



SOCIAL IMPACT STUDY OF RED MEAT PROCESSING IN AUSTRALIA

PROJECT CODE: 2017-1061

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DATE SUBMITTED: 11 August 2017

DATE PUBLISHED: 15 August 2017

PUBLISHED BY: Australian Meat Processor Corporation Limited

The Australian Meat Processor Corporation acknowledges the matching funds provided by the Australian Government to support the research and development detailed in this publication.

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1.0 EXECUTIVE SUMMARY

AMPC is committed to supporting its member organisations maintain their social license to operate (SLO). SLO is closely associated with the social impact organisations have on the communities in which they operate. AMPC therefore commissioned research to gain insights into how the decisions and behaviours of red meat processor (RMP) organisations were impacting on the communities in which they operate.

The social impact of the Australian RMP industry had never previously been assessed. Dr Kim Johnston and a team of researchers from QUT were commissioned to carry out a benchmark study to determine what social impact the RMP industry has on its host communities.

The research found the Australian RMP industry is perceived as having significant positive impacts on the communities in which it operates. RMP organisations report little or no community objections to their continued operations. This is an important indicator that these communities are currently granting SLO to the RMP industry. It further suggests that maintaining the positive nature of these social impacts is likely to result in continuing community approval and an extension of SLO. However, the research also found lower rates of approval of the RMP industry among people who were not even aware they had a RMP organisation in their neighbourhood. Low community approval levels of organisations have been shown to potentially pose a threat to the continuation of SLO. The conclusion the researchers drew from this finding is that community awareness of the positive social impacts of the RMP industry is a key precursor to achieving and maintaining its SLO.

The conclusion of the research project is that to continue to renew its SLO on a daily basis as required, the RMP industry needs to maintain its positive connections with local communities. AMPC could encourage RMP organisations to invest in these connections by sharing members' community engagement success stories through its internal communication network. Recognising those organisations that achieve outstanding social impacts – perhaps through an award scheme – could both provide stories to be shared, and incentivise efforts to expand and improve suitable initiatives. In addition, the industry – represented by AMPC – needs to get better at telling the story of its positive social impacts to a wider audience. This could be achieved, for example, by the use of case stories on the organisation's website.

In summary, the QUT research team believes the RMP industry can continue to renew its SLO through a combined program of positive community engagement, and better conveying the story of its successes to internal and external audiences.

Project Outcomes

Project 2017- 1061 delivered four tangible outcomes:

- // A new and unique way to measure the social impact of the RMP industry in Australia.
- // A benchmark of the social impact of the Australian RMP industry.
- // Six case studies that document the social impact of the RMP industry in specific Australian communities.
- // Recommendations to AMPC on how to communicate more effectively about the social impact of the RMP industry.

2.0 INTRODUCTION

As the peak professional body for the RMP industry in Australia, AMPC has a stated organisational goal of supporting its members by providing “research, development and extension (RD&E) services that improve the sustainability and efficiency of the sector”. A key element in sustaining the successful operations of the RMP sector is the maintaining and enhancing of the industry’s social licence to operate. All organisations need the ongoing – usually tacit and implicit – permission of the communities in which they operate to continue their work: this is referred to as a social licence to operate (SLO). Of particular significance is the fact that community permission for organisations to continue their operations can never be said to be permanently achieved: SLO must be renewed on an ongoing, perhaps daily, basis.

SLO requires particular attention in industries where there is an element of sensitivity or potential controversy in relation to the production methods or outcomes involved. Any aspect of an organisation’s operations that might negatively impact on its relationship with the host community needs to be identified and researched, as such impacts could jeopardise the community’s willingness to renew the SLO. The concept of social impact is therefore very closely linked to that of SLO. The social impact of an organisation and/or its industry needs to be assessed to identify potential threats to the ongoing renewal of SLO before any response or mitigation strategies can be developed.

The close association between SLO and social impact assessment (SIA) was first articulated in the mining sector. There, research demonstrated that organisations involved in the ongoing negotiation of their SLO with host communities could benefit from being able to demonstrate the positive nature of the impact of their operations on the environmental, social, cultural, and economic aspects of the area. Clearly demonstrable positive social impacts were found to offset any perceived challenges to the ongoing renewal of SLO arising from the controversial nature of resource access and extraction.

