



Australian community sentiment research 2024





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Sample profile

A robust, representative sample of n=1501 main grocery buyers and main meal preppers aged 18-64, across the five main capital cities in Australia, May 2024.

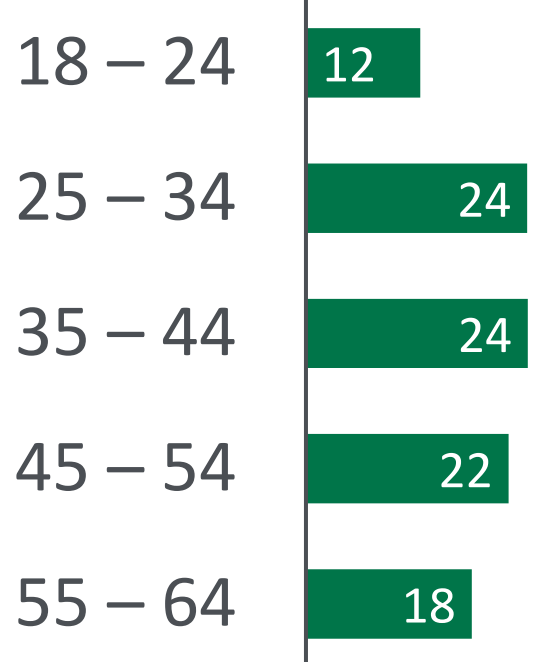
First research undertaken 2010, annually since then by Pollinate, third party research company.

Gender

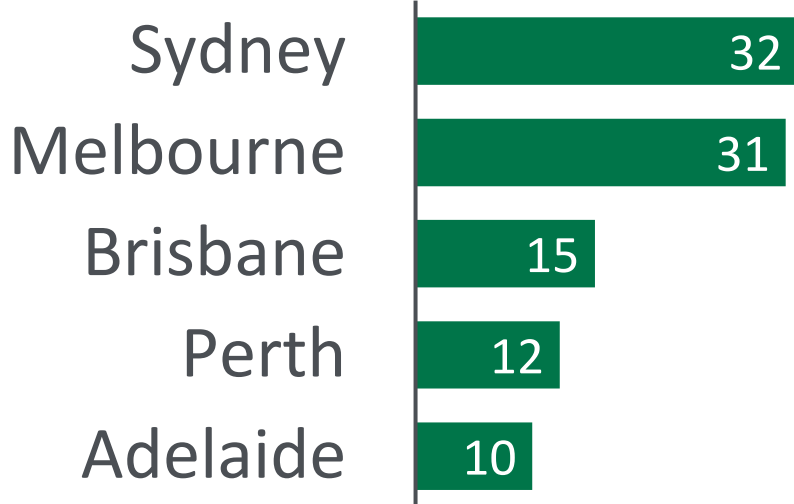


Female 62
Male 38

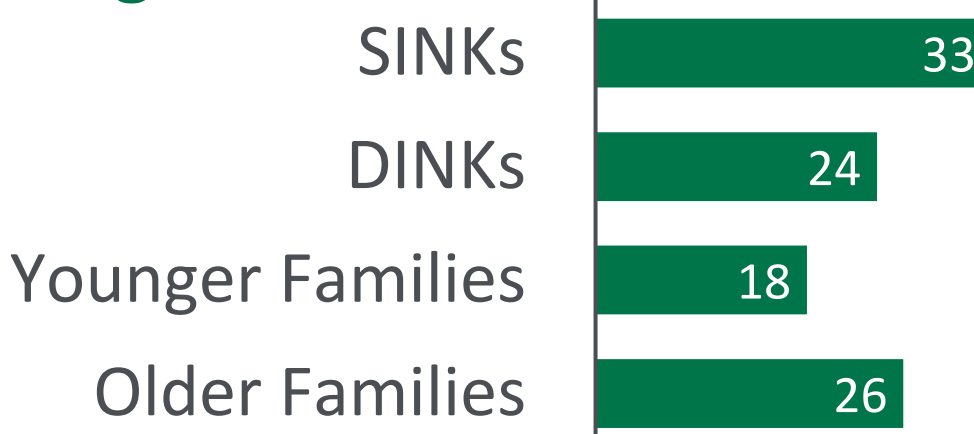
Age



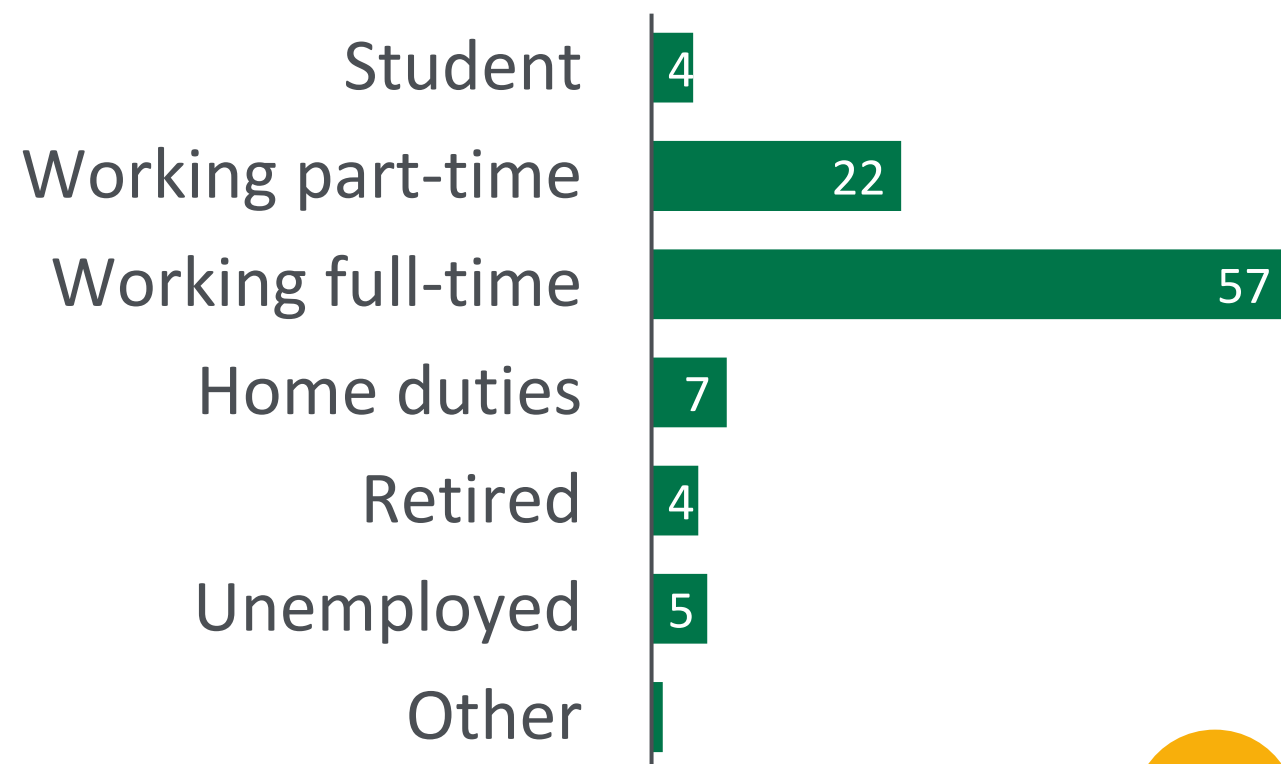
Location



Life stage



Employment

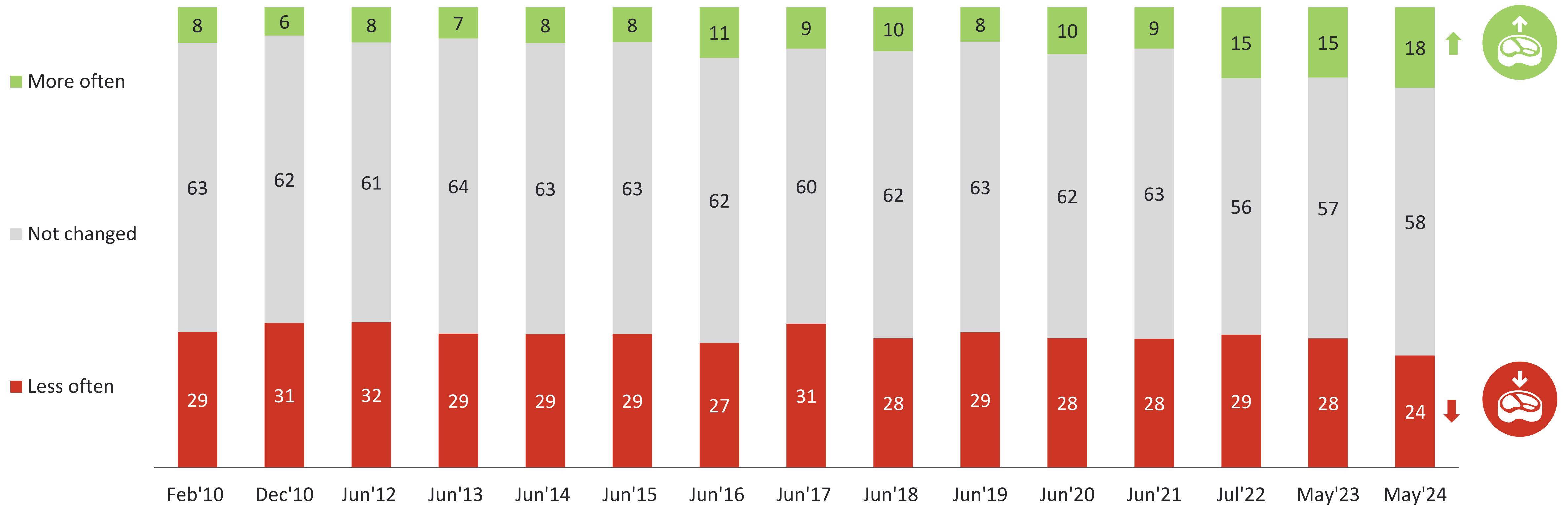




Consumption

Majority with no change in consumption of red meat, however there is a gradual increase in red meat increasers, with further decline in those reducing their consumption

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



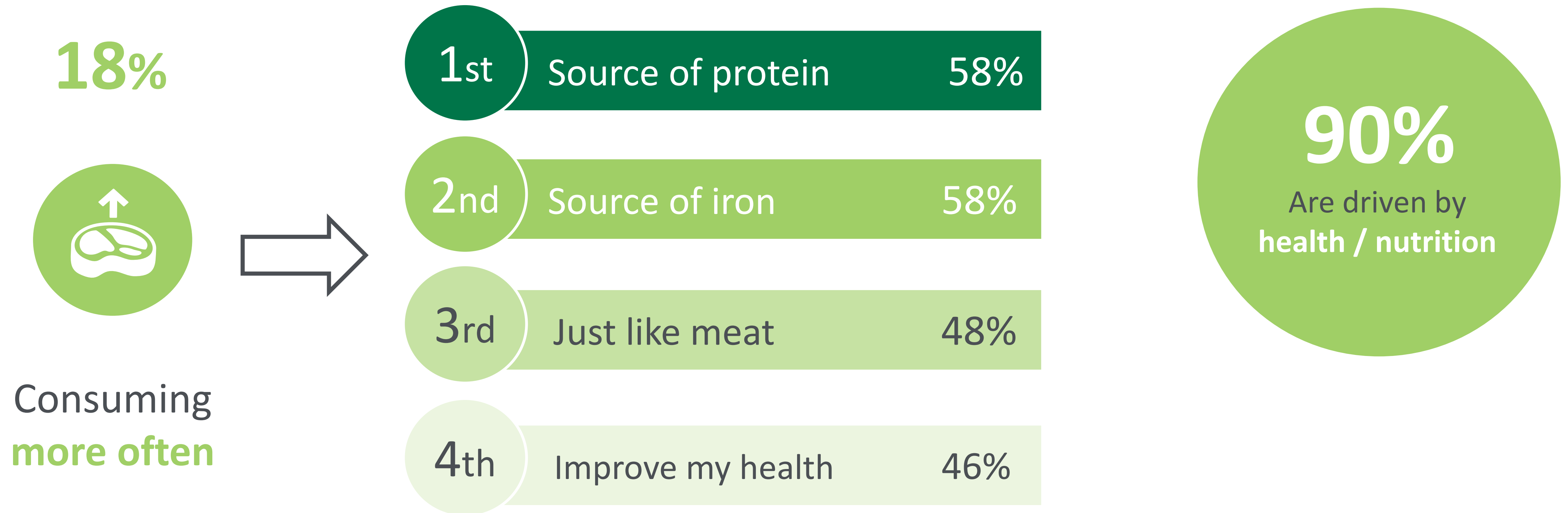
↓ Significant decrease vs. May 23 ↑ Significant increase vs May 23

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

Base n=(n=602-1425)

The top reasons for increasing red meat consumption revolve around health and nutrition, particularly iron and protein, with almost half also claiming that they just like meat!

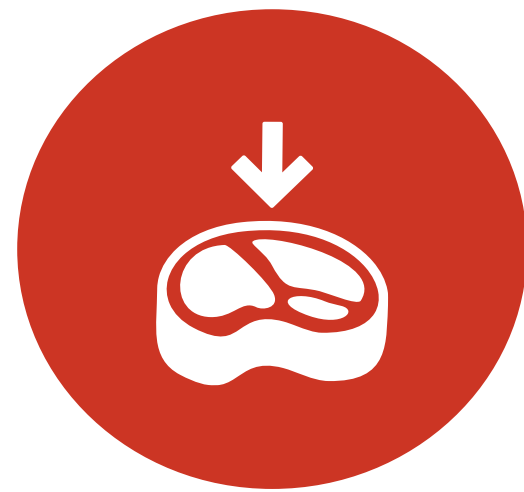
Top reasons for eating more red meat (%) | Red meat increasers



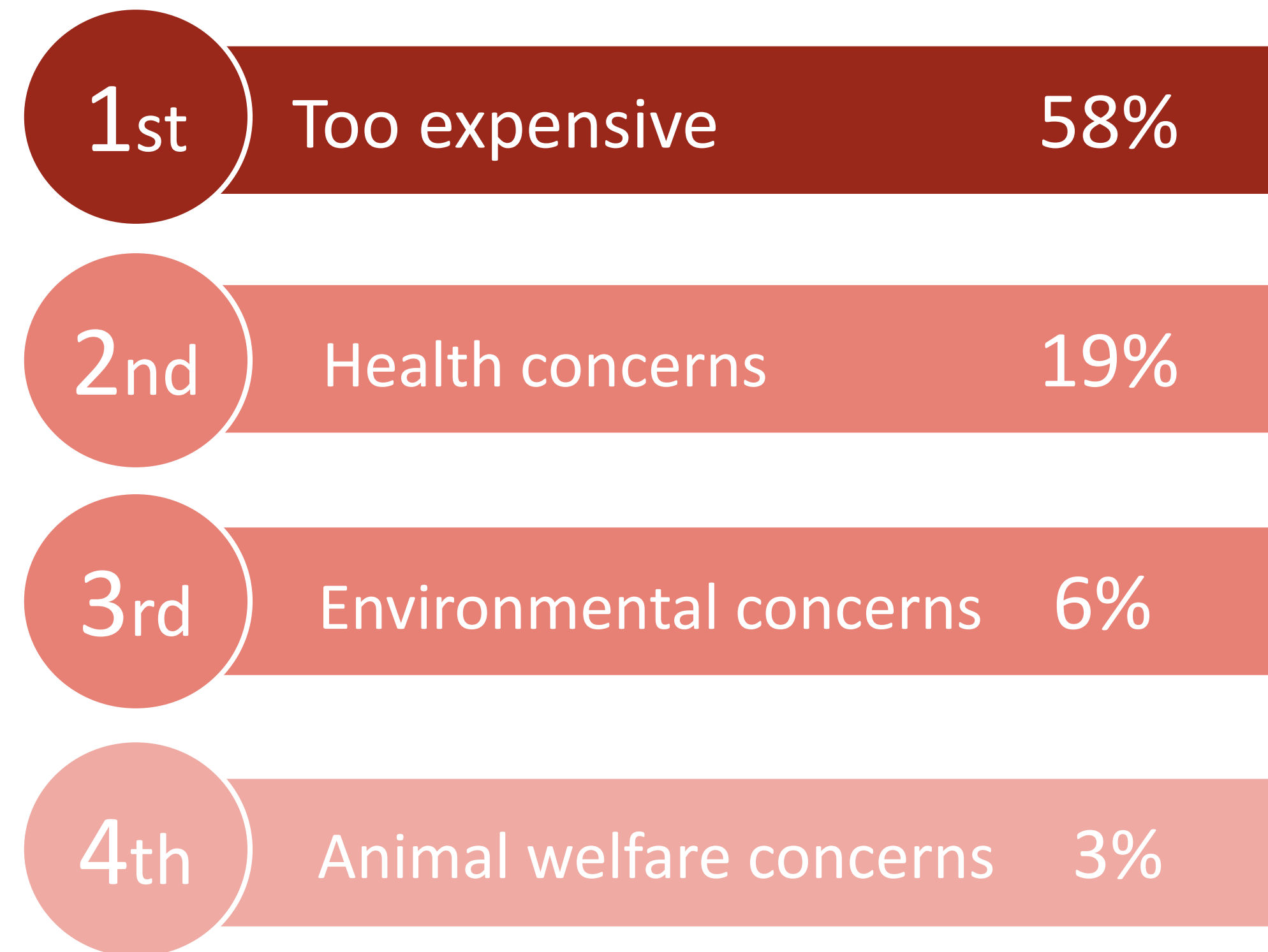
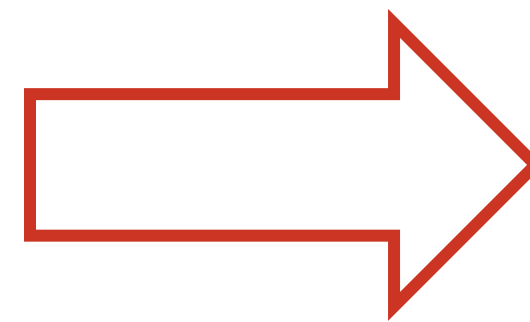
Cost is by far the main reason for reducing red meat consumption, as red meat is a relatively higher priced protein

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

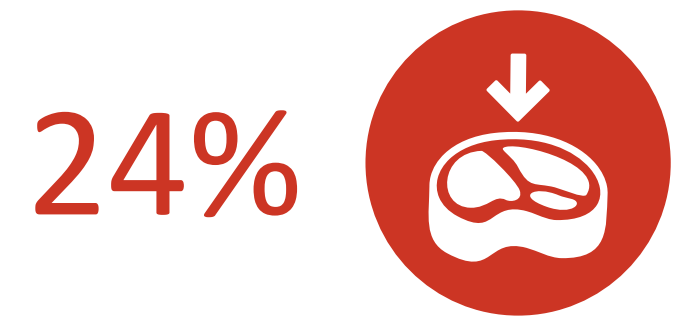
24%



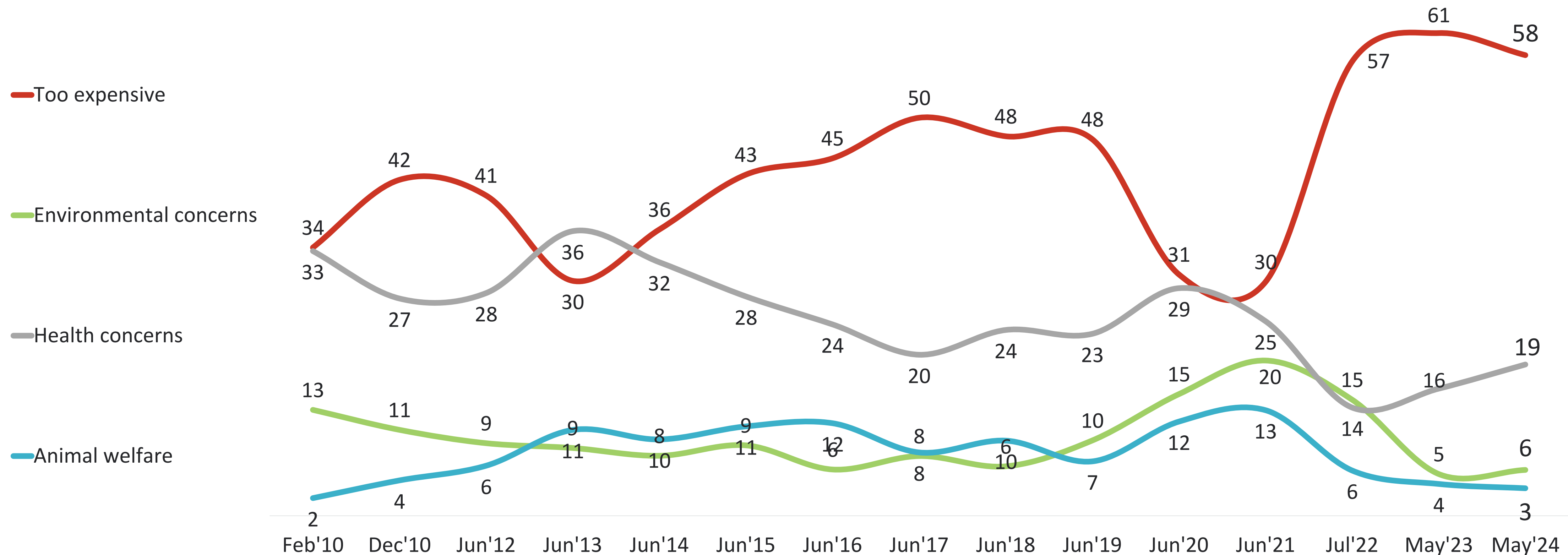
Consuming
less often



Cost remains main reason to reduce consumption, with health concerns starting to trend upwards, and environment and animal welfare relatively stable



