

# Community Sentiment Research

Jul 2023



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# Methodology



15-minute  
online survey



n=1504 main grocery  
buyers and meal  
preppers aged 18-64,  
living in metro  
Australia



Conducted annually  
in May / June  
since 2010



Conducted by Pollinate:  
an external market  
research agency to  
ensure confidentiality  
and data integrity

# Sample: 2023

A robust, representative sample of n=1504 main grocery buyers and main meal preppers aged 18-64, across the five main capital cities

## Gender



Female

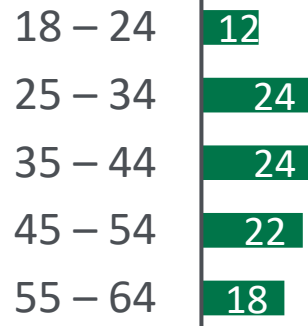
63



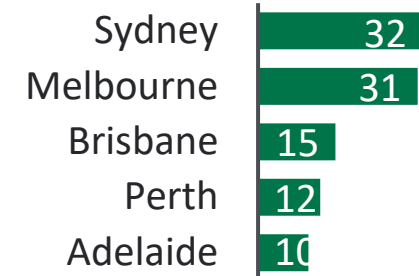
Male

37

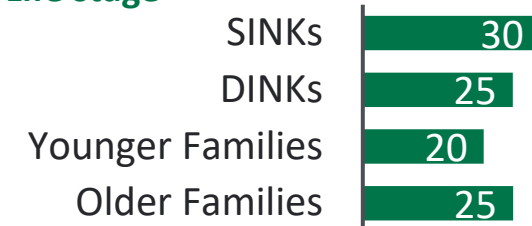
## Age



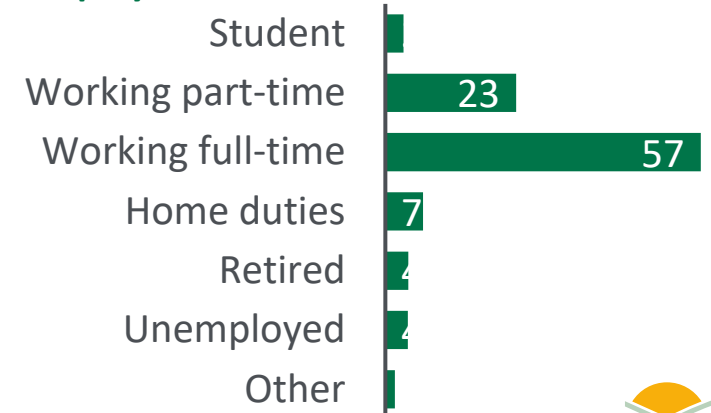
## Location



## Life stage



## Employment





## Key insights

- Red consumption trends stable but overall in slight decline
- Cost is main reason for reducing red meat consumption
- Red meat industry perceptions mainly positive and improving
- Knowledge of the industry influences perceptions
- Humane production practices and sustainability commitments are important for consumers
- Many consumers are keen to learn more about the industry

**Implication:** Continue to focus on environmental action, ethical practice and community alignment of our industry to improve perceptions further and maintain trust.







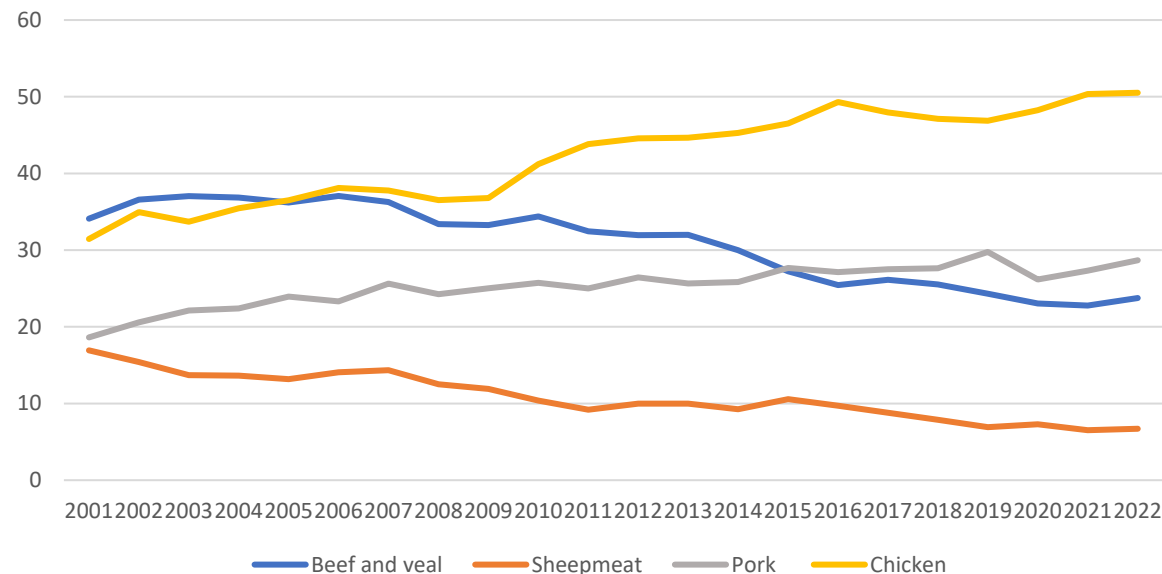
# Consumption

# Australian consumers continue to eat a significant amount of meat in total on a per capita basis, with the mix of proteins changing significantly over time

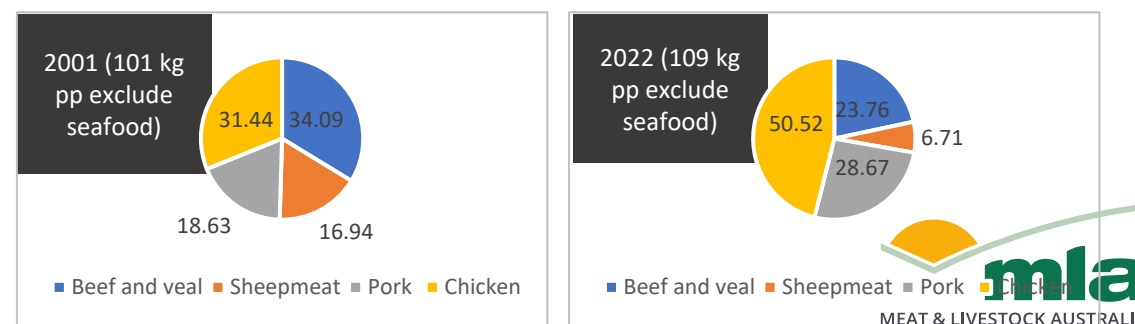
## Over 20 years...

- Volume has increased by 8kg per person (101kg -> 109kg)
- Chicken is 50% of volume consumed and continues to increase
- Beef and lamb show a gradual decrease

PCC consumption (kg) CY 2001-2022

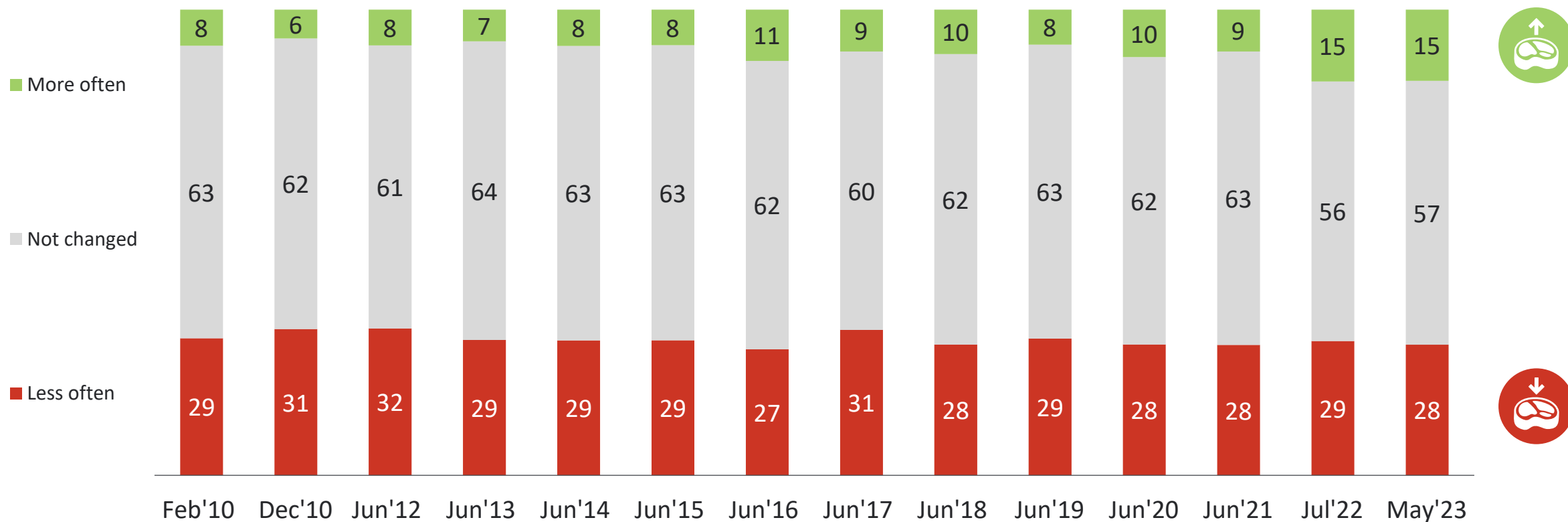


AU Per Capita Fresh Meat Consumption CY 2001 vs. 2022



# Claimed consumption trend relatively stable -red meat reducers still make up just over a quarter of the population

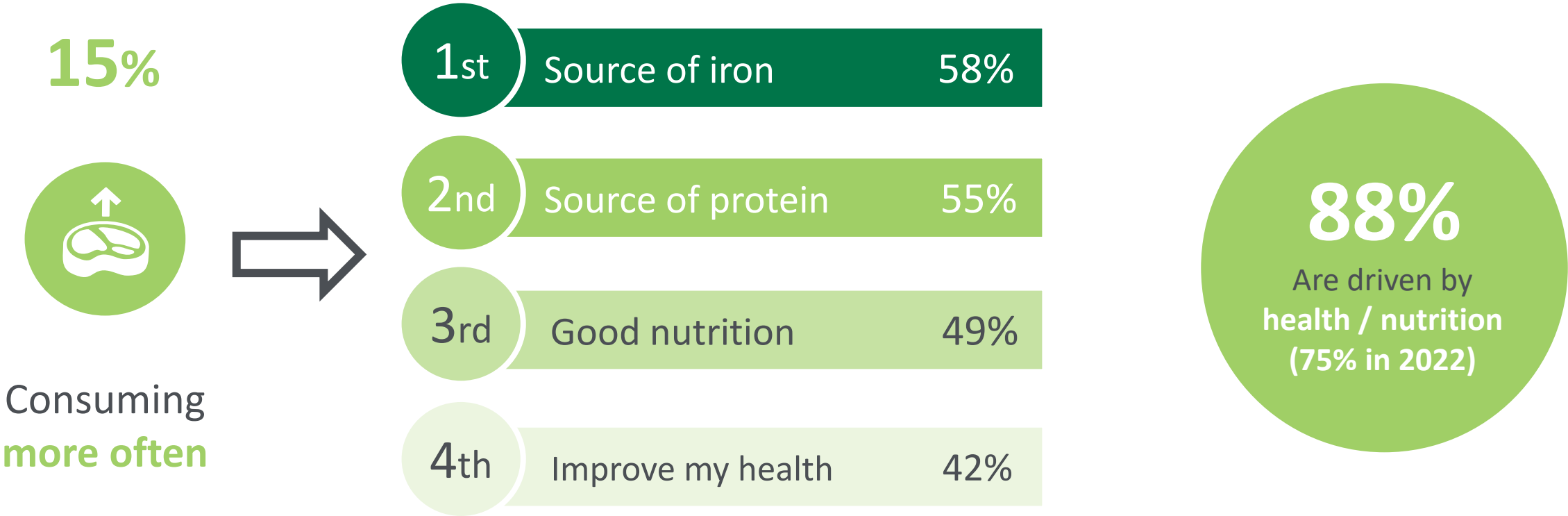
Red meat consumption vs. 1 year ago (%) – Among meat eaters





