

Community Sentiment Research 2025

Howard Parry-Husbands
Samantha Roberts



Consumer Sentiment Research method

An annual survey, first undertaken in 2010

Each year we survey roughly 1500 main grocery buyers and main meal preppers aged 18-64, across the five main capital cities

2025 captures the Wave 16 of this study

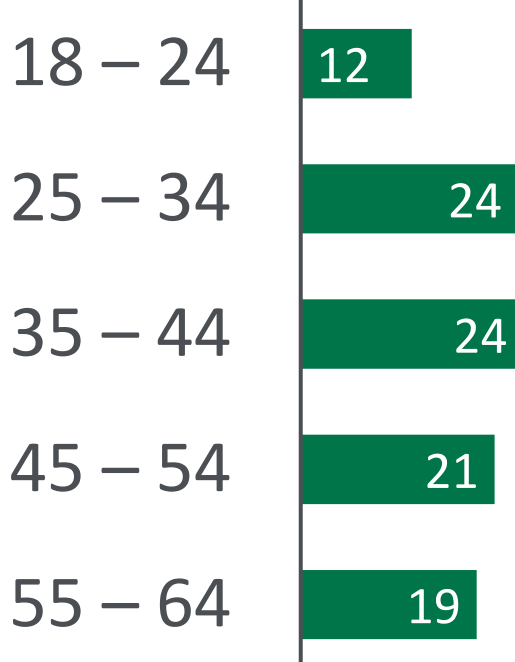
Sample profile – June 2025 N=1501

Gender

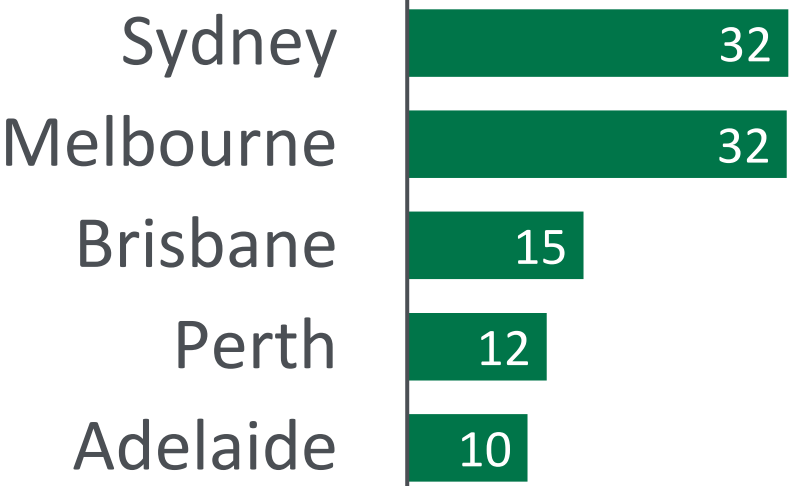


Female 62 Male 37

Age



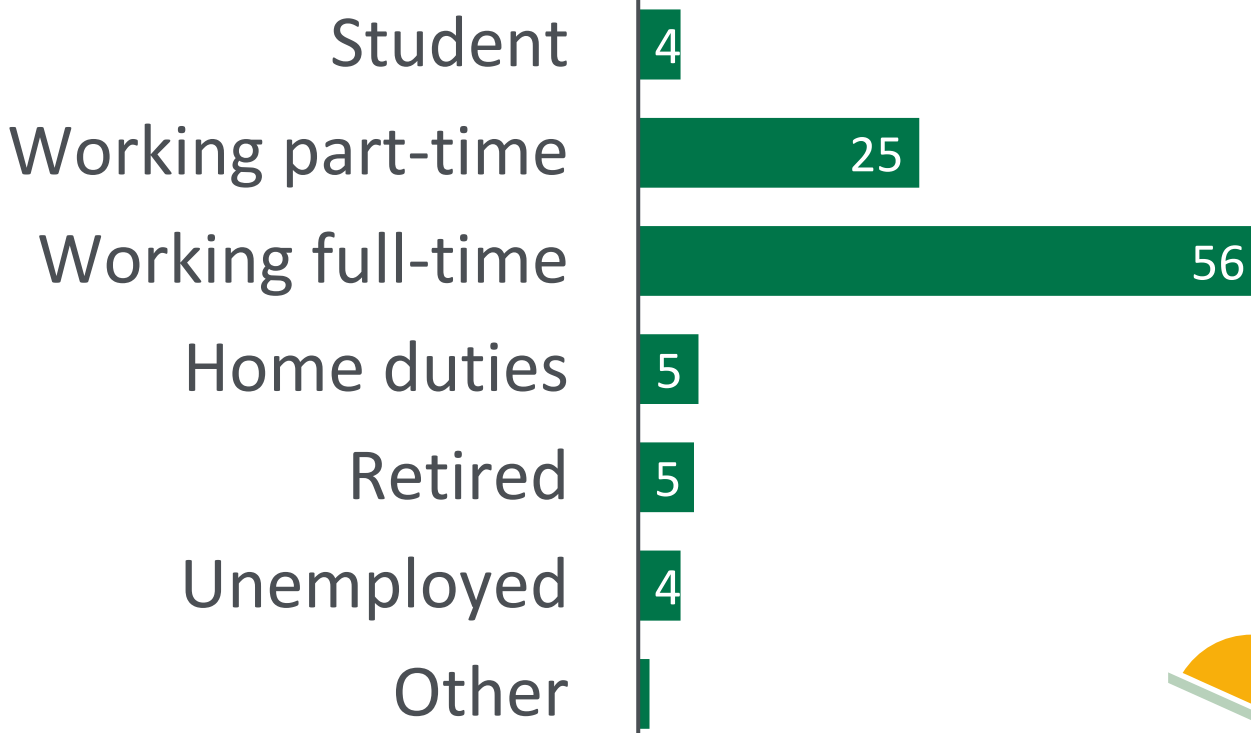
Location



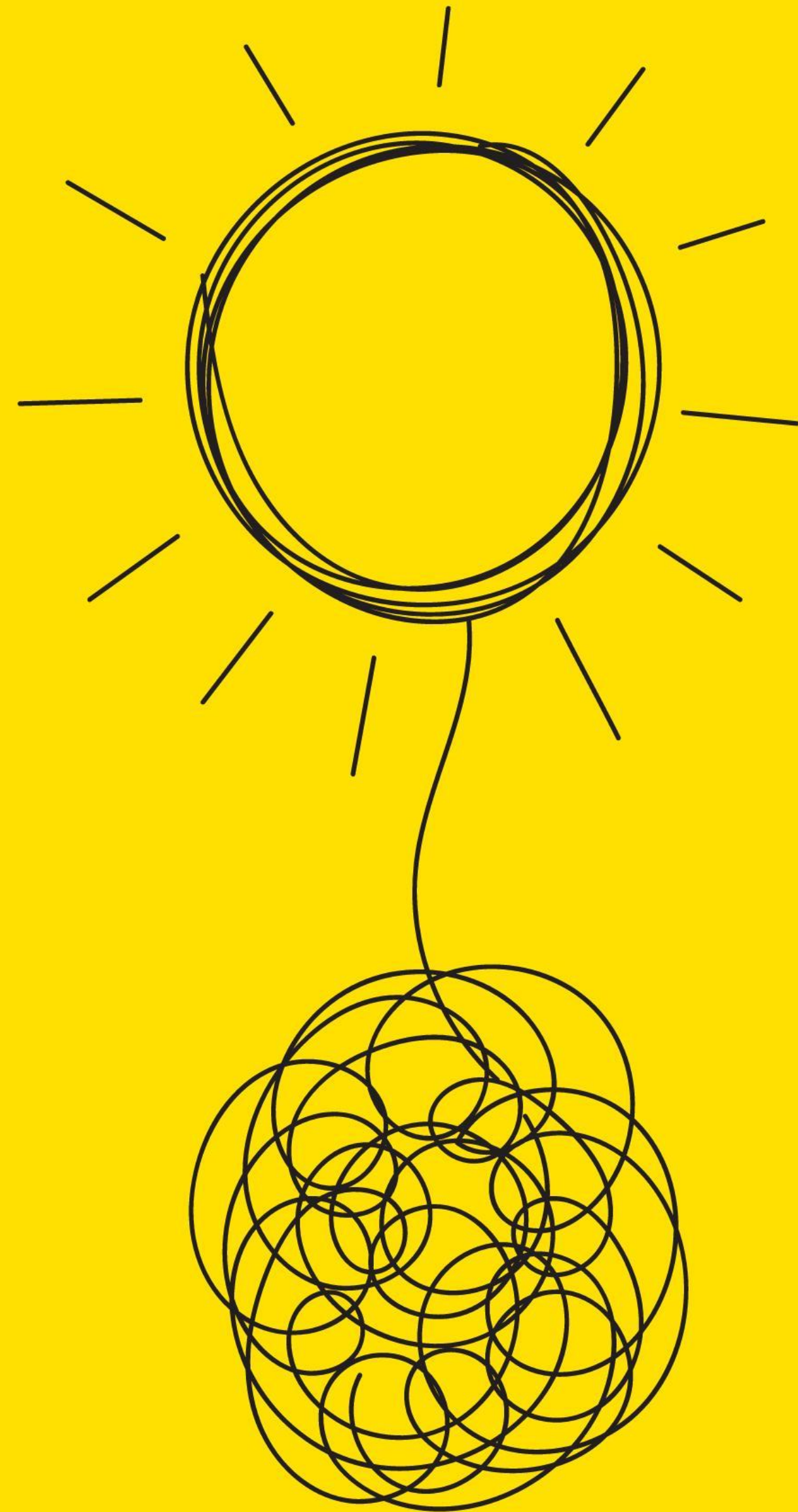
Life stage



Employment



Key 2025 insights



1. For the first time, more Australians claim to have to increased **red meat consumption** than decreased. Vegetarian rates are also at an all-time low.



2. **Trust** is at the highest level seen to date with 67% of Australian trusting industry to do the right thing. 69% trust red meat producers to provide safe, nutritious and sustainable produce.



