



Australian consumer perceptions of
the red meat and livestock industry
Consumer sentiment research 2020

2020



Agenda

1. Industry context
2. Consumer sentiment
3. Vegetarianism understanding

Industry Context

A number of significant events have impacted the industry, across Australia and also globally

Drought



Bushfires

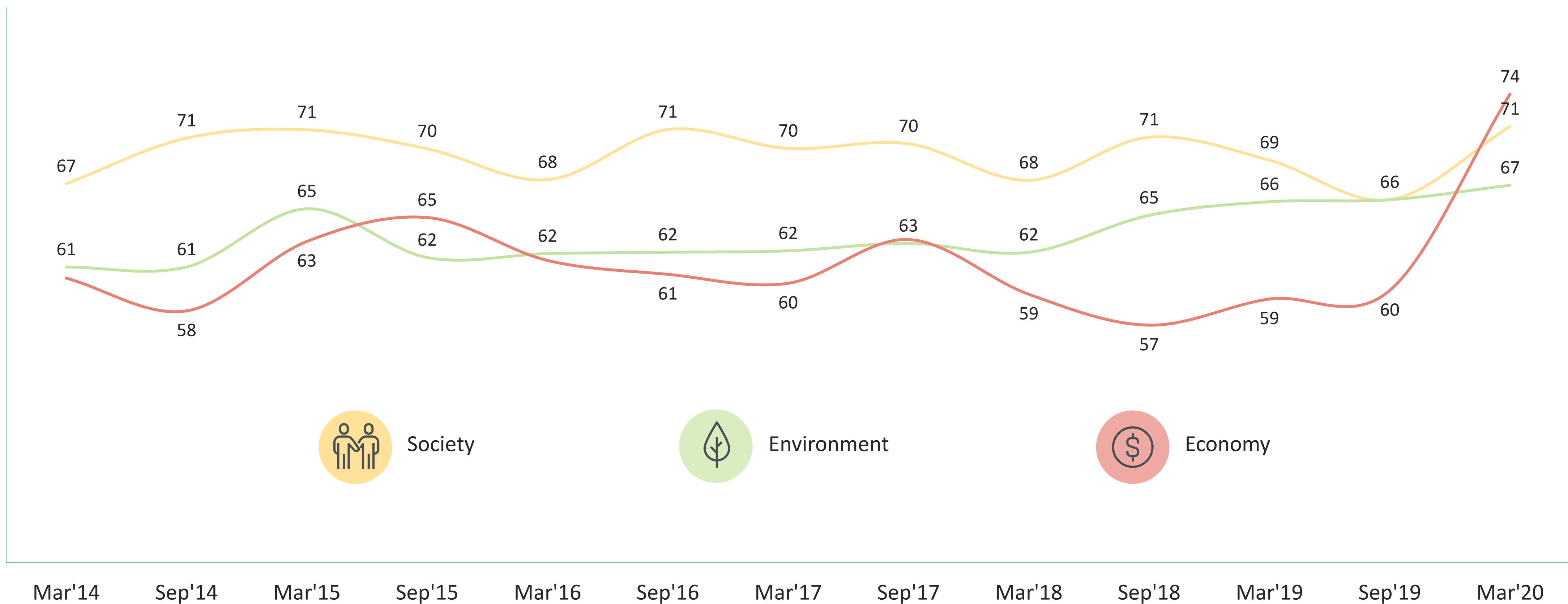


COVID-19



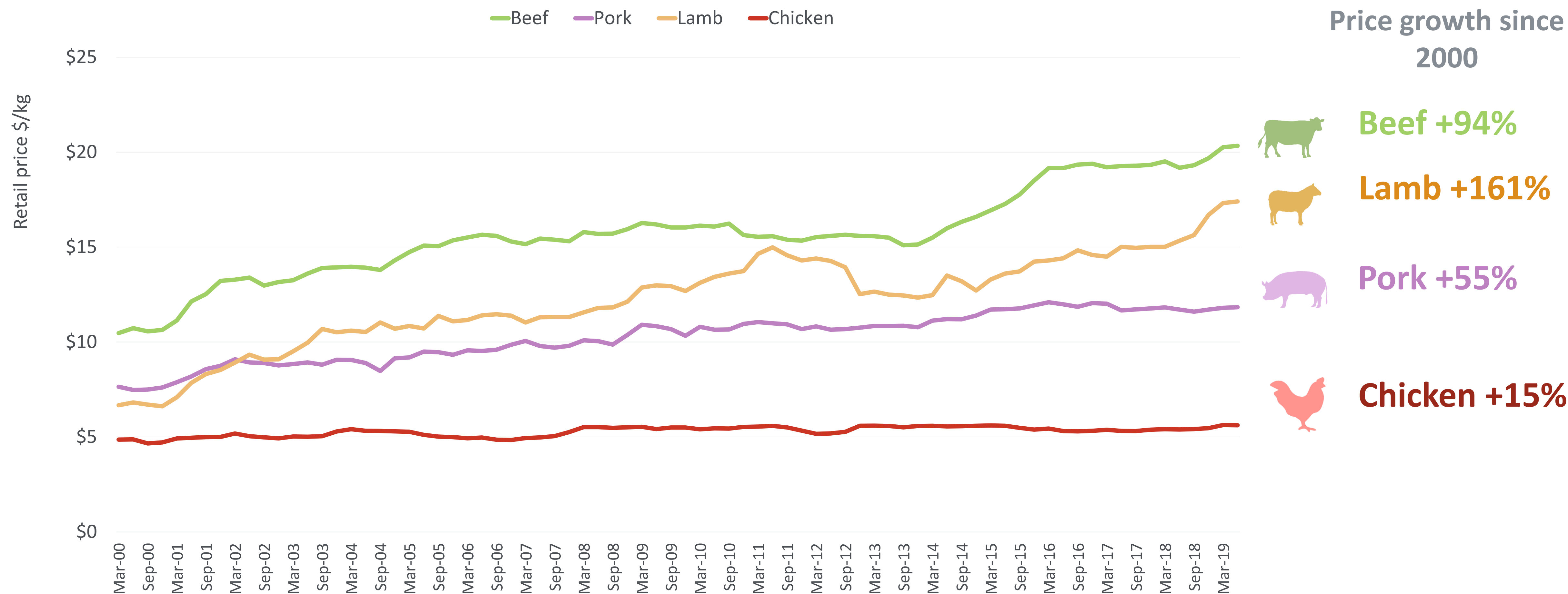
Concerns about the economy have overtaken society for the first time, and reached their highest point ever since 2014

Concern about society, economy and the environment (T2B %)



Source: Pollinate Pulse March 2020. Which of the following best describes your concern [about the environment/about the economy/for society]? I am... Base: Australians aged 14-64 (approx. n=1000 nationally representative per wave)

Price has been increasing at a higher rate for beef and lamb over time vs other proteins