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




↓ Significant decrease vs. May 23 ↑ Significant increase vs. May 23

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 (incl vegan), remaining low after last year's decline

5% 

Are you a vegetarian? (%)



↓ Significant decrease vs. May 23 ↑ Significant increase vs. May 23

S7. Are you a vegetarian? Base. Total sample by wave n=1500-1556

True Vegetarians/Vegans represent a small proportion of the population

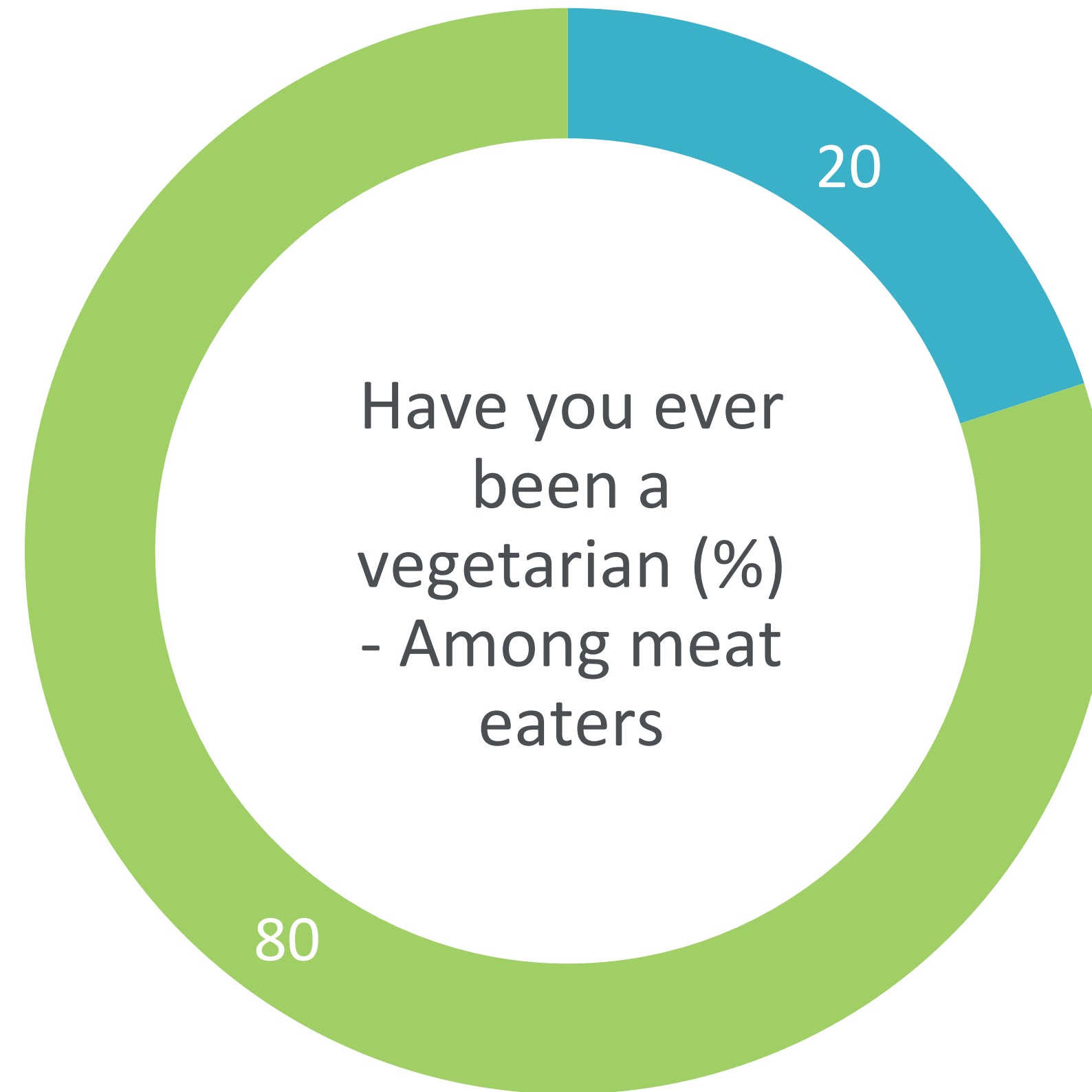


S7B. Do you eat any of the following? Base: Those who claim to be vegetarian n=80. "Meat" includes chicken and fish/seafood

20%




1 in 5 meat eaters have been a vegetarian in the past, indicating some meat eaters trial going vegetarian, but return to meat at some stage!

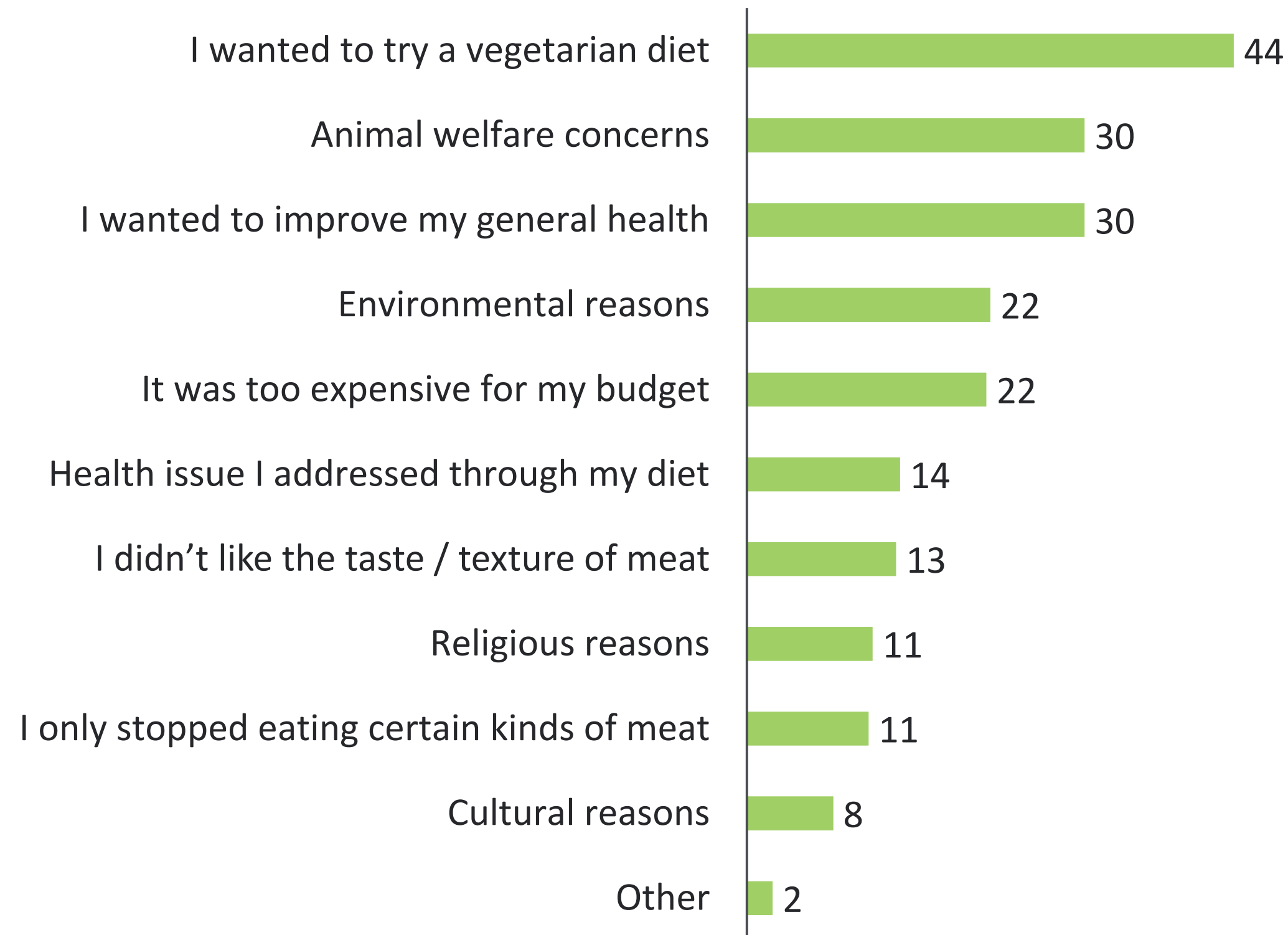


■ Yes ■ No

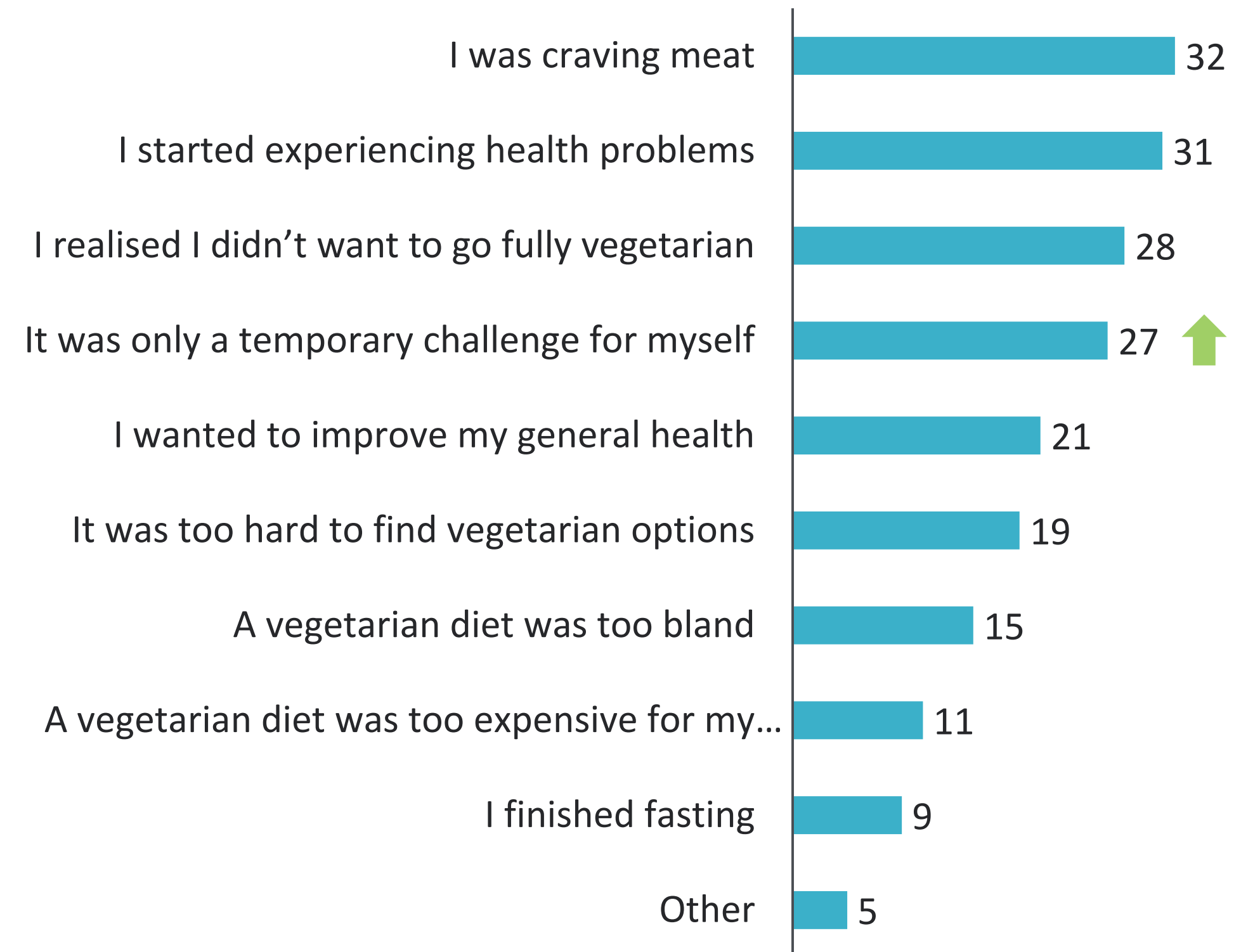
Ex-vegetarians tend to stop eating meat just to try a vegetarian diet, then they start eating meat again mainly due to cravings and health reasons

20% 

Reasons stopped eating meat (%)
Among meat eaters who had stopped



Reasons to start eating meat again (%)
Among meat eaters who had stopped



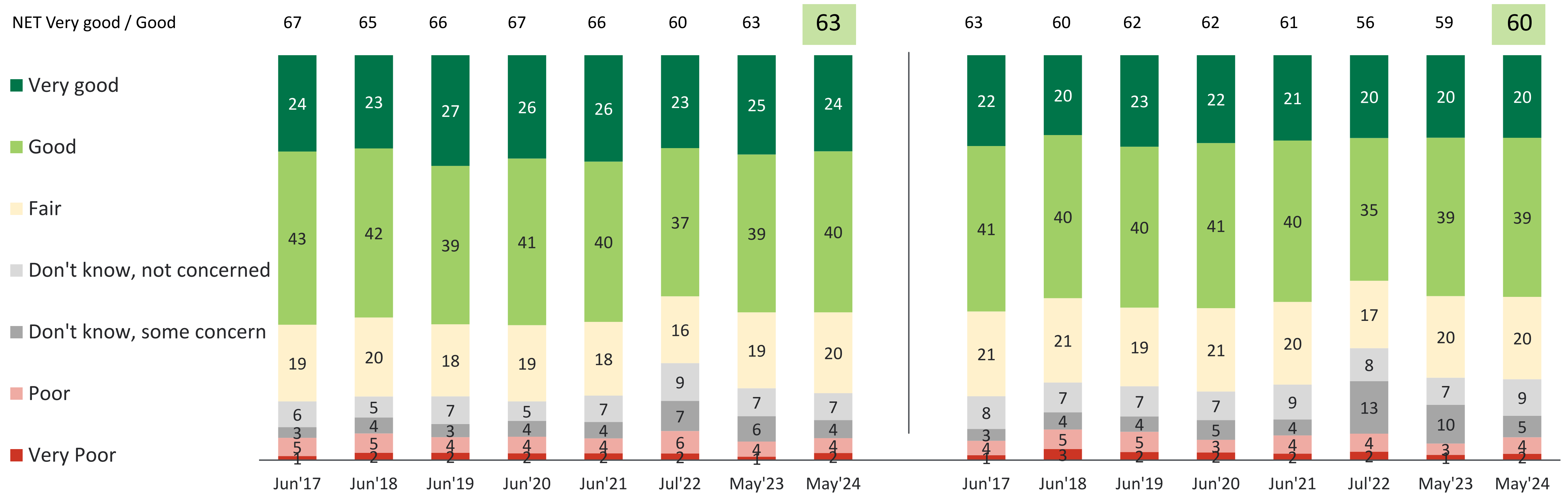
 Significant decrease vs. May 23  Significant increase vs. May 23



Community perceptions of the industry

Overall community perceptions of the red meat industry are largely positive and stable. Very few have negative perceptions.

