

Community sentiment research overview summary 2022



Terms of use as per last page of this document

Methodology

Since 2010

Online survey of n=1506

Main grocery buyers and
main meal preparers

Aged 18-64 , Metro Australia

Conducted by Pollinate research agency



Key insights for 2022

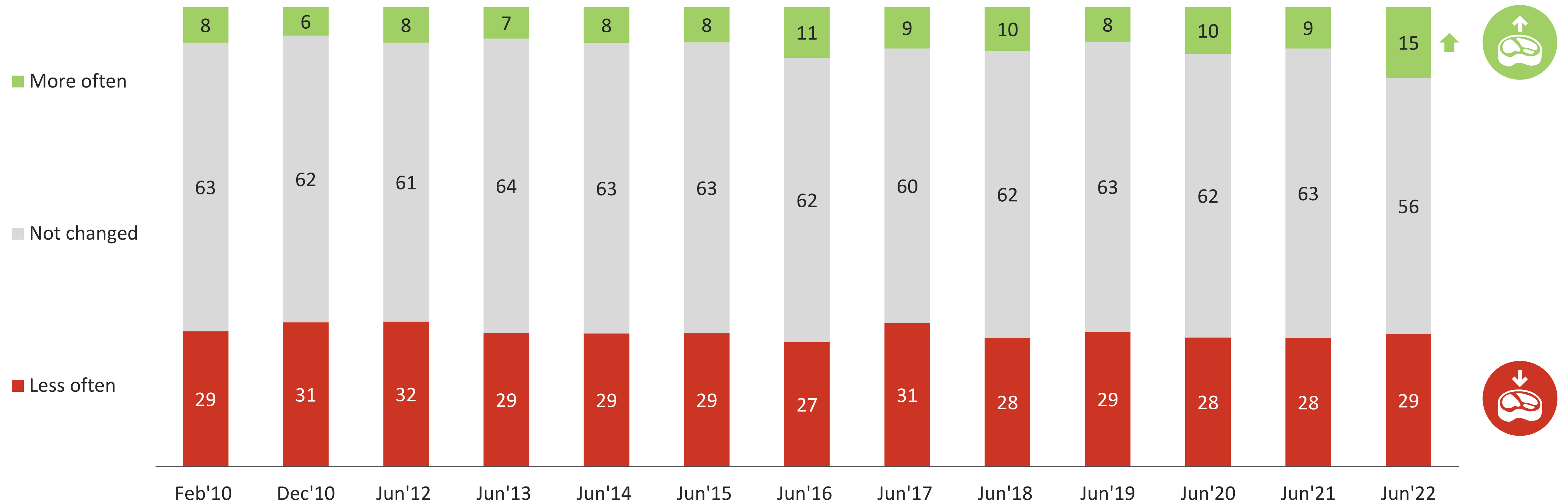
- **Drivers and barriers** to red meat consumption “*same-same but different*”
- **Health** is polarising, but key to drive consumption of red meat
- **Vegetarians** are not taking over the world
- Red meat **industry perceptions** are largely positive
- **Knowledge of the industry** influences perceptions towards red meat
- There are three **key drivers of trust** in our industry
- Implications: continue to **focus on raising knowledge** of our industry – in particular around environment and animal welfare practices



Consumption

Consumption trends are relatively stable – slight increase in both ‘increasers’ and ‘reducers’

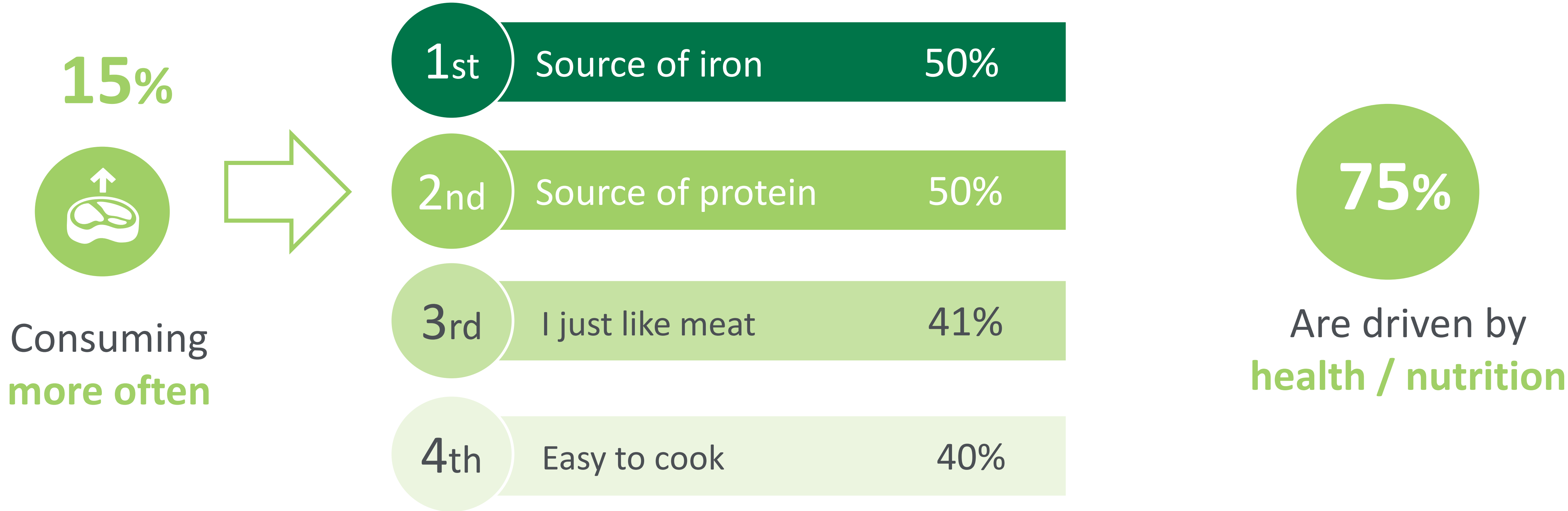
Relative red meat consumption, compared to 1 year ago (%) – Among meat eaters



