

Community Trust in the Australian Cotton Industry

2025 Survey Report

December 2025



CITATION

Voconiq (2025). Community Trust in the Australian Cotton Industry. Voconiq, Australia.

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VOCONIQ, OUR STORY

Voconiq is an Australian data science company built on a platform of research developed by Australia's national science agency, CSIRO. The Voconiq founding team spent 11 years in CSIRO building this science platform, engaging over 70,000 community members in 14 countries to understand what leads to deeper trust between industries, companies and governments, and the communities they work alongside. Founded in 2019, Voconiq was created as a vehicle for delivering this science as a service globally. Voconiq is the home of Engagement Science and we are passionate about giving voice to communities large and local about the issues that matter to them and helping those that work alongside them to listen to community voices effectively.

To learn more, go to www.voconiq.com



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Introduction

This report represents the latest iteration in an ongoing effort to understand community trust, attitudes, and expectations toward Australia's cotton industry. Since the program first began in 2020, this research has engaged with diverse groups across Australia, collecting robust and representative data to capture evolving public sentiment from more than ten thousand participants.

The Community Trust in Australian Cotton Industry remains committed to fostering open dialogue between industry, stakeholders and the broader community. Through this research, key trends and challenges have been identified, offering valuable insights into critical areas that drive the industry's social licence to operate, including environmental management, industry responsiveness, benefit sharing and regulation. This year, the community have indicated a large level of uncertainty around these themes, underscoring the need for the cotton industry to understand the nuance of community understanding and expectations of the industry.

This year's survey explores both longstanding and emerging issues, providing stakeholders with actionable insights to navigate an increasingly complex social landscape. By leveraging longitudinal data and introducing new questions to address contemporary concerns, the report offers a comprehensive view of the cotton industry in the context of changing societal expectations.

As we delve into the findings, this report aims to serve as a resource for industry leaders, policymakers, and the community, providing a roadmap for building stronger relationships and addressing key challenges collaboratively. Through thoughtful engagement and continued adaptation, Australia's cotton industry can ensure its practices align with community values and foster enduring trust and acceptance.

The research process

In line with previous surveys in this program, an online survey methodology was used to access the views of Australians over the age of 18 years. An online research panel was used to ensure a representative sample of Australians by age and gender in line with Australian Bureau of Statistics data. Participants were recruited across the country between 30 October and 17 November 2025. 3,063 surveys were included for analysis after data cleaning¹.

The survey instrument is developed with the aim of building an in-depth understanding of community perspectives towards the cotton industry. Being able to track sentiment over time is a key value point of the Community Trust in the Australian Cotton Industry program. For this reason, many of the same questions included previously were also included in the previous four surveys conducted. Participants were asked a comprehensive set of demographic questions, as well as on the following topics²:

- Environmental management
- Governance and regulation
- Economic impact
- Industry responsiveness
- Ethical supply chains
- Industry information
- Trust in the industry
- Acceptance of the industry

Before beginning the survey, participants read information about the study and were required to indicate that they understood the research aims, funding source (Cotton Australia and Cotton Research and Development Corporation), and how participant data may be used. Participants were provided with a clear definition of the cotton industry at the beginning of the survey:

“Cotton is predominantly grown in the inland regions of New South Wales and Queensland, with some cotton also grown in northern Western Australia and the Northern Territory. Australia is one of the world's largest exporters of raw cotton with more than 99 per cent of production exported, mainly to

¹ 'Data cleaning' is conducted in order to ensure the quality of data included in analyses is high. This involves screening and potential removal of surveys where, for example, participants answered the survey very quickly (i.e. less than 5 minutes), in ways that indicate lack of attention to the content of questions, and extreme or consistent responding on survey questions (i.e. answering '1' to all questions). For more detail on what this involves, see Meade AW and Bartholomew C. (2012) Identifying careless responses in survey design. *Psychological Methods*, 17(3), 437-455. DOI: 10.1037/a0028085.

² Most topics were measured using 5-point Likert type agreement scales, where 1 = Strongly disagree, 2 = Disagree, 3 = Neutral, 4 = Agree, 5 = Strongly agree. When reporting, categories may be combined to express "agreement" (combining results of Agree and Strongly agree) and "disagreement" (combining results of Disagree and Strongly Disagree).

Asian spinning mill customers, where it is used to manufacture clothes, fabrics and other products."

Each year, additional questions are included as focus topics. This year's focus topics were ethical supply chains and industry information.

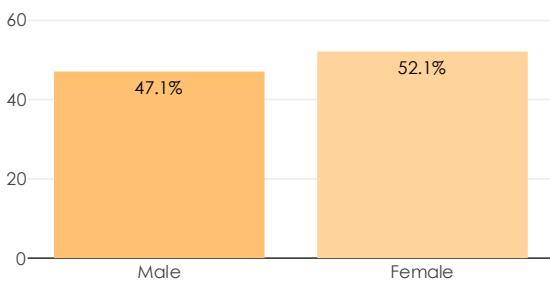
Participants were also encouraged to make freeform comments at the end of the survey, and a selection of these comments are included throughout this report.

Who completed the 2025 national survey?