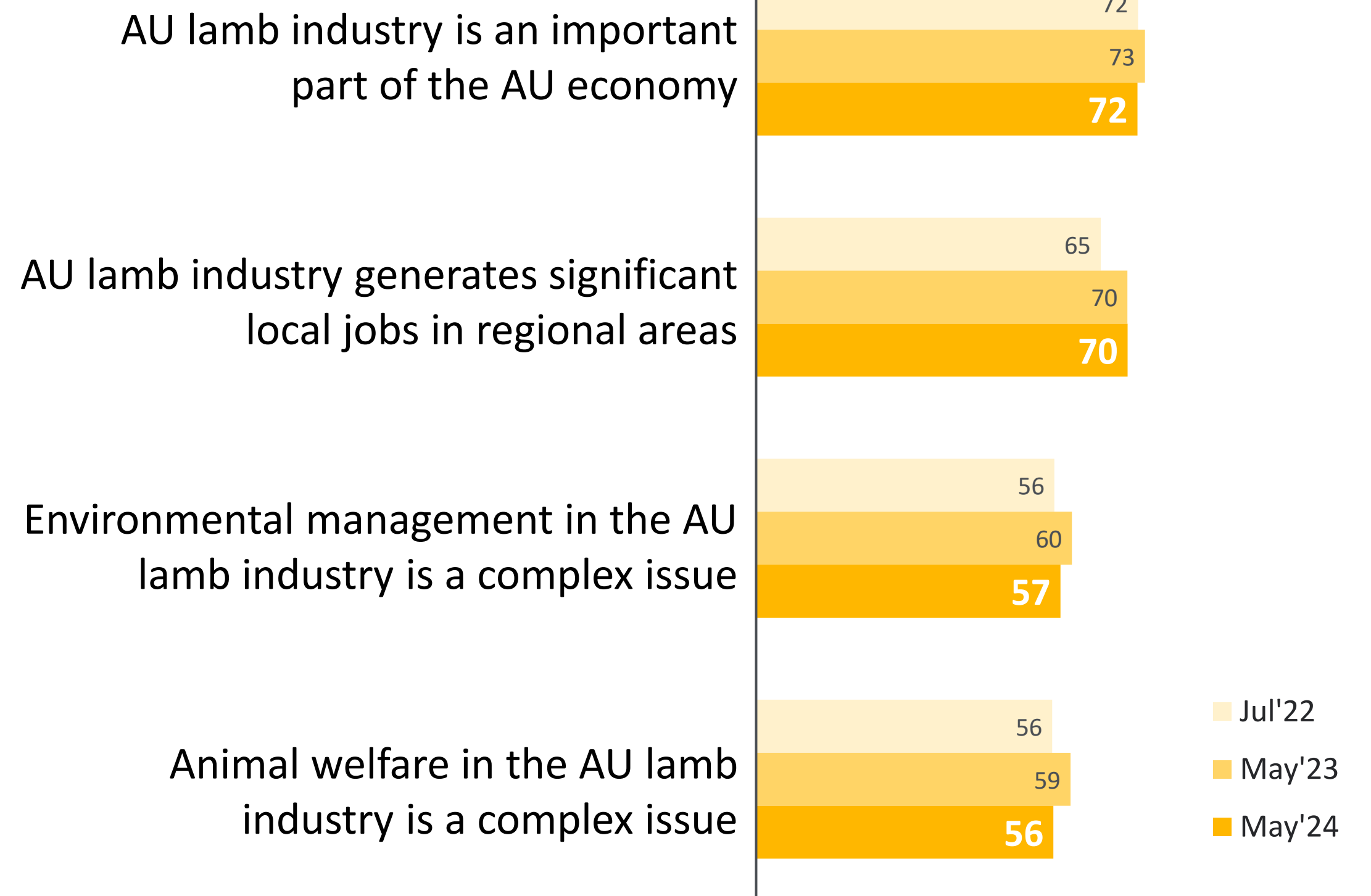
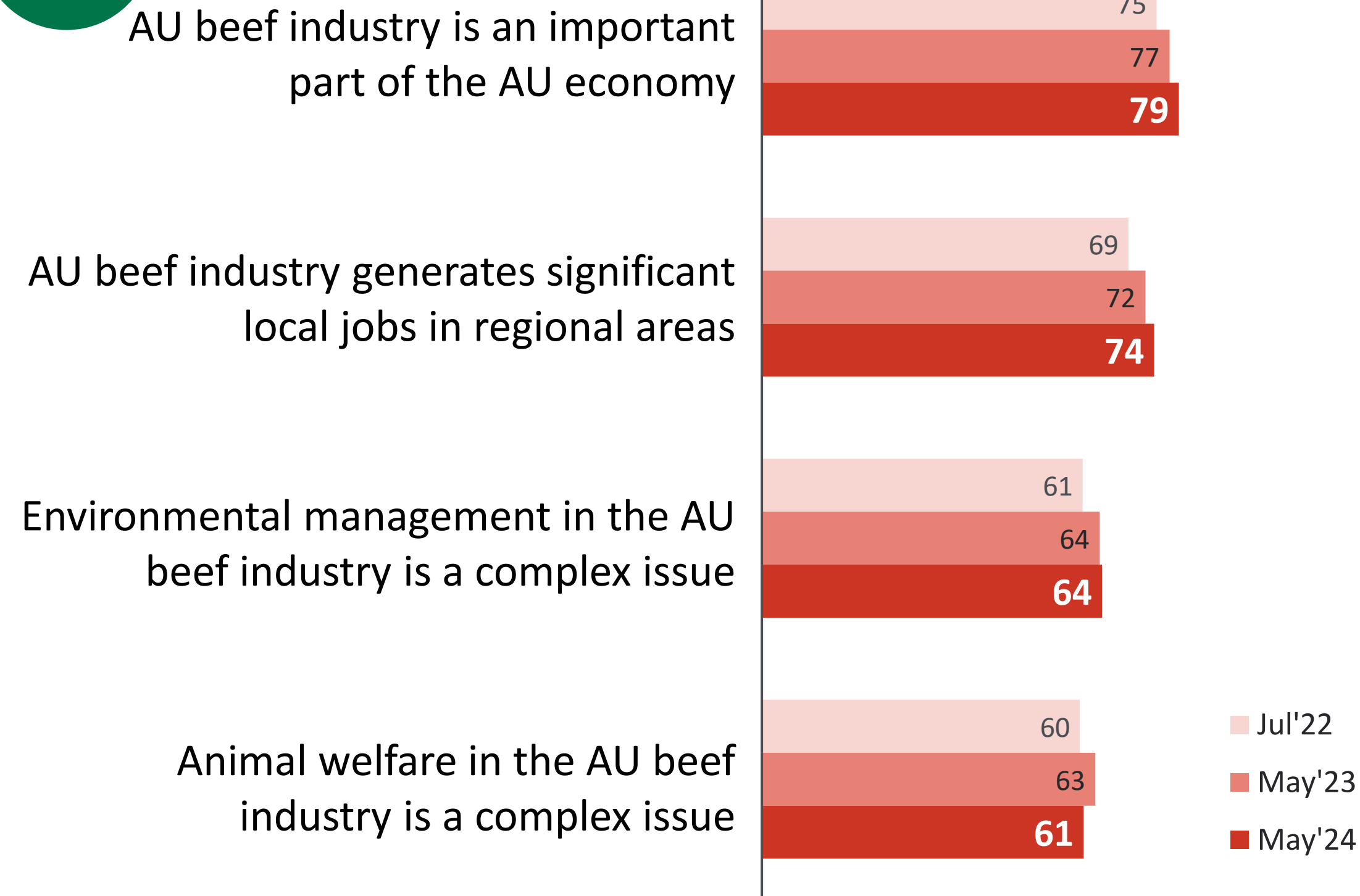
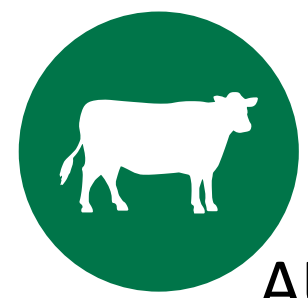
Consumer perceptions of Australian beef /lamb industries (%) – Among meat eaters



X1. Thinking about the production of the following foods in Australia, how do you feel about each industry? The Australian _____ industry is... Base n=1288-1434

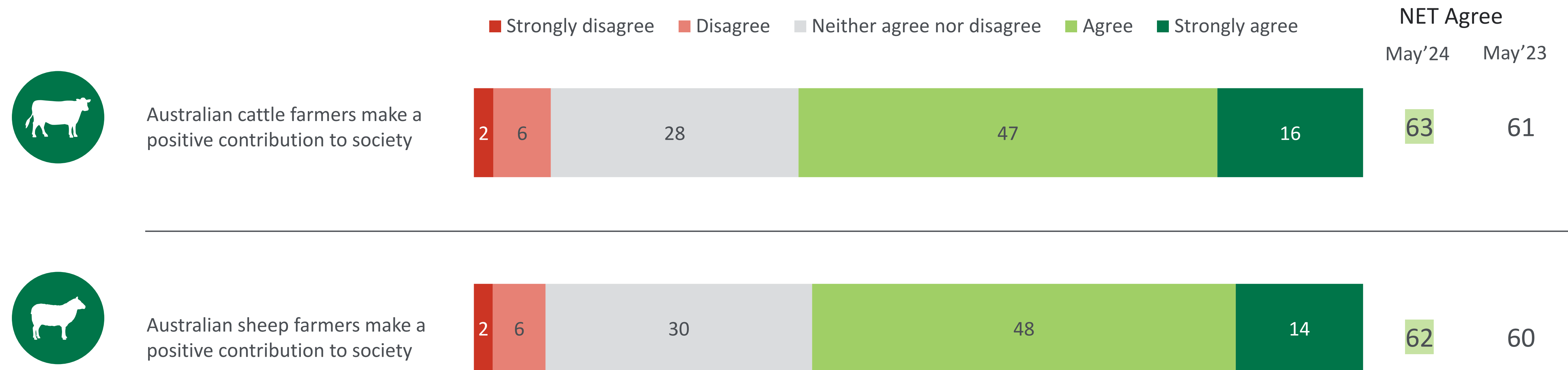
Most Aussies see the red meat industry as vital to the Australian economy and job creation

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



Most feel cattle and sheep farmers contribute positively to Australian society, slight increase on previous year results

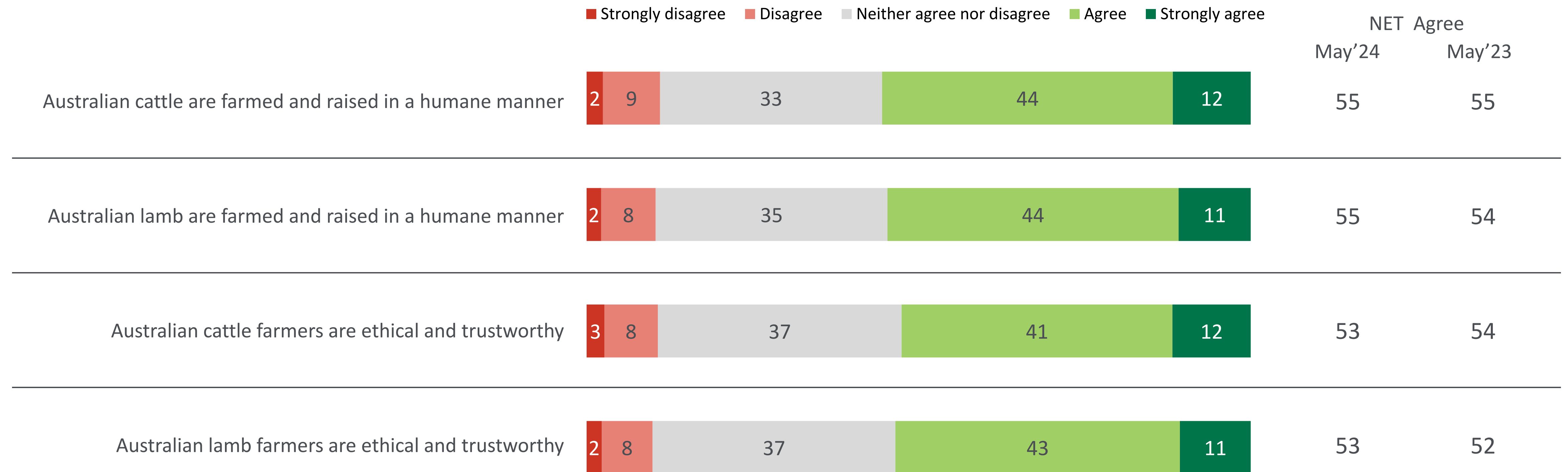
Attitudes towards beef/lamb industry (%)



B1. Please indicate how much you agree or disagree with the following statements. Base May'24 n=1501

Majority agree that cattle and sheep farmers are ethical and raise animals humanely – but many are still unsure – opportunity to engage with those who sit in on the fence

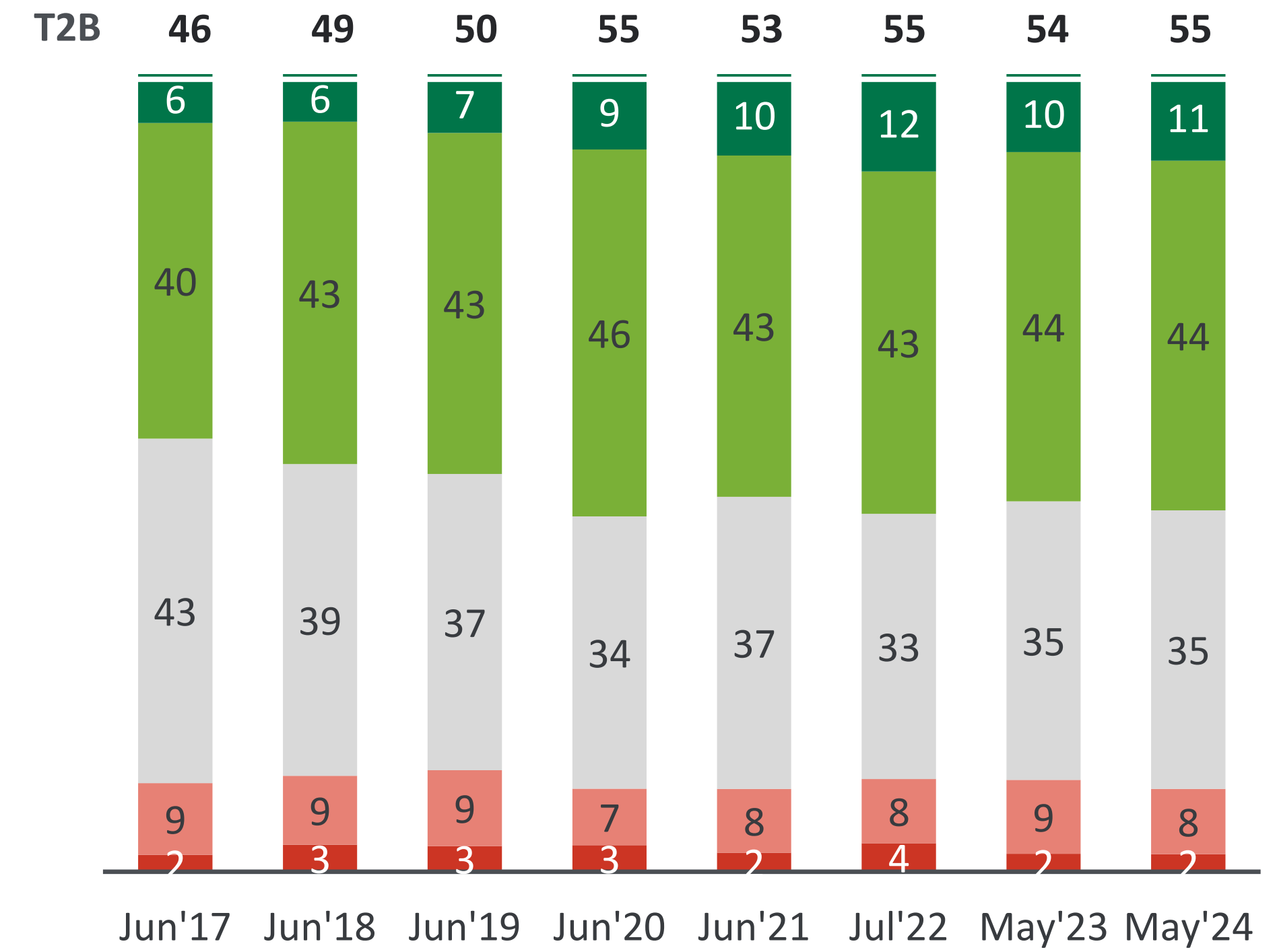
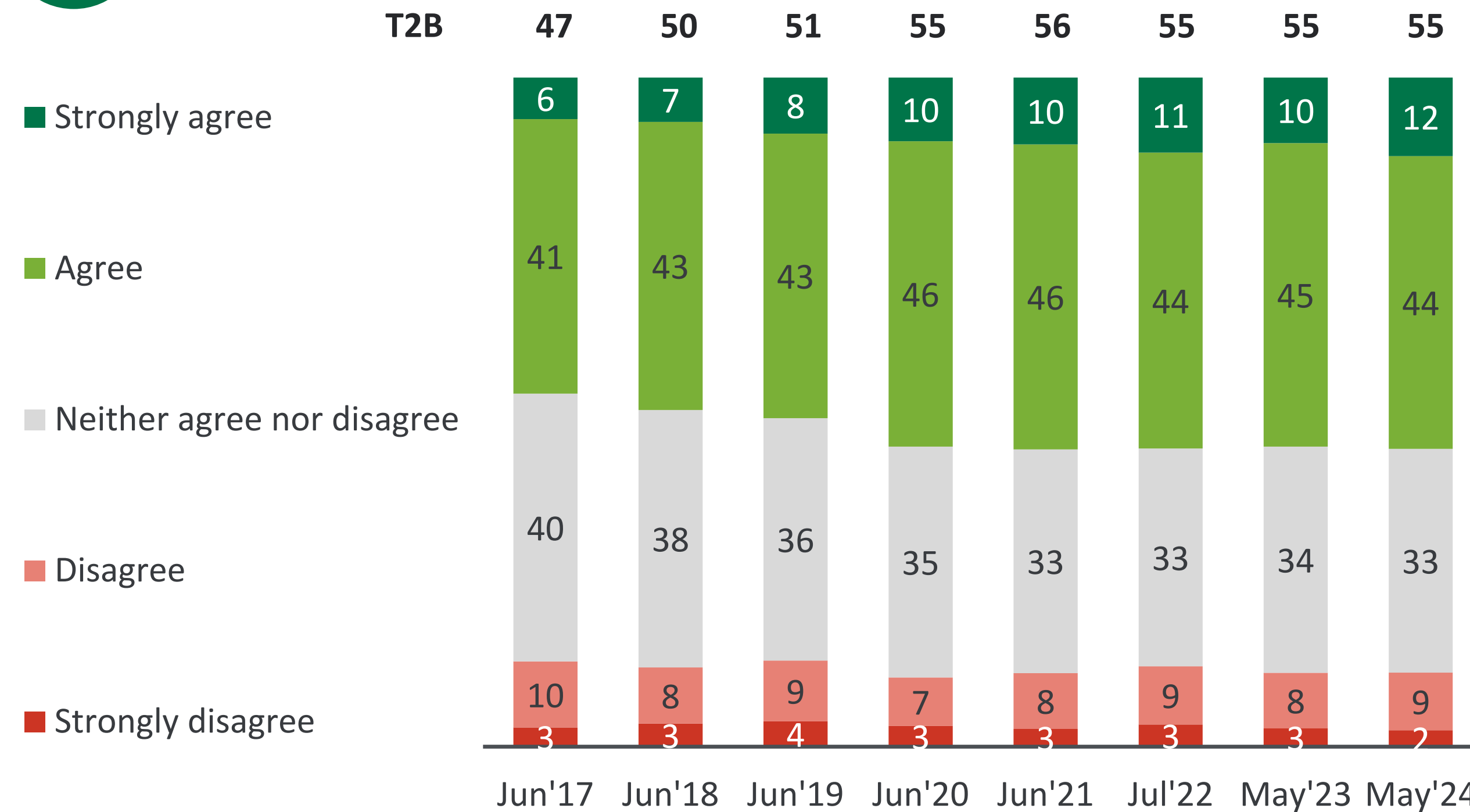
Attitudes towards cattle/lamb farmers (%)



↓ Significant decrease vs. May 23
 ↑ Significant increase vs. May 23

Perceptions around humane practices for cattle and sheep farming have remained mainly positive over the past few years

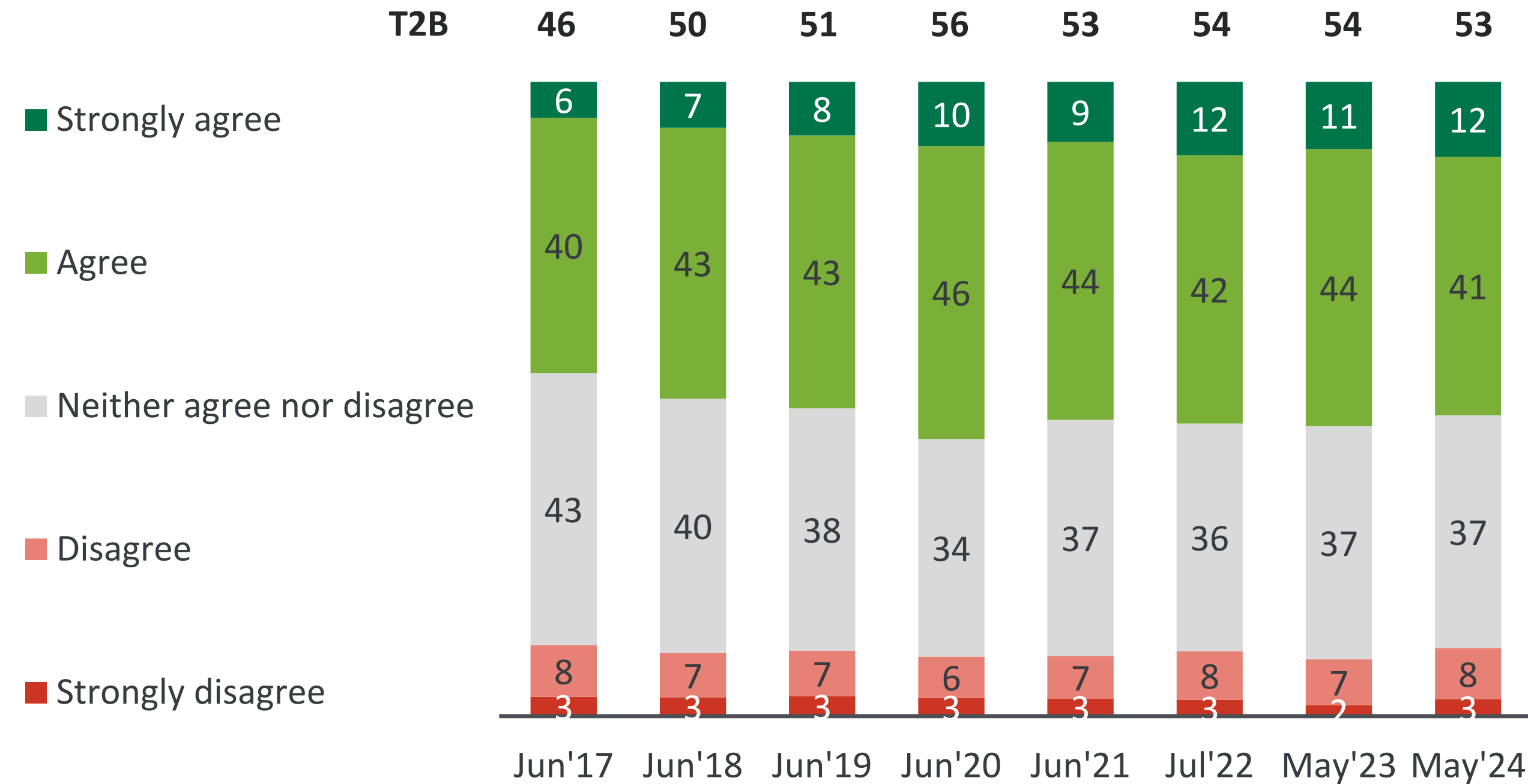
Australian cattle/lamb are farmed and raised in a humane manner (%)



