

# Consumer Sentiment Research

## Key findings

### 2021

## Pollinate:

Online survey  
of n=1510

main grocery  
buyers and  
main meal  
preparers

aged 18-64

in metro  
Australia



# Key insights for 2021

- Overall **red meat consumption** is stable
- **Drivers and barriers** to red meat consumption are gradually changing
- **Health** is polarising, but key to drive consumption of red meat
- Red meat **industry perceptions** are stable
- **Knowledge of the industry** influences perceptions towards red meat
- **Farmers** are amongst the most trusted professions in Australia
- Community communications: continue to **focus on raising knowledge**



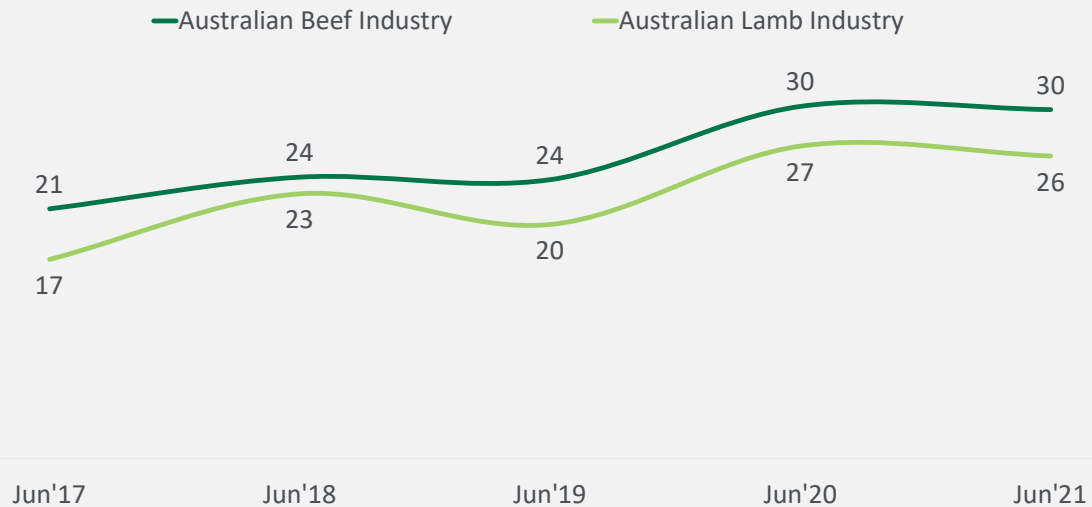
# Industry Knowledge

## Perceived knowledge of both the Australian beef and lamb industries is increasing over time

1 in 3

Australians feel they have good knowledge of the beef and/lamb industry

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



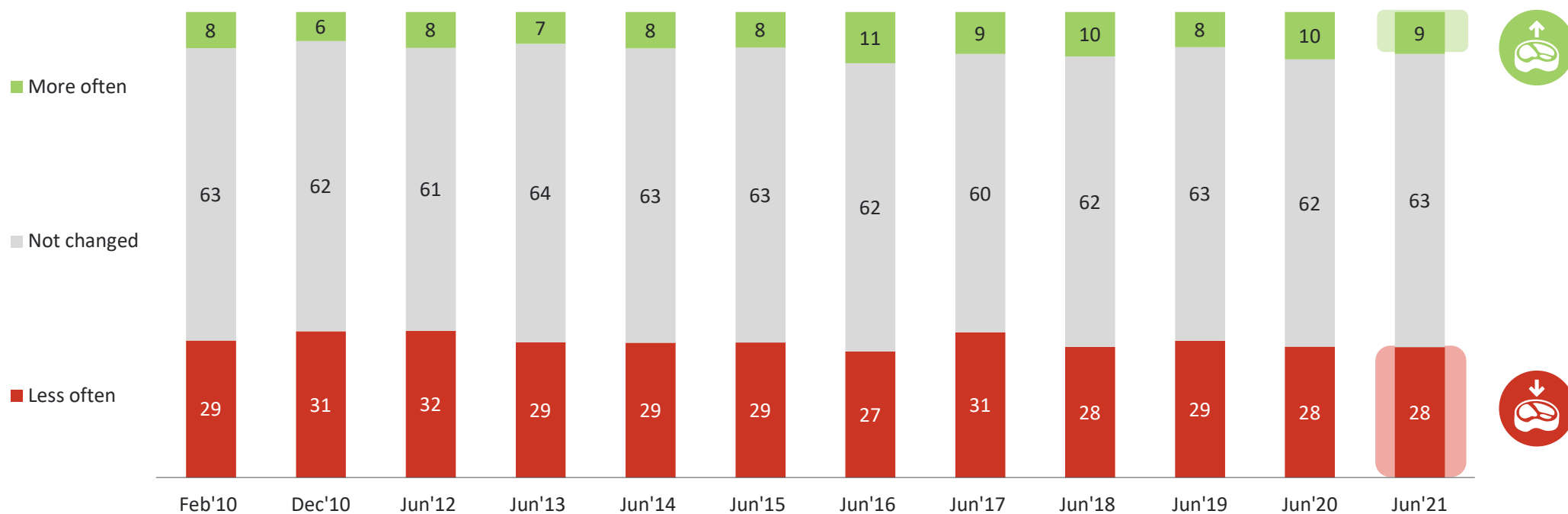