3. **Drivers of trust** are improving. These drivers include ethics, sustainability, transparency and responsiveness.



4. **Sustainability** continues to increase in importance. Those who think sustainability is important are more likely to believe that the red meat industry is environmentally sustainable.



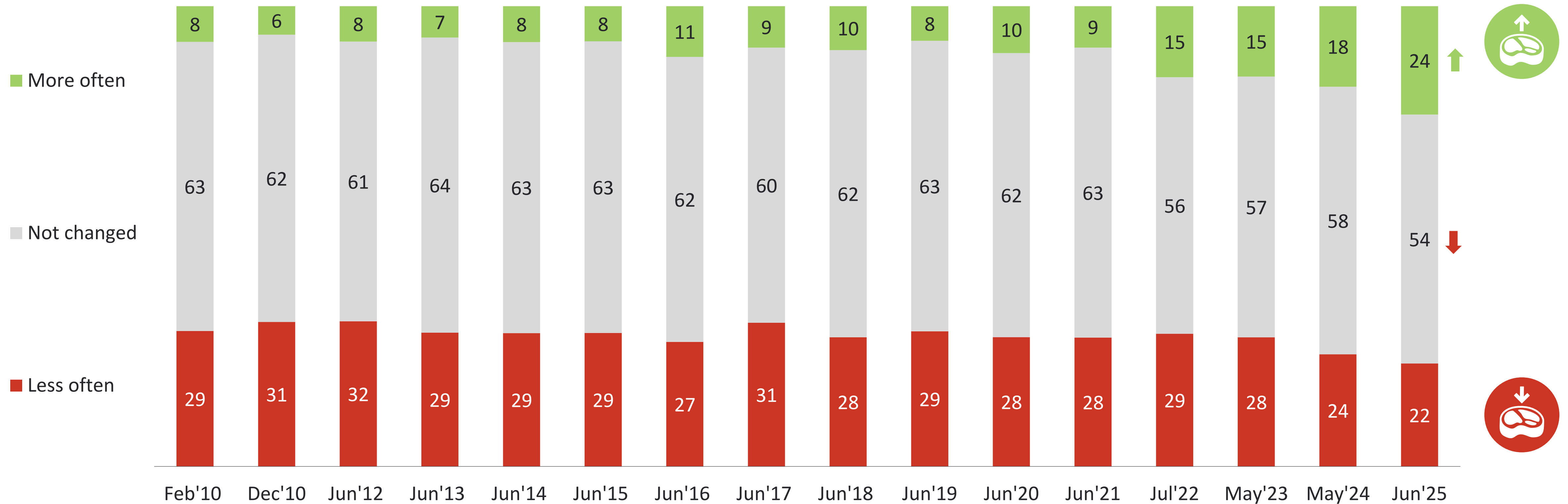
5. **Younger females** have lower perceptions towards the red meat industry across most perceptions, and hence lower levels of trust.



Consumption

The proportion of red meat increasers is up again this wave; the highest since tracking began

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



↓ Significant decrease vs. May 24 ↑ Significant increase vs May 24



A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago?

Base n=(n=602-1431)

For the first time, there are more increasers than reducers.