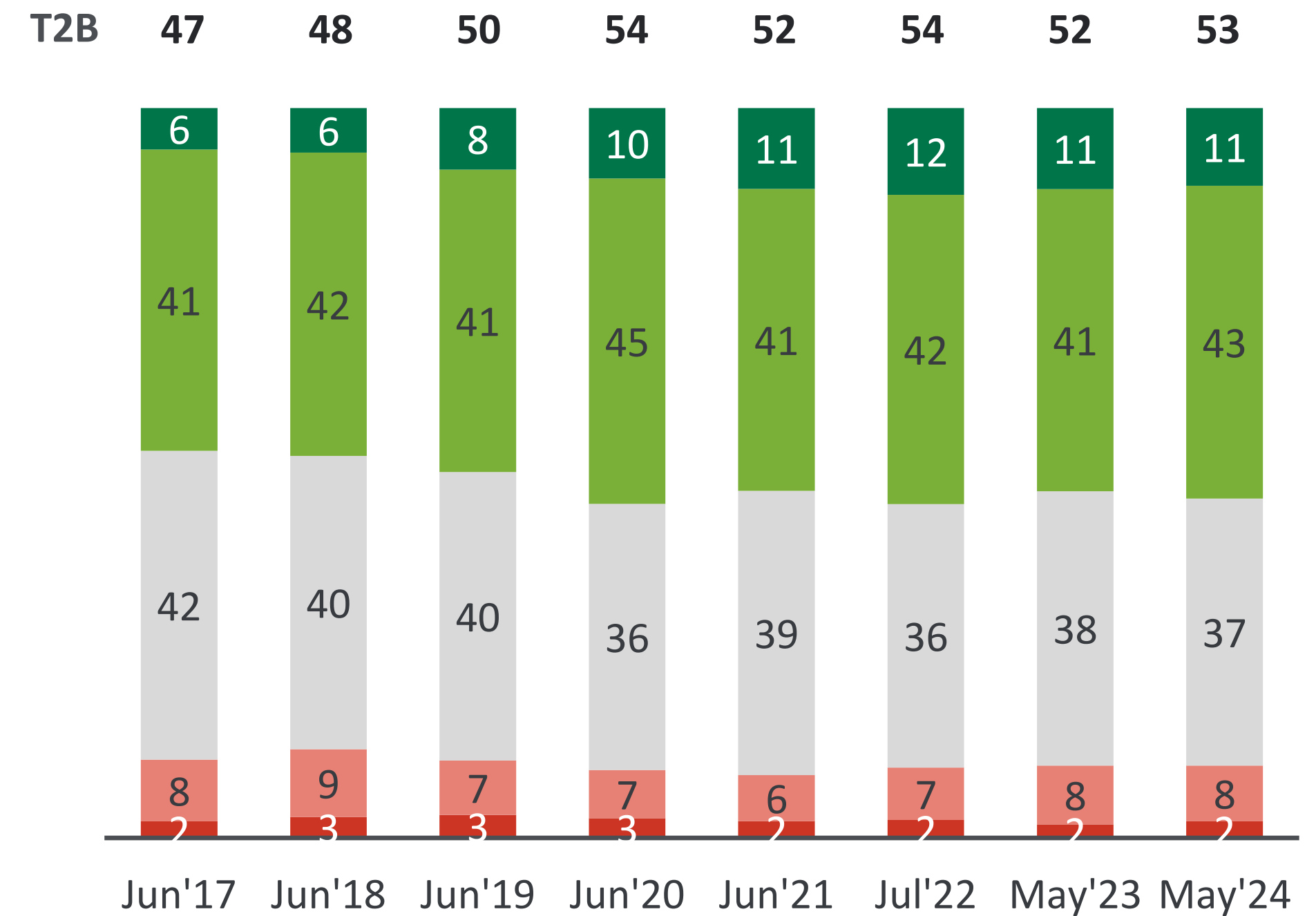
C4 Please indicate how much you agree or disagree with the following statements.
Base: Total sample n=1422-1556.

Perceptions around ethical and trustworthy production have remained mostly positive, with quite a few still not sure. Those with negative perceptions have remained low and stable over past few years.

Australian cattle/lamb farmers are ethical and trustworthy (%)



↓ Significant decrease vs. May 23 ↑ Significant increase vs. May 23



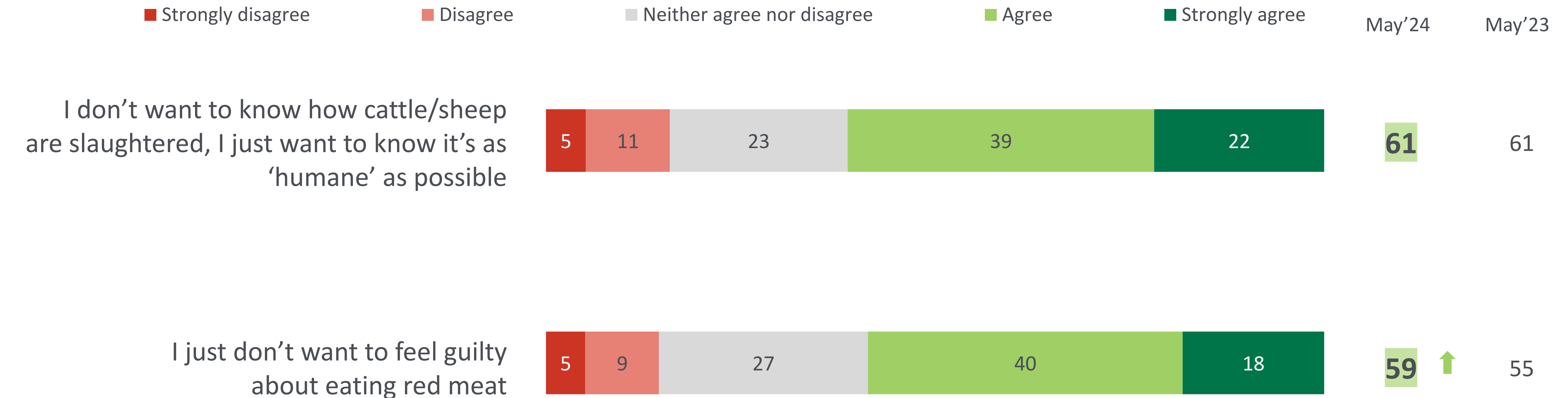
C4 Please indicate how much you agree or disagree with the following statements.
Base: Total sample n=1422-1556.



**Guilt – are
Australians
feeling guilty?**

People want assurance that cattle and sheep are slaughtered humanely – majority just don't want to feel guilty so they can feel that they can continue to enjoy eating red meat.

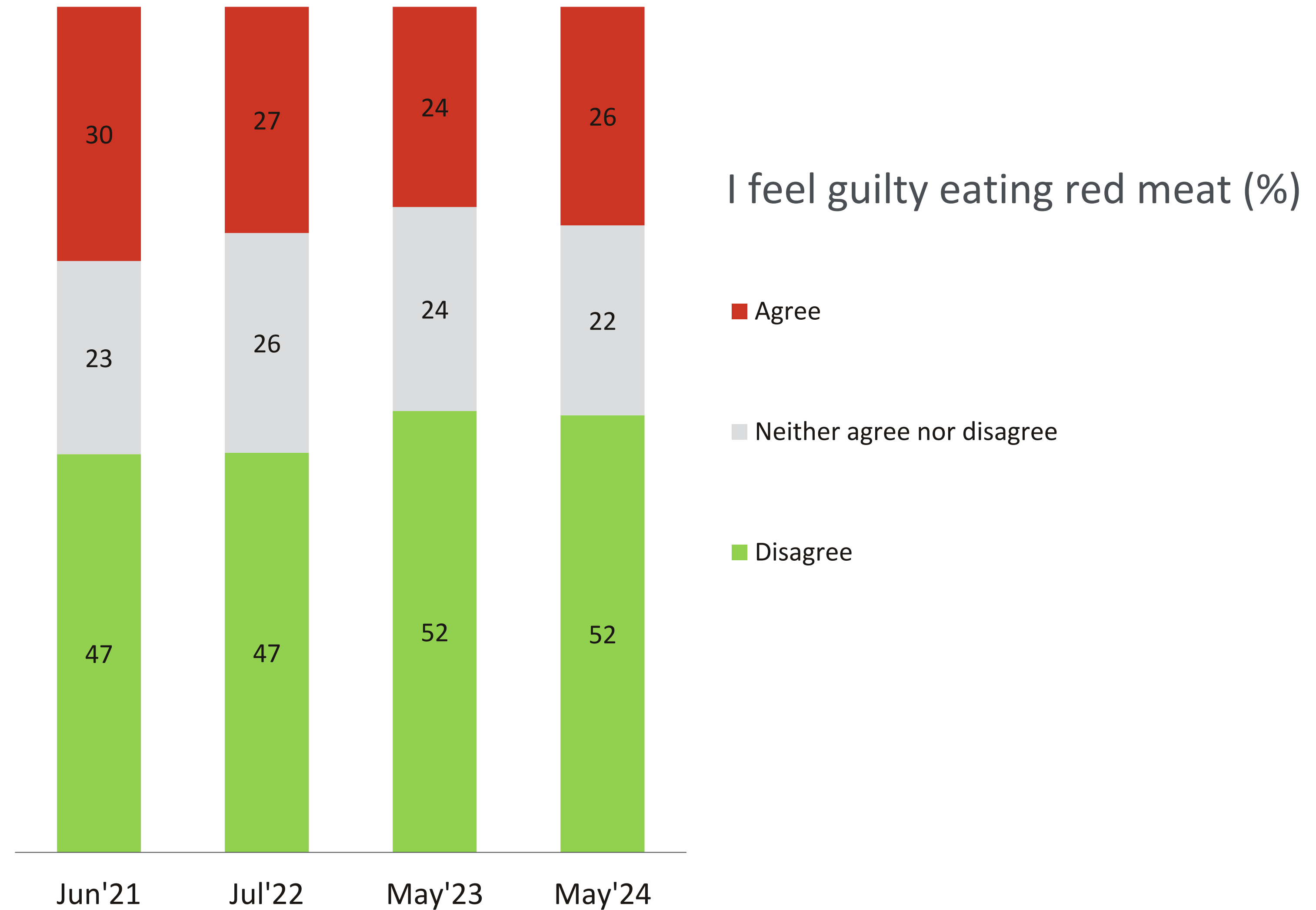
Attitudes towards cattle/lamb farmers (%)



↓ Significant decrease vs. May 23 ↑ Significant increase vs. May 23

X13 When it comes to red meat, how strongly do you agree or disagree with the following statements? Base May 2024 n=1501

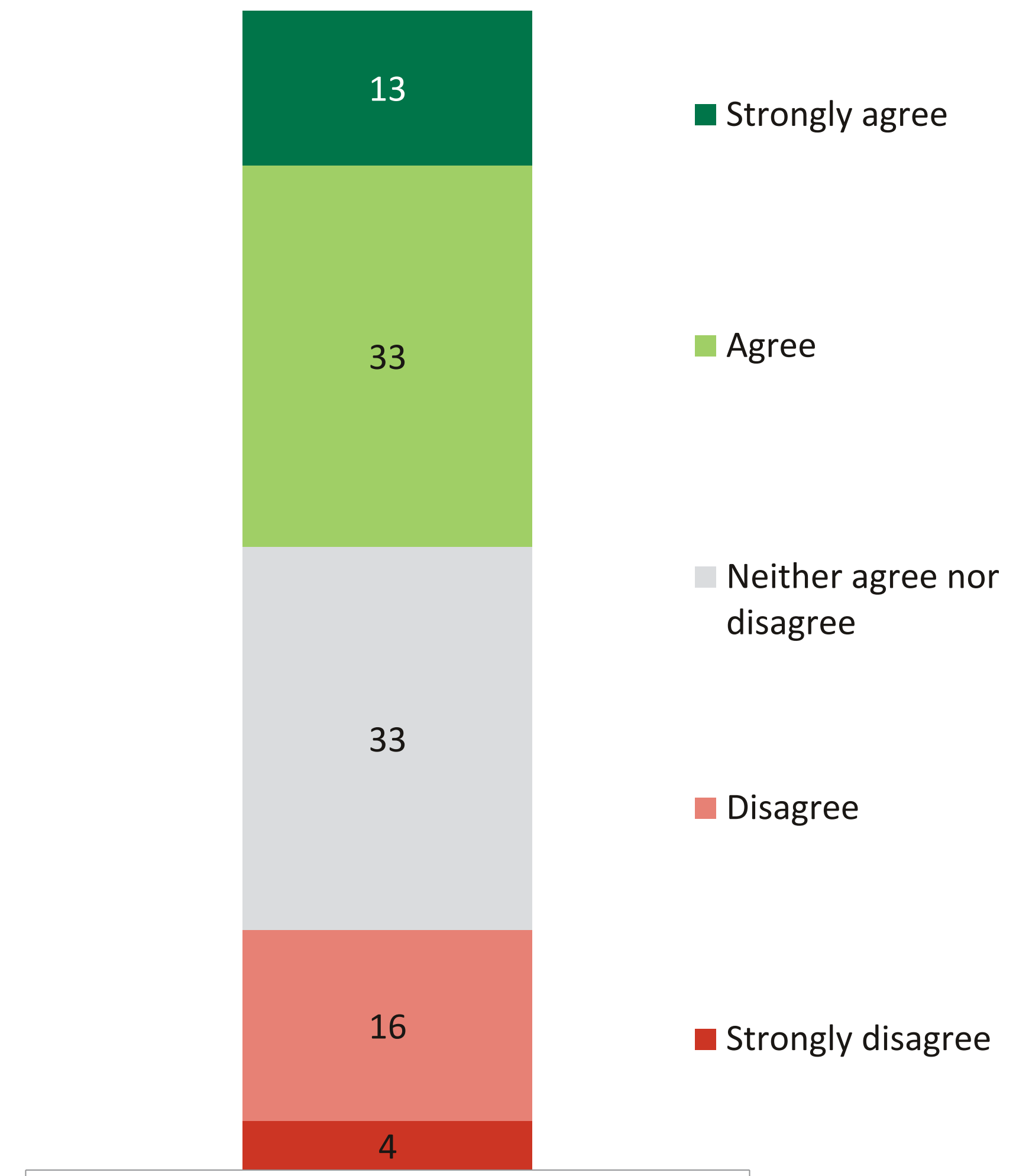
Majority do NOT feel guilty about eating red meat, with approx one quarter feeling some level of guilt.



↓ Significant decrease vs. May 23
 ↑ Significant increase vs. May 23

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

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

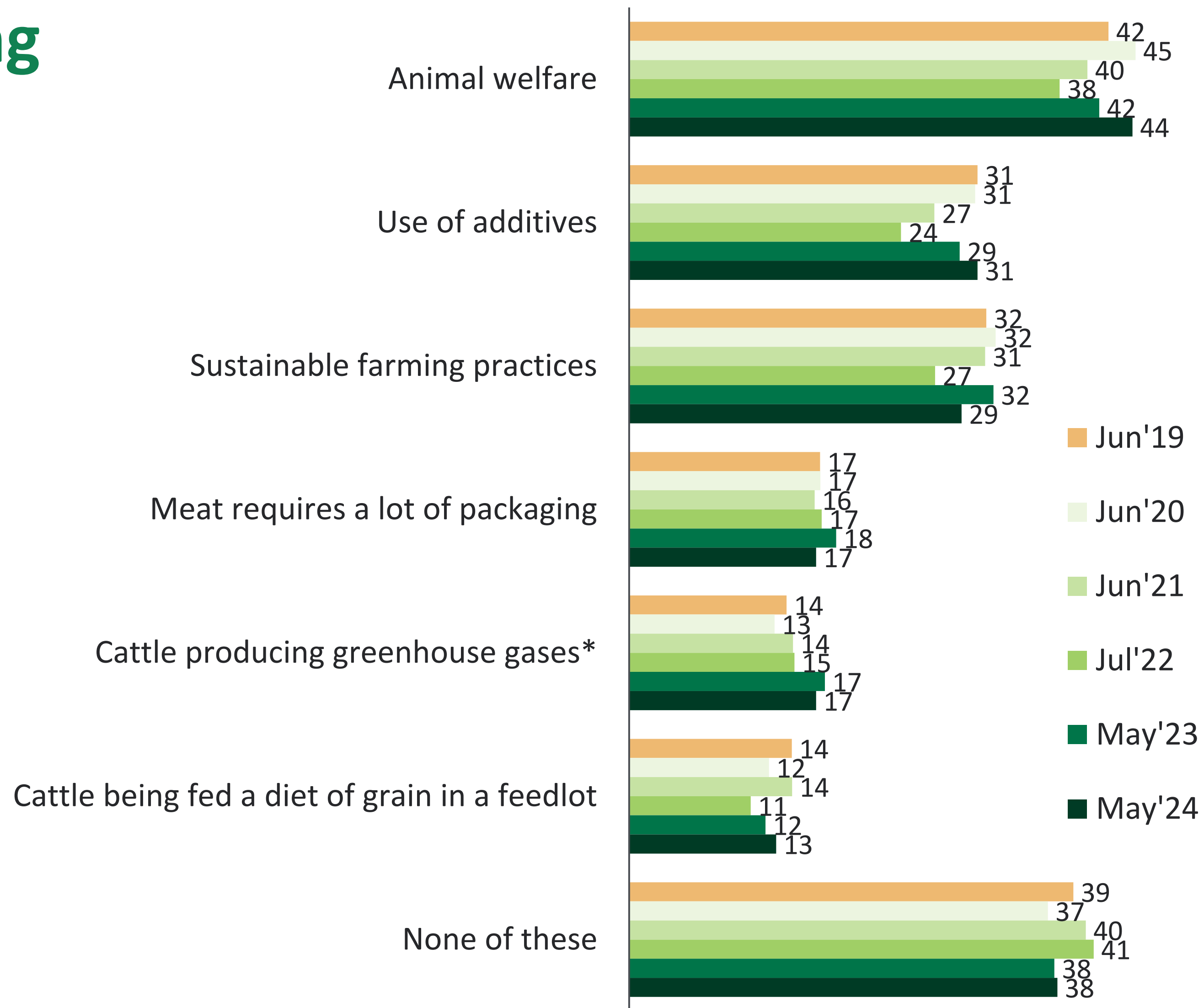


18% lamb
production



When people are thinking about beef production, animal welfare remains top of mind

