

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

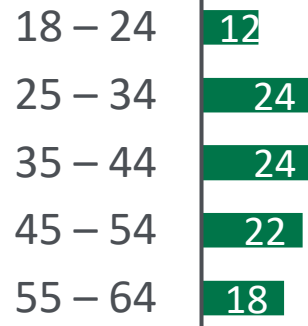
63



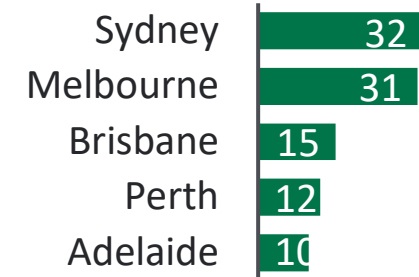
Male

37

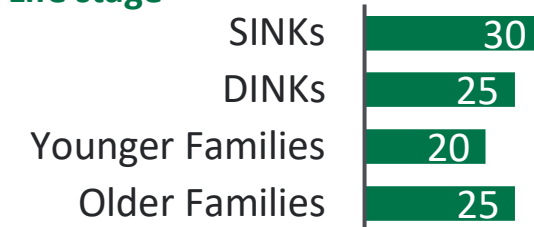
Age



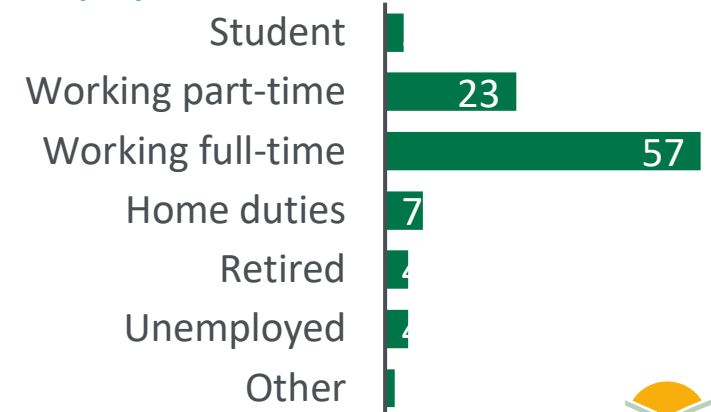
Location



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.





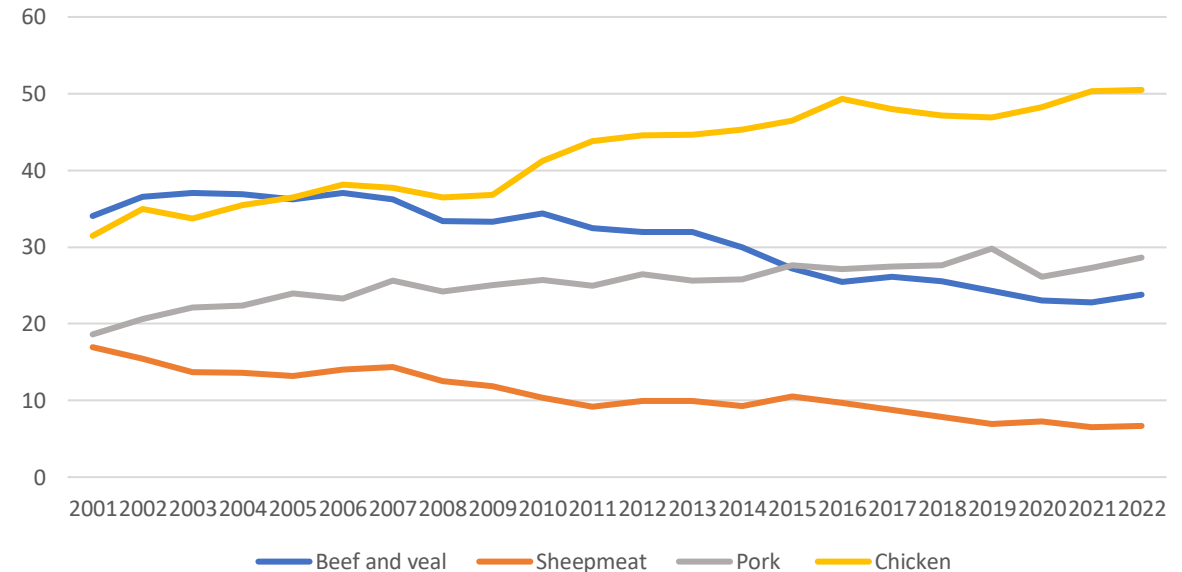
Consumption

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

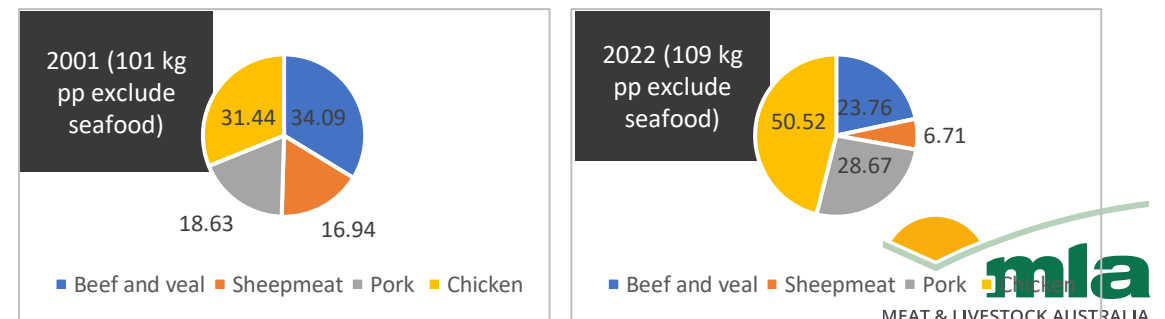
Over 20 years...

- 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

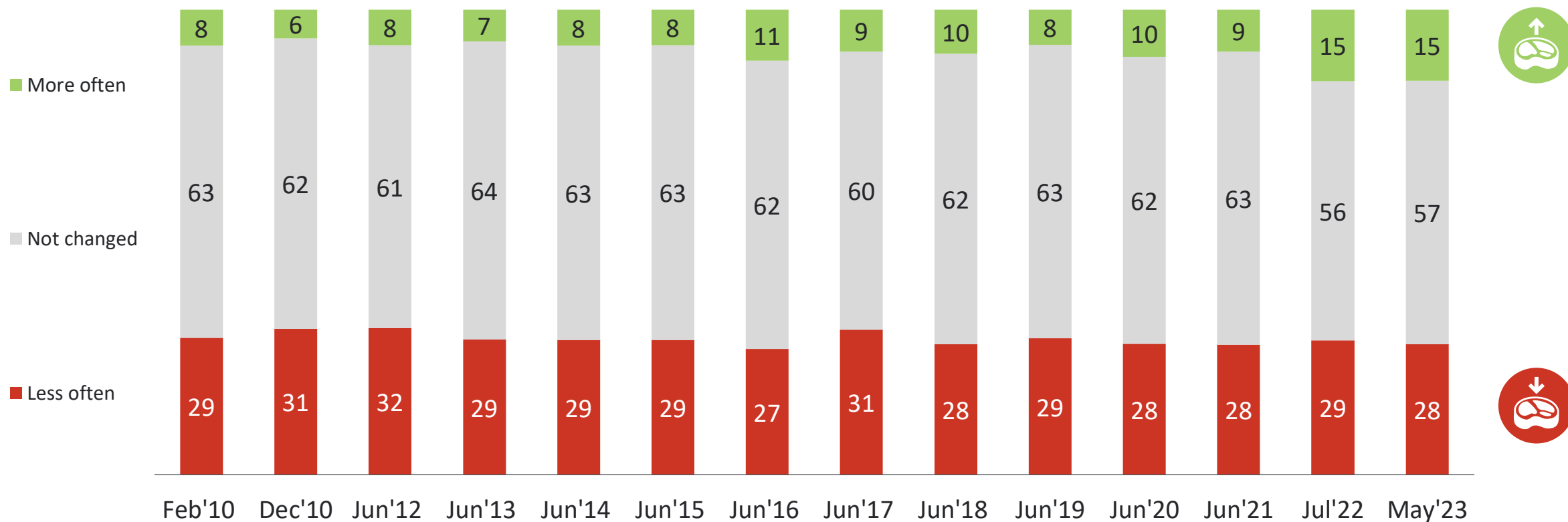


AU Per Capita Fresh Meat Consumption CY 2001 vs. 2022



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

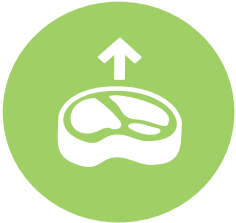
Red meat consumption vs. 1 year ago (%) – Among meat eaters



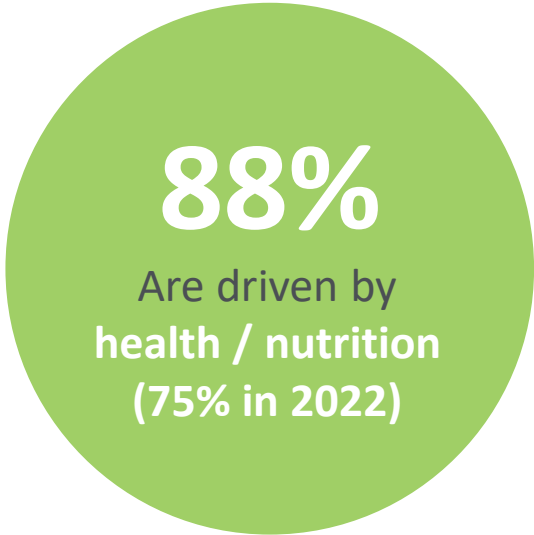
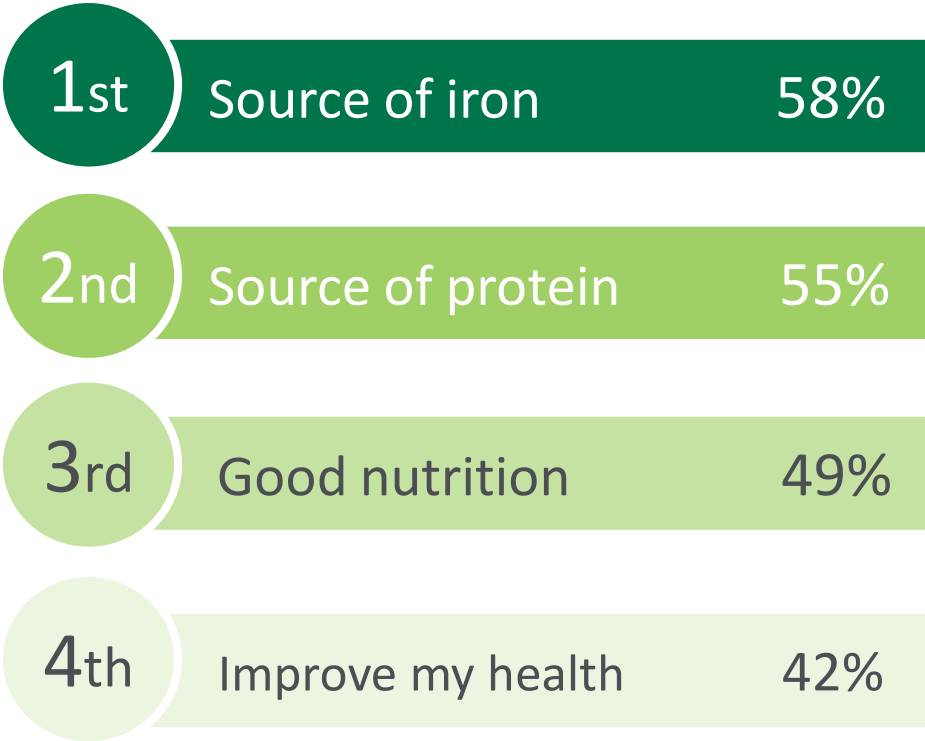
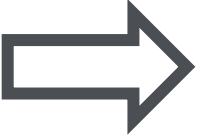
The top reasons for increasing red meat consumption revolve around health and nutrition, particularly iron and protein