A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago? Base n=761/ 1000/1002/602/1001/1007/1389/1400/1425/1288/1434/1362/1394

For those increasing red meat consumption this is largely driven by health and nutrition e.g. source of iron and protein

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

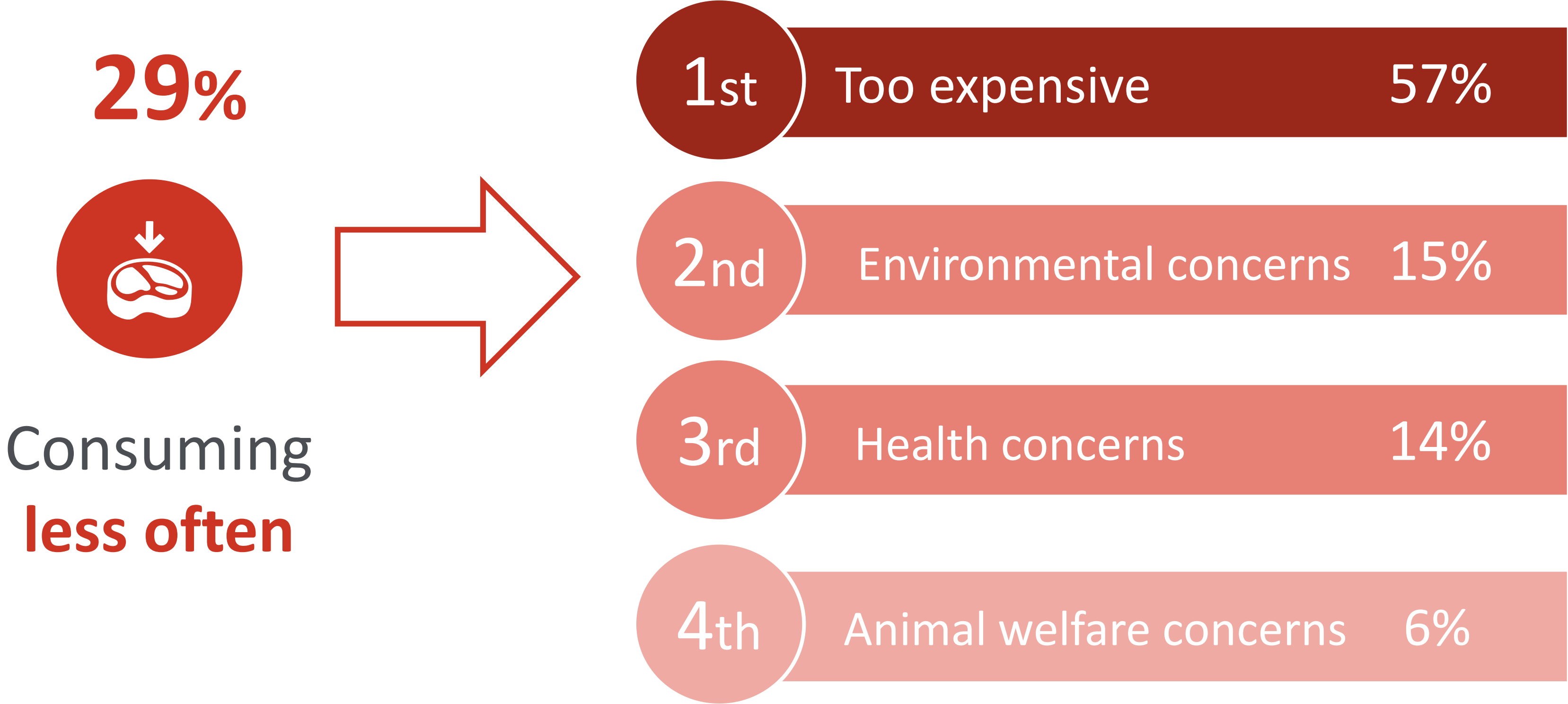


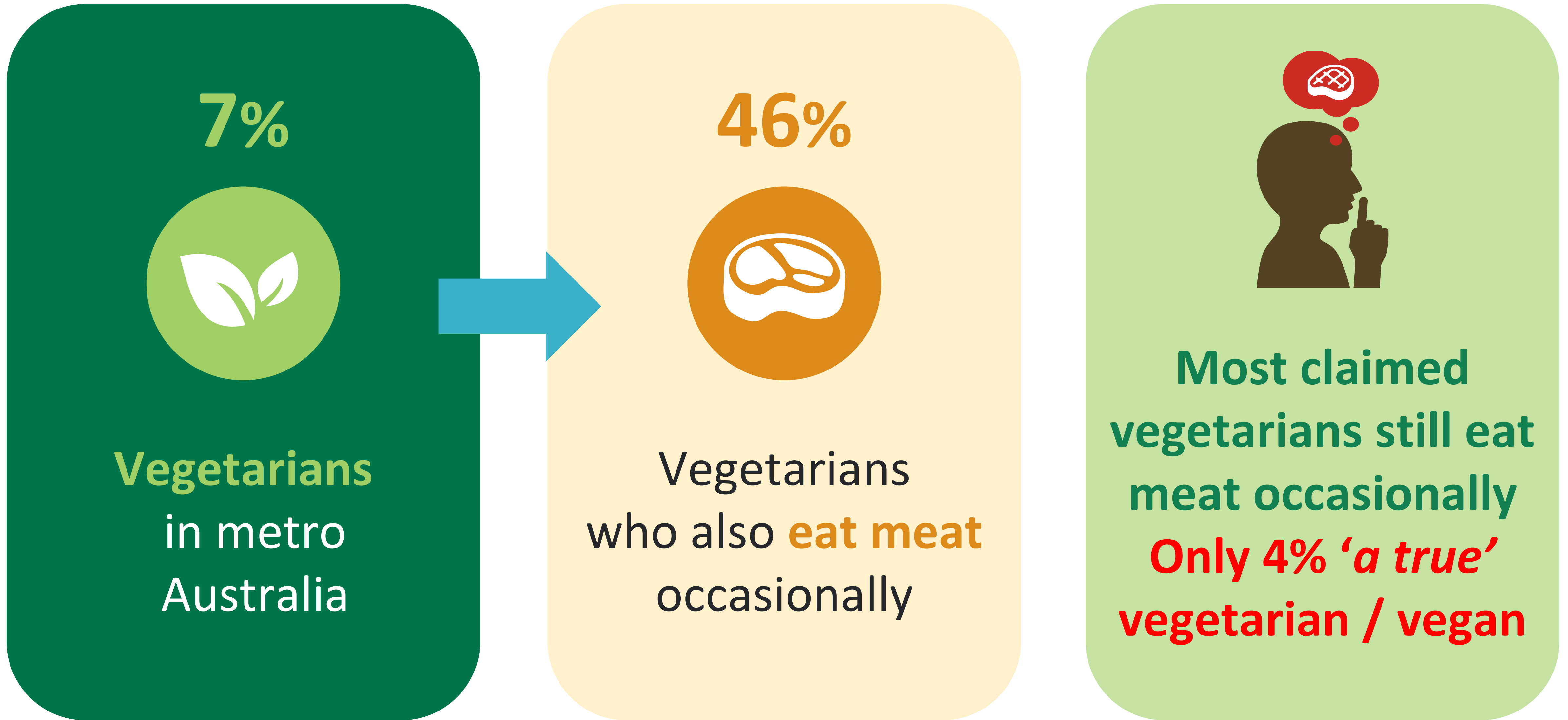
QA7A You mentioned you are eating more red meat now. Why is that? Base: Those eating more red meat (Jul'22 n=215)

