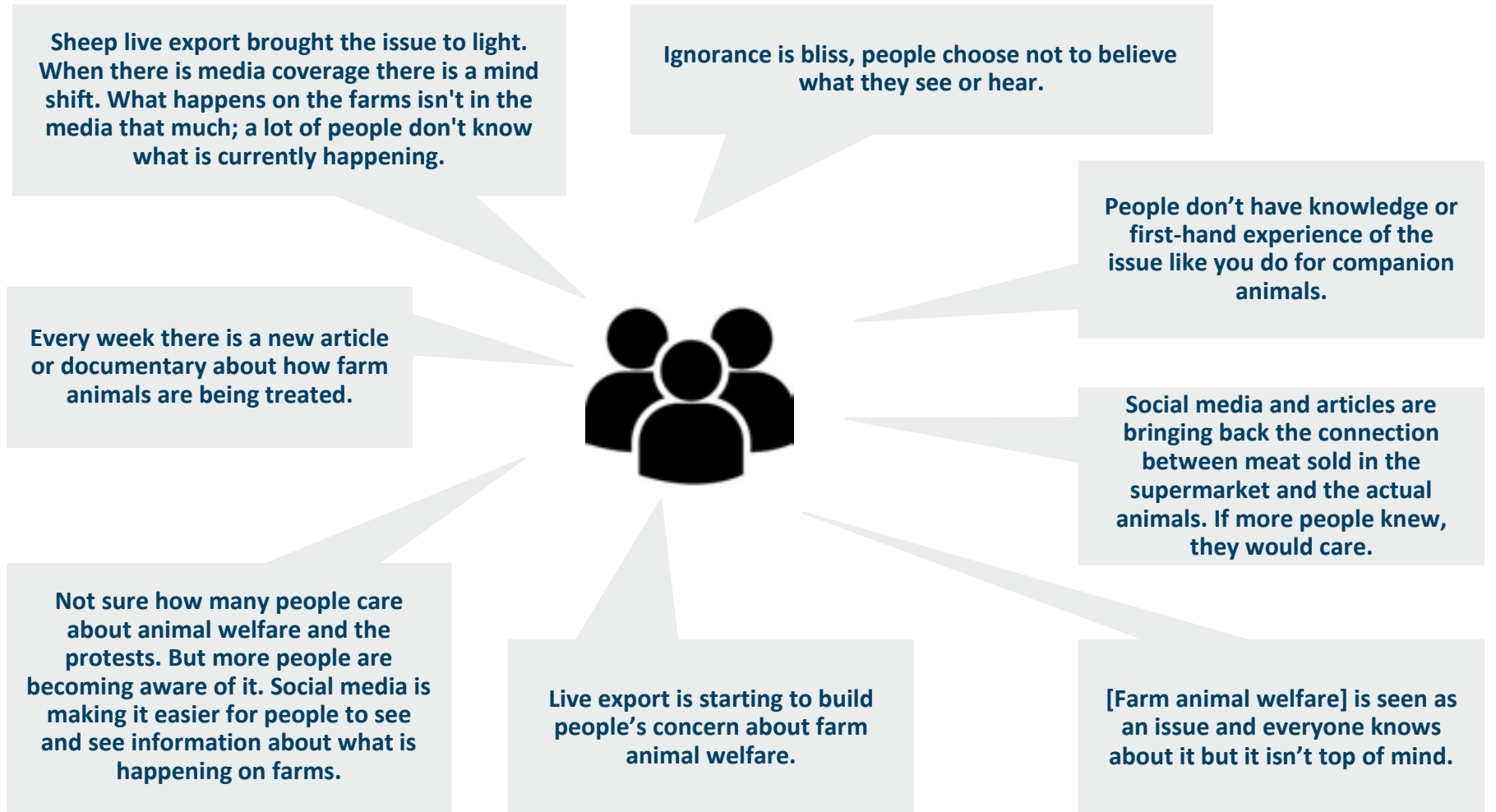


Appendix D - Qualitative Findings

Awareness about farm animal welfare

Perth	Melbourne	Brisbane
Attentive		
<ul style="list-style-type: none"> • There is a perception that a shift in mindset is happening, as there is an increase in media coverage on agricultural practices such as live export. In addition, companies are started to respond by offering vegan and vegetarian options. • People in metropolitan cities are still unaware of agricultural practices. 	<ul style="list-style-type: none"> • General agreement that animal welfare is an issue that more and more people are becoming aware of, and not only an issue that activists care about. An increase in campaigns and advertisements are increasing awareness of the issue, particularly for the younger generation. 	<ul style="list-style-type: none"> • Animal welfare is seen as an issue of concern but there is also belief that this view might not be shared by everyone. • Agreement exists that there is a shift in mindset around eating meat. However, animal welfare is not necessarily seen as the driver of this shift. Health and environmental impacts are also seen to be playing an influential role. • While a change in the general public's view is apparent, there is a strong push back from the industry and the government.
Browser		
<ul style="list-style-type: none"> • The general perception is that concern is confined to a small group of people. Awareness and concern differ amongst the population due to a lack of first-hand experience. There is a belief that people in metropolitan areas are unaware of issues. • Participants believe that even if people are aware of certain practices and disgusted by them, they still will continue to purchase animal products. • While there is a view that the issue is not being raised at a political level, it is seen as becoming more common. This is demonstrated in the debate on live export and free-range eggs, as well as increases in activism around the issue and a trend towards organic and vegan products. 	<ul style="list-style-type: none"> • There is a belief that media coverage on issues such as live export is creating a shift in mindset. Previously not many people were aware of the issue. Related factors such as the health impacts of eating meat is contributing to concern. • There is a perception that to some degree it could be a middle-class issue and that lower classes might not have the luxury to be concerned. 	<ul style="list-style-type: none"> • Farm animal welfare is seen as an issue that everyone knows about, but that isn't at the front of anyone's mind other than activists. • Participants believe that while it might not be raised as a political issue, there is awareness of the issue due to activists and the information shared on social media.
General public		
<ul style="list-style-type: none"> • Participants don't see farm animal welfare as an issue that is actively talked about. They feel that the issue is polarised. 	<ul style="list-style-type: none"> • Participants don't believe that farm animal welfare is a topic of concern for the broader public and that awareness of the issue is likely to be higher in cities like Melbourne. • There is a belief that vegetarianism and veganism is becoming more popular, but that this primarily driven by environmental concerns. 	<ul style="list-style-type: none"> • While there is agreement that media coverage is increasing the awareness of farm animal welfare, it not seen as a priority or political issue. Participants feel that not everyone can afford to be concerned.