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

15%



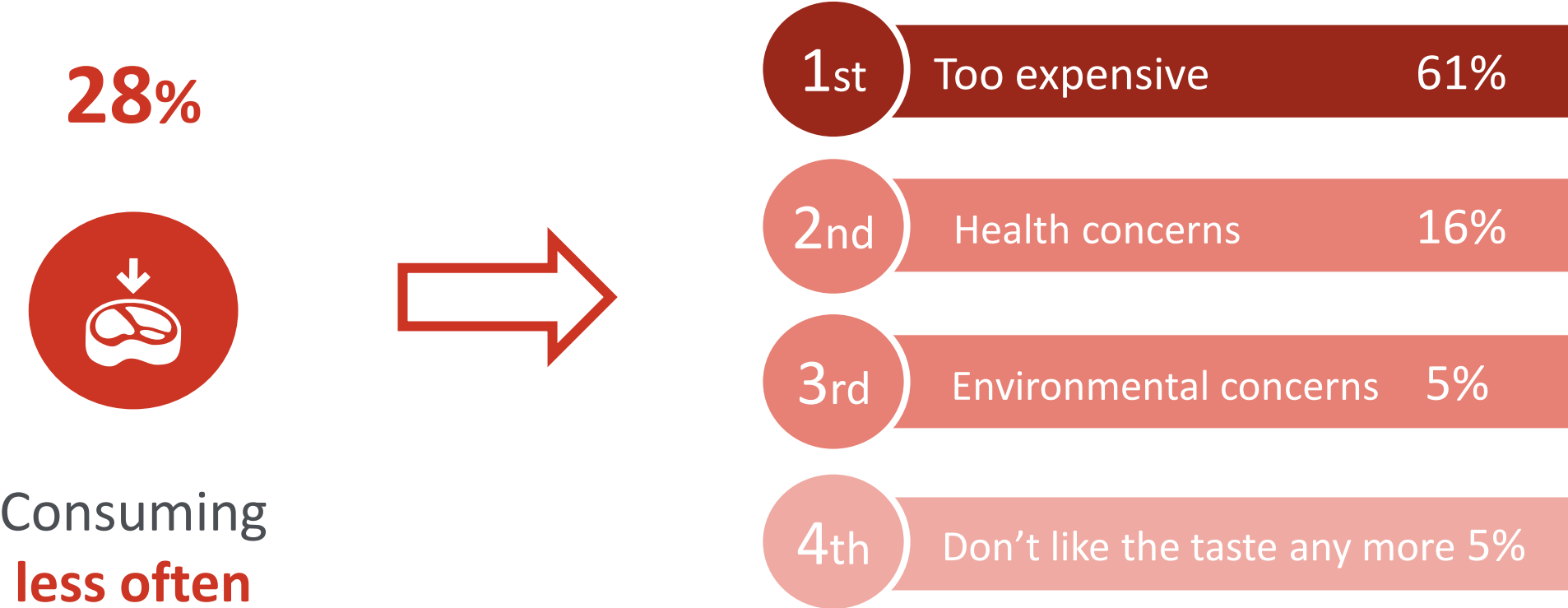
Consuming more often



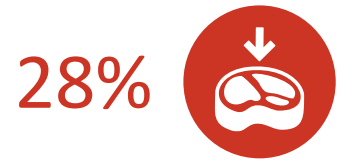
QA7A You mentioned you are eating more red meat now. Why is that? Base: Those eating more red meat (May'23 n=217)

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

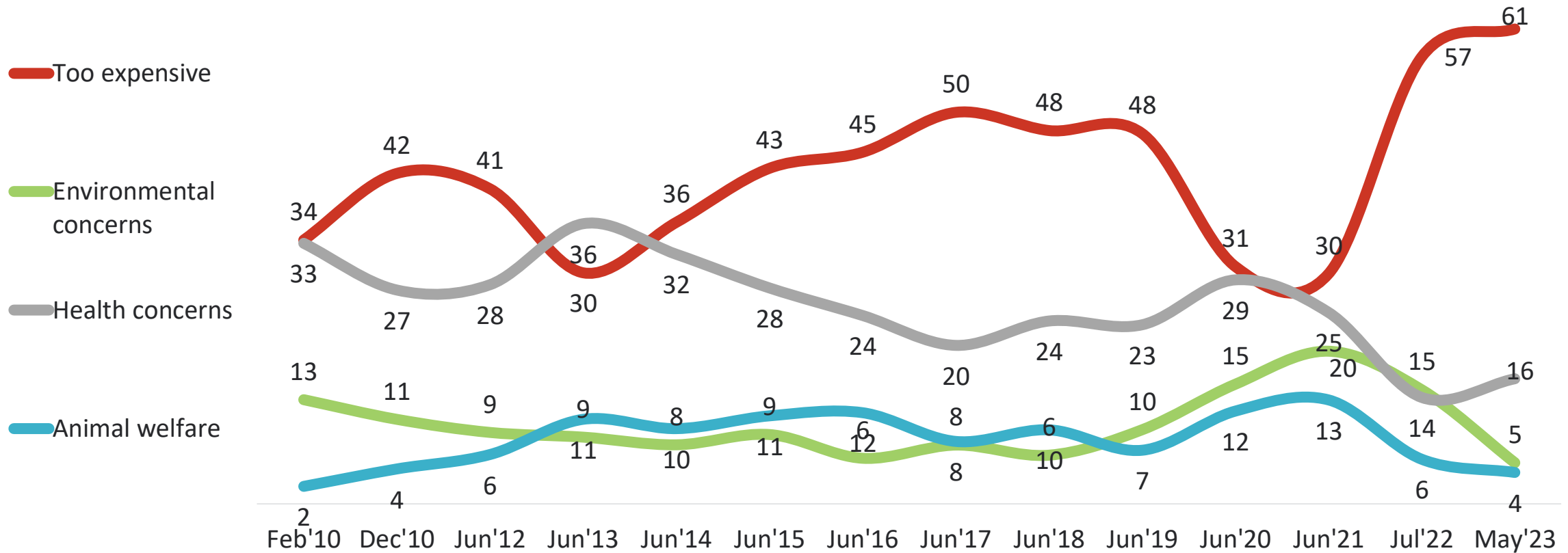
Top reason for eating less red meat (%) | Red meat reducers



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

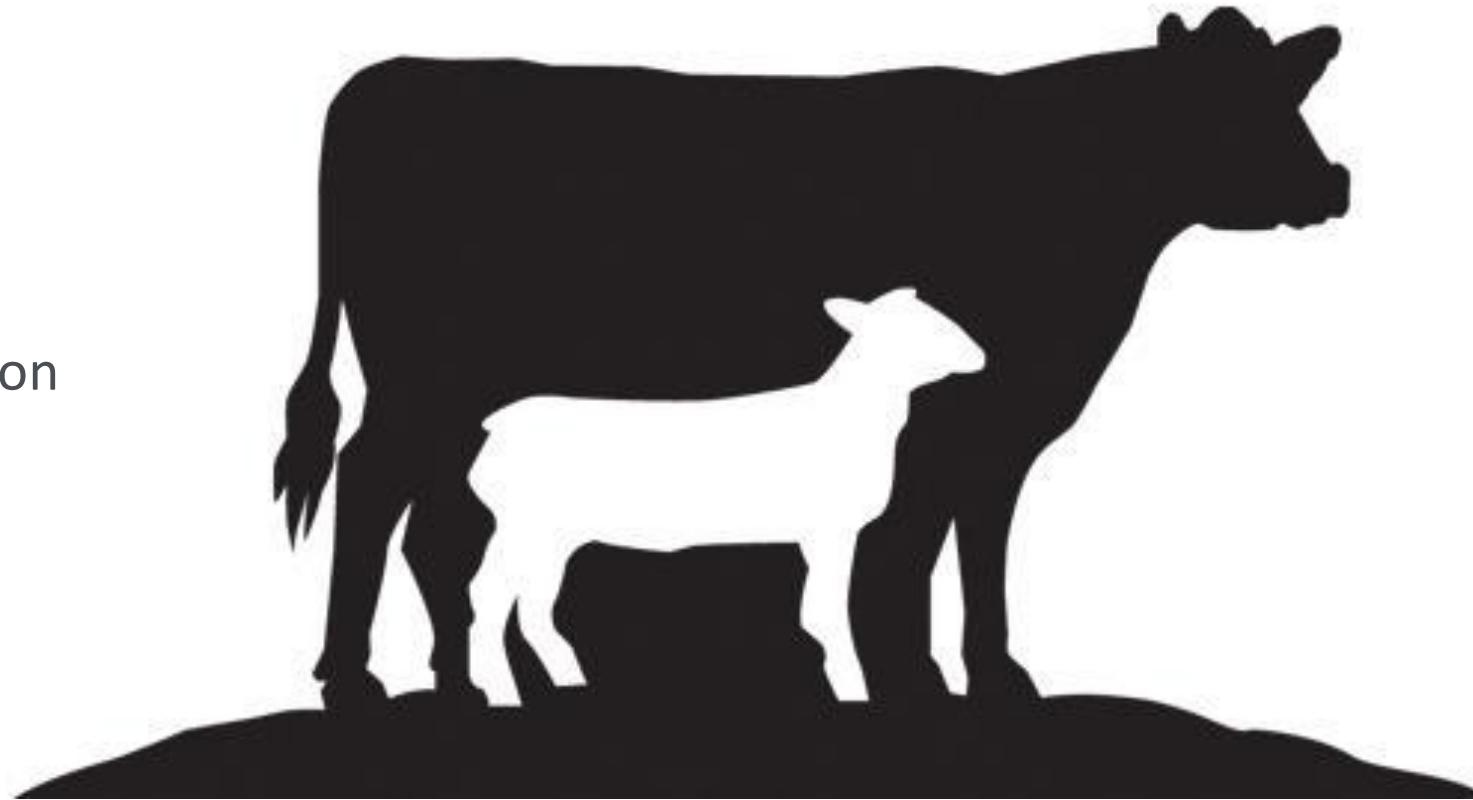
For most Australians, red meat *production* isn't top of mind