Source: ABS

Consumer sentiment research

Objectives

1. Understand community sentiment towards the red meat industry
2. Identify the size and type of concerns underlying meat eaters reducing consumption
3. Identify the incidence of claimed vegetarians and their drivers of concern with the red meat industry

The research will be used to:

- Inform the community engagement strategy addressing community concerns
- Benchmark the impact of MLA's programs on building community trust in the beef and lamb industry

Methodology



15 minute
online survey



~n=1500 main
grocery buyers and
meal preppers aged
18-64, living in
metro Australia



Conducted
annually in June
since 2010



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



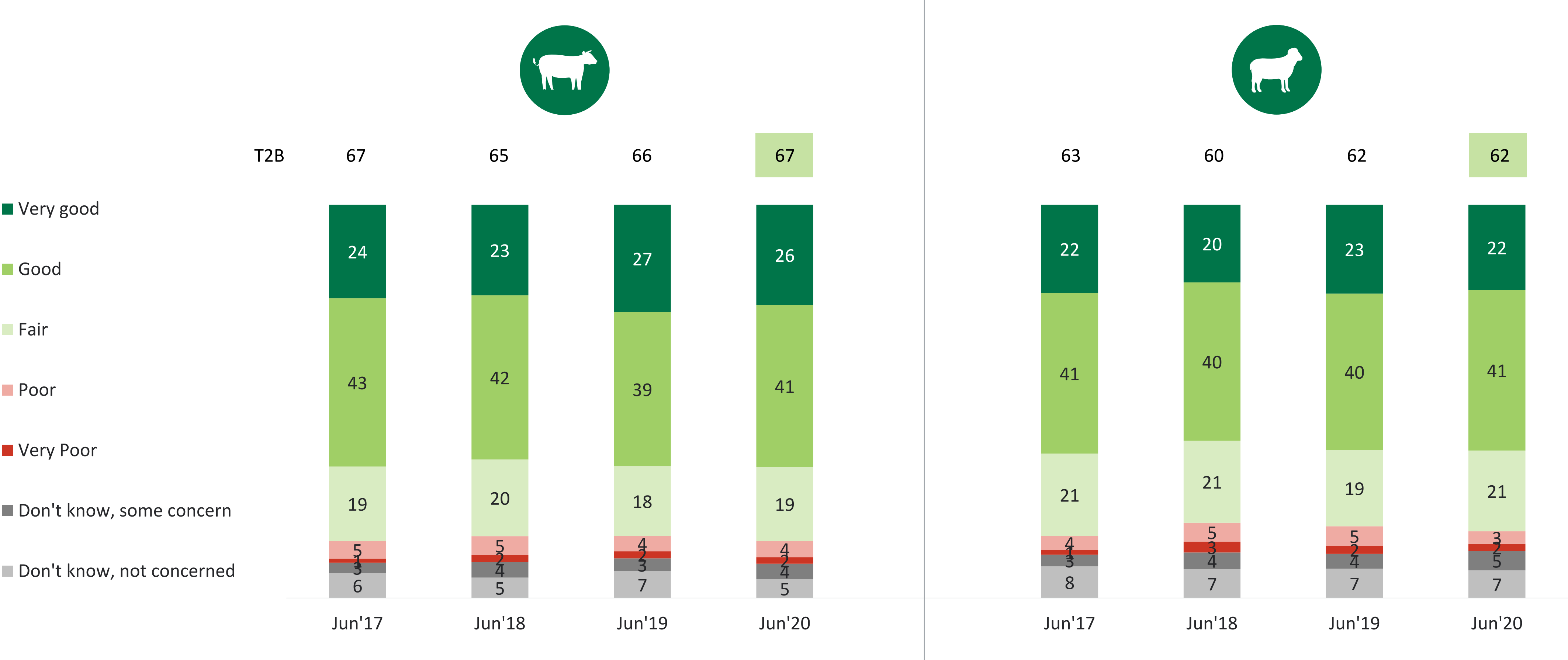
Industry perceptions

Key findings

- Industry perceptions are largely positive
- People are hearing more positive messages about the beef and lamb industry – particularly around industry standards and economic impact
- Perceptions around sustainability and ethics have improved (particularly in Australia)

Industry perceptions of the production of red meat is largely positive, and stable over time

Perception of Australian producer 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=1400/ 1425 / 1288 /1434

Awareness of positive industry messaging is up

...but remains low – only ~50% have heard something positive about the Australian beef or lamb industry

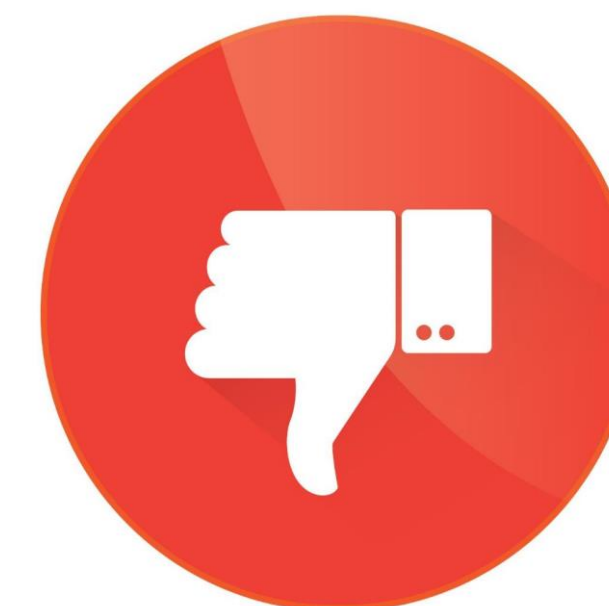
In 2020 the community are hearing more about **high standards** and the industry's **positive impact** on the Australian economy