RESTRICTED

For meat reducers, cost is the primary driver by a long shot

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





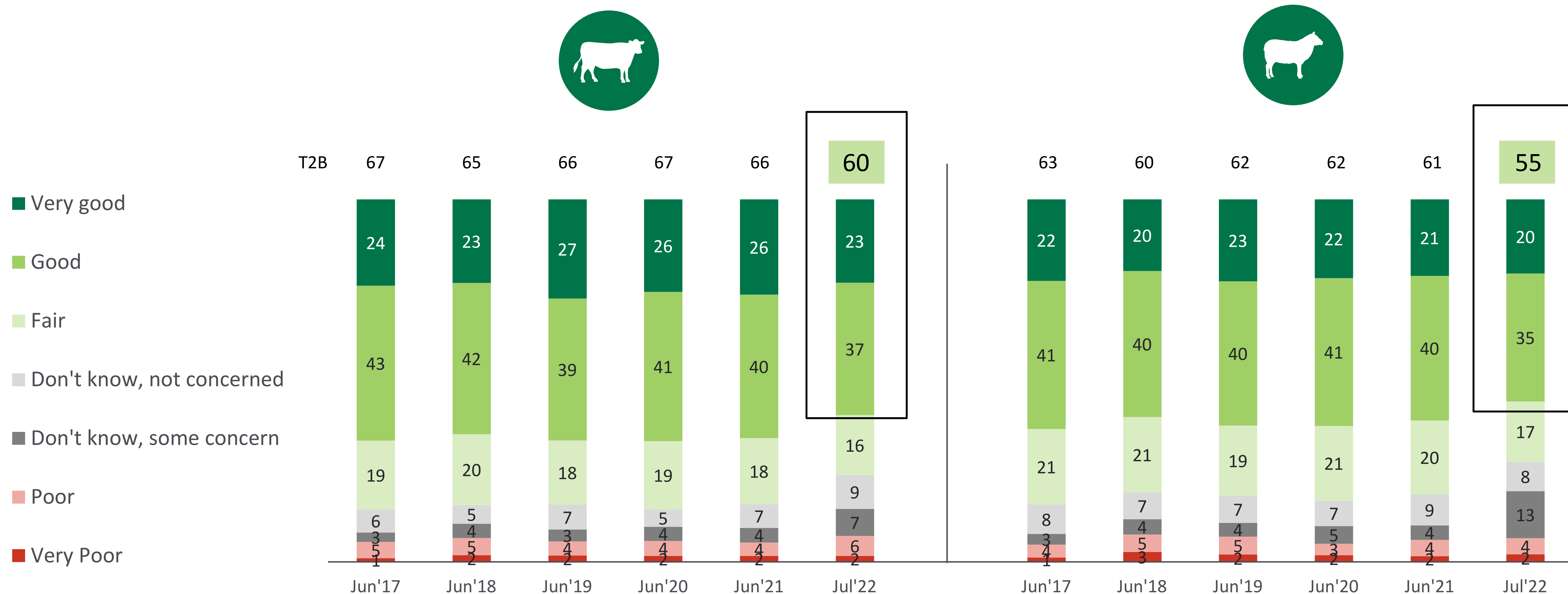
S7B. Do you eat any of the following? Base: Those who claim to be vegetarian n=100. "Meat" includes chicken and fish/seafood



Community perceptions of the industry

Community have quite positive perceptions of the red meat industry – few have negative perceptions

