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Can we shift consumer sentiment? Australian consumer insights 2024

Howard Parry-Husbands
(CEO Pollinate)



Agenda

1. The positive trends in beef consumption
2. Vegetarians, vegans and eating meat: challenge your perceptions!
3. How a changing Australian society, culture and values impacts on beef consumption
4. Trust in farmers remains high
5. The issue around commitment to sustainability
6. Morality matters most to social license
7. The dangers of hot herbal tea, guilt fatigue and Make every bite count
8. Summary and conclusions

Sample profile May 2024

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

Ongoing since 2009.

Gender

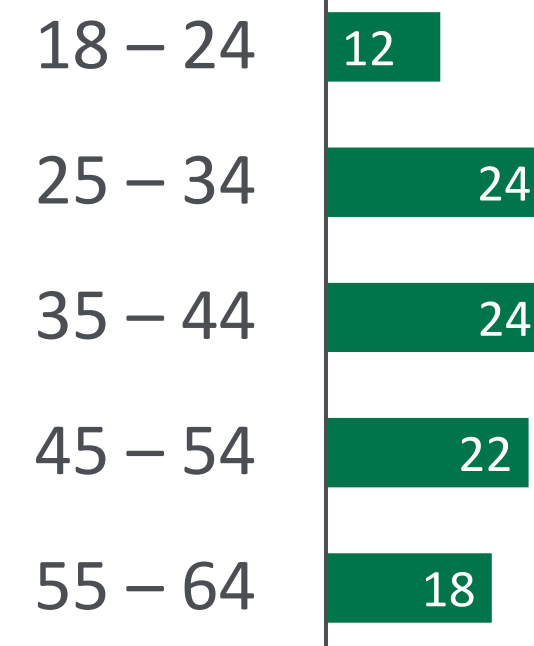


Female
62

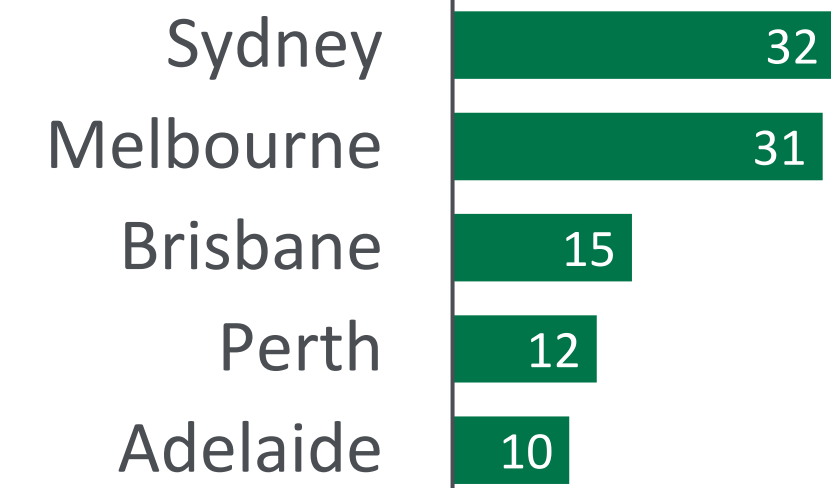


Male
38

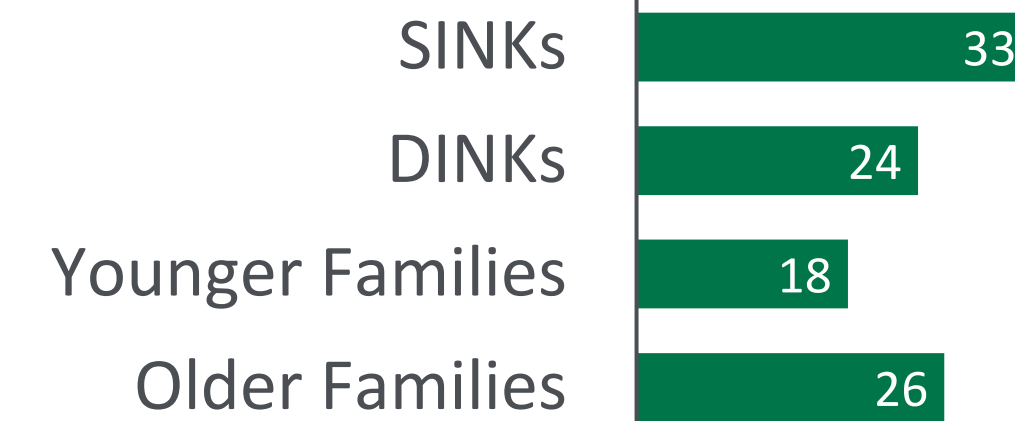
Age



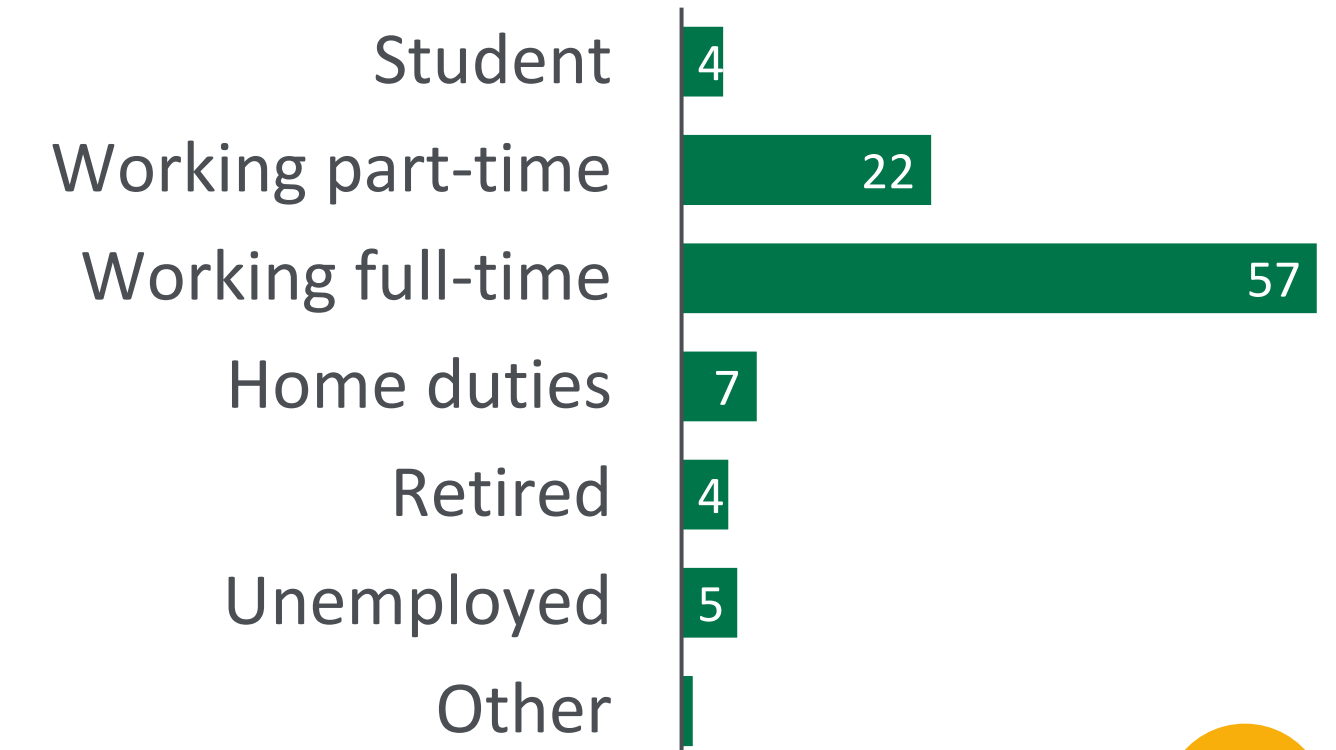
Location



Life stage



Employment

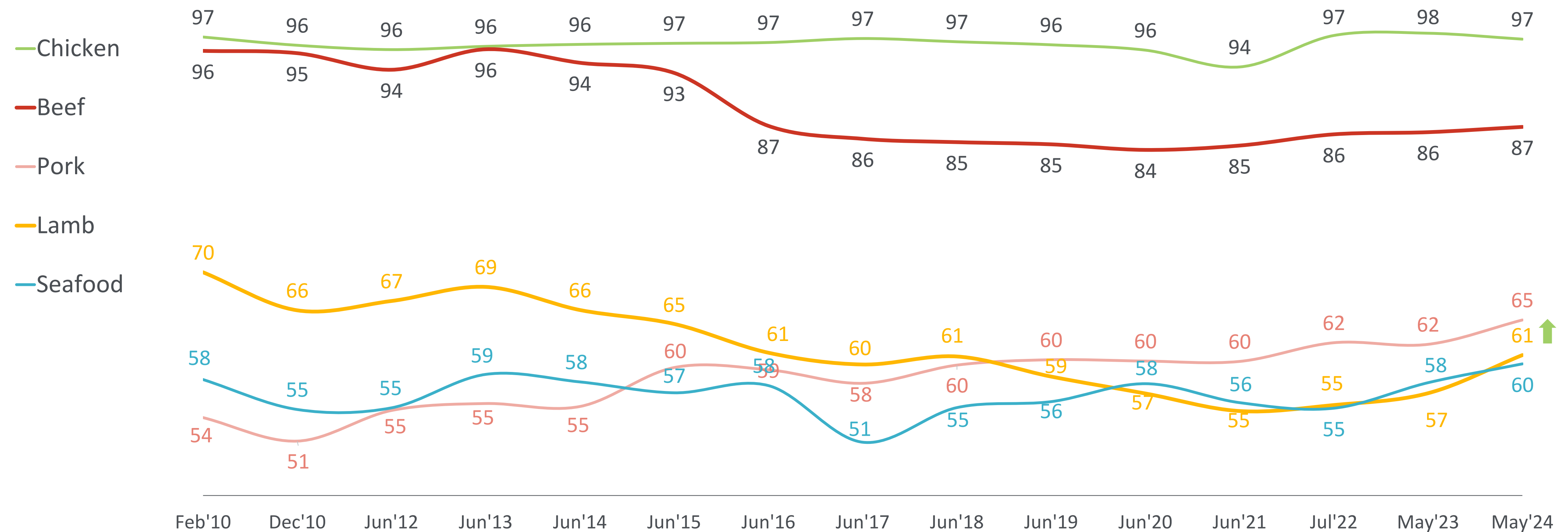




1. The positive trends in beef consumption

The amount of Aussies that claim to eat beef is stable

Buy and eat regularly (%) – Among meat eaters



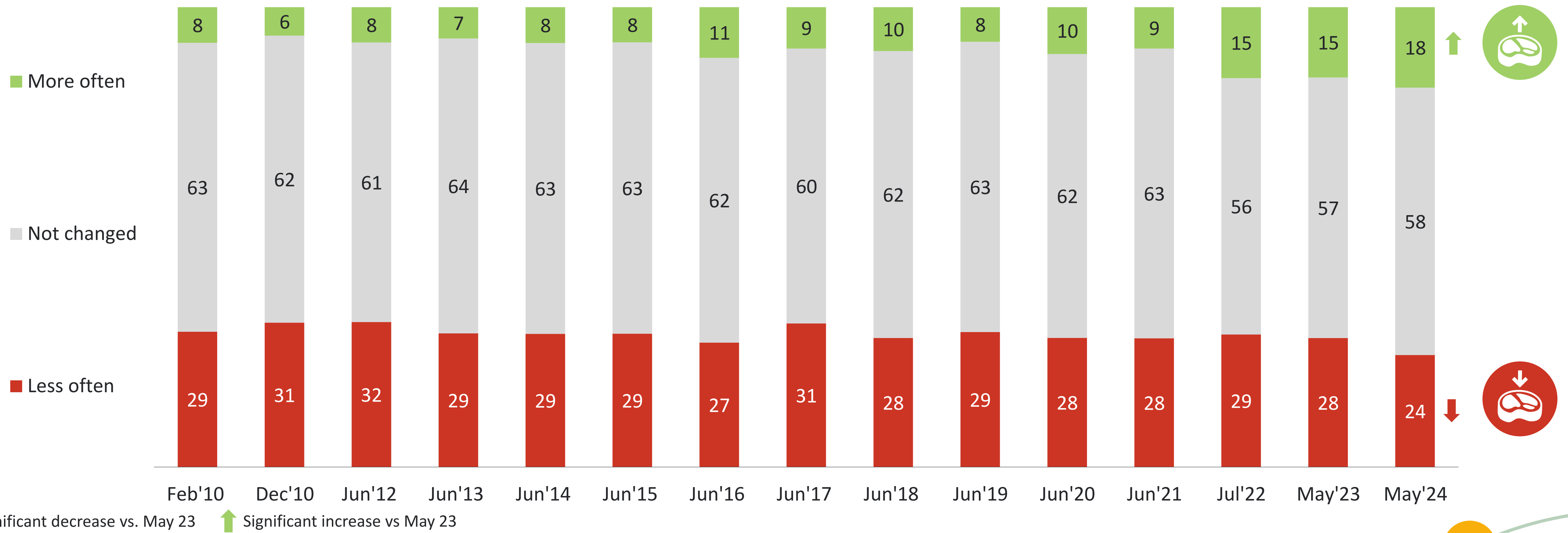
↓ Significant decrease vs. May 23 ↑ Significant increase vs May 23

A1. Which of the following do you buy and eat regularly at home? Base Those who eat meat (n=602-1434)

Note: Expected value is shown for June 2019 to ensure comparable data across waves, to account for methodological changes applied to that wave of the research