Awareness of negative industry messaging is flat

~40% have heard something negative about the Australian beef or lamb industry

Negative messaging is mostly around **animal welfare** and **live export**

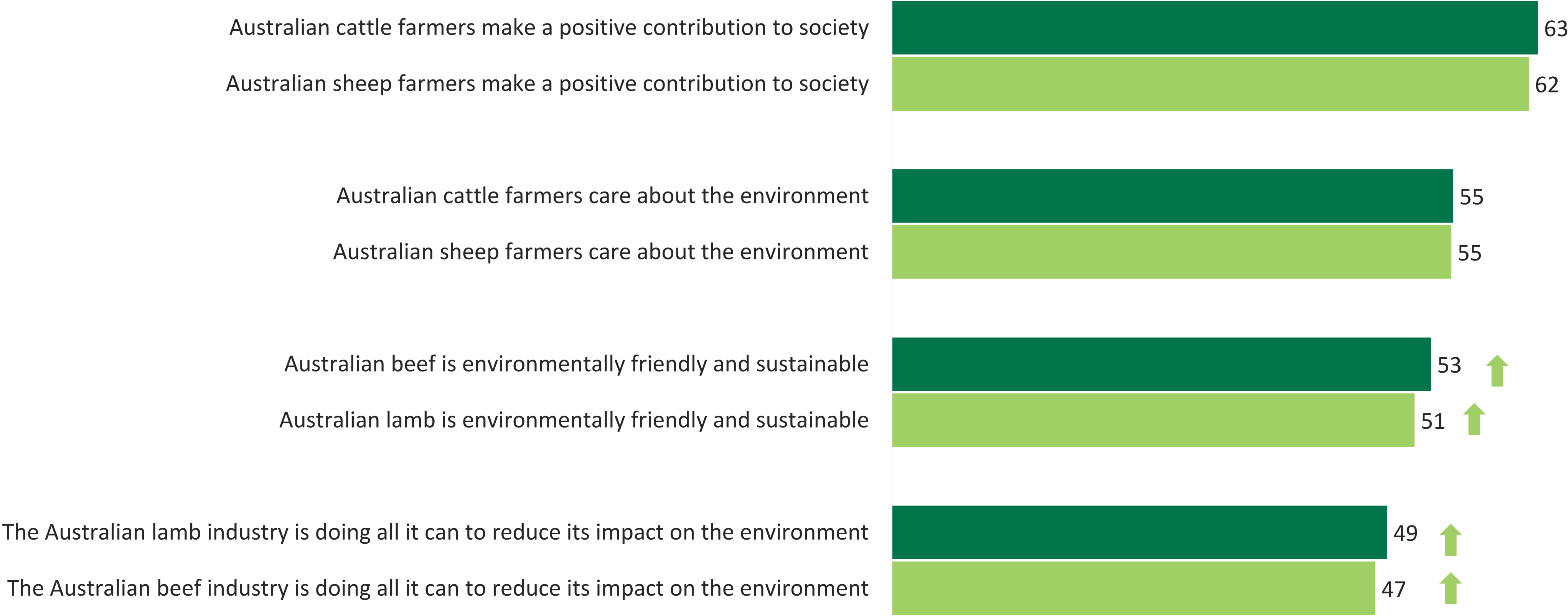




Increase in positive perceptions of the Australian beef and lamb industry in relation to sustainability and environmental impact

Agreement with statement (T2B %)

↑ Significant increase June 20

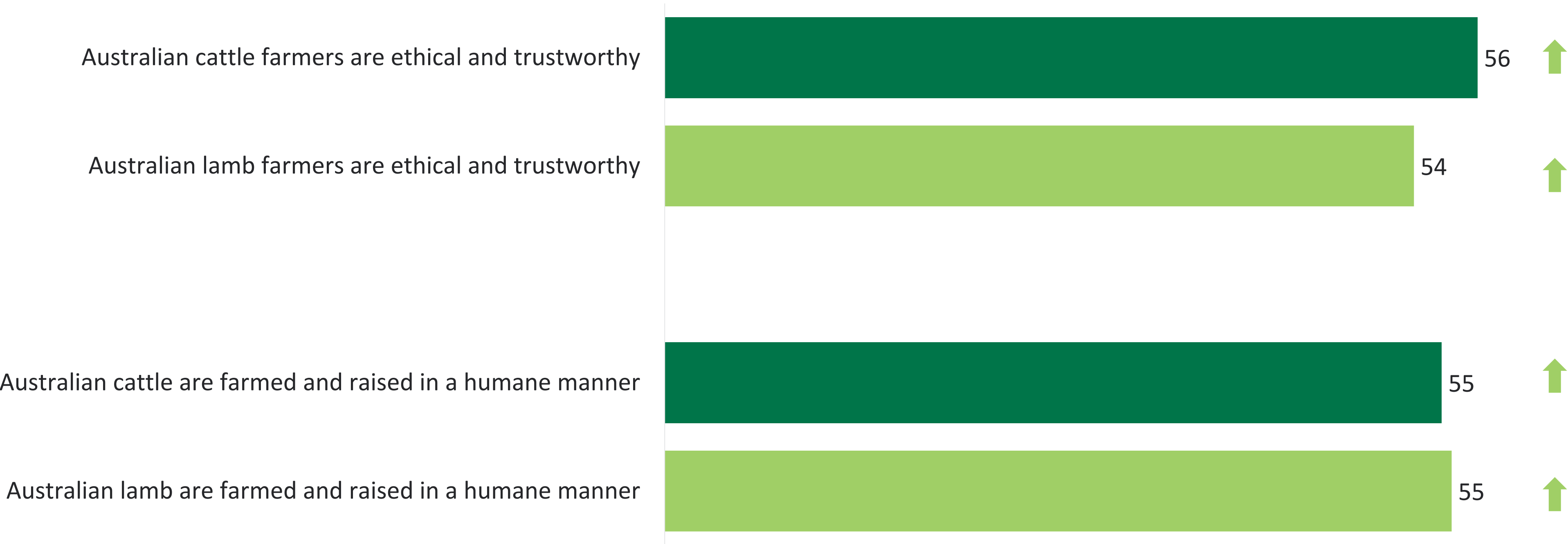


Perceptions of ethical and humane treatment within the Australian industry have also become more positive this wave



Agreement with statement (T2B %)

