

AUSTRALIAN EGG INDUSTRY COMMUNITY RESEARCH REPORT

2021



CITATION

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INTRODUCTION

Australian Eggs is committed to engaging with the views of the Australian community regarding the egg industry, its practices, and its position in Australian society. Over the last four years, 32,980 community members have completed surveys in this community research program, shaping the thinking and action of the egg industry in Australia.

Australian egg farmers produced 6.22 billion eggs in the 2018-2019 financial year, with per capita egg consumption continuing to increase year on year since 2015¹. The Australian egg industry is important to the lives of Australians and many Australians consume eggs and egg-based products every day. Therefore, it's important to gauge community attitudes towards the issues that matter most for the egg industry to maintain its position with the Australian community, and how community sentiment may have shifted over time to inform the egg industry's decision making.

This 2021 report builds on three years of previous research by CSIRO and explores the current position of the egg industry within the Australian community, addressing the focal points of the Australian Egg Sustainability Framework including animal welfare, envi-

ronmental impacts and economic viability of the egg industry. This report also includes community attitudes and opinions towards food security, nutrition, food traceability and research and development initiatives within the egg industry.

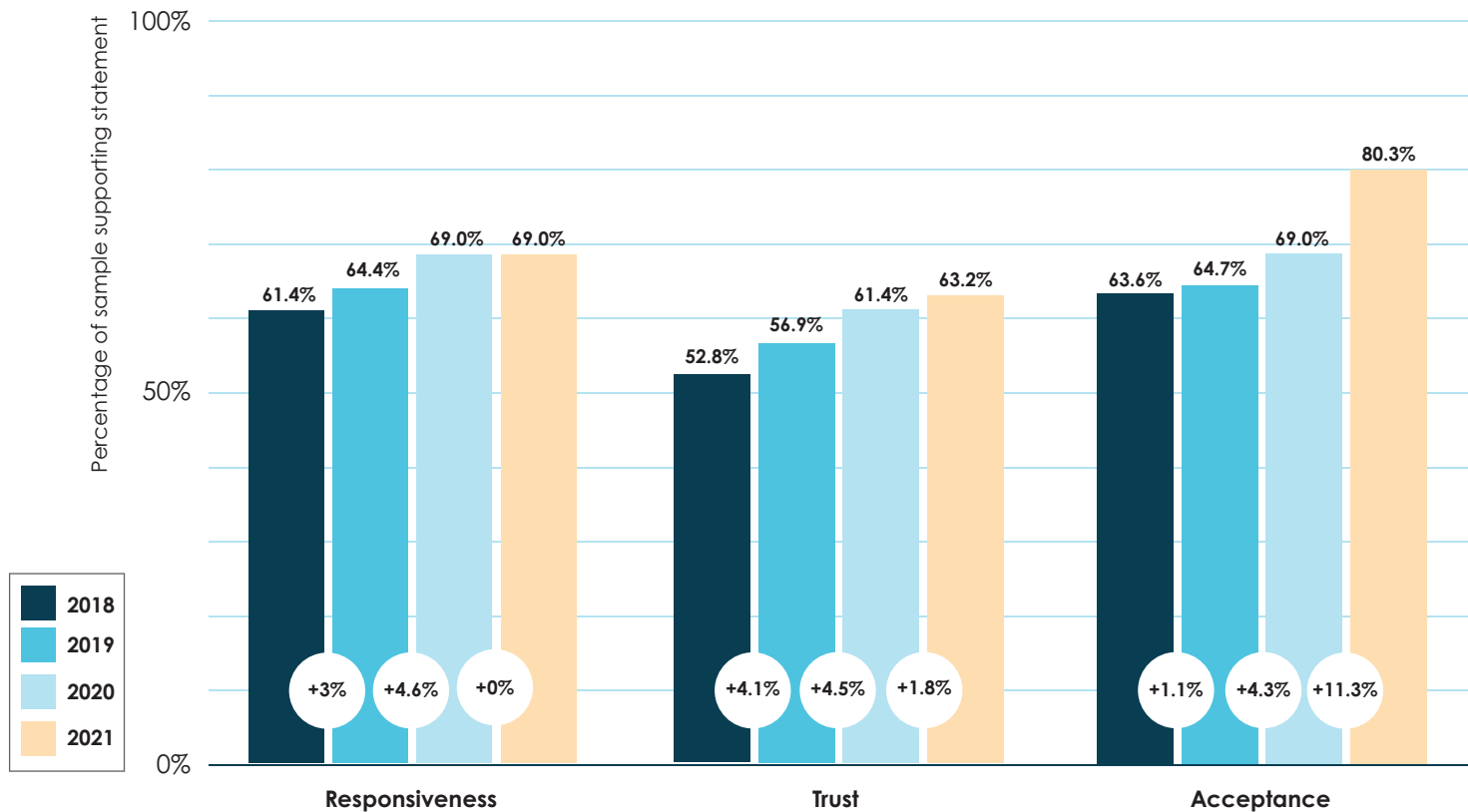
A key principle in this research and in the Australian Eggs Sustainability Framework is transparency, which is shared by both Australian Eggs and Voconiq. The findings will be published on Voconiq's website (voconiq.com/eggs) and separately on the Australian Eggs website (www.australianeggs.org.au/what-we-do/sustainable-production/sustainability-framework).

Together, the research by CSIRO and now Voconiq, a CSIRO spin-out research company, represents an authoritative and unique data resource within Australian agriculture. As the results described in this report show, the relationship between the egg industry and the Australian community is dynamic and can be systematically developed with focused engagement and industry responsiveness.

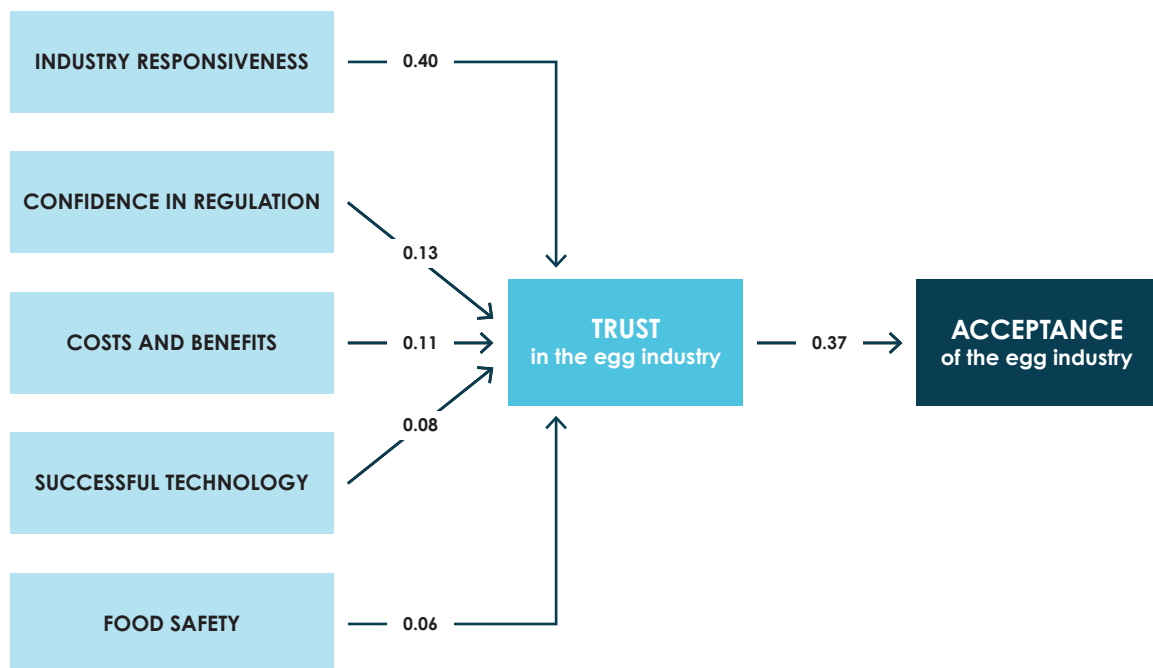
¹ Australian Eggs, Australia's Egg Industry: Everything You Need to Know, accessed 2 July 2021. <https://www.australianeggs.org.au/egg-industry?gclid=CjwKCAjw34n5BRA9EiwA2u9k34OOBQTtYCdzR8DNIR>

KEY STATISTICS

Responsiveness, trust and acceptance for the Australian egg industry



Key drivers of trust and acceptance of the Australian egg industry



PARTICIPANTS IN 2021

4,939

Representative sample

981

Open call sample

TOTAL PARTICIPANTS 2018 - 2021

20,373

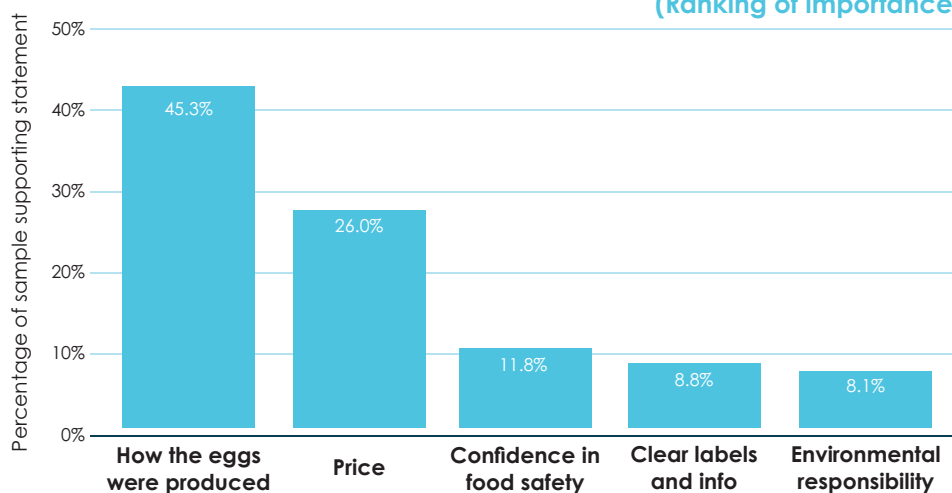
Representative of the
Australian population