Similar potential challenges to the SLO of the RMP industry were identified as a source of concern to AMPC. The RMP industry has, in the past, been associated with negative perceptions of its impacts on the environment, animal welfare, and local economies through its use of foreign workers. AMPC’s concerns on behalf of its members arose not so much because these challenges may or may not exist in reality, but because of the unknown nature and extent of current perceptions of RMP in contemporary Australian society.

To help AMPC achieve its aim of “deliver[ing] outcomes and benefits for both the Australian red meat processing industry and the broader Australian community”, the organisation needed to understand the perceived social impact of the RMP sector. From this, AMPC would be able to identify aspects of industry sector performance that had the potential to damage RMP organisations’ relationships with their stakeholders, and help its members to develop ways to respond to or mitigate these issues. In this way, AMPC would be benefiting the Australian community by identifying and addressing any perceived causes for concern about the social impact of the RMP industry. By achieving this outcome, AMPC would also be helping its members to maintain their SLO, and hence their sustainability.

AMPC therefore commissioned research to gain insights into how the decisions and behaviours of RMP organisations were impacting on the communities in which they operate. This was an entirely new project, as the social impact of the Australian RMP industry had never previously been assessed.

Dr Kim Johnston and a team of researchers from QUT were commissioned to carry out a benchmark study to determine what social impact the RMP industry has on its host communities.

Project 2017- 1061 had four objectives:

1. To develop and validate a tailored instrument to measure the social impact of the RMP industry in Australia
2. To establish a benchmark of the social impact of the Australian RMP industry
3. To develop six case studies that document the social impact of the RMP industry in specific Australian communities
4. To provide recommendations to the Australian Meat Processor Corporation (AMPC) on how to communicate more effectively about the social impact of the RMP industry.

Objective 1 required the researchers to create a way of measuring social impact in a context that had never previously been assessed in this way. To achieve this, the researchers interviewed and surveyed attendees at the AMPC national conference in Sydney in November 2016. The researchers combined insights from these participants with items from existing scales from other industries to create a new and unique instrument to measure the social impact of the RMP industry in Australia.

Using this instrument, the QUT team carried out an online survey of 2450 community members about their perceptions of the Australian RMP industry. Further research was carried out using interpersonal interviews with current employees of the industry – mainly from middle and senior management – in four RMP organisations around the country; and with representatives from the communities around these sites. Full details of the methodologies used are presented in Section 4.0 of this report. The conclusions of the analysis of the data gathered from these two approaches provided a benchmark of the current perceptions of the social impact of the Australian RMP industry. In addition, six of the examples of social impacts presented in the interviews were developed into case studies that document the social impact of the RMP industry in specific Australian communities. The findings of each stage of the data collection and analysis were presented to AMPC in a series of milestone reports.

Finally, the QUT researchers analysed the data from the online survey and the interviews, and developed a series of recommendations for AMPC's consideration and future action as the organisation seeks to benefit its members and the broader Australian community.

Like any research, Project 2017-1061 has some limitations. These limitations need to be acknowledged, although they are not seen as casting doubt on the validity of the findings of this research. The most obvious limitation is the size of the sample used in data gathering. Only four RMP sites were visited in Stage 2 of the research. The QUT researchers were not able to obtain confirmation of how many member organisations AMPC represents: it therefore cannot be guaranteed that this sample is representative numerically or experientially of the whole AMPC membership. In addition, very low numbers of RMP employee responses to the online survey were received, despite the QUT research team seeking endorsement from organisational management. Those employees who participated in the face-to-face interviews in Stage 2 were selected by management, although they did voluntarily agree to take part. The QUT team members were not advised about the basis on which these selections were made. It is possible the participants were chosen by management because they had particularly strong and positive perceptions of their organisation's impact on the community. Any such biases might skew the data.

A limitation of the survey was that the items for the survey were borrowed from other disciplines, mainly tourism, and modified for the context under investigation based on the qualitative interviews. It would have been preferable to have developed scale items specifically for this study that were context specific however this is a very timely process to develop new scale items. The items that were used however were deemed suitable for the current study based on alignment with the current study, pretesting and reliability and validity of the items. It would be suggested that further testing is required to determine if these scale items are able to be extended into other contexts.