The proportion of red meat increasers is the largest since tracking began, with less than a quarter reducing

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

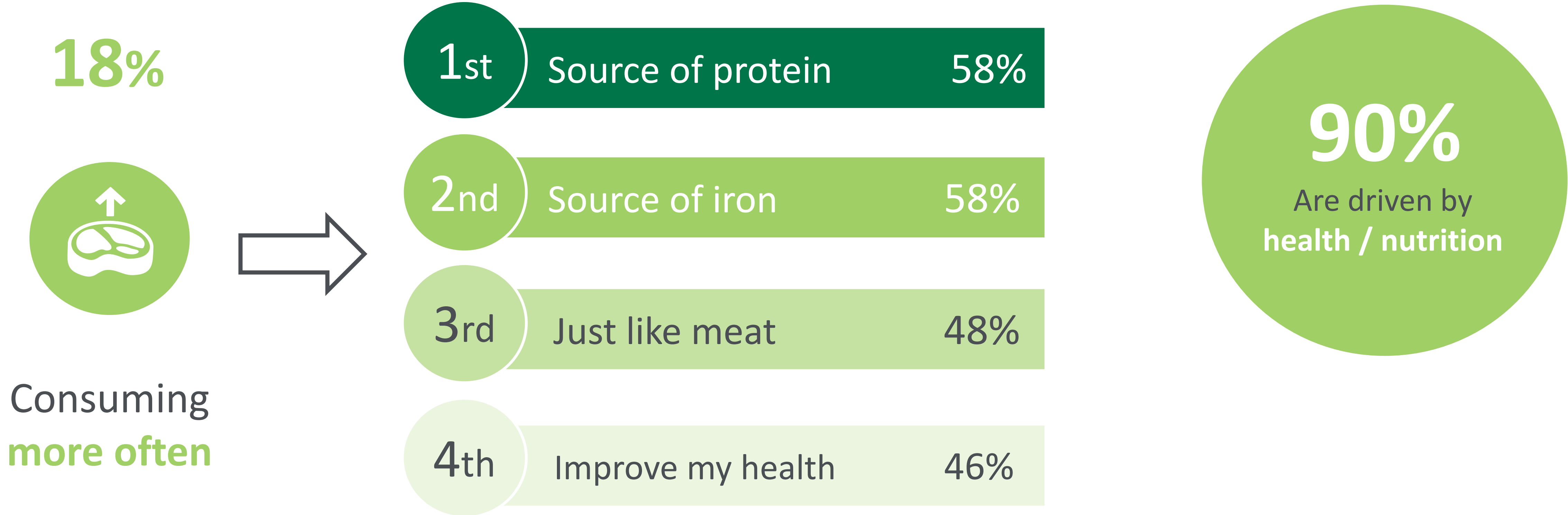


A7 Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago?

Base n=(n=602-1425)

The top reasons for increasing red meat consumption revolve around health and nutrition, particularly 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 (May'24 n=248)

“I just like meat”

as a reason for eating red meat more often has increased the most over the last 12 months

Up from 41% to

48%

In times of austerity is red meat the affordable treat that we've been missing?



Red meat reducers can't afford to care any more?

Environment and animal welfare
concerns as reasons for reduction

down from 33% (2021) to

9%

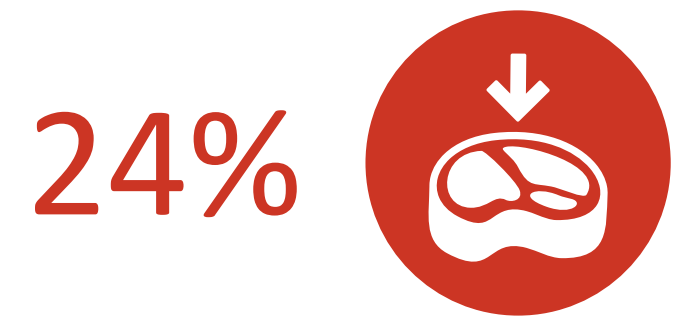
'Too expensive' still 58% (30% 2021)



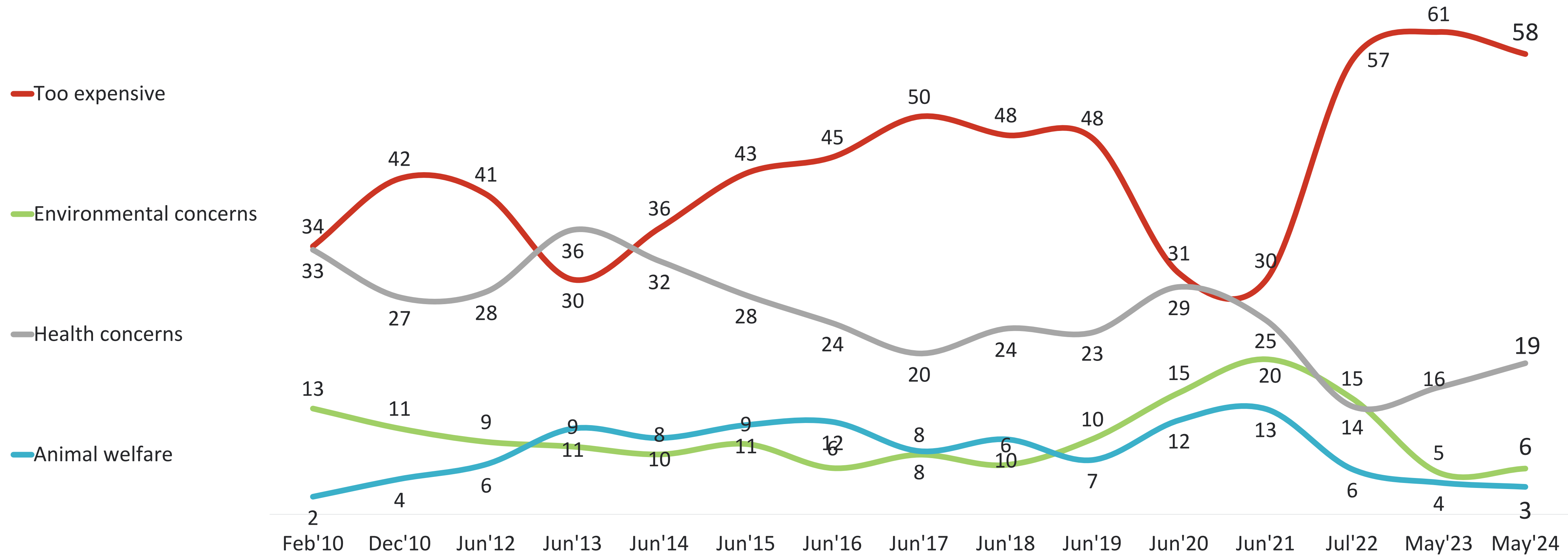
BEEF PRICES

NEWS

Cost as a driver to reduce consumption remains very high, but health concerns are trending upwards



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)



2. Vegetarians, vegans and eating meat...

Only 5% of Aussies identify as vegetarians, consistent with last year

5% 

Are you a vegetarian? (%)



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

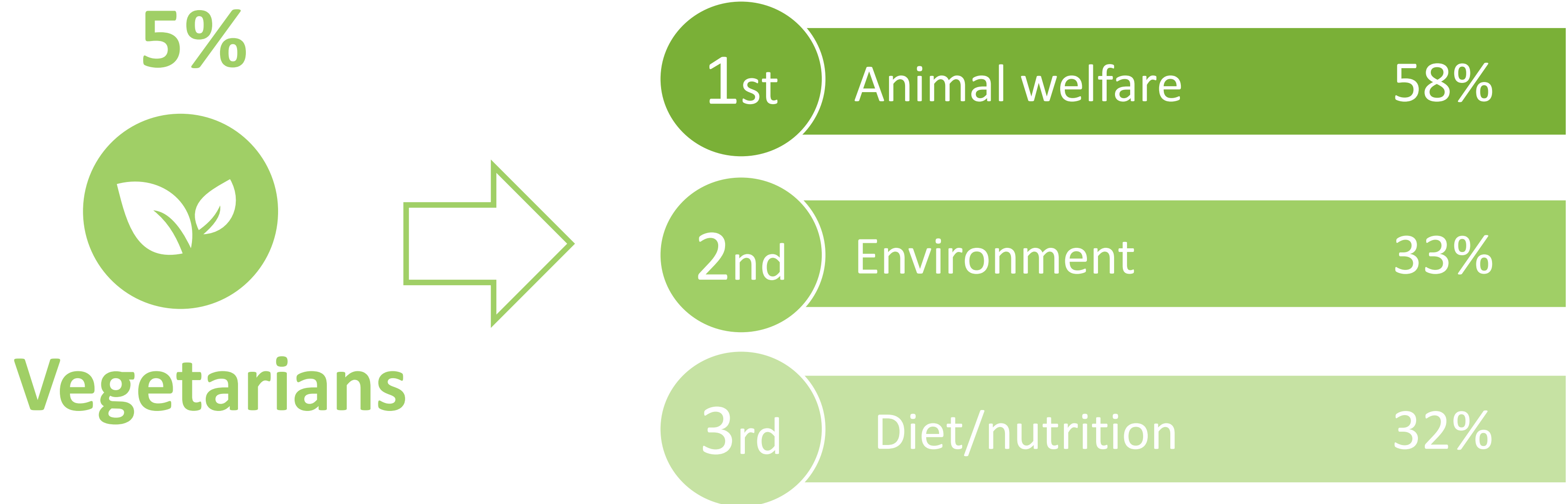
S7. Are you a vegetarian? Base. Total sample by wave n=1500-1556