12,697

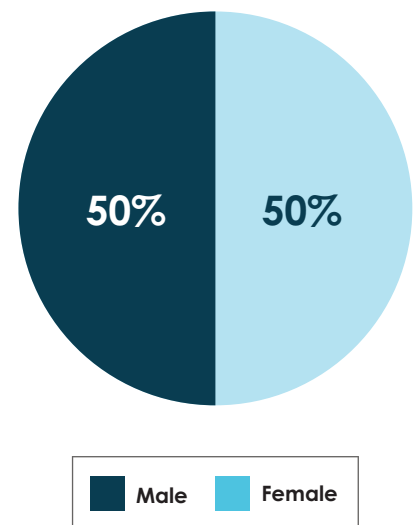
Open call samples

FACTORS THAT INFORM EGG PURCHASING DECISIONS

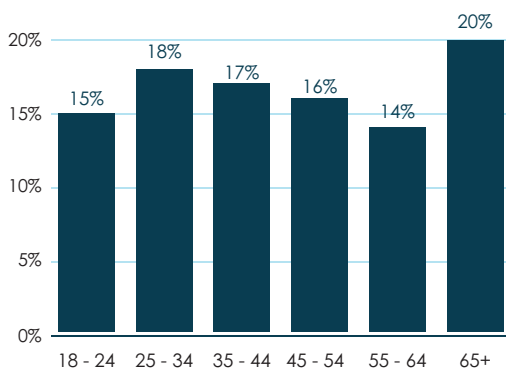
(Ranking of importance)



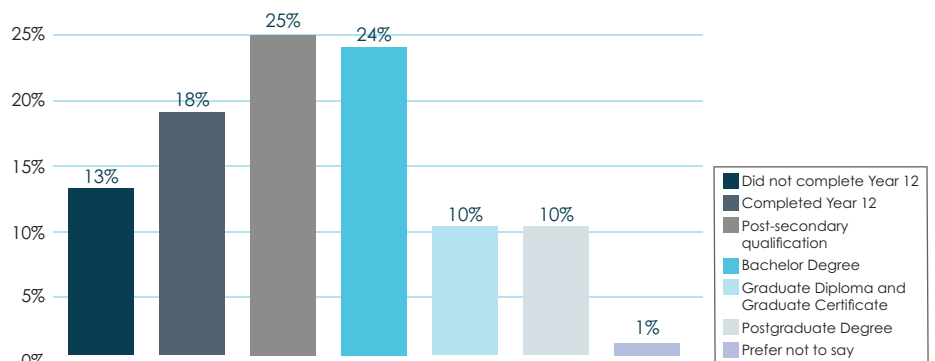
GENDER



AGE RANGE

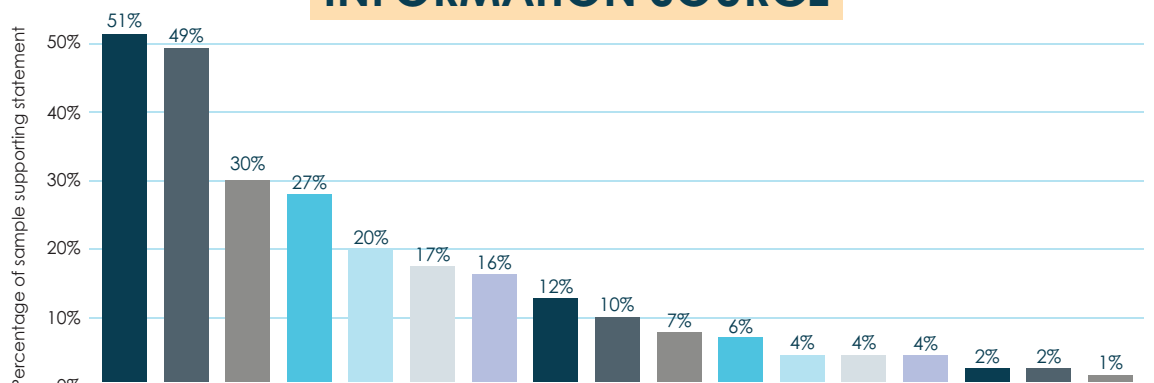


EDUCATION



INFORMATION SOURCE

- Internet
- Television - news
- Friends or family
- Television - current affairs programs
- Animal welfare groups
- Local newspapers
- National newspapers
- Radio
- State newspapers
- Social networks
- Colleagues
- Industry specific comms
- Community groups
- Industry associations
- Employers
- Influential individuals
- Other



THE RESEARCH PROCESS

The power of this research program comes from tracking key measures of community sentiment found to be important in predicting trust and acceptance of the egg industry, and in exploring new or topical issues in each year of the research process. In 2021, we worked to integrate and extend the key research priorities of the CSIRO program of community research.

The national community research program undertaken by CSIRO between 2018 and 2020 aimed to establish a deep understanding of community attitudes towards the Australian egg industry, track and compare key measures relating to community attitudes, trust and acceptance of the Australian egg industry over time, and explore any additional emerging issues (e.g. COVID-19).

In 2021, Voconiq worked to integrate and extend the key research priorities of the CSIRO program of community research by:

- repeating key measures from the 2018, 2019 and 2020 surveys,
- exploring emerging issues in greater depth (e.g. COVID-19 and food security, food traceability), and
- exploring community attitudes towards research and development initiatives by the Australian egg industry.

The content of the 2021 survey included:

- measures of participant demographic characteristics
- background knowledge of the egg industry
- the lives of people internal and external to the egg industry
- animal welfare
- environmental impact
- economic viability
- governance and regulation
- COVID-19, including food security and traceability
- trust and acceptance of the egg industry in Australia.

In addition, participants were shown five case studies relating to research and development projects within the Australian egg industry with the aim of evaluating the extent to which actions the egg industry has taken in response to community feedback informs community attitudes.

All participants read information about the study and needed to indicate that they understood the research aims, funding source for the research (Australian Eggs), and how participant data may be used before proceeding. The following industry definition was also included, consistent with previous iterations of the research:

"The Australian Egg Industry includes egg farming businesses that keep laying hens to produce eggs for consumption by the Australian community. The industry includes very large egg farming businesses that have a large flock of hens across a number of farms, medium and small egg farming businesses. Large and medium egg farming businesses generally have more than one egg production system (cage, barn, free range) and small egg farmers generally have one egg production system. Eggs and egg products (liquid egg) are sold to major retailers (supermarkets), other retailers, farmers markets, food service companies (cafes, restaurants), hospitality (hotels) institutions (aged care facilities) and food manufacturers (bakeries)."

SAMPLING METHOD

Voconiq collected two samples of data, both using the same online survey instrument. The first was a nationally representative sample by gender and age according to Australian Bureau of Statistics (ABS) data². The target sample size each year for this group is 5000. The representative sample is collected via a research panel provider and participants are paid a small amount for their time.

The second sample (n = 981) was collected by responses to a web link of the survey instrument published by Voconiq and Australian Eggs on their project web pages and through traditional and social media channels. The additional sample was collected to enable interested Australians to participate and share their views on the Australian egg industry and to ensure any Australian resident could contribute their views. Participants in both samples needed to indicate they were over the age of 18 years.

This report contains a summary of the data for the nationally representative sample. A full report including the responses to each question from the open, public sample is available on both Australian Eggs and Voconiq respective project web pages³.

ANALYSIS AND REPORTING

The survey data collection period was between 17th May and the 27th of June. Once the data was collected, statistical analyses were completed including a thorough data cleaning process. The data cleaning process involves excluding surveys from the analysis for various reasons such as missing data, brief completion times or responses that indicate carelessness or suspicious consistency (e.g. answering '1' to all questions).⁴

The analysed data is then written up in a report by Voconiq and published on both Voconiq and Australian Eggs respective project web pages.

COMMUNICATION AND ENGAGEMENT

A fundamental purpose for Australian Eggs in engaging Voconiq to continue this work is transparently demonstrate to all industry stakeholders and the Australian community that the industry is interested to understand and is listening to the views of the Australian community.

The data collected from the survey is used to inform the Australian Eggs annual Sustainability Framework and inform R&D program priorities. This annual process of listening and then actively responding to community expectations, experiences and perspectives maps directly on to a chief driver of community trust in the egg industry: its demonstrated capacity to hear and respond to community concerns.

Reporting the results of this community research therefore serves an important function: closing the loop with community members and demonstrating to industry stakeholders that it is meaningfully and transparently participating in a two-way conversation with community members regarding the current and future states of the egg industry in Australia.