While the community sample was drawn from participants across Australia, these participants were recruited via an online panel data company. This has limitations given that while there is a representation on postcodes and general demographics, the online panellists self-select for these panels and are paid a small incentive to participate which may limit their true generalisability. However, given the size of the sample, spread of ages and the gender split it is likely that this is as generalisable as other more traditional sampling methods.

Despite these limitations, the QUT research team is confident that the data gathering, analysis, and interpretation have been conducted in a professional manner such that the results are a true and accurate reflection of the social reality studied. The consequent recommendations are therefore valid and credible, and will help AMPC in its mission to support and benefit its members and the wider Australian community.

3.0 PROJECT OBJECTIVES

As discussed in the Introduction section above, Project 2017-1061 was developed to provide AMPC with accurate and reliable data on current perceptions of the social impact the RMP industry has on its host communities. Identifying and assessing these social impacts was a vital precursor to understanding what challenges exist in maintaining RMP organisations' SLO; and how the community appreciation for the RMP industry underpinning that SLO could be maintained and enhanced. To achieve these outcomes, the QUT research team was given four objectives to achieve:

1. To develop and validate a tailored instrument to measure the social impact of the RMP industry in Australia
2. To establish a benchmark of the social impact of the Australian RMP industry
3. To develop six case studies that document the social impact of the RMP industry in specific Australian communities
4. To provide recommendations to the Australian Meat Processor Corporation (AMPC) on how to communicate more effectively about the social impact of the RMP industry.

Milestone reports submitted by the QUT research team over the past nine months demonstrated the achievement of each of these objectives. This final report collates and synthesises the interim information already submitted and approved by AMPC, and presents a detailed summary of the research process, its outcomes, and resulting conclusions and recommendations.

4.0 METHODOLOGY

This section of the report details the methods used to gather and analyse the data required to achieve AMPC's four objectives as listed in Section 3.0 above.

Project 2017-1061 was conducted in three stages, and reported on to AMPC in milestone reports as detailed in the sections below:

4.1 Stage 1

Stage 1 involved the preparation of a formal review of current literature relevant to the key topics of SLO and SIA in the Australian RMP sector. This review informed the development of draft versions of an interview protocol and online survey that explored participant perceptions of the social impact of the RMP industry.

Pilot testing of these draft instruments was carried out at the AMPC conference in Sydney in November 2016. Participants were volunteers from among the conference attendees. Participant reactions to interview questions indicated some found them hard to understand and therefore respond to. As a result, the researchers made amendments and refinements to the interview protocol to make it easier for interviewees to understand.

Milestone reports 1 and 2 reported on the successful completion of Stage 1 of the project. The Milestone 2 report also addressed the research governance of the project and the obligation to adhere to Australian standards for the conduct of ethical research practice.

4.2 Stage 2

In Stage 2 of Project 2017-1061, QUT research team members visited four RMP organisations (metropolitan and rural/regional areas in two different states) and conducted face-to-face interviews with employees. In total, 21 interviews were carried out, mainly with mid-level and senior management. Separate interviews were also carried out with 22 community members in the geographical areas surrounding the selected organisations. These community members included local council members, retailers, and residents. All interviewees – both the employees and community members – were invited to discuss their perceptions of the relevant RMP organisation specifically, and the RMP industry in general. These interviews were semi-structured, drawing on the findings of the Stage 1 literature review to some extent, but also allowing interviewers to explore themes and concepts raised by participants during the live interviews.

Milestone 3 report contains full details of the method, ethics and research design adopted for this stage. The Milestone 3 report also provided an overview of the initial round of analysis: the Milestone 8 report provides a full report on the analysis and recommendations.

Following the conduct of 43 in-depth interviews reported in Milestone 3, six case studies were identified that provided narratives around several of the key areas of the RMP industry's social impact as identified by participants. Further interviews – in person where possible – provided more detail around each of these case studies.

The stories within the cases provide real-world examples of the positive impacts the RMP industry has around Australia. Milestone 7, with the six case studies, was submitted to AMPC on 19 June 2017 and approved shortly after.

4.3 Stage 3

Stage 3 involved the conduct of an online survey of 2450 community members and employees of the RMP industry. Milestone 4 reported on the development of the instrument used in this survey. The survey instrument was developed by combining empirical published scales on social impact within different industries, with findings from the Stage 2 interviews (described above). Most of the scale items in the new survey instrument came from existing scales with demonstrated reliability and validity. The Milestone 4 report provides full details of the sources used. The dimensions of social impact covered in the survey were founded on the key themes that emerged from the analysis of the interviews and from the previously published studies on social impact. The scales that were selected from the previous studies were modified for the current RMP context.