# The top reasons for increasing red meat consumption revolve around health and nutrition, particularly iron and protein

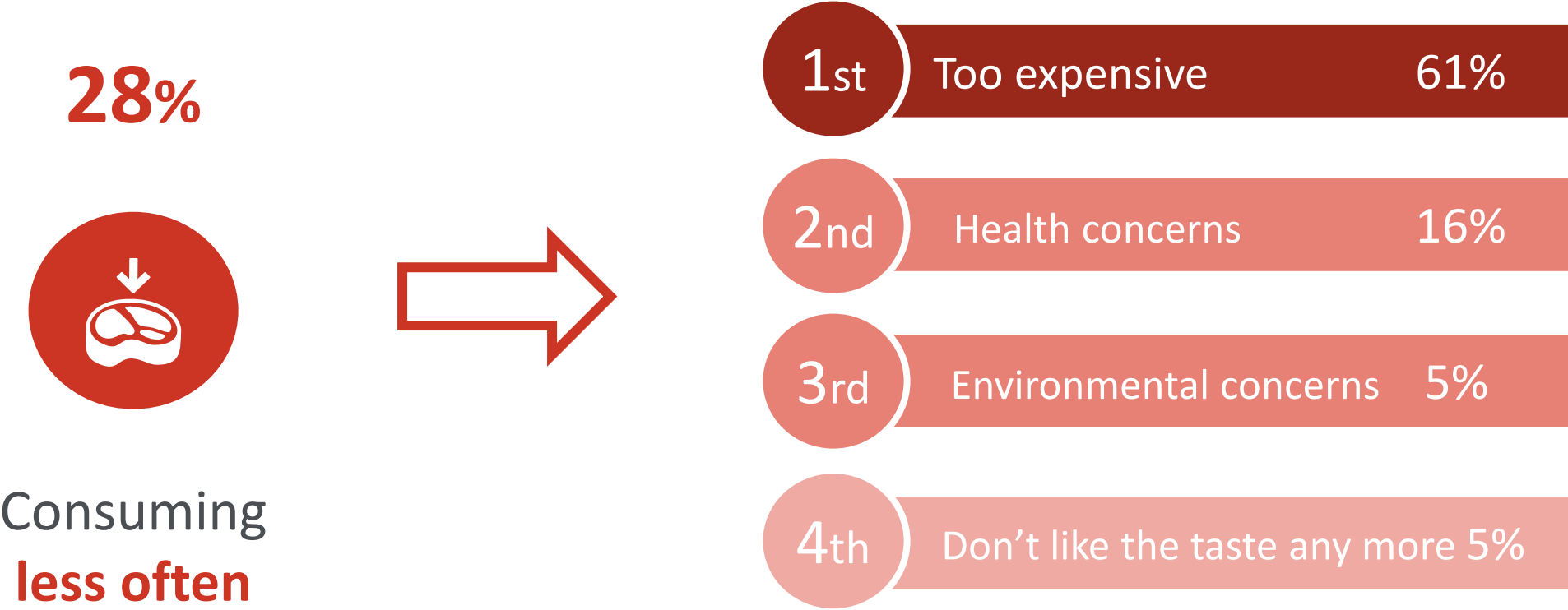
Top reasons for eating more red meat (%) | Red meat increasers



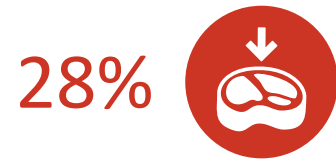
QA7A You mentioned you are eating more red meat now. Why is that? Base: Those eating more red meat (May'23 n=217)

# As expected, cost is by far the main reason for reducing red meat consumption

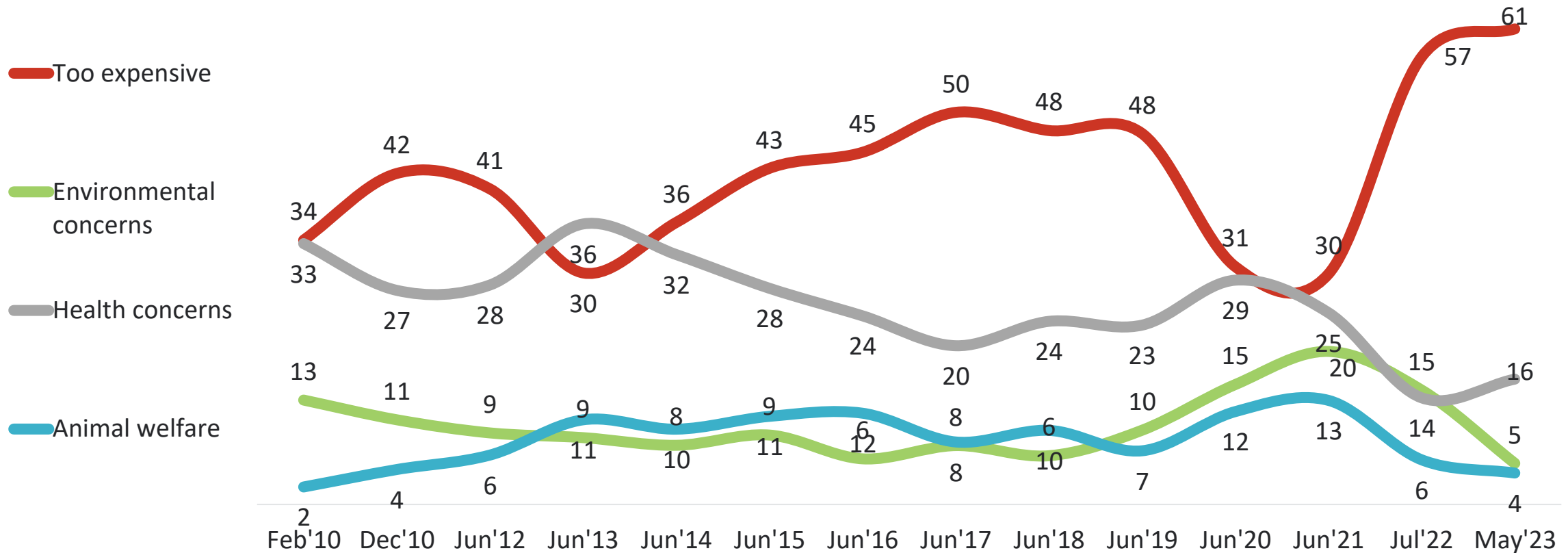
Top reason for eating less red meat (%) | Red meat reducers



# Cost remains very high following the big jump last year



Top reason for eating less red meat (%) | Red meat reducers



A9. And which ONE of the following best describes why you have reduced the amount of red meat you are eating?

Base: Those eating less red meat (n=224-437)

# Only 5% of Aussies identify as vegetarians / vegans, *the lowest figure to date*

5% 

Are you a vegetarian? (%)



# True Vegetarians/ Vegan represent a consistently small proportion of the population







# Community perceptions of the industry



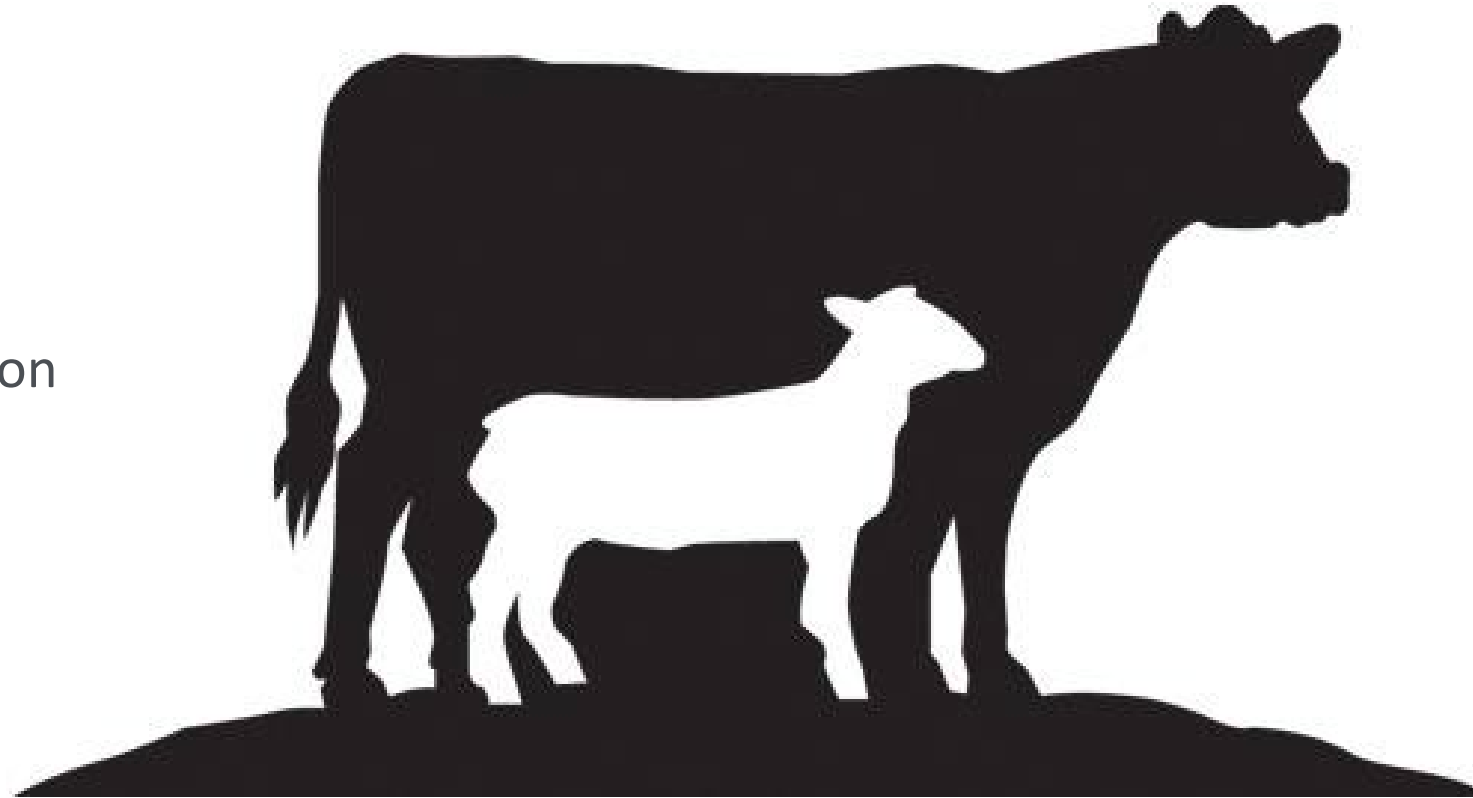
# For most Australians, red meat *production* isn't top of mind