²Australian Bureau of Statistics (ABS), Australian Demographic Statistics, Jun 2019, accessed 2 July 2021. <https://www.abs.gov.au/ausstats/abs@.nsf/0/1CD2B1952AFC5E7ACA257298000F2E76>

³[Voconiq link to public sample full report](#)

⁴In the 2021 survey, some changes to response scales were made to bring them in line with developments in survey design theory. Namely, labels were added to all scale points (instead of just endpoints), and some of the scale endpoints were updated (from 'Very much so' to 'Extremely'). While more intense scale endpoints tend to increase statistical validity by increasing the range of responses, setting a 'higher bar' (e.g. where a 5 means you 'Extremely' trust the egg industry vs 'Very much') can shift responses down. For this reason, we collected a companion sample of 439 participants using the same scales as in 2018, 2019, and 2020. After controlling for demographics, we found that the proportion of 'Agree' responses (above the middle of the scale) did decrease significantly for the 18 survey items with changed endpoints (by 11.7% on average). We thus performed statistical adjustments to the percentage agreement for these items to correct for the impacts of scale adjustments, to keep the outcomes comparable with prior years.

IMPORTANCE OF THE EGG INDUSTRY IN AUSTRALIA

Eggs play an important role in the lives of many Australians and community members also feel strongly that the egg industry plays an important role for the country. Across the four years of this research program, positive sentiment toward the position of the industry has increased.

A large percentage of the Australian community have consistently expressed positive sentiment that the egg industry is important to the country over the four years of the research program. In 2021, this sentiment continued with 89% of community members agreeing that the egg industry is an important part of the agriculture industry and 87% agreed that the egg industry is important to the Australian way of life (see Figure 1).

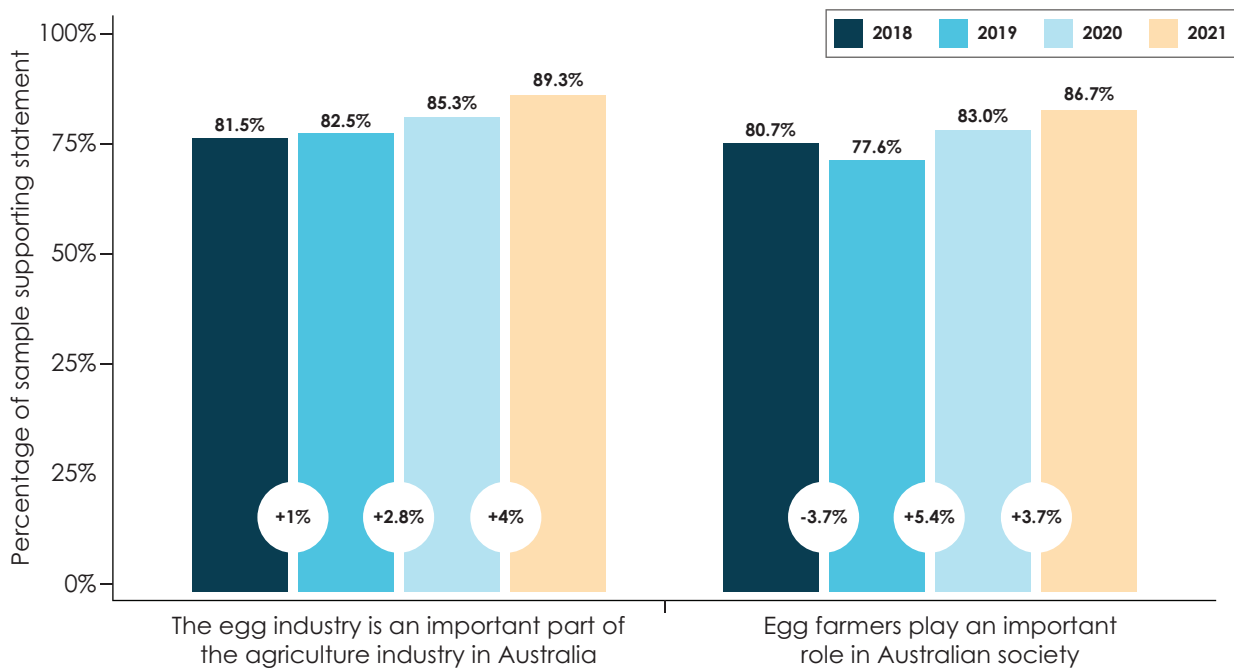


Figure 1. Percentage of agreement with importance items 2018-2021.



TRUST AND ACCEPTANCE OF THE AUSTRALIAN EGG INDUSTRY

The role of trust in the relationship that the Australian community have with the egg industry has been a central focus of this research program over the last four years. Trust has been found consistently to be a key driver of community acceptance of the egg industry, and as a key vehicle that translates community expectations and experiences of the industry into reported levels of acceptance. Levels of community trust are the product of these experiences and expectations.

Trust itself was measured in 2021 using three different questions, measured on a scale from 1 (Not at all) to 5 (Extremely). Since 2018, community trust in the Australian egg industry has increased significantly each year, leading to a corresponding increase in community acceptance of the industry in each of the four community surveys. Overall, the proportion of community members choosing “very much” or “extremely” in response to these three trust measures have improved from 53% in 2018 to 63% in 2021 (see Figure 2 for individual item responses).

Over the four years of the survey, the proportion of Australians that conveyed high levels of acceptance of the Australian egg industry (i.e. selecting “Very much” and “Extremely”) has also increased, moving from 64% in 2018 to 80% in 2021 (see Figure 3). The extraordinary increase in acceptance in 2021 is likely a combination of increased trust and COVID-19 related factors (discussed later in this report).

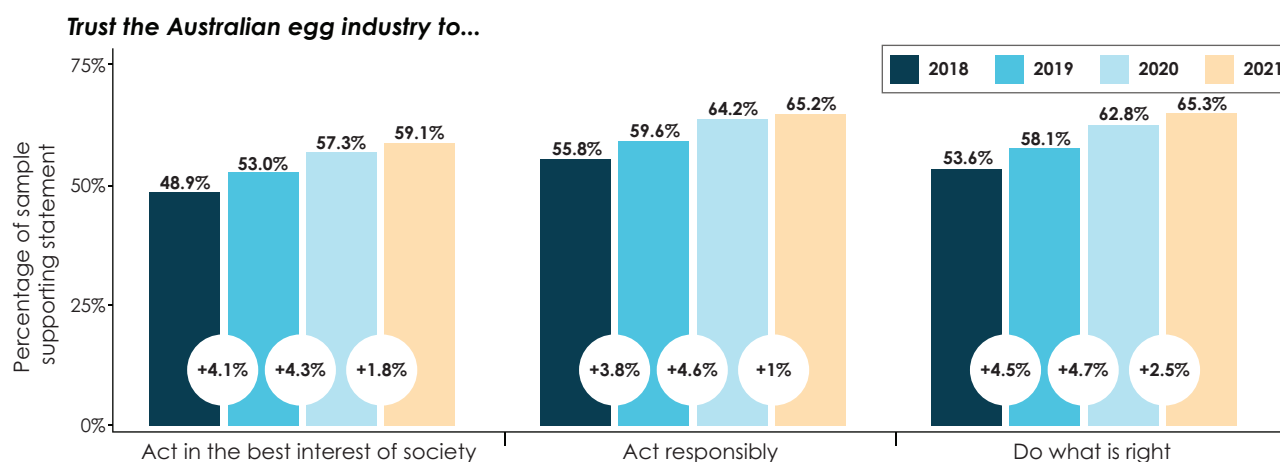


Figure 2. Percentage of agreement with individual trust items 2018-2021.

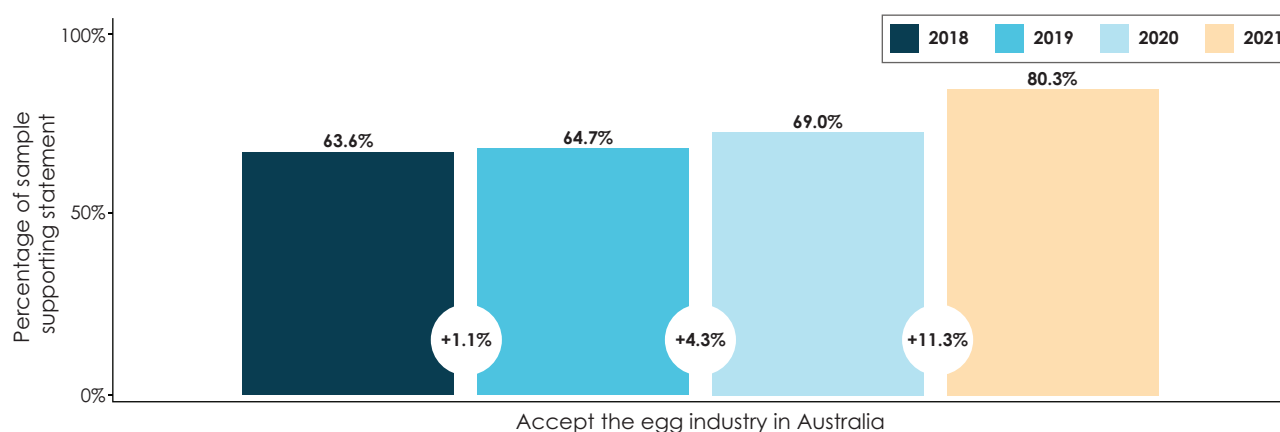


Figure 3. Percentage of agreement with acceptance of egg industry item 2018-2021.

WHAT LEADS TO TRUST IN AND ACCEPTANCE OF THE EGG INDUSTRY IN AUSTRALIA?

Each year in this research program, defining the pathways of community trust to trust in and acceptance of the egg industry is a cornerstone analysis. It helps Australian Eggs to understand in which areas to focus their work to improve the relationship with the Australian community and how to prioritise activity in line with what matters most to community members.