For the community survey, a commercial panel data company was recruited to gain access to targeted community (panel) members according to their postcodes. The initial approach was to target only the community members surrounding the four geographic areas identified in Milestone 3, but this would not have gained enough participants. Researchers subsequently sought advice from AMPC about postcodes which resulted in a purposive sample of participants representing all states and territories in Australia. Feasibility of responses was provided by the panel data company and postcodes were further refined to include therefore represented a selection of those areas within which there was a RMP organisation (5-15 km for urban area and average of 50km for a rural area). This resulted in the contracted response rate of 2450 participants. The survey was carried out in accordance with the protocols specified in the ethical clearance granted by QUT (QUT Ethics Approval Number 1600001157).

Milestone 5 and Milestone 6 reported on the progress of this quantitative stage of the research.

Milestone 8 provides full analysis and interpretation of this study. It includes a detailed analysis of the qualitative and quantitative findings and implications, and outlines key recommendations from this study.

The Snapshot provides extended industry analysis and actionable guidelines for the RMP industry.

Section 5.0 following demonstrates the achievement of the project outcomes as specified in Section 2.0 of this report.

5.0 PROJECT OUTCOMES

Project 2017-1061 delivered four tangible outcomes as summarised below:

5.1 A new and unique way to measure the social impact of the RMP industry in Australia.

QUT's research team has developed a new and unique survey instrument that has been used to assess the social impact of Australia's RMP industry. The survey uses Likert-type scales to measure community perceptions of the scope and nature of RMP on aspects of their lives, such as the environment, the economy, and cultural elements.

5.2 A benchmark of the social impact of the Australian RMP industry.

The survey instrument developed for this research project was used to assess the social impact of the Australian RMP industry. This type of assessment had never been conducted before, so the results provide a benchmark against which future performance and changes in social impact can be measured. The full findings of the research conducted in this project were presented in the Milestone 8 report.

5.3 Six case studies that document the social impact of the RMP industry in specific Australian communities.

Six case studies – listed below – describing specific instances of RMP social impact were submitted to AMPC in June. These case studies provide AMPC with material they can use and share on their internal communication channels, and in messages to external audiences.

Case study titles

- // A Christmas to Remember
- // Boys from the Bush
- // Kicking Goals
- // Leading the Way in Best Business Practice
- // Paddock to Plate
- // The Deep Blue Line

5.4 Recommendations to AMPC on how to communicate more effectively about the social impact of the RMP industry.

This research provides an empirical basis for nine recommendations to support AMPC understand and enhance the communication of its social impact. These recommendations are summarised in Section 6.0 below.

6.0 DISCUSSION AND RECOMMENDATIONS

This study was conducted to understand the social impacts of the Australian RMP industry. As part of the project, a tailored instrument was developed to measure and benchmark this social impact. This final section provides key recommendations that emerged from this study, to guide the Australian RMP industry, and its research corporation, the Australian Meat Processor Corporation (AMPC), on how to communicate its social impact. Future research opportunities are also identified.

The underpinning reason to communicate the social impact of the Australian RMP industry is to protect and enhance its social licence to operate. All organisations need this social approval to continue their operations. A key factor in achieving social licence is that organisations meet the needs, as ongoing expectations, and demonstrate that they are a conscientious, transparent, and trustworthy contributor to the society in which they operate. Successfully communicating the positive social impacts of a given organisation makes a significant contribution to enhancing its reputation as a good corporate citizen.

The recommendations arising from the research carried out as part of Project 2017-1061 fall into two categories:

1. Industry-level changes, where the recommendations relate to strategic and managerial strategies that would enhance and support the communication strategies suggested.
2. Recommended changes to the communication strategies and practices of the RMP industry generally, and of AMPC in particular.

The first consideration in developing these recommendations was whether the social impact of the Australian RMP industry needed to be improved across any or all of the four dimensions analysed. The conclusion from the data analysis in this report was that the RMP industry is, in fact, performing well across all four of the dimensions of social impact. The positive aspects of this performance are recognised and well regarded by some members of external communities who are aware of the RMP organisation in their area. However, the spread of this recognition to community members beyond those who are already aware of the RMP industry should be regarded as a priority. In addition, there is a need to improve awareness and appreciation of the social impact of the RMP industry within the industry itself, particularly at the operational level of employees. Unless capacity is built at this internal level, it is unlikely that any efforts to communicate the social impact to external audiences can be successfully and authentically sustained.

