

Community Accountability

Community and consumer tracking regarding attitudes and expectations of the red meat sector

Background and Objectives

Since 2010, Pollinate has explored the metropolitan community's concerns and understanding of the meat industry

This research:

- Measures people's perceptions of the red meat industry
- Tracks changes in community perceptions over time
- Helps to understand the purchase behaviours, triggers and barriers to the consumption of meat
- And provides insights to help MLA's ongoing communication strategy

Design and methodology

What 20 minute online survey

Who Main Grocery Buyers and Meal Preparers
SYD, MEL, BRI, ADE, PER, who do not reject eating beef and/or lamb

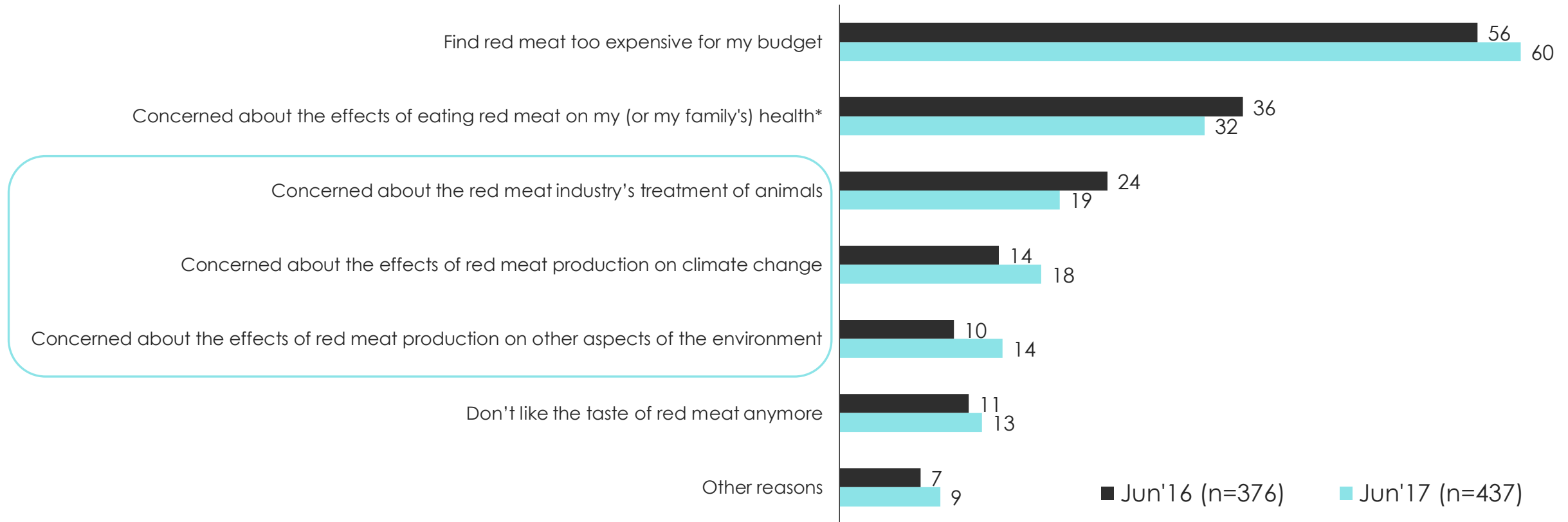
How many Minimum n=1000 respondents every year
Total respondents since 2009: n=8,785

When June every year

A robust sample over a 7 year period

The reason for eating less red meat continues to be cost, first and foremost, followed by health