Top of mind beef topics in the past month (%)
Among meat eaters

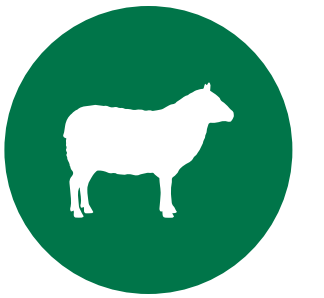
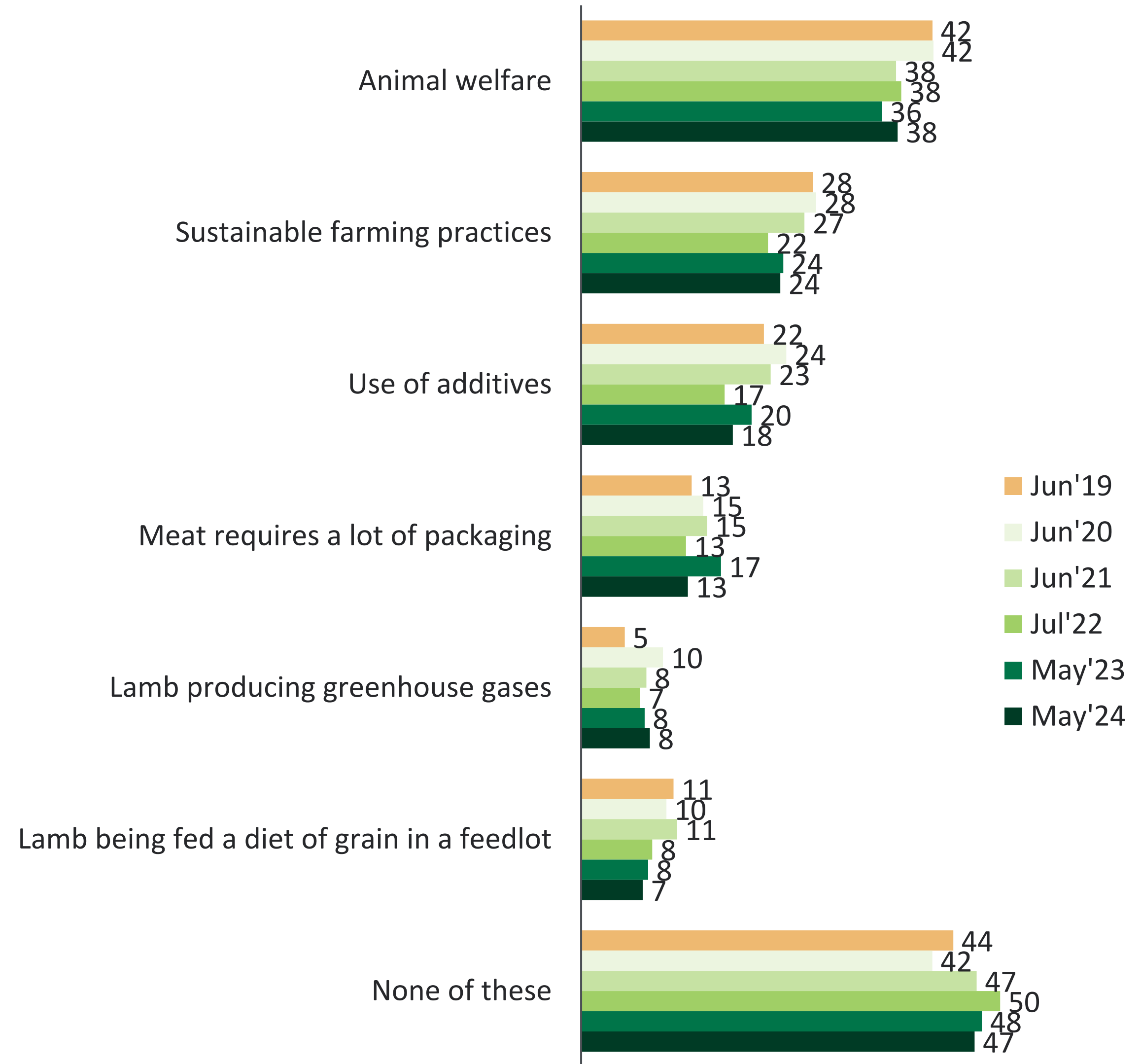


↓ Significant decrease vs. May 23 ↑ Significant increase vs. May 23

A5. Which of the following things have you thought about in the last month, in relation to the production of... Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb)
Base n=1288-1434.... Beef n=699-709; Lamb n=695-706. NOTE: Sample split in 2022; only asked about one industry

And similarly when people are thinking about lamb production, animal welfare remains top of mind

Top of mind lamb topics in the past month (%) - Among meat eaters

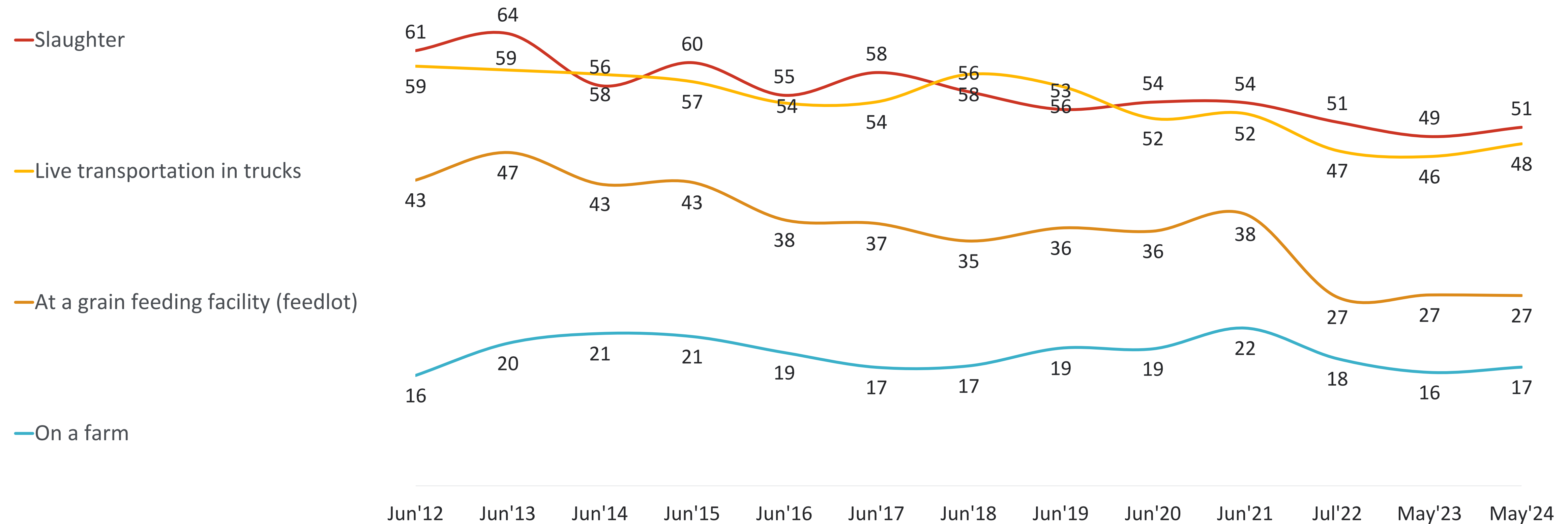


A5. Which of the following things have you thought about in the last month, in relation to the production of... Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb) Base n=1288-1434.... Beef n=699-703; Lamb n=695-706. NOTE: Sample split in 2022; only asked about one industry

Concerns about beef production are largely stable – general downward trend in level of concerns



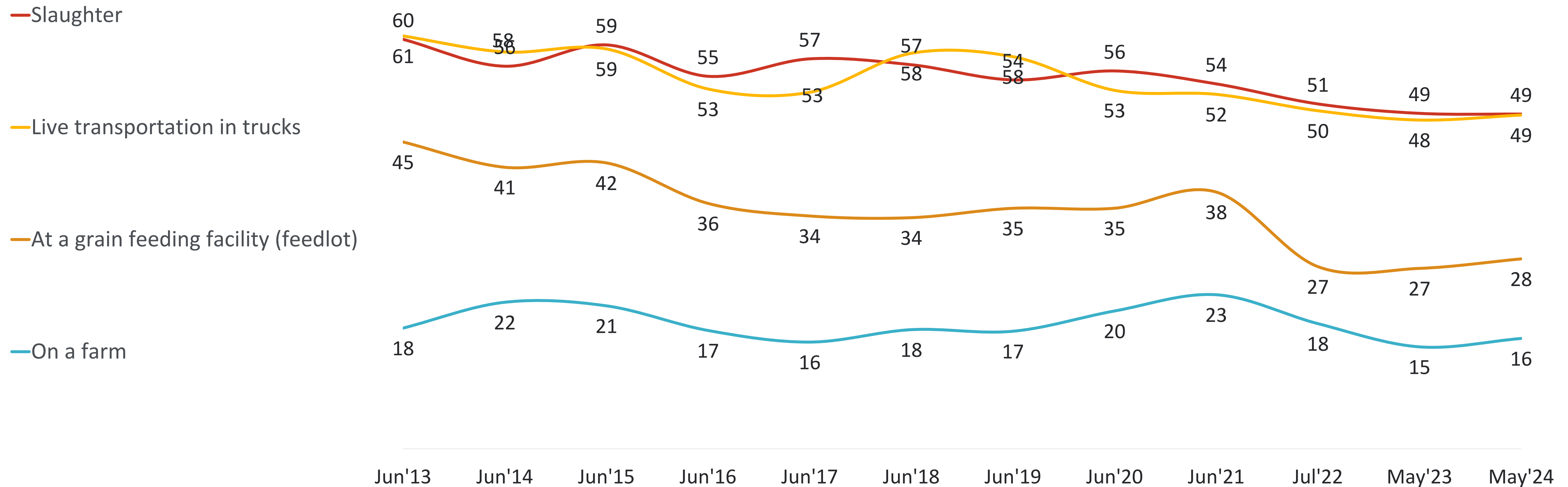
Concern of beef production stages (extremely/very concerned %) – Among meat eaters



Concerns about lamb production are largely stable – general decline in level of concern over time



Concern of lamb production stages (extremely/very concerned %) – Among meat eaters



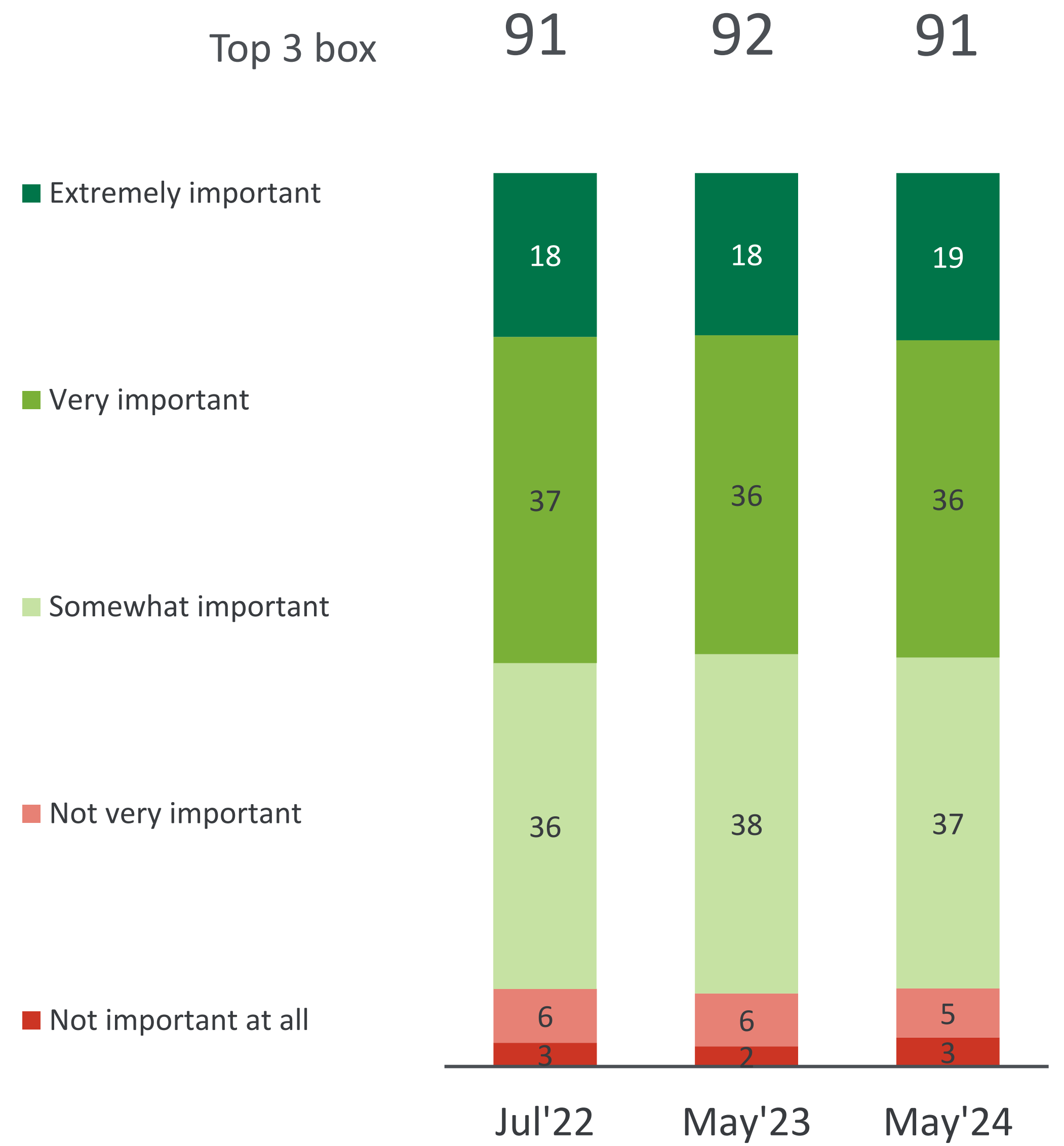
C5B Please indicate how concerned you are about the following stages of lamb production. Base: Meat eaters n=1288-1434.



Sustainability

Sustainability is highly important to Australians

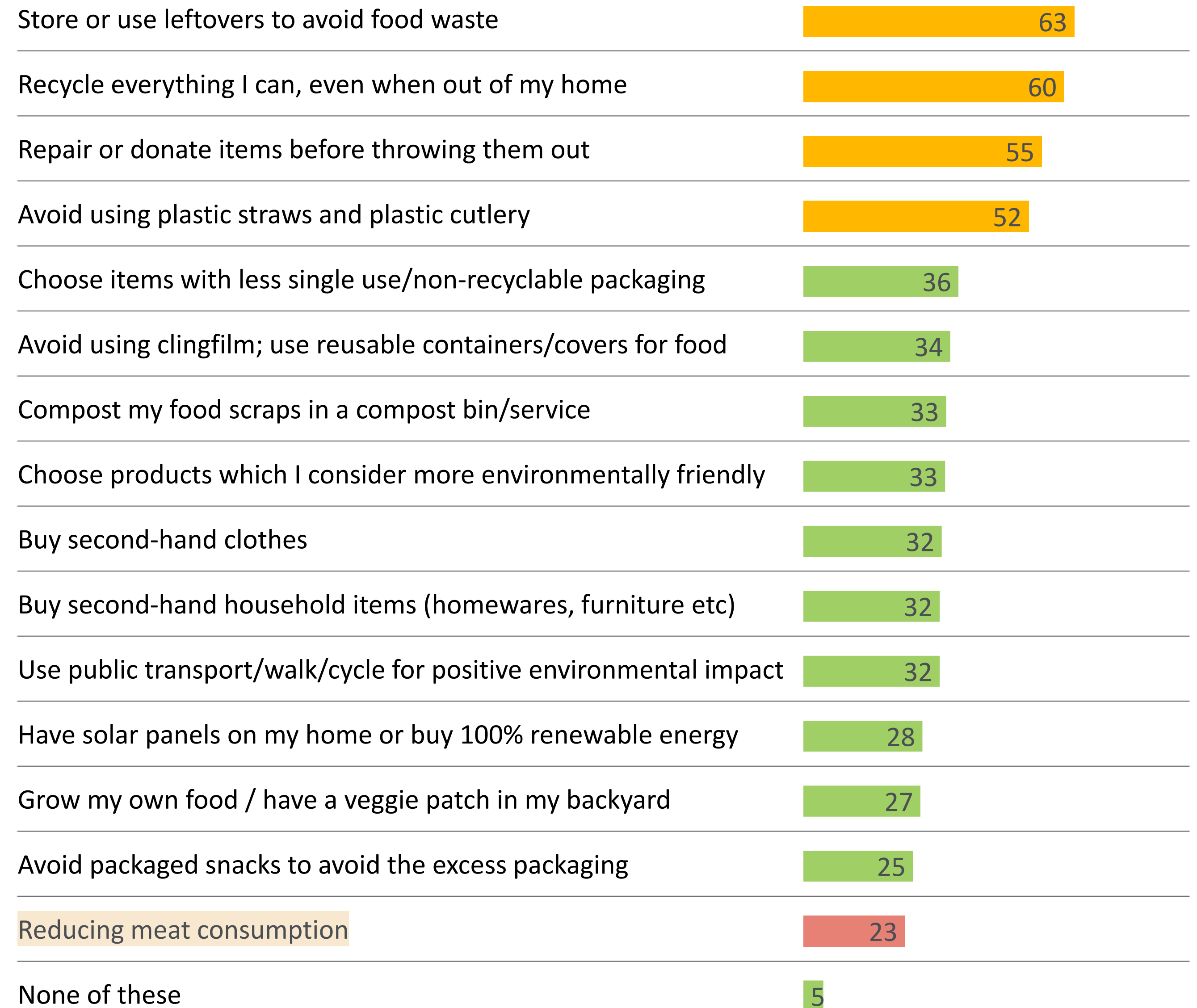
Importance of sustainability to you (%)



Actions taken to live a sustainable life:

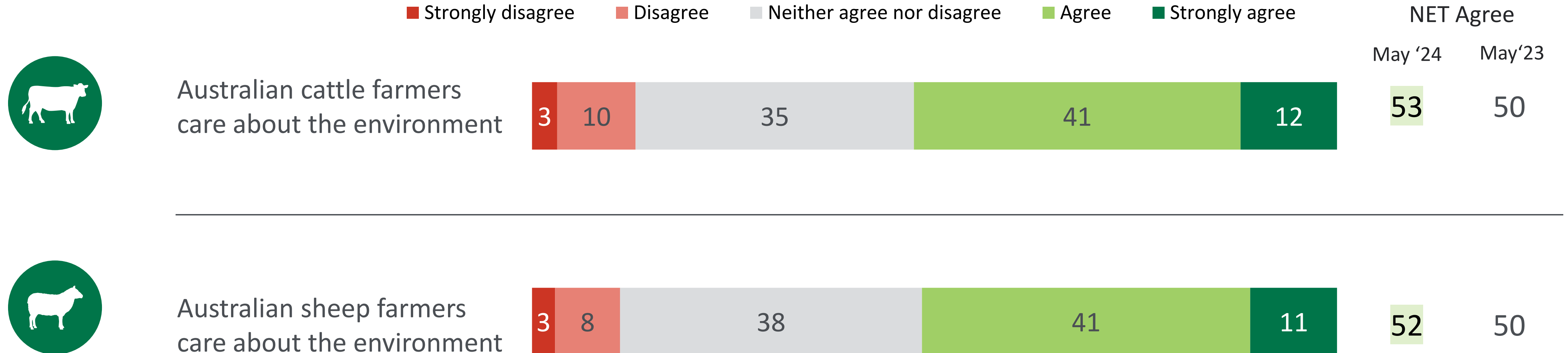
Minimising food waste, recycling, reducing landfill and avoiding plastic are the main activities undertaken

Sustainable actions you do (%)



Majority agree that farmers care about the environment, increase on previous year, but many are still unsure / unaware

Attitudes towards beef/lamb industry (%)



B1 Please indicate how much you agree or disagree with the following statements. Base May'24 n=1501

2 in 5 are unsure if the industry is doing all it can for the environment, suggesting a lack of knowledge / awareness

Attitudes towards beef/lamb industry (%)