2025 participants – 3,063

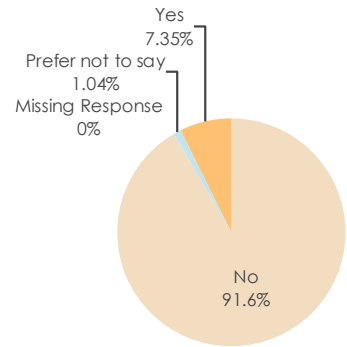
Overall participants – 10,091

Gender

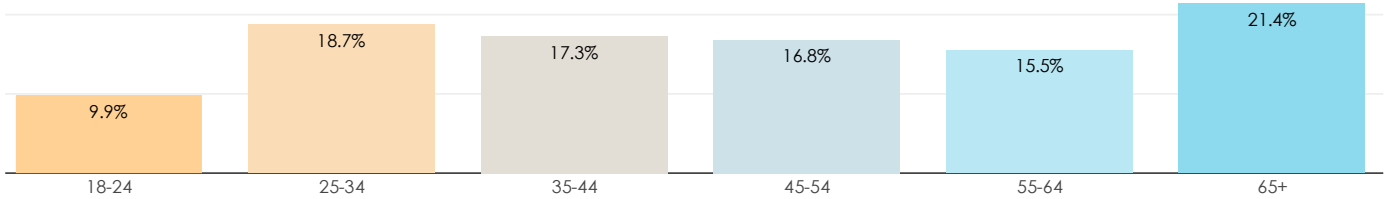


Non-binary: 0.56%
Prefer not to say: 0.16%
Prefer to self-describe: 0.03%

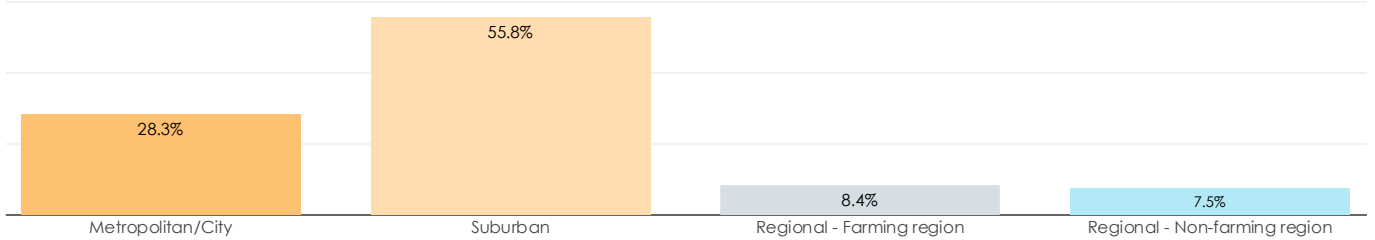
First Nations



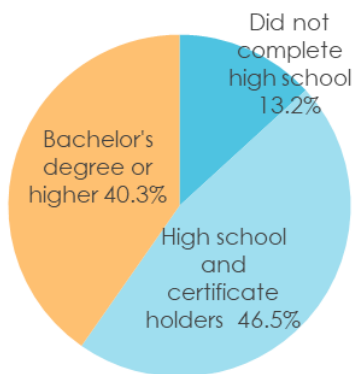
Age



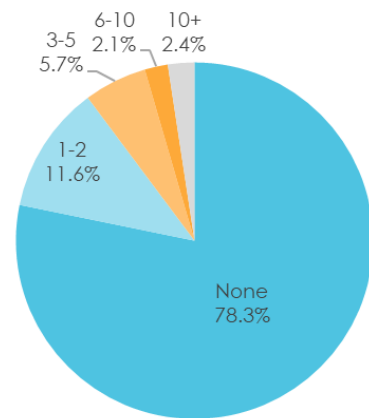
Region



Education



People known in the cotton industry



The cotton industry and the Australian community

This research explored the relationship between the cotton industry and the broader Australian community. Industry performance and the social context in which these industries operate is central to understanding the value Australians attribute to industry, their economic impact and contribution to community.

Industry importance

Australians have consistently recognised the importance of the cotton industry throughout this program of research. When asked if “the cotton industry is important to our way of life in Australia” 73% of survey participants agreed, an increase of 6% since the first survey (Figure 1). This year more than three-quarters of community members agreed that the cotton industry “plays an important role in regional communities where it operates” (80%) and that it “creates an important export product for Australia” (78%; Figure 1). Growth on these measures overtime reinforce that the Australian community value the cotton industry.

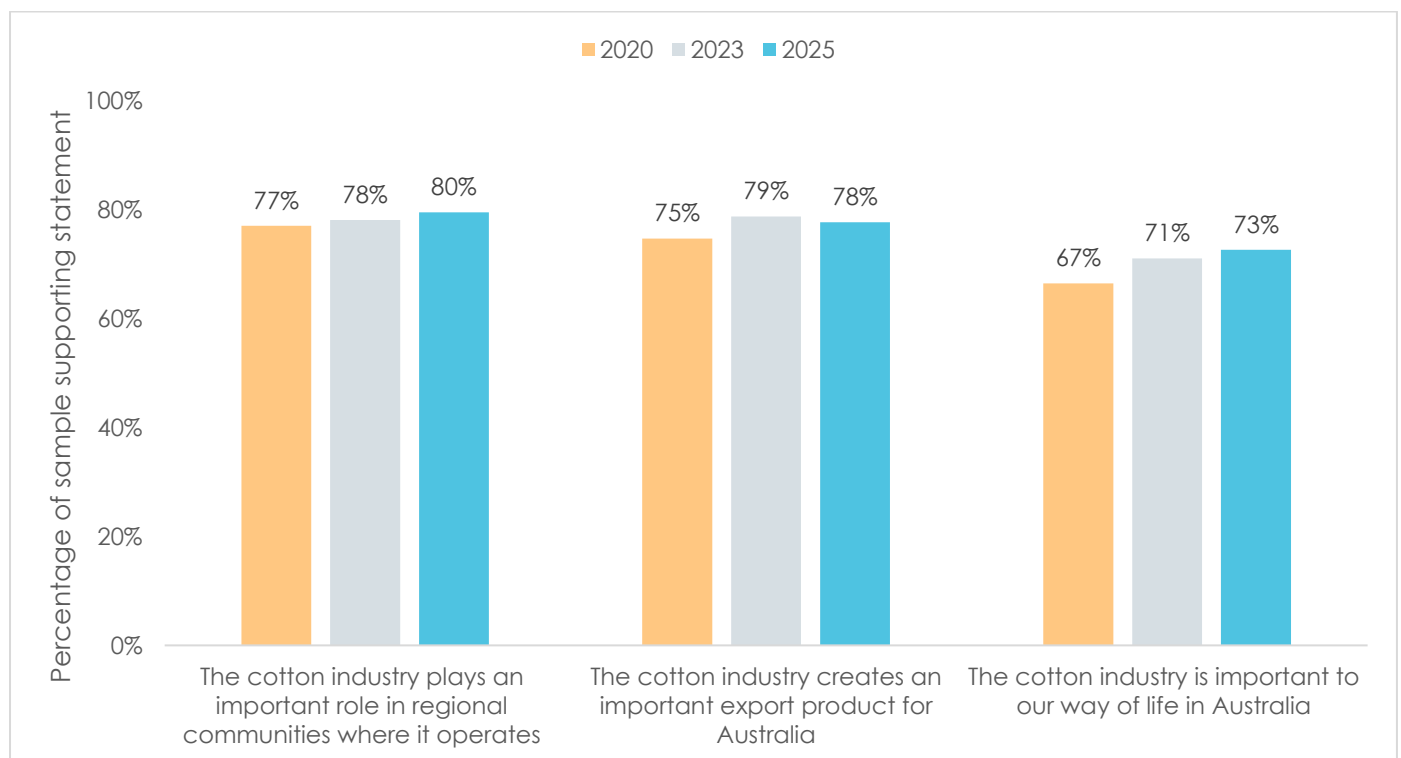


Figure 1: Portion of agreement on cotton industry importance measures, 2020-2025.

Community trust and acceptance

Underpinning this importance of the cotton industry is the extent to which community trust and accept its operations. Understanding the industry-community relationship is measured through two core trust and acceptance items.

Measured on a scale from 1 (Not at all) to 5 (Extremely), the average level of trust in Australia's cotton industry was 3.19 in 2025, an increase of 0.07 from the last survey (Figure 2). This score, which is above the midpoint, indicates a strong level of trust. Trust in the cotton industry has been stable over time, having returned to baseline levels after experiencing a dip below the midpoint in 2022. This trust score is comparable with other agricultural industries in Australia, and higher than typical scores seen for mining companies.

On the same scale, acceptance of the cotton industry scored an average of 3.46 in 2025 (Figure 2). While acceptance has also been relatively stable since the beginning of the program, acceptance of industries across all sectors spiked in 2020 as Australians rallied against the impacts of the COVID-19 pandemic before dropping in 2021. Like trust, acceptance has now returned to similar baseline levels of over 3.4 in both 2023 and 2025 (Figure 2). These scores may be climbing over time as cotton becomes more readily available to the public as retailers, such as Kmart, commit to sourcing 100% sustainable cotton in recent years³.