Thought about beef/lamb production in last month (%) – Among meat eaters



**24%**

beef production

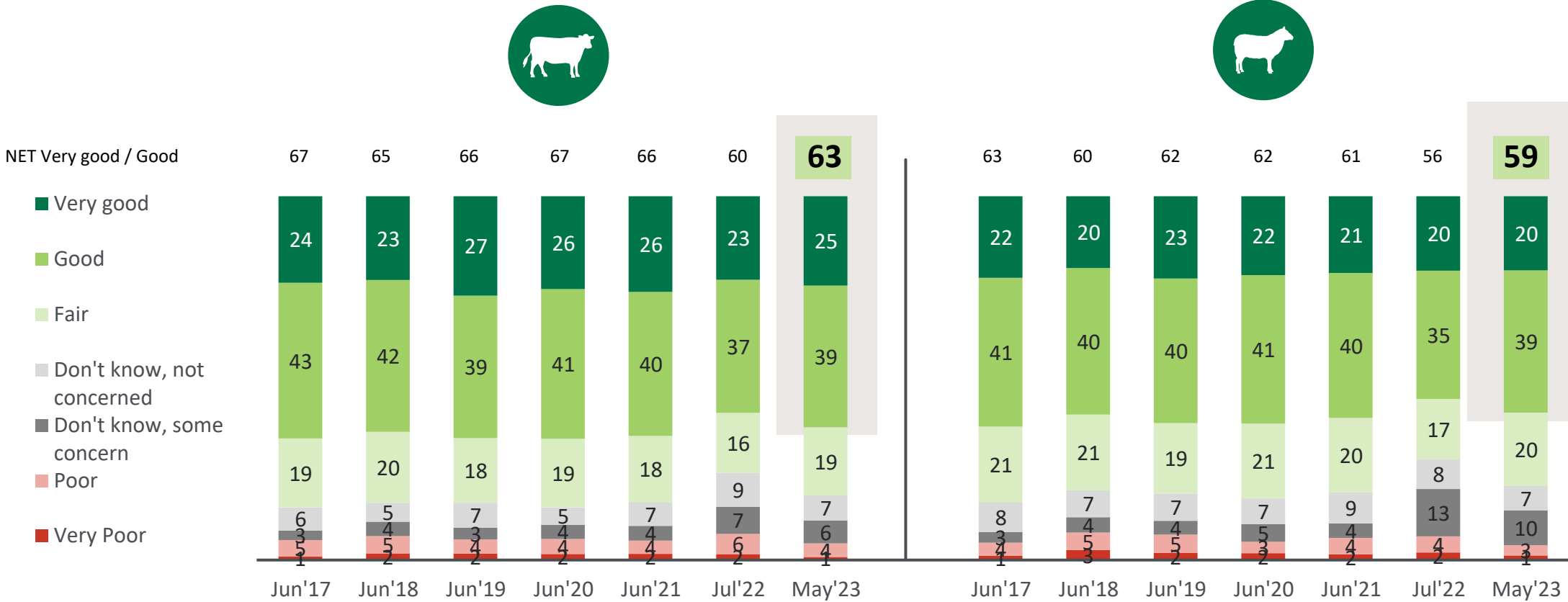


**18%**

lamb production

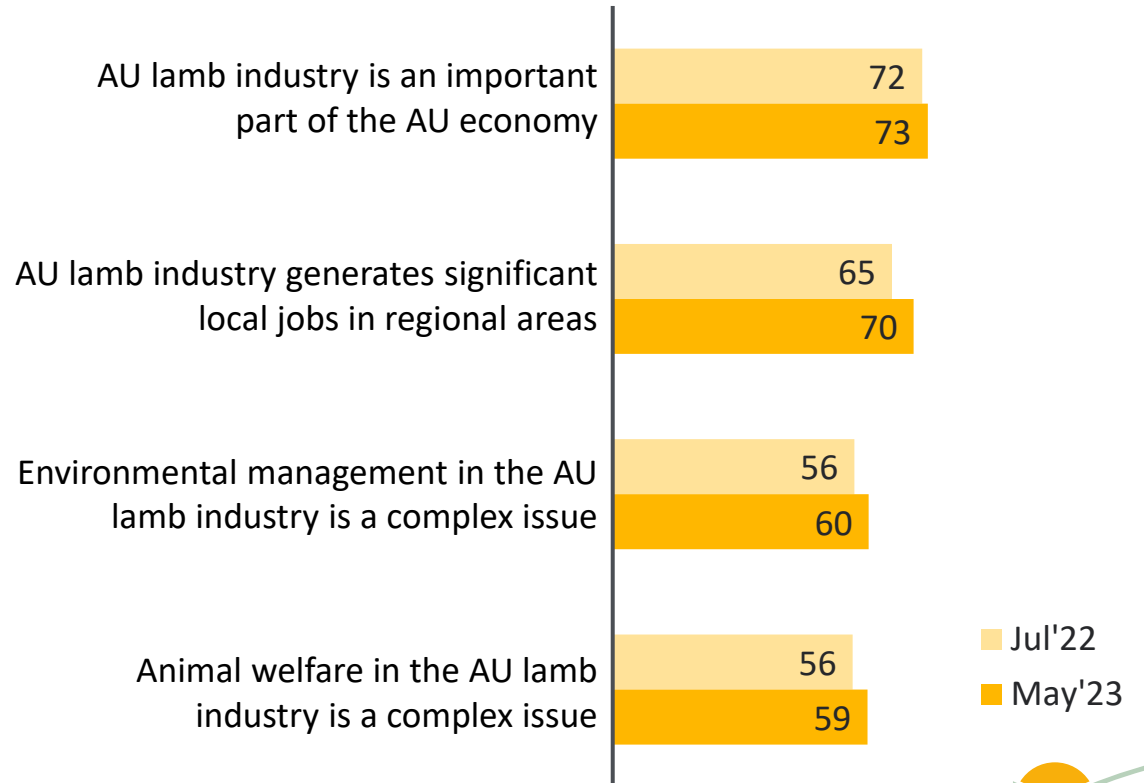
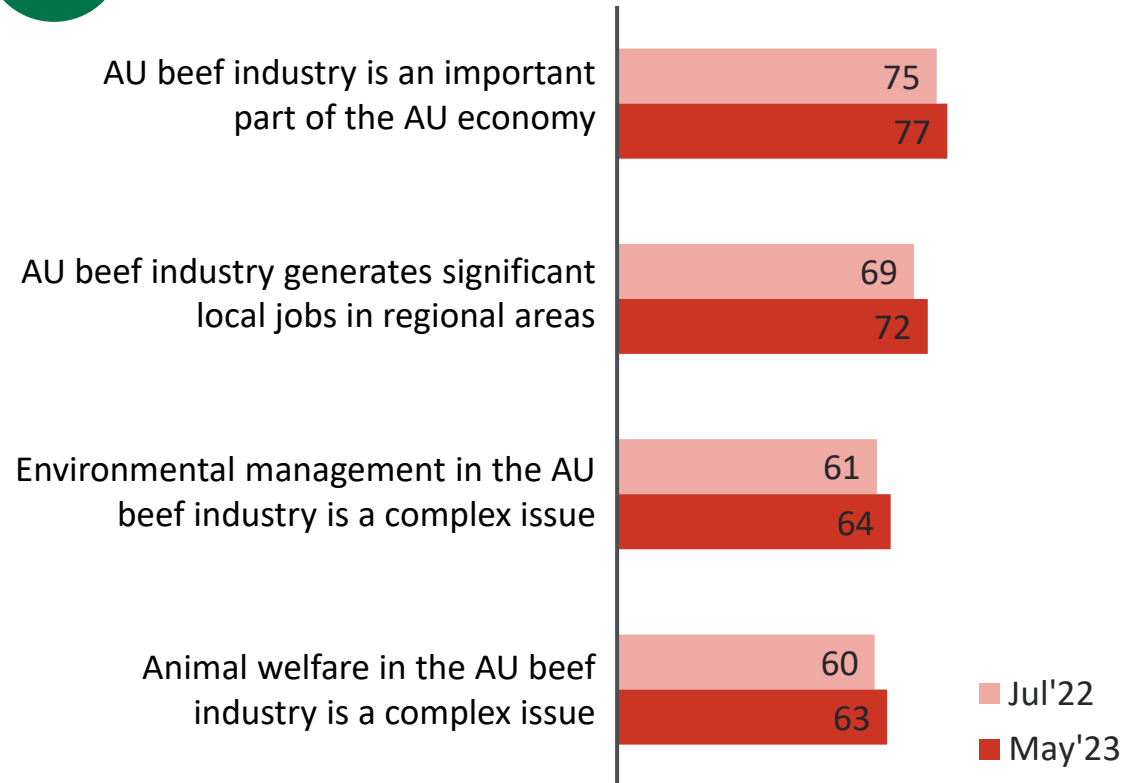
# Overall perceptions of the red meat industry are mostly positive: *an increase compared to last year; few have negative perceptions*

Consumer perceptions of Australian producer industries (%) – Among meat eaters



# Most Aussies see the red meat industry as vital to the Australian economy and job creation

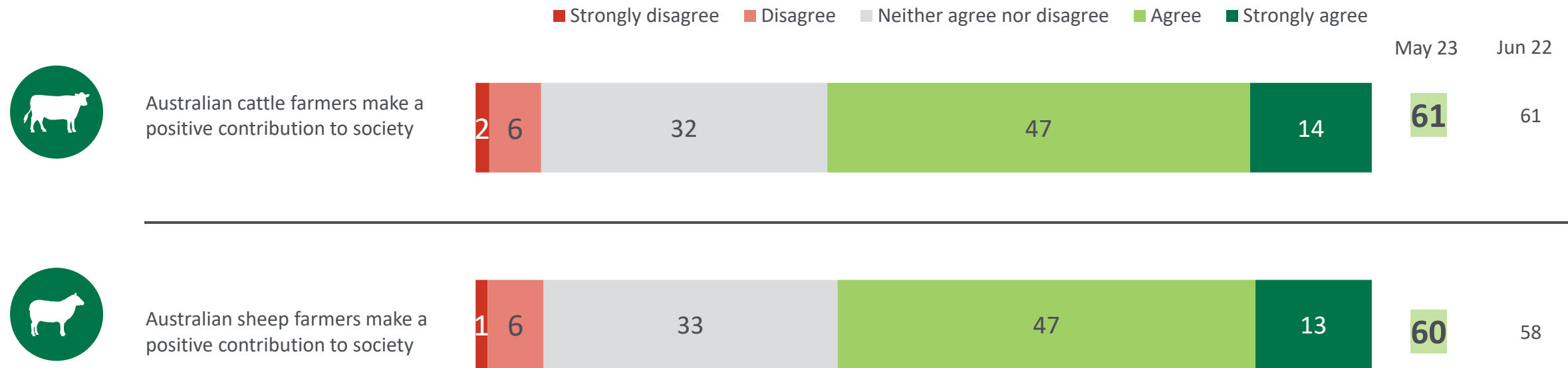
Attitudes about the AU beef/lamb industry (%) – NET Agree



Jul'22  
May'23

# Furthermore, most Aussies feel cattle and sheep farmers contribute positively to Australian society

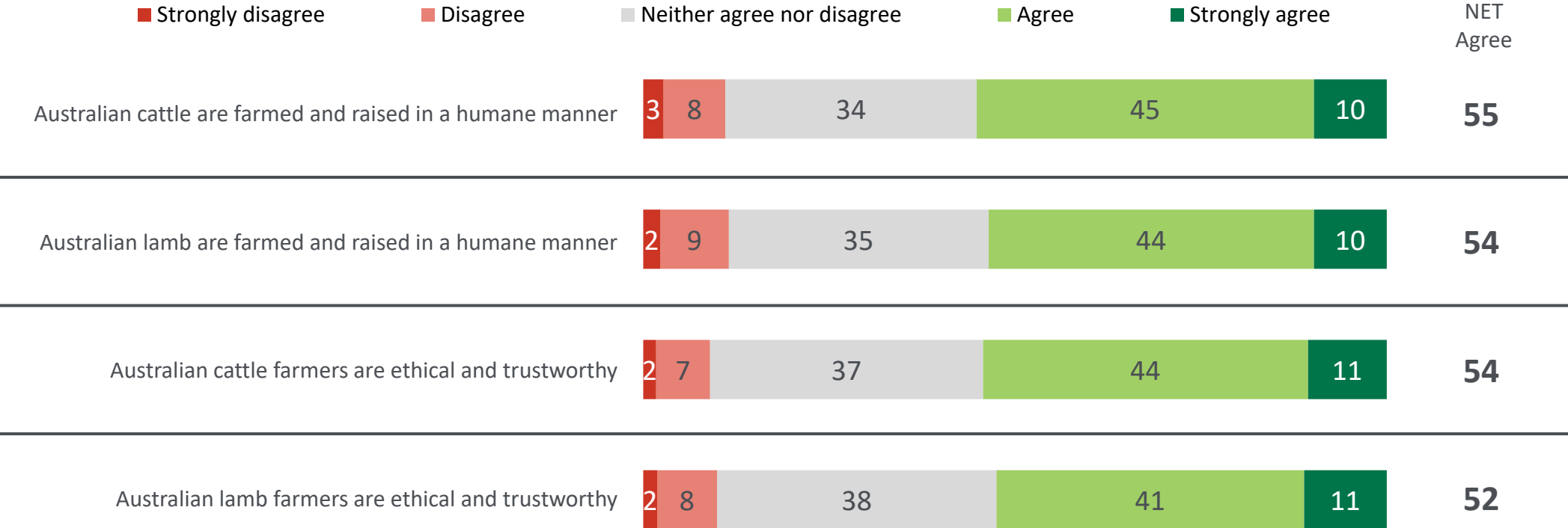
Attitudes towards beef/lamb industry (%)