In 2021, path analyses revealed the key drivers of trust to be consistent with previous years, with one exception. The introduction of new measures examining the role of technology in delivering beneficial sustainability and operational outcomes for the egg industry proved important, with this set of questions emerging as a significant driver of increased trust among community members (see Figure 4). As in previous years, trust was a very strong driver of acceptance in this modelling.

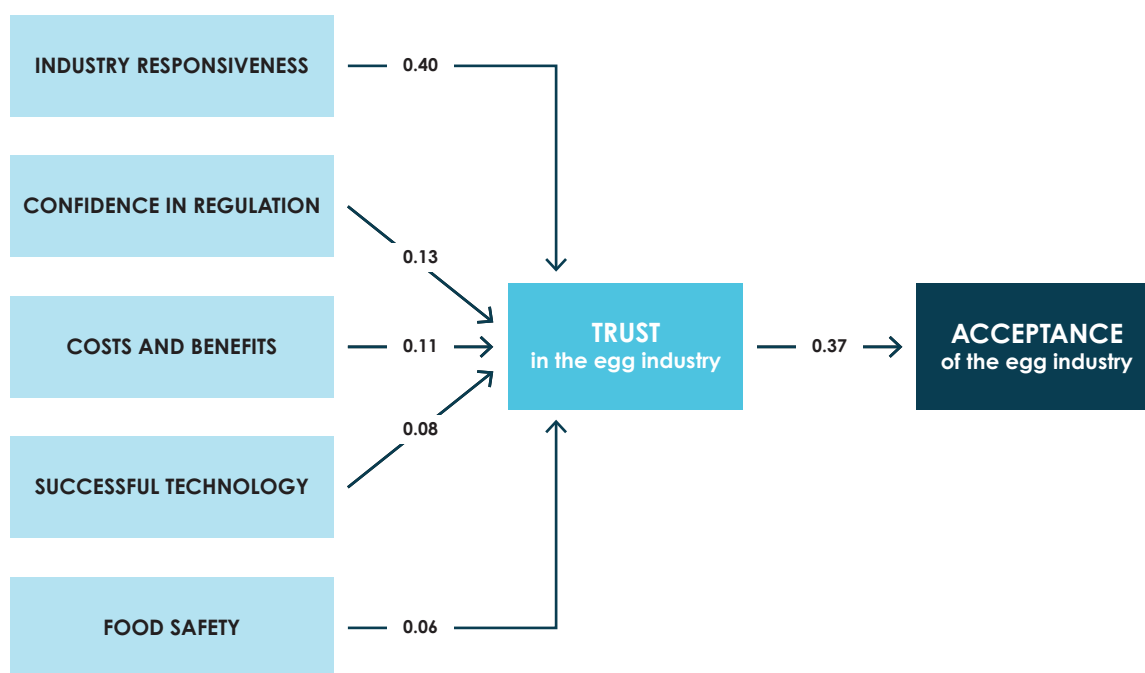


Figure 4. 2021 egg industry trust model.

HOW TO INTERPRET THIS PATH MODEL

A path model shows how all included variables relate to each other. In this path model we are exploring what leads to trust and acceptance of the Australian egg industry, shown by the navy arrows. The numbers represent the strength of the relationship between two variables, relative to all other relationships in the model. For example, industry responsiveness is a stronger driver of trust than confidence in food safety.

INDUSTRY RESPONSIVENESS

Industry responsiveness is a key driver of trust in the egg industry as it is for other agriculture and resource-based industries in Australia. Industry responsiveness has remained the strongest driver of trust in the egg industry over the four-year research program. The majority of Australians (68.2%) in 2021 agree that the Australian egg industry listens to and respects community decisions. Community sentiment that the egg industry is responsive to their concerns has remained stable in 2021 (see Figure 5).

CONFIDENCE IN REGULATION

This driver incorporates measures that capture how much Australians believe that the egg industry 'does the right thing' and that the industry is regularly and effectively audited. Greater levels of public confidence that there are checks and balances ensuring the industry operates properly leads to greater levels of trust. Ratings on these measures improved in 2021 (see Figure 6).

COSTS AND BENEFITS

This driver captures the extent to which the benefits of the egg industry in Australia (e.g. economic contribution of the industry and nutritional value of

eggs) outweigh the negative impacts of the industry (e.g. environmental impacts). Ratings on this measure improved between 2020 and 2021 (see Figure 7).

INNOVATION THROUGH TECHNOLOGY

The 2021 survey captured a new driver of trust incorporating measures related to the deployment of new technologies to improve sustainability and operational outcomes for the egg industry (e.g. hen welfare, environmental sustainability). Where community members view innovation through deployment of new technologies as positive the more trust they have in the egg industry as a whole. This driver is explored further later in the report.

FOOD SAFETY

Confidence in food safety within the egg industry is a key trust driver and an important factor in expressed preferences informing egg-purchasing decisions. Community confidence in the egg industry to produce eggs that are safe has remained consistently high through the course of the four-year research program. This driver is also explored further in the report.



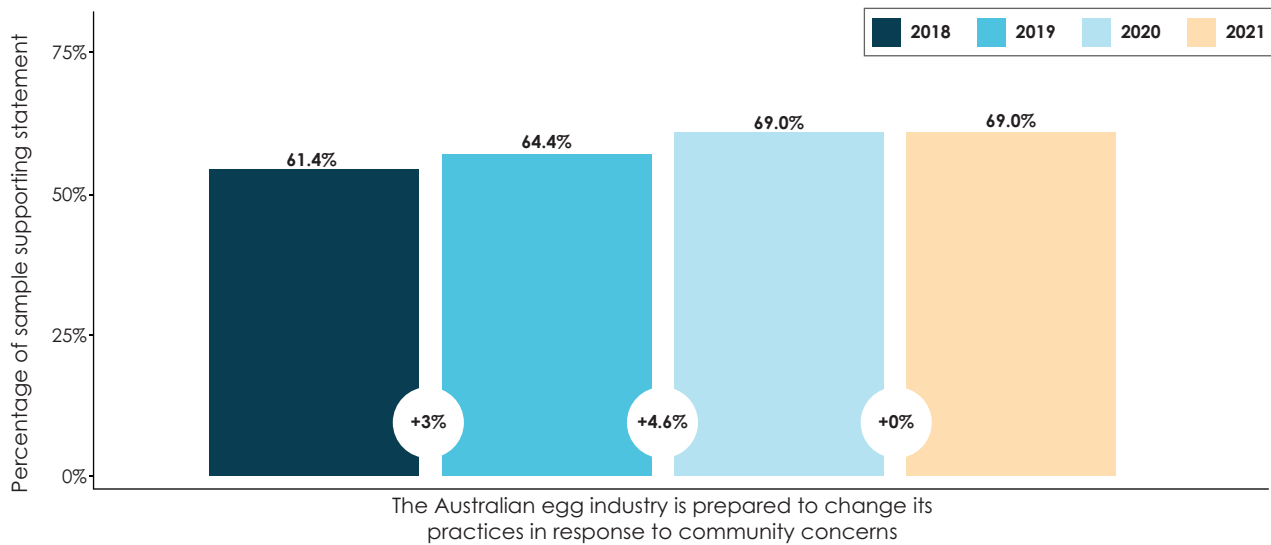


Figure 5. Percentage of agreement with responsiveness of egg industry item 2018-2021.

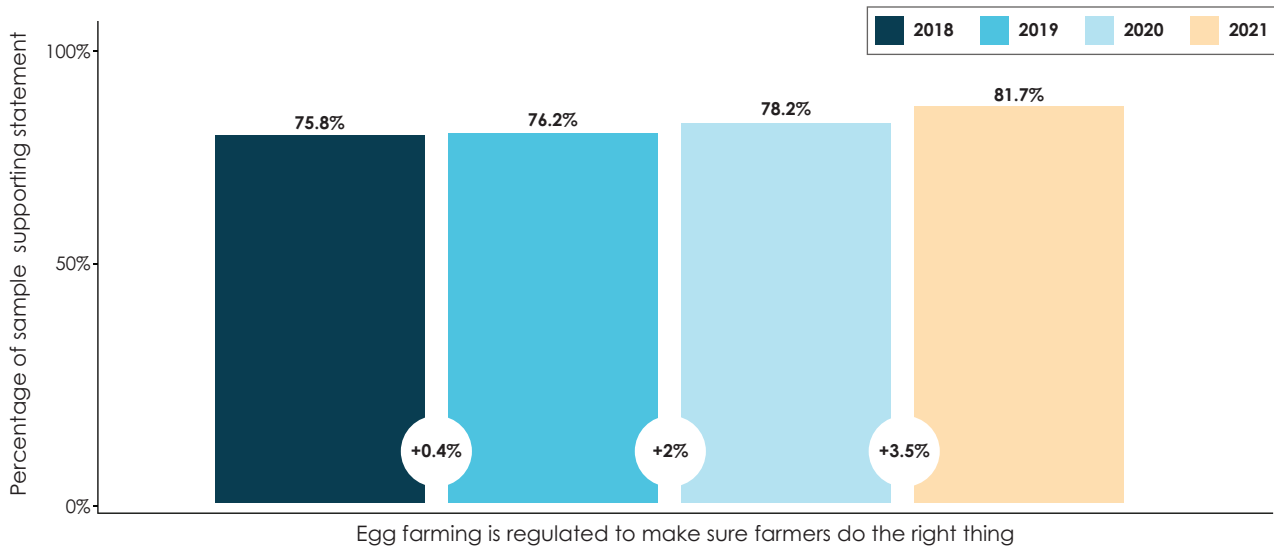


Figure 6. Percentage of agreement with regulation of the egg industry item 2018-2021.