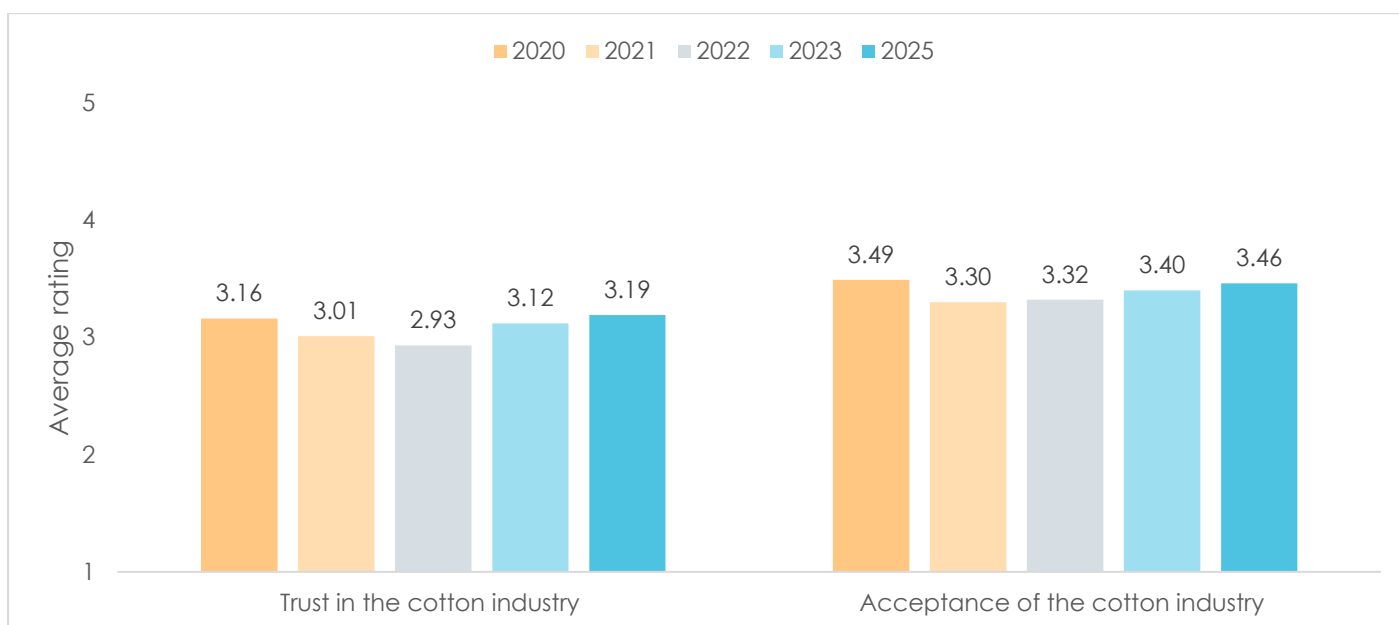


Figure 2: Average ratings of trust and acceptance of Australia's cotton industry, 2020-2025.

Understanding what influences community trust and acceptance is a prime goal this research. Using a statistical technique called path modelling, we are able to identify what matters most to the community when it comes to their trust and acceptance of the cotton industry. This year, those areas are:

³ <https://bettercotton.org/engaging-the-market-to-drive-impact-in-the-field-qa-with-kmart-australia/>

1. Environmental management
2. Industry responsiveness
3. Distributional fairness (new for 2025)
4. The balance of cotton production and environmental impacts
5. Importance of the industry

The House of Cotton framework introduced in 2020 (Figure 3) continues to highlight the interconnectedness between these levers of change. Managing environmental impacts responsibly leads to perceptions that use of water is fair, and the balance of production against impacts is being met. In turn, this reinforces that the industry is being responsive to concerns. Other areas, like regulation and importance of the industry feed into these three categories by providing assurance that the industry is being held accountable, while also demonstrating to the industry that the cotton growers are valued for the work they and the industry do in meeting these expectations.

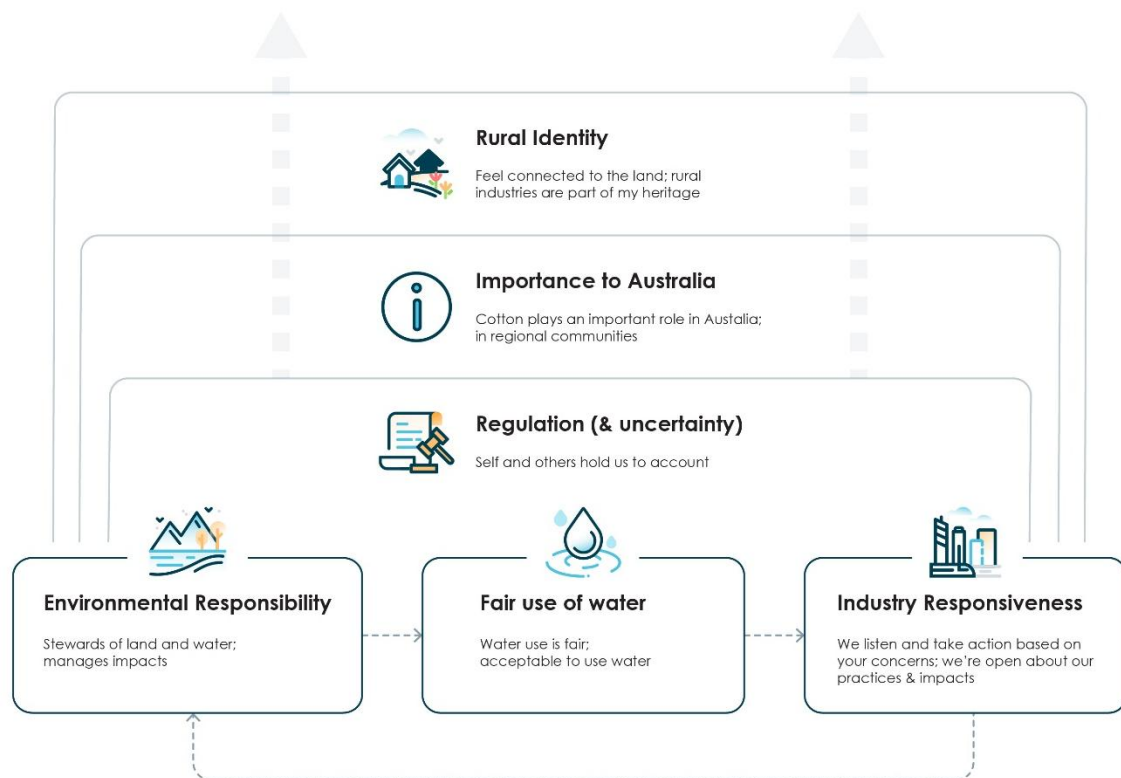


Figure 3: House of Cotton framework.

This report will delve deeper into these areas to understand how the cotton industry can generate the most impact in order to strengthen its relationship with the Australian community. Other topics, while still important but not direct influencers of trust and acceptance, like regulation and information, are also included for discussion.

Environmental management

Managing environmental impacts responsibly and sustainably is both an aim of the cotton industry and a concern for the community. Broadly, the community are focused on three main themes: water usage, biodiversity protection, and reducing greenhouse gas emissions. Exploring these themes allows us to uncover the nuances that make up community perceptions of how the cotton industry manages its environmental impacts.

Responsible use of water

More people agree this year than they have in any other year of the survey that the cotton industry uses water responsibly at 47% (Figure 4) compared to 42% in 2020. Fewer people agreed that “the way water is allocated in Australia for different uses is appropriate” at 41% (Figure 4). The community were largely in agreement that water should only be used in industries like cotton after making sure the community (62%) and the environment (56%; Figure 4) has enough first. There was mixed sentiment on the measure “we should not be using water to grow cotton when it could be used to grow food” with 28% who disagreed, 30% who agreed and 42% who were neutral (Figure 4). There was strong agreement regarding community concern for foreign ownership of land and water rights at a combined 71% (Figure 4). More than 60% of community members agreed that innovation and technological developments can help overcome water scarcity in Australia.