True Vegetarians/Vegans represent a small proportion of the population



Animal welfare, environment and health are the key drivers of vegetarianism

Top reasons for not eating meat (%) | Vegetarians

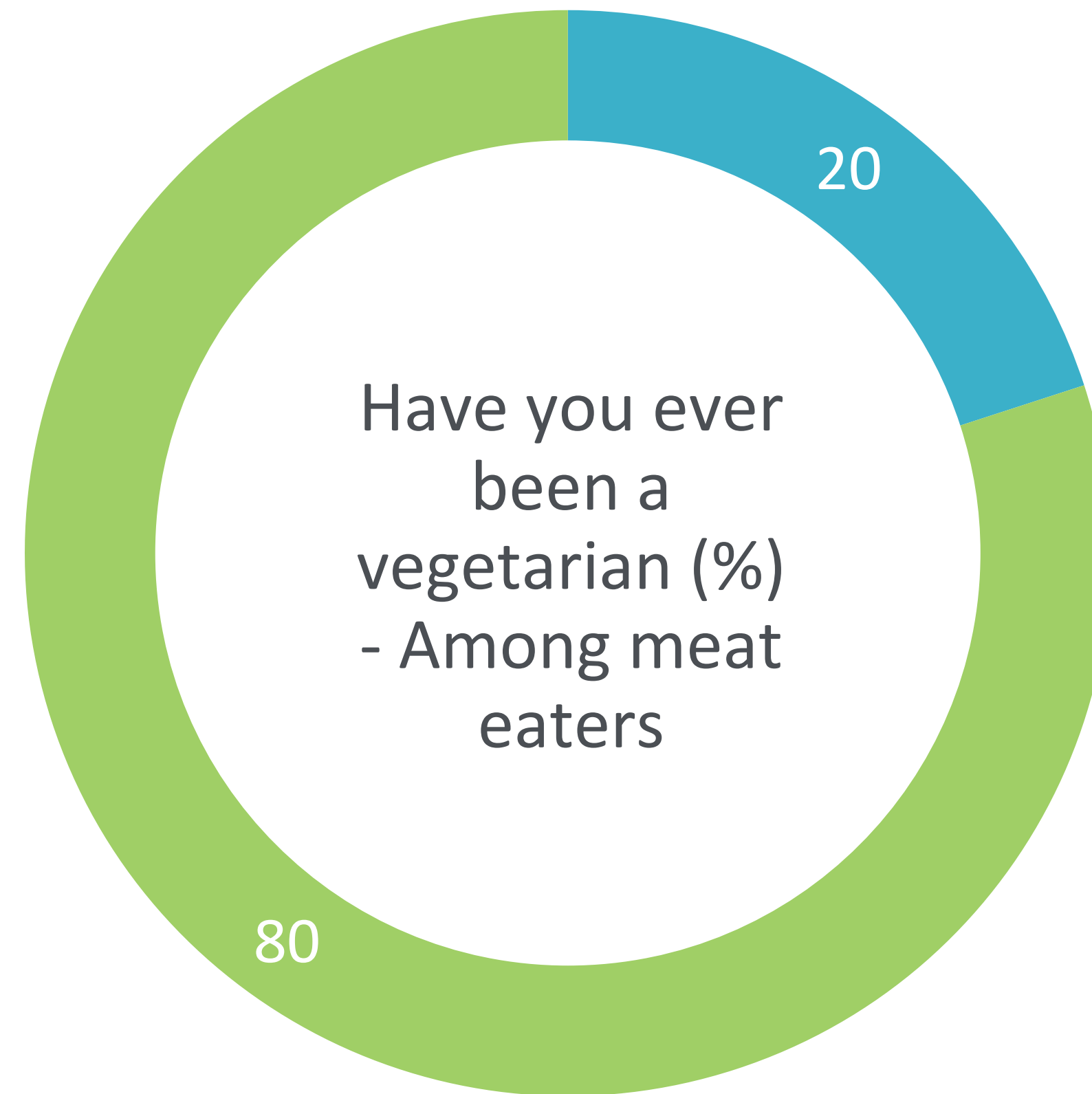


↓ Significant decrease vs. May 23 ↑ Significant increase vs May 23

20%



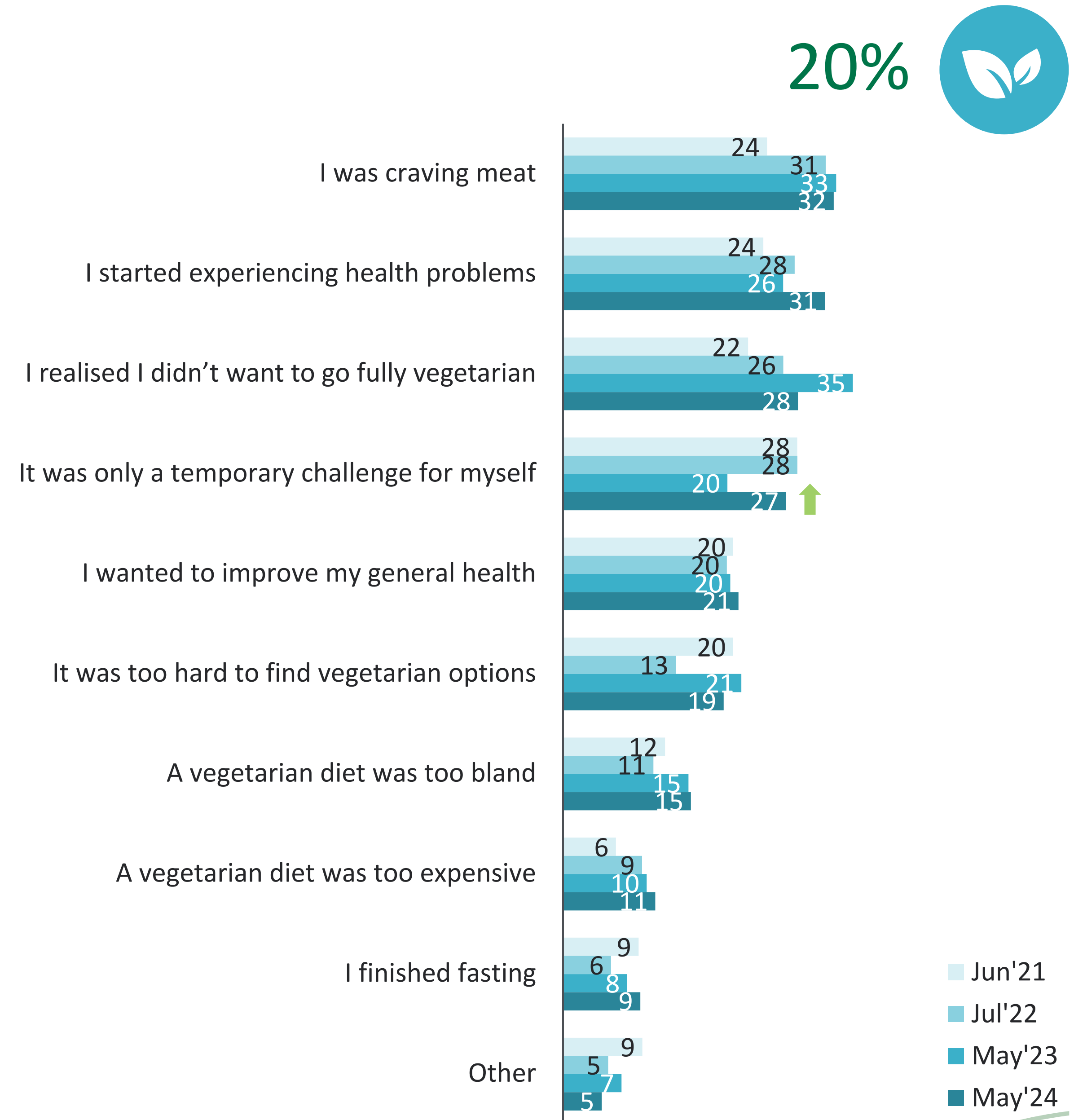
**1 in 5 meat eaters
have been a
vegetarian in
the past**



■ Yes ■ No

Cravings for meat and health are consistently the main reasons why ex-vegetarians start eating meat again

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



20%



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





3. Impacts of changing society on beef consumption

More likely to be increasers if:

- Asian cultural background: 20%, compared to European (13%)
- Born in China: 28%, compared to UK (18%)
- Those with both parents and themselves born in China: 26%

Cultural diversity appears to be a driver of increased red meat consumption



Reasons for decreasing red meat consumption **less due to cost** for Asian cultural background

...but **more** for health concerns



Reasons for increasing red meat consumption differ by culture:

- Asian cultural background much more likely to be increasing because they just like meat (62%)
- Oceanic background because it's easy to cook (48%)



Red meat demand and the shift in societal values

We are beginning to see shifts in younger people and younger women eating red meat aligned with

the code for female 'beauty' shifting from 'skinny' to 'strong'

Has strong become the respectable face of skinny for young women?