Quotes – awareness about farm animal welfare



Sentience and other drivers of concern

Perth	Melbourne	Brisbane
Attentive		
<ul style="list-style-type: none"> • There is general agreement that animals are sentient beings, that they have the right to a good life and to be treated humanely. • While participants don't distinguish between commodity and companion animals there is a perception that companion animals have better lives because regulation around them is stricter. • It is easier to relate to "land" animals, see them acting like humans, taking care of each other etc. Fish on the other hand are seen as having less of a "life". • Consumption and purchasing behaviour have changed due to images shown in the media, documentaries, and news regarding live export. 	<ul style="list-style-type: none"> • General perception that animals are sentient beings and can feel pain. • There is a belief that all animals (farm and companion) are similar at the core, but that companion animals are treated better. 	<ul style="list-style-type: none"> • Becoming aware of the issue by seeing graphic images and videos of certain agricultural practices was mentioned as a driver of concern. • Participants mentioned changing consumption and purchasing behaviours based on the recent exposé. • Other drivers that have led to a change in behaviour are the environmental impacts related to farming. • There is agreement that socio-economic position determines whether someone is able to act on these concerns.
Browser		
<ul style="list-style-type: none"> • There is strong agreement that animals are sentient beings and that their personalities and behaviour differ depending on what environment they are put in. • Participants don't think there is an inherent difference between farm animals and companion animals but do agree that companion animals are treated better. • The financial pressure farmers are under and foreign ownership are mentioned as drivers of concern. • There is a perception that farmers might need to cut corners to keep costs down, and that foreign owned farms would have lower animal welfare standards. 	<ul style="list-style-type: none"> • While there is general agreement that animals are sentient, there is also a belief that sentience might differ depending on intelligence of the animal. • Awareness of agricultural issues is mentioned as a driver of concern and in some cases led to a change in consumption and purchasing behaviour. • The environmental impact of farming was also raised as an area of concern. 	<ul style="list-style-type: none"> • There is a general agreement that animals are sentient, feel pain and have the capability to have emotional lives. There is a belief that the degree of this varies between animals, and overall fish are seen as less sentient. • Participants mention changing consumption behaviour due to related issues such as health effects and a trust deficit regarding where the meat is coming from. • Related areas of concern also include the environmental impacts, the use of steroid and chemicals, and the financial pressure put on farmers by retailers.
General public		
<ul style="list-style-type: none"> • There is an agreement that animals are sentient and capable of feeling pain. • There is a perception that concern is higher when certain practices are exposed, but that it doesn't stay at the front of people's minds. 	<ul style="list-style-type: none"> • Agreement that animals are sentient but to a different extent than humans are. Fish are mentioned as being the least sentient out of all animals. Participants believe there is a difference between farm and companion animals. • There is a general perception that animals do not look for a good or better experience as they do now know what else to expect. 	<ul style="list-style-type: none"> • There is agreement that animals are sentient, that they have wants and needs and deserve to have these met. • People were more motivated when they became more informed, and after seeing certain agricultural practices first hand. • Related areas of concern are the use of hormones and antibiotics.

Quotes – sentience and other drivers of concern

I am concerned about environmental aspects of farming. It is resource intensive to produce meat.

Animals have needs, choosing not to meet these needs is cruel.

Antibiotic resistance is being caused by farming practices. There are health issues associated with the use of antibiotics and hormones in meat.

Working with animals has changed my perception of them. I see them as sentient, caring for their young, and having a will to live. I now connect meat in the supermarket with the actual animal; I was naïve before.



I eat vegetarian meals more frequently as well as kangaroo meat. The reason for this is concern for the environment.

I reduced the amount of meat I was eating because I don't know where it's coming from. There is a lot of water and hormones in it.

I don't like that dairy cows are owned by the Chinese. Foreign ownership is reducing profits for Australian farmers.