↑ Significant increase June 20





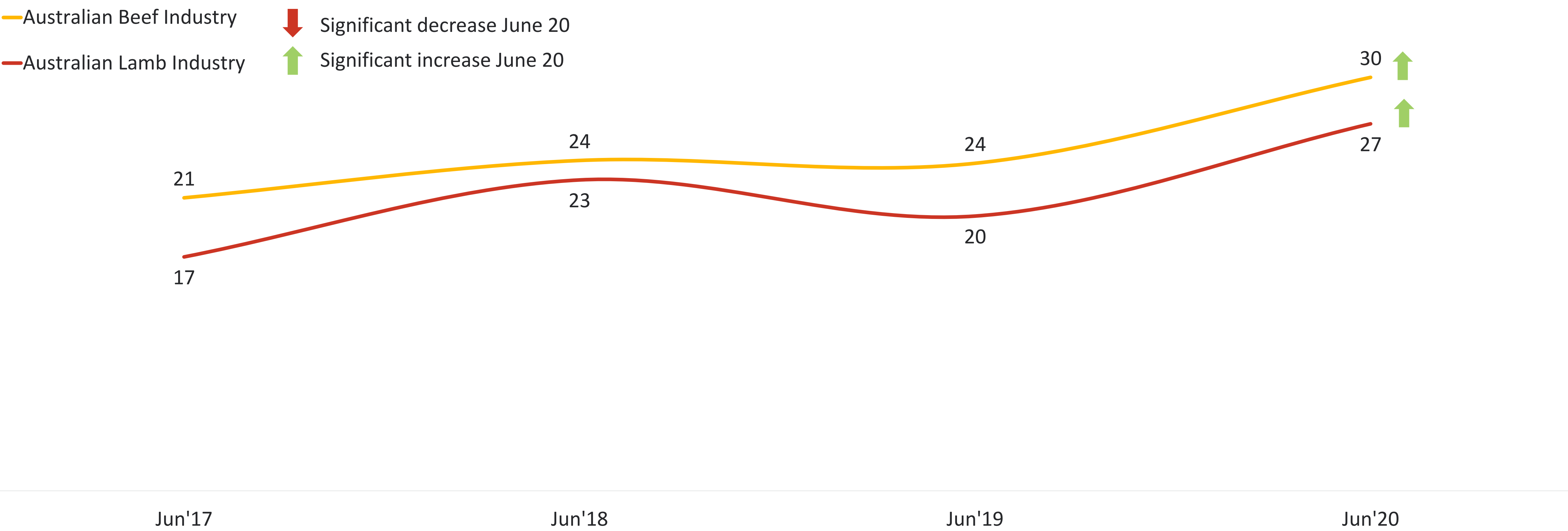
Knowledge

Key findings

While perceived industry knowledge has increased, people feel they know less about the specifics, e.g. environmental impact and industry ethics

Overall, perceived knowledge of both the Beef and Lamb industries in Australia is on the rise

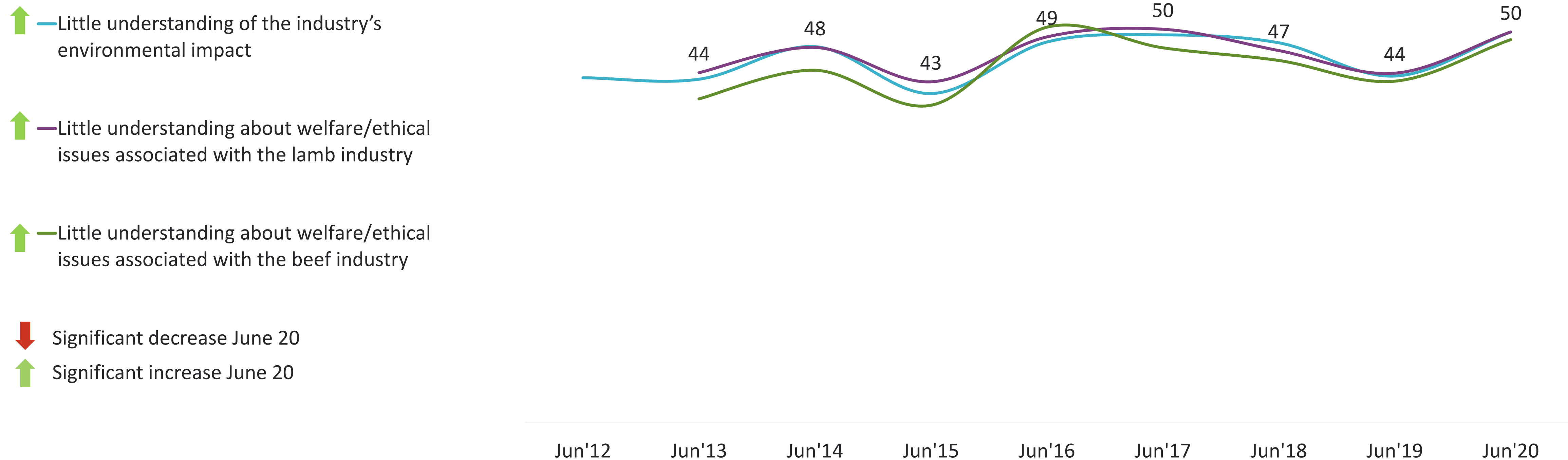
I have a very good knowledge and understanding of... (Agree + strongly agree %)



A10A/B Please indicate how much you agree or disagree with the following statement. I have a very good knowledge and understanding of the Australian beef / lamb industry.
Base n=1501/15381422/1556

But when it comes to specifics there are also more people who feel they have little understanding

Agreement with statements (T2B %) – Among meat eaters





Information sources

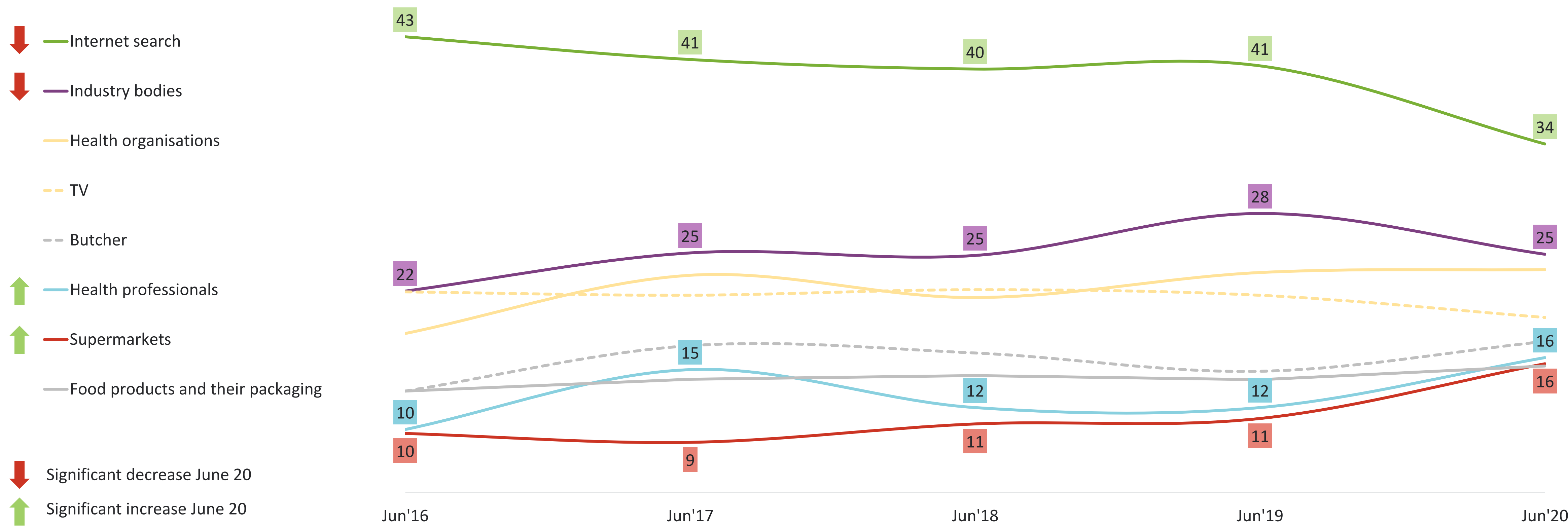
Key findings

- The internet, industry bodies and health professionals are still top sources
- Supermarkets, butchers and manufacturers are becoming more important

Supermarkets have also become more important for animal welfare information, as have health professionals. Internet and industry bodies are declining