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

NET Agree
May '24 May'23



Australian beef is environmentally friendly and sustainable



44 41

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



40 40



Australian lamb is environmentally friendly and sustainable



44 41

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

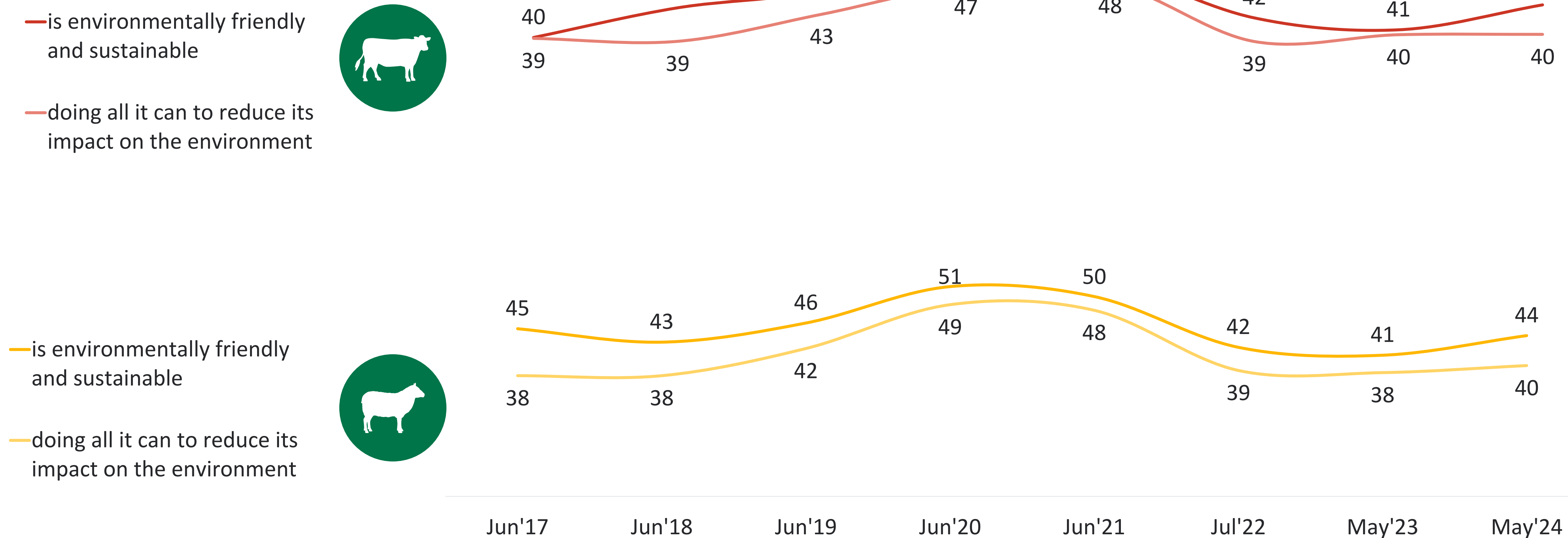


40 38

↓ Significant decrease vs. May 23
 ↑ Significant increase vs. May 23

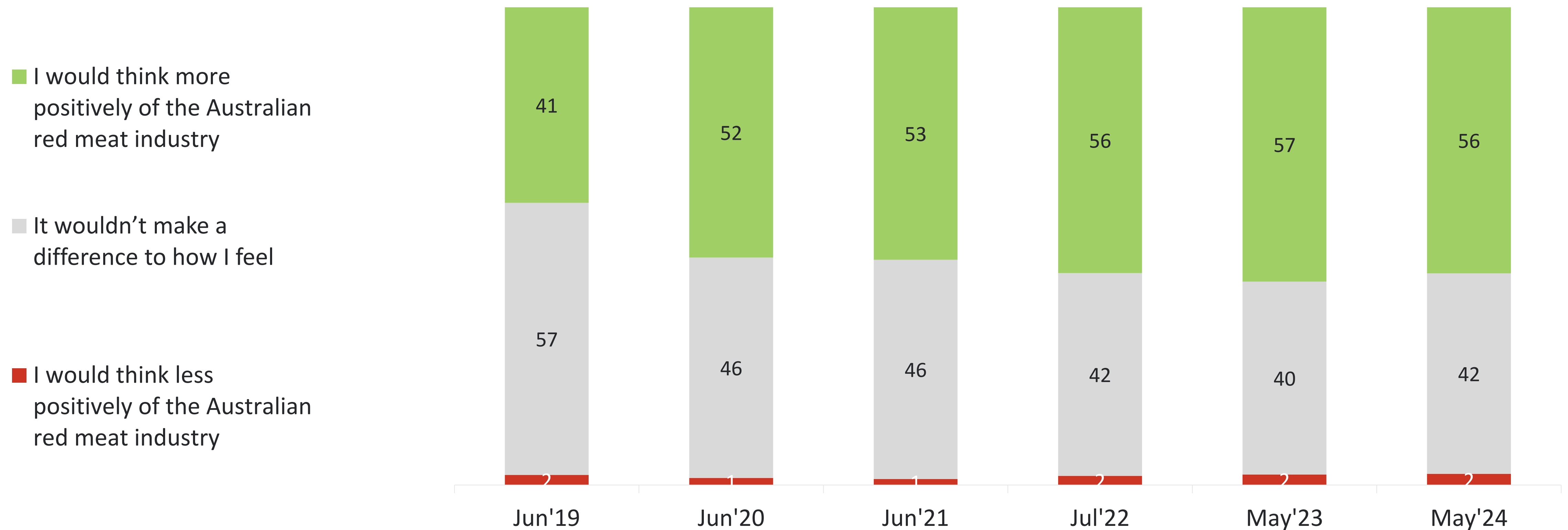
Perceptions around industry environmental sustainability are relatively stable, having improved a little over the past couple of years

Attitudes towards sustainability (T2B %)



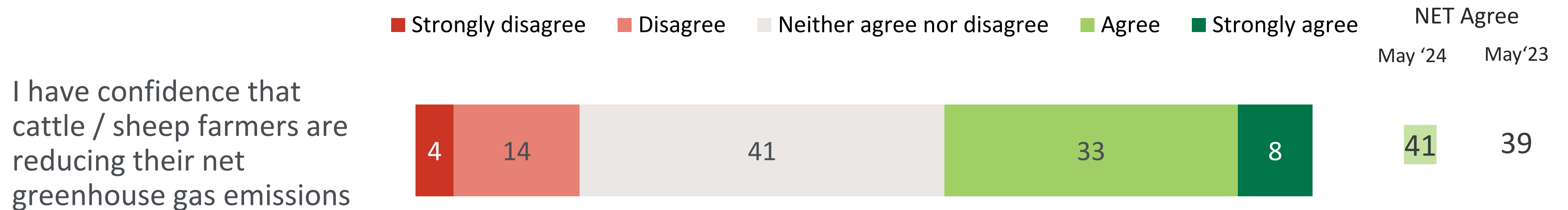
CN30 initiative has a positive impact on community's perceptions of the red meat industry

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



But the % of those who have confidence that farmer are reducing net greenhouse gas emissions is the same as those who are unaware or unsure of industry actions

Attitudes towards red meat industry (%)



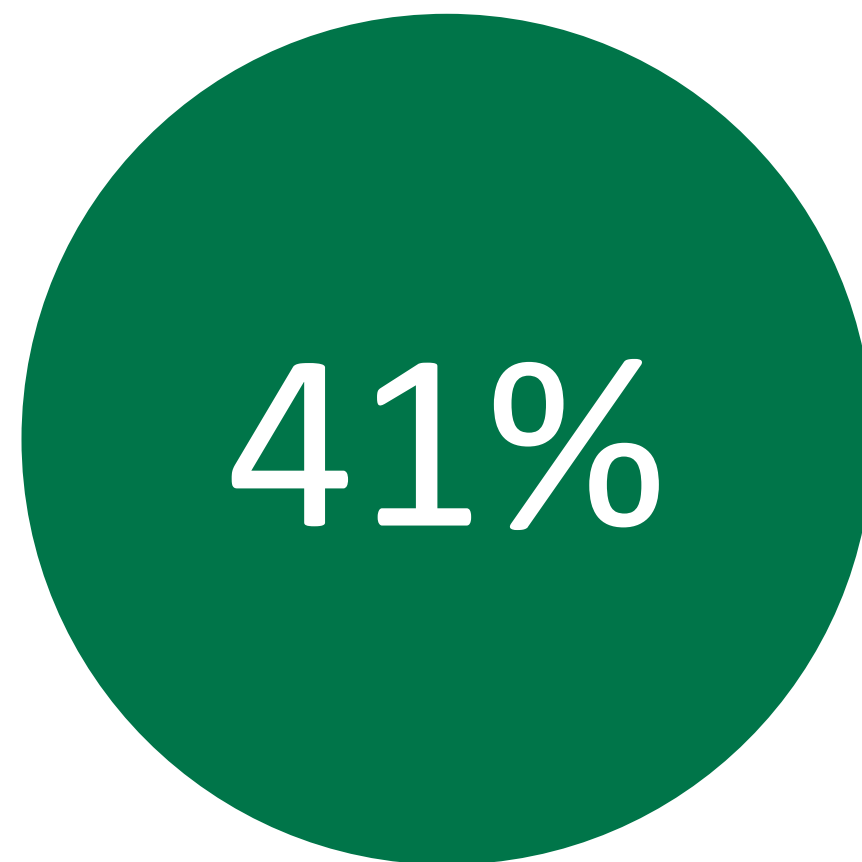


Community's knowledge of the Industry

Less than 2 in 5 Australians have visited a farm, indicating a relatively low level of connection between farmers & community

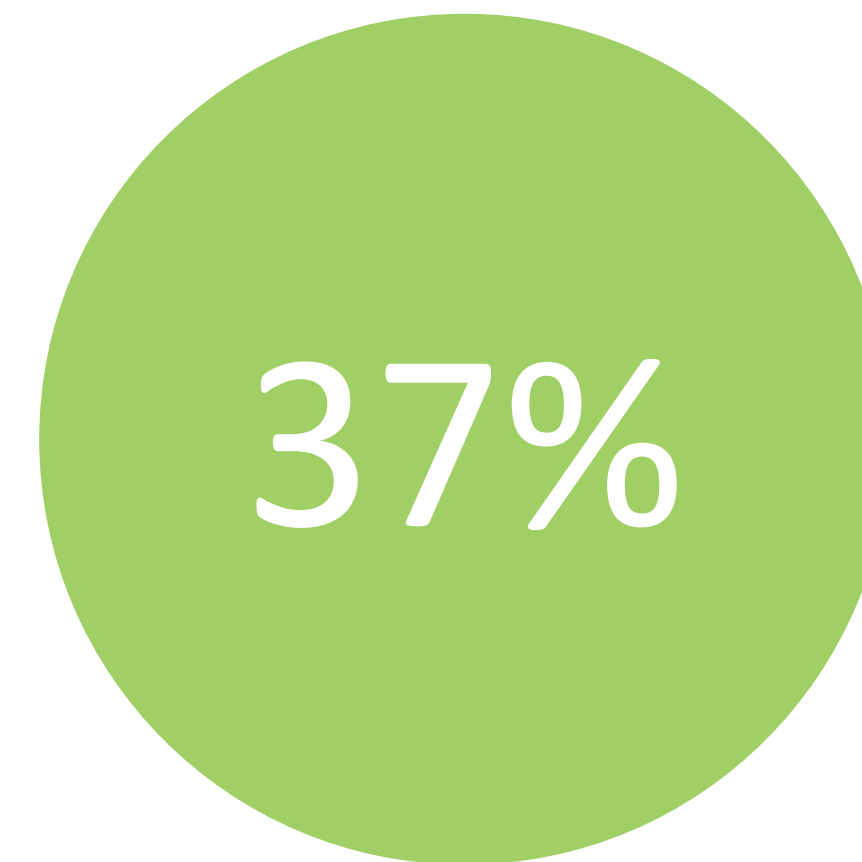
Visitation to cattle or sheep farm (%) – meat eaters

2 in 5 people are interested in visiting a farm



Interested in visiting a sheep/cattle farm

Visitation is stable with almost 2 in 5 metro Australians having visited a farm in the past



Have visited a sheep/cattle farm



**The average Aussie
doesn't really know
much about the red
meat industry**

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



30%

(almost 1 in 3)

think they have
knowledge of the
industry

53%

(or 1 in 2)

want to learn more
about our industry



73%

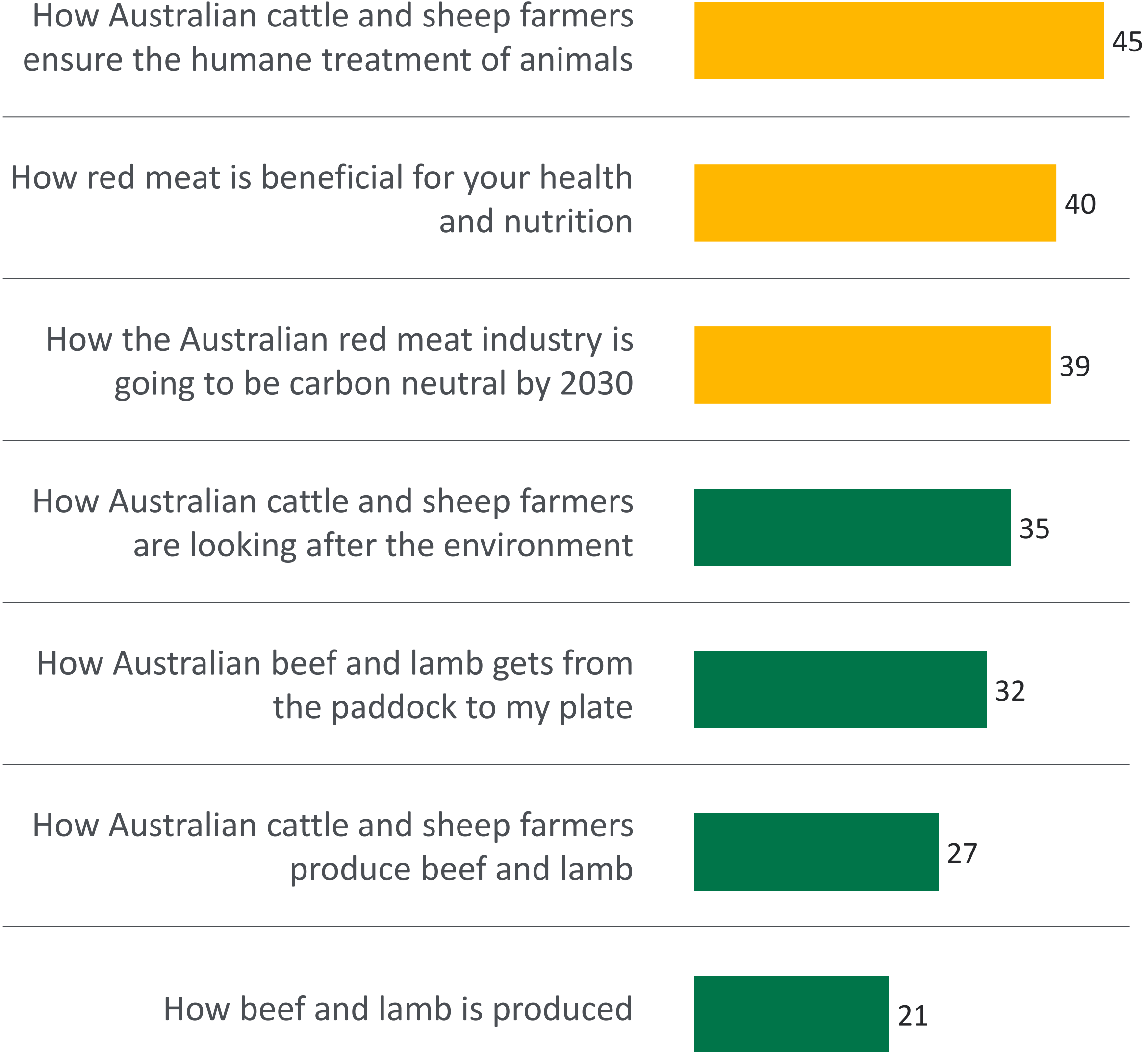
(almost 7 in 10)

think kids should be
learning about the
industry in schools



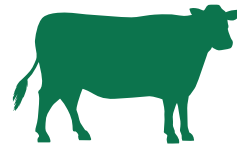




The community are most interested in learning more about animal welfare, nutrition benefits, carbon neutrality and environment initiatives

Interested in learning more about (%)



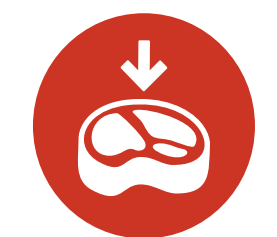
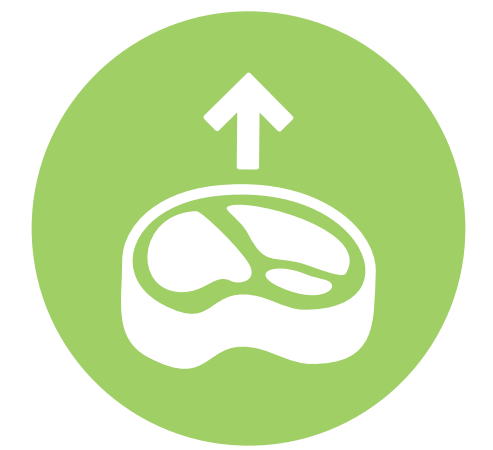
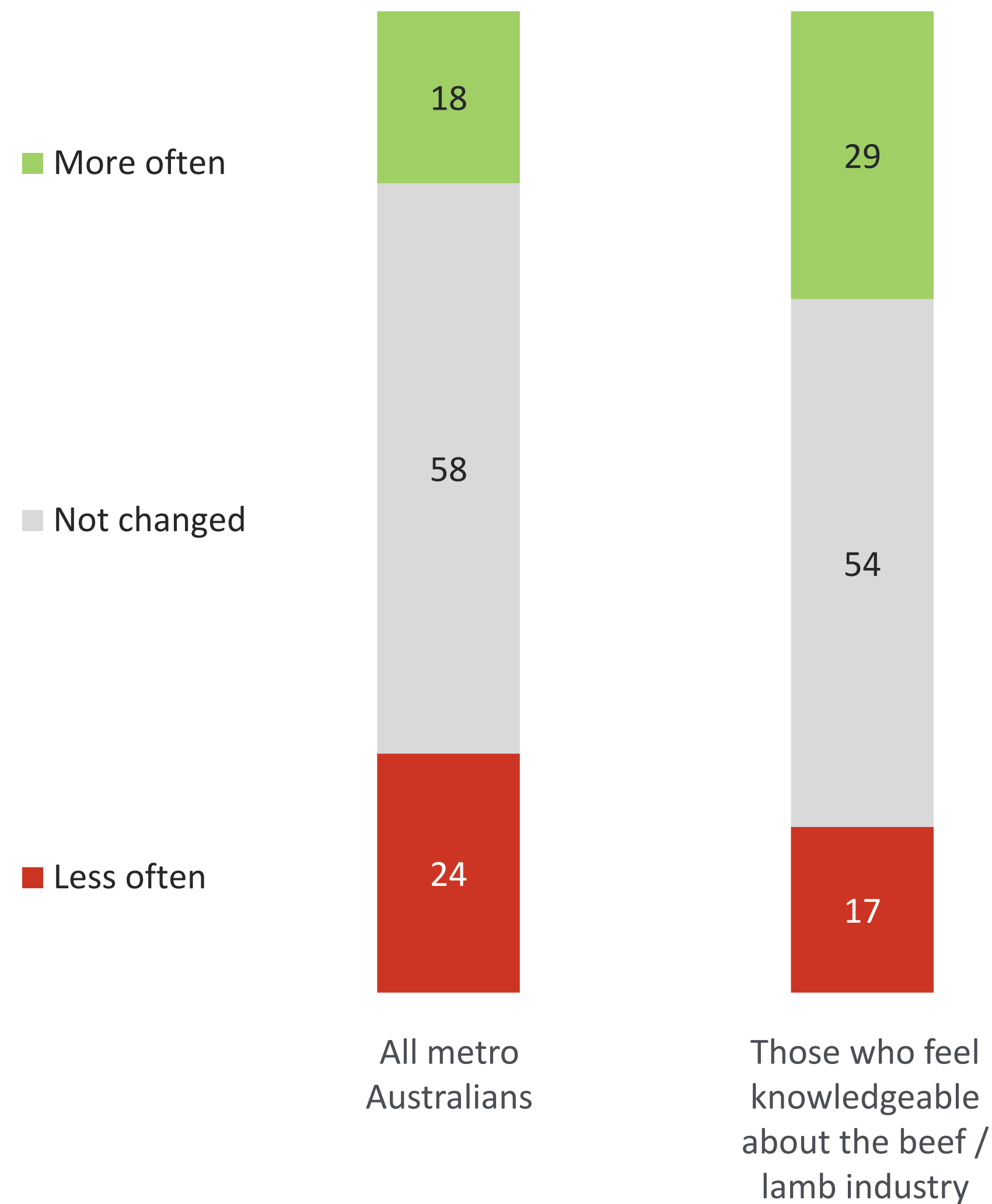
Higher levels of industry knowledge is linked to *better perceptions of the red meat industry*