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



24%

beef production

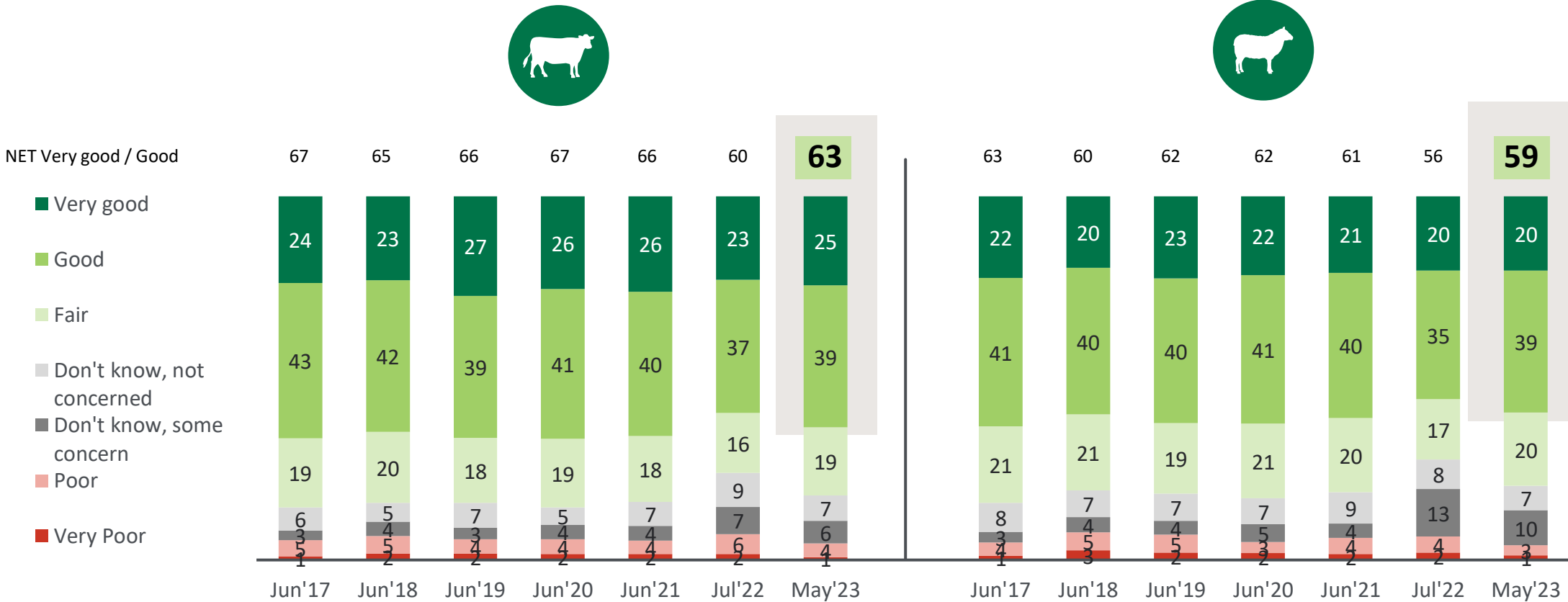


18%

lamb production

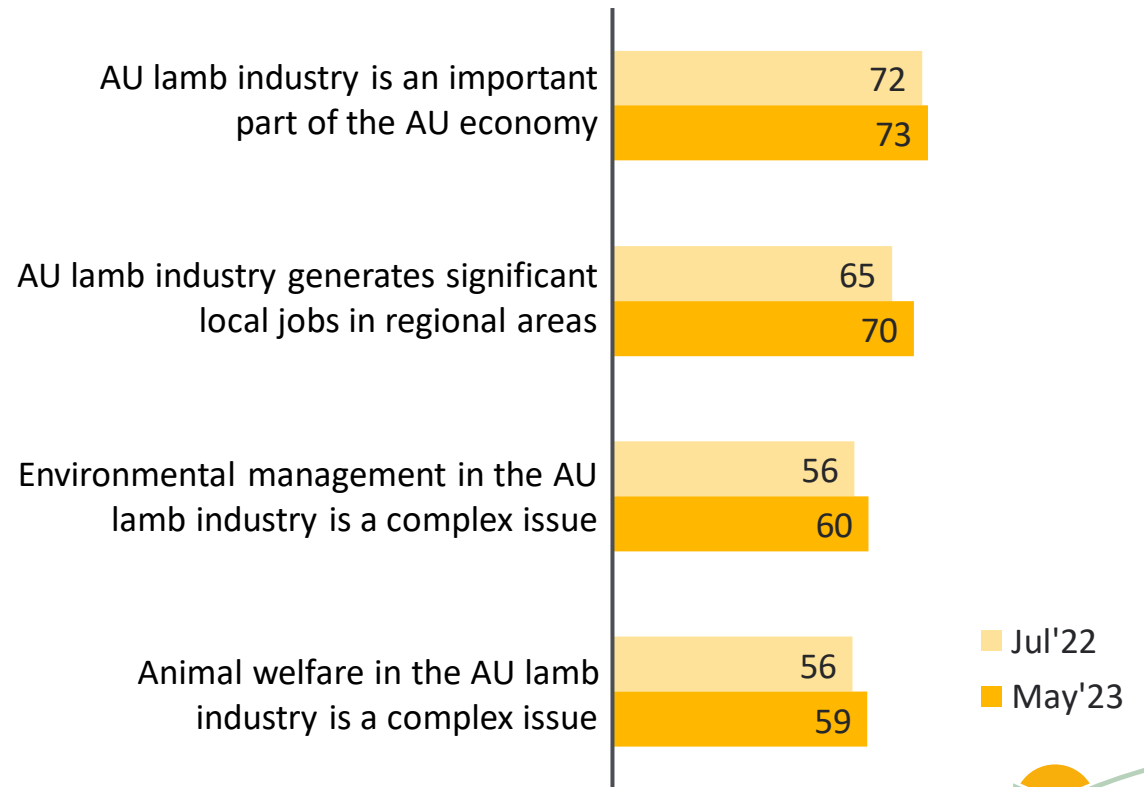
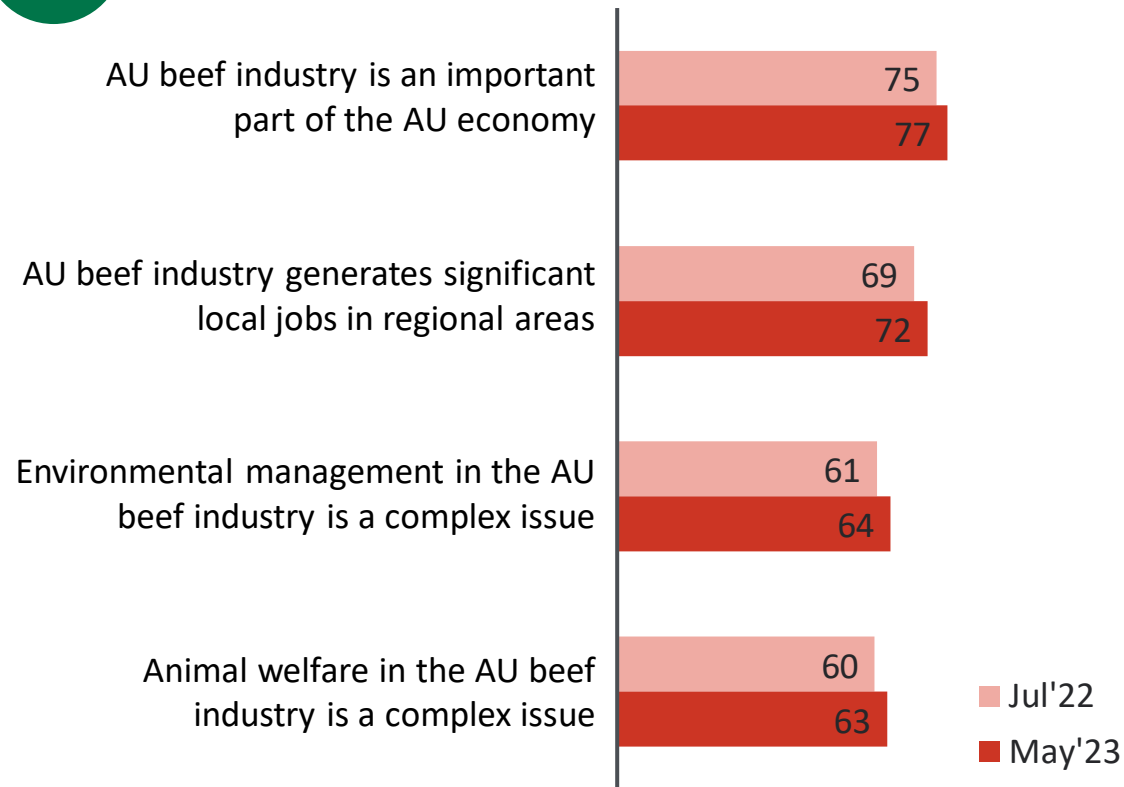
Overall perceptions of the red meat industry are mostly positive: *an increase compared to last year; few have negative perceptions*