However, a high number of neutral responses can indicate that community members are uncertain either about how the industry is managing its water use or are “sitting on the fence” when it comes to making a decision. High neutral scores for the appropriate allocation (43%), using water to grow cotton rather than food (42%), and the responsible use of water (44%; Figure 4) may indicate that the community are unsure about how water is being used in both the cotton industry and Australia more broadly. The cotton industry may want to consider activities that highlight is responsible use of water, or collaborate with other agricultural industries to build awareness of water use.

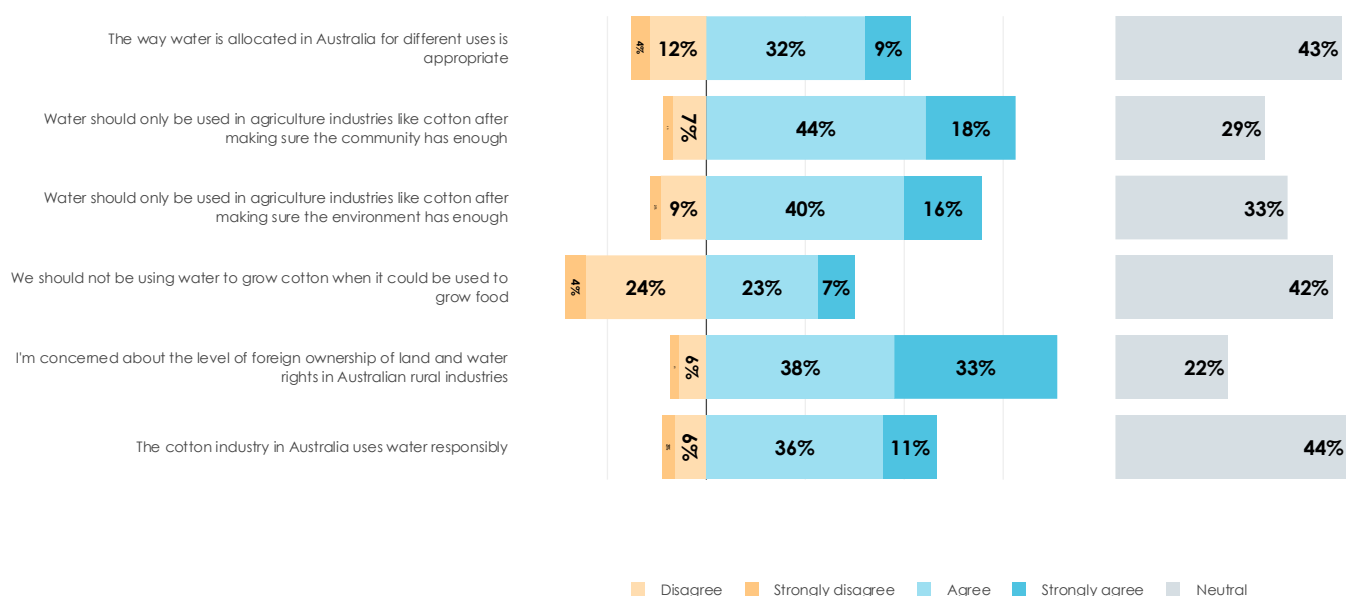


Figure 4: Distribution of response to water use measures, 2025.

Protecting biodiversity and pesticide use

The use of pesticides and biodiversity protection was an area that the community were largely uncertain about. More than half of all Australians responded neutrally to the statement “the cotton industry does enough to protect its biodiversity” at 51%, while 38% agreed and 12% disagreed (Figure 5). However, the community generally trust the cotton industry to use pesticides responsibly (62% agreed), and 47% see the use of pesticides by farmers as necessary (Figure 5).

There was a split in responses to the statement “the use of pesticides really bothers me” with 42% who agreed, 36% who were neutral and 21% who disagreed (Figure 5). A similar distribution of responses was given for the statements “I feel more comfortable with the use of genetic modification of plants that produce fibre (e.g. cotton) than I do for plants that produce food (e.g. corn)” (46% agreed, 37% neutral, 17% disagreed) and “I feel better about the use of genetic modification of cotton plants if it means the industry uses less insecticides” (55% agreed, 34% neutral, 10% disagreed; Figure 5).

Taken together, the cotton industry should feel confident that they have community support, particularly around the responsible use of pesticides. Communicating with the community how the industry protects local biodiversity, and the role of pesticides in that protection, may help create a more informed community.

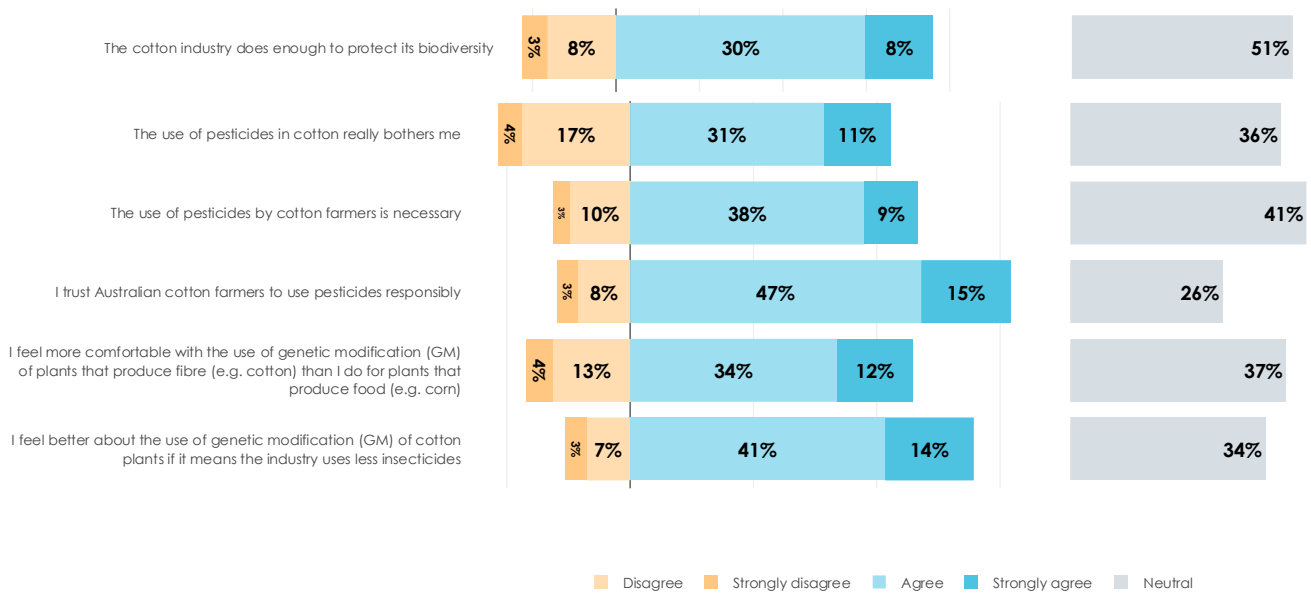


Figure 5: Distribution of response to biodiversity and pesticide use measures, 2025.