B1. Please indicate how much you agree or disagree with the following statements. Base May'23 n=1503

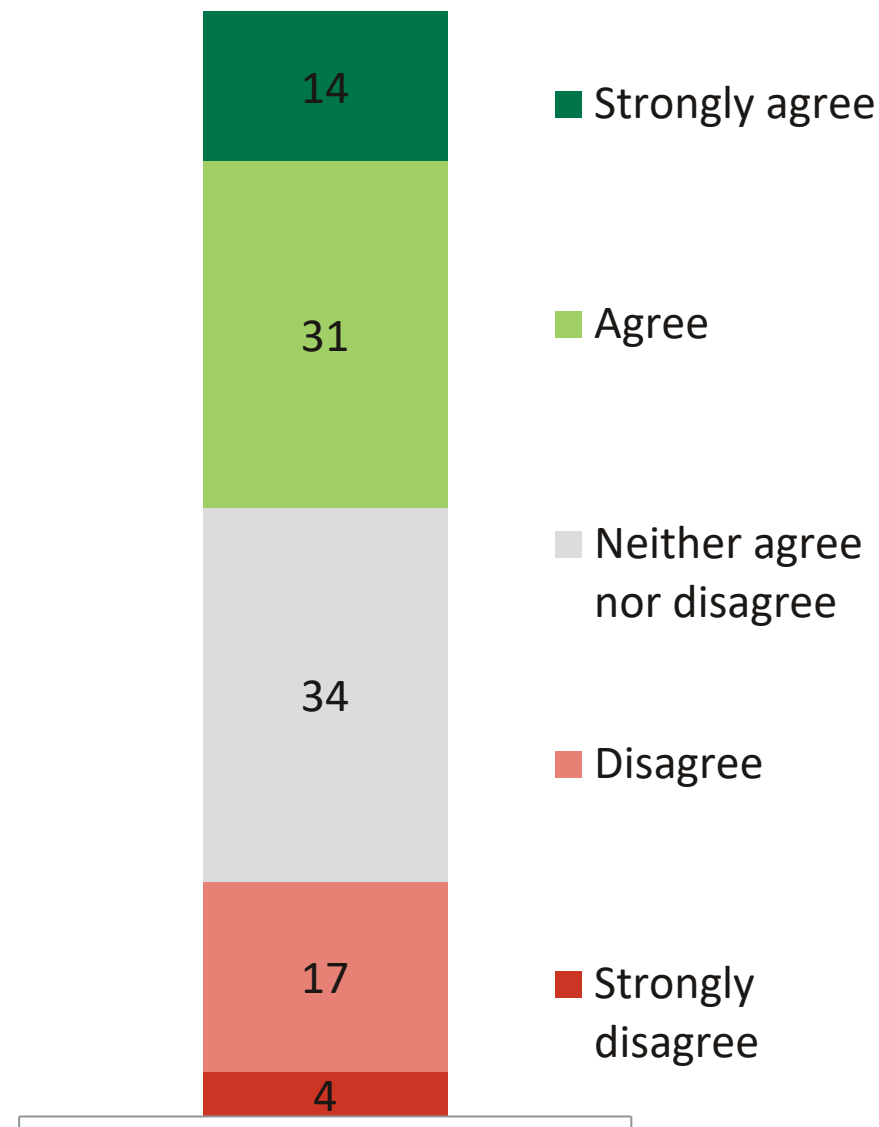
# Most agree farmers are ethical and raise animals humanely

## Attitudes towards cattle/lamb farmers (%)



# The average meat eater would prefer not to think about how red meat gets on their plate

Attitudes towards red meat (%): meat eaters

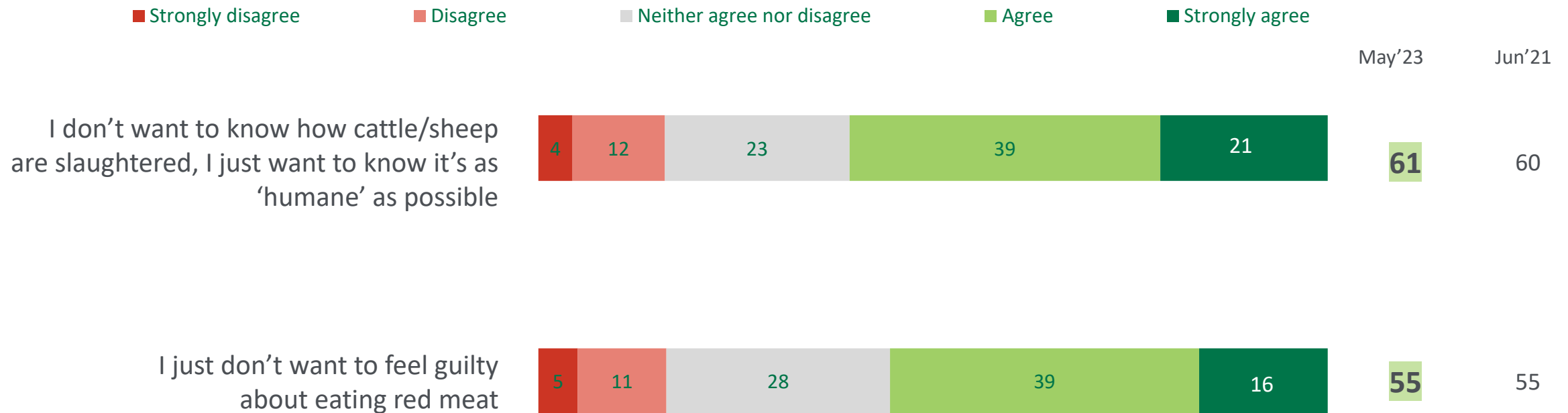


I try not to think about the production of red meat, I'd rather not know



# When it comes to animal welfare, people want assurance that cattle and sheep are slaughtered humanely *but they don't want to know the details or feel guilty*

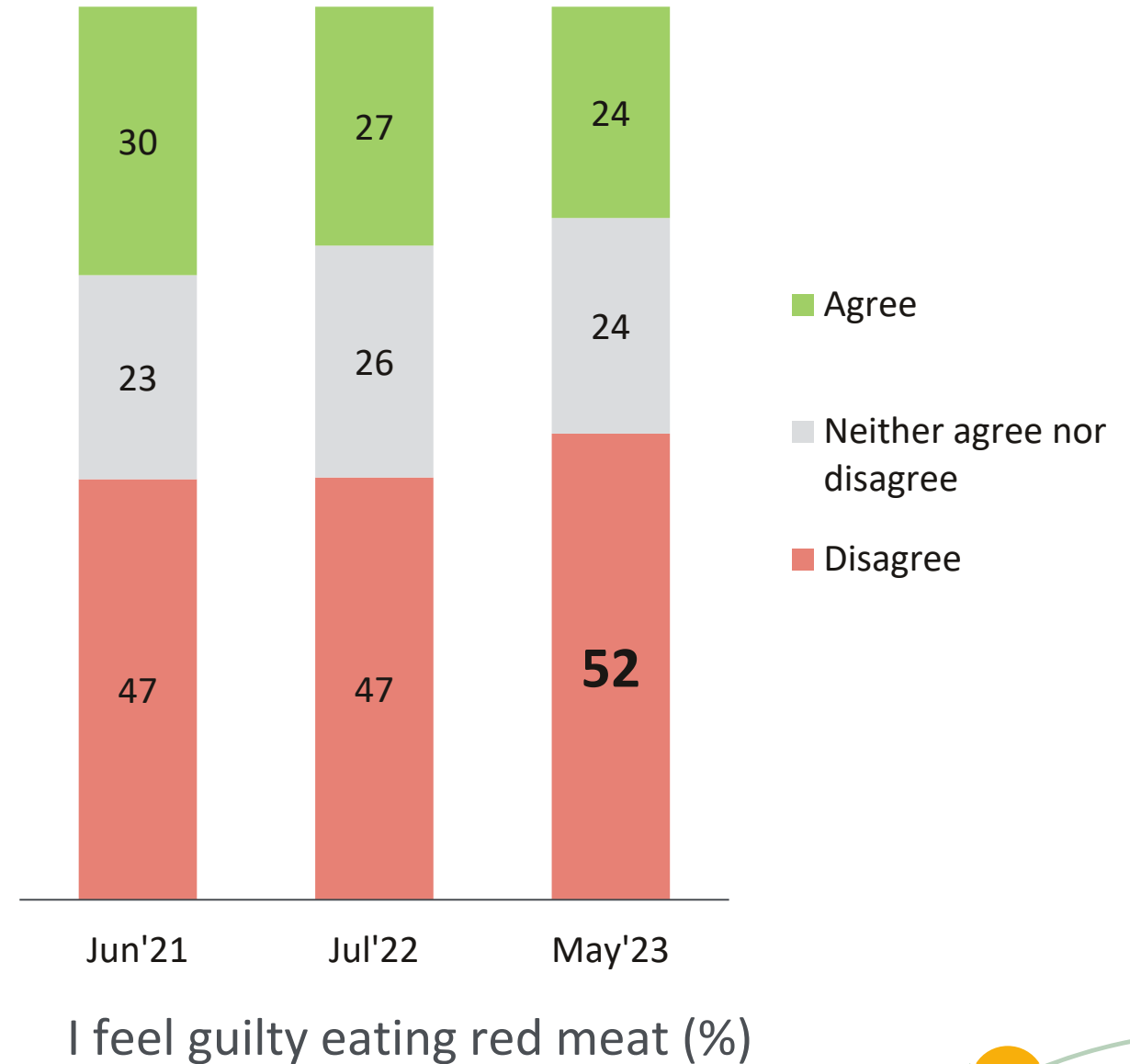
Attitudes towards cattle/lamb farmers (%)



Majority of people do ***NOT feel guilty*** about eating red meat.

Fewer people are feeling guilt about eating red meat.