Concern about specific animals and agricultural practices

Perth	Melbourne	Brisbane
Attentive		
<ul style="list-style-type: none"> • Live export is at the front of peoples' minds and was mentioned right at the start of and throughout discussion. • Other practices that are of concern are the use of antibiotics and hormones for growth promotion, inhumane slaughtering practices, and interfering with the natural cycle of animals i.e. through artificial insemination. • In addition, there is concern that adhering to standards is not enough. Current regulations are perceived to set a relatively low standard. • It is believed that it's not enough to only comply with current regulations, as the standards are quite low. 	<ul style="list-style-type: none"> • While standards are perceived to be better in Australia than abroad, participants are not satisfied that animals in Australia are generally treated well. • Specific practices that were mentioned include overcrowding, inhumane slaughter, live export, separation of bobby calves from their mother, gassing of pigs, bycatch of the fishing industry, and animal testing. 	<ul style="list-style-type: none"> • While standards are perceived to be better in Australia than abroad, participants are not satisfied that animals in Australia are generally treated well. • Participants were equally concerned about fish and other types of animals. • Specific practices that were mentioned include the space restrictions for chickens, maceration of male chicks, and inhumane slaughtering practices such as kosher and cooking of crustaceans alive.
Browser		
<ul style="list-style-type: none"> • There is a perception that the animal welfare standards in Australia are likely better than in other countries but that the situation is likely to worsen as the demand for meat increases. • Concern about fish farms and commercial fishing were motivated by sustainability rather than animal welfare. • Battery cage hens, live export, and the treatment of animals of Australian animals abroad are seen as issues due to media reporting. Other practices that were condemned include the space restriction of animals, separation of bobby calves from their mothers, and inhumane slaughter practices. 	<ul style="list-style-type: none"> • There was a feeling that there is insufficient information to be able to determine whether farm animals are currently being treated well in Australia. • Live export, slaughtering practices, bycatch, overfishing, and fish farming were mentioned as practices that raise concern. 	<ul style="list-style-type: none"> • Participants generally agreed that animals in Australia are being treated better than in other countries, but that standards should be improved. • Practices that raised concerns were bad living conditions of animals on farms and slaughter practices. • Once being informed about the maceration of male chicks and the separation of bobby calves from their mothers, there was concern about this being standard practice. • Concerns around fish farming were also raised, primarily due to environmental reasons.
General public		
<ul style="list-style-type: none"> • There were differing views on whether current regulation is sufficient and ensures humane treatment of the animals. • There was specific concern about live export and the space restrictions for pigs. • There is an understanding that certain practices are driven by efficiency and cost. 	<ul style="list-style-type: none"> • Participants thought that animals are mostly treated well in Australia and agree that certain practices are necessary for the safety either of the animal or the farmer. • Cages, space restriction, live export, and the land transport of animals were areas of concern. • There was mention of cattle being perceived to have better welfare standards, and that concern is higher for dairy cows, pigs, and chickens. 	<ul style="list-style-type: none"> • Participants generally felt that animal welfare standards in Australia are better than in other countries. • However, there was also a general feeling that there is insufficient information to know what happens on farms.

Quotes – concerns about specific animals and practices

I feel that foreign owned farms might have different standards than Australian ones.

Chickens are an obvious concern because we have seen the issue in the media.

We should be enforcing laws and keeping it within the country to keep the same standards and protecting the health of the people as well as ensuring good quality meat.



I consider myself a republican and free market capitalist type but watching the footage of the live export ships changed my mind.

Overcrowding is the biggest issue, it causes stress for the animals.

I would eat fish and prawns as I don't see them as overly aware, but I wouldn't eat an octopus because they are very intelligent.

Outrage factors relating to farm animal welfare

Perth	Melbourne	Brisbane
Attentive		
<ul style="list-style-type: none"> Trust: there is a lack of trust in the industry and government when it comes to farm animal welfare. Transparency: participants did not feel that industry is transparent about its practices or what certain standards mean i.e. free range, cage free etc. Certainty: it is believed that the information available is conflicting and biased, preventing informed choice. Natural vs. Artificial: factory farming and certain practices are viewed as being unnatural. 	<ul style="list-style-type: none"> Trust: lack of trust in whether products labelled as free-range and organic really are. Transparency: participants feel that industry has a lot to lose if people don't purchase their products as such there is a motive to keep bad practices hidden. Natural vs. Artificial: factory farming and certain practices are viewed as being unnatural. Moral: certain participants are morally opposed to the breeding and killing of animals for human consumption. Certainty: it is believed that the information available is conflicting and biased, preventing informed choice. 	<ul style="list-style-type: none"> Natural vs. Artificial: there is a perception that the amount of meat that humans are consuming is unnatural. Trust: there is a lack of trust in whether the industry is actually adhering to standards. Certainty: there is a perception that there is insufficient information available about what is happening on farms.
Browser		
<ul style="list-style-type: none"> Trust: there is a perception that the industry cannot be trusted; participants were particularly sceptical of products marketed as free-range. Transparency: there is a belief that farmers are not being transparent about current practices and might be lying to keep costs low. Certainty: there is a perception that the available information is conflicting, making it difficult to determine what is true and false. Natural vs. Artificial: factory farming seen as something unnatural. 	<ul style="list-style-type: none"> Certainty: there is a perception that there is insufficient information to be able to determine whether animals are being treated well. Trust: participants felt unsure about what information to trust. Moral: there is a view that it is morally wrong to kill animals. 	<ul style="list-style-type: none"> Transparency: there is a perception that industry relies on people not knowing what happens, and a result it is difficult to find information about agricultural practices. Trust: there is uncertainty on whether to trust that free-range eggs really are free-range. Control: industry is perceived to be powerful enough to do anything it wants, even if it is illegal. Certainty: there is a feeling that there is insufficient information to determine whether certain products have better animal welfare practices.
General public		
<ul style="list-style-type: none"> Transparency: there is a perception that there is a lack of transparency about what is currently happening on farms, forcing the public to rely on investigative media. Trust: there is perception that the information provided cannot be trusted because it is biased and has a hidden political agenda. 	<ul style="list-style-type: none"> Trust: there is a lack of trust in the ability of government to enforce standards as well as maintain low prices for meat. 	<ul style="list-style-type: none"> Transparency: there is a perception that information is being buried. Certainty: it is believed that the information available is conflicting and biased, preventing informed choice.