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

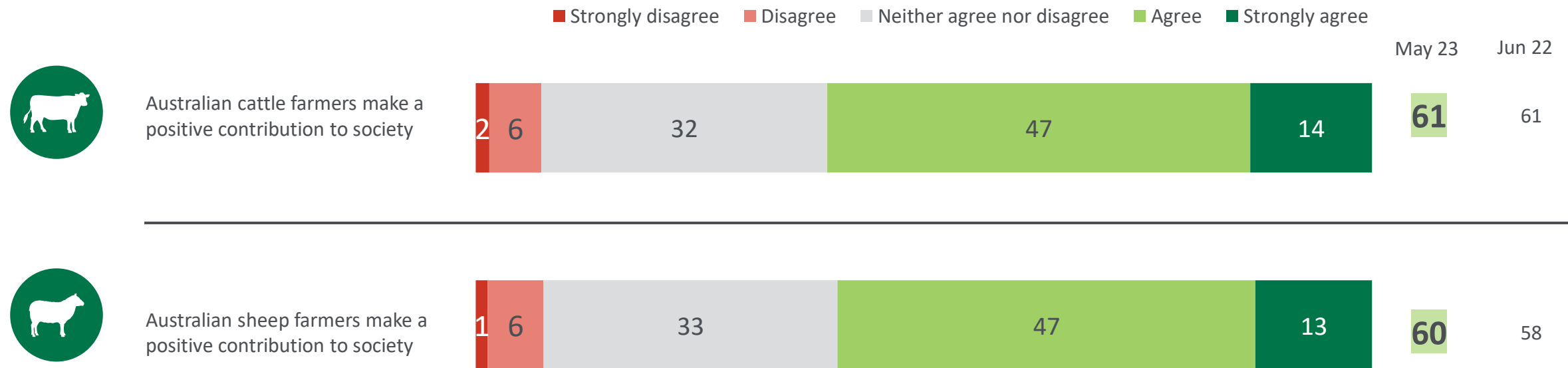


Jul'22
May'23



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

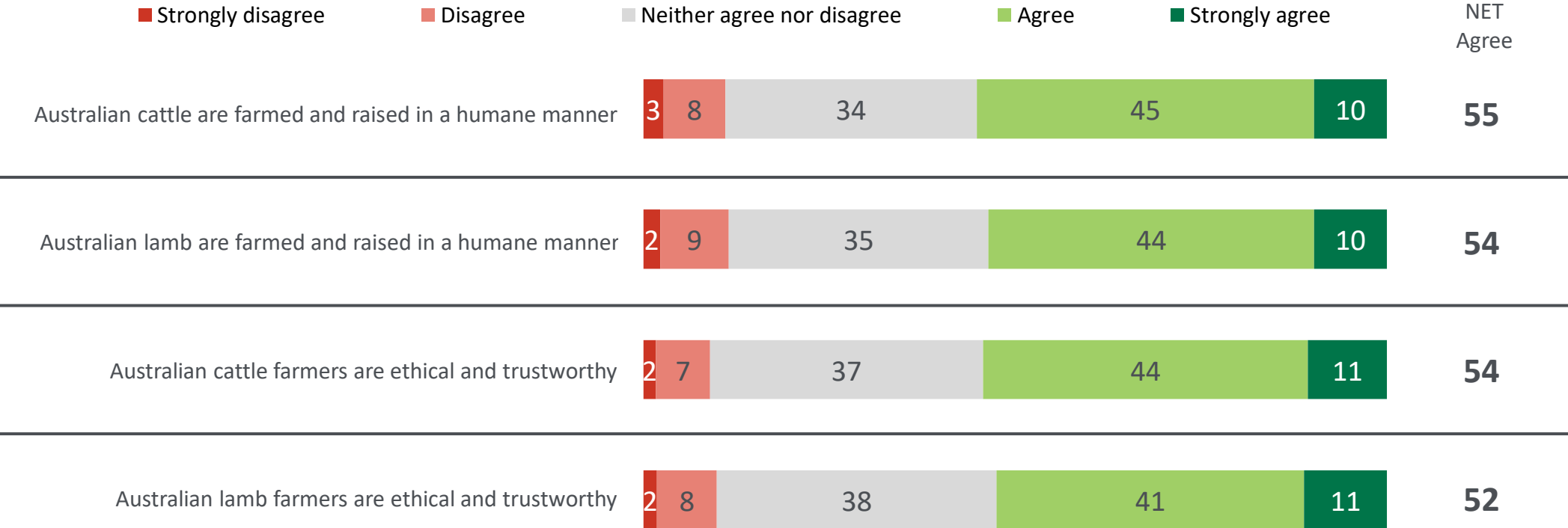
Attitudes towards beef/lamb industry (%)



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

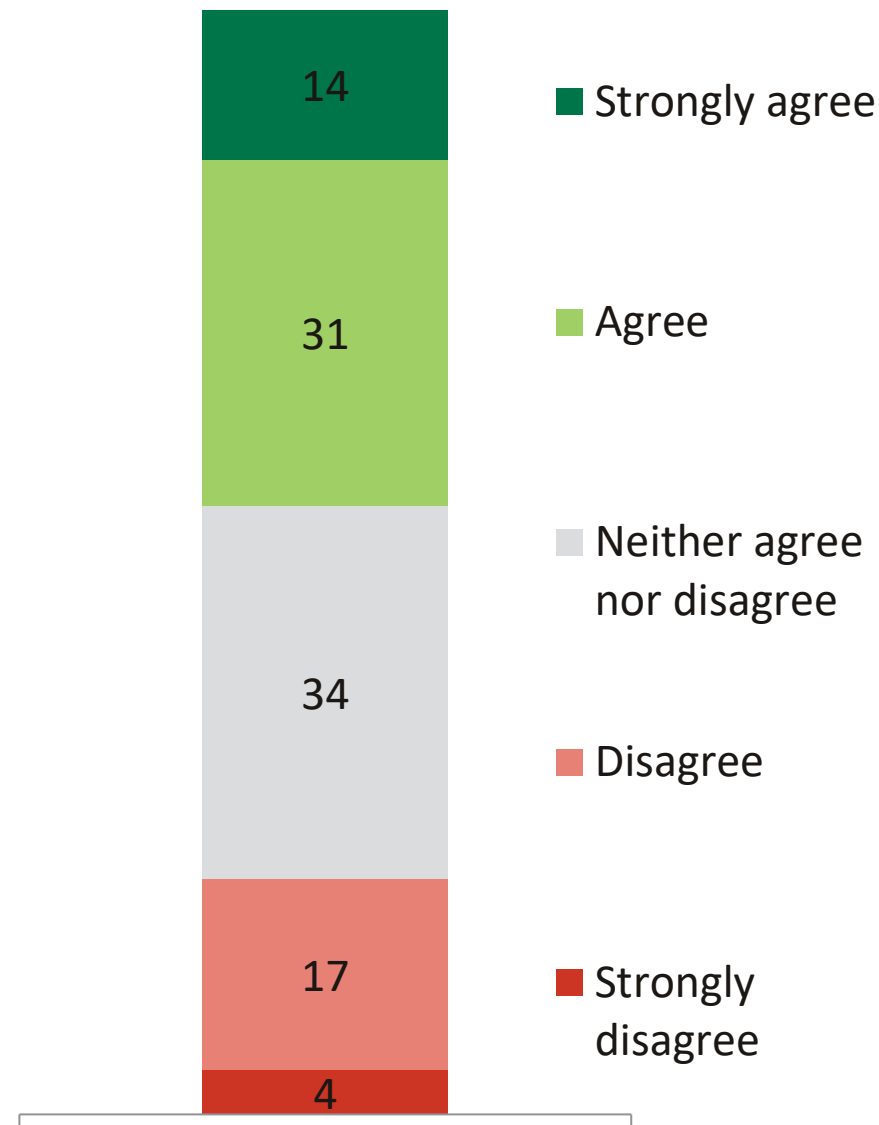
Most agree farmers are ethical and raise animals humanely

Attitudes towards cattle/lamb farmers (%)



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

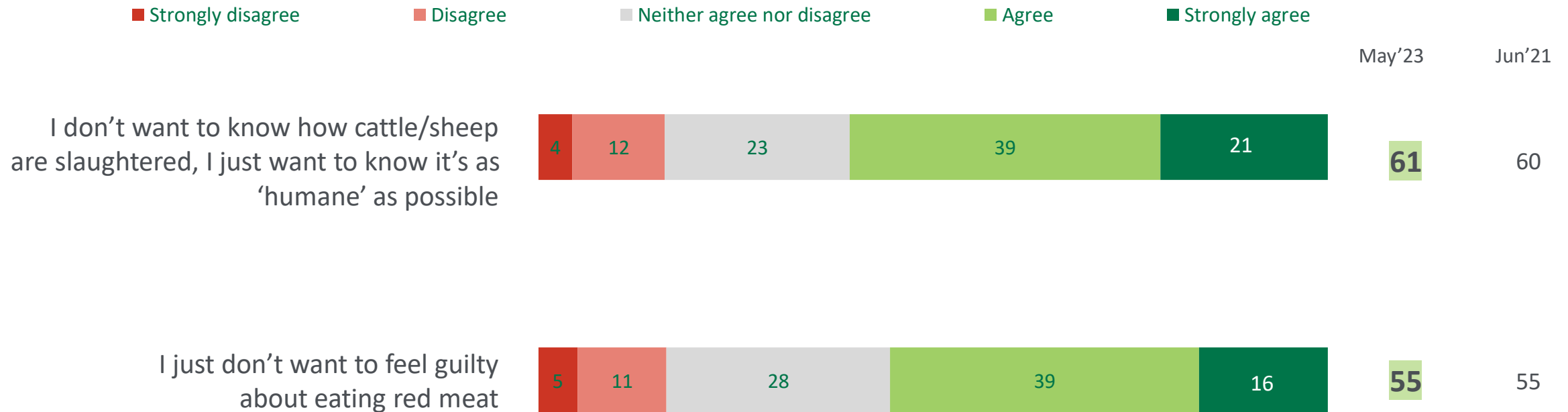
Attitudes towards red meat (%): meat eaters