% 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	58	74	+ 16
 Australian cattle producers care about the environment	53	68	+ 15
 Australian cattle are farmed and raised in a humane manner	55	72	+ 16
 Australian cattle producers make a positive contribution to society	63	74	+ 11
 Australian cattle producers are ethical and trustworthy	53	67	+ 15

Those who know more about the industry are also likely to be eating more red meat, and less likely to be reducing their 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 (%)



64%



64%



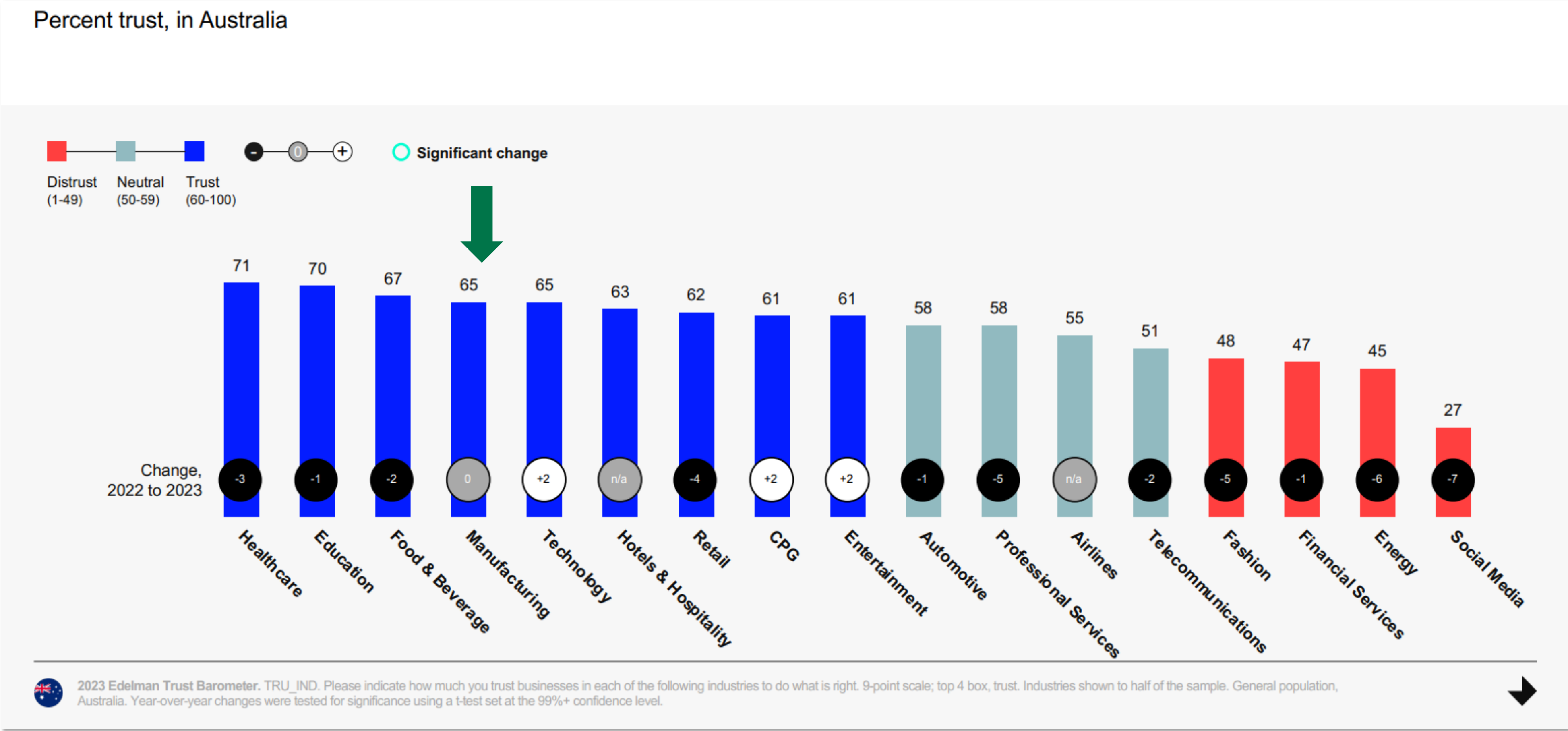
Trust in industries: Compared to other industry sectors, the red meat industry is in the top quartile of 'trusted' industries in Australia



64%
Australian beef
industry

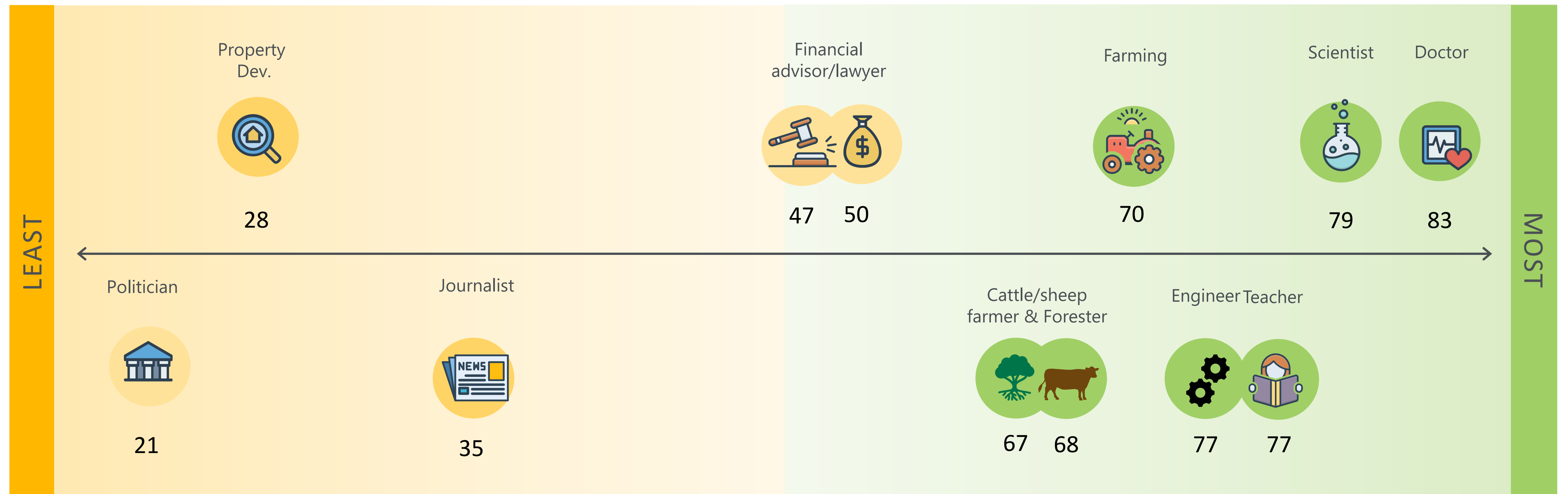


64%
Australian lamb
industry



Trust in professions: Cattle and sheep farmers are amongst the most trusted professions in Australia

of industry trust (T4B)

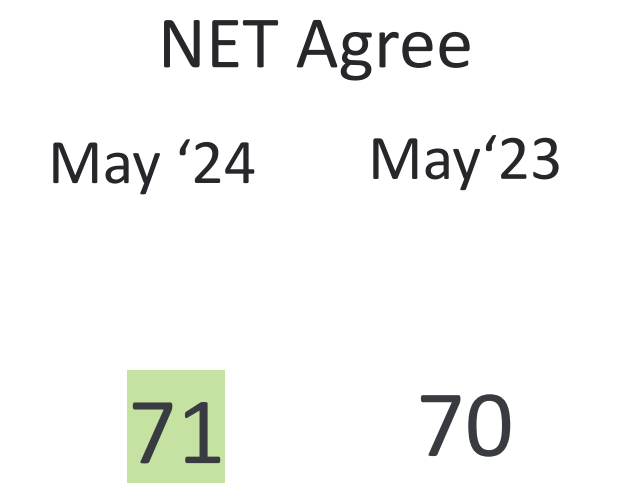


Strong levels of agreement that Australian red meat producers to provide safe, nutritious and sustainable food

Attitudes towards red meat (%)

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

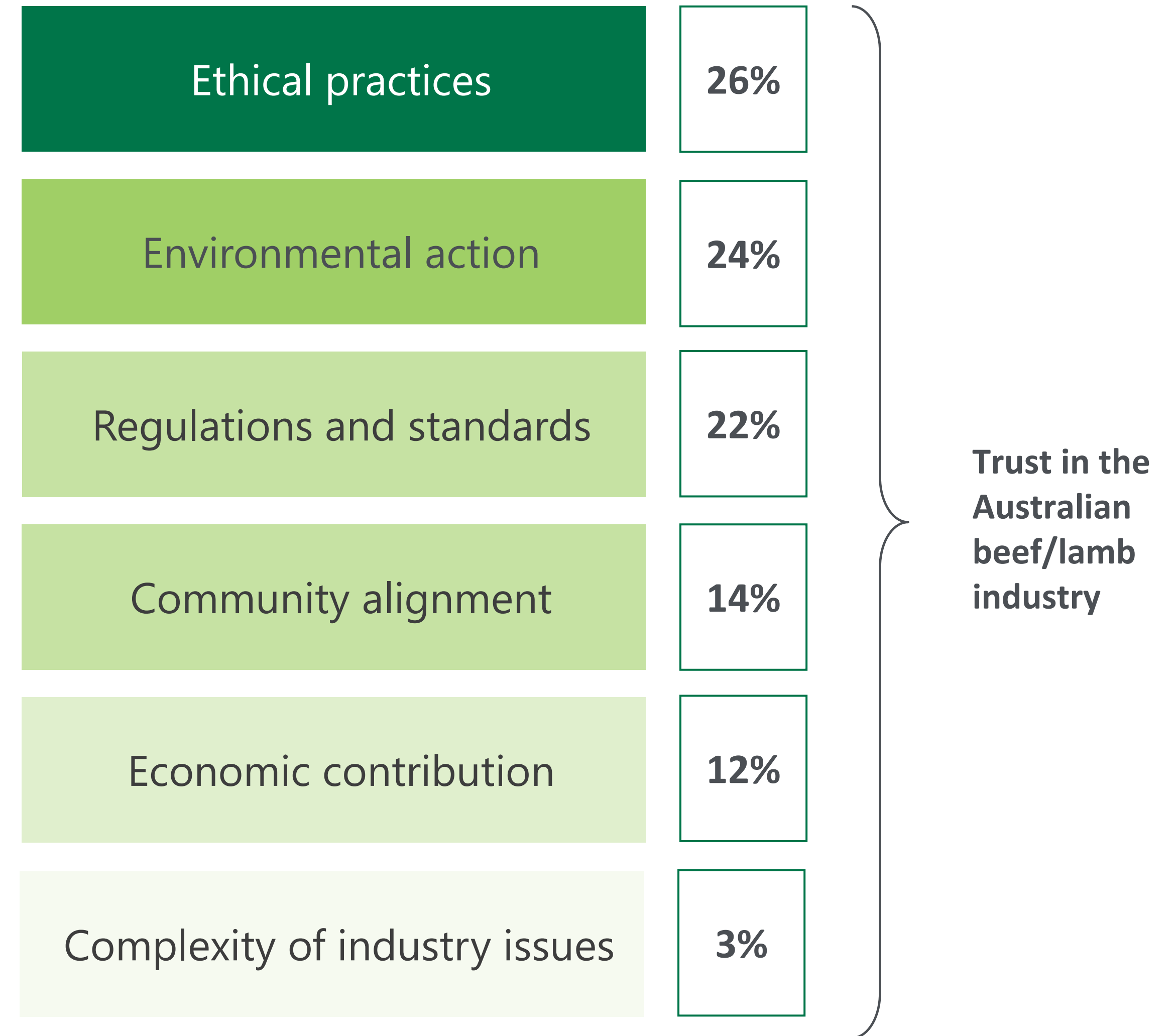
I have confidence in Australian beef and lamb producers to provide my family with safe, nutritious and sustainable food



The top drivers of trust in the Australian red meat industry are:

- ✓ ethical practices
- ✓ environmental action
- ✓ regulation

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.

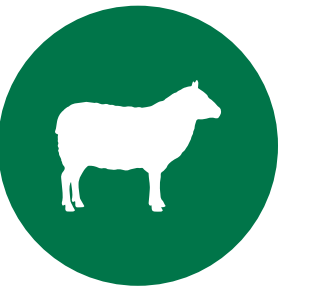
The specific technique used is **Shapley importance analysis**

Consistent perceptions of the beef industry across the key drivers of trust – most slightly improved



	Measure	Jun '22	May'23	May'24
Ethical practices	Australian cattle are farmed and raised in a humane manner	55	55	55
	Australian cattle farmers are ethical and trustworthy	54	54	53
Community alignment	The Australian beef industry is prepared to change their practices in response to community concerns	42	42	44
	The Australian beef industry listens to and respects community opinions	44	43	44
Environmental action	I have confidence that cattle/sheep farmers are reducing their net greenhouse gas emissions	41	39	41
	The Australian beef industry is doing all it can to reduce its impact on the environment	39	40	40
	Australian beef is environmentally friendly and sustainable	42	41	44
	Australian cattle farmers care about the environment	50	50	53
Economic contribution	Australian cattle farmers make a positive contribution to society	61	61	63
	The Australian beef industry generates significant local jobs in regional areas	69	72	74
Complexity of industry issues	The Australian beef industry is an important part of the Australian economy	75	77	79
	Animal welfare in the Australian beef industry is a complex issue	60	63	61
Regulations and standards	Environmental management in the Australian beef industry is a complex issue	61	64	64
	Current regulation of the Australian beef industry is effective	42	42	45
	Standards developed for the Australian beef industry ensure people in those industries do the right thing	60	58	59

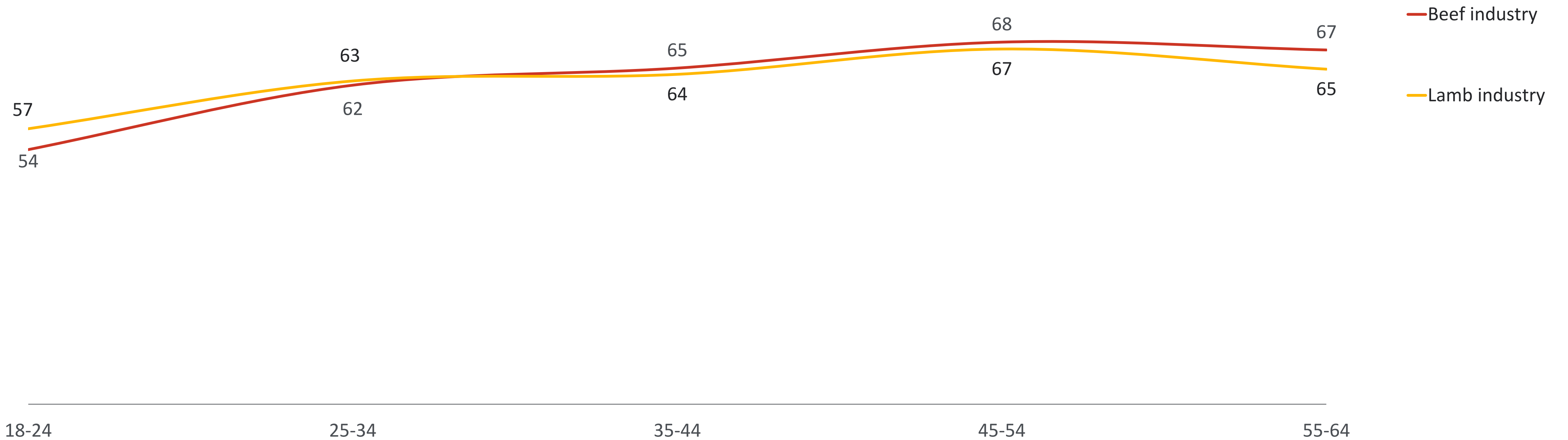
Similar story for lamb...



	Measure	Jun '22	May'23	May'24
Ethical practices	Australian sheep are farmed and raised in a humane manner	55	54	55
	Australian sheep farmers are ethical and trustworthy	54	52	53
Community alignment	The Australian lamb industry is prepared to change their practices in response to community concerns	41	41	40
	The Australian lamb industry listens to and respects community opinions	39	39	43
Environmental action	I have confidence that cattle / sheep farmers are reducing their net greenhouse gas emissions	41	39	41
	The Australian lamb industry is doing all it can to reduce its impact on the environment	39	38	40
	Australian lamb is environmentally friendly and sustainable	42	41	44
	Australian sheep farmers care about the environment	47	50	52
	Australian sheep farmers make a positive contribution to society	58	60	62
Economic contribution	The Australian lamb industry generates significant local jobs in regional areas	65	70	70
	The Australian lamb industry is an important part of the Australian economy	72	73	72
Complexity of industry issues	Animal welfare in the Australian lamb industry is a complex issue	56	60	56
	Environmental management in the Australian lamb industry is a complex issue	56	59	57
Regulations and standards	Current regulation of the Australian lamb industry is effective	40	38	42
	Standards developed for the Australian lamb industry ensure people in those industries do the right thing	54	57	57

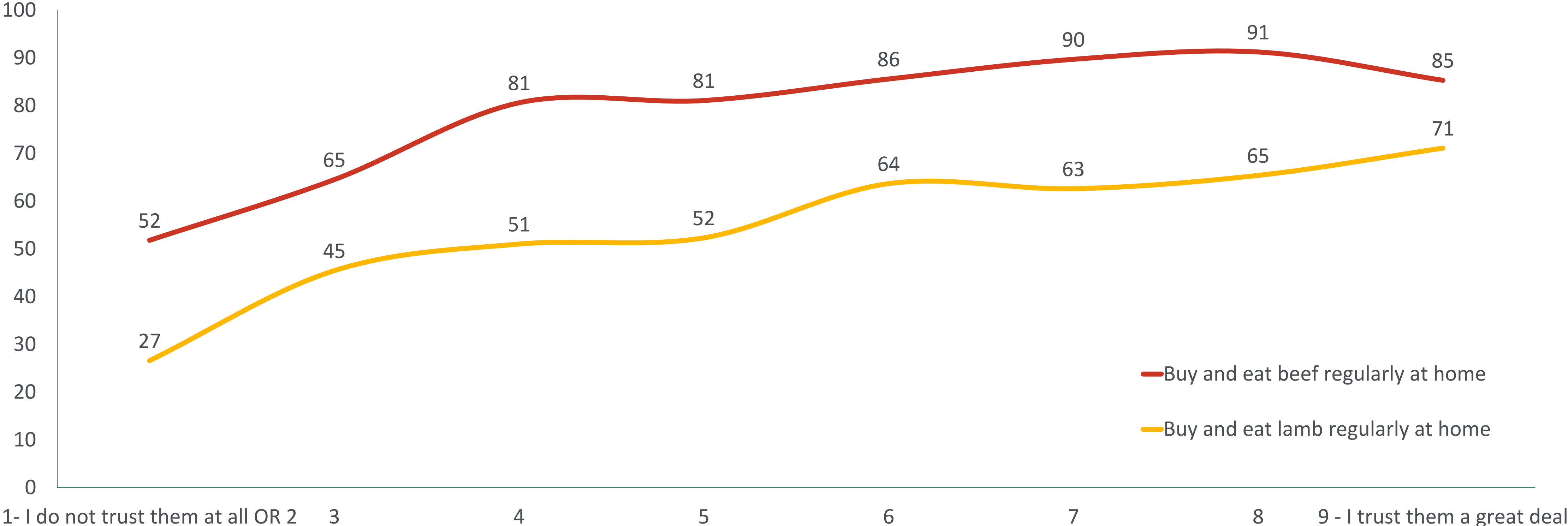
Mid to older generations have more trust in the red meat industry than the younger generation (Gen Z)

Trust in industry to do what is right by age (%)