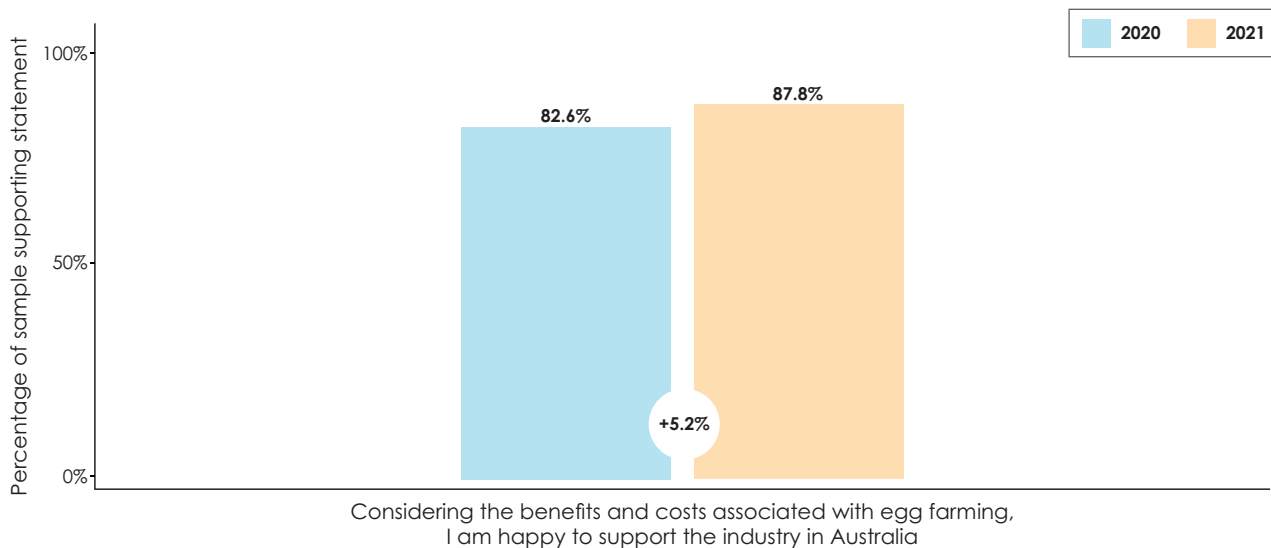


Figure 7. Percentage of agreement with costs and benefits of egg industry item 2020-2021.

HAS THE EGG INDUSTRY IMPROVED?

In 2021, the fourth year of the research program, we wanted to gauge Australian community sentiment on whether the egg industry had improved over time on four key issues, hen welfare, sustainability, nutrition and food safety.

HEN WELFARE

Australians increasingly agree that hen welfare is not just the absence of harm, and that it is important for hens to engage in natural behaviours. More than three quarters of Australians agree or strongly agree that egg farmers need to improve the living conditions of their hens and this number has remained relatively stable since 2019. However, in 2021, only 56% of Australians agreed that egg prices would need to increase to improve the welfare conditions for hens, a slight decrease from previous years. This reflects the complexity in the perceptions of welfare as there can be trade-offs between animal welfare and other costs and benefits. However, in the 2021 survey, there has been an increase (from approximately 82% across 2018-2020 to 87.8% in 2021) in the proportion of Australians who support the egg industry, with consideration to the costs and benefits. Overall, a large proportion of Australians (79.1%) agree that the egg industry maintains higher standards of hen welfare than it used to.

NUTRITIONAL VALUE OF EGGS

The proportion of Australians agreeing that eggs are an important source of nutrition has been very high in previous years and increased in 2021 to 93% (see Figure 8). While eggs are consistently recognised as a healthy source of nutrition, the industry continues to adapt to new contexts as consumer trends shift. For example, Australia is considered one of the fastest growing vegan markets in the world⁵ and the research conducted as part of this project reveals that a growing minority of Australians agree that plant-based protein is starting to replace eggs as a staple food in Australia (34.1% in 2020 and 37.3% in 2021). Despite this, Australians are buying eggs in greater numbers each year¹, which indicates there may be a greater awareness of the potential for plant-based proteins as substitutes for eggs, rather than plant-based proteins actually replacing eggs as a staple food. The 2021 survey revealed that 69% of Australians see eggs as a better source of nutrition than they used to.

FOOD SAFETY

Community confidence in the egg industry to produce eggs that are safe has remained consistently high over the research program. Confidence in food safety within the egg industry is also a key driver of trust and an important factor in the purchasing decisions of the community. Pathogenic bacteria, such as Salmonella, are commonly associated with the contamination of eggs and implicated in foodborne disease outbreaks. In part, due to the strict food safety standards of the egg industry and food regulatory bodies, Australians experience a high level of food safety in comparison to other developed countries. After a serious food safety threat relating to Salmonella Enteritidis⁶, an organism not commonly found in Australia, the egg industry committed to developing a program that incorporates improved traceability to ensure the biosecurity and food safety of the industry and community in the future. Evidently, public confidence that the food safety standards within the egg industry can protect them from outbreaks has retained a strongly positive position and most Australians are more confident in the food safety of eggs than they were in previous years (see Figure 10).

ENVIRONMENTAL SUSTAINABILITY

In the 2021 survey, we saw a drop in the proportion of Australians that agree egg farming has a lower impact on the environment than other industries (77.7% in 2020 to 73.4% in 2021). Community sentiment that egg farming is a "good use of land" has continued to increase each year of the research program (see Figure 9), indicating that Australians still see egg farming as a legitimate and environmentally sustainable activity. After four years of the research program, most Australians (70%) see eggs as a more sustainable choice than they used to.

⁵ Sydney Morning Herald, Australia is the third-fastest growing vegan market in the world, accessed 22 July 2021. <https://www.smh.com.au/business/consumer-affairs/australia-is-the-thirdfastest-growing-vegan-market-in-the-world-20160601-gp972u.html>

⁶ Food Standards Australia New Zealand (FSANZ), Salmonella Enteritidis (SE) linked to eggs, accessed 15 July 2021. <https://www.foodstandards.gov.au/consumer/safety/Pages/Salmonella-Enteritidis-linked-to-eggs.aspx>

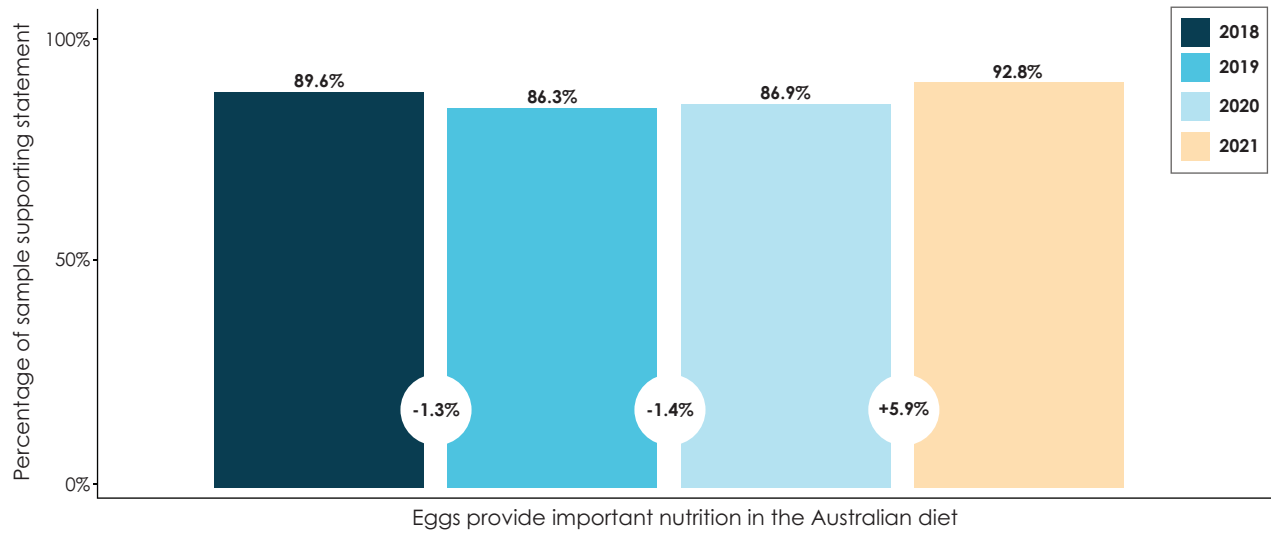


Figure 8. Percentage of agreement that eggs provide important nutrition 2018-2021.