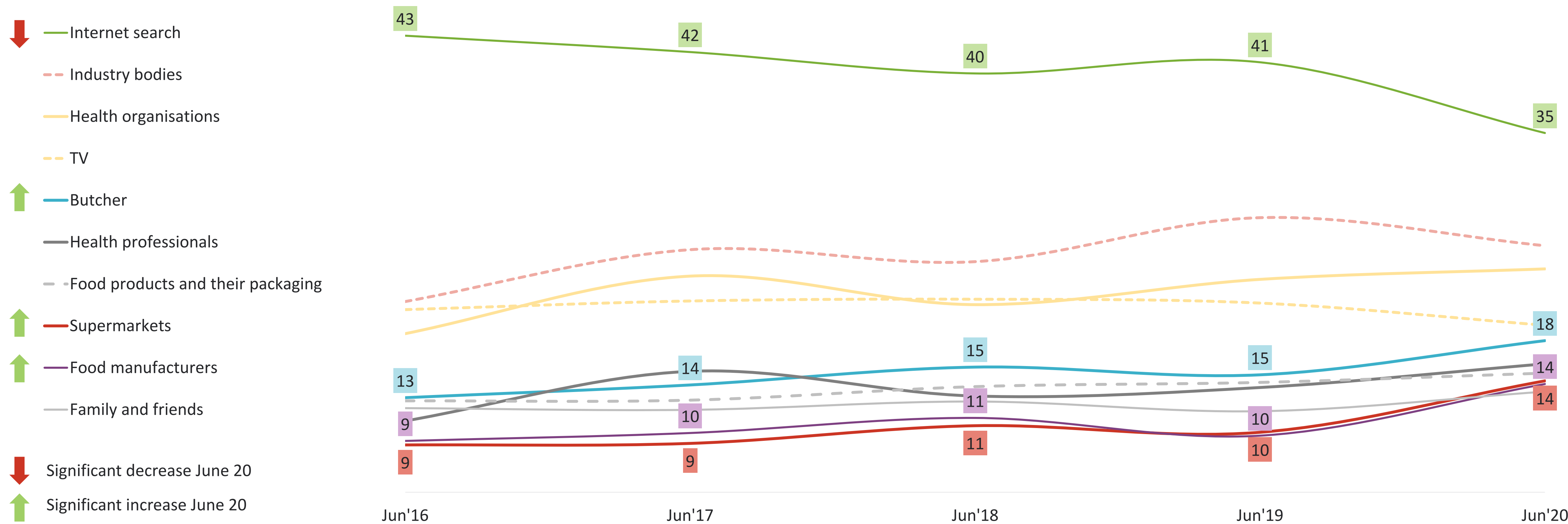
Sources of information about beef and lamb animal welfare (Top 8 - %)



Supermarkets are also becoming more important for information around environmental impact, along with manufacturers and butchers.



Sources of information about beef and lamb environmental impact (Top 10 - %)





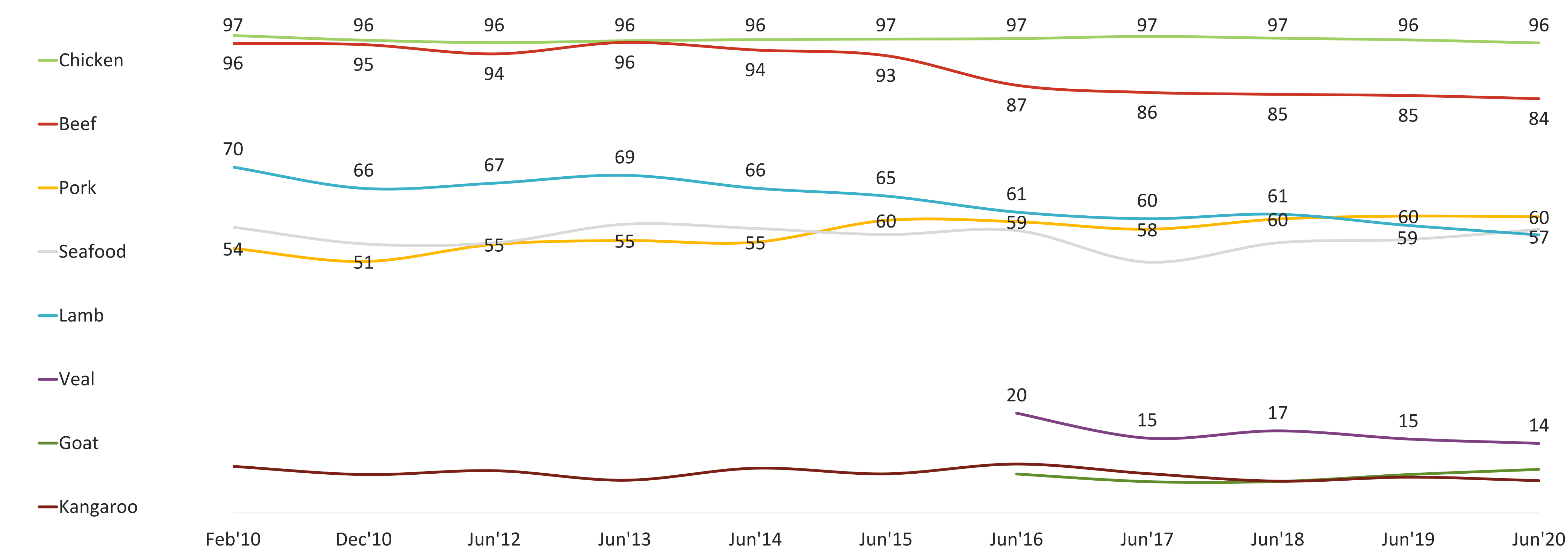
Consumption

Key findings

- Consumption of red meat is stable
- Most have not reduced and are not planning to reduce

Consumption of red meat is relatively stable over time

Buy and eat regularly (%) – Among meat eaters



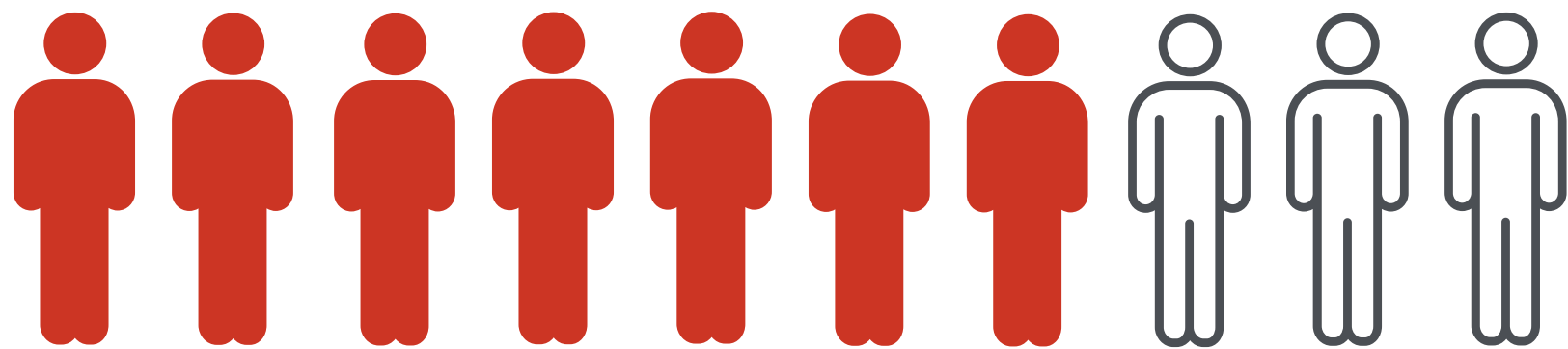
A1. Which of the following do you buy and eat regularly at home? Base Those who eat meat (n=761/1000/1002/602/1001/1007/1389/1400/1425/1288/1434)