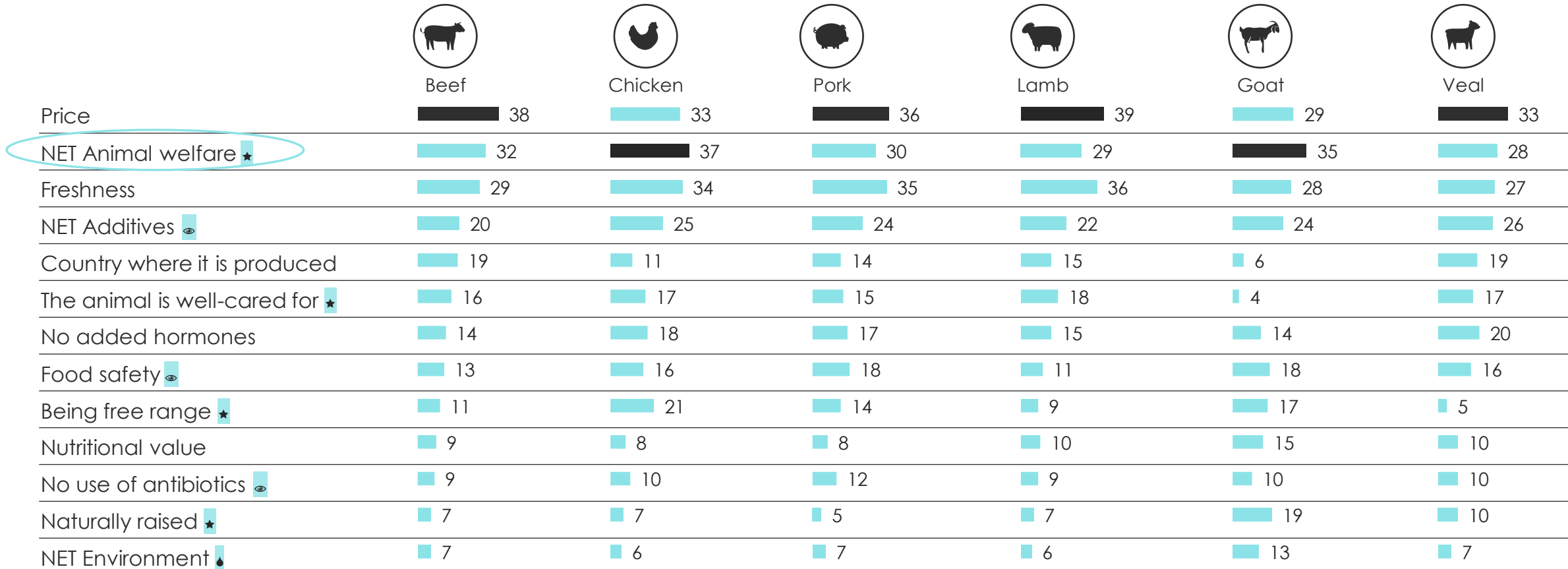
*Reasons for eating less red meat (%), among red meat reducers
(Respondents could pick as many reasons as appropriate)*



* "Or my family's" added to reason in Jun '17

Price remains an important consideration when purchasing, while environmental impact is low

Purchase considerations (T2B%, Most + 2nd most important)



★ Animal welfare 🌿 Environment 👁️ Additives

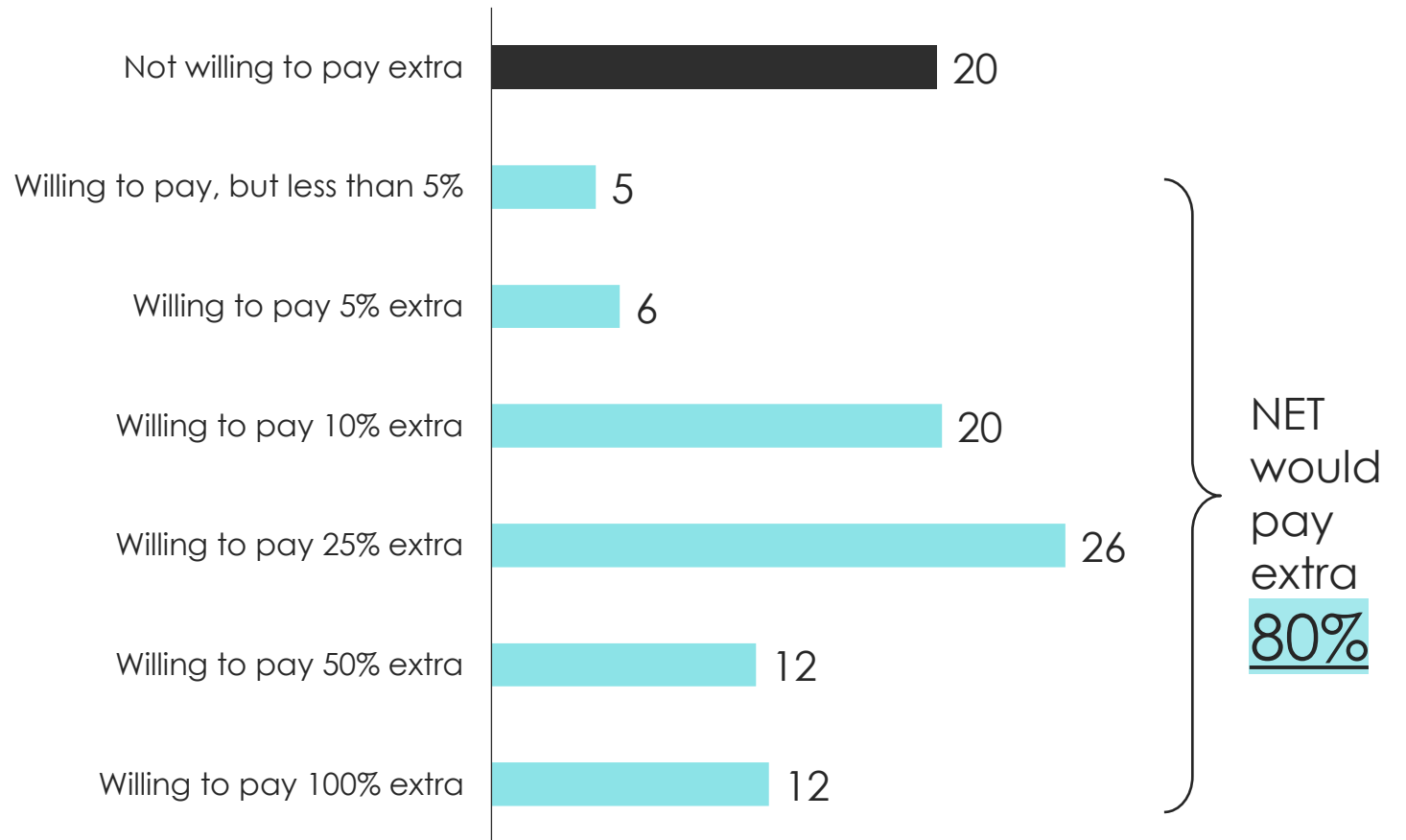
Note: the smallest purchase considerations (which were mostly environmental ones) are not shown for brevity – for full results, see appendix