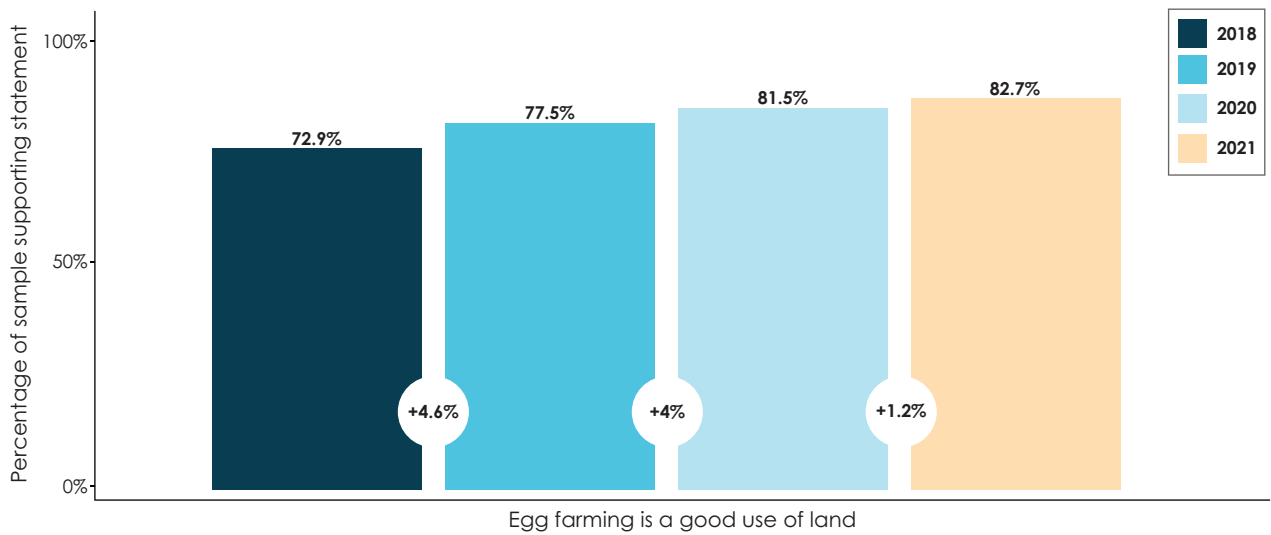


Figure 9. Percentage of agreement that egg farming is a good use of land 2018-2021

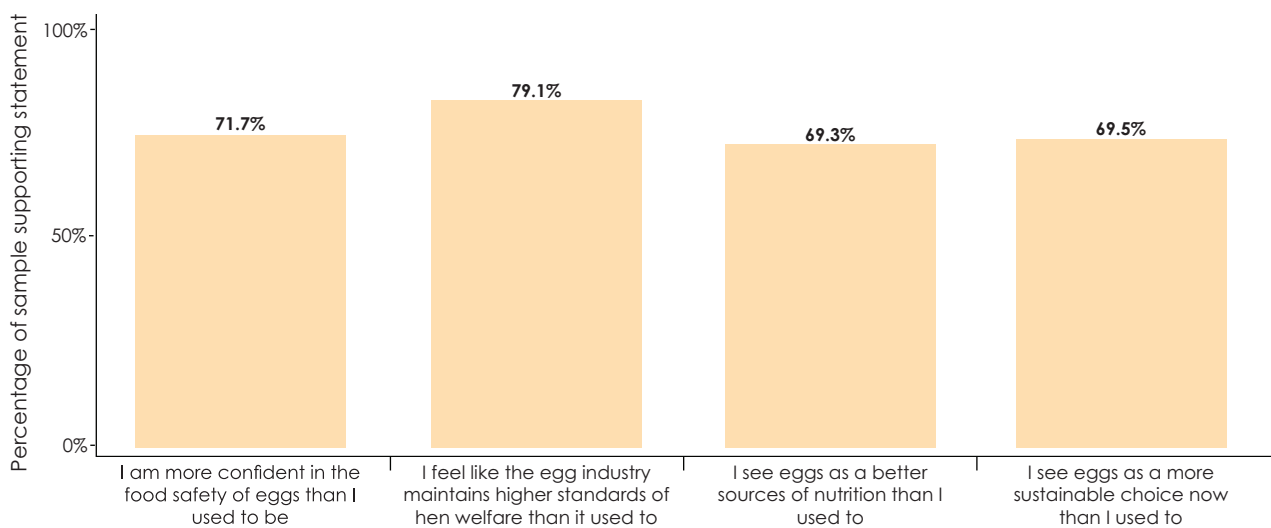


Figure 10. Percentage of agreement about eggs provide important nutrition items 2021.

EGG INDUSTRY INITIATIVES

Australian Eggs has worked with industry to develop initiatives around the key issues identified through this program of community research and community engagement related to its Sustainability Framework. In the 2021 survey, we asked Australians their opinions on several key research developments and examined the extent to which these activities have influenced community views about the industry.

TECHNOLOGY

More than three-quarters of Australians agree that financial sustainability supports innovation in the egg industry and this sentiment has remained relatively stable since 2019. The development of technology in improving the egg industry is also one of the more tangible ways the egg industry can demonstrate responsiveness to the concerns of the Australian community, which in turn contributes to trust and acceptance of the egg industry in Australia. New in 2021, we asked a series of questions about the use of new technology in key areas such as hen welfare, environmental impacts and sustainability. The Australian community expressed high levels of positive sentiment across all the 2021 technology questions (see Figure 12), suggesting community support of the use of new technology to help egg farmers improve their practices and the egg industry as a whole.

RESEARCH AND DEVELOPMENT IN THE EGG INDUSTRY

To further explore community attitudes to initiatives in the egg industry, Voconiq collected data on community attitudes towards five case studies on technology and research currently underway (see Table 1).

Australians expressed high levels of support for all five initiatives, expressing agreement that they were innovative and would have a meaningful positive effect on the egg industry (see Figure 11). The welfare management technology and farm sustainability dashboard initiatives showed the highest levels of community support. This reinforces the well-established understanding that animal welfare and sustainability in the egg industry are critical issues for Australians.



Table 1. Egg industry case studies shown to participants.

PROJECT NAME	SHORT DESCRIPTION
Carbon neutral project	A comprehensive carbon footprint assessment that provides egg farmers with a pathway to further reduce their carbon footprint and farm more sustainably. Although egg production already has a relatively low carbon footprint, the framework developed through this project will allow the industry to assess whether it is possible to achieve carbon neutrality and the steps required to pursue this.
Choline in pregnancy	The Australian egg industry is conducting research to explore the nutrition benefits of eggs as a source of choline to support foetal development. The research involves testing the impact of egg consumption on pregnant women to quantify the contribution that egg choline can make in improving human nutrition. This will allow doctors, nutritionists and dietitians to guide pregnant women towards the improved diets for foetal development.
Farm sustainability dashboard	The Farm Sustainability Dashboard helps to identify opportunities for egg farmers to improve sustainable practices across all aspects of their business. Egg farmers use the dashboard to create a farm profile confidentially and review their current activities against best practice to receive instant feedback and recommended resources relevant to sustainable practices. This allows egg farmers to consider improvements that could be implemented on their farm and lifts the overall sustainability of the egg industry.
Traceability software	The traceability software tool is being developed to help egg farms manage their business better by tracking egg movements across, to and from their farm. The software tool will guide egg farms to a process of capturing core traceability information in an efficient and low cost way. This will allow consumers to have confidence in the source of their eggs and ensure the industry can respond quickly to biosecurity, food safety and food safety incidents.
Welfare management technologies	'Machine vision' uses computers to automatically interpret video. As part of this research project, video footage of hens is recorded, and a library of hen behaviour developed so that abnormal behaviour can be detected automatically. The use of this technology would allow farmers to rapidly identify hens that are sick or exposed to greater risk through patterns of hen behaviour such as smothering. This is expected to improve the consistency of welfare outcomes across the industry through early detection and response to these and other welfare issues.

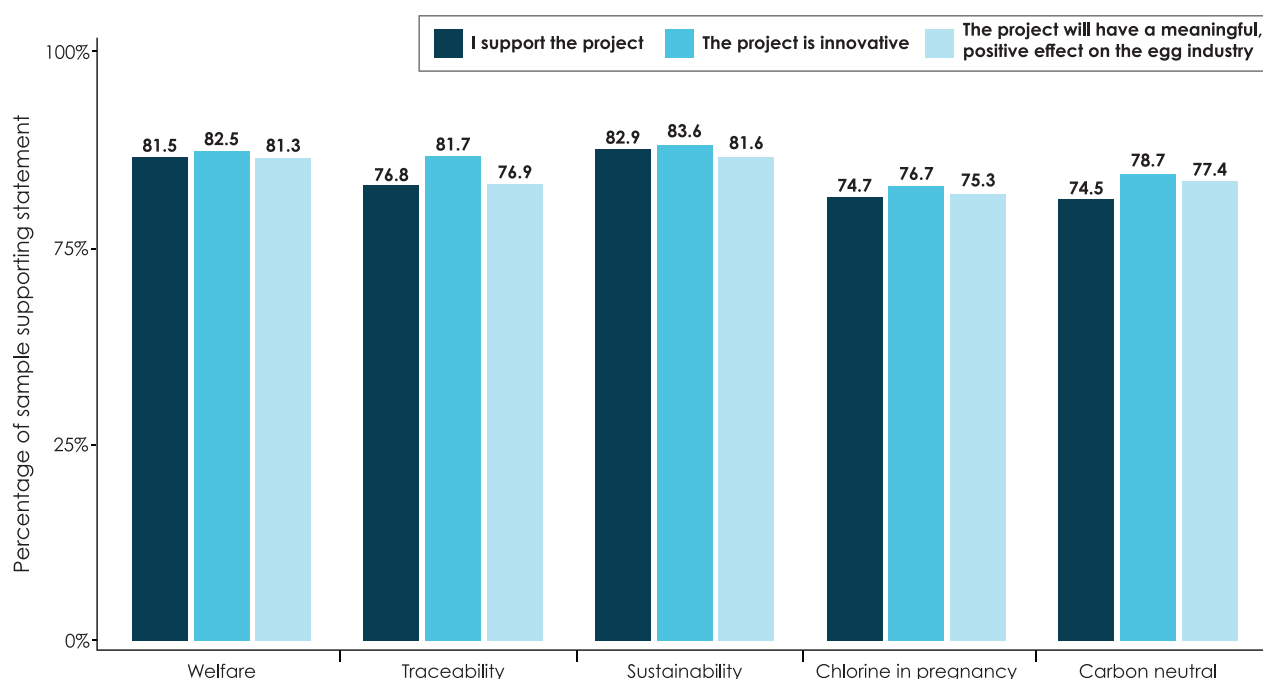


Figure 11. Proportion of agreement for each research and development project 2021.