# Consumption

# Overall red meat consumption remains relatively stable

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

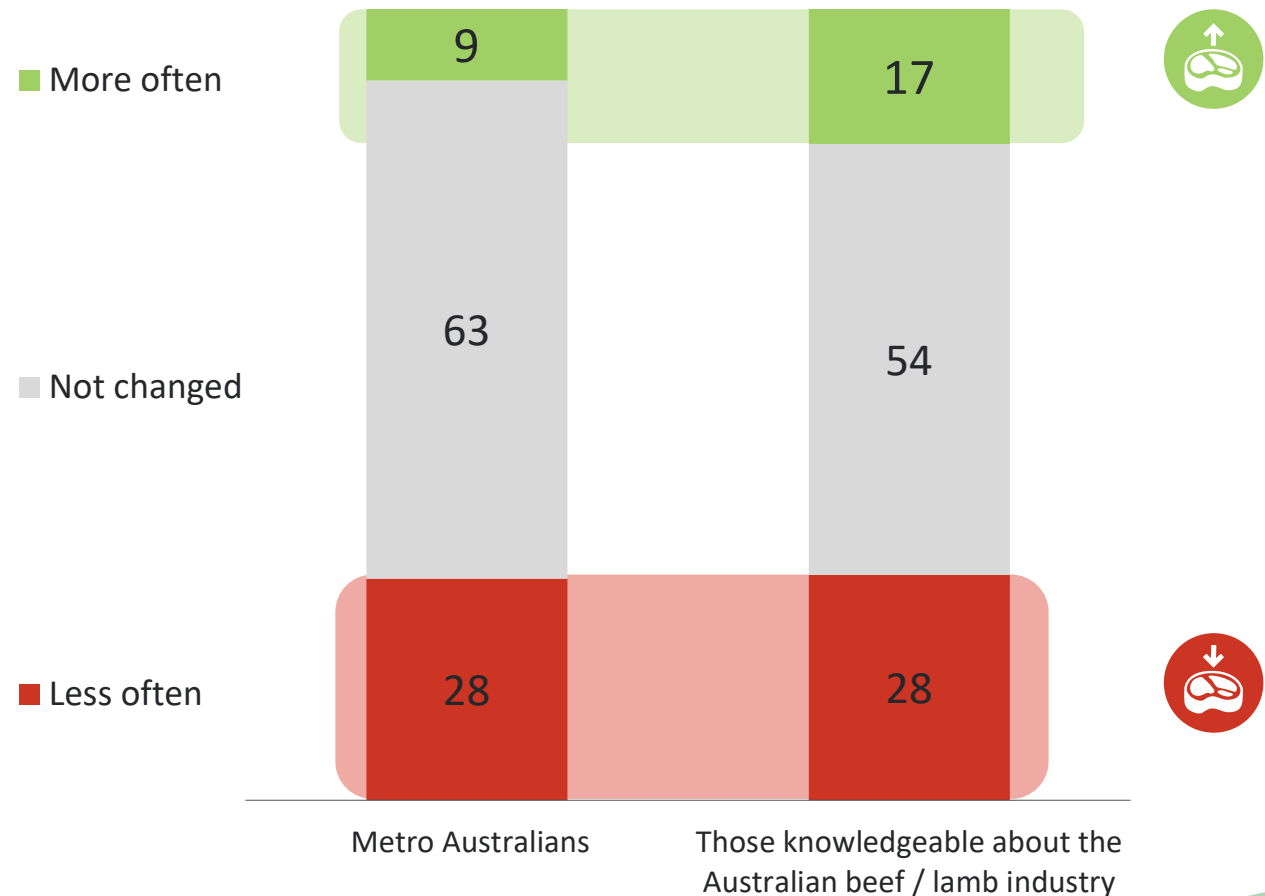


A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago? Base n=761/ 1000/1002/602/1001/1007/1389/1400/1425/1288/1434/1362

## Those with higher industry knowledge

...are more likely to  
have increased their  
red meat consumption  
vs. 12 months ago

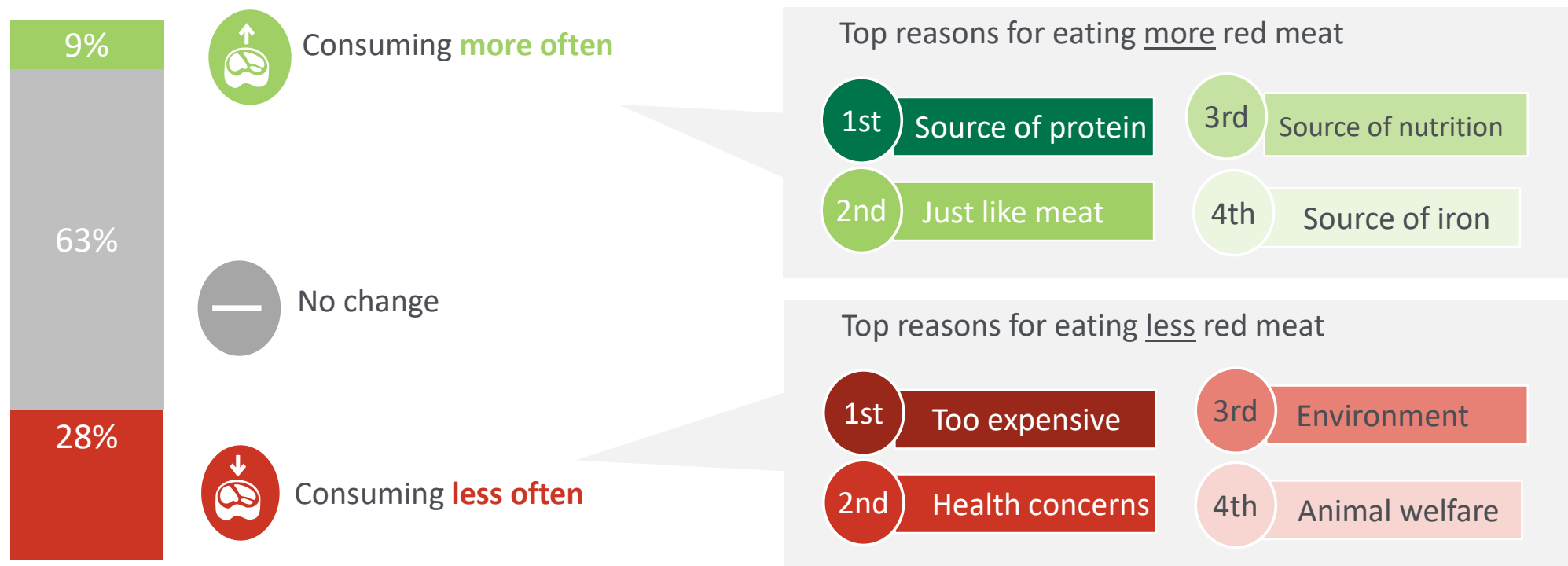
Relative red meat consumption,  
compared to 1 year ago (%) –  
Among meat eaters