Reducing greenhouse gas emissions

In addition to pesticide and water use, the community were also uncertain about greenhouse gas and the cotton industry. When asked if the industry is “committed to reducing greenhouse gas emissions” 51% of participants responded neutrally, with 42% who agreed and 7% who disagreed (Figure 6). While agreement to this question has grown 0.9% since it was first asked in 2023, the portion of neutral responses has also increased from 49% in 2023 to 51% in 2025, reinforcing that the community are largely uncertain about the industry’s commitment to reducing greenhouse gas emissions.

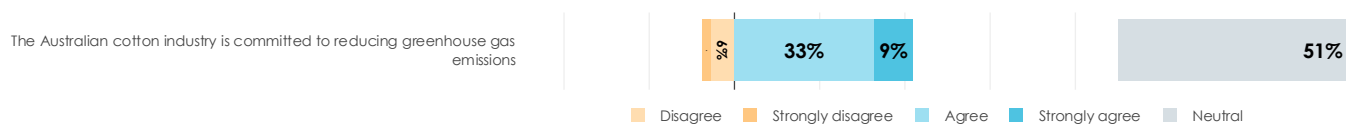


Figure 6: Distribution of response to greenhouse gas emission measure, 2025.

Environmental management and industry exposure

Survey participants who knew more people who in work in the cotton industry were generally more likely to agree on environmental management measures than those participants who knew no one. Across all three main measures of responsible water use, biodiversity protection, and commitment to emission reduction, those who knew no one in the cotton industry had the lowest average rating (Figure 7).

A pattern emerged for those who had more exposure to the cotton industry. When asked about the industry’s commitment to reducing greenhouse gas emissions, those who knew 6-10 people in the cotton industry gave the highest average score of 3.94, while those who knew more than 10 dropped to 3.72 (Figure 7). Other rural industries have seen a

similar pattern, where those who know more than 10 people in the industry are less likely to agree than those who know 6-10.

On the other hand, those with more industry exposure were more aligned in their responses for the remaining environmental management questions. Those who knew 3-5 people in the industry gave the highest mean score for “the cotton industry does enough to protect its biodiversity” at 3.68, while the average rating decreased by 0.02 as the number of people known increased (Figure 7). Those who knew 6-10 gave the highest average rating for “the cotton industry in Australia uses water responsibly” at 3.78, but were largely in line with those who knew 3-5 and 10 or more people in comparison (3.77 and 3.76, respectively; Figure 7).

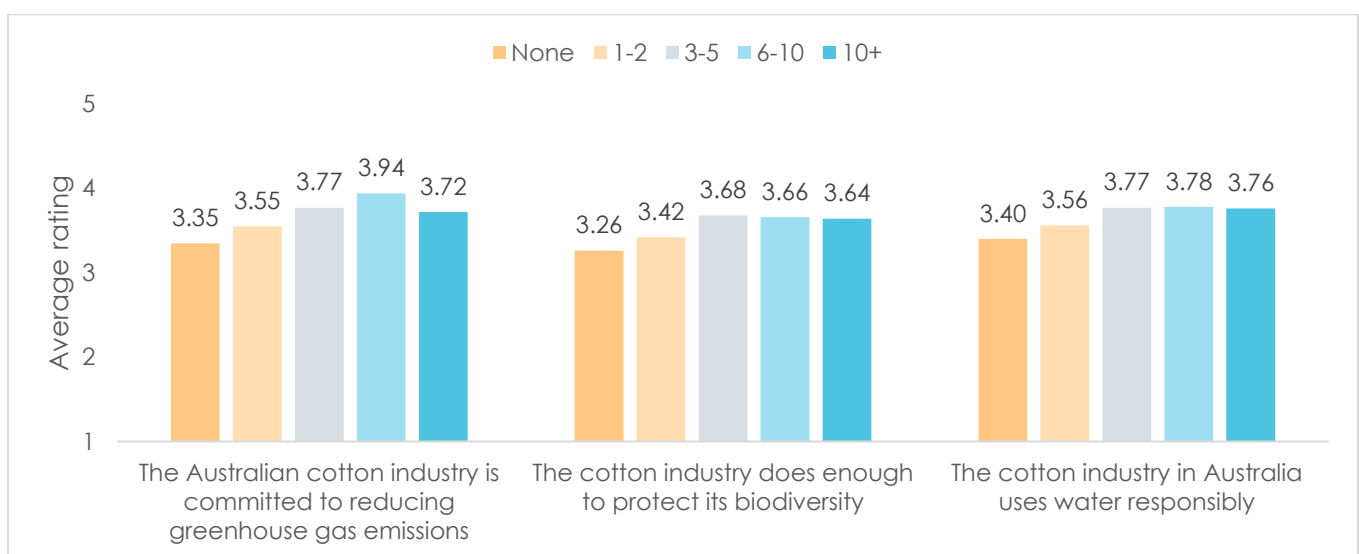


Figure 7: Average rating of environmental management measures by number of people known in the cotton industry, 2025.

What the community said about environmental management

“I appreciate the efforts toward sustainability, but I’d like to see more transparency about environmental impact, water use, and labour conditions. Open communication and verified certifications would really help build more trust in the Australian cotton industry.”

“I believe cotton uses a lot of water to grow and Australia has scarce supply of water that should be used to fulfill environmental and community obligations first.”

“Clearer communication about environmental impact and how farmers protect soil, water and wildlife.”

Industry responsiveness

Central to the relationship between the Australian cotton sector and the community is industry responsiveness. When asked if the industry was “prepared to change its practices in response to community concerns” 46% of Australians were neutral, 45% agreed, and 9% disagreed (Figure 8). In addition, the same percentage were neutral regarding the industry’s ability to listen and respect community opinions at 46%, while 43% agreed and 11% disagreed (Figure 8). Similar to environmental management, these high neutral responses may indicate a level of uncertainty within the community. With industry responsiveness, neutral responses may indicate that the community is unaware of actions the industry has taken in response their concerns.

Close to half of all community members agreed that “when rural industries like cotton acknowledge their mistakes after public outcry, I can forgive the mistake” (47%), alongside 40% of participants who responded neutrally and 13% who disagreed to the statement (Figure 8). These results indicate that Australians give the cotton industry some benefit of the doubt for when things go wrong, particular when those things are publicly acknowledged. The cotton industry may see this as an opportunity to take strength from being vulnerable when responding to concerns and acknowledging mistakes to support community trust and acceptance.

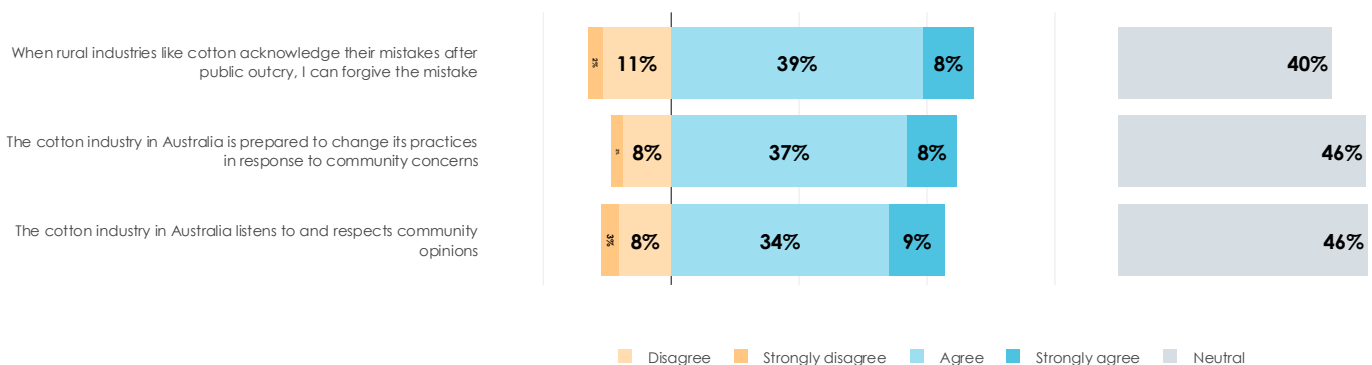


Figure 8: Distribution of response to industry responsiveness measures, 2025.