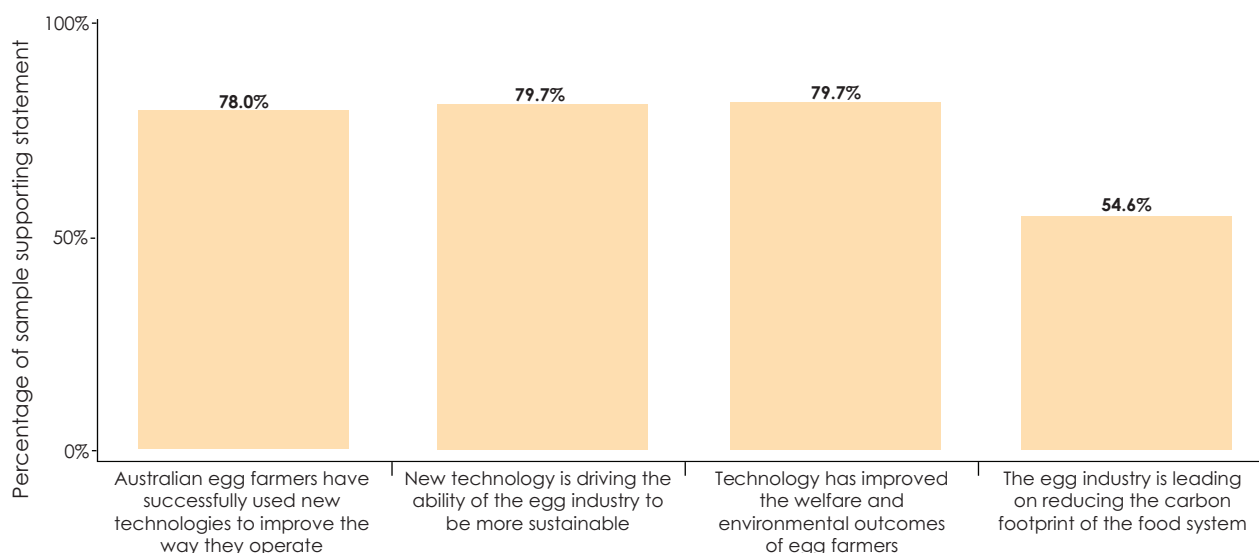


Figure 12. Proportion of agreement for egg industry technology items 2021.

TRACEABILITY IN THE AUSTRALIAN EGG INDUSTRY

Traceability is the ability to trace all processes from procurement of raw materials to production, processing, distribution, consumption and disposal. There is a global trend towards transparency and traceability in the food chain and an Australian consumer demand for food provenance⁷. Given the importance of traceability to the Australian community, we asked a series of questions in the 2021 survey relating to traceability. Most Australians prefer to buy their eggs from retailers that can trace their eggs back to the farm, that traceability is important to ensure food safety, and that consumers get what they pay for. The community also expressed high levels of agreement that labelling regarding egg production was important to them (see Figure 13). We know that providing transparent information about the egg industry contributes to building trust and that the Australian community care about where their eggs come from. The Australian egg industry is undertaking a Commonwealth grant project to identify and develop tools that can be made available to egg farmers to improve egg industry traceability. The traceability software tool is being developed to help egg farms manage their business better by tracking egg movements across, to and from their farm.

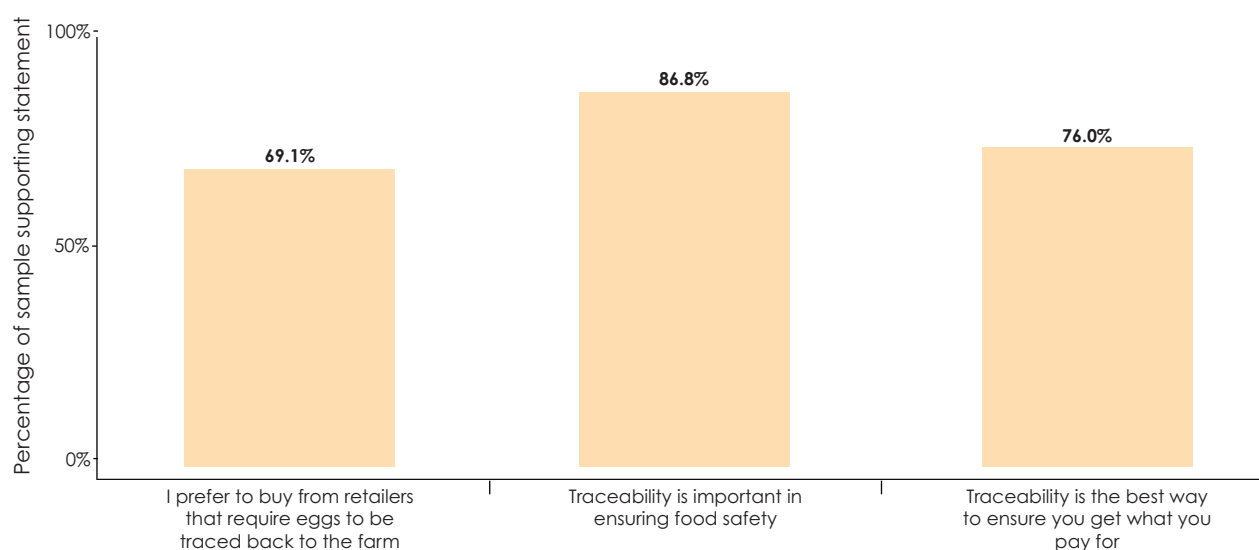


Figure 13. Percentage of agreement with traceability items 2021.

⁷ABC Rural, Interest in food provenance booming among young consumers, accessed 22 July 2021. <https://www.abc.net.au/news/rural/2016-04-15/nsw-youth-food-movement/7329880>

COVID-19 AND THE AUSTRALIAN EGG INDUSTRY

The timing of the 2020 survey coincided with one of the most challenging times in Australia as COVID-19 brought disruption to all of our lives. In 2021, we again included measures relating to COVID-19 to continue to document the impact that the global pandemic has on community attitudes towards the egg industry.

During COVID-19 lockdowns, purchasing limits were placed on food items that were considered staples at major supermarkets around Australia including flour, pasta, rice, sugar and eggs. This further highlighted, amongst other staples, the importance of eggs in the lives of Australians. Purchasing limits were put in place generally to ensure staple food items were available for all consumers amidst concerns 'panic buying' may lead to shortages⁸. Evidently, only 33.5% of participants agreed that Australia has plenty of food and were not concerned about food security, which could potentially have been influenced by the COVID-19 pandemic. Owning backyard hens also became popular during lockdowns which was reflected in the community data. The proportion of

the Australian community that said they owned their own hens increased from 8.2% in 2019, prior to the widespread introduction of COVID-19, to 9.3% and 11% in 2020 and 2021 respectively. Despite this, the egg industry was able to rise to the challenge and, although people were purchasing more eggs during the pandemic, the egg supply remained stable⁹. 70% of Australians agreed that the COVID-19 pandemic made them appreciate the efforts of farmers to produce food, and a high proportion of Australians agreed that producing eggs for Australia is an essential service in both the 2020 and 2021 surveys (see Figure 15).

⁸ ABC Rural, Egg producers who feared the worst adapt and flourish amid coronavirus pandemic, accessed 10 August 2021. <https://www.abc.net.au/news/rural/2020-10-09/egg-producers-dodge-a-bullet-during-coronavirus-pandemic/12739628>

⁹ Nine News, Shoppers scramble for eggs but supplies remain strong, accessed 10 August 2021. <https://www.9news.com.au/national/egg-supermarket-supplies-strong-coronavirus-panic-shopping-concern/62f6e869-2099-4caf-a753-d51f0c5aa825>