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*

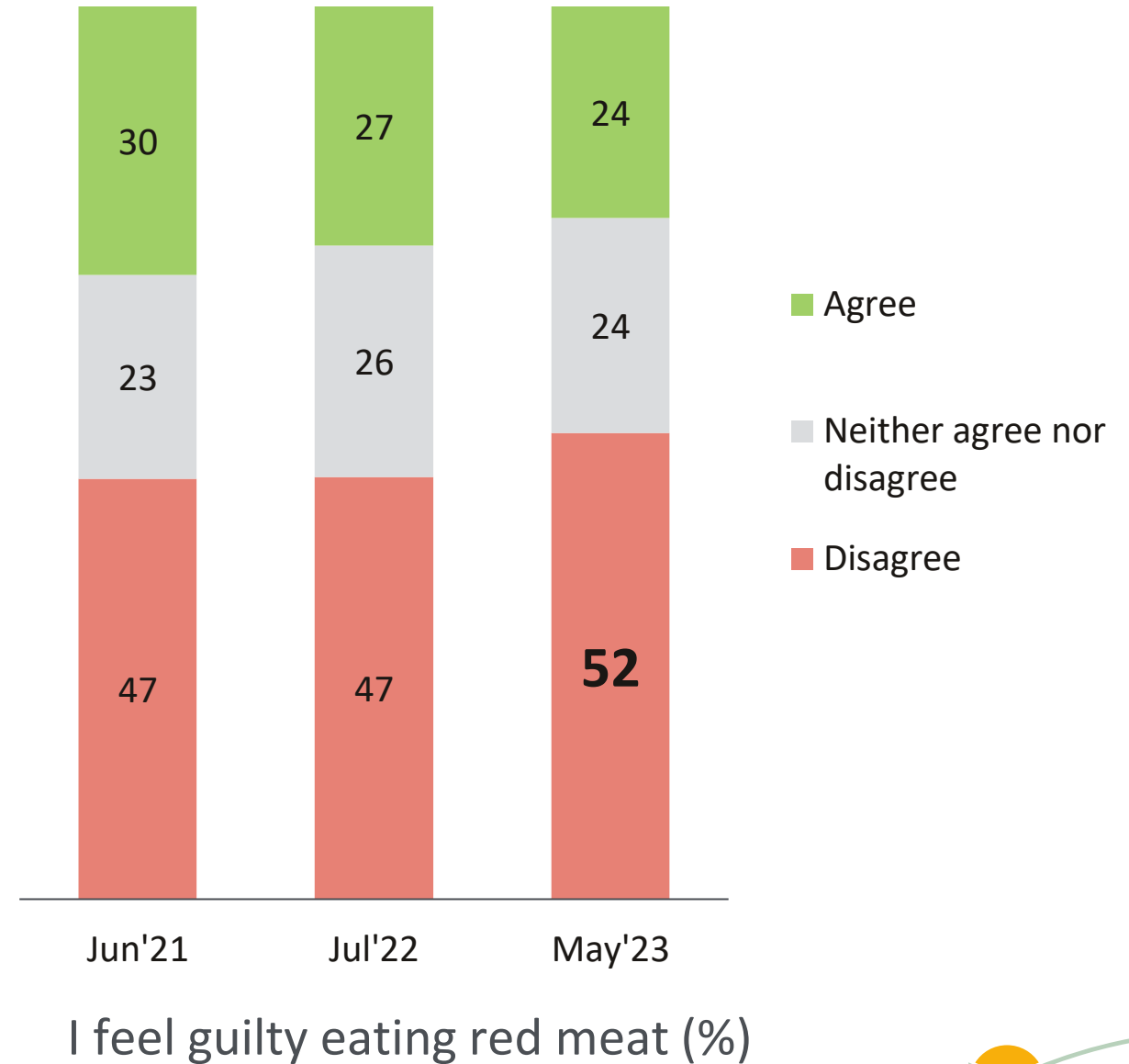
Attitudes towards cattle/lamb farmers (%)



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 (%)



Top 3 box

91

92

Extremely important

18

18

Very important

37

36

Somewhat important

36

38

Not very important

6

6

Not important at all

3

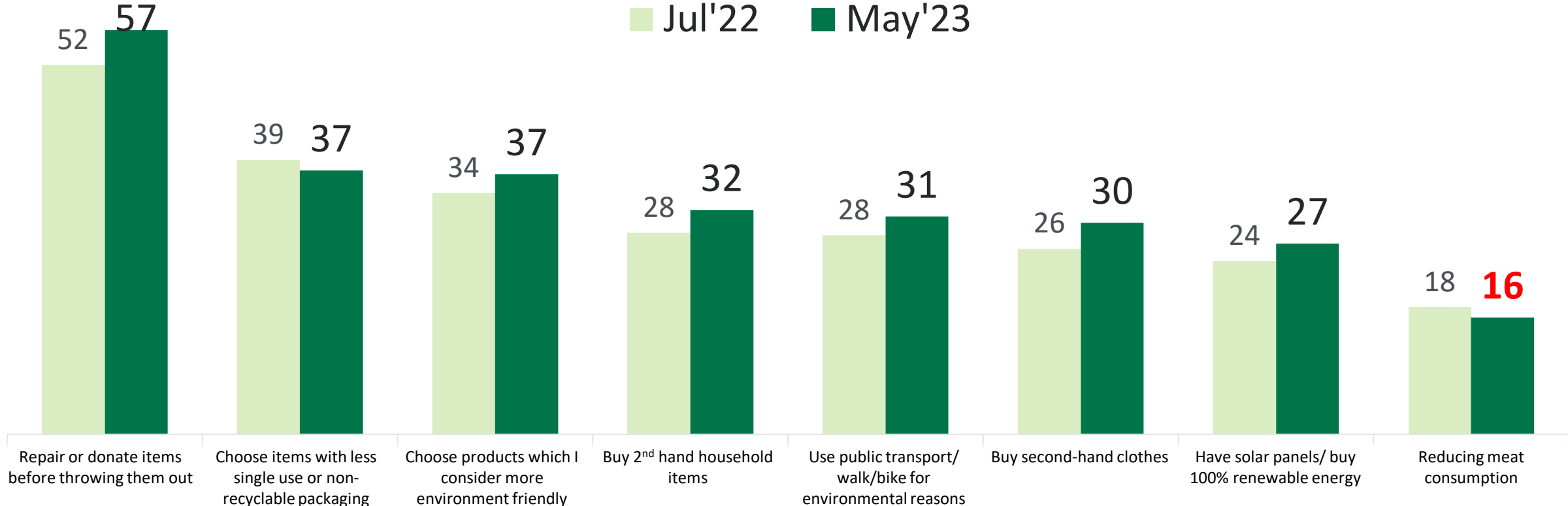
2

Jul'22

May'23

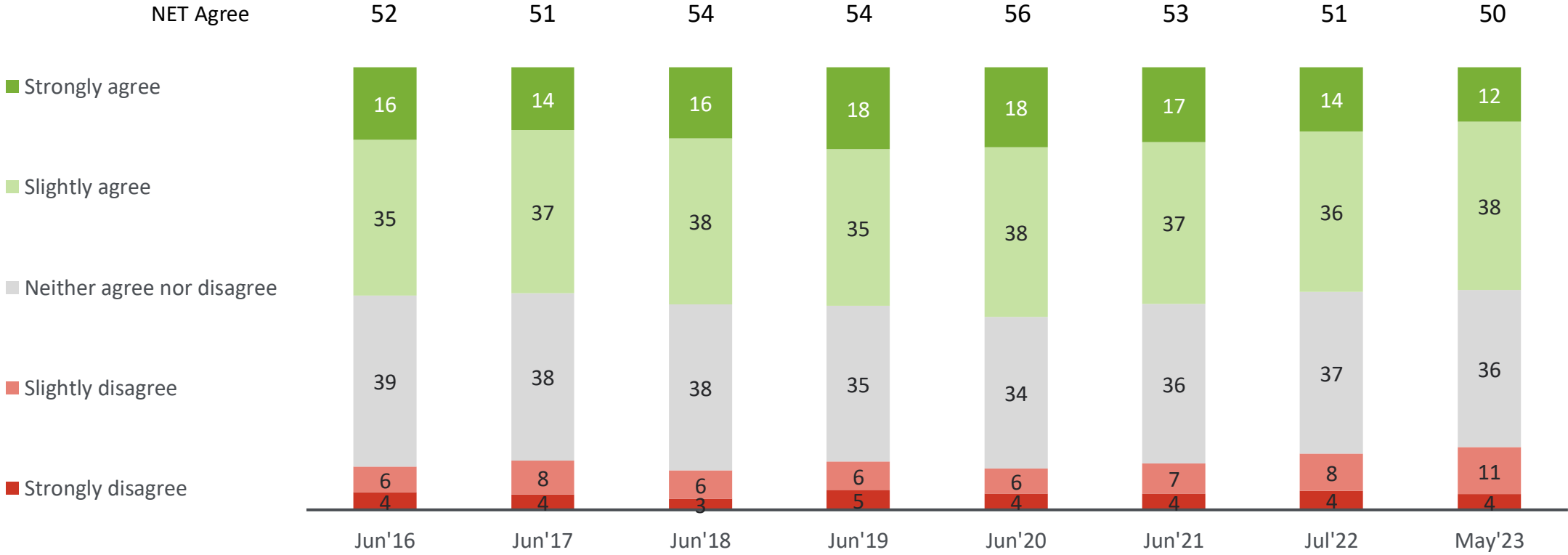
And since last year there has been a slight increase in actions to reduce environmental impact, *with fewer reducing red meat*

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



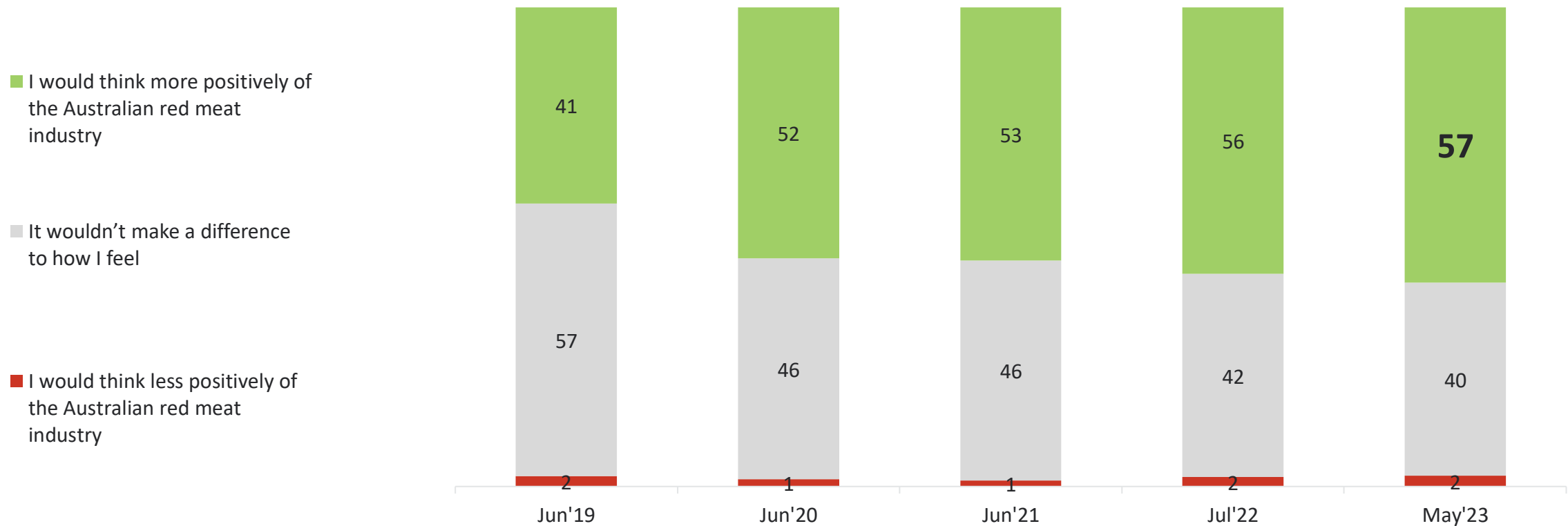
The Australian lamb industry is doing all it can to reduce its impact on the environment



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(%)