A generation of Instagram stars and personal trainers are challenging old-fashioned notions of femininity, replacing images of thinness or fecundity with brute strength. Whether this is healthy is another matter

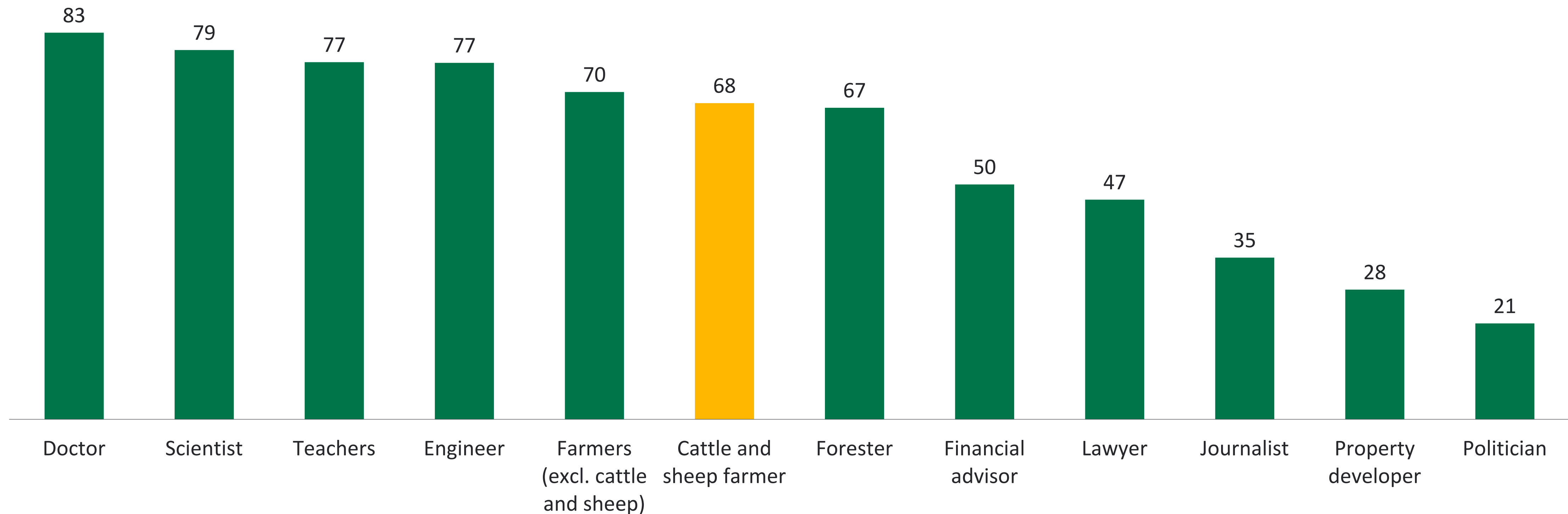




4. Trust in farmers remains high.

Trust of cattle and sheep farmers is similar to adjacent professions (farmers & foresters) just behind the 'professions'

Trust to do what is right (%) – T4B

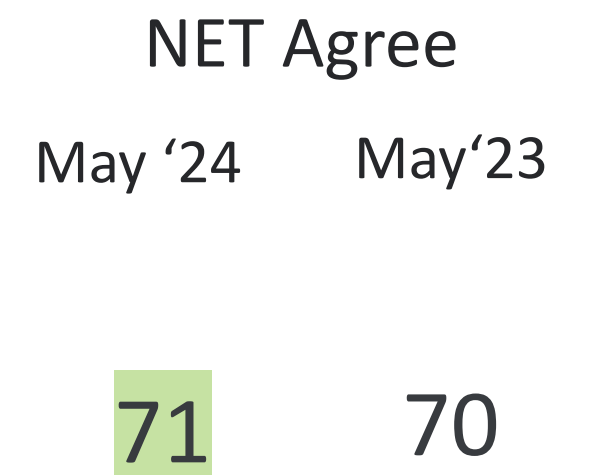


Nearly three-quarters trust producers to provide safe, nutritious and sustainable produce (ie beef)

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

71%

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



Attitudes towards red meat (%)



But just two thirds trust the industry to 'do what is right'

Trust in industry to do what is right (%)



64%

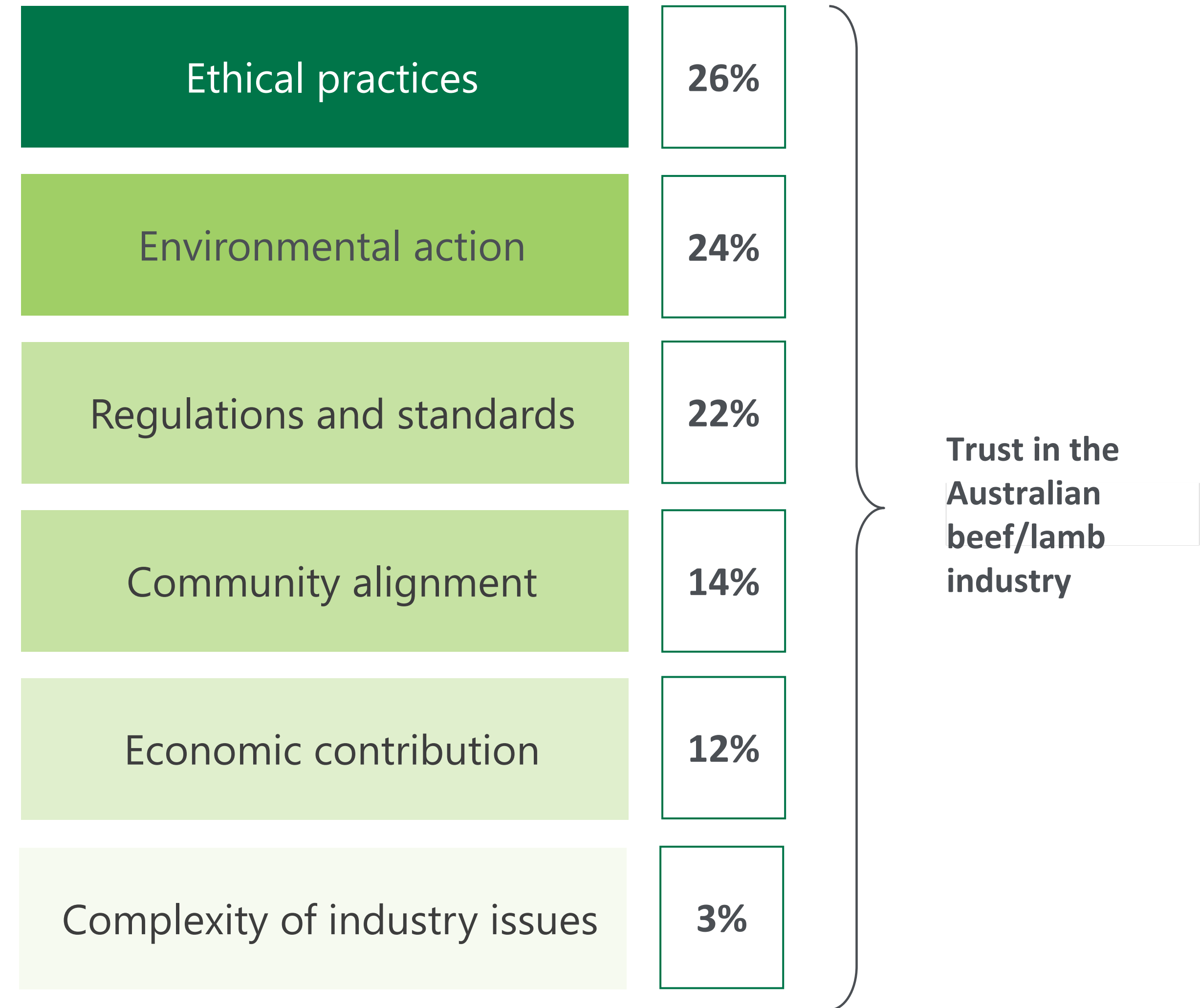


64%

The top drivers of trust are ethical practices, environmental action, and regulation

In 2023, Top 3 drivers were:
Environmental action 26%
Ethical practices 24%
Community alignment 19%

Drivers of industry trust (%)



Gen Z score the beef industry lower across all trust drivers



High / Low compared to Total

	Drivers of industry trust (%)	Metro sample avg. scores (%)	18-24yrs avg. scores (%)
Ethical practices	26%	54%	41%
Environmental action	24%	48%	41%
Regulations and standards	22%	52%	49%
Community alignment	14%	44%	43%
Economic contribution	12%	76%	66%
Complexity of industry issues	3%	62%	57%



5. Our Achilles heel: Commitment to sustainability

Sustainability is highly important to Australians

Importance of sustainability to you (%)