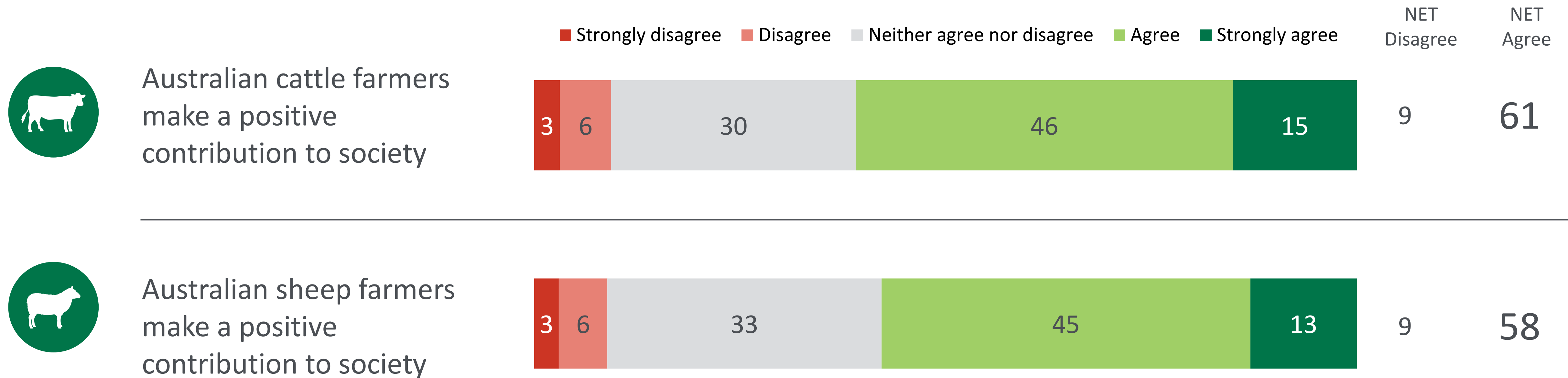
Consumer perceptions of Australian producer industries (%) – Among meat eaters



X1. Thinking about the production of the following foods in Australia, how do you feel about each industry? The Australian _____ industry is... Base n=1400/1425/1288/1434/1362/1394

There is little disagreement about the positive contributions towards society

Attitudes towards beef/lamb industry (%)



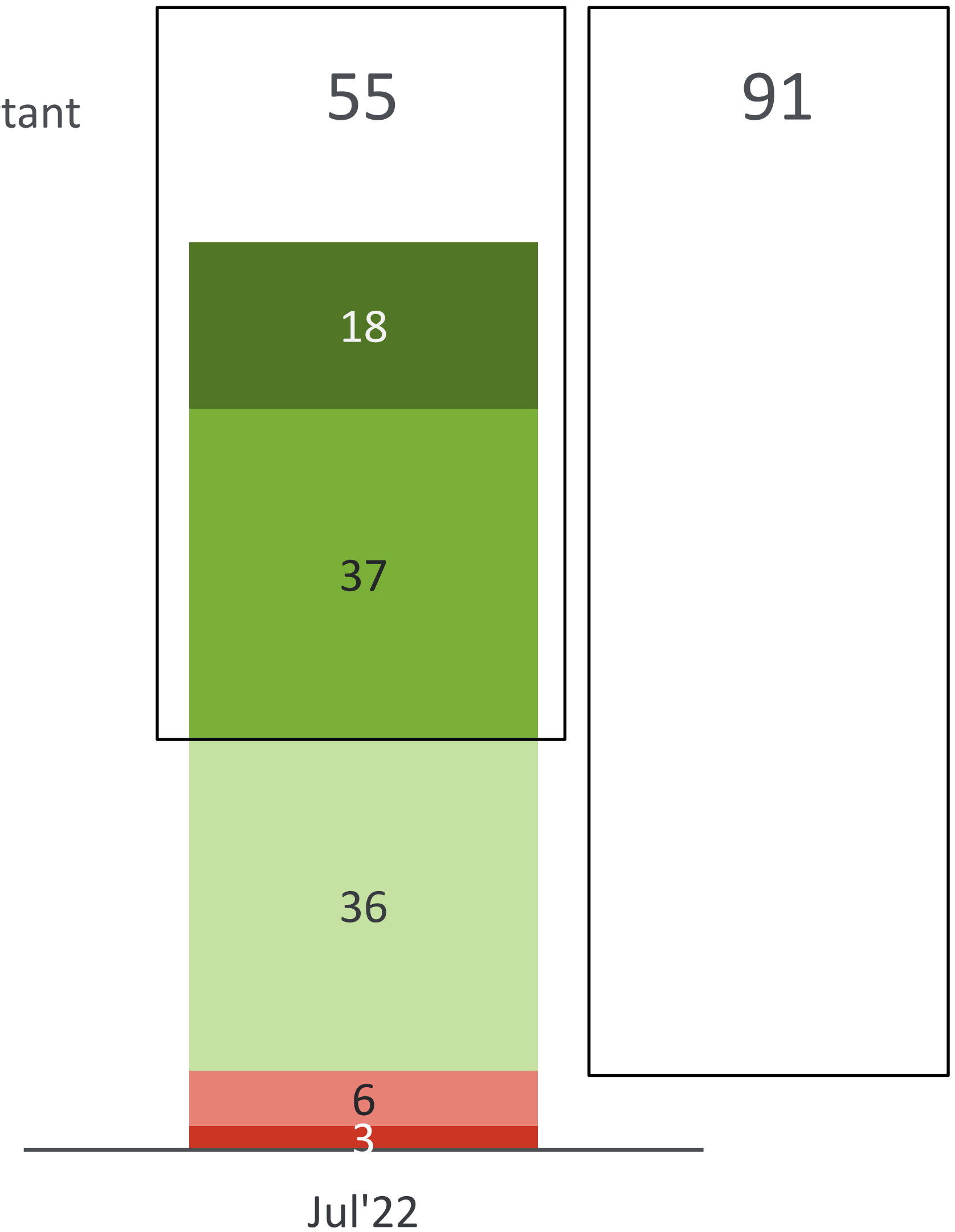
Instead, 1 in 3 are on the fence – presenting an opportunity to shift perceptions