Quotes - outrage factors relating to farm animal welfare

There is lack of transparency. There is a lot going on behind closed doors and you end up relying on the media.

Meat is too cheap – it can't be possible to produce it for that price, there must be something wrong in the industry.

I believe that most of the time animals are treated well, but I have a strong suspicion that there are things happening on factory farms that are out of view.

Industry isn't being transparent. We don't know what happens on industrial farms, we don't know enough about industrial farms to be able to determine whether the standards are good.



I want more information about what is happening. Educating the public gives them a voice to make a choice. Without complete information they cannot enforce change.

Government is likely to let things slide if they are receiving funding from companies, there is a conflict of interest.

I feel that there's a lot we don't know. It's not actively put out there and we don't know what is happening.

I don't trust the industry, or the way things are portrayed. Certain things are kept hidden.

Solutions and barriers to change

Perth	Melbourne	Brisbane
Attentive		
<ul style="list-style-type: none"> Solutions mentioned by the participants included an independent and trustworthy government body to regulate the issue, the development of standards and certificates for good practice, and educating and informing the public on industry practices as well as the options the consumer has. Perceived barriers included cost, and the fact that eating meat is ingrained in our culture. 	<ul style="list-style-type: none"> Solutions mentioned by the public included educating the public to change attitudes, incentives for the industry to ensure good animal welfare practices, and providing animals with better living conditions including shelter and shade. Perceived barriers to ensuring better farm animal welfare included the current subsidies for milk and eggs, higher prices of vegetarian and vegan options, consumer demand for meat, the costs need to ensure change, and the habit of eating meat. 	<ul style="list-style-type: none"> Solutions mentioned included looking at alternatives such as lab grown meat, the government taking accountability, the proactive enforcement of regulation and getting ahead of the media, and ensuring that animal welfare is an issue for all political parties. Perceived barriers included demand for meat, the costs involved, the large proportion of the population that is dependent on the agricultural industry, the fact that for many farm animal welfare is an “out of sight out of mind” issue, and the conflict of interest having the Minister for Agriculture also being the Minister for Animal Welfare.
Browser		
<ul style="list-style-type: none"> Solutions mentioned included educating the population to follow a more plant-based diet, and industry transparency to increase knowledge about agricultural practices. Perceived barriers included the lack of space to ensure all farms are free-range, and the high demand for meat which is likely to keep increasing with a growing population. 	<ul style="list-style-type: none"> Suggested solutions included providing consumers with incentives, government “jumpstarting” the issue by raising awareness, and increasing industry transparency and visibility to allow consumers to make informed decisions. Perceived barriers included the expectation that the price of meat remains low, the costs of improving farm animal welfare standards, the economic dependency of communities on the agricultural industry, and the lack of incentives for farmers to adhere to standards. 	<ul style="list-style-type: none"> Suggested solutions included developing minimum standards set by government, ensuring there is no conflict of interest in government, and educating consumers. The perceived barrier was cost.
General public		
<ul style="list-style-type: none"> Solutions mentioned included providing industry with resources to improve standards and retailers encouraging the sourcing of ethical meat. 	<ul style="list-style-type: none"> Suggested solutions included better standards and labelling of products, and improving channels for consumer information. Perceived barriers were the high demand for meat, that animal rights are seen as lesser priority, the lack of space to ensure free-range products, and the difficulty in changing habits of eating meat. 	<ul style="list-style-type: none"> The solution mentioned was educating the population about agricultural practices. Perceived barriers included the growing demand for meat, the costs involved, and overseas competitors who are willing to provide lower prices and animal welfare standards even if regulation in Australia were to be changed.

Quotes - solutions and barriers

I would only be willing to pay more for a product if I can be certain that it is really ensuring better animal welfare standards and it's not just advertising and marketing.

Scale is a problem to ensure good animal welfare standards, the current demand makes it impossible. There should be efforts to reduce consumption.

The amount of meat that people require is driving up demand. It's not possible to slaughter all of these animals humanely.

Government should make sure that there isn't any conflict of interest. There should be no political donations from the industry that will get in the way of ensuring good animal welfare standards.

Animals have feelings. It's better for them to be able to roam around and be happy before they are slaughtered.

There should be incentives for the industry to adhere to good animal welfare practices

Whatever is being done to animals should be done humanely.

Farmers are not going to change their ways that will put them at a competitive disadvantage to others.