Top 3 box

91

92

91

Extremely important

18

18

19

Very important

37

36

36

Somewhat important

36

38

37

Not very important

6

6

5

Not important at all

3

2

3

Jul'22

May'23

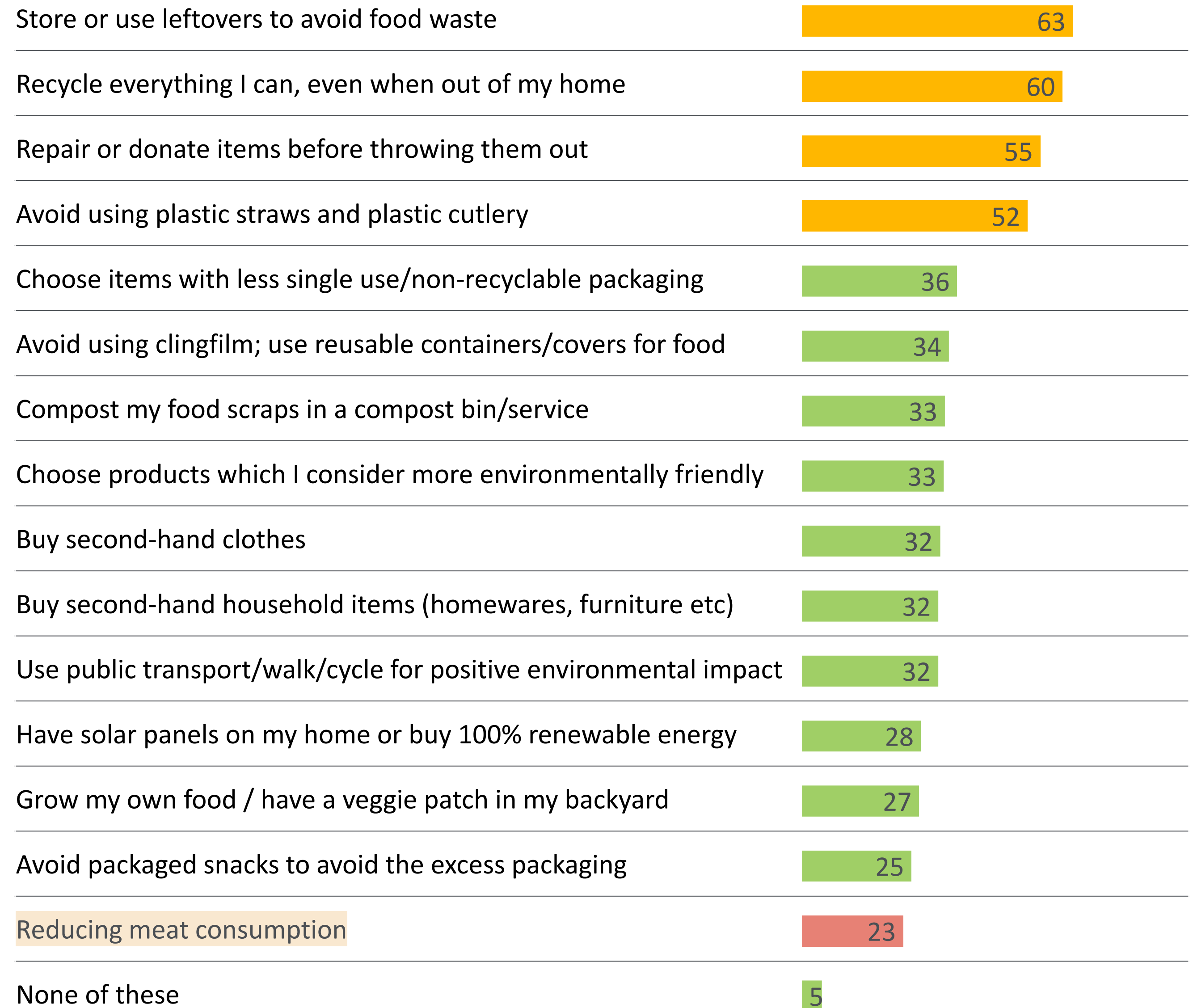
May'24

↓ Significant decrease vs. May 23

↑ Significant increase vs. May 23

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

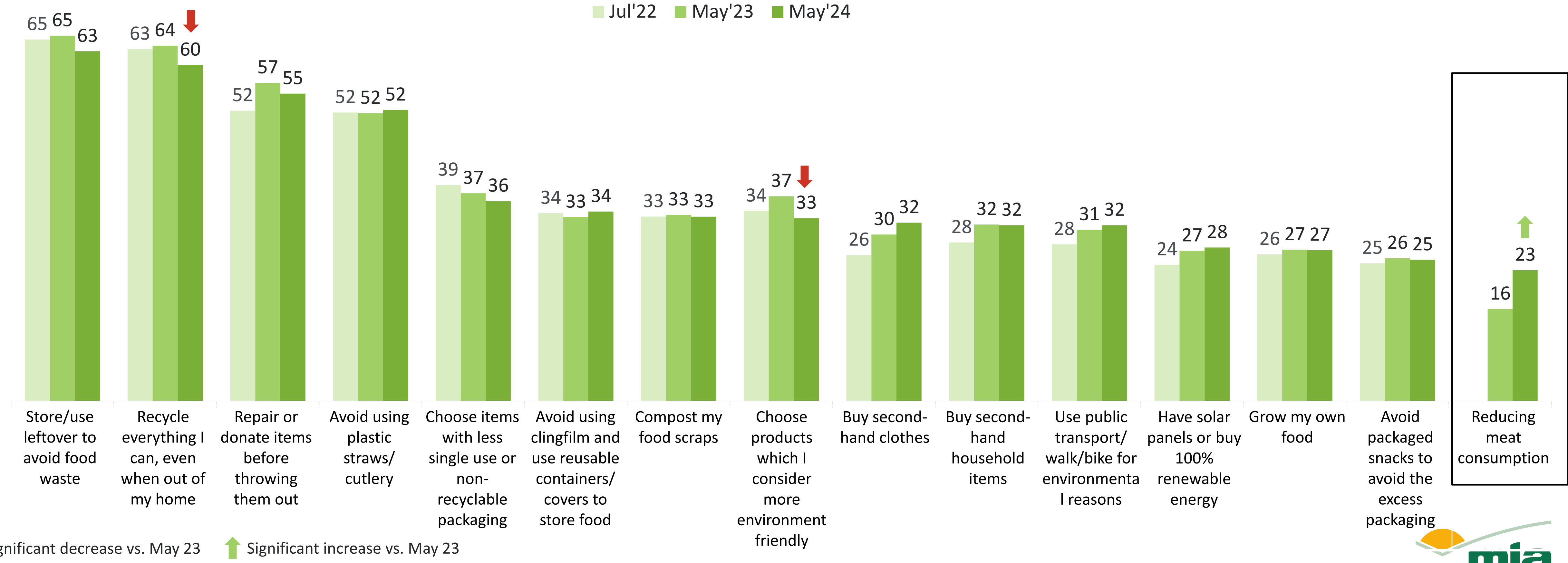
Sustainable actions you do (%)



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

Reducing meat consumption is now significantly more likely to be regarded as a way to act sustainably (up 7%)

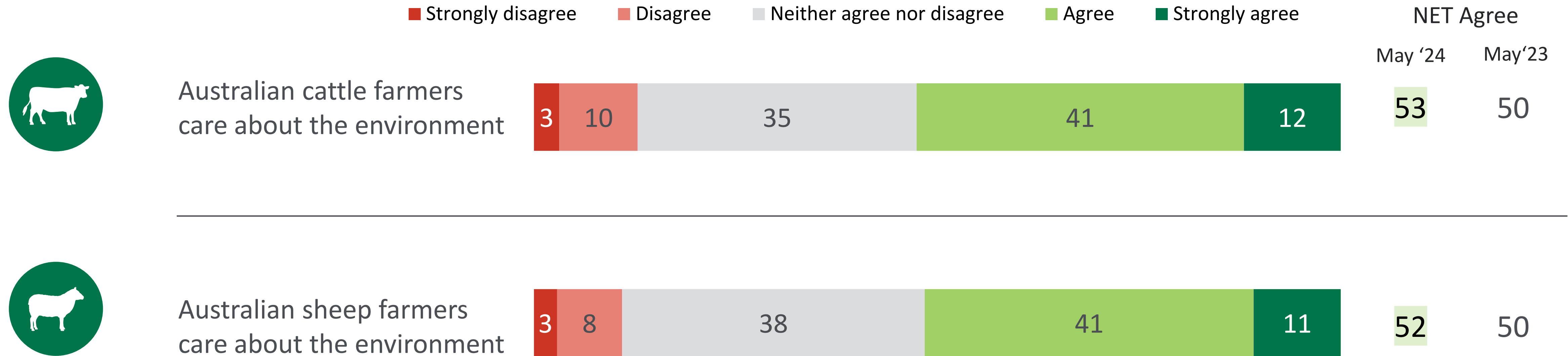
Sustainable actions you do (%)



B3. Which, if any, of these do you do? Base: Total Sample n=1506-1503

Just half agree that farmers care about the environment

Attitudes towards beef/lamb industry (%)

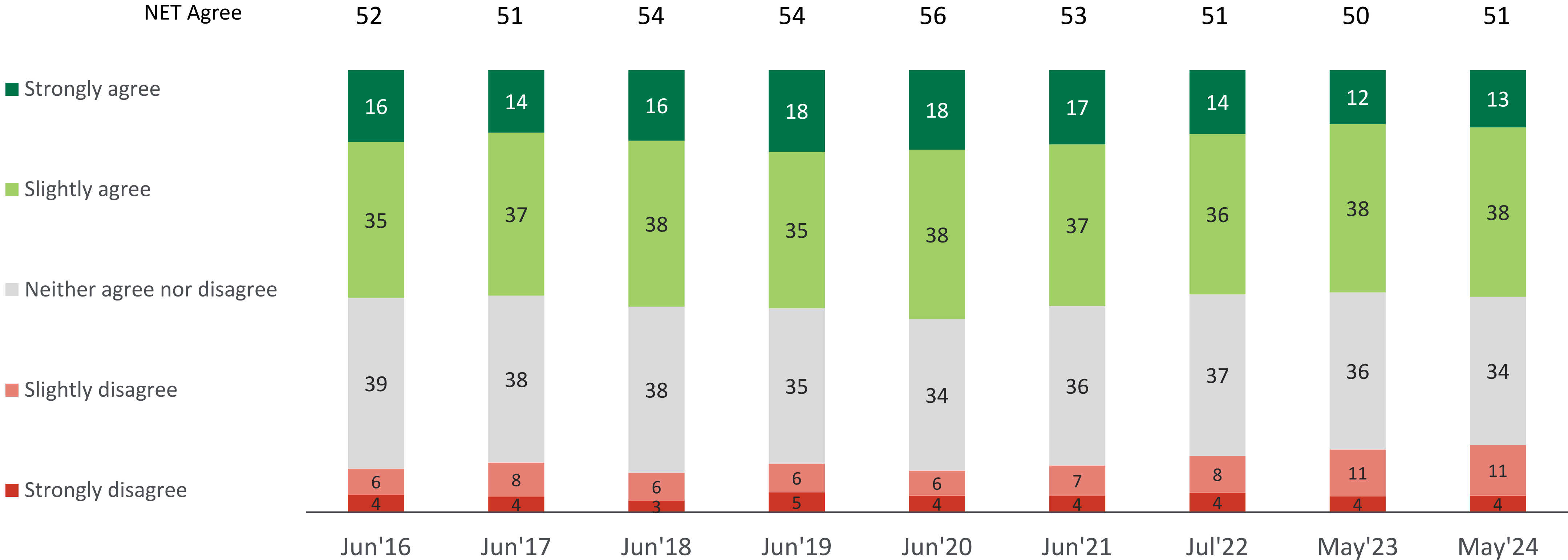


More than a third remain stubbornly on the fence.

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

Half agree that the industry is committed to sustainable production

‘Australian cattle and sheep industry is committed to sustainable production’ (%)



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



Around one in five are aware of the carbon neutral by 2030, and Good Meat initiatives

19%

Aware of CN30

“CN30 - An Australian red meat industry initiative to be carbon neutral (i.e. net zero greenhouse gas emissions) by 2030”

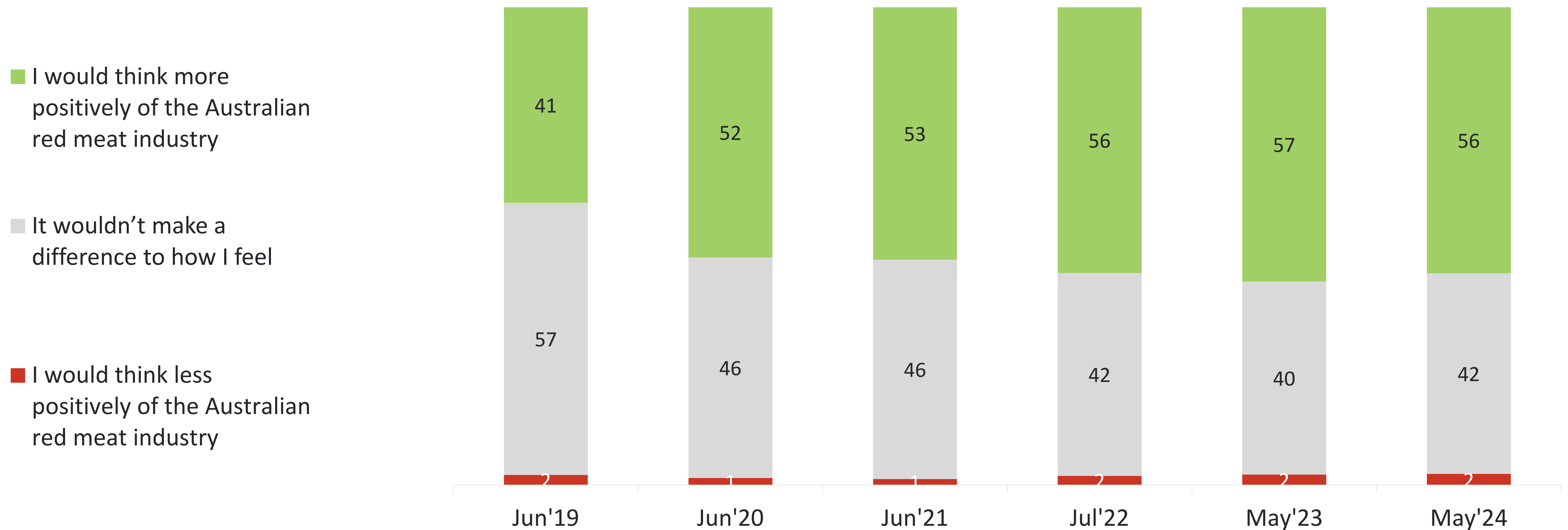
20%

Aware of ‘Australian Good Meat’

“Australian Good Meat - An initiative to showcase how Australian red meat is produced sustainably, in high welfare systems and is an important part of a healthy balanced diet”