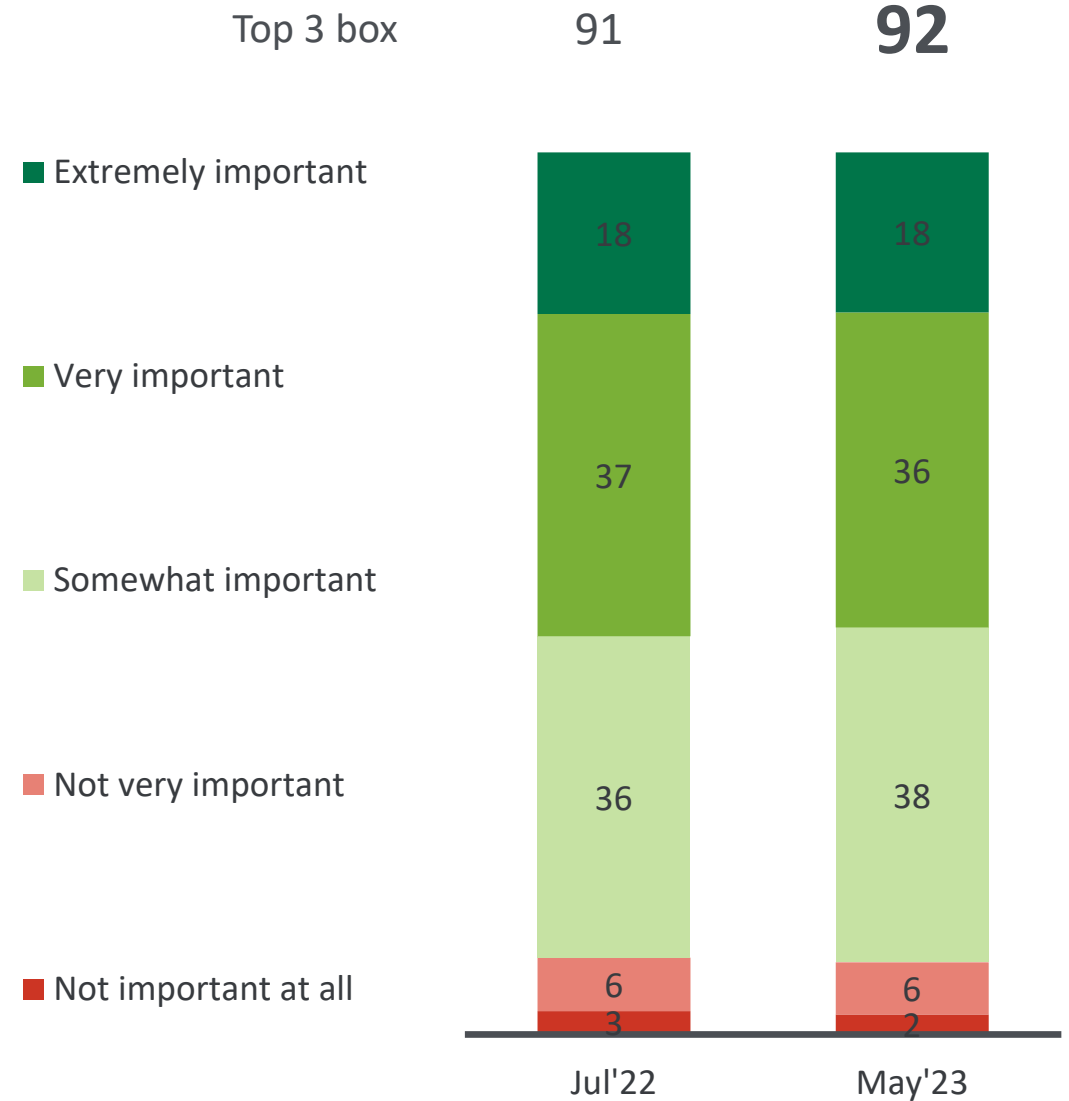
*Maybe because overall perceptions have increased this year??*





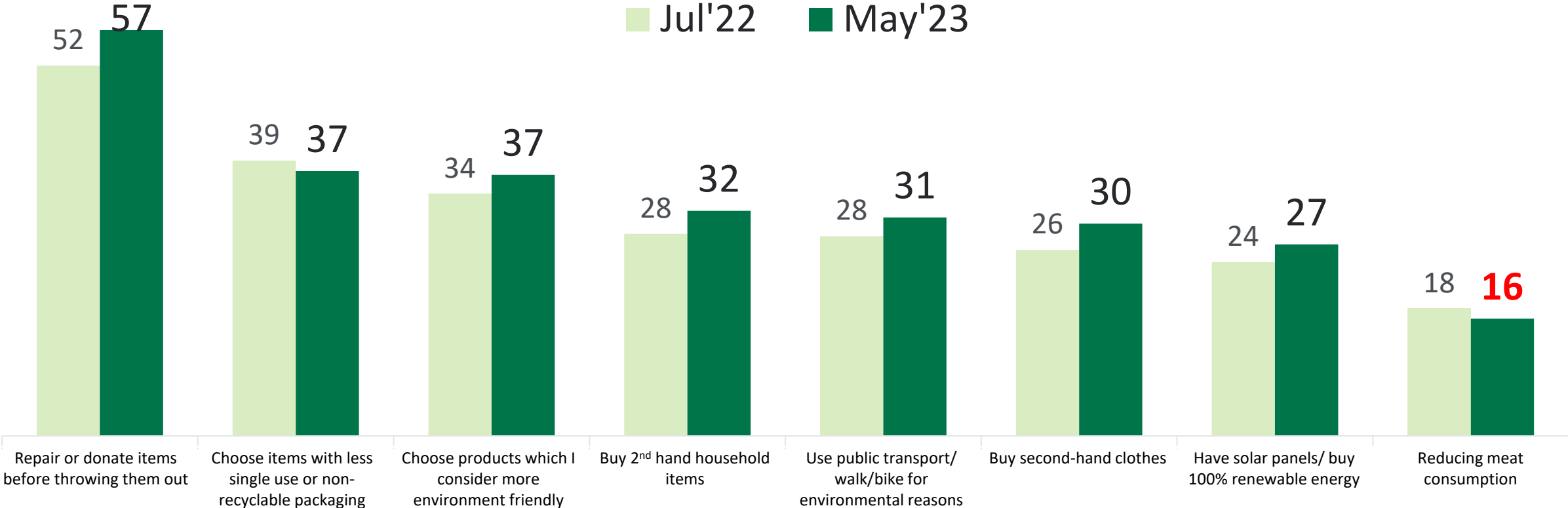
# Sustainability is important to Australians

Importance of sustainability to you (%)



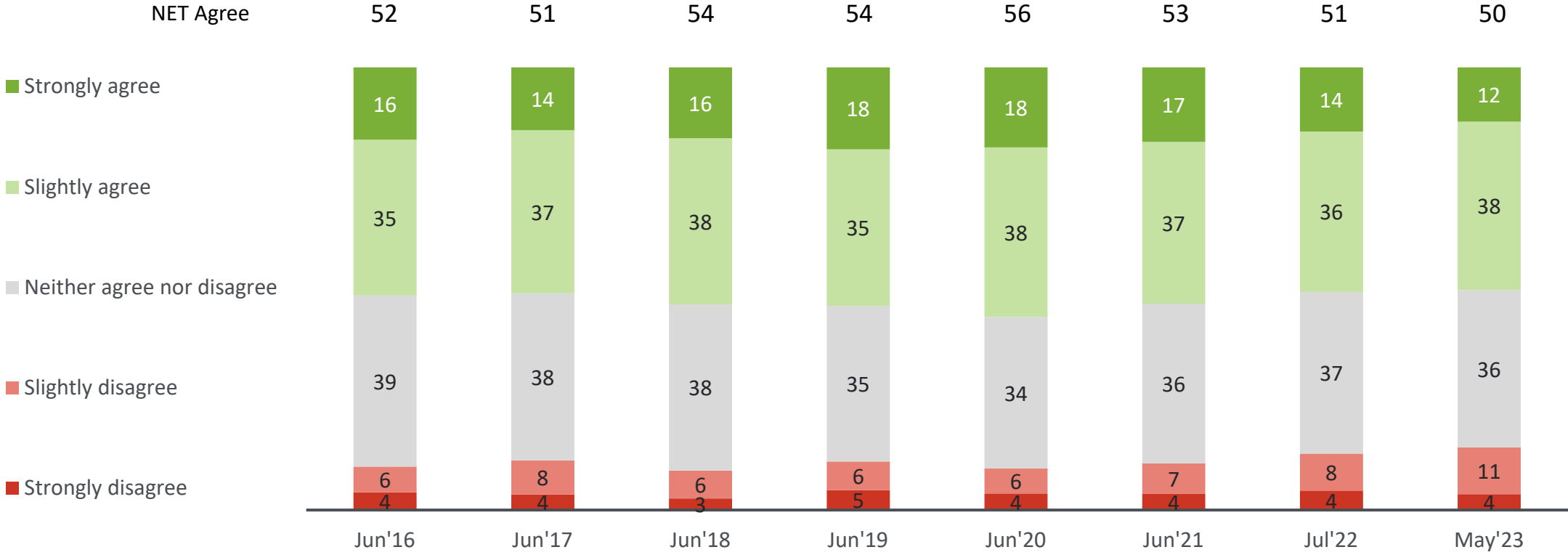
# And since last year there has been a slight increase in actions to reduce environmental impact, *with fewer reducing red meat*

Sustainable actions you do (%)



# While half agree that the industry is committed to sustainable production, some are still unsure

‘Australian cattle and sheep industry is committed to sustainable production’ (%)



# To overcome this uncertainty, some will need convincing that the industry is doing all it can for the environment, as some are unsure

Attitudes towards beef/lamb industry (%)

■ Strongly disagree   
 ■ Disagree   
 ■ Neither agree nor disagree   
 ■ Agree   
 ■ Strongly agree   
 NET Agree



Australian beef is environmentally friendly and sustainable



The Australian beef industry is doing all it can to reduce its impact on the environment



Australian lamb is environmentally friendly and sustainable



The Australian lamb industry is doing all it can to reduce its impact on the environment

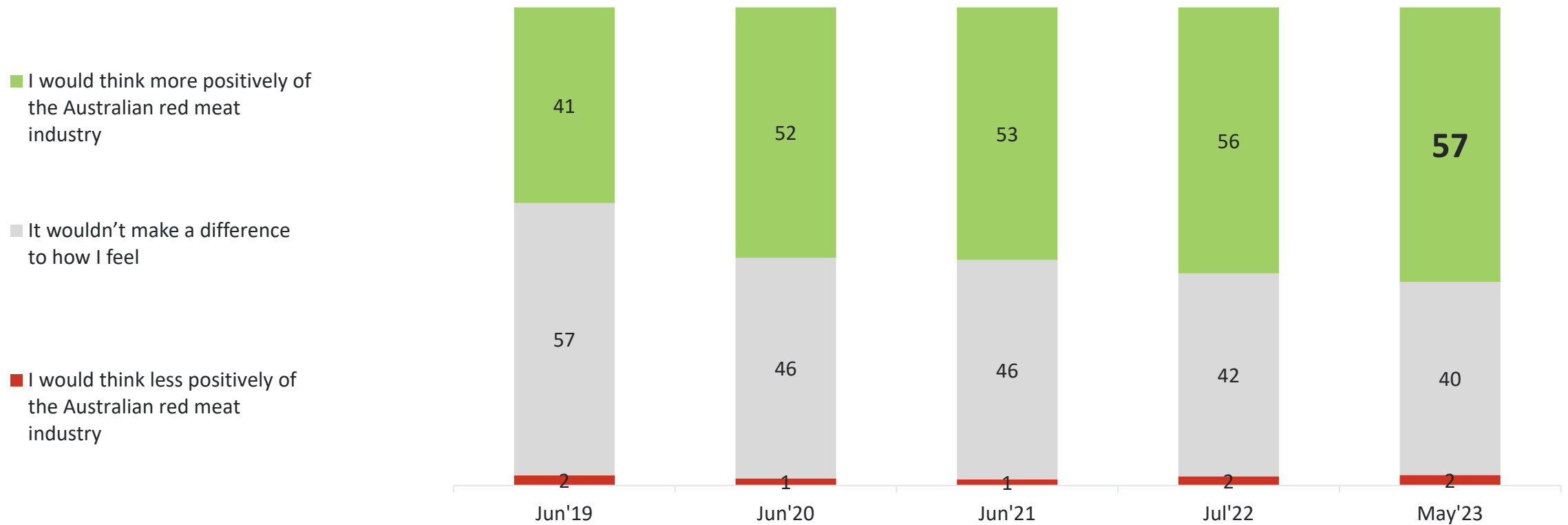




# Commitment to by the red meat industry to NET zero GHG by 2030 has a *positive impact* on perceptions of the industry



If AU red meat industry can reduce greenhouse gas emissions to zero by 2030 .....(%)