Most red meat eaters have NOT reduced consumption in the last year, nor are they planning to do so next year

Last 12 months



Next 12 months



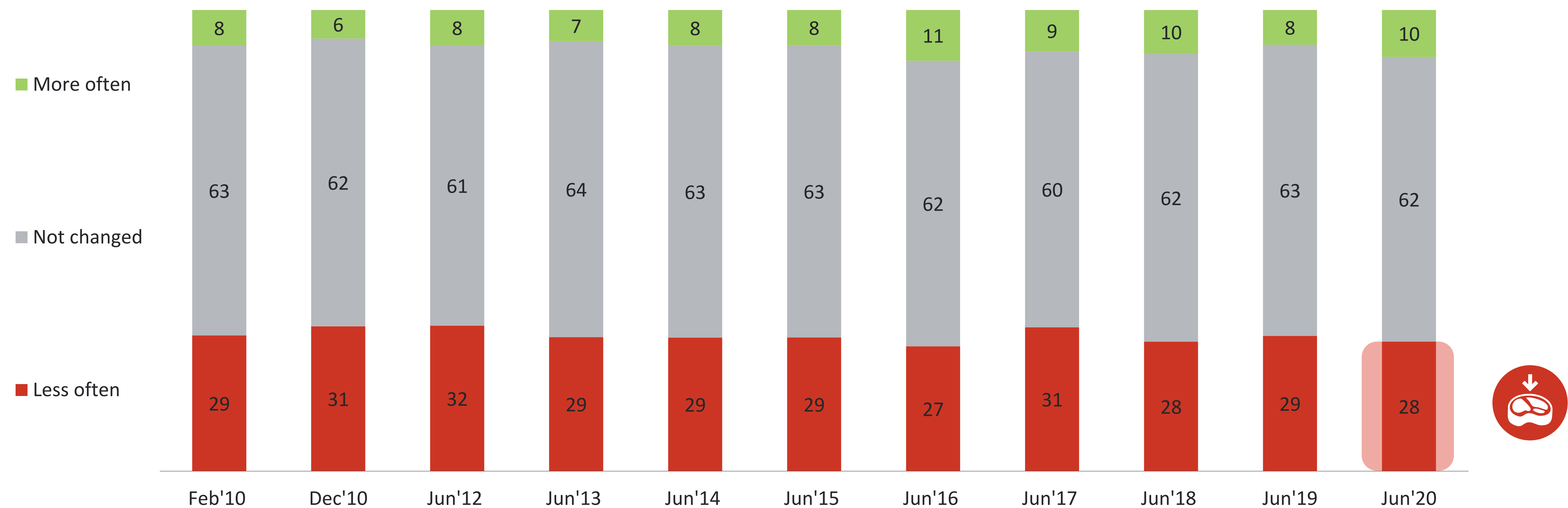
7 out of 10 meat eaters have NOT reduced their red meat consumption