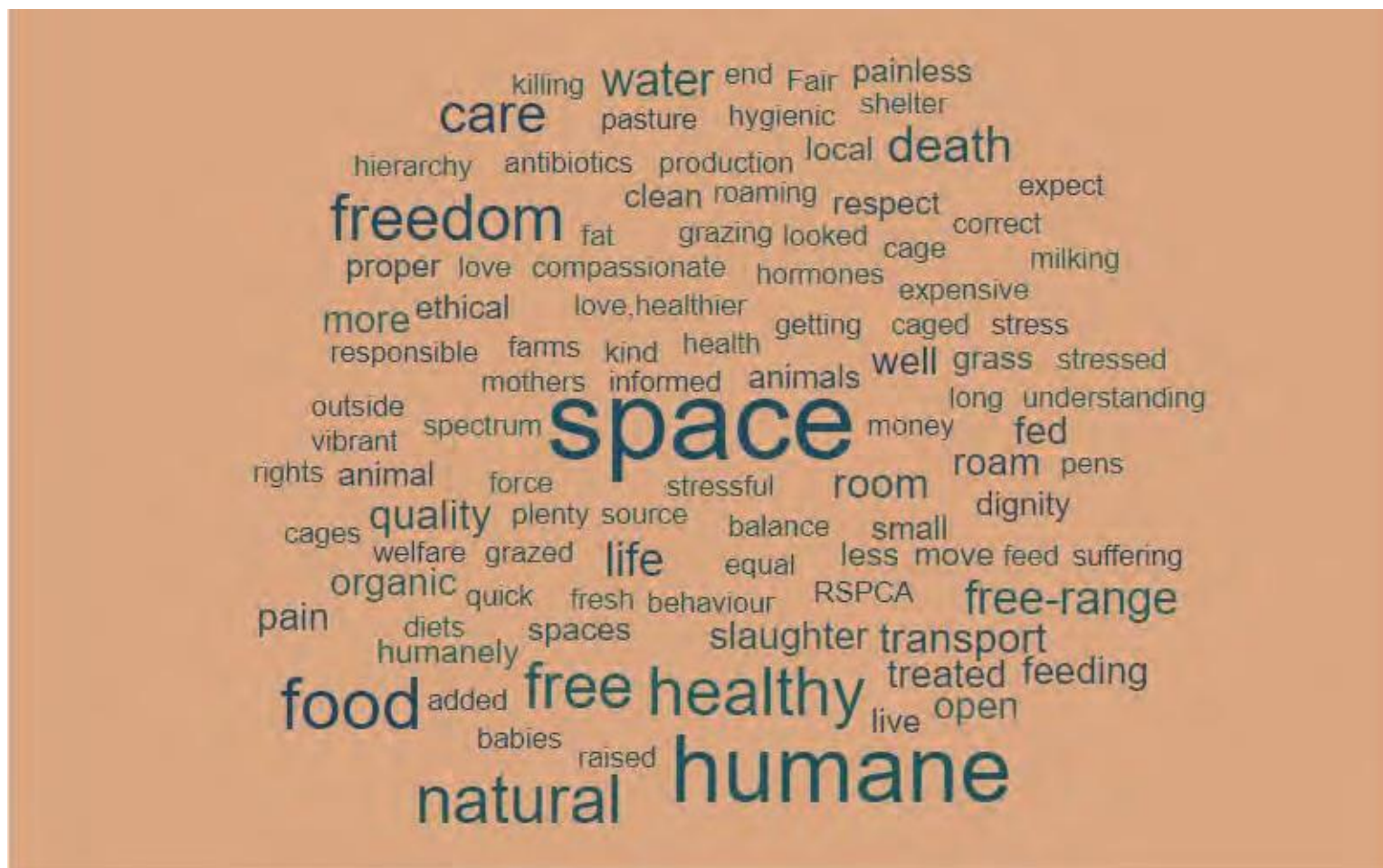
There is no willingness from the government to act, they are backing the farmer rather than the welfare of the animal

There should be more reputable places with outdoor capacity for animals

There should be better channels for consumer information so that the consumer can make an informed decision.



Words focus group participants associated with good animal welfare standards



Responsibility in ensuring farm animal welfare

Perth	Melbourne	Brisbane
Attentive		
<ul style="list-style-type: none"> Consumers and farmers were seen as moderately responsible, and the government as the most responsible. Exporters were also seen as being responsible. Consumers were seen as able to influence demand, but it was also understood that many are not in the financial position to do so. Overall, participants were willing to pay more for products that would ensure better animal welfare standards but only if the industry becomes more transparent about its practices. There was a perception that farmers should be responsible because they are in direct contact with animals, but might not have the resources to do so. Federal government is seen as responsible. Participants feel that industry might take advantage of inconsistent regulation across states. Specifically, Department of Agriculture is mentioned. 	<ul style="list-style-type: none"> Consumers, farmers, and government were all seen as highly responsible. Consumers were seen as responsible because they are seen to be driving demand for animal products. However, there was also the belief that they currently have insufficient information to make an informed decision. Farmers were seen as responsible, but there was also a lack of trust that farmers adhere to standards. Participants didn't believe that self-regulation is possible and described the need for an independent regulator. Government was seen as having the ability and responsibility to facilitate change and make things easier for farmers and consumers. The view of participants was that welfare should be regulated at the federal level to ensure standards are consistent across the country. 	<ul style="list-style-type: none"> Consumers were seen as moderately responsible, and farmers were perceived to have a high responsibility. Retailers were seen as responsible as participants believe they have the power to influence costs, prices, and behaviours. Participants were willing to pay more but only if they could trust what they buy really ensures better animal welfare standards.
Browser		
<ul style="list-style-type: none"> Consumers, farmers, and government were all seen to be highly responsible. Participants saw a role for themselves to consume less meat and make more informed choices about what animal products they buy. The majority would be willing to pay more for meat that has higher standards. While farmers were seen as highly responsible, there is an understanding that they may be responding to demand and experiencing high financial stress. Government is seen as responsible for ensuring minimum standards and making sure animals are slaughtered in Australia instead of abroad. Government was seen as being responsible for setting standards that industry will follow as well as developing and enforcing stricter regulation. 	<ul style="list-style-type: none"> Consumers were seen as moderately responsible while a high level of responsibility is placed on farmers and government. Consumers were seen as being able to influence demand, but there was also a view that consumers can't influence industry practices. Farmers were seen as highly responsible, but there was also a belief that they won't implement practices that are more expensive and will put them at a competitive disadvantage. Government was seen as being responsible for setting standards that industry will follow as well as developing and enforcing stricter regulation. 	<ul style="list-style-type: none"> Consumers and farmers were seen as moderately responsible. The government were seen as highly responsible. Consumers were seen as being able to influence demand. Farmers were seen as responsible because they are in direct contact with the animal. Government is seen as being responsible for setting a standard and enforcing it, as well as educating the public on the issue. Retailers were seen as being somewhat responsible for ensuring good animal welfare practices.