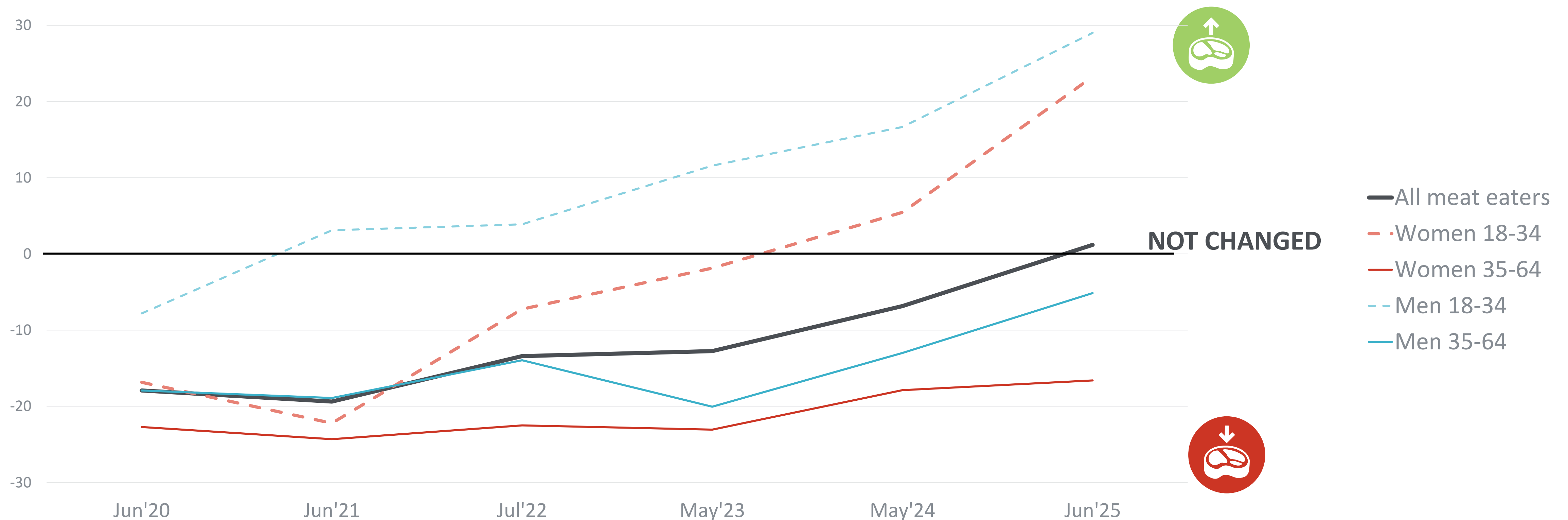
This trend is driven by younger demographics

Women are less likely to be increasing than men



Consumption

NET Red meat consumption vs. 1 year ago (% more minus % less) – Among meat eaters



NOT CHANGED

- All meat eaters
- - Women 18-34
- Women 35-64
- - Men 18-34
- Men 35-64

A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago?

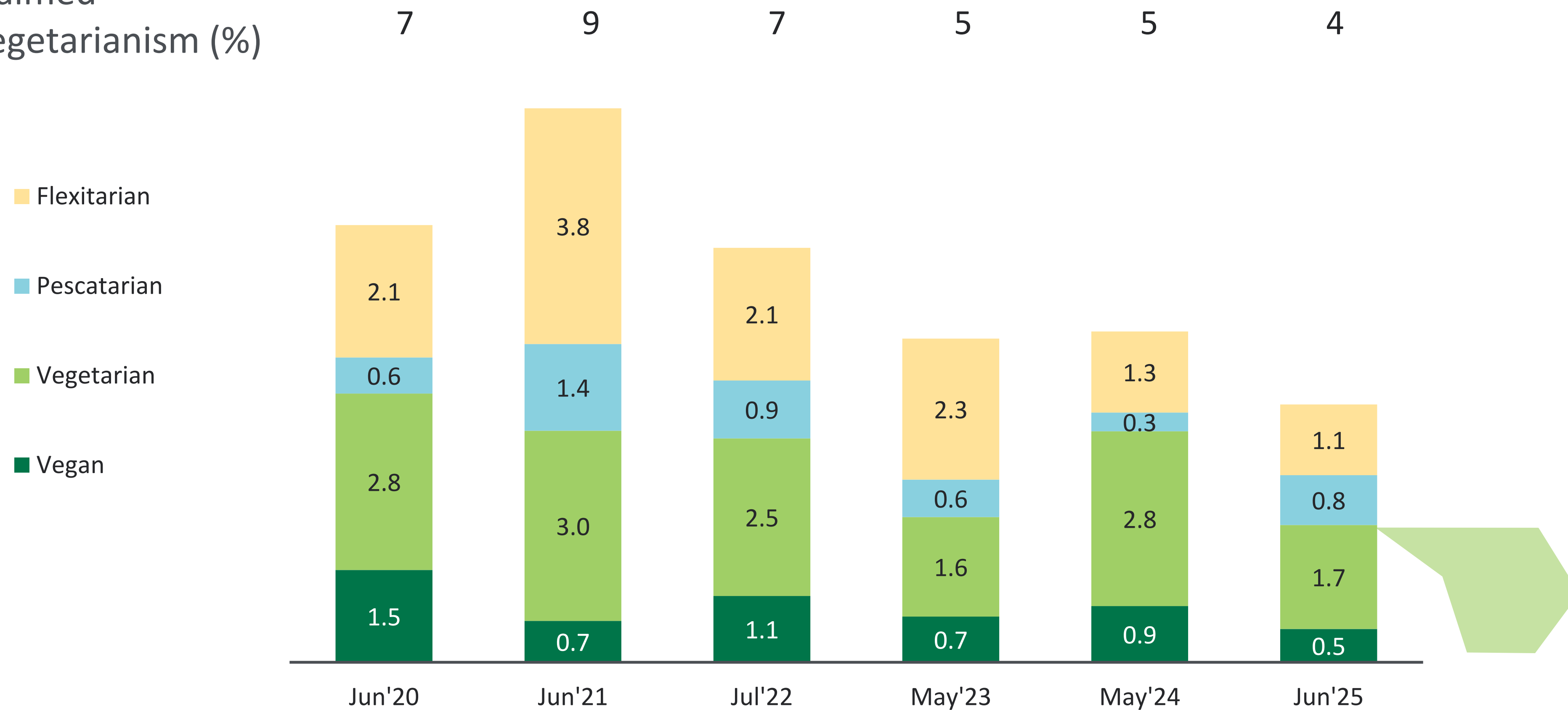
Bases: All meat eaters n=(n=602-1431). Women 18-34 n=(n=243-362). Women 35-64 n=(n=484-625). Men 18-34 n=(n=161-193). Men 35-64 n=(n=333-396)

Vegetarianism is also at an all-time low



Consumption

Claimed Vegetarianism (%)



Once we remove flexitarians and pescatarians 'true vegetarians' are only 2% of the population

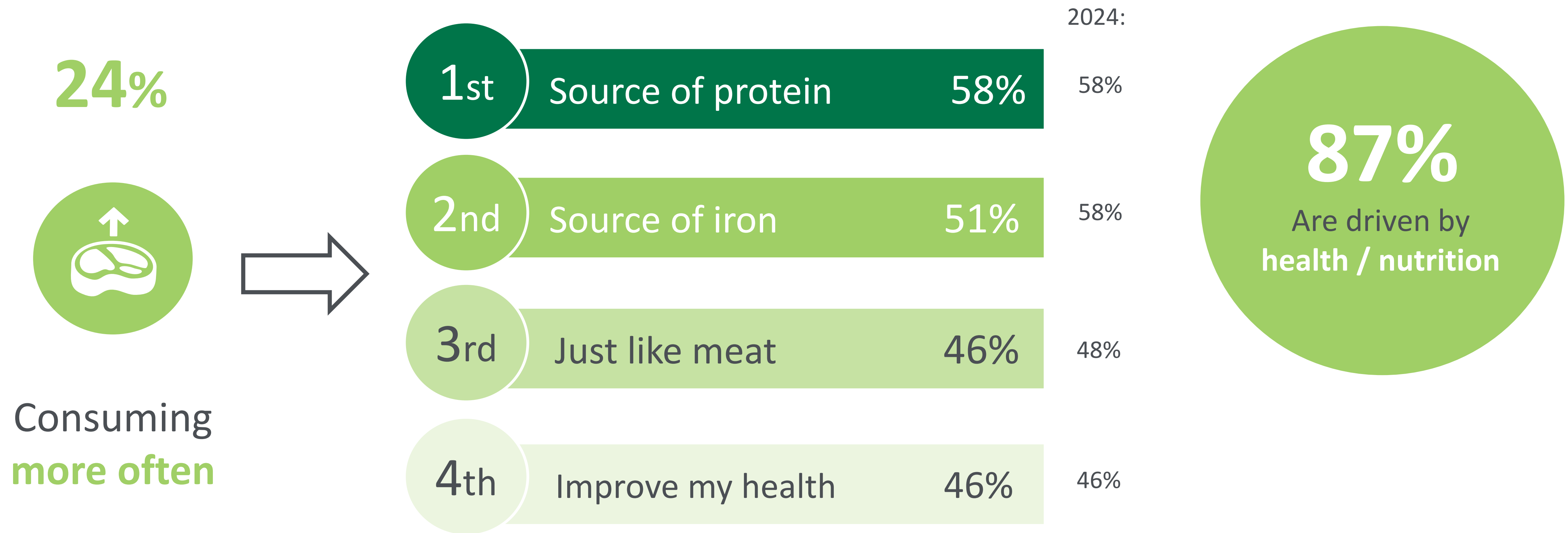
↓ Significant decrease vs. May 24
 ↑ Significant increase vs. May 24