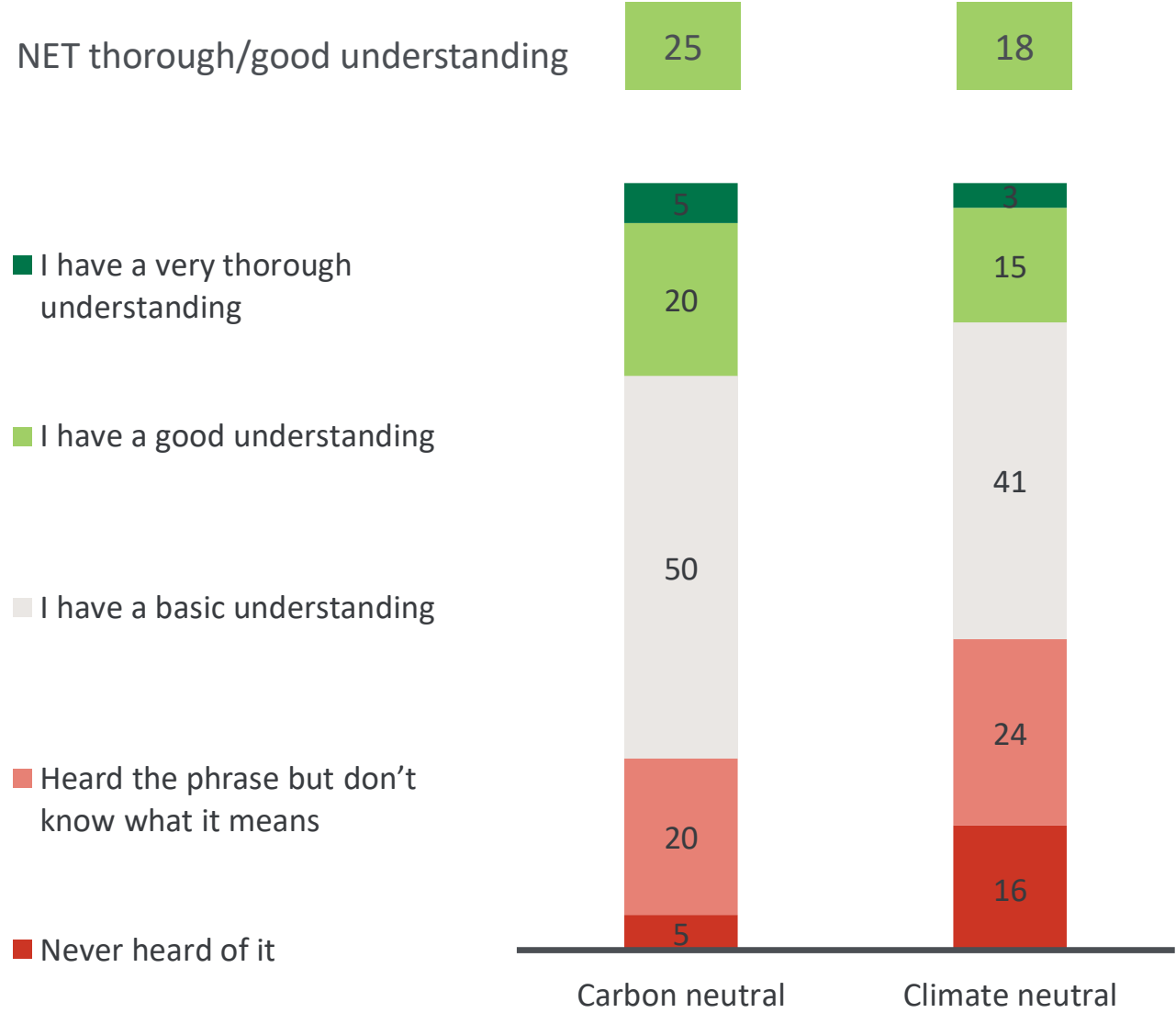


However ...

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

Even fewer understand what 'climate neutral' means

Level of understanding (%)



B1b. What is your level of understanding of the following phrases? Base: Total Sample n=1503



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

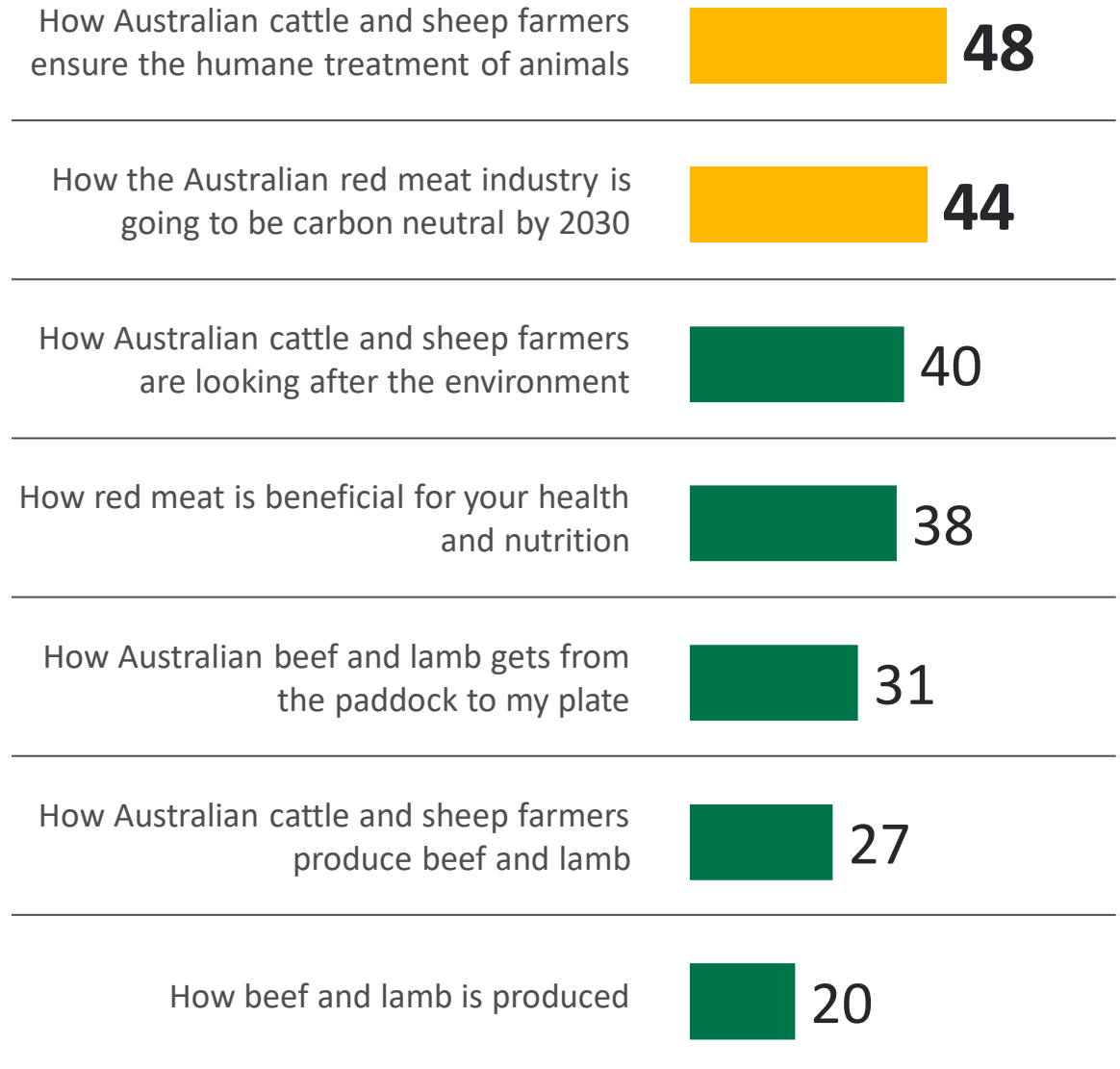


71%

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)

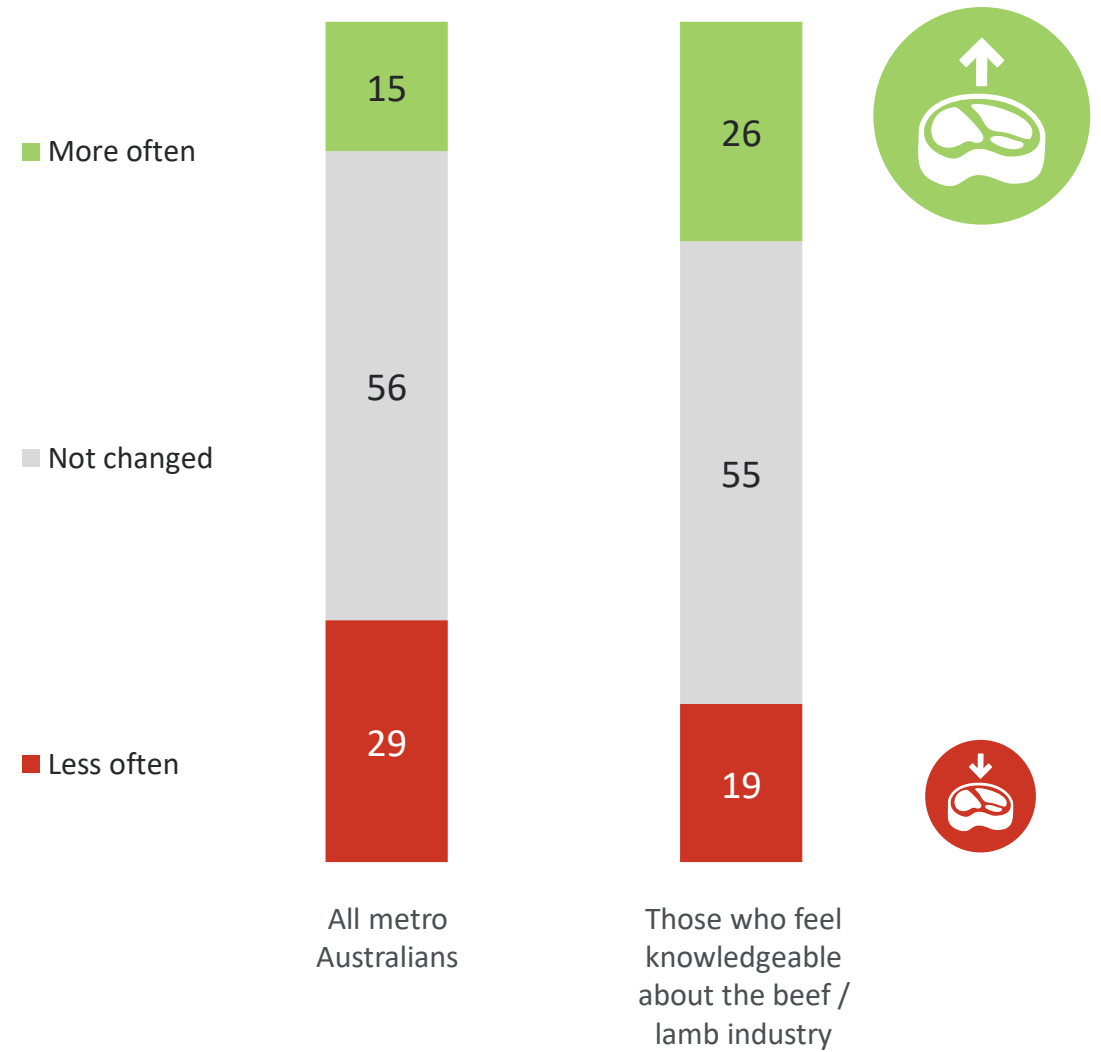
	Total metro Australians	Those feeling knowledgeable about the industry	GAP (positive increase)
 I feel good about the production of beef in Australia	61	76	+ 15
 Australian cattle producers care about the environment	50	66	+ 16
 Australian cattle are farmed and raised in a humane manner	55	72	+ 17
 Australian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