Average ratings for these measures have increased over time since the first anchor survey in 2020. Ratings for preparedness to change have been stable over time, having increased by 0.09 between 2020 and 2025, while listening and respecting community concerns increased 0.08 in the same period (Figure 9). For these two key industry responsiveness measures, as agreement has increased, neutral responses have decreased. The rating for acknowledging mistakes began with a 3.41 in 2020 before it decreased in 2023 to 3.35 and then increased this year to 3.40 (Figure 9). This minimal change over time reinforces the need for consistent and transparent communication when it comes to industry responsiveness.

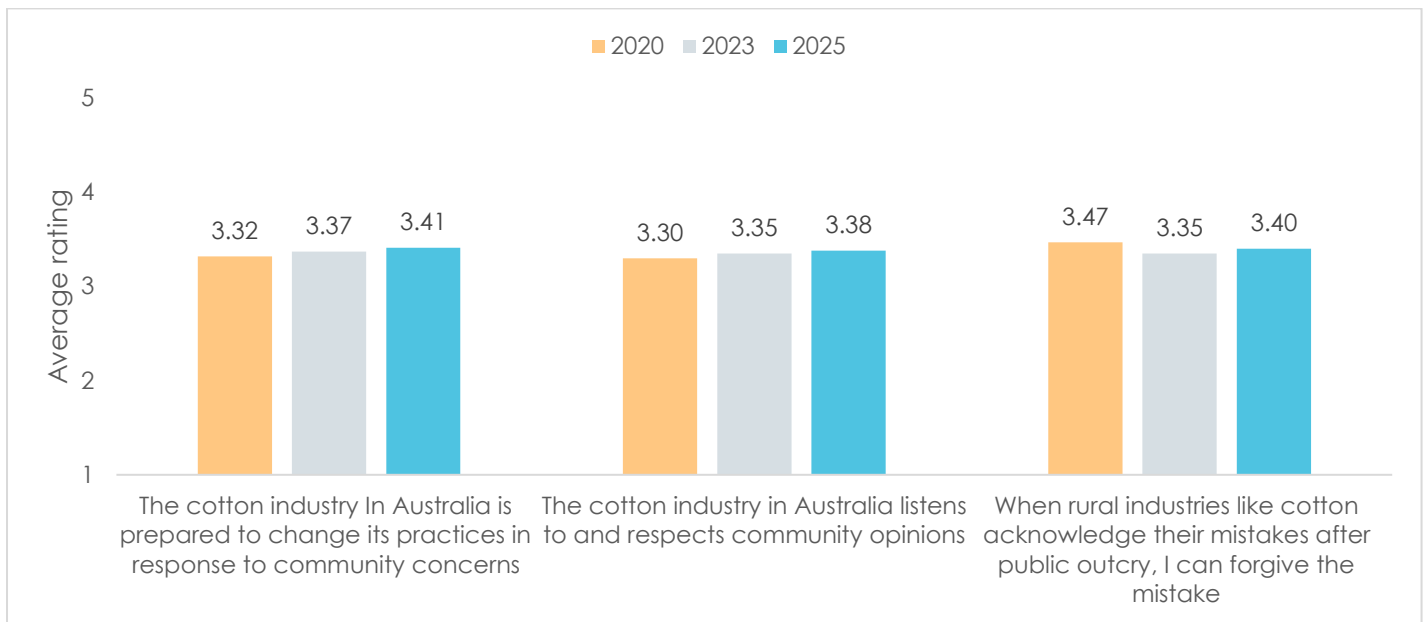


Figure 9: Average ratings of industry responsiveness measures, 2020-2025.

What the community said about industry responsiveness

“More effectively communicate its efforts to address community concerns about water use, environmental responsibility, and labour conditions.”

“It’s good to see the industry taking steps on sustainability, but more transparency would build trust.”

“Better transparency in responses to community concerns, particularly regarding environmental responsibility and sustainable water use.”

Economic benefits and distributional fairness

The Australian community has consistently recognised that the cotton industry provides important economic benefits to the nation. Most Australians agreed that it is important for the cotton industry to develop local manufacturing at 80%, and that the industry generates significant local jobs in regional areas (77%; Figure 10). Two environment-economic trade off questions were also asked. While participants were mostly in agreement that “protecting the environment is more important than protecting people’s jobs” at 43% (38% neutral, 19% disagree), there was a more even split for the measure “the economic benefits of growing cotton in Northern Australia is more important than the impact on the environment” with 38% who were neutral, 32% who disagreed, and 31% who agreed (Figure 10). While these trade-off questions highlight important challenges being faced by the industry, high neutral scores such as this may indicate that the community are uncertain about either the economic benefits generated by the industry or what the industry is doing to protect the environment. Communicating with the community, particularly around what industry careers exist to help manage environmental impacts, may help alleviate this uncertainty.

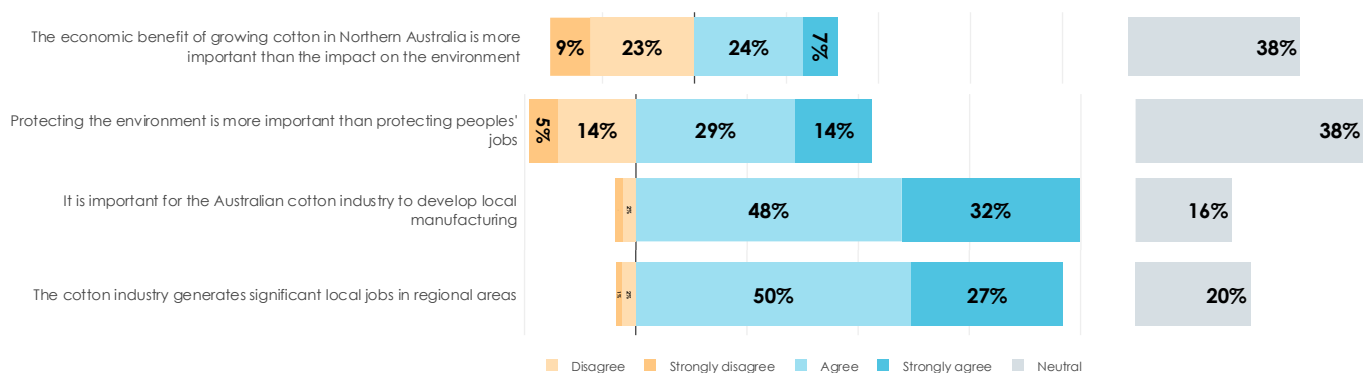


Figure 10: Distribution of response to economic impact measures, 2025.