6.1 Recommendations - strategic

6.1.1 Recommendation 1: Social Impact – prioritisation and planning

The findings of this research demonstrate the RMP industry has a social orientation and understanding of the actual and potential social impact of its operations. However, there is an opportunity for a more cohesive approach to responding to the four dimensions of social impact as an industry. This recommendation argues that at an industry level, key priorities, actions, and areas for improvement need to be acknowledged and endorsed.

This will allow for shared understanding within the industry about what social impact is – industry-wide and at the individual meat processor level – and what actions should be prioritised for maximum effect at an industry level. This report is not advocating a generic industry level response, but more of a guide to standardise best practice.

6.1.2 Recommendation 2: Issues management planning and resource support

With more promotion and greater community access to the RMP industry comes greater scrutiny. The RMP industry, collectively and individually, needs better training and support in their interactions and responses to community members, the media and activists. This support requires the development of a full issues management plan with key messaging, training, and public relations resources guided by an industry perspective. This may mean that AMPC takes a proactive support/resource perspective, such as a resource and training schedule with executive education/workshops. In addition, a full issues management plan tailored to key regional and geographic areas is required. This resource will identify key opinion leaders, communication channels, community priorities and issues. The information obtained will structure and guide the development of appropriate key messages. Training will be needed to equip and build capacity within individual RMP to respond to the challenges of demonstrating transparency and trustworthiness required to maintain organisational social license to operate.

6.1.3 Recommendation 3: Standardised methodology for monitoring and measuring social impact

One of the key outcomes of this study is a tool to monitor social impact at an industry level over time. However, tools and resources could be made available to RMP at a local level to monitor their individual social impact. Strategies could then be determined and implemented to improve social impact at this level. This approach would develop capacity within the RMP industry to further understand and respond to pressures relating to social impacts. The innovative nature and process-driven nature of the RMP industry allows for policy, procedures, and guidance to remove any ambiguity or uncertainty surrounding a community's expectations of a RMP. In addition, it can help RMP understand how to respond to these expectations. Future research needs to be undertaken to explore the links between social impact and industry reputations.

6.1.4 Recommendation 4: Training portability

The professionalisation of the RMP workforce through training and accreditation is recognised as a very positive industry social impact. While the training is highly valued internally and externally, concerns raised by both industry and community members was the lack of “portability” of the qualifications to other industries. A recommendation is that the industry consider and promote pathways as options for staff who want to exit (or re-enter) the industry giving choice and scope for future development (and remove the sense of being trapped). This may mean an option for the skills to be modularised and the relevance for these skills to be recognised as valuable in other settings. Likewise, other skills can be incorporated into the current training modules, adapted from other industries, to extend training and career pathways for all levels of the organisation.

6.2 Recommendations - Communication

6.2.1 Recommendation 5: Engage internal stakeholders

One of the conclusions of this research is that not all RMP employees – particularly at the operational level – understand the positive impacts of their organisations on society, especially in their local communities. Prior research has repeatedly concluded that an organisation’s employees are its most powerful communicators and advocates to external stakeholders. If AMPC wishes to more effectively communicate the positive social impacts of its members, it first needs to build understanding of these impacts among industry employees.

6.2.2 Recommendation 6: Increase community awareness of RMPs

A key finding from this study was a general lack of awareness of RMP and subsequently the industry among community members living in proximity to a RMP organisation. The findings further indicated a correlation between knowledge of a RMP and a positive perception of the social impact of the RMP industry. When residents were not aware of the RMP organisation in their vicinity, they were more likely to hold a negative view of RMPs generally, and more specifically the social impact and contribution of RMPs to the community. This lack of awareness affects the perception of the social impact of the industry on communities.

Recommendation 6 therefore relates to increasing awareness of RMPs at a local level and the need to do more to let their communities know they exist. This could be achieved by having highly-visible signage at individual plants, documenting the numbers of employees employed by the facility, or local teams that are sponsored. Opportunities for open days should be considered, or regular tours for visitors to attend (pending workplace health and safety). Agreements could also be explored with local community groups, such as Scouts, rotary or Red Cross, to align community based activities. RMPs could continue to align with community education opportunities or events, or offer community-friendly information on websites and project sheets, providing a channel for local residents to gain more information. While the researchers recognise some RMP are already highly active in community support, not all processors prioritise this effort.