**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%



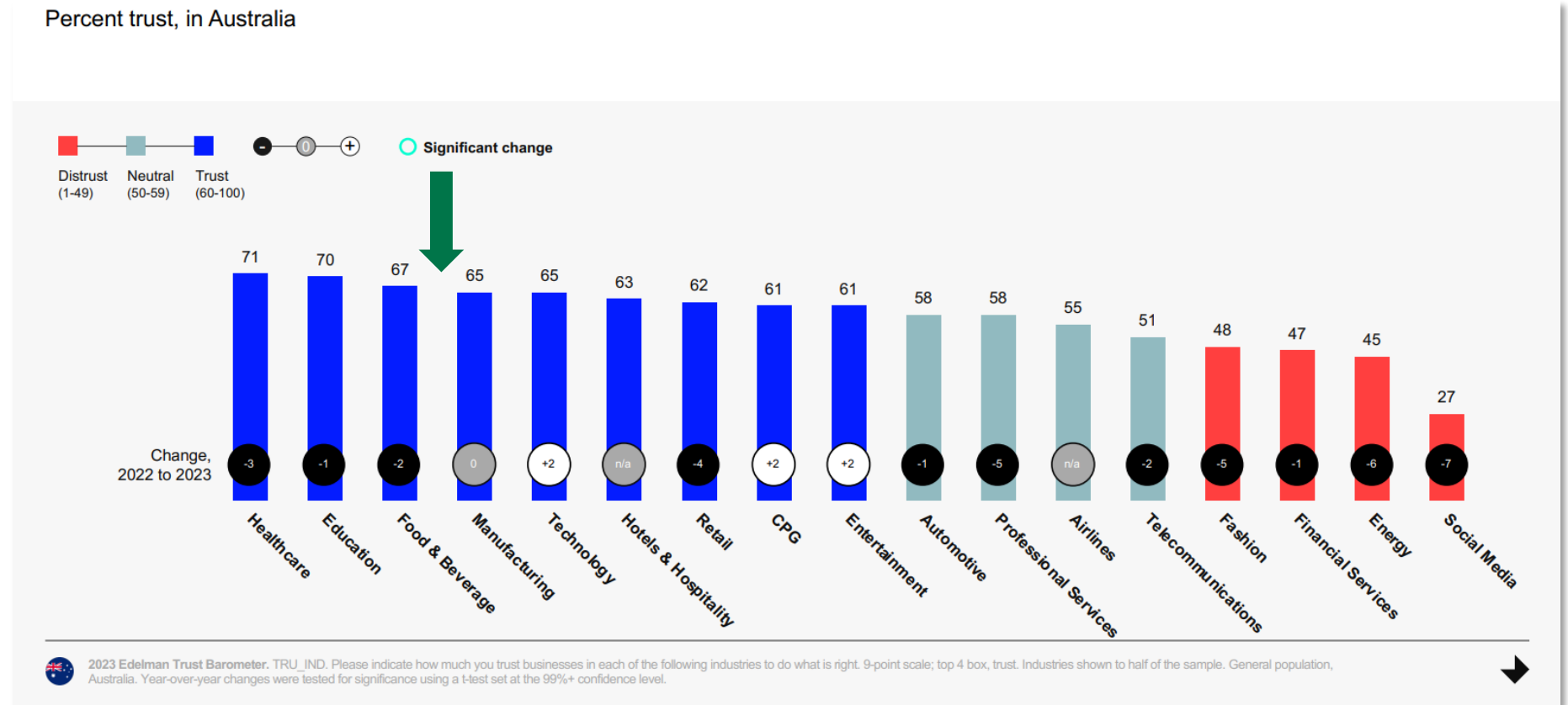
Compared to other industry sectors, the red meat industry is up near the top percentage of 'trusted' industries, shifting up vs. last year

66% +5% vs. 2022

Australian beef industry

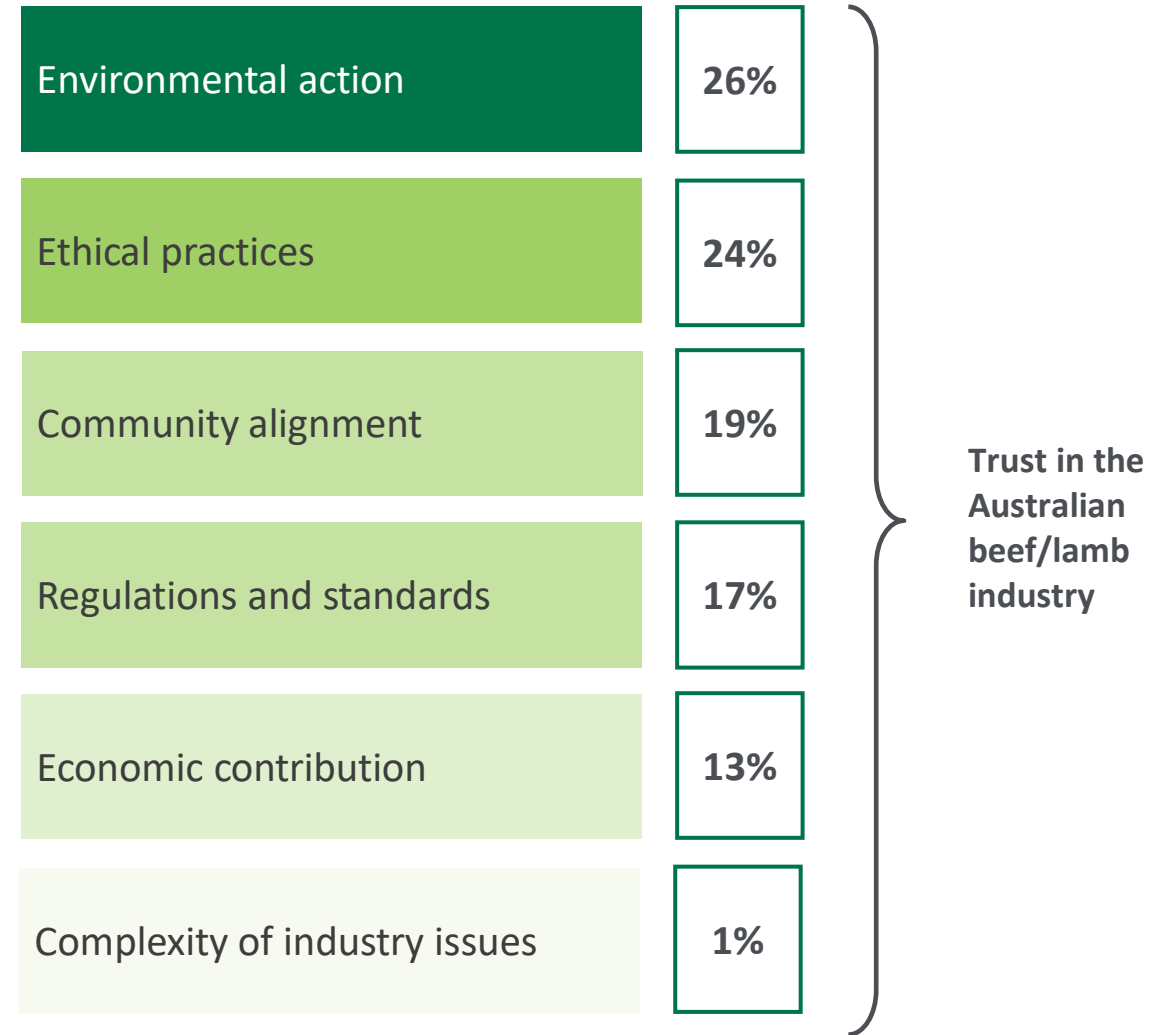
66% +6% vs. 2022

Australian lamb industry



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

Drivers of industry trust (%)



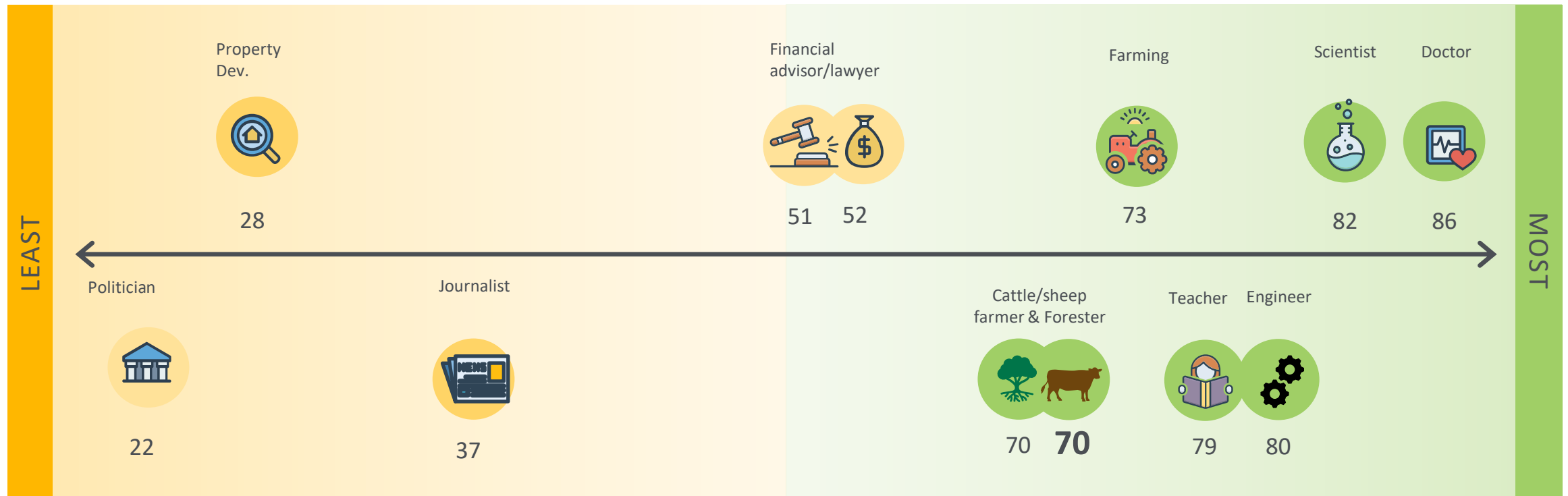
Importance scores above have been derived using multiple linear regression with trust in the Australian beef/lamb industry (SLO1) as the outcome and industry attitudes and perceptions (B1, C4, X15, X16) as the predictors. The specific technique used is **Shapley importance analysis**