Commitment to NET zero by 2030 has a positive impact on industry perceptions

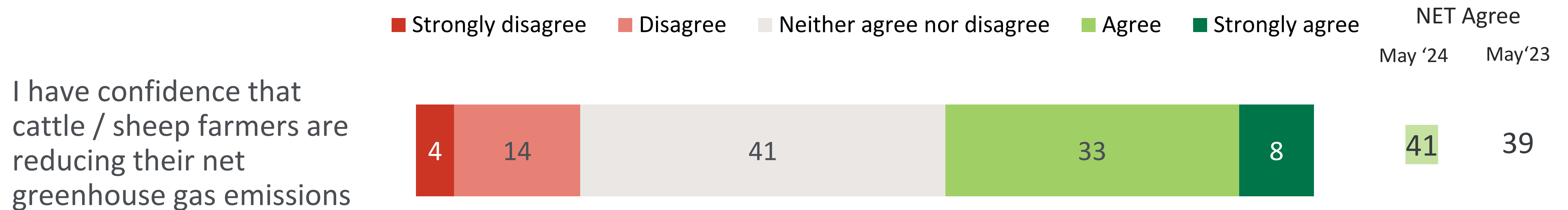
If AU red meat industry can reduce greenhouse gas emissions to zero by 2030(%)



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

But less than half are confident that farmers are reducing greenhouse gas emissions

Attitudes towards red meat industry (%)

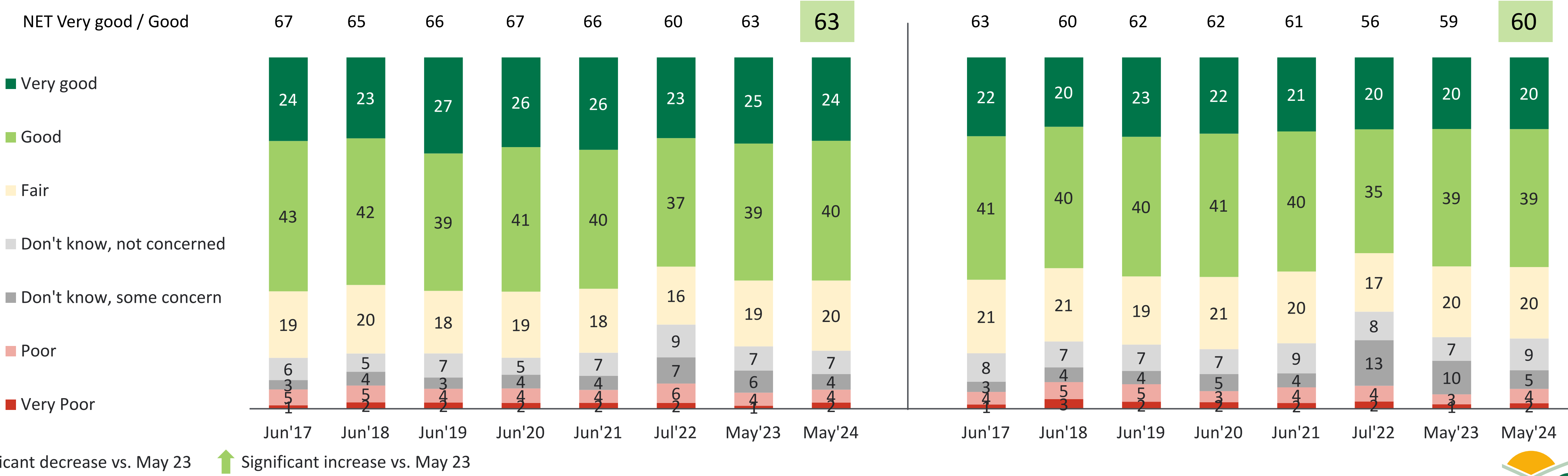




6. Morality matters most to social license

Overall industry perceptions are largely positive and stable

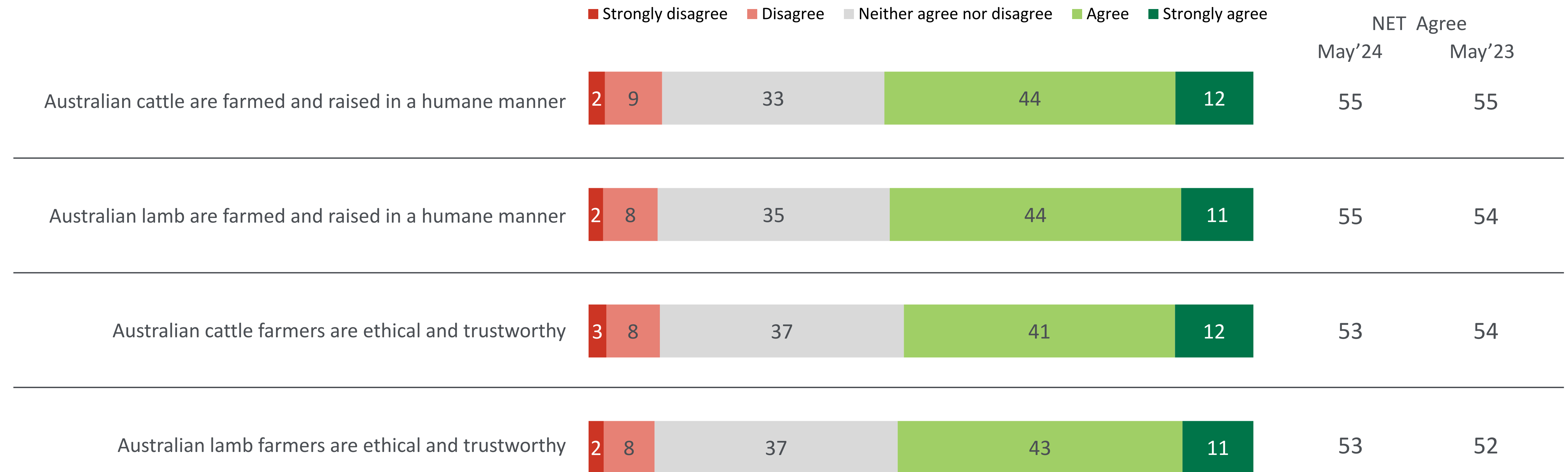
Consumer perceptions of Australian beef /lamb industries (%) – Among meat eaters



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

Just half agree that farmers are ethical and raise animals humanely – with only 1 in 10 in strong agreement

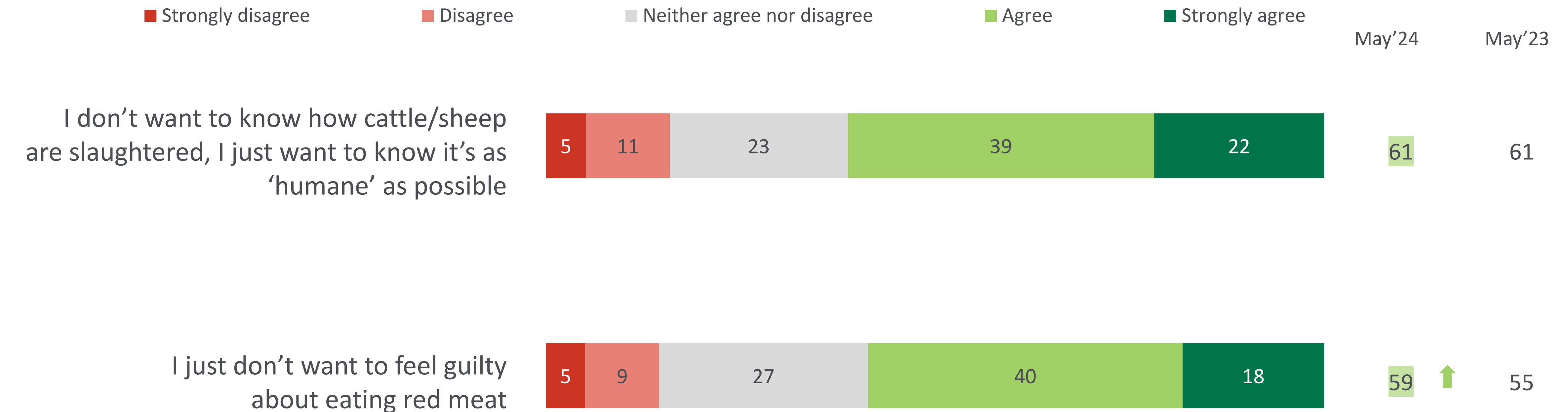
Attitudes towards cattle/lamb farmers (%)



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

People want assurance that cattle and sheep are slaughtered humanely – they don't want to feel guilty

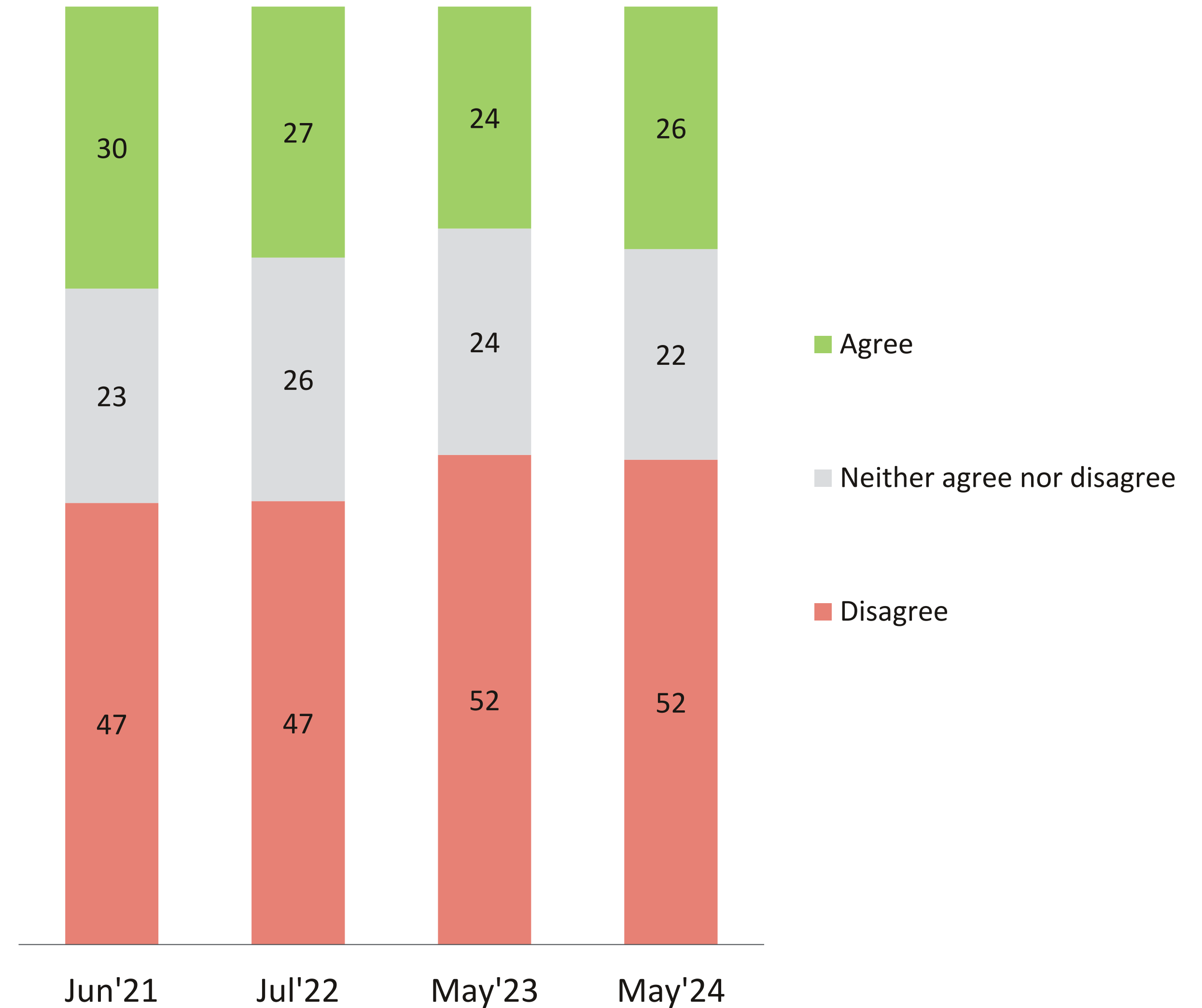
Attitudes towards cattle/lamb farmers (%)