Sustainability is personally important to most metro Australians

Personal importance of sustainability (%)

NET Extremely + Very important

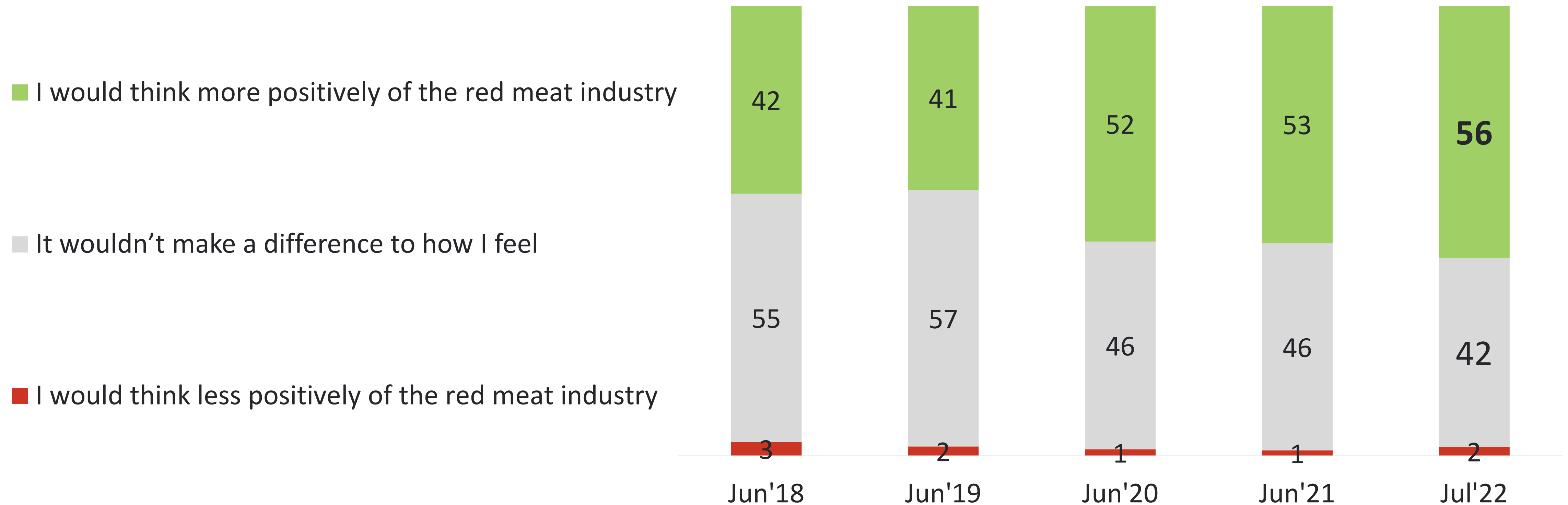
- Extremely important
- Very important
- Somewhat important
- Not very important
- Not important at all



Over half would feel more positive about the red meat industry if emissions were reduced to net zero by 2030



If cattle industry can reduce greenhouse gas emissions to net zero by 2030... (%)





Community's knowledge of the Industry



29% (almost 1 in 3) people
think they have knowledge
of the industry



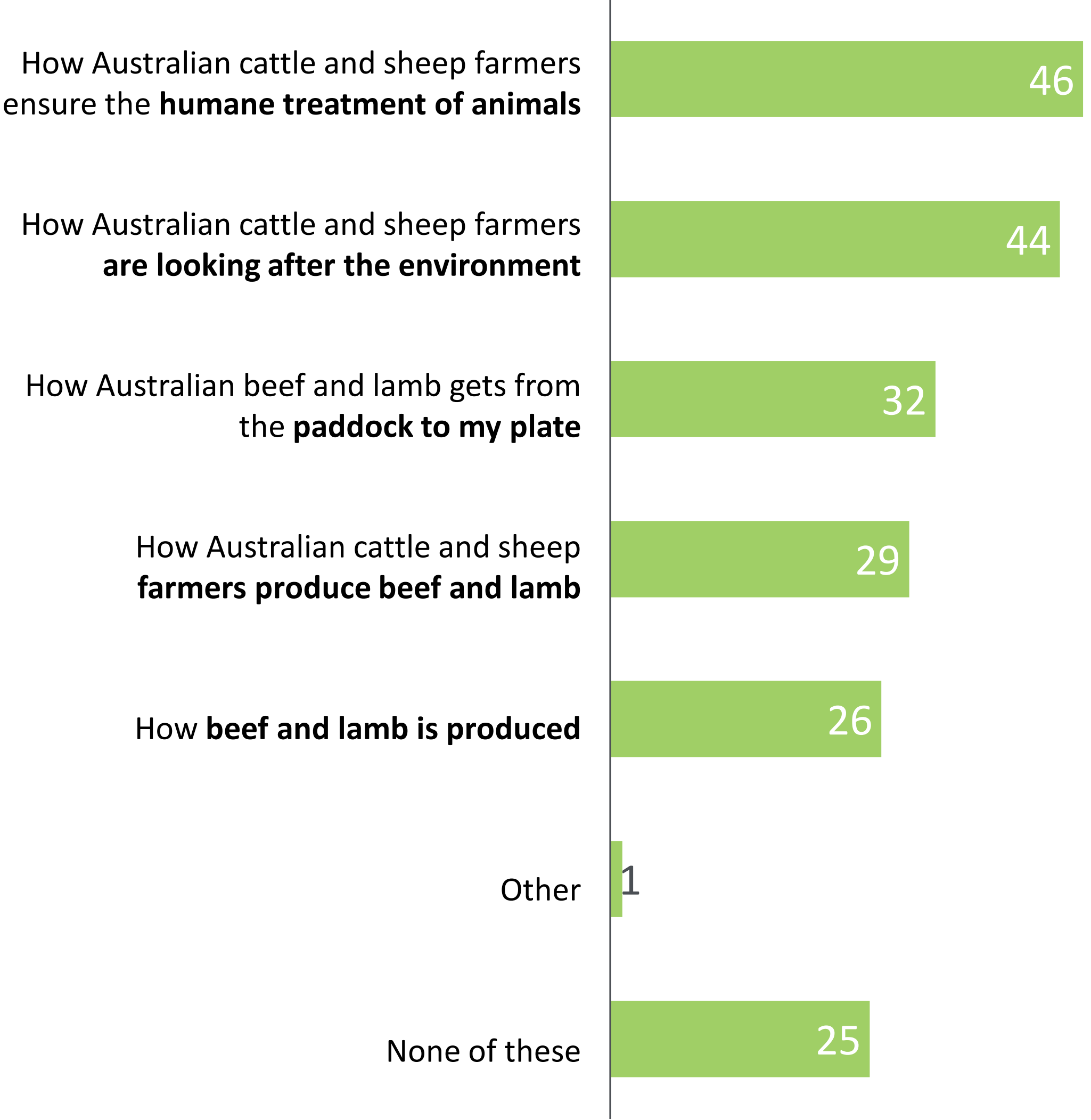
48% (or 1 in 2)
want to learn more
about our industry