8 out of 10 meat eaters are NOT planning to reduce their red meat consumption

The proportion of red meat reducers remains stable at less than 1 in 3

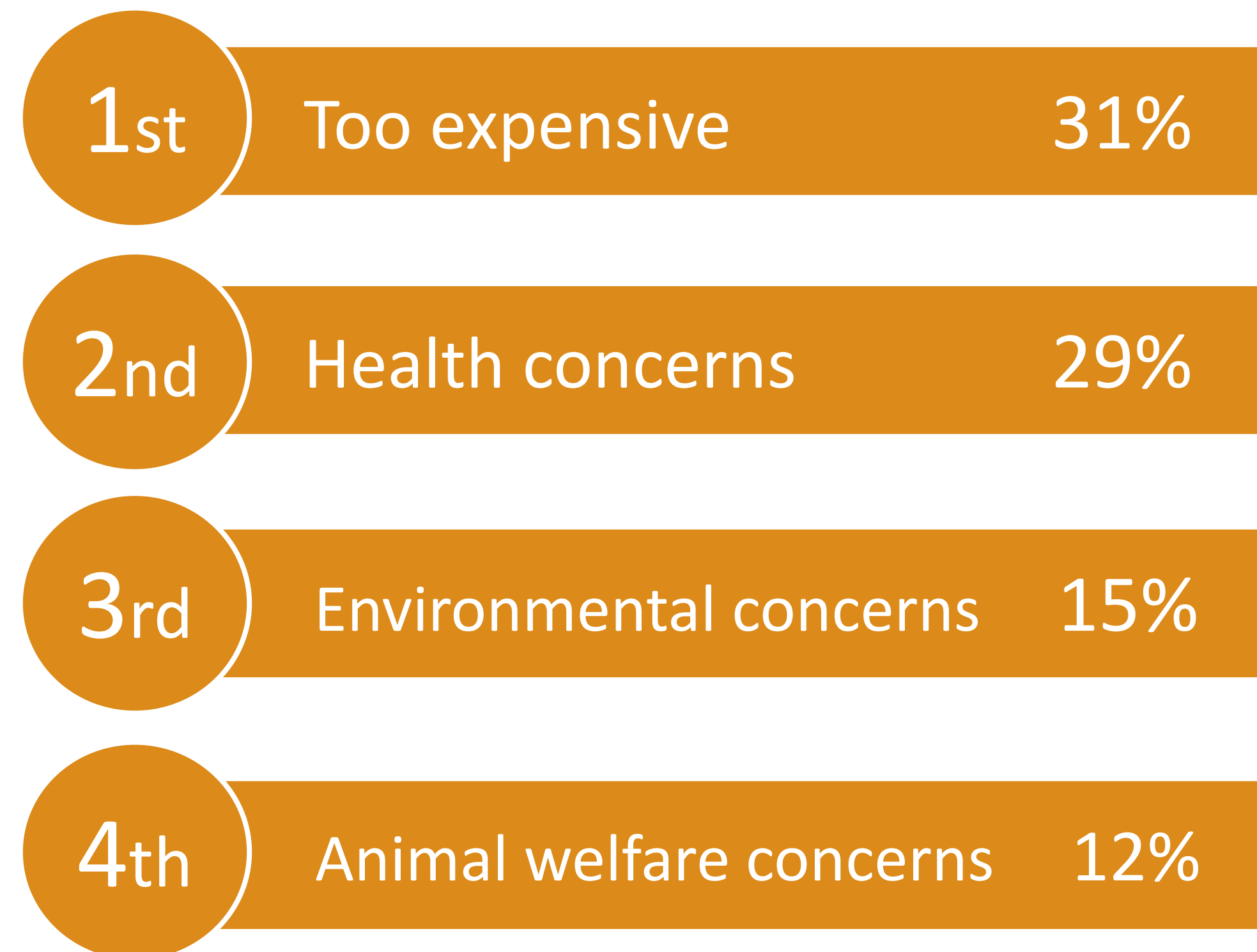
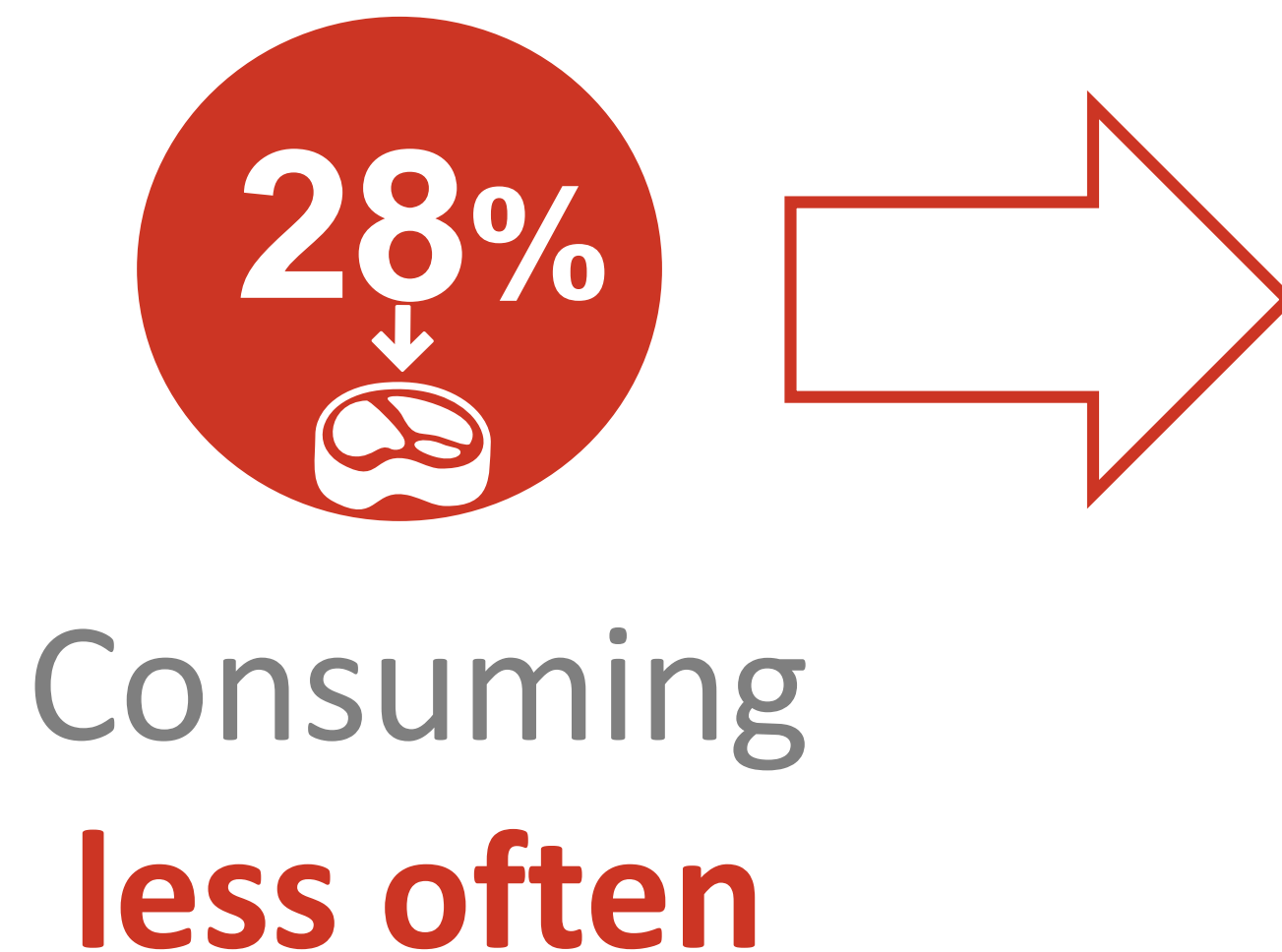
Relative red meat consumption, compared to 1 year ago (%) – Among meat eaters



A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago? Base n=761/ 1000/1002/602/1001/1007/1389/1400/1425/1288/1434

Cost and health remain the primary drivers of red meat reduction, followed by concerns about the environmental impact

Top reasons for eating less red meat (%) | red meat reducers





Vegetarianism understanding

The number of people in metro Australia who claim to be vegetarians has remained stable since 2016

Are you a vegetarian? (%)