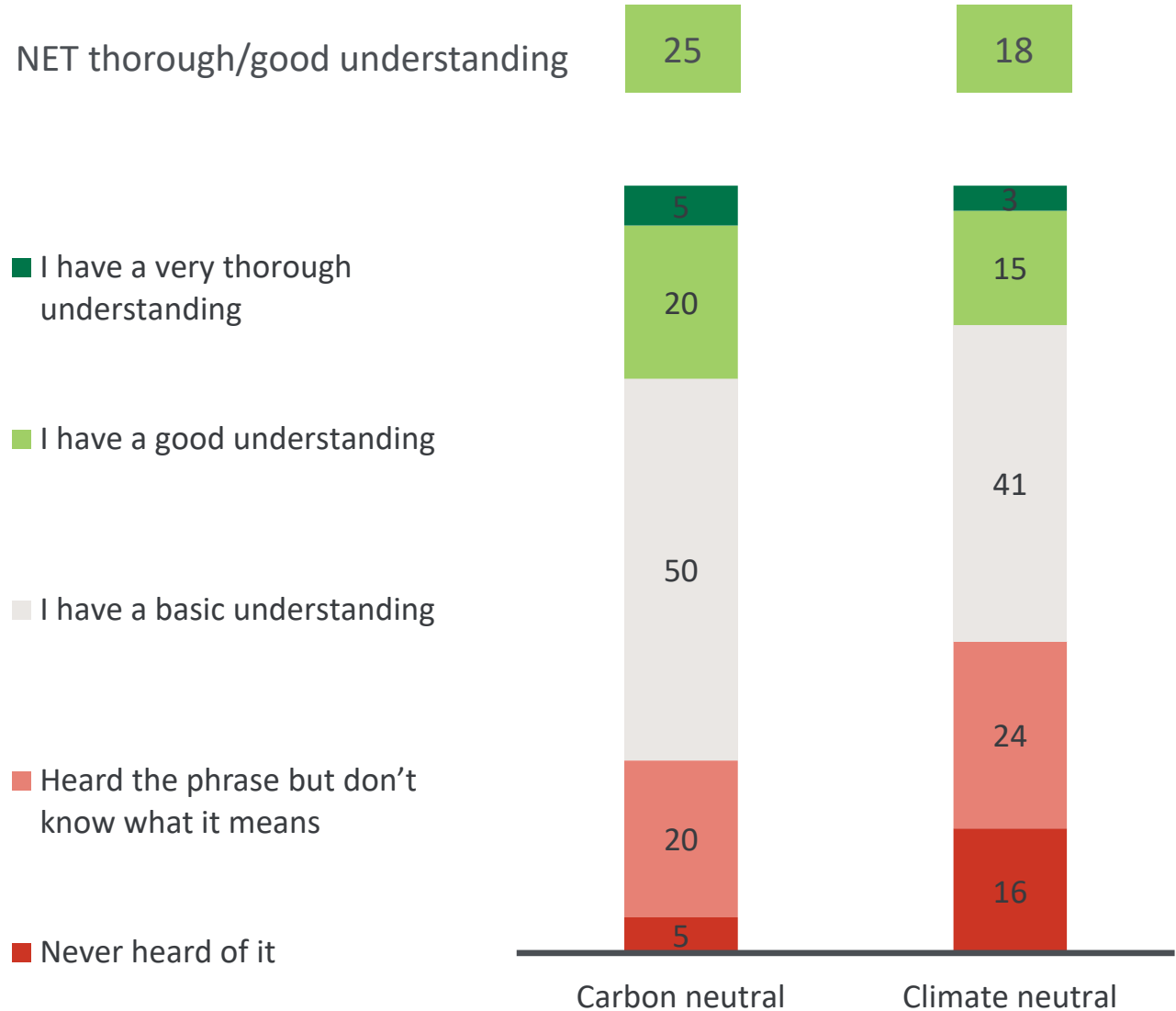


However ...

Minority have a good understanding of what 'carbon neutral' means.

Even fewer understand what 'climate neutral' means

Level of understanding (%)





# Community's knowledge of the Industry



The average Aussie  
doesn't know much  
about the industry

*But many say they're  
open to learning more*



**28%**

think they have  
knowledge of the  
industry

**53%**

want to learn more  
about our industry

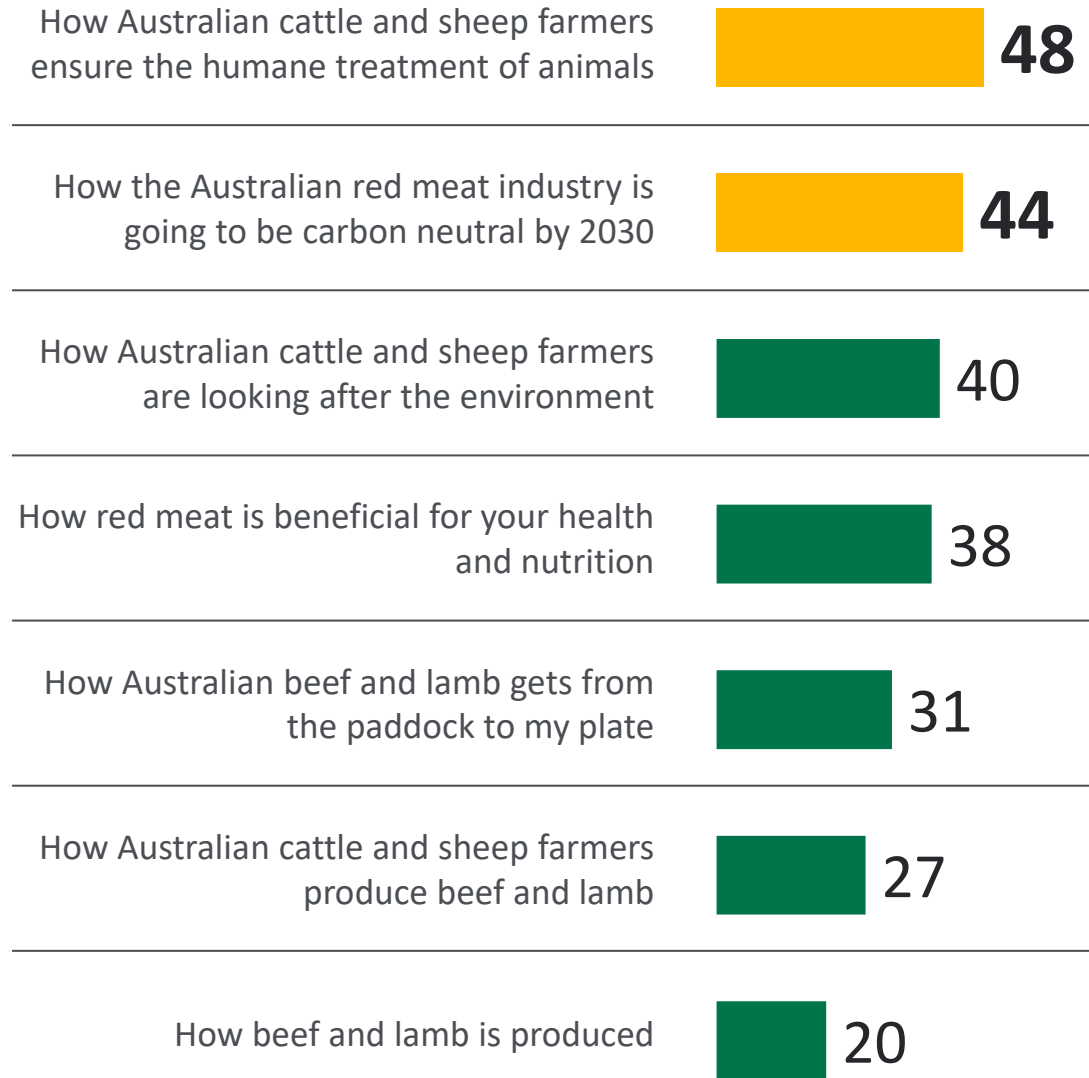


**71%**

think kids should be  
learning about the  
industry in schools






# Humane treatment and going carbon neutral are the areas consumers are most interested in hearing about

Interested in learning more about (%)



# Higher levels of industry knowledge is linked to *better perceptions*

*% of those who agree with the statement (T2B)*

	Total metro Australians	Those feeling knowledgeable about the industry	GAP (positive increase)
 I feel <b>good about the production</b> of beef in Australia	61	76	<b>+ 15</b>
 Australian cattle producers <b>care about the environment</b>	50	66	<b>+ 16</b>
 Australian cattle are <b>farmed and raised in a humane manner</b>	55	72	<b>+ 17</b>
 Australian cattle producers make a positive <b>contribution to society</b>	61	69	<b>+ 8</b>
 Australian cattle producers are <b>ethical and trustworthy</b>	54	70	<b>+ 16</b>

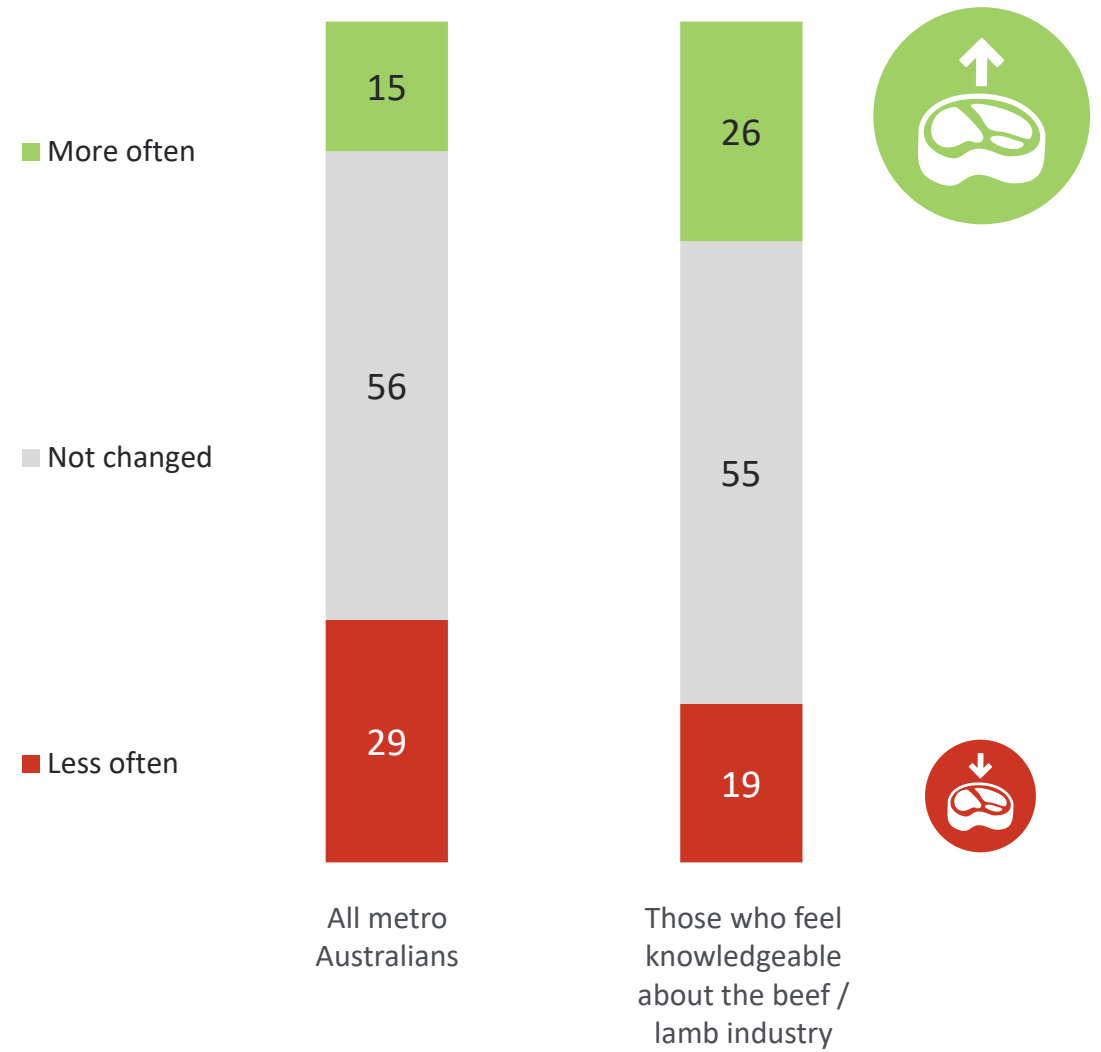


**And those who  
know more about the industry  
are likely to be eating more red meat**

**AND**

***fewer are reducing their red meat  
consumption***

Change in red meat consumption, vs.  
1 year ago (%) – Among meat eaters



# Majority of metro Aussies trust the Australian red meat industry

Trust in industry to do what is right (%)