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

Over the last three waves, approx. a quarter report feeling guilty about eating red meat

I feel guilty eating red meat (%)



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

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

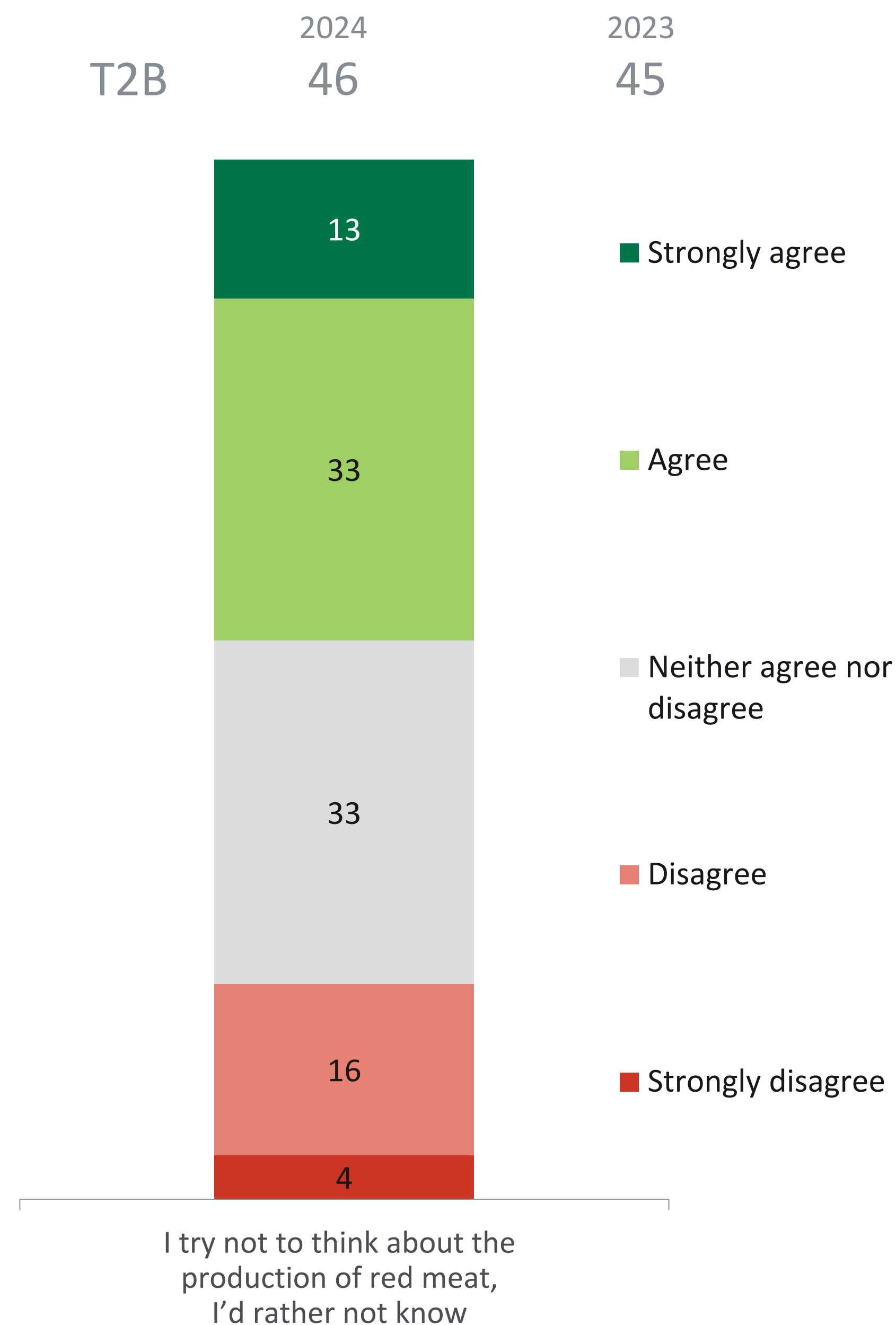


18% lamb
production

↓ 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



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

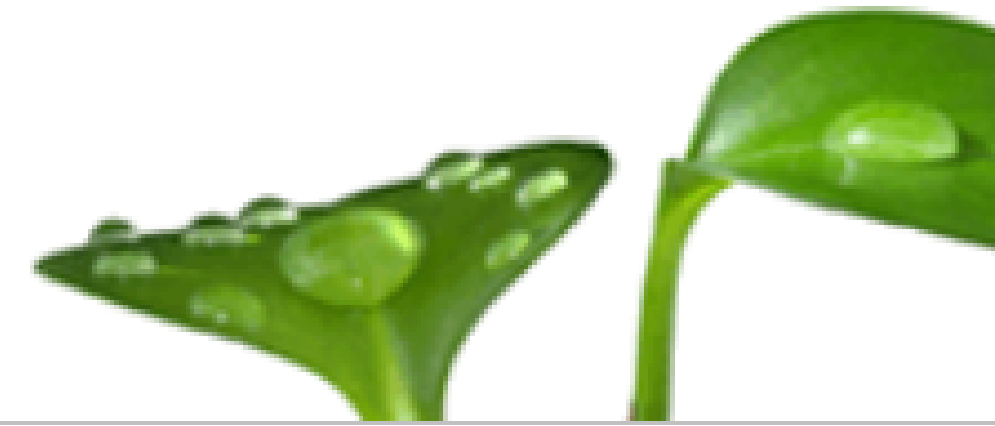


7. The dangers of hot herbal tea, guilt fatigue, MEBC

Even hot tea can cause cancer!

There is likely a scientific study for every single food group that shows a negative impact on your health.

What impact has this had on the consumer?



Drinking piping hot tea or coffee could 'double your risk of developing tumours in the oesophagus'

- People who drink hot tea at 60°C or higher saw their risk rise by 90 per cent
- The largest study of its kind followed 50,000 people over around a decade
- People in the UK and US typically drink beverages below 60°C
- Scalding water may damage the lining of the food pipe, causing tumours

By VANESSA CHALMERS HEALTH REPORTER FOR MAILONLINE

PUBLISHED: 15:01 AEDT, 20 March 2019 | UPDATED: 00:23 AEDT, 23 March 2019



**Australians
just want...**

to not feel guilty
about their food
consumption

38%

Just want to *not* feel guilty about being *unsustainable*

Guilt implies fault: nearly 2:5 of us feel that sustainability is our fault

Pollinate



Red meat is a sustainable aspect of the dietary guidelines

Open Access Feature Paper Article

Pathways toward Climate-Neutral Red Meat Production †

by Bradley Ridoutt ^{1,2} 

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² Department of Agricultural Economics, University of the Free State, Bloemfontein 9300, South Africa

† Presented at an OECD workshop Food and Feed for the Future, Lyon, France, 1 September 2023.

Methane **2024**, 3(3), 397-409; <https://doi.org/10.3390/methane3030022>

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Versions Notes

Abstract

Ruminant livestock industries can support the climate stabilization ambitions of the Paris Agreement through interventions that reduce GHG emissions (predominantly biogenic methane) and sequester carbon in landscapes. This study explored pathways for the Australian red meat industry (grazing, feedlot finishing, and domestic processing) to become climate neutral, whereby the radiative forcing (RF) footprint is plateaued and there is no additional forcing contribution. Emissions timeseries (CO₂, N₂O, CH₄) were compiled for 1990 to 2020 and projected to 2030 under a business-as-usual scenario (including an 18% increase in sheep and 13% increase in beef cattle) and with a range of production system and vegetation management interventions. The RF footprint peaked in 2018 at 7.13 mW/m² and decreased to 7.07 mW/m² in 2020. With the future expansion of the herd/flock and under business-as-usual conditions, the RF footprint is projected to increase by 2.8% by 2030. However, with a combination of interventions, production has the potential to increase with a decreasing RF footprint, a condition that can be described as climate neutral. The Australian red meat industry has made an historical contribution to global RF increase. However, with ongoing RF management, it is possible to increase food production within climate-neutral limits.



Role of Australian red meat in a healthy and sustainable diet

Report 1: Environmental impact of red meat in a healthy diet



Executive summary

ENVIRONMENTAL FOOTPRINT	IMPACT OF DIET	RED MEAT
<ul style="list-style-type: none">Relative to other foods in the Australian diet, the impact of Australian beef and lamb on water and cropland scarcity is low.Australian lamb is one of only two Australian foods that is climate neutral – since 1990, the contribution of Australian lamb production to global temperature increases has plateaued, making no further contribution.Climate neutral beef production can also be achieved through the adoption of production and waste reduction strategies outlined in the Australian red meat industry's Carbon Neutral by 2030 Roadmap.	<ul style="list-style-type: none">The amount of food consumed is the main dietary determinant of environmental impacts. The more food consumed, the higher the impact of the diet, regardless of whether it is a healthy or unhealthy diet.The relative impact of reducing red meat consumption below amounts recommended in the Australian Dietary Guidelines is relatively small and results in trade-offs such as higher water scarcity impacts.Provision of portion guidance of all foods, including red meat, in line with the Australian Dietary Guidelines is an effective way to help Australians follow a healthy diet and reduce the impact of overconsumption on health and the environment.	<ul style="list-style-type: none">Current average red meat consumption is 57g per day in Australia. This is stable and in line with the Australian Dietary Guidelines (55g per day).Consumption is typically across three to four meals per week, with little difference across socio-economic groups.Adopting meal-based recommendations to provide portion guidance helps consumers adjust intake of all foods consumed as part of the red meat meal occasion in line with the Australian Dietary Guidelines.