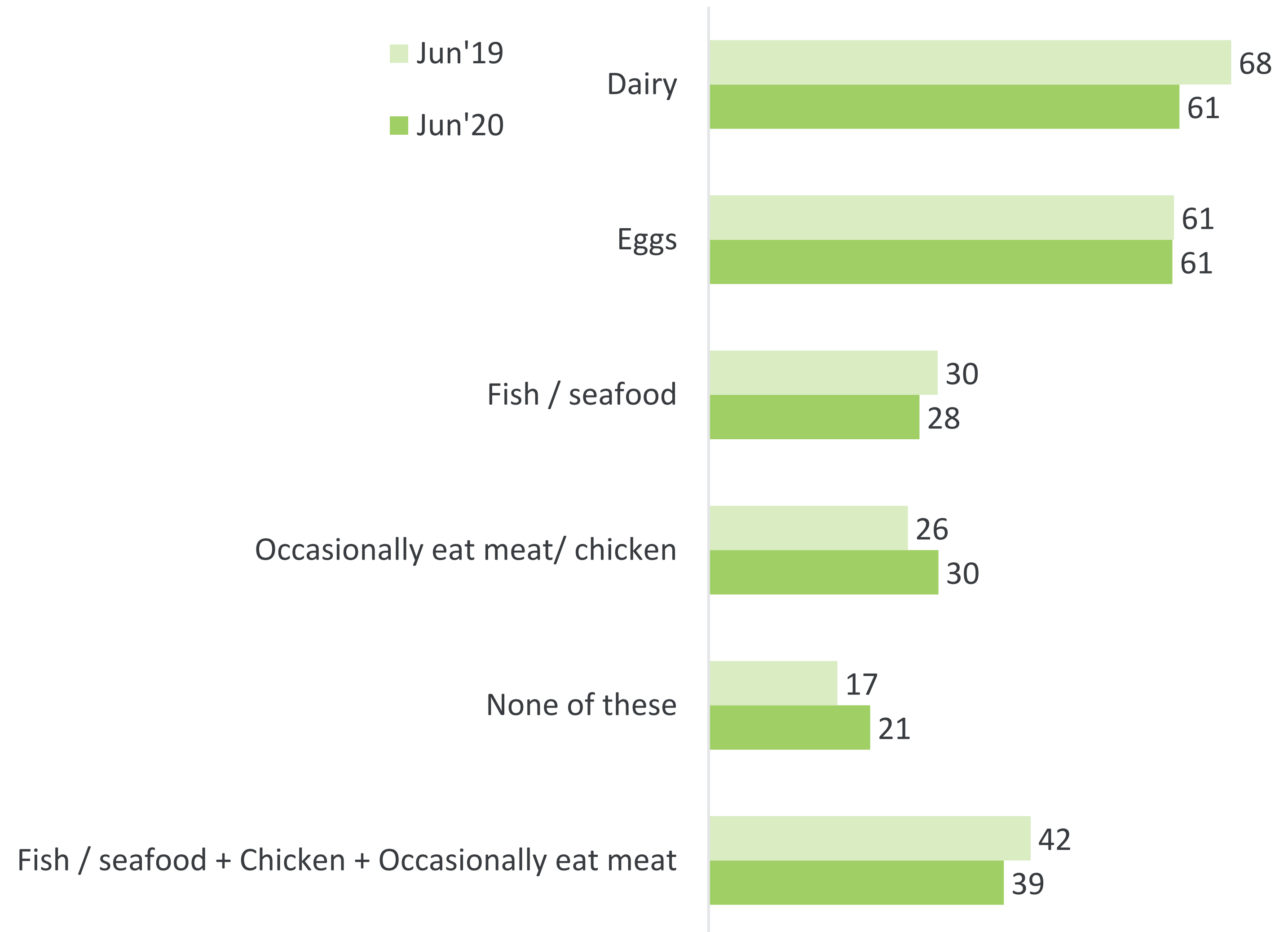


39% of claimed vegetarians still eat meat

Do you eat any of the following? (%)

Among claimed vegetarians

7% 

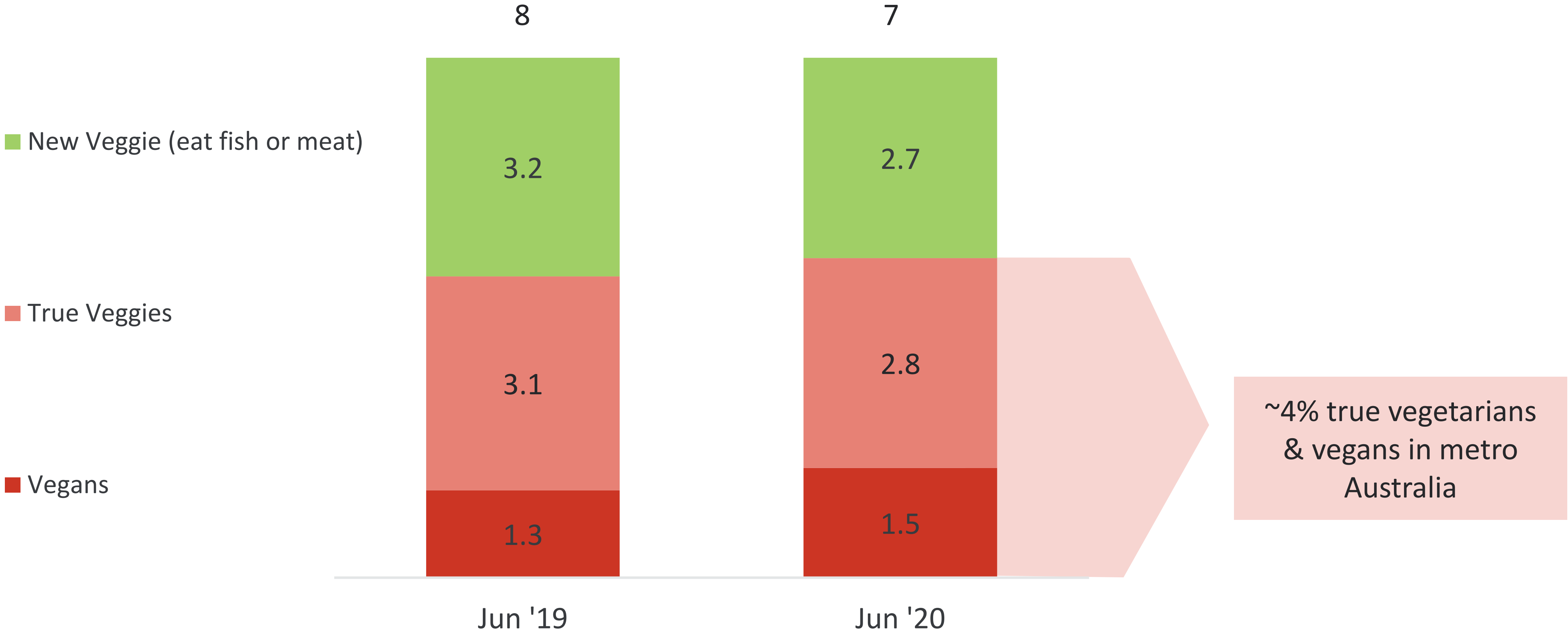


The proportion of vegans is small, with the total incidence of vegans & true vegetarians sitting around 4% in metro Australia

7%



Vegetarianism in metro Australia (%)



S7. Are you a vegetarian? Base n=1422 / 1556
S7B. Do you eat any of the following? Base: Those who claim to be vegetarian, n=107/109

Summary

Summary

Red meat industry perceptions are improving

Despite an environmentally, socially and economically tumultuous year the red meat industry has managed to maintain or grow positive industry perceptions

Consumers are hearing more positive messages about the industry

There have been increases in positive industry perceptions in relation to sustainability, environmental impact and animal welfare

People know more, but also less than ever before

Perceived industry knowledge has increased.

When it comes to specifics around environmental impact and animal welfare people are more likely to feel uninformed

Industry bodies and health professionals are still important information sources.

Supermarkets, butchers and manufacturers are becoming more important

Red meat consumption and reduction is stable

Overall meat consumption is stable over time

The portion of red meat reducers in the community is stable. Cost and health are still important, environmental impact and animal welfare concerns are becoming more prominent

The proportion of vegetarians is stable, with some also eating meat occasionally

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