66%



66%



# Compared to other industry sectors, the red meat industry is up near the top percentage of 'trusted' industries, shifting up vs. last year

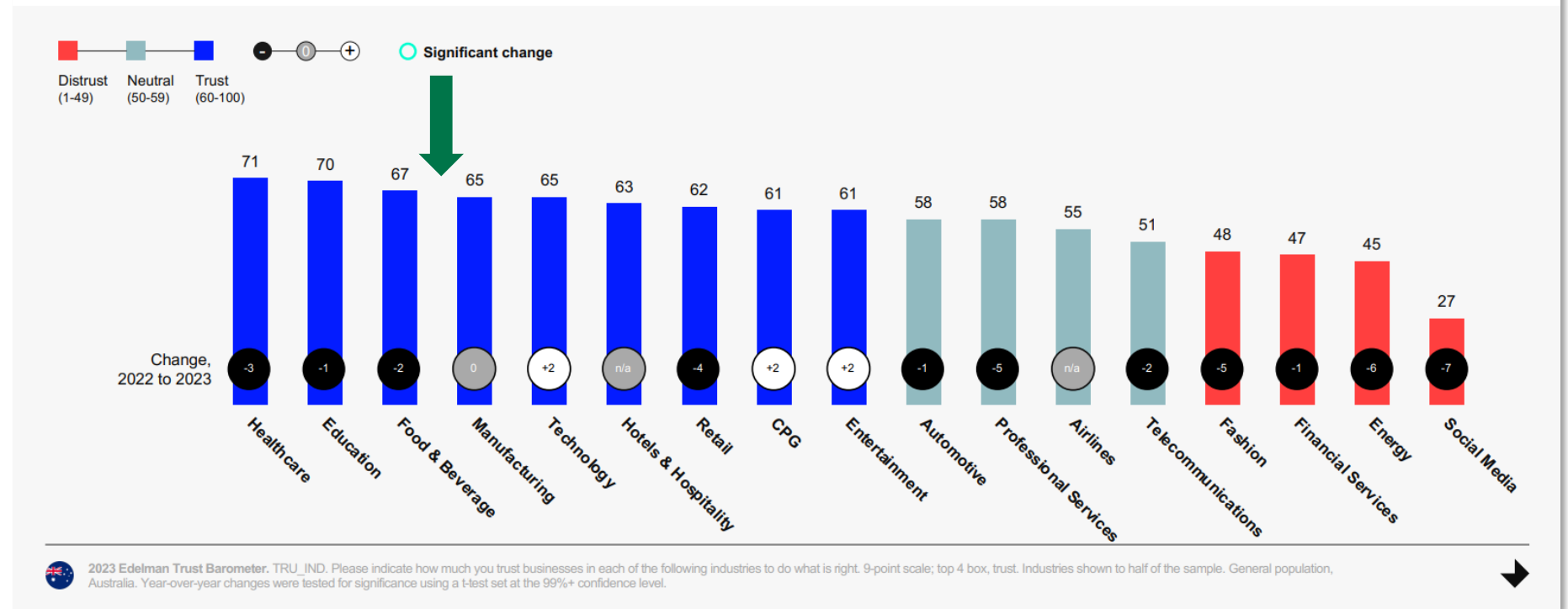
**66%** +5% vs. 2022

Australian beef industry

**66%** +6% vs. 2022

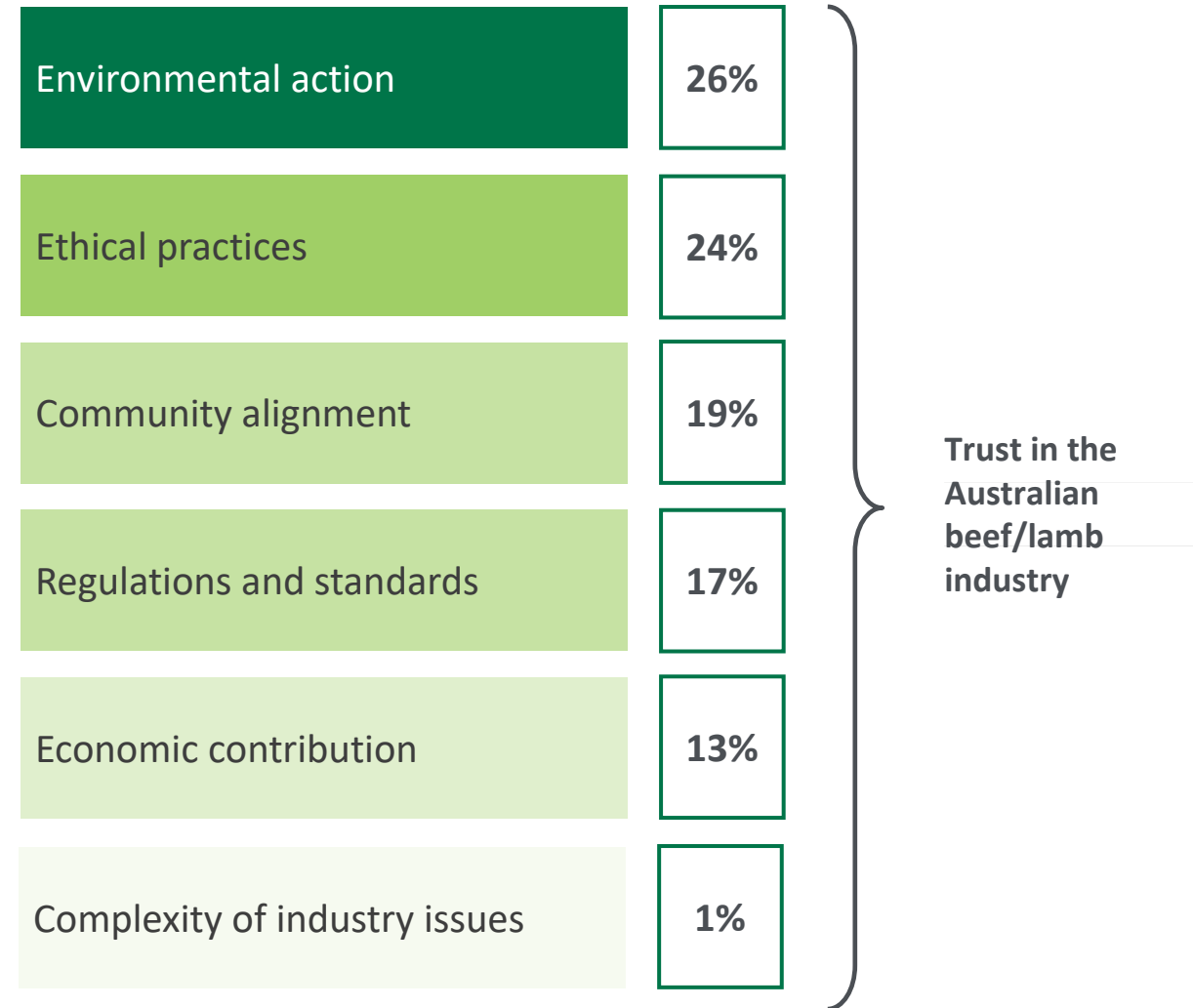
Australian lamb industry

Percent trust, in Australia



The top drivers of trust are environmental action, ethical practices and community alignment

### Drivers of industry trust (%)

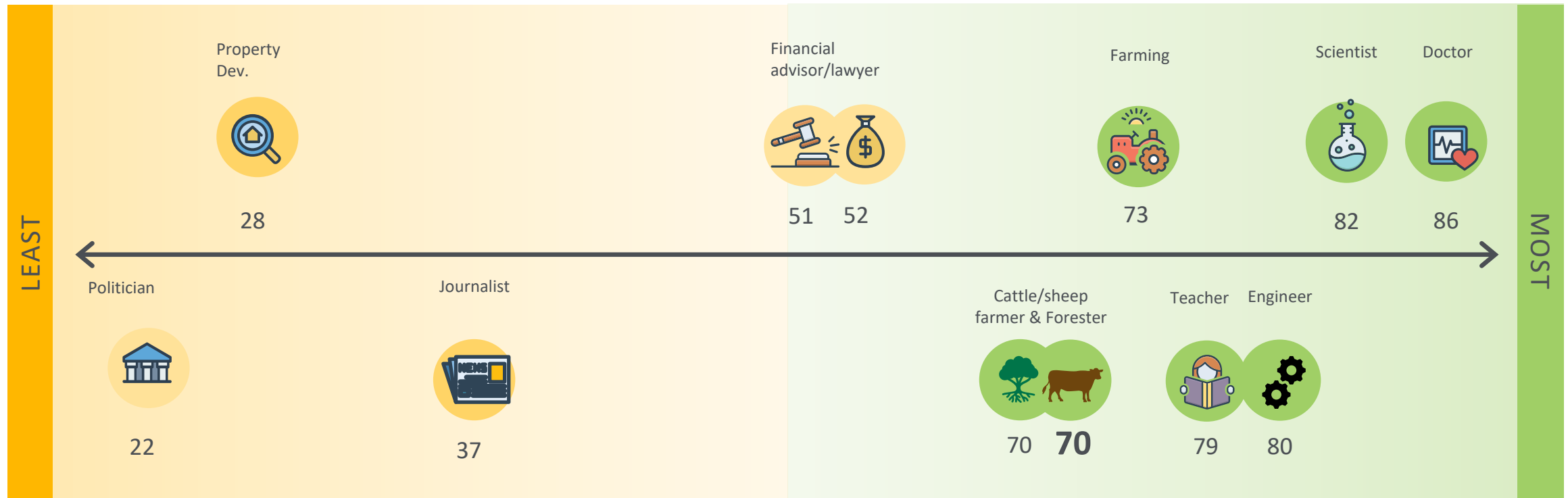


# Looking at the inputs into the trust drivers analysis...

<p><b>Ethical practices</b></p>	<p>Australian cattle/sheep are farmed and raised in a humane manner          Australian cattle/sheep farmers are ethical and trustworthy</p>
<p><b>Community alignment</b></p>	<p>The Australian beef/lamb industry is prepared to change their practices in response to community concerns          The Australian beef/lamb industry listens to and respects community opinions</p>
<p><b>Environmental action</b></p>	<p>I have confidence that cattle/sheep farmers are reducing their net greenhouse gas emissions          The Australian beef/lamb industry is doing all it can to reduce its impact on the environment          Australian beef/lamb is environmentally friendly and sustainable          Australian cattle/sheep farmers care about the environment          Australian cattle/sheep farmers make a positive contribution to society</p>
<p><b>Economic contribution</b></p>	<p>The Australian beef/lamb industry generates significant local jobs in regional areas          The Australian beef/lamb industry is an important part of the Australian economy</p>
<p><b>Complexity of industry issues</b></p>	<p>Animal welfare in the Australian beef/lamb industry is a complex issue          Environmental management in the Australian beef/lamb industry is a complex issue</p>
<p><b>Regulations and standards</b></p>	<p>Standards developed for the Australian beef/lamb industry ensure people in those industries do the right thing          Current regulation of the Australian beef/lamb industry is effective</p>