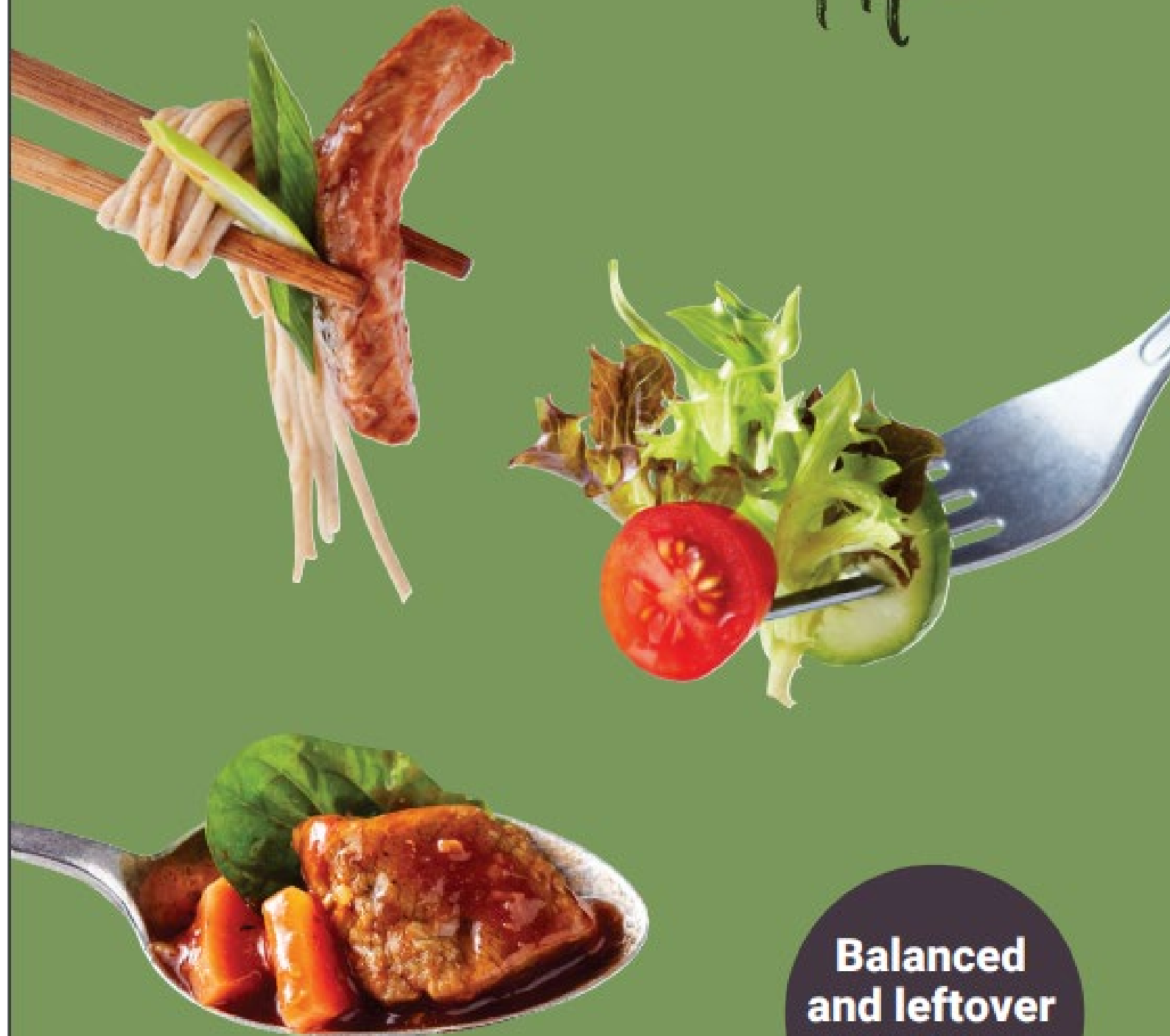
IN CONCLUSION

Supporting current red meat consumption in three to four healthy, balanced meals a week aligns dietary and environmental objectives.

3

'Make every bite count' ('Waste, waist, wallet & world')

make every bite count *tips*



Balanced
and leftover
meal ideas

Nutritious choices

Recommended choices

Australian Dietary Guidelines recommend:

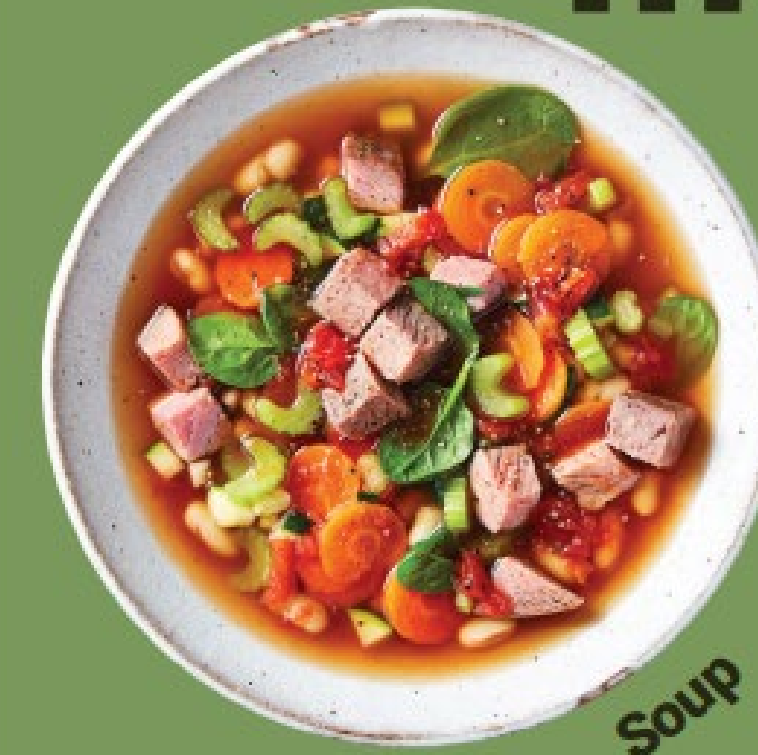
- Beef, lamb, pork, kangaroo and game meat.
- Fresh lean meat cuts and lean, sodium reduced sausages.
- Lean cuts include mince, steak, diced, strips, slow cooked cuts, roast and chops.
- For lean meat, use a sharp knife to remove any separable fat.

Australian beef and lamb

Lean mince and all cuts are packed with 12 essential nutrients important for health and wellbeing.

- Excellent sources of iron, zinc, vitamin B12 and high quality protein.
- Predominantly grass-fed providing a source of omega-3.
- A source of vitamins B2, B3, B5, B6, selenium, magnesium and phosphorus.

Leftover meals



Soup



Sandwich



Salad

Make Every Bite Count

Very positively received in consumer research

And developed in close consultation with dietitians.

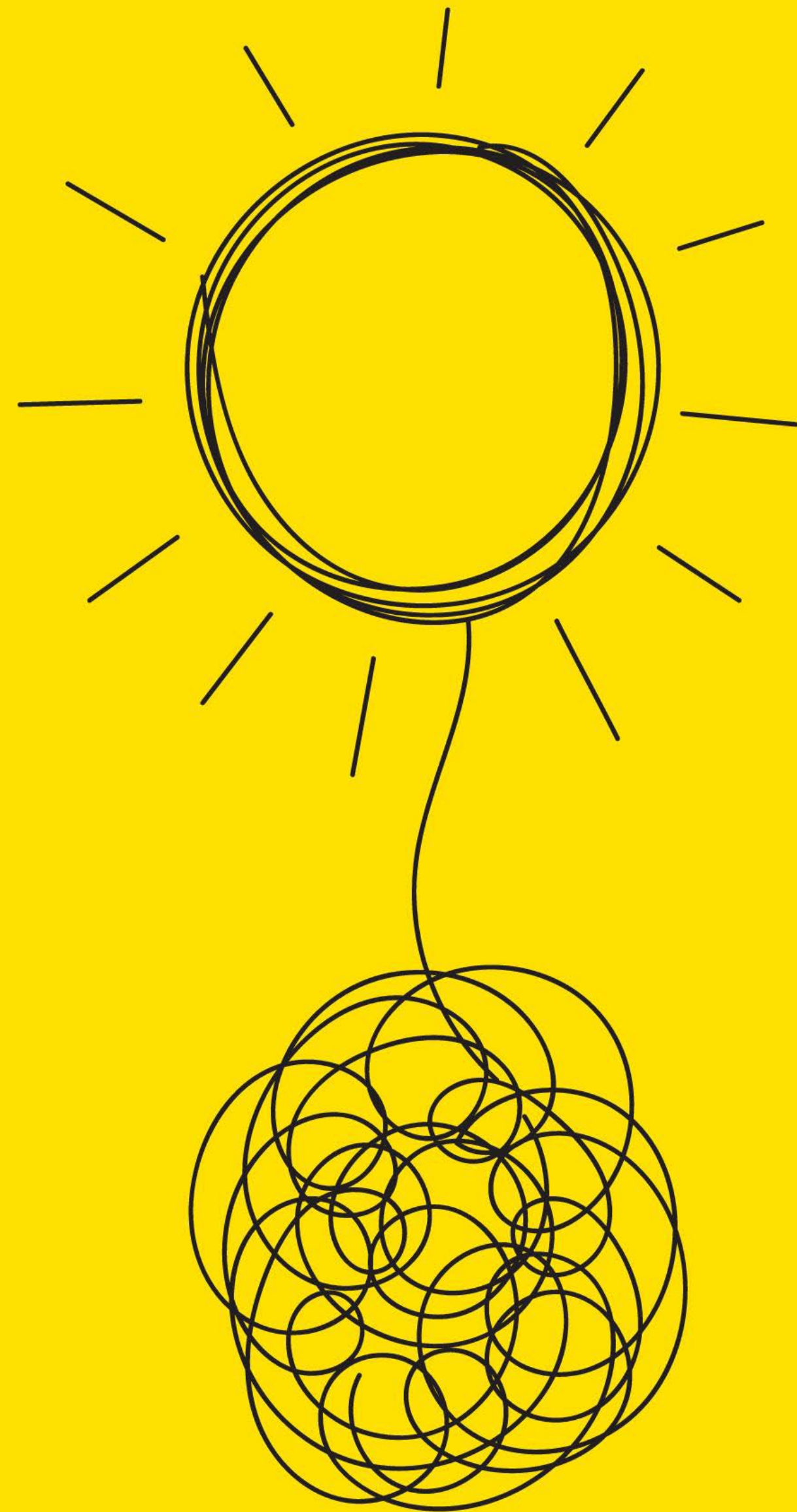
Community interest in
**make every
bite count** *Tips*

73% “This sounds like a great initiative”

68% “I’m keen to find out more about this”

66% “I can see myself applying this to the way I eat”





Key insights

1. The number of red meat reducers continues to decline as the number of households increasing red meat consumption continues to rise in the face of cost-of-living pressures
2. Increasers are younger, culturally diverse and driven by health and nutrition appeal, especially protein and iron and a corresponding rise in 'I just like meat'
3. Trust in red meat farmers remains high but trust to care for the environment is not as strong: sustainability is red meat's relative weakness, especially to younger or female audiences
4. Disagreement with the industry being committed to sustainability has doubled to 14% in ten years (whilst agreement has been stable)
5. 'Moral' issues matter the most in terms of social license
6. And the consumer just wants to NOT feel guilty about enjoying beef!
7. Which the science says is possible and is also a vital part of a healthy diet, made easy for people with 'Make every bite count'



Thank you