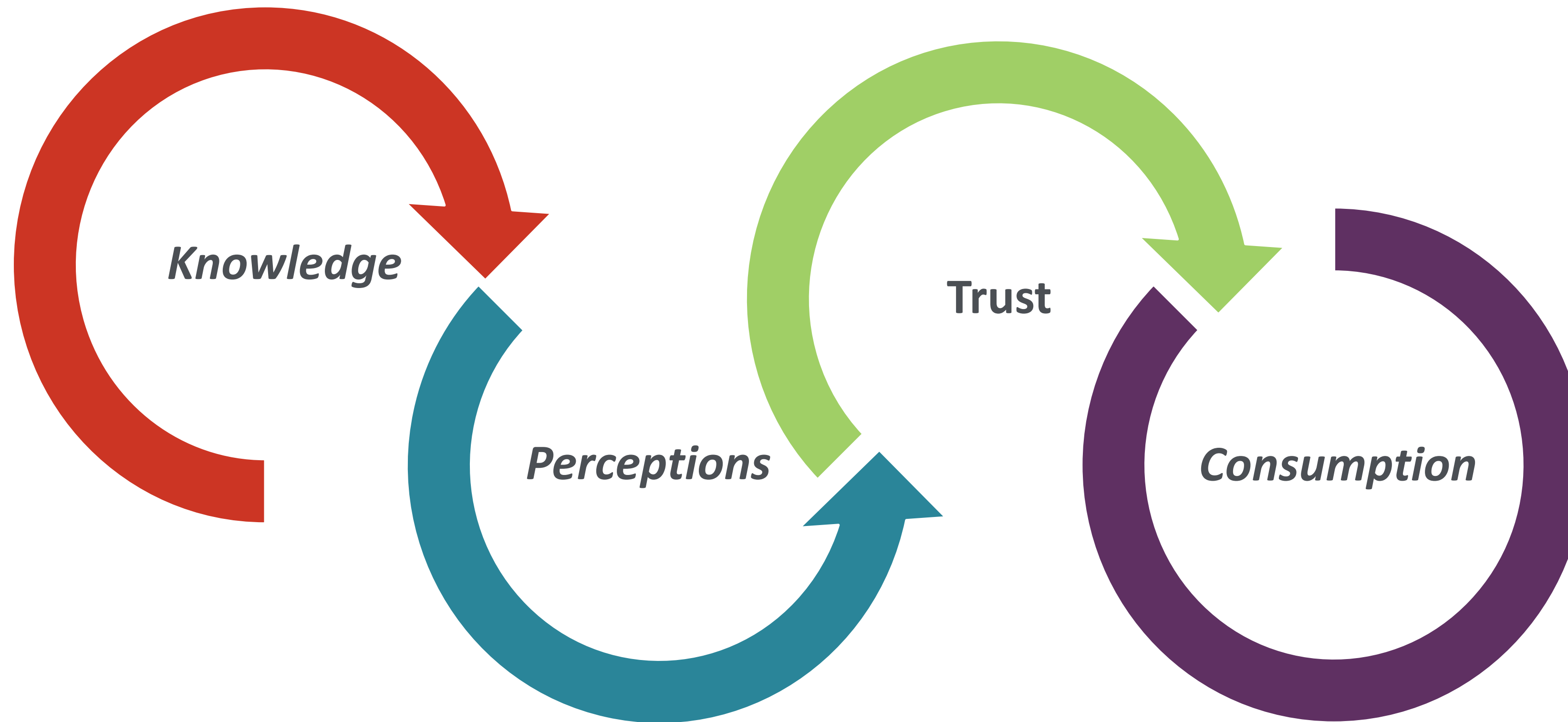


Higher trust in industry is correlated with higher, more regular consumption of red meat

Trust in industry to do what is right by meat bought and eaten regularly at home by (%)



There's a ***strong correlation*** between higher levels of knowledge, positive perceptions of the industry, higher trust levels and regular consumption of Australian red meat.

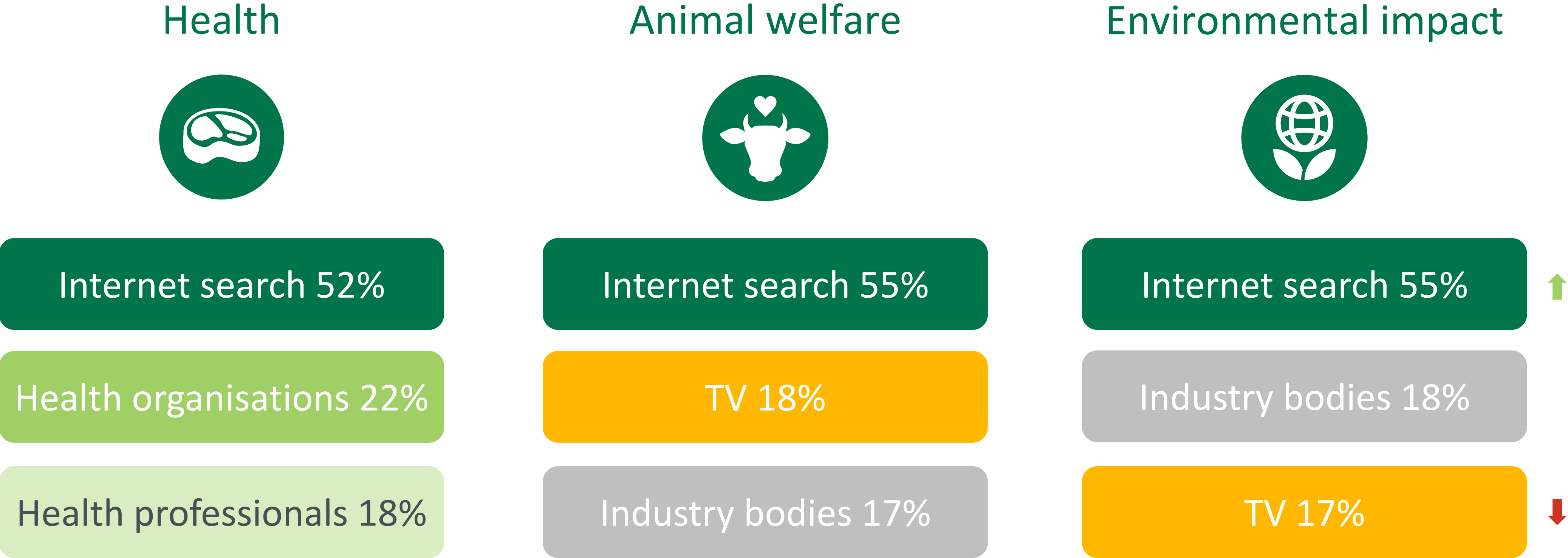




Information sources

Across health, animal welfare and environmental impact, internet search is by far the main channel used

Information sources – across topics (%)



↓ Significant decrease vs. May 23
 ↑ Significant increase vs. May 23

Community Sentiment Scorecard: 2024

	2018	2019	2020	2021	2022	2023	2024
Consumption – Among meat eaters							
Red meat consumption has increased vs 12 months ago	10	8	10	9	15	15	18 ↑
Red meat consumption is unchanged vs 12 months ago	62	63	62	63	56	57	58 ↑
Red meat consumption is reduced vs 12 months ago	28	29	28	28	29	28	24 ↓
Reasons for reducing consumption – Among red meat reducers							
Environment	6	10	15	20	15	5	6 ↑
Animal welfare	10	7	12	13	6	4	3 ↓

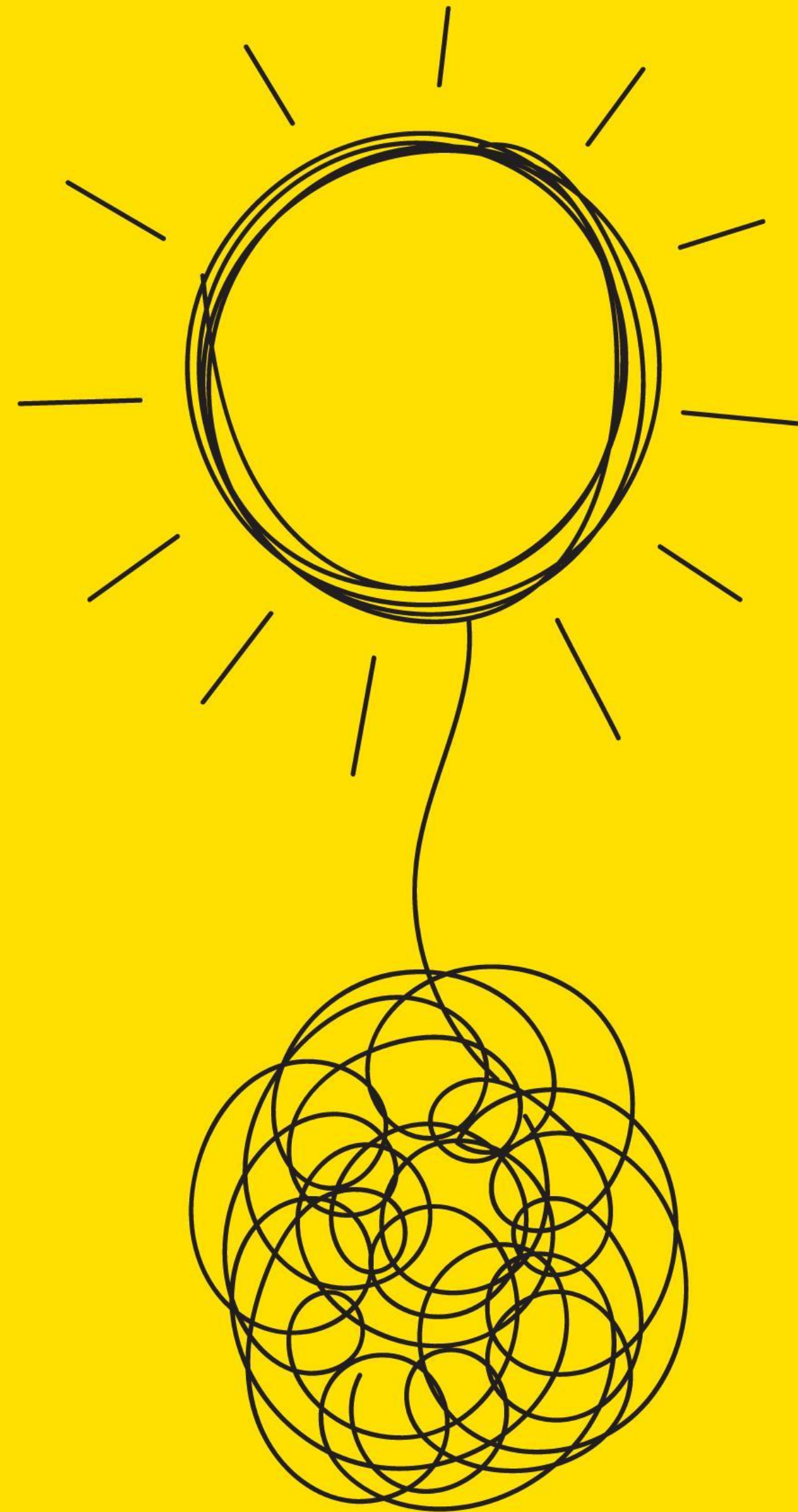
Significant increase vs 1 year ago
Significant decrease vs 1 year ago

Community Sentiment Scorecard: May 2024

	2018	2019	2020	2021	2022	2023	2024
Perceptions							
Positive ratings about the Australian cattle industry (Feel good + very good) – Among meat eaters	65	66	67	66	60	63	63
Positive ratings about the Australian lamb industry (Feel good + very good) – Among meat eaters	60	62	62	61	56	59	60 ↑
Agree with 'Australian cattle farmers make a positive contribution to society'	59	61	63	64	61	61	63 ↑
Agree with 'Australian sheep farmers make a positive contribution to society'	57	61	62	62	58	60	62 ↑
Agree with 'The Australian cattle and sheep industry is committed to sustainable production of beef and lamb'	52	54	56	53	51	50	51 ↑
Agree with 'Australian beef is environmentally friendly & sustainable'	44	47	53	50	42	41	44 ↑
Agree with 'Australian lamb is environmentally friendly & sustainable'	43	46	51	50	42	41	44 ↑
Agree with 'Australian cattle are farmed and raised in a humane manner'	50	51	55	56	55	55	55
Agree with 'Australian sheep are farmed and raised in a humane manner'	49	50	55	53	55	54	55 ↑
Knowledge							
Agree with 'I have a very good knowledge and understanding of the Australian beef industry'	24	24	30	30	26	25	26 ↑
Agree with 'I have a very good knowledge and understanding of the Australian lamb industry'	23	20	27	26	23	22	24 ↑
Agree with 'It is important for school children to learn about how beef and lamb is produced'*	73	72	73	70	72	71	73 ↑
Visitation							
Have visited a cattle or sheep farm	40	41	38	38	37	38	37
Agree with 'I am interested in visiting a cattle or sheep farm' – Among meat eaters	40	36	44	41	38	40	41

Significant increase vs 1 year ago
Significant decrease vs 1 year ago

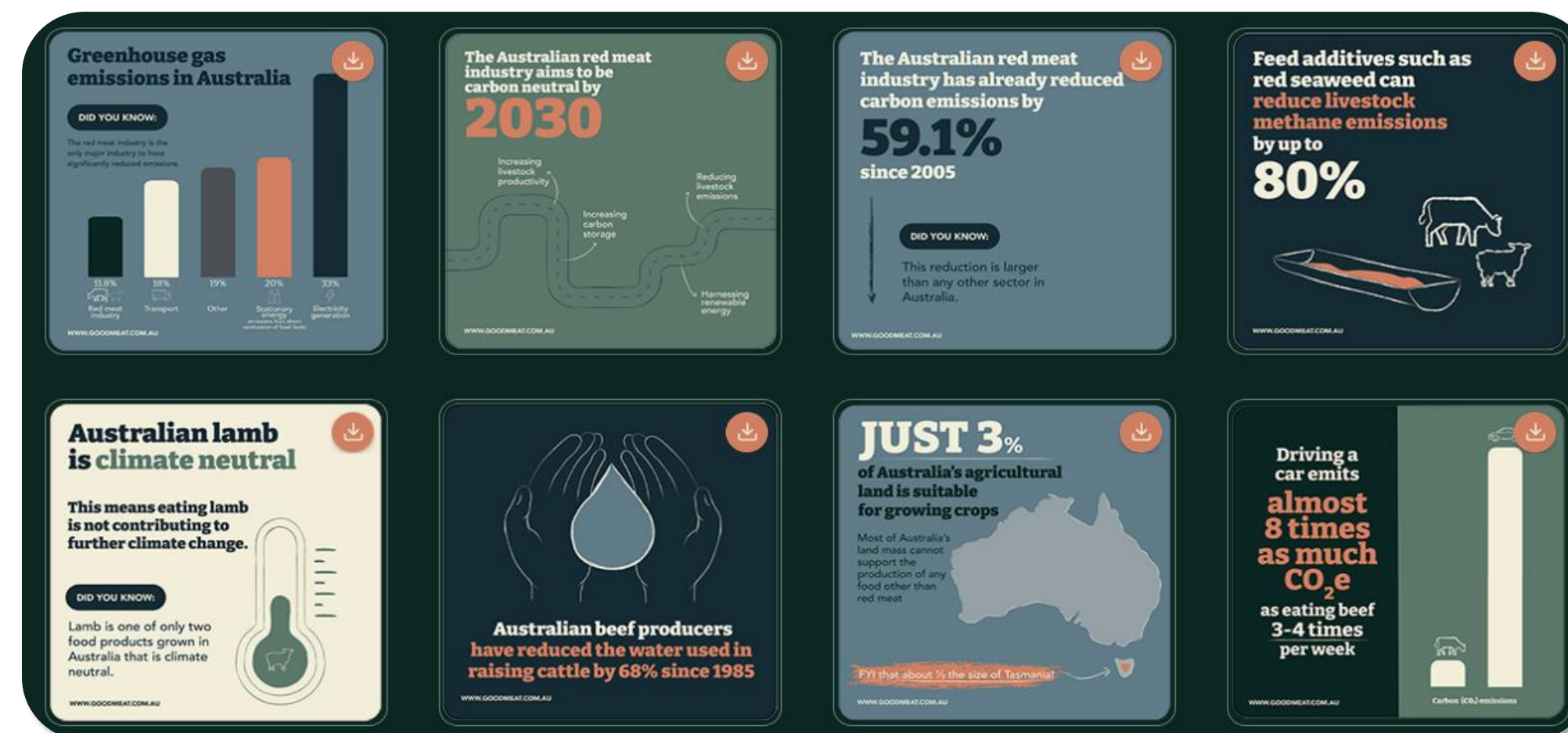
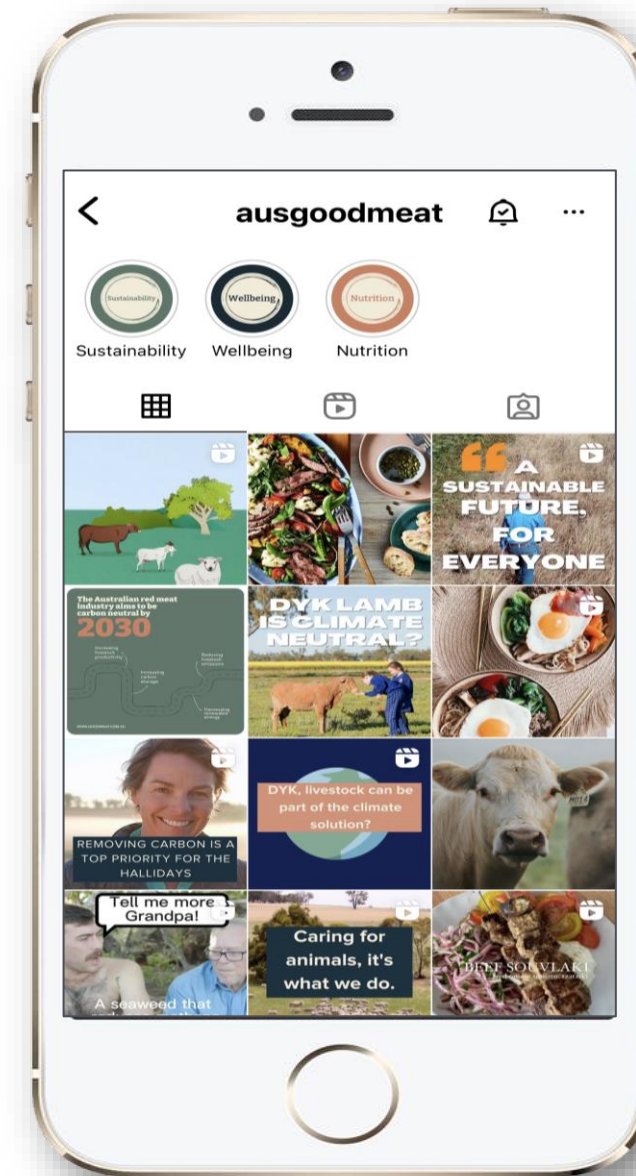
*Statement change in 2022 from 'beef, lamb, and food' to 'beef and lamb'



Key insights

- Number of red meat reducers has declined as the number of households increasing red meat consumptions has continued to rise in the face of cost-of-living pressures (reducers are at lowest/increasers highest levels since 2010).
- Increasers are driven by health and nutrition appeal, especially protein and iron and a corresponding rise in 'I just like meat'.
- Reducers main reason is expense 58%, with a big gap then to nutrition (19%) with environment (6%) and animal welfare (3%) at lower levels.
- Vegetarians remain at historic lows of just 5%.
- Trust in red meat producers remains high but trust to care for the environment is not as strong, especially for younger and female audiences.
- The 'moveable middle' (those with have neither negative or positive perceptions) are quite a large proportion for perceptions around animal welfare and sustainability. This indicates a lower levels of awareness or knowledge, and this group and could move into negative territory if they hear unfavourable opinions on these topics.
- There are strong correlations between knowledge, perceptions, trust and consumption patterns.
- Internet is the key source of information – digital communications important.

MLA communicates with the community via *Australian Good Meat* digital platforms: website, social media



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