Responsibility in ensuring farm animal welfare

Perth	Melbourne	Brisbane
General public		
<ul style="list-style-type: none"> • Consumers were seen as having low responsibility and farmers and government as having high levels of responsibility. • It was a view of participants that consumers have little control over the situation because they have insufficient information to make informed decision about what animal products they buy. Furthermore, they do not necessarily have the financial luxury to spend more on products for animal welfare reasons. • Farmers were seen as responsible, but participants were also sceptical about their willingness to implement ethical practices because it would cost them more. • Government was seen as responsible for putting pressure on the industry and retailers as well as enforcing regulation. • Federal government is mentioned as being responsible because they can ensure consistent regulation. 	<ul style="list-style-type: none"> • Consumers were seen as having a low level of responsibility, while government and farmers were seen as moderately and high responsibility respectively. • Participants didn't feel that they, as consumers, were responsible for the issue. • Farmers were seen as responsible because they are in direct contact with the animals. However, there was also a perception that farmers view their animals as a business rather than animals they should care for. • There was a perception that government is currently not doing enough and that there should be more audits. There were also concerns that government is likely to let things slip if they receive funding from industry. • There were differing views whether state or federal government should be responsible. 	<ul style="list-style-type: none"> • Consumers were seen as moderately responsible and farmers and government were seen as highly responsible. • There was a view that consumers have insufficient power to influence industry practices. Despite this, participants were willing to pay more for animal products that have high animal welfare standards. The better quality and taste of the meat would justify the higher price. • While participants felt that farmers have a high level of responsibility, there was also a view that they are under external pressures and might have to make ends meet. Participants believe they have insufficient information to determine whether farmers are currently doing a good job. • Government is seen as being responsible to educate the public and ensure that the industry is adhering to the standards. • There is a general perception that animals are currently not doing enough and that it should be a responsibility of the federal government.

Quotes - responsibility in ensuring farm animal welfare

By the time that you get to the supermarket it should be a given that the meat has come from an animal that has been treated humanely and slaughtered ethically.

The government should be making sure the farmers are doing their job and responsibility isn't being pushed down to the consumer. Regulation needs to be better.

The federal government is reactive to investigative media but is not proactively seeking to find solutions. Regulations are there if the government wants to use them but it is not being enforced.

Teachers are being held accountable for higher levels of student achievement, the federal government should ensure farmers have the same level of responsibility over their animals to ensure good animal welfare standards

Consumers are responsible to a degree, but need a lot of education and support

If animal welfare was regulated properly by the industry and the government, the consumer wouldn't have to make a choice; they would be ensured that the animal products they bought had good animal welfare standards.

History tells that consumers can drive the change. If we choose to boycott a certain meat i.e. beef, we do have the power. Eat less and pay more, choose for cage-free, and RSPCA standards.

There should be accountability and real enforcement. Fines aren't enough, there should be true consequence and a carrot and stick approach.

Coles and Woolworths have such a big pull on what happens down the line, look at what happened with milk. They should be doing more.

[As a consumer] I am not getting paid to make sure that animals are treated better, that should be someone else's job.

Farmers are definitely responsible. It's where the animals are and therefore, they are responsible for making sure that the standards are met.

I want to see the government being proactive, fixing the problem before it gets any worse so that the status quo does not remain.

Farmers should be responsible but not only them. Supermarkets are putting pressure on farmers to provide meat for low prices.