The *nutritional goodness of red meat* remains the key driver to consume more



Consumption

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



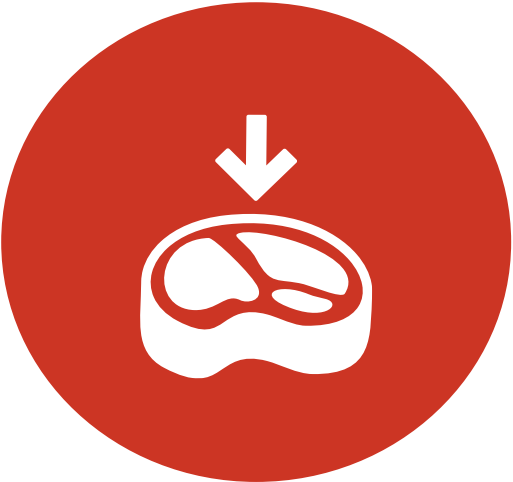


Consumption

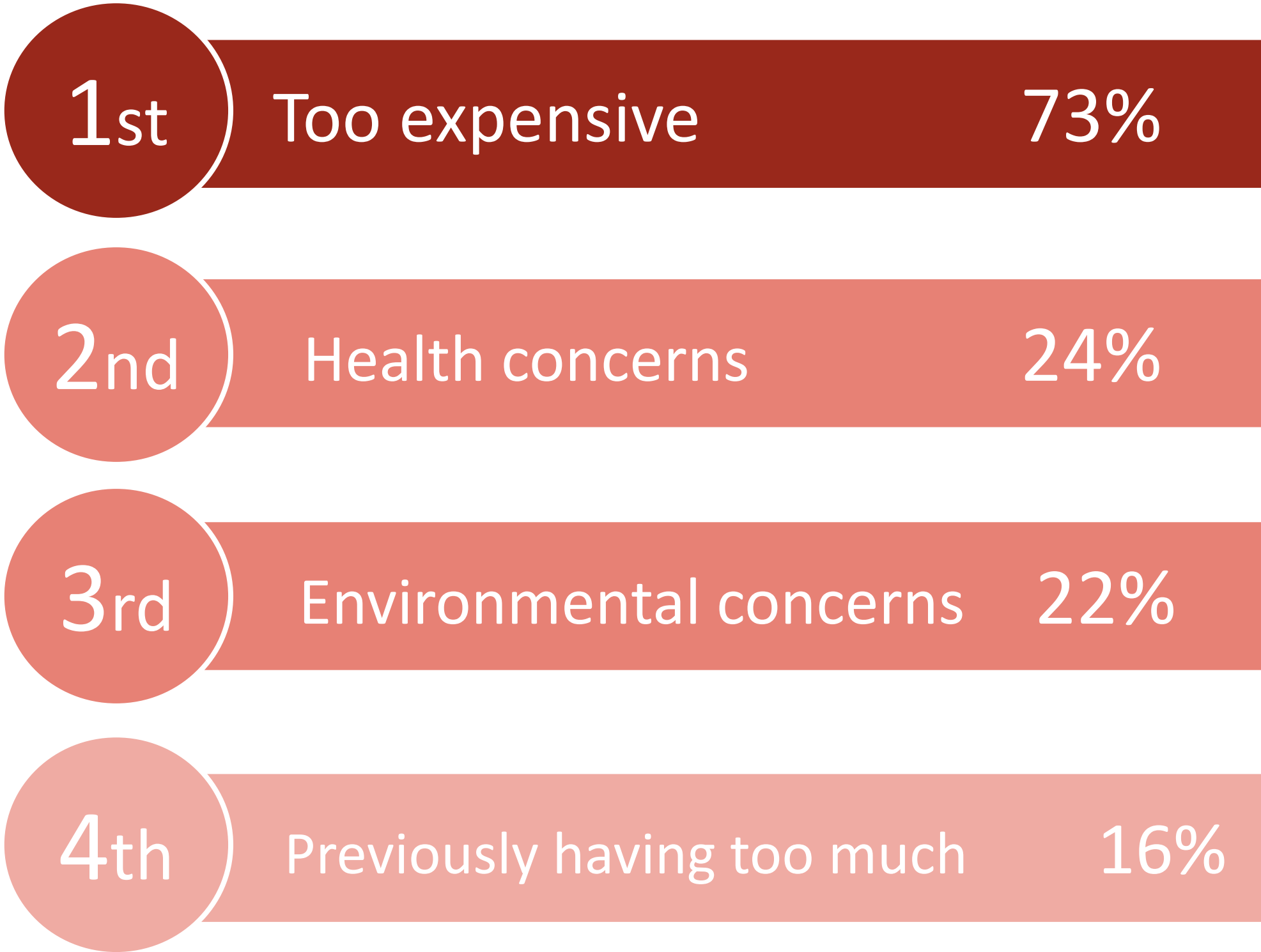
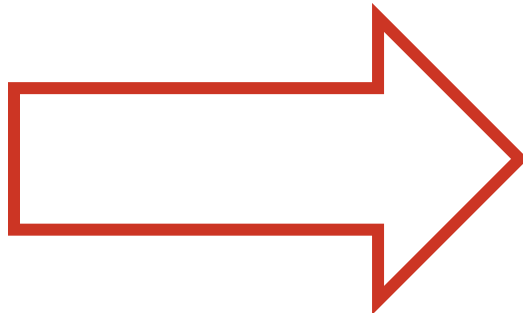
While Cost remains the top reason to reduce (by far)

Top reasons for eating less red meat (multi-select) (%) | Red meat reducers

22%



Consuming less often



2024:

74%

27%

25%

18%



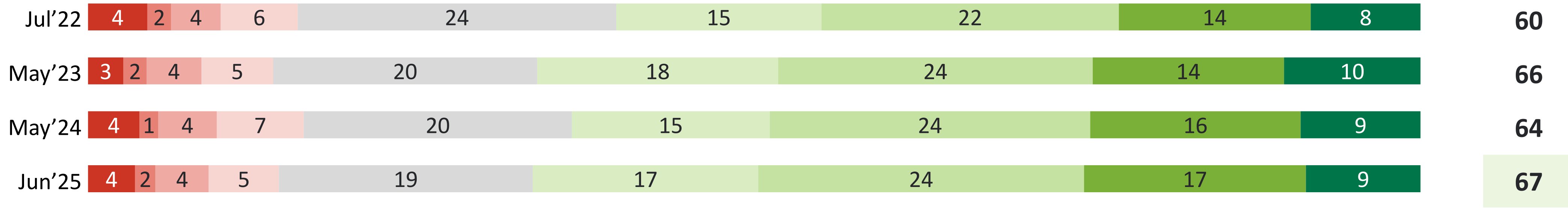
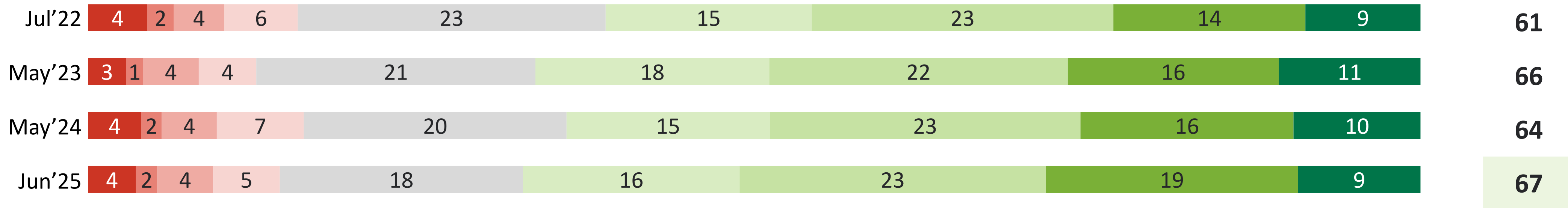
Trust

Trust has improved a little and is the highest we've seen

Trust in industry to do what is right (%)

1 - I do not trust them at all 2 3 4 5 6 7 8 9 - I trust them a great deal

NET Trust



↓ Significant decrease vs. May 24 ↑ Significant increase vs. May 24

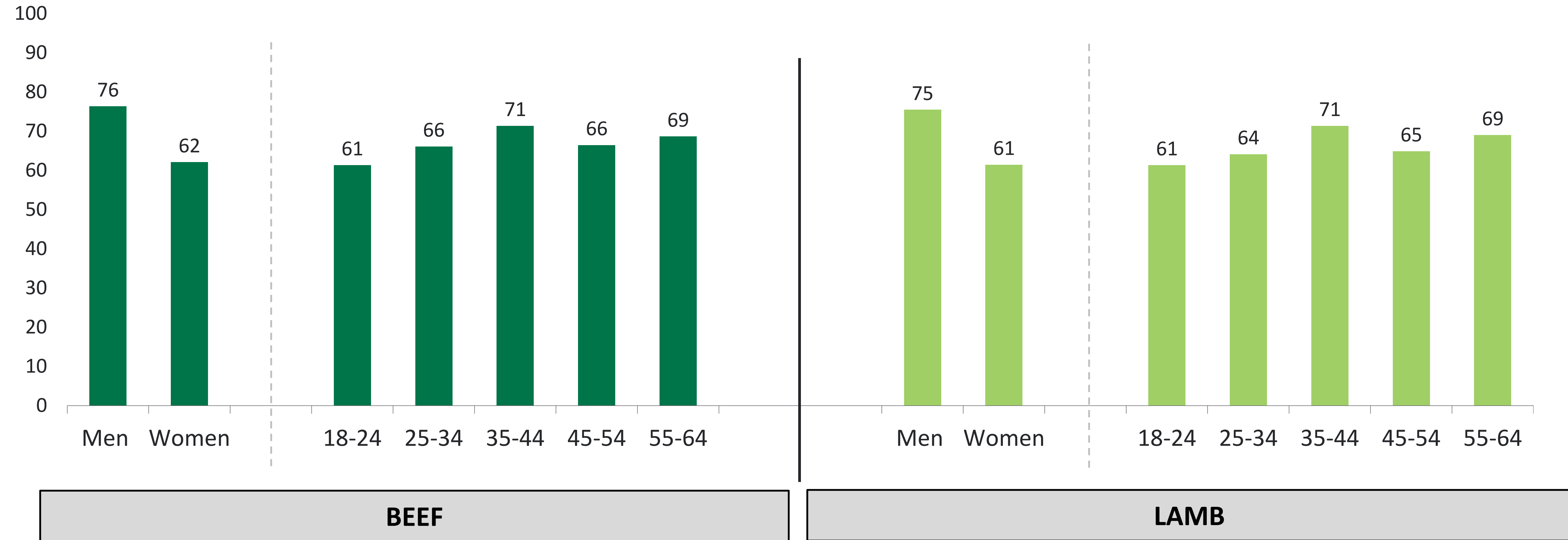


Trust is weakest among Gen Z and among women



Trust

Trust to do what is right (6-9 / 9) – by demo group (%)





Trust

The red meat industry is trusted more than the pork and chicken industries

Trust in industry to do what is right (%)