Understanding perceptions towards industry benefit sharing is important for strengthening the community-cotton relationship. Responses were similar for all three distributional fairness measures asked. Close to half of the community agreed that Australia receives a fair share of the benefits from the cotton industry at 47%, while 45% agreed that regional communities receive a fair share (Figure 11). Neutral responses for both measures were high at 42% (Figure 11). Fewer people agreed that “most of the benefits that come from growing cotton go to cotton farmers” at 38%, with 43% who were neutral and 19% disagreed (Figure 11). Highlighting how the cotton industry shares its benefits back with the community, as well as understanding why participants are responding neutrally to these statements may help with assisting community engagement with these measures.

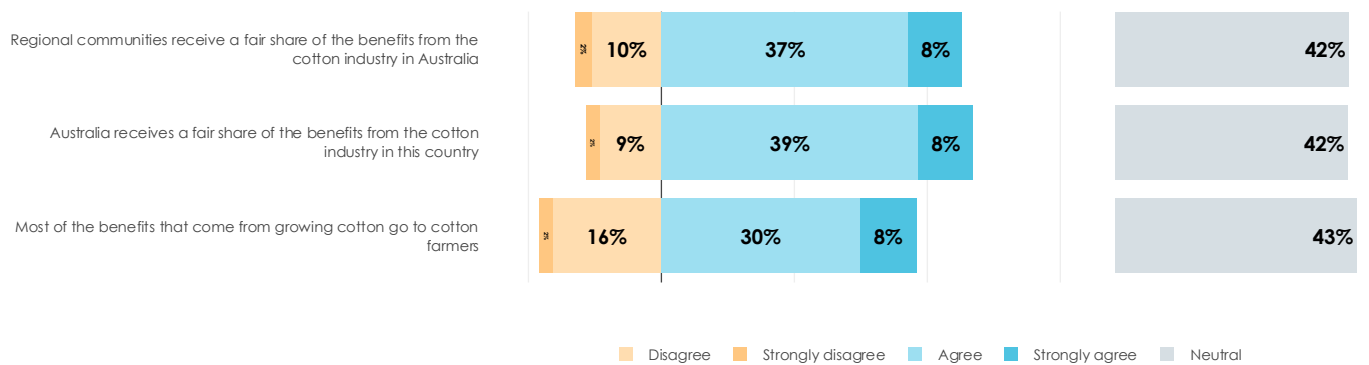


Figure 11: Distribution of responses to distributional fairness measures, 2025.

What the community said about economic benefits and distributional fairness

“To be honest and truthful to the surrounding communities and give back to those who deserve it.”

“Australia needs to continue to export cotton to boost the economy and give employment opportunities.”

“The cotton industry is of benefit to all only if it is well regulated by the government and the body in charge.”

“I hope the government help regulate the water usage and also the benefits of the Indigenous and local communities.”

“Cotton industry is extremely vital to Australian economy and rural areas. Keep it local please!”

Accountability and regulation

Regulatory mechanisms can provide assurance to the community that the industry does the right thing. There is a significant amount of uncertainty regarding how effective regulation of the cotton industry is, with 54% of participants responding neutrally to the corresponding measure of “I don’t think that regulation of the Australian cotton industry is effective” (30% agreed, 16% disagreed; Figure 12). There was a similar level of neutral scores for statements “the Australian cotton industry does enough to enforce their own best practices on individual farmers” (49% neutral, 41% agreed, 10% disagreed) and “penalties for misusing natural resources like water in the Australian cotton industry are not strong enough” (46% neutral, 45% agreed, 9% disagreed; Figure 12). The cotton industry may want to reflect how it communicates to the community the efforts and activities made to meet regulatory obligations.

On the other hand, the community indicate their support for the industry when it holds itself accountable. Close to three-quarters of Australians agreed that cotton farming organisations have a responsibility to hold individual cotton farmers accountable (73% agreed, 24% neutral, 3% disagreed; Figure 12). When asked if “cotton farmers can’t all be held responsible when a handful of people in the industry break the rules” 59% of participants agreed, 29% were neutral, and 12% disagreed (Figure 12), reinforcing the need for the industry to hold individuals accountable. Notably, 71% of Australians agreed that “growing cotton in northern Australia is acceptable if clear environmental regulations are followed” (Figure 12). The cotton industry should feel confident that they are supported as long as they hold individual farmers to account and meet environmental regulations.

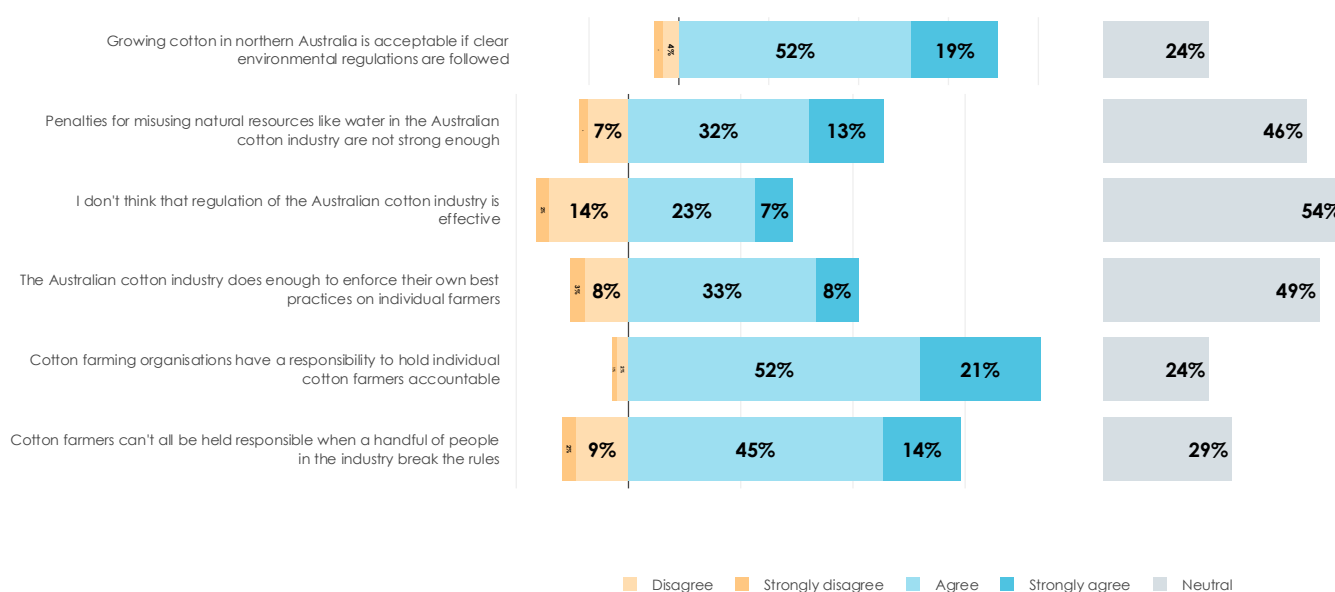


Figure 12: Distribution of response to regulation measures, 2025.

Focus topics

Ethical supply chains

For the second year, a focus topic of ethical supply chains has been included. Australians were in overwhelming agreement that the cotton industry “has a responsibility to ensure their supply chains are free from modern slavery” at 79% (Figure 13), a stable level of agreement from 2023 when the question was first asked (80%). When asked if “exploitation of workers is a serious problem in the Australian cotton industry” more than half of all survey participants were neutral at 51%, compared with 34% who agreed and 15% who disagreed (Figure 13). Neutrals responses to this worker exploitation measure have been consistently high since it was first asked in 2020; initially 51% at baseline, 53% in 2023, to now 51% this year.