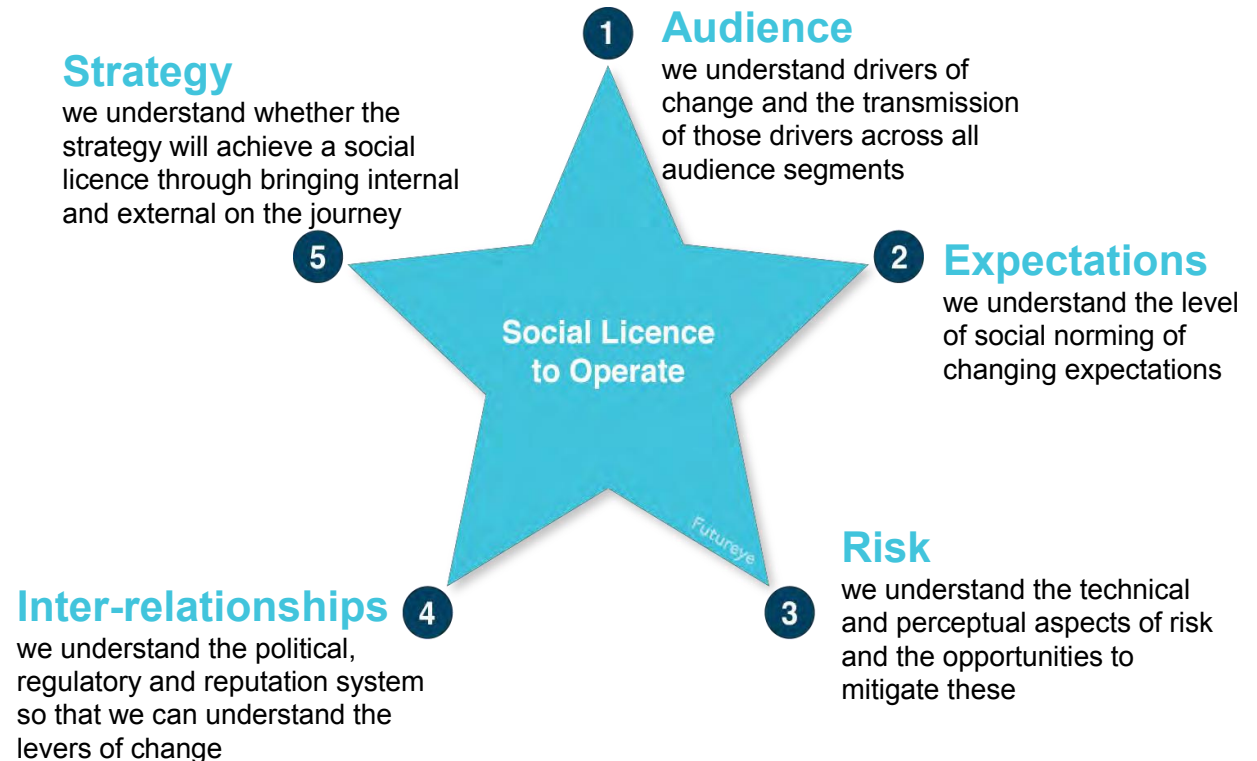




Appendix E – Methodology

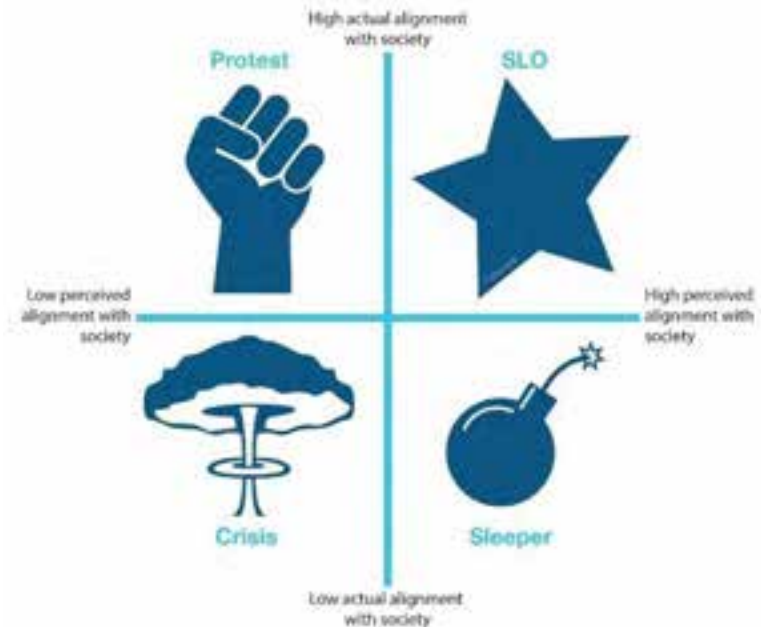
Futureye's Social Licence to Operate Methodology

Futureye's approach uses a bespoke methodology, backed by half a century of psycho-social research, to produce effective social licence outcomes. It takes the best aspects of the traditional model, filters in the latest communications and management theories, and combines it with robust diagnostics to provide the tools that will future-proof your operations.



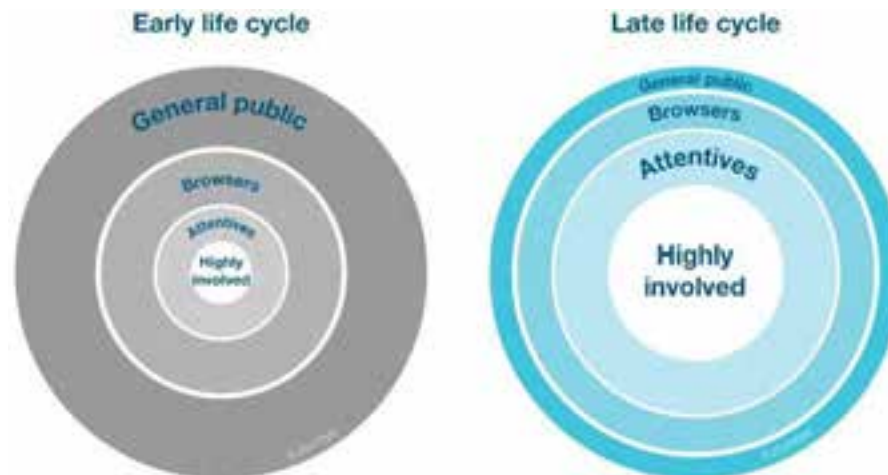
Our social licence definition

A social licence is the implicit acceptance of your product, service, company and government. To retain this acceptance requires ongoing alignment to society's values, paying attention to their concerns and resolving issues. When it comes to a new product it is possible to anticipate the 'social licence' risks and how to manage it proactively via positioning, culture, leadership and risk communication. You're earning social licence when your potential critics are satisfied that you've governed the research and development effectively, reduced risks, transparently managed issues, been accountable and been engaging. Without this process, the emotional reactions (i.e. outrage) of individuals, community and society causes rampant litigation risk, regulatory risk and safety risk.



Segmenting audiences to prevent the spread of criticism

Every issue of public concern has a life cycle, with different groups of people becoming interested at different points. As an issue matures, the highly involved audience will grow. By identifying highly involved audiences, what they are saying, and who is listening to them, early in the lifecycle, you can understand, not only what the key issues are likely to be in future, but also test how to mitigate the concerns.