72% (or 7 out of 10)
think kids should be
learning about the
industry in schools

People are most interested in learning about how farmers ensure the humane treatment and look after the environment

Interested in learning more about (%)



■ Jun'22



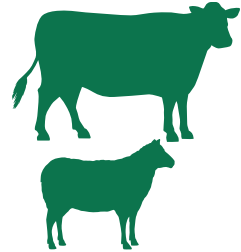
F1B Which, if any, of the following are you interested in learning more about? Base: Total n=1506

Higher levels of industry knowledge is linked to better perceptions

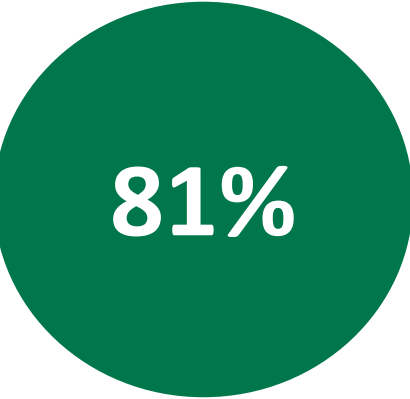
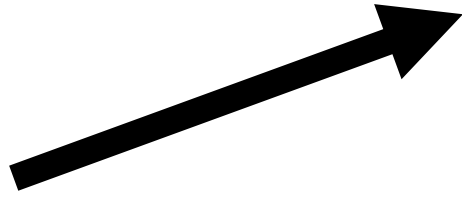
Total metro
Australians

Of those feeling knowledgeable
about AU beef or lamb industry

% of those who agree with the statement



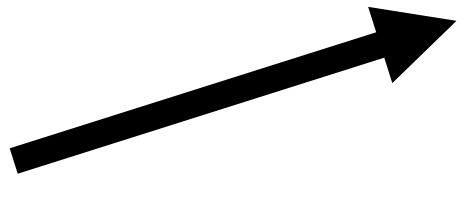
I feel good about the production of beef in Australia



+21



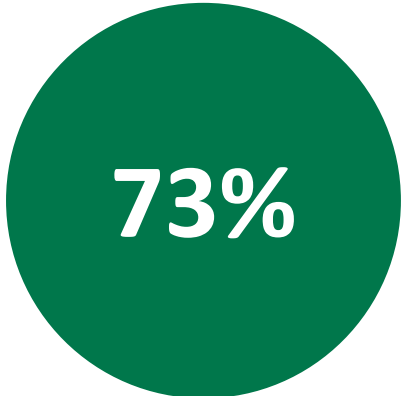
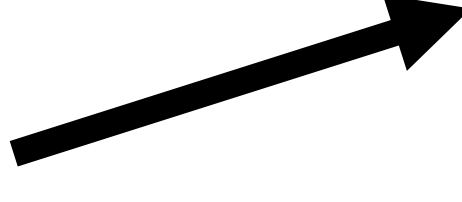
Australian cattle producers care about the environment



+18



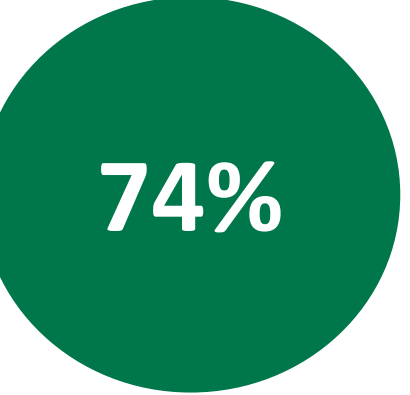
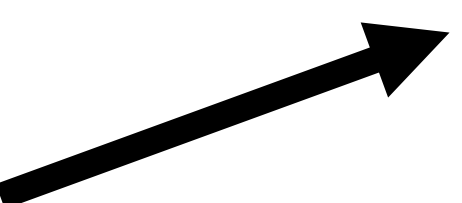
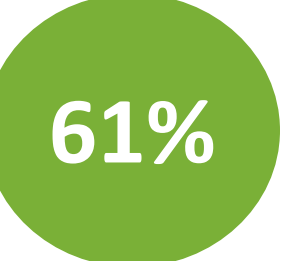
Australian cattle are farmed and raised in a humane manner