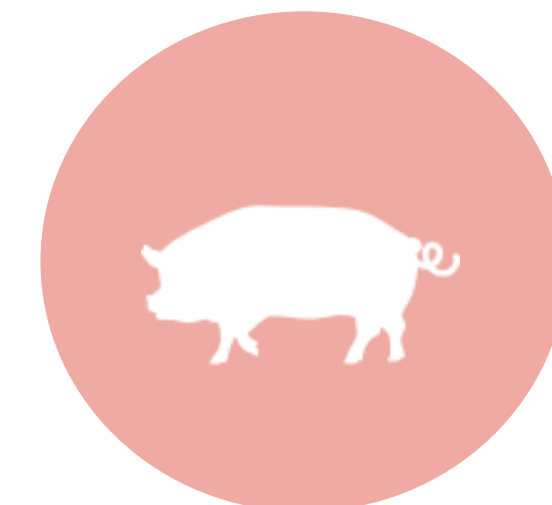
67%



64%



67%



59%



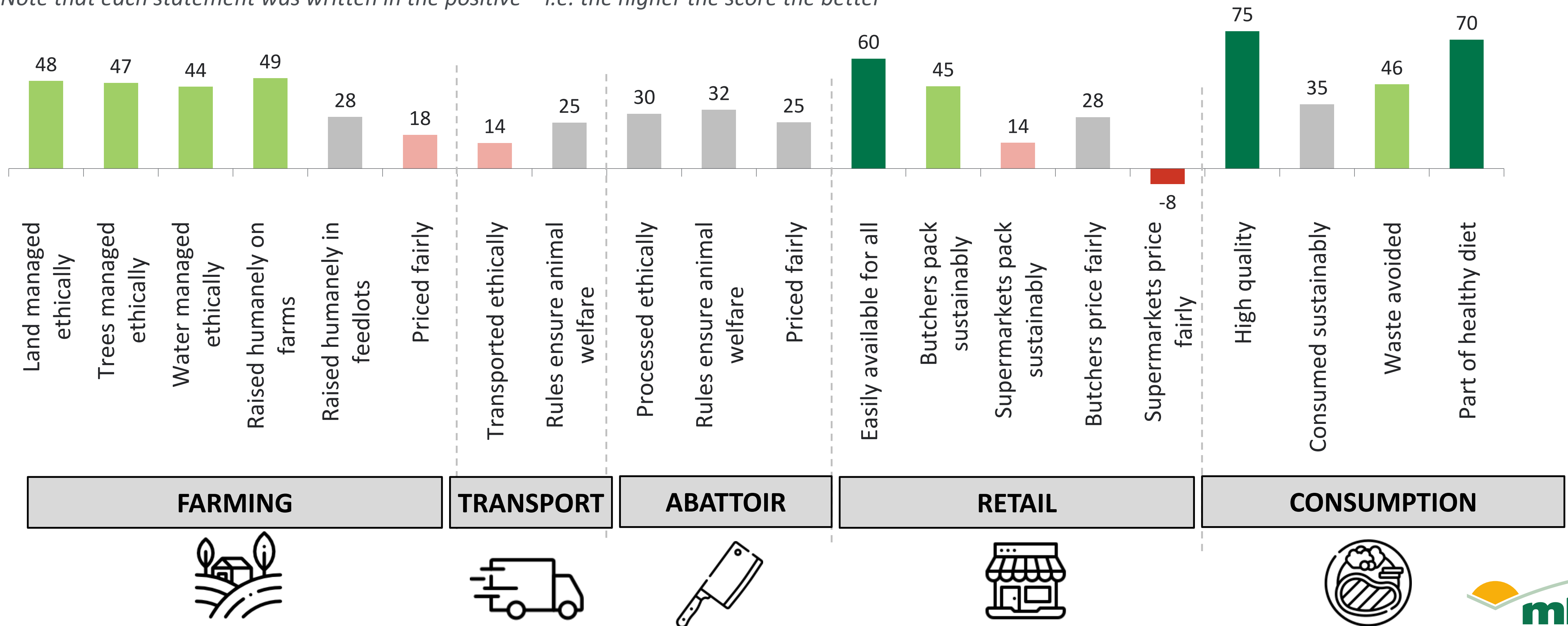
Trust across the value chain.

In general more people trust the red meat industry *at every stage* than distrust. Supermarket prices are the only exception



% agree minus % disagree with each statement

Note that each statement was written in the positive – i.e. the higher the score the better





Trust Drivers

Drivers of industry trust (%)

Environmental action	22%
Transparent and responsive	22%
Ethical Practices	21%
Regulations and standards	20%
Economic contribution	12%
Complexity of industry issues	4%

Trust in the Australian beef/lamb industry

The top drivers of trust are environmental action, being transparent and responsive, and ethical practices

Perceptions across the drivers of trust are improving marginally, for both Beef and Lamb



Trust Drivers

	Measure	BEEF			LAMB		
		May'24	Jun'25	GAP	May'24	Jun'25	GAP
Environmental action	I have confidence that cattle/sheep farmers are reducing their net greenhouse gas emissions	41	44	+3	41	44	+3
	The Australian beef/lamb industry is doing all it can to reduce its impact on the environment	40	47	+7 ↑	40	45 ↑	+5
	Australian cattle/sheep farmers care about the environment	53	54	+1	52	54	+2
	Australian beef/lamb is environmentally friendly and sustainable	44	47	+3	44	46	+2
	Australian cattle/sheep farmers make a positive contribution to society	63	64	+1	62	63	+1
Transparent and responsive	The Australian beef/lamb industry is transparent / open and honest with the public about their practices	-	44	-	-	45	-
	The AU beef/lamb industry is prepared to change their practices in response to community concerns	44	44	0	40	45	+5
	The Australian beef/lamb industry listens to and respects community opinions	44	49	+5	43	44	+1
Ethical practices	Australian cattle/sheep are farmed and raised in a humane manner	55	55	0	55	56	+1
	Australian cattle/sheep farmers are ethical and trustworthy	53	56	+3	53	55	+2
Regulations and standards	Current regulation of the Australian beef/lamb industry is effective	45	49	+4	42	46	+4
	Standards developed for the AU beef/lamb industry ensure people in those industries do the right thing	59	62	+3	57	58	+1
Economic contribution	The Australian beef/lamb industry generates significant local jobs in regional areas	74	72	-2	70	71	+1
	The Australian beef/lamb industry is an important part of the Australian economy	79	77	-2	72	72	0
Complexity of industry issues	Animal welfare in the Australian beef/lamb industry is a complex issue	61	61	0	56	60	+4
	Environmental management in the Australian beef/lamb industry is a complex issue	64	64	0	57	56	-1

↓ Significant decrease vs. May 24

↑ Significant increase vs. May 24

Green highlight = notable uplift (significant or not)



Trust Drivers

Gen Z continue to score both industries lower across all trust drivers

Drivers of industry trust (%)	BEEF		LAMB	
	Whole sample avg. scores (%)	18-24yrs avg. scores (%)	Whole sample avg. scores (%)	18-24yrs avg. scores (%)
Environmental action	22%	51%	50%	47%
Transparent and responsive	22%	46%	44%	41%
Ethical Practices	21%	56%	55%	47%
Regulations and standards	20%	56%	52%	45%
Economic contribution	12%	74%	71%	55%
Complexity of industry issues	4%	63%	58%	41%

High / Low compared to Total



Tested at 95% confidence level. Note the difference between Metro sample and 18-24 yrs scores are not significant