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

<p>Ethical practices</p>	<p>Australian cattle/sheep are farmed and raised in a humane manner Australian cattle/sheep farmers are ethical and trustworthy</p>
<p>Community alignment</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>Environmental action</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>Economic contribution</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>Complexity of industry issues</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>Regulations and standards</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>

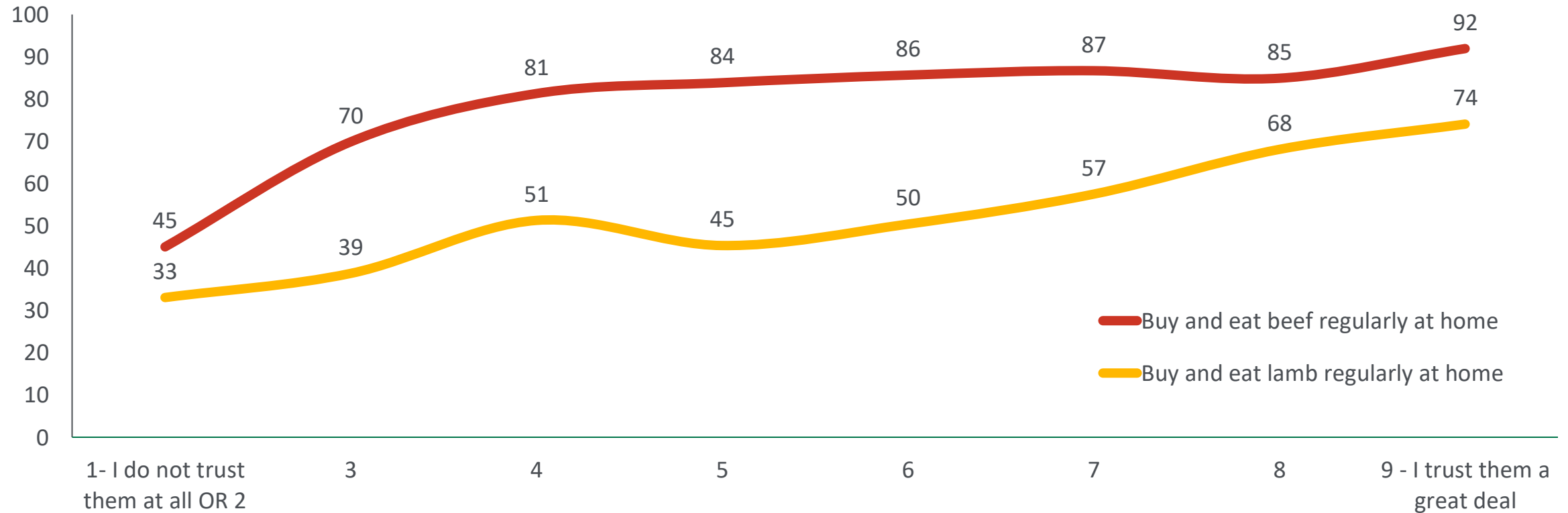
Most Aussies trust cattle and sheep farmers, similarly to adjacent professions - farmers and foresters

The spectrum of industry trust



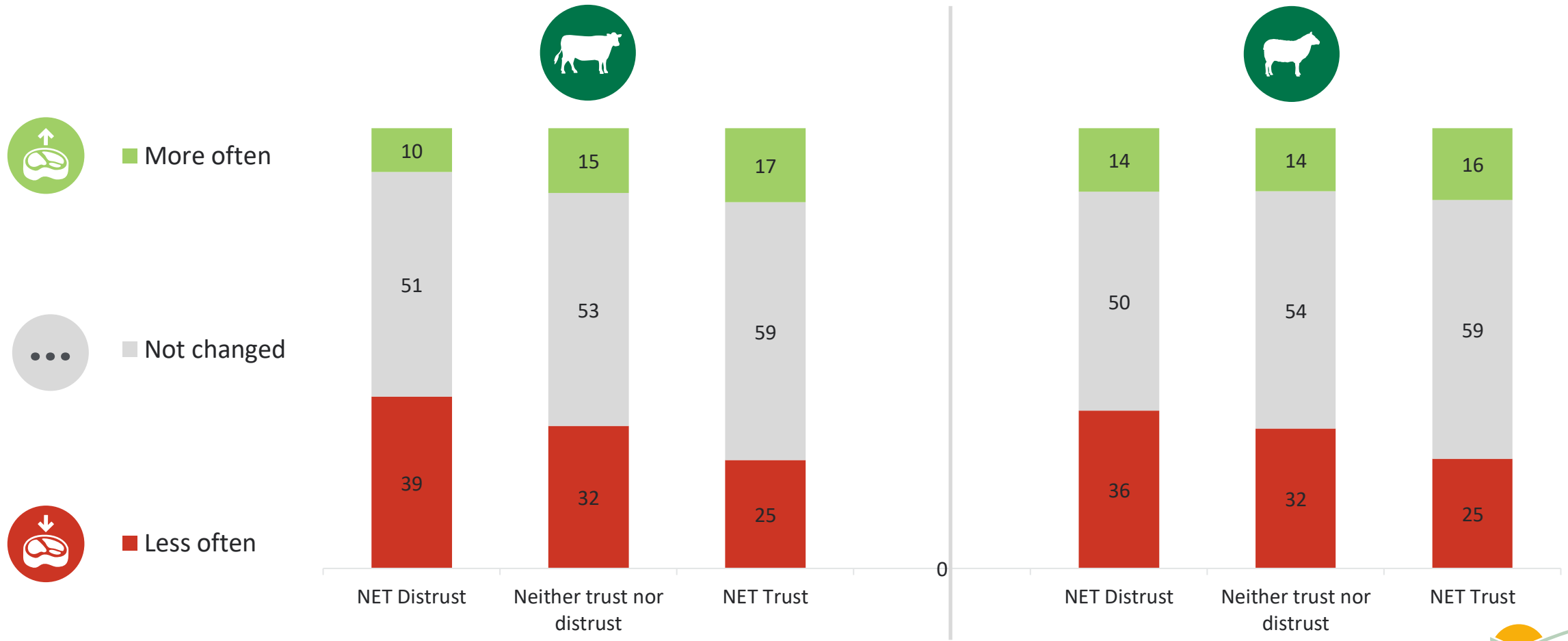
Higher trust in industry is correlated with higher consumption

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

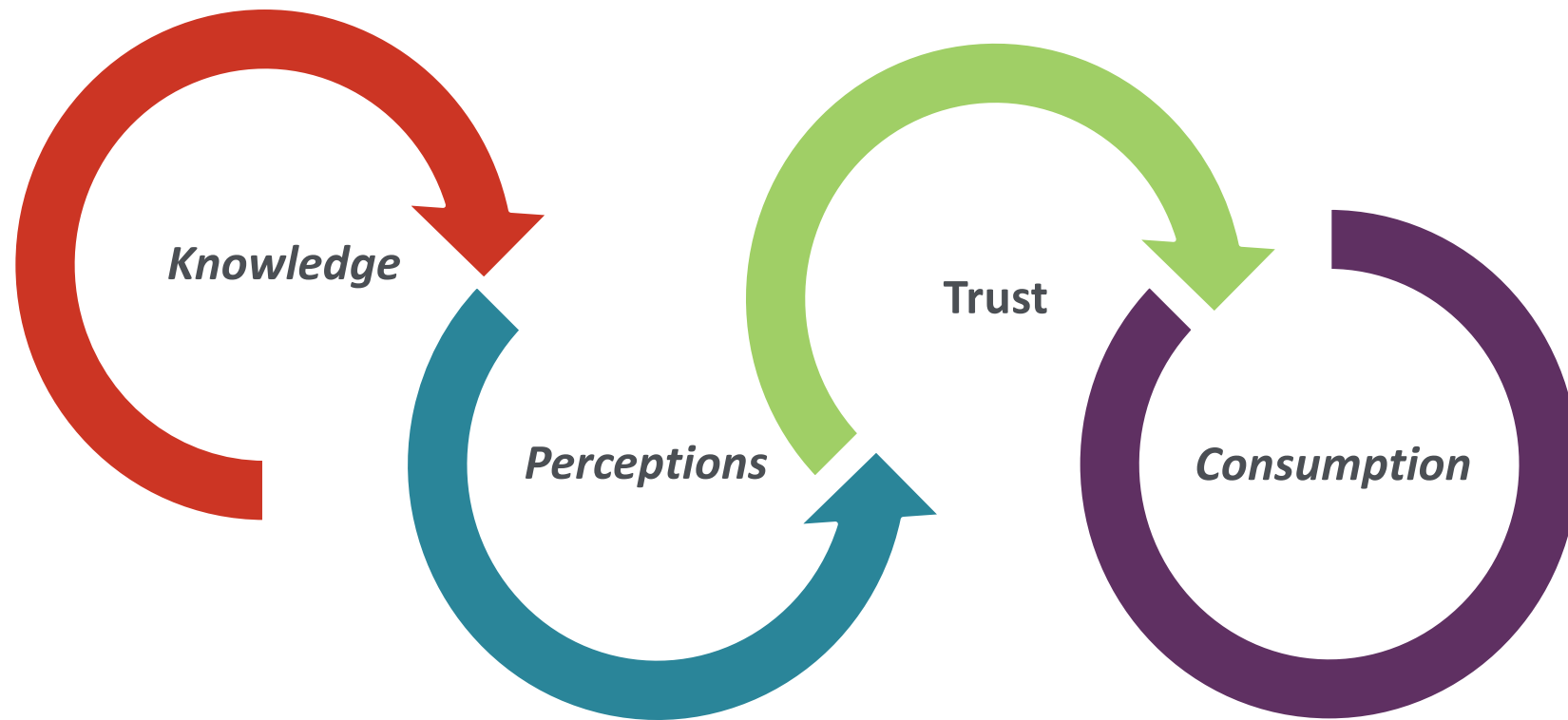
Relative red meat consumption compared to 1 year ago by Level of trust in industry(%)



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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Meat & Livestock Australia Limited | ABN 39 081 678 364 | Level 1, 40 Mount Street, North Sydney NSW 2060 Postal address: Locked Bag 991, North Sydney NSW 2059 | Ph +61 2 9463 9333 | Fax +61 2 9463 9393 | mla.com.au

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