# Motivations to change their red meat consumption

***Health** is polarising, but key to drive consumption of red meat*



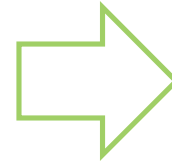
Relative red meat consumption vs. last 12 months  
Among meat eaters

Most claimed  
vegetarians still  
eat meat  
occasionally -  
**only 4% 'a true'  
vegetarian / vegan**

9%



Vegetarians  
in metro Australia



58%



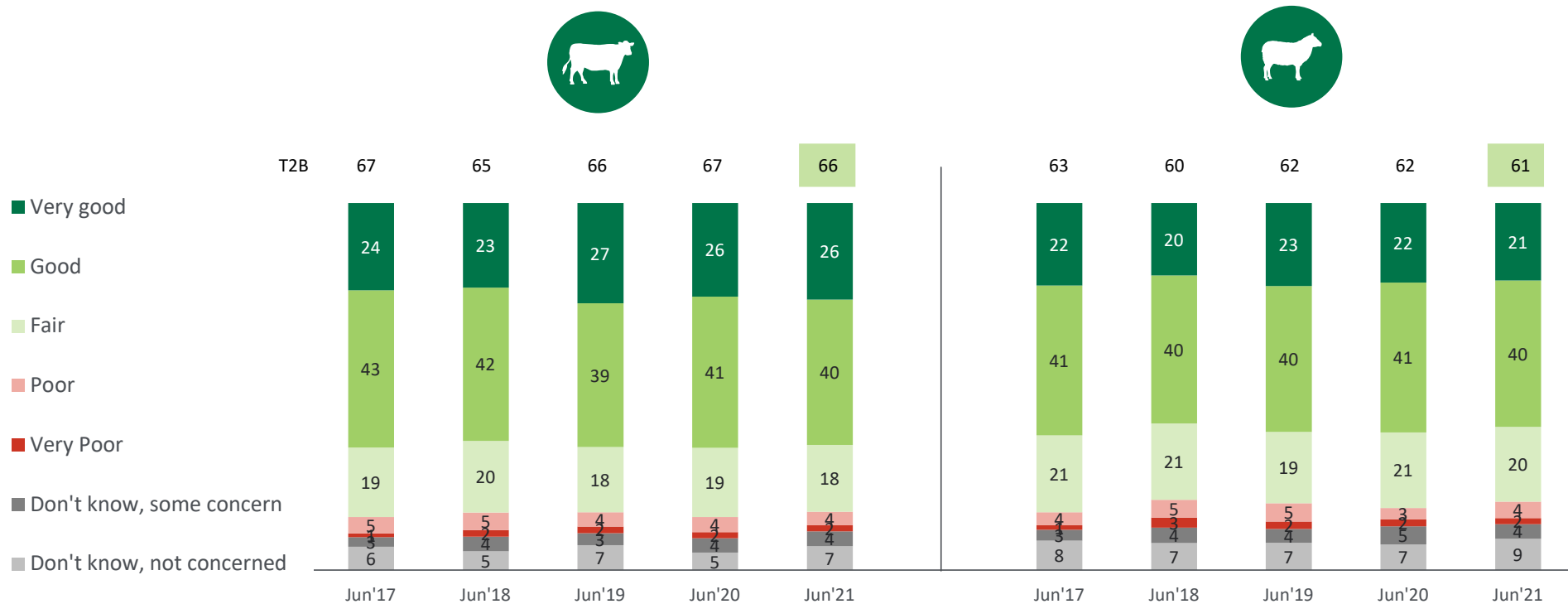
Vegetarians  
who also **eat meat**  
occasionally



# Consumer perceptions of the industry

# Consumer perceptions of the production of red meat are largely positive, and stable over time

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



# Higher perceived industry knowledge is linked to better perceptions

I have a very good knowledge and understanding of the...