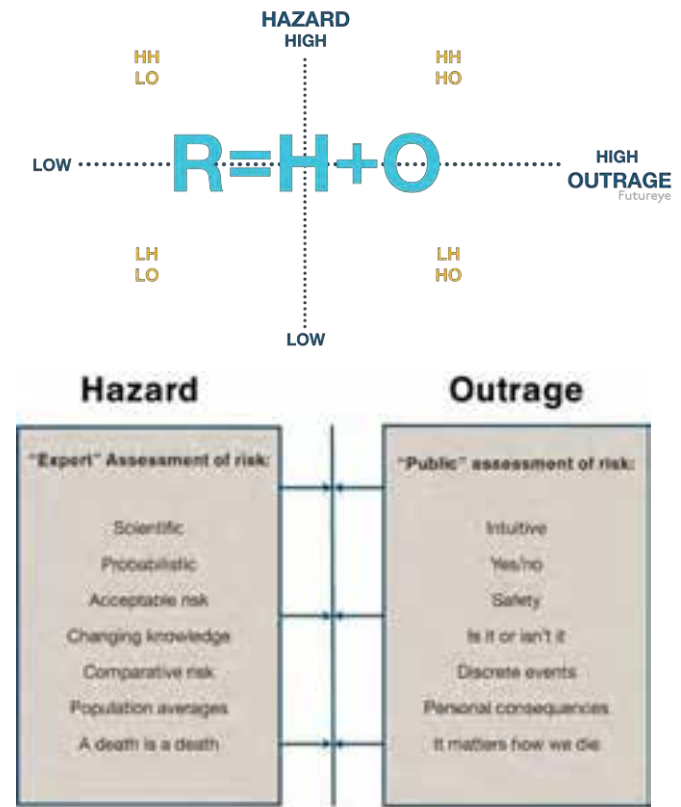


Understanding the gap between technical risk and public perceptions

Experts and the public make decisions about risk in very different ways. To experts, risk is scientific, probabilistic, and comparative. To the public, risk is instinctive and personal. Importantly, these two elements of risk are barely correlated, which explains why the public may have negative reactions to something which, from a technical perspective, presents very little risk, or may even be of benefit to them.

This division of the technical and the emotional flows on to the way the public engage in public issues, and explains why often the public's reaction to an issue is not based on a factual assessment of the risks and benefits.

Futureye uses the **Risk = Hazard + Outrage** equation to define and analyse risk. This equation emphasises that risk can be driven by feelings of outrage alone, even where there is no evident hazard.



These and other contrasts constitute barriers to mutual understanding.

There are 12 factors that determine outrage for each social licence issue



1. Control *Who has the control in this situation?*



2. Trust *Do we trust the key players?*



3. Responsiveness *How responsive are those perceived to be responsible?*



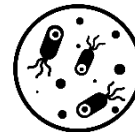
4. Fairness *Who gets the risk? Who gets the reward with this issue?*



5. Certainty *Do we know what could happen?*



6. Moral relevance *Is this an issue where there is a moral or ethical component?*



7. Familiarity *Was I informed of this issue or did I find out myself or from others not directly involved?*



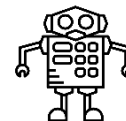
8. Memorability *What has happened before with this issue/ company/ situation?*



9. Dread *How bad could this issue get?*



10. Catastrophic potential *Is there a potential for a catastrophe?*



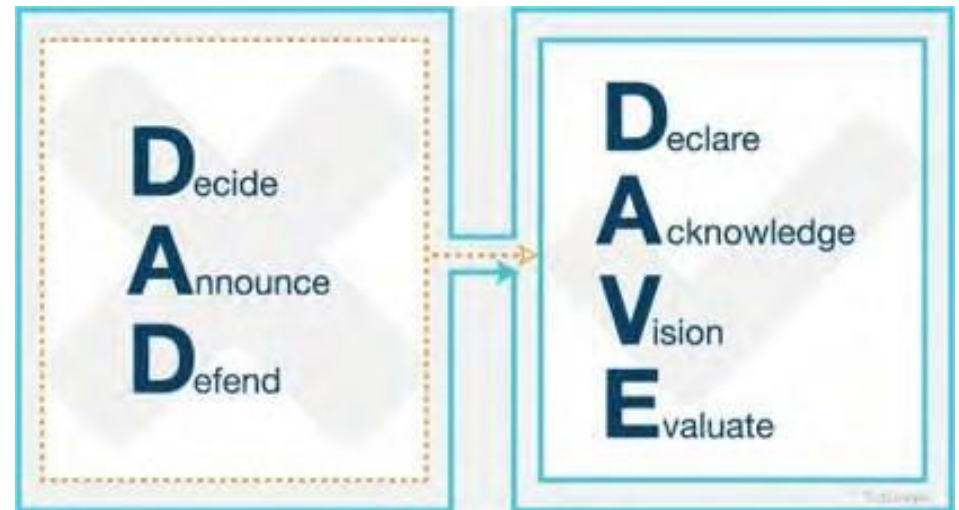
11. Natural vs Artificial *Is the issue a natural or artificial (man-made) one?*



12. Voluntariness *Am I given a choice in my involvement in the issue?*

Shifting from D.A.D to D.A.V.E

The DAVE concept is a communications strategy that reduces outrage. Traditional messaging takes what we refer to as the 'DAD' approach; Deciding internally the best action to take, Announcing the decision, and then Defending against any negative reactions, which risks aggravating audiences and increasing outrage due to a lack of engagement, which leads audiences to feel ignored and disregarded.



Using the DAVE approach, an organisation Declares the dilemmas it faces; Acknowledges the current and past problems; creates a shared Vision with key stakeholders; and in a way that the public and critiques can Evaluate the progress towards that vision. Through this approach, it is possible to make dilemmas visible and share responsibility. The result is a deliberative facilitated engagement, rather than a one-way defensive message.

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