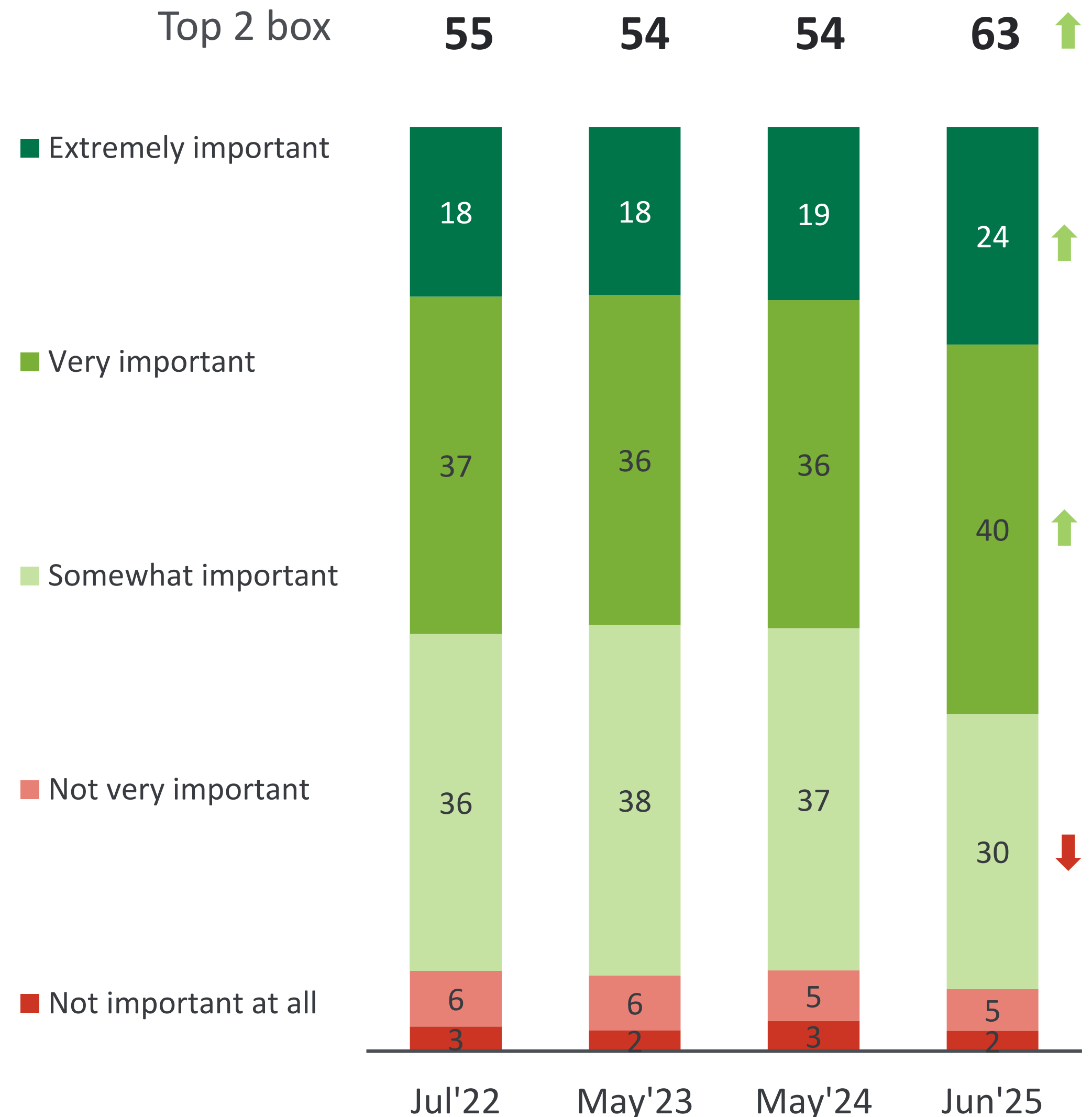
Sustainability is important to more Australians this wave



Importance of sustainability to you (%)



Sustainability



↓ Significant decrease vs. May 24

↑ Significant increase vs. May 24

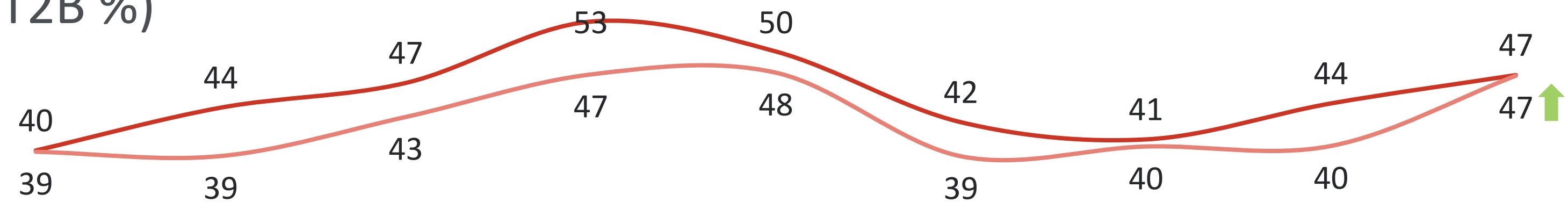
Perceptions around industry efforts in sustainability have improved this wave



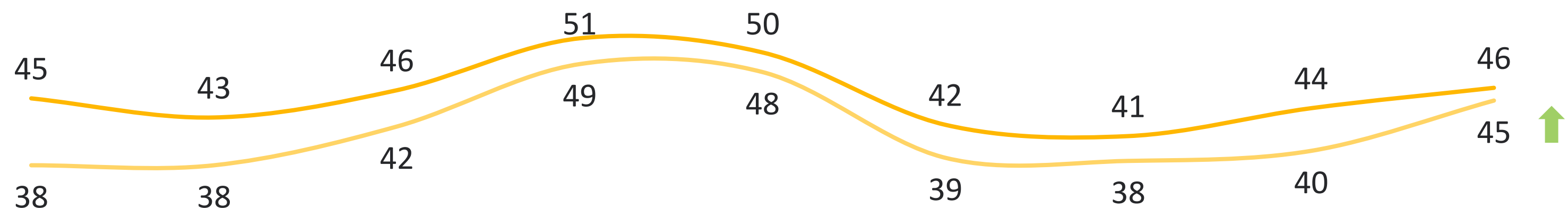
Sustainability

Attitudes towards sustainability (T2B %)

- is environmentally friendly and sustainable
- doing all it can to reduce its impact on the environment



- is environmentally friendly and sustainable
- doing all it can to reduce its impact on the environment



Jun'17 Jun'18 Jun'19 Jun'20 Jun'21 Jul'22 May'23 May'24 Jun'25

↓ Significant decrease vs. May 24 ↑ Significant increase vs. May 24



Those who care more about the environment are more likely to believe that beef and lamb are environmentally friendly



Sustainability

Agreement that: Australian beef / lamb is environmentally friendly and sustainable (%)

NET Agree

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree



Environmental Sustainability **EXTREMELY** or **VERY** important (T2B)



NET Agree 51 ↑



Environmental Sustainability **SOMEWHAT** or **NOT** important (B3B)



NET Agree 42



Environmental Sustainability **EXTREMELY** or **VERY** important (T2B)



NET Agree 50 ↑



Environmental Sustainability **SOMEWHAT** or **NOT** important (B3B)