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 or lamb in Australia

63%

76%

Australian cattle / sheep farmers make  
a positive contribution to society

63%

77%

Australian cattle / sheep farmers  
care about the environment

56%

72%

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

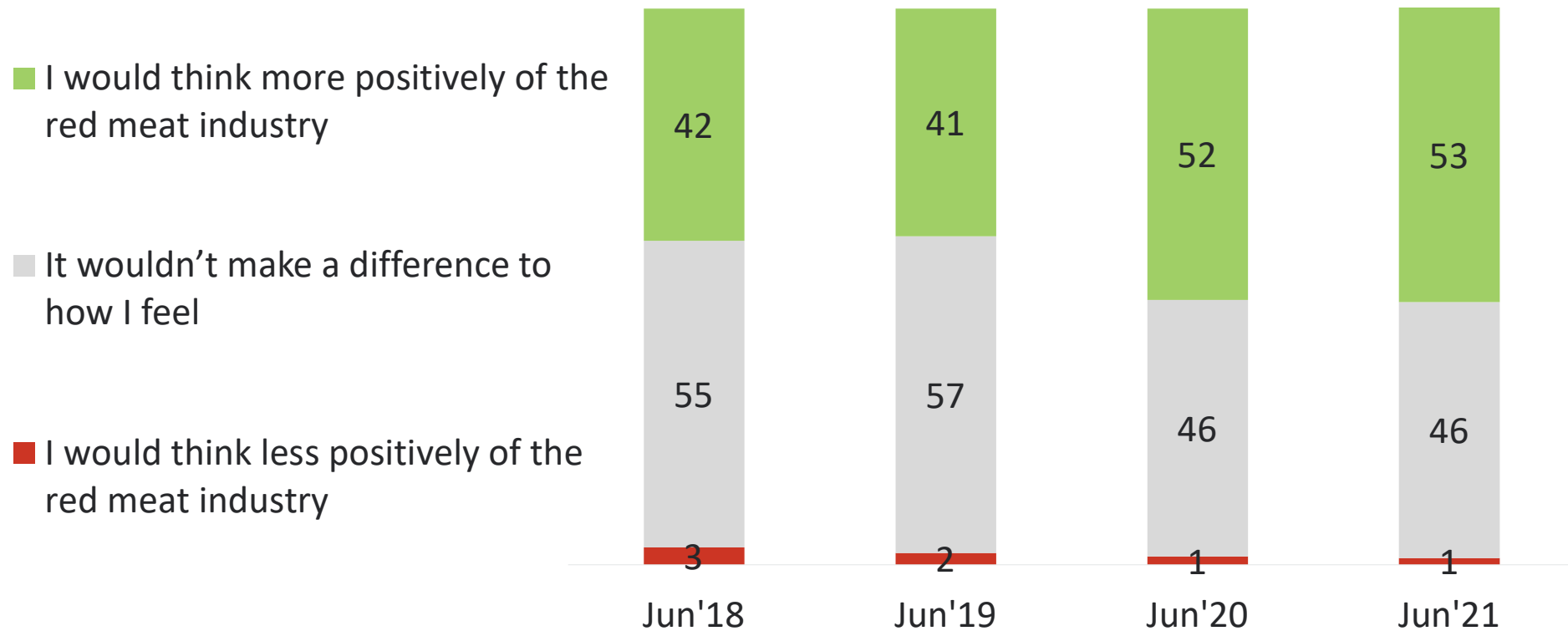
54%

70%



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

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



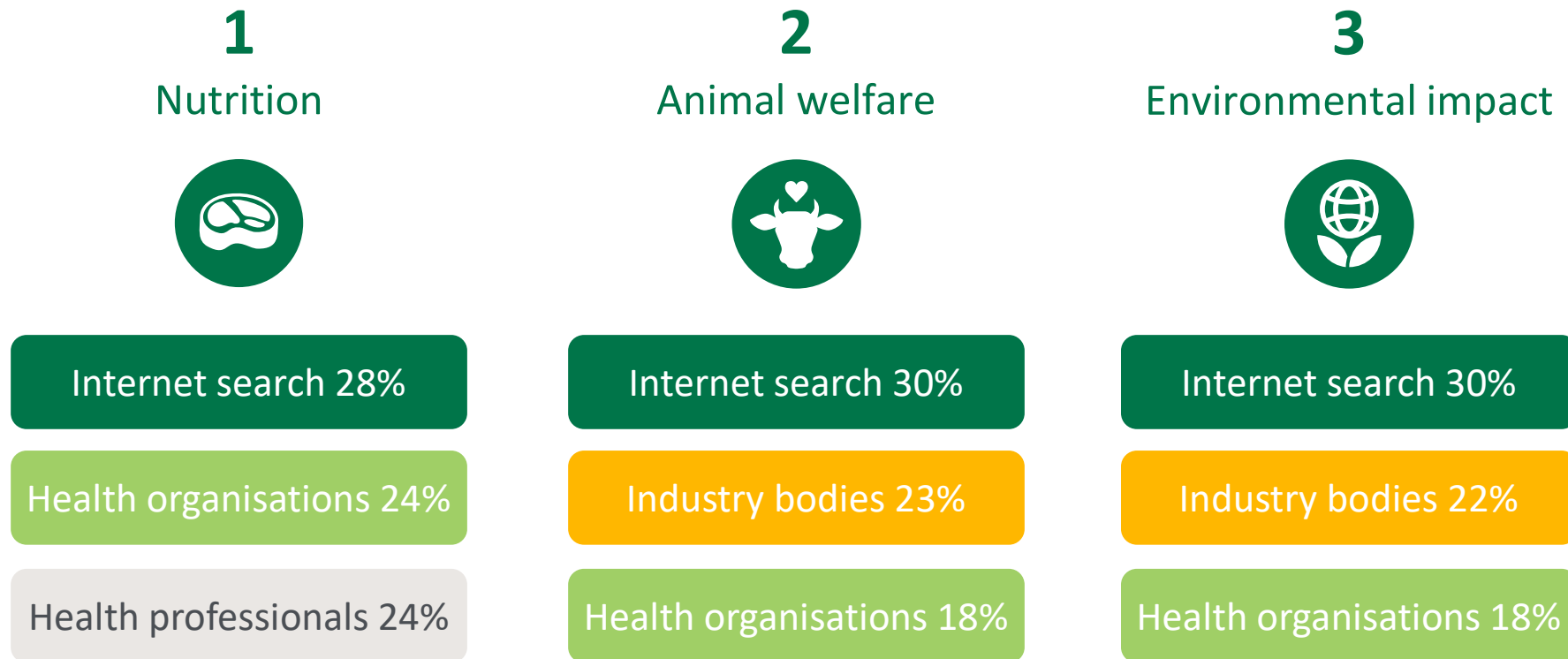
65%

Good knowledge



# Information Sources

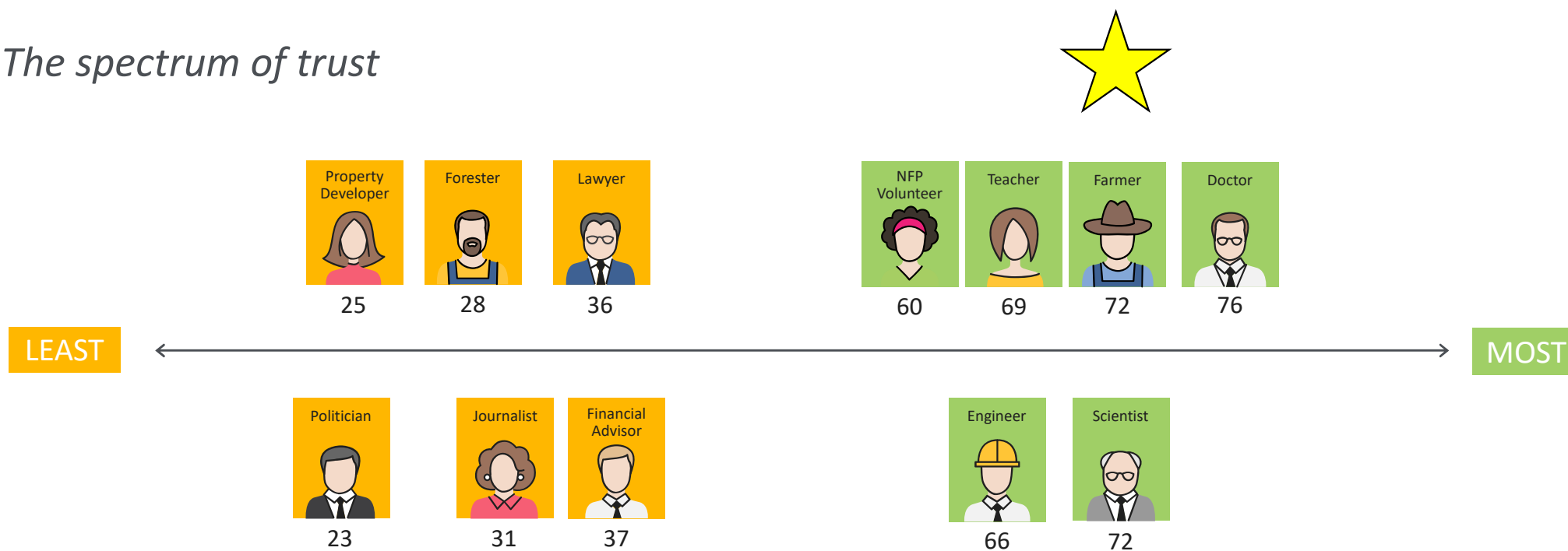
## Internet is the top source of information across key three topics



*Note:* People are thinking about fewer issues so significantly less people are searching for this information

## The spectrum of trust shows the highest level of trust is for evidence-based professions

*The spectrum of trust*



Doctors, scientists and our farmers are trustworthy