+18



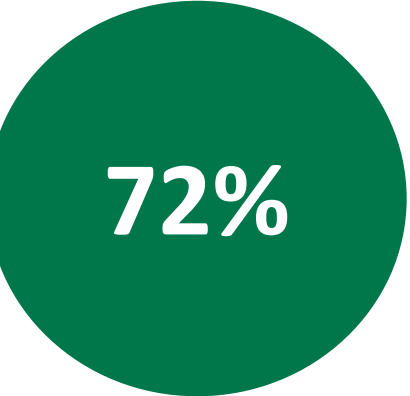
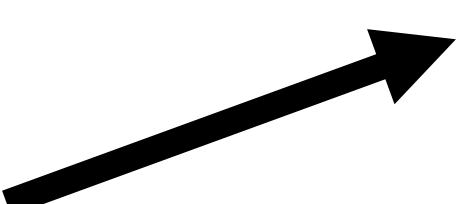
Australian cattle producers make a positive contribution to society



+13



Australian cattle producers are ethical and trustworthy

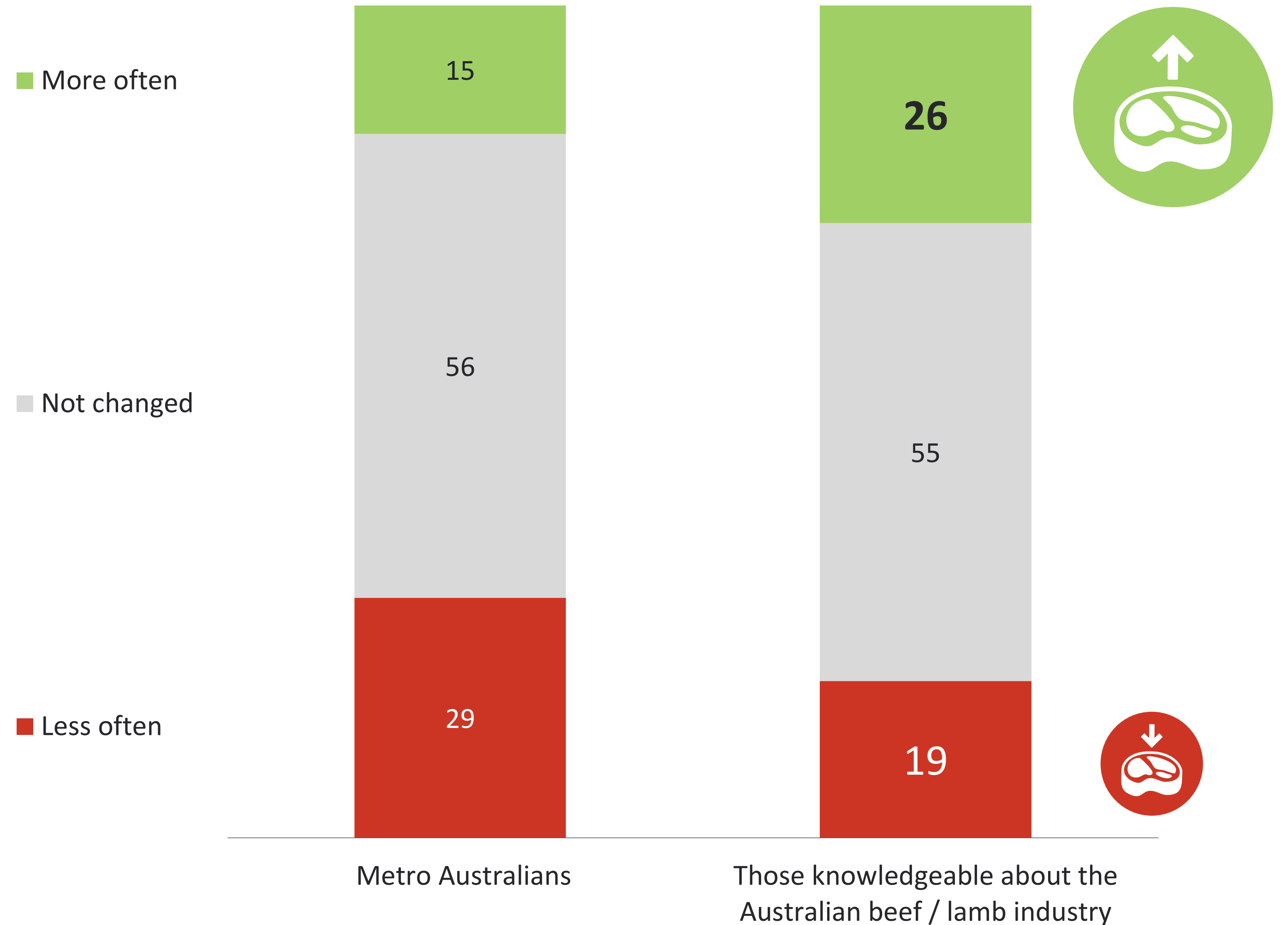


+18

Higher levels of industry knowledge

- ✓ are more likely to have increased their red meat consumption vs. 12 months ago
- ✓ with fewer having reduced their consumption vs. 12 months ago