One area that will need to be considered by AMPC is the use of the terminology used to describe these plants. Although the industry-preferred term is ‘RMP plant’, this research suggests that the term ‘abattoir’ is more aligned to how the public identifies or refers to the sites.

6.2.3 Recommendation 7: Increase community understanding of the social impacts of the RMP industry

At an industry level, an education and awareness campaign is recommended to inform people about the quality of Australian red meat, the innovations of RMP, the nature of the industry, and the subsequent positive economic and social impacts of RMPs. The aim of such a campaign is to raise awareness and understanding of the red meat industry as a precursor to enhancing public engagement. It should also be noted that many community members indicated they would like to know more about their local RMP.

More specifically, there is confusion about the purpose of Halal certification, with little recognition of the export and marketing benefits. More education about the purpose of Halal certification is needed.

The public education campaign could align with opportunities for community open days at individual RMP sites.

At an industry level, education to highlight the nature of social impact – specifically the four variables identified in this study as economic impact, environmental impact, social cultural impact, and personal impact, and the role that social license to operate, stakeholder engagement and community development play in influencing each dimension of impact, and the outcome for overall social impact, is important. The results suggest while the influence of these activities on each type of impact is clear and significant, more needs to be done by the RMP industry to identify how to maximise resources in each area to continue to influence positive or beneficial levels of social impact.

6.2.4 Recommendation 8: Develop a community engagement strategy

The findings of this research indicate residents who are aware of a RMP in their community felt the processor held more of a social license to operate: that is, they felt the processor involves the community in decisions, is transparent in its practices, and is broadly accepted in the community.

Many RMP appear to adopt an ‘under the radar’ approach due to concerns that if people know they are there, or what they do, it will attract activists and attention. While this strategy may have worked in the past, it is much better to be proactive, transparent, and communicative. Research findings support that increasing residents’ knowledge results in a more favourable view of practices within the processing plant. It also increases the understanding of the role of RMPs in community development, and the engagement the industry has with local stakeholders. All of these elements contribute to positive perspectives and flow-on impacts within the community. However, there was also wide recognition that there was a very strong reluctance to promote to the community achievements, innovations or any outcomes. Industry participants particularly recognised a reluctance by their RMP to promote/publicise what they do. While one RMP in a regional area was taking steps to promote growth, change and innovation, there was an underlying caution reflected when talking about this general promotion.

The industry should recognise engagement with local community should be viewed as a positive activity, and resources and guidance at an industry level should be provided to individual RMP to support them in efforts to proactively engage with their local communities and strengthen specific community relationships. In this way, social license can evolve over time. In addition, it is recommended RMPs should regularly conduct research to ensure they continue to understand and achieve a social license.

6.2.5 Recommendation 9: Better story telling

A major finding from this research project is the varied and complex contributions the RMP industry makes to Australia society. In other words, the RMP industry has some great stories to tell about itself and its social impact and contributions at a local, regional, and national level. These narratives need to be shared more widely than is currently the case, and on an ongoing basis. To achieve this outcome, responsibility needs to be assigned to a full-time communications person whose remit will be to identify and widely communicate social impact success stories to audiences both within the industry and beyond.

7.0 CONCLUSION

This project was designed to provide a scientific approach with the aim to understand and document the social impact of the Australian RMP industry. This report has summarized four key objectives and the measures taken to meet these objectives. Nine recommendations emerged from the research findings and are documented in this report

While the research carried out for Project 2017- 1061 addressed the four objectives specified by the AMPC, there is an ongoing need for further research to build on the findings of this significant project. Given that the purpose of Project 2017- 1061 was to create a set of benchmarks around the social impact of the RMP industry, future research needs to be undertaken to track changes against this baseline. Analysis will also be required to determine the effect of any implemented recommendations and other changes on the overall social licence to operate of the RMP industry in Australia.

Future research should be undertaken to identify and explore factors, other than social impact, that influence an organisation's social licence to operate. Key areas to explore include the relevance of reputation to social licence to operate; and the significance of this at both an organisational and an industry level.

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