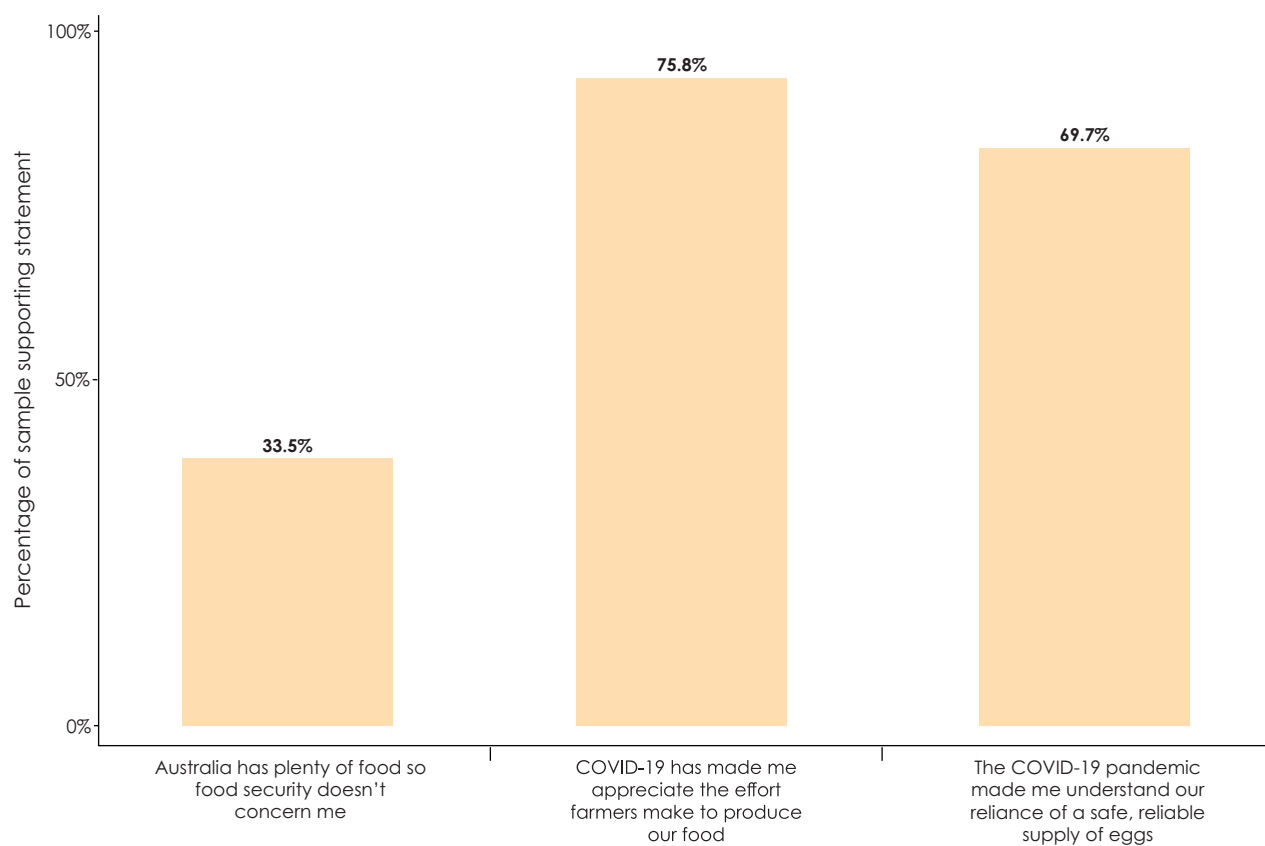


Figure 14. Percent of agreement with food security and COVID-19 items 2021.

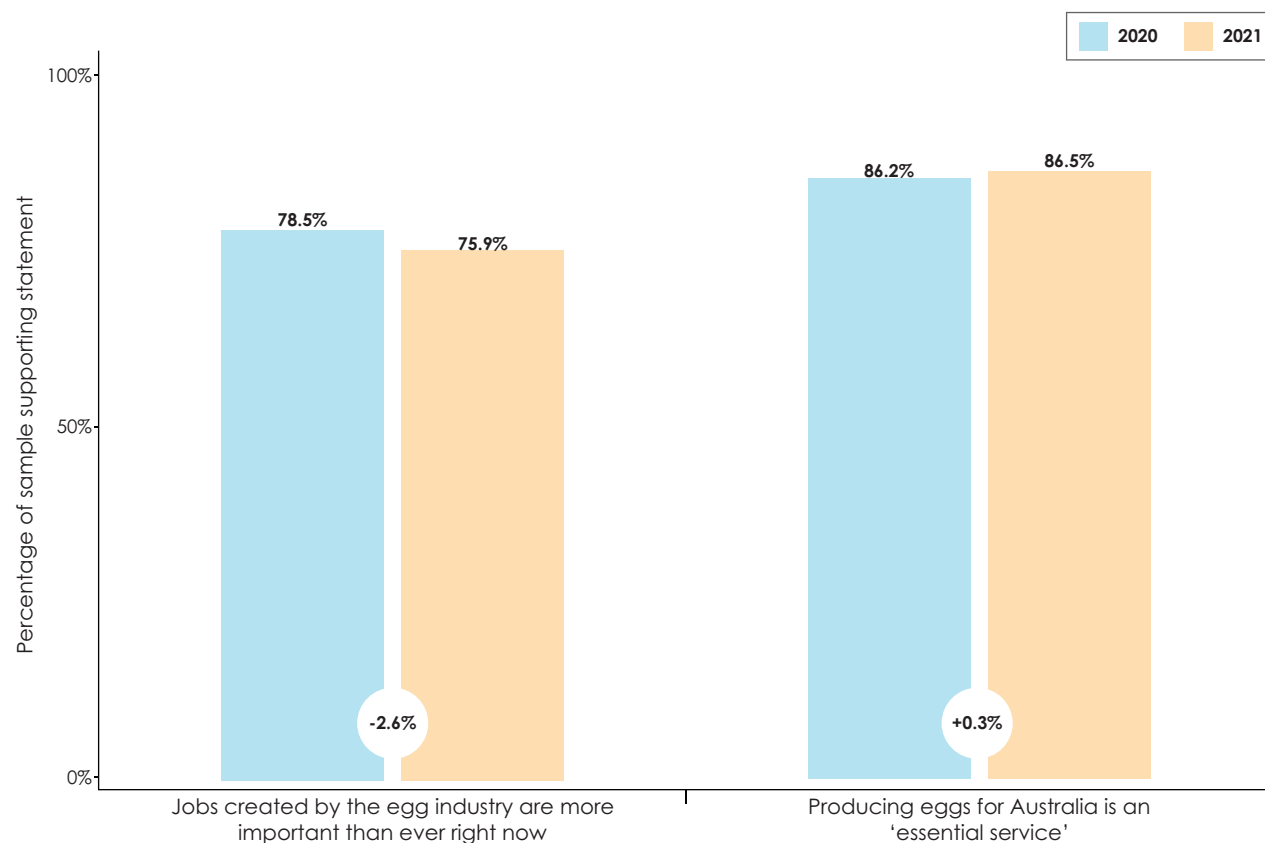


Figure 15. Percent of agreement with the importance of jobs in the egg industry and producing eggs as an essential service items 2020-2021.

CONCLUSION

This report provided a summary of the findings from a four-year program of research between 2018 and 2021. We explored the relationship between the Australian community and the egg industry to develop a deeper understanding of the nature of this relationship.

Over the four years of the research program, 32,980 participants have contributed their time and thoughts to help Australian Eggs develop a more constructive and productive relationship with the Australian community.

As the data has shown over these four years, responding to community concerns in a meaningful, structured, and transparent way has led to a stronger and more constructive relationship with the Australian community. Trust in and acceptance of the industry has improved year on year since 2018: a remarkable achievement.

Primarily, this has come from focusing on the key drivers of trust in the modeling conducted in each community survey. In 2021, we included items that explicitly examined community sentiment toward the research and development investments made by Australian Eggs in response to community concerns

identified through this program of work, such as the use of technology in the egg industry to address animal welfare, environmental sustainability and traceability.

These new items showed that Australians are highly supportive of the use of technology, research and development, and see these as direct, meaningful responses to issues of concern.

Animal welfare, sustainability, food safety and seeing the benefits of the industry outweigh its inevitable impacts remain important to Australians, of course. But this work has demonstrated that focusing on the mechanisms that underpin sound relationships, the key drivers of trust in the relationship like responsiveness and confidence in food safety standards, leads to positive and reinforcing feedback loops in the relationship with the community. Listening, reflecting, investing and measuring as a set of activities for the egg industry means they now have a platform of trust on which to continue innovating and shaping the trajectory of the egg industry in this country confident that the Australian community is willing to support them in doing so. This is not the case with all industries.



From here, it is likely that levels of trust and acceptance of the egg industry in Australia may stabilise rather than continue to increase – there are limits to the level of good will citizens can feel toward a set of industrial activities. The opportunity for the egg industry is perhaps not to see significant increases year on year in the future, but to use the knowledge of the mechanisms that underpin its trust-based relationship with community members to address emerging challenges for the industry.

As one example, environmental sustainability is an area that has been of acute focus for the industry over the four years of this current research program, yet the context in which this issue exists is rapidly shifting in its nature and rate of change. Focusing on environmental sustainability in the context of rapid and dramatic climate change using the tools for engagement honed through four years of focused research activity may offer the egg industry a point of clear differentiation and prepare it well for operating conditions that will undoubtedly shift in the years to come.

The 2021 survey also provided a unique opportunity to track the effect of COVID-19 on community attitudes toward the egg industry over time. Eggs on supermarket shelves provides comfort and

confidence to Australians in this time of uncertainty, as does the strong emphasis of the industry on providing a safe, nutritious and affordable product. These observations from data collected in 2020 and 2021 provide evidence, if any was needed, that planning well in good times pays significant dividends when times are difficult. It is challenging to build trust in a crisis, and this data reveals that working hard to establish a stronger relationship with community members, driven in no small part by public confidence in the regulatory context around eggs and the internal food safety standards and quality assurance processes, means that the egg industry is weathering this pandemic storm better than many other industries.

The egg industry has engaged tens of thousands of Australians in this program of research over the last four years and responded to their concerns and expectations through its sustainability framework, investments and reporting. The challenge for the industry now is the same as it was in 2018 – to strive to understand and respond effectively to the challenges that it faces through listening closely to the voices of the Australian community.

Voconiq has redefined the meaning of social licence to operate, helping customers to harness the relational mechanisms that underpin it. We are committed to helping communities and our customers build stronger, more reflexive relationships, with trust at their core.

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