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





*Most metro Australians
trust the Australian beef industry*

61%

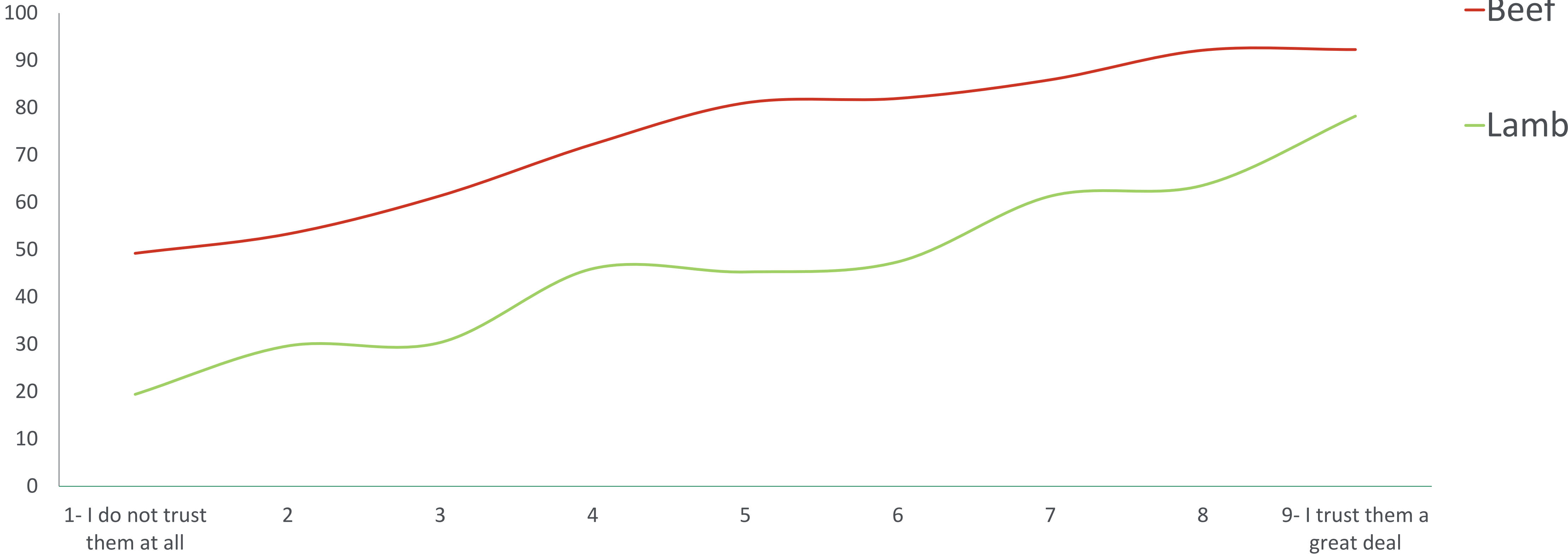
trust the Australian beef industry

60%

trust the Australian sheep industry

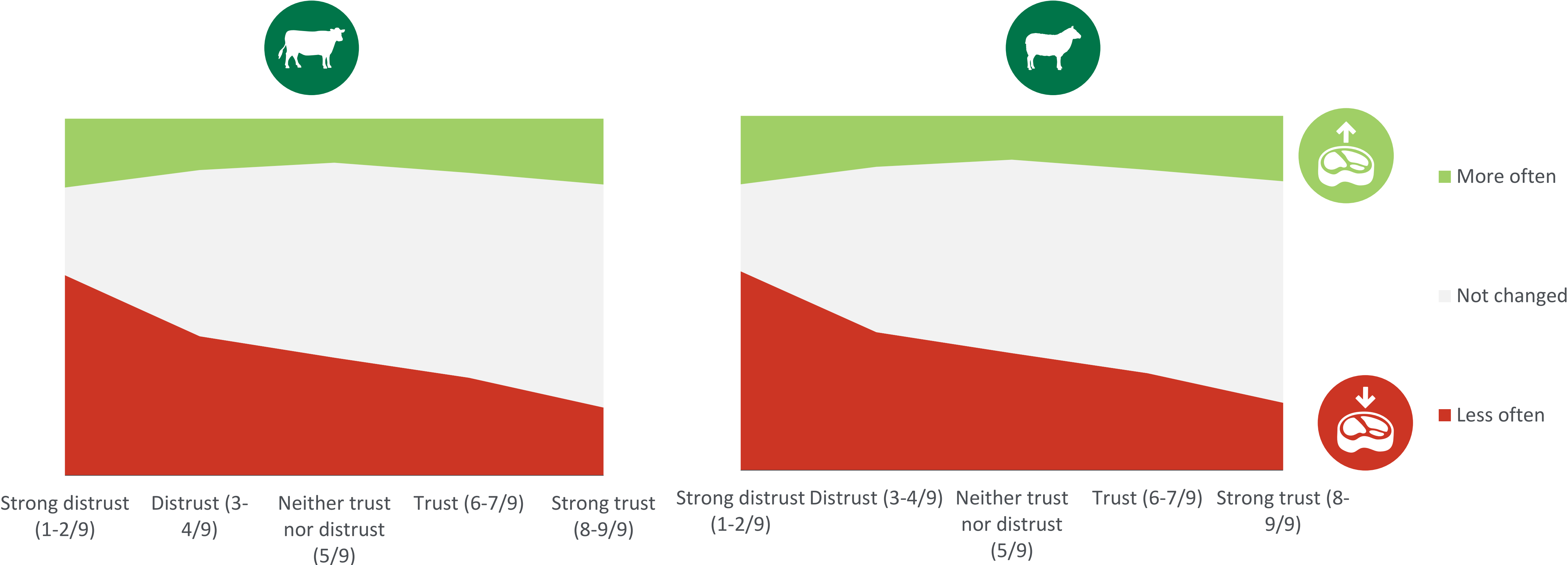
Higher trust in industry is linked to higher consumption

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



Lowered red meat consumption is also linked with weakened trust in the industry

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



Continuing to build trust in our industry



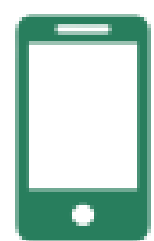
Tell our story by aligning with community *'shared values'*. This will help increase awareness of the industry's ethical practices and environmental action, and likely help **build trust and understanding** of the industry.



Raising awareness amongst the community on the industry's ambition to be carbon neutral will likely **improve consumer perceptions towards environmental stewardship** and overall industry perceptions.



Informing the community of the **health and nutritional attributes** of red meat may encourage consumers to increase red meat consumption and help alleviate concerns amongst red meat reducers.



Internet and digital engagement most likely method in which to communicate, provide information to build knowledge of our industry

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