HPH4a. How much do you trust people in each of the following professions?

SLO1 - How much do you agree or disagree the below industries act in people's best interests? Base: Total sample, Australians aged 14-64 (Mar'21 n=1000)



# Summary



# Summary

## Drivers and barriers to red meat consumption are gradually changing

The portion of red meat reducers/increasers are stable

*For increasers:* Health benefits (notably protein and iron) are a key driver for 3 in 4 'red meat increasers' suggesting health is a strong message to drive consumption

*For reducers:* while price is still the top reason this year (marginally), it has reduced in prominence over the past 3 years with more people stating health reasons, the environment or animal welfare as reasons for reduction

Health is polarising – it is a consumption driver, however, is also a key reason for red meat reduction

## Knowledge increases positive industry perceptions, and most Australians want to learn more

Perceived industry knowledge has increased, however only 1 in 3 feel they have 'good knowledge'

Australians with greater perceived knowledge tend to have more positive perceptions of the red meat industry (potential advocates).

This includes better perceptions around the red meat industry's efforts around managing environment and animal welfare.

With increased industry knowledge, more likely to want to increase red meat consumption.

Farmers are trusted and perceived to contribute positively to society

## Implications for community communications

Utilising farmers to boost industry knowledge of the paddock to plate story will likely help build trust and understanding of the industry.

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

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

Internet / digital engagement most likely method in which to communicate, provide information

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