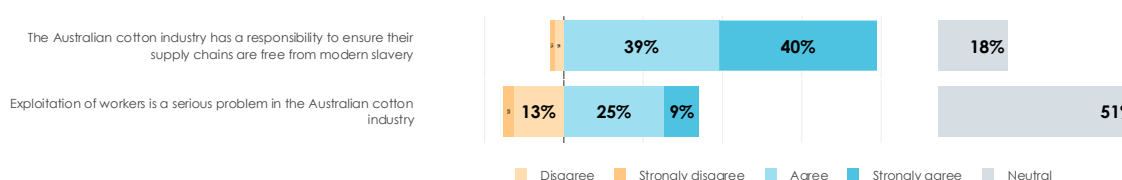


Figure 13: Distribution of responses to worker exploitation measures, 2025.

Community and industry information

For the first time this year we asked the community how informed they were about the cotton industry. In the context of communication, close to half of all participants could not recall or had never heard about the cotton industry before at 46%; 10% said they had heard about the industry in the last week; 14% in the last three months; 7% four to six months ago; and close to a quarter said the last time they heard about the industry was more than six months ago (Figure 14).

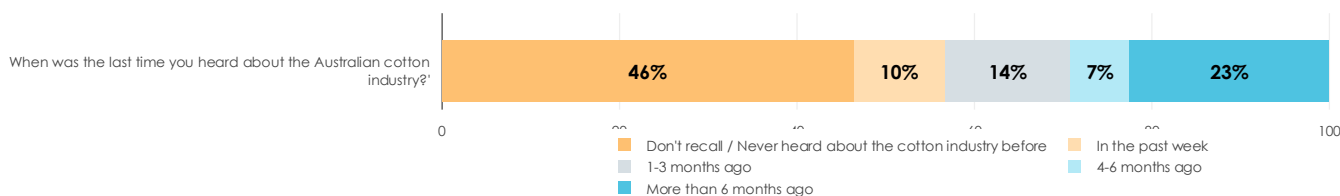


Figure 14: Distribution of responses to information about industry measures, 2025.

Participants who could recall the last time they heard about the industry were asked a follow up question asking what their source of information was (multiple choice). The top five sources were:

1. Internet (30%).
2. Television – news (21%).
3. Social networking, e.g. Facebook, X, Instagram, TikTok, etc. (16%).
4. Television – current affairs programs (13%).

5. Friends or family (12%).

One way of addressing communication through these various sources is by leveraging the experiences of those community members with greater industry exposure. Looking at two areas of the House of Cotton like responsiveness and regulation show that those who know more in the industry are more likely to agree to the associated statement, shown in Figure 15 below. Showcasing the experiences of those who know more people in the industry through channels like the internet or the news may help align sentiment of how the industry responds to community concerns and implements best practice.

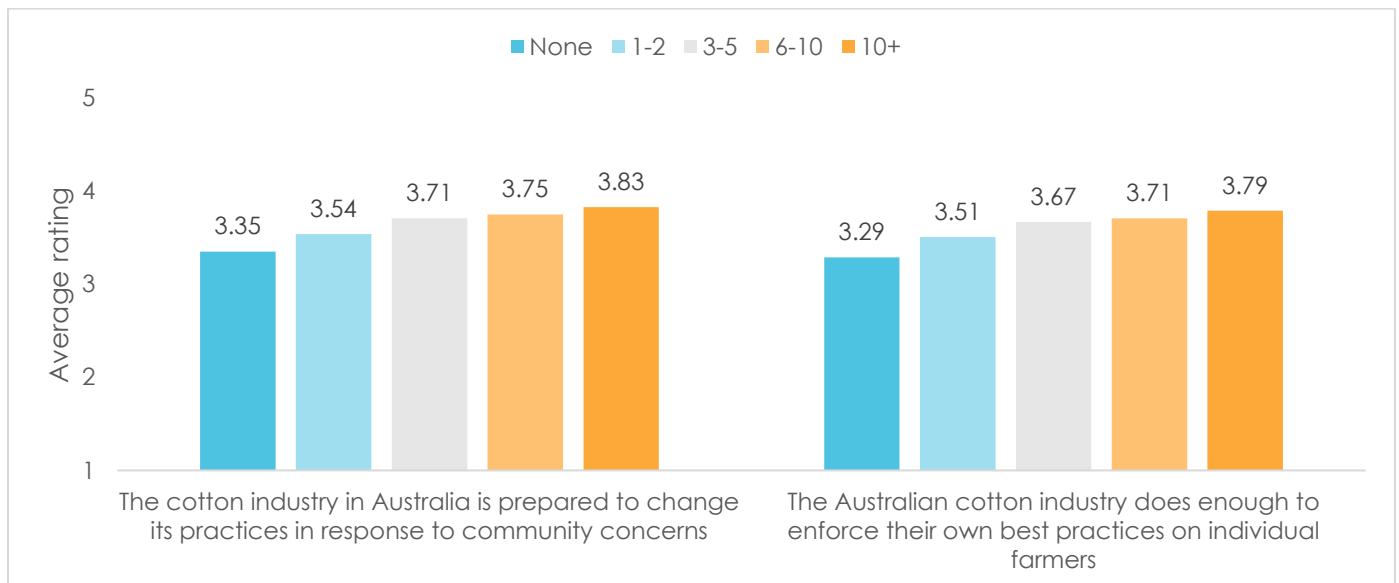


Figure 15: Average scores for responsiveness and regulation measures by people known in the cotton industry. 2025.

What's next?

Australians value the cotton industry for its continued contribution to the community and the economy. While trust and acceptance of the industry is strong, there are several factors that influence community perceptions of the industry as demonstrated in the House of Cotton framework. Foremost amongst these is environmental management, particularly around the responsible use of water, protecting biodiversity, and reducing greenhouse gas emissions. Being seen to be responsive to community concerns, like these environmental management issues, is critical for strengthening the relationship between the industry and the community. Similarly, being seen to share the benefits generated by the industry is equally important. The community agree that the industry has a responsibility to hold itself accountable and meet regulations, particularly when individual farmers break the rules, as well as ensure supply chains are ethical. Elevating the experiences of those in the industry, particularly on areas the community have signalled a desire for action on, may help engage those who are more disconnected from the Australian cotton industry.

But what does the community desire to see? Towards the end of the survey, participants were asked the question “**what would make you trust the Australian cotton industry more?**”. Four key themes emerged of transparency, accountability, awareness and environmental management, highlighted in the boxes below. Being transparent about the activities of the industry speaks to responsiveness as well as accountability, which in turn influences perception of regulation and environmental management of the industry. Emphasising these themes in connection with the House of Cotton framework will provide a bedrock on which the industry can build both greater awareness as well as strengthen its relationship with the Australian community.

Transparency

“Being more transparent about their activities.”

“More transparency.”

“Transparency of earnings and expenses.”

“If they were open and honest.”

Accountability

“I hope that they do the right thing by everyone.”

“Making sure they follow the rules.”

“If I knew it was properly regulated.”

“If they were above board regarding their practices.”

Awareness

“Hearing breaking news about the positives.”

“More information about their practices.”

“Knowing more about its operations.”

“Knowing about the farmers.”

Environmental management

“Better organic farming process.”

“The clear positive impact toward environment.”

“To innovate ways of growing cotton with less harm to the environment.”

“It uses water responsibly.”



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