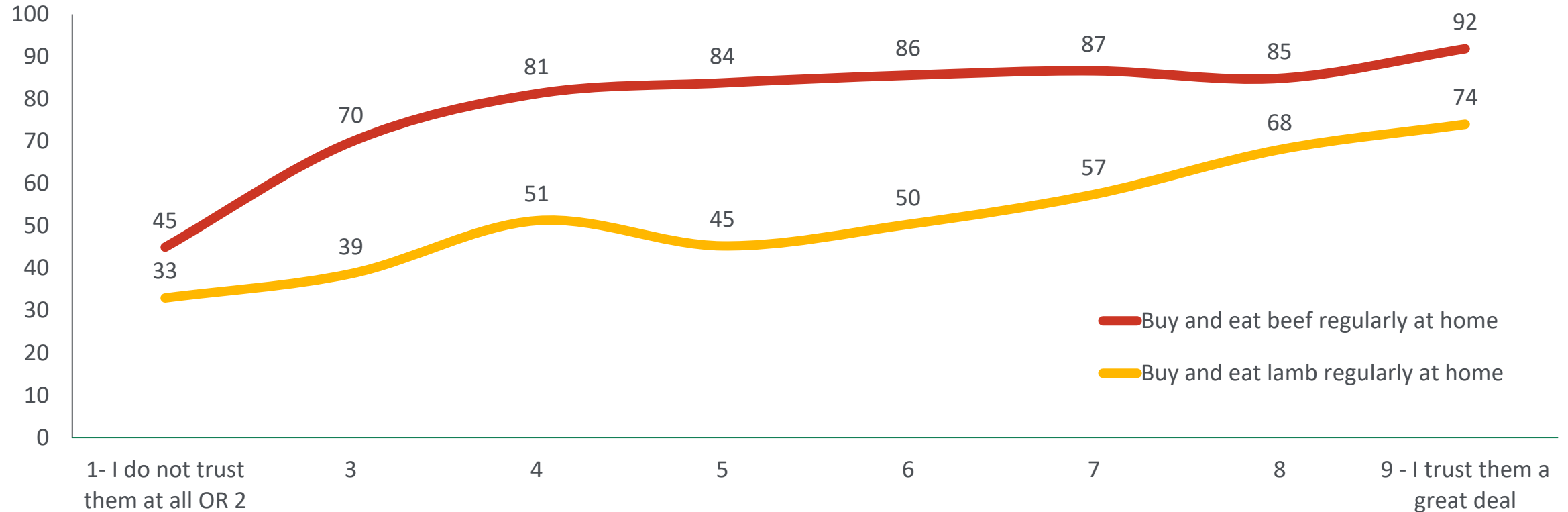
# Most Aussies trust cattle and sheep farmers, similarly to adjacent professions - farmers and foresters

*The spectrum of industry trust*



# Higher trust in industry is correlated with higher consumption

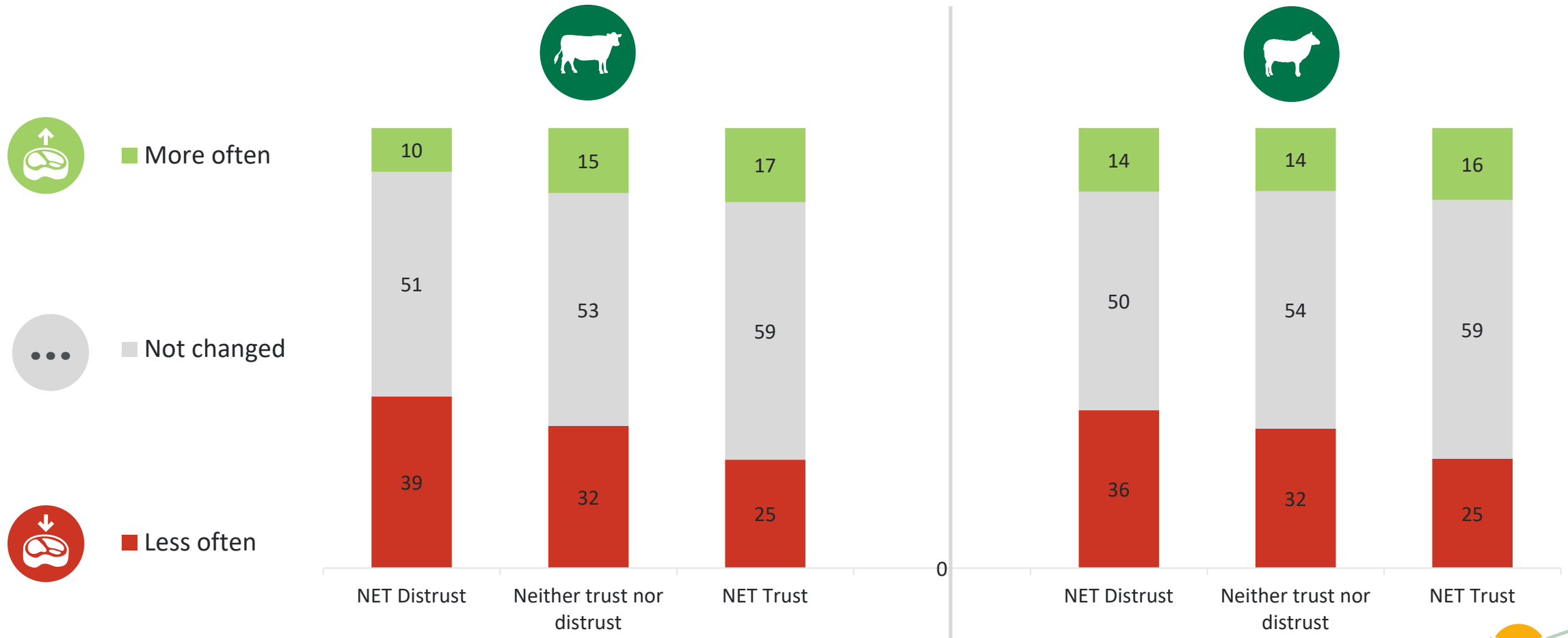
Meat bought and eaten regularly at home by Level of trust in industry (%)





# Red meat reduction is also correlated with lower trust in the industry

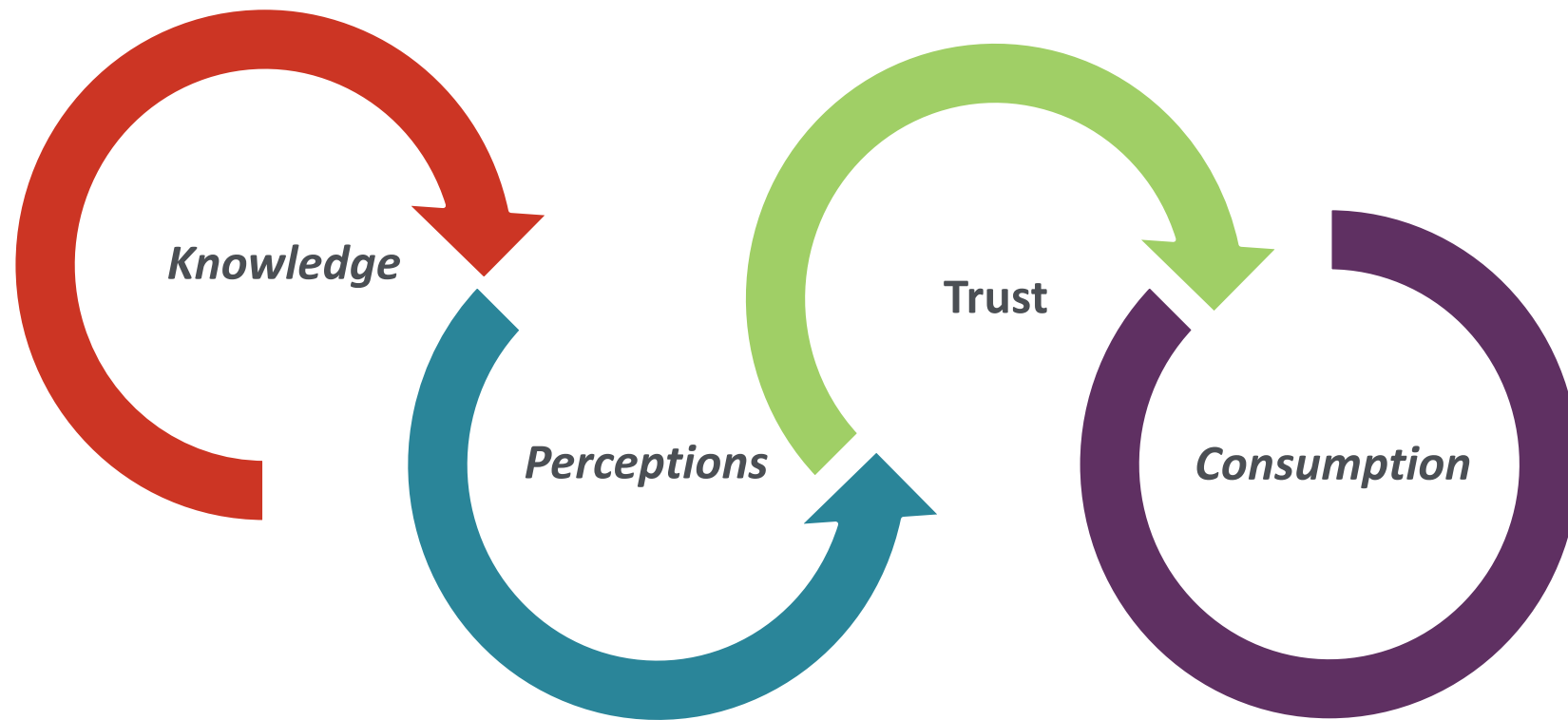
Relative red meat consumption compared to 1 year ago by Level of trust in industry(%)



A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago? SLO1 How much do you trust each of the industries below to do what is right?

Base: Meat eaters B4B trust/5/T4B trust – 190-209

So we know there's a ***very strong correlation*** between level of knowledge, perceptions of the industry, trust levels and consumption patterns



# In Summary .. bringing it all together

## Cost remains a key challenge for red meat consumption

The number of red meat reducers remains stable

As expected, cost is by far the main reason for reducing red meat consumption

Amongst those who consume more red meat, top reasons revolve around health and nutrition

## Industry perceptions largely positive and improving

Overall industry perceptions are positive and have recovered from a slight dip last year

Aussies value sustainability and commitment to CN30 has positive impact to perceptions.

Further spreading awareness of red meat industry's environmental initiatives could help the community better understand what this means

## Knowledge and Trust have an influence on perceptions towards red meat

The average Aussie doesn't know much about the industry but is open to learning more

Trust in the industry has increased and most trust cattle and sheep farmers

Important to continue to communicate with community on environmental action, ethical practices and community alignment to continue to grow industry trust

**For more information** (*links to websites*)

[Australian Good Meat](#) + [Red Meat Green Facts](#)

[Australian Beef Sustainability Framework](#)

[Sheep Sustainability Framework](#)

[MLA Sustainability Hub](#) + [CN30](#)

[MLA Healthy Meals](#)



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