NET Agree 40

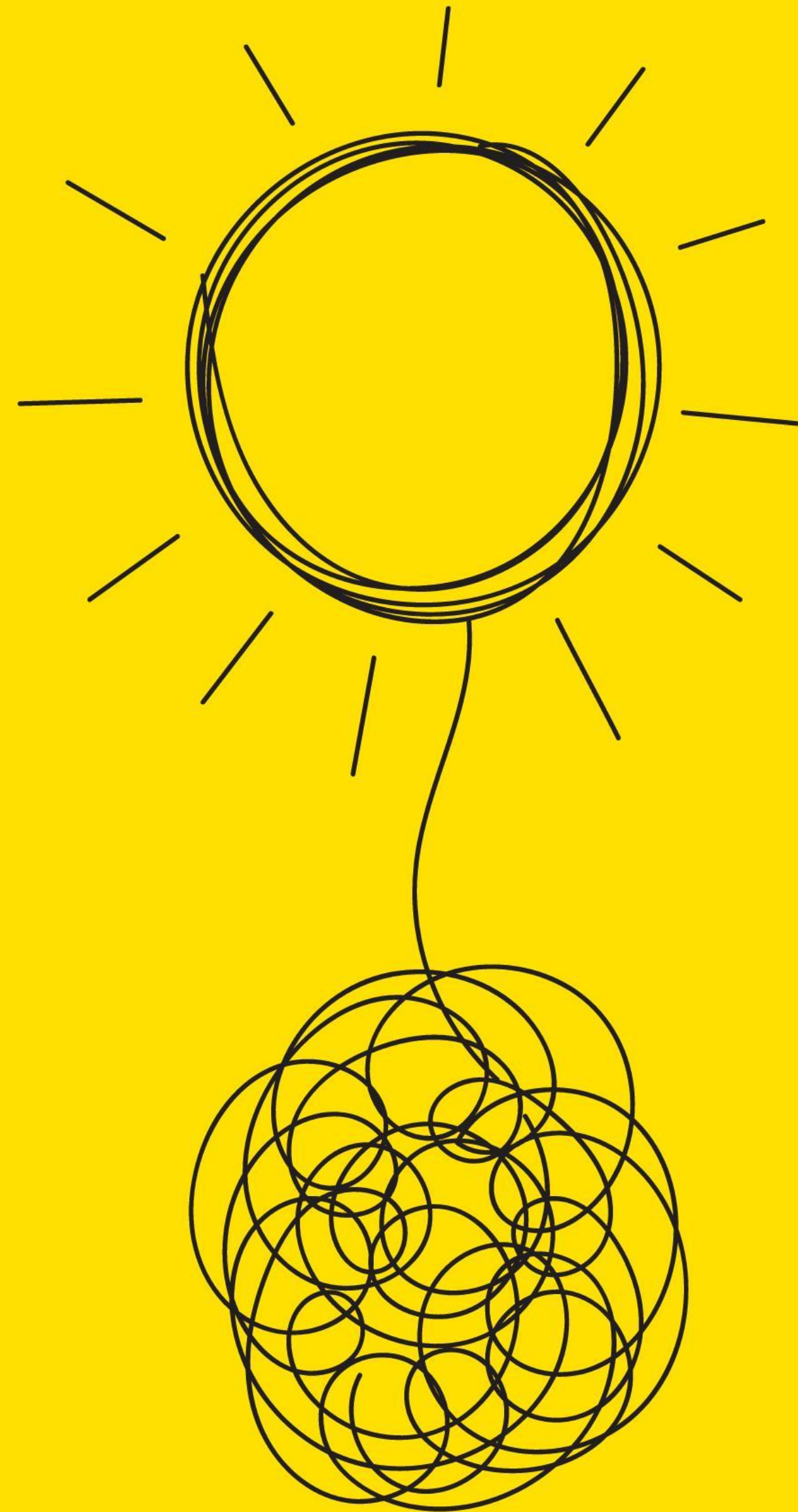


↓ Significantly lower than others ↑ Significantly higher than others



MEAT & LIVESTOCK AUSTRALIA

Summary: Key 2025 insights



1. For the first time, more Australians claim to have to increased **red meat consumption** than decreased. Vegetarian rates are also at an all-time low.



2. **Trust** is at the highest level seen to date with 67% of Australian trusting industry to do the right thing. 69% trust red meat producers to provide safe, nutritious and sustainable produce.



3. **Drivers of trust** are improving. These drivers include ethics, sustainability, transparency and responsiveness.



4. **Sustainability** continues to increase in importance. Those who think sustainability is important are more likely to believe that the red meat industry is environmentally sustainable.



5. **Younger females** have lower perceptions towards the red meat industry across most perceptions, and hence lower levels of trust and social capital index score.

Terms of use: MLA data, reports and information



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

1. General

- 1.1 The reports, data and information provided to you (Data) are owned by Meat & Livestock Australia Limited (ABN 39 081 678 364) (“MLA”, “we”, “us” or “our”).
- 1.2 “You” or “your” means the person or entity that is provided with a copy of the Data.
- 1.3 Your access to and use of the Data is subject to these terms of use and any additional terms, notices and disclaimers which appear with or in the Data. If you do not agree with the terms, notice and disclaimers, you must not access or use the Data.
- 1.4 MLA may amend these terms of use from time to time and will notify you of any amended terms of use. If you do not agree to the amended terms of use, you should not continue to use the Data. Your continued use of the Data after these terms of use have been amended constitutes your acceptance of them.

2. Limited licence

- 2.1 MLA grants you a non-exclusive, royalty free licence to use the Data solely for your personal and business purposes. MLA may revoke this licence at any time by providing you with at least 14 days’ notice, in which case you must cease all use of the Data on expiry of the notice period.
- 2.2 You must not provide the Data to anyone else.

3. Copyright

- 3.1 All rights (including intellectual property rights such as copyright) in the Data, its content and design are owned by or licensed to MLA.
- 3.2 You must not remove, alter or obscure any copyright notices that appear on the Data.
- 3.3 You must not commercialise any information, content or designs contained in any part of the Data without the prior written consent of MLA.

4. Trade marks, trade names and logos

- 4.1 All trade marks, trade names, service marks and other names and logos on the Data are owned by or licensed to MLA and are protected by applicable trade mark and copyright laws.
- 4.2 You must not remove, alter or obscure any trade marks, trade names and other names and logos that appear on the Data.

5. Collection of information

- 5.1 If MLA requires you to provide personal information in connection with your receipt of the Data, MLA will collect, store, use and disclose this information in accordance with its privacy policy (found at www.mla.com.au/General/Privacy) and you consent to this.

6. Disclaimer and liability

- 6.1 You acknowledge that the Data is provided on an ‘as is’ basis and MLA makes no representations regarding the completeness or accuracy of the Data and, to the extent permitted by law, expressly excludes all warranties and guarantees regarding the accuracy, completeness or currency of the information, recommendations and opinions contained in the Data.
- 6.2 Information in the Data may be obtained from a variety of third party sources. You acknowledge that MLA has not verified all third party information in relation to accuracy or otherwise. You further acknowledge that: (a) any forecasts and projections are imprecise and subject to a high degree of uncertainty; and (b) the Data provided may be a snapshot of certain markets and not reflect that market as a whole.
- 6.3 The information, raw data, recommendations and opinions contained in the Data do not take into account and may not be appropriate for your individual circumstances. You should make your own enquiries and seek professional advice before making decisions concerning your interests, or otherwise interpreting or relying on the Data in any way. Any reliance will be at your own risk and MLA accepts no liability for any loss, damage, cost or expense arising from any use or misuse of the Data.
- 6.4 Nothing in these terms of use is intended to exclude, restrict or modify rights, guarantees and remedies that may be conferred on you under the Competition and Consumer Act 2010 (CCA) in relation to the provision by MLA of goods and services. All other rights, guarantees and remedies are excluded.
- 6.5 To the extent permitted by law, MLA’s liability for breach of any consumer guarantee, which cannot be excluded, is limited at the option of MLA to:
 - (a) in the case of services supplied or offered by MLA, which are not of a kind ordinarily acquired for personal, domestic or household use or consumption, resupplying or paying the cost of resupplying the service; or
 - (b) in the case of goods supplied or offered by MLA, which are not of a kind ordinarily acquired for personal, domestic or household use or consumption, replacing the goods, supplying equivalent goods, repairing the goods or paying the cost of replacing the goods, supplying equivalent goods or repairing the goods.
- 6.6 MLA will not be liable for any loss of profit or for any direct, special, indirect, consequential or economic loss or damage.

7. Indemnity

- 7.1 You indemnify MLA against all damages, losses, costs and expenses incurred by MLA arising out of, or in connection with, your breach of these terms of use or use of the Data.

8. Governing law

- 8.1 These terms of use are governed by the law applicable in the state of New South Wales, Australia.