As an aside ...

People claim they would pay extra for meat certified as better for animal welfare

80% of meat eaters claim to be willing to pay more for certified humanely treated meat

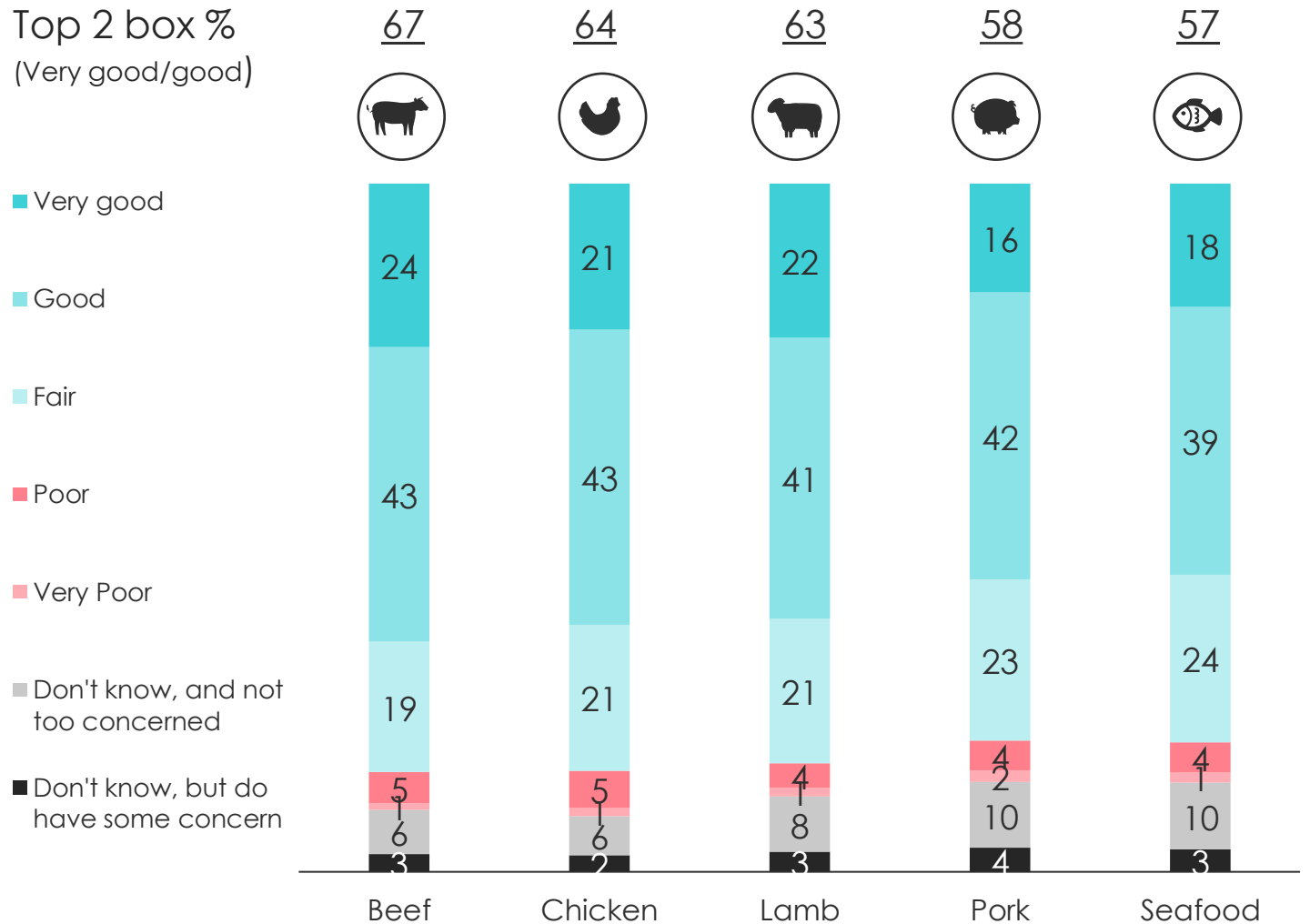
Willingness to pay for meat certified as coming from an animal that has been treated humanely? (%), among red meat eaters



The Australian Beef industry is viewed most positively, with Pork and Seafood the least

Note: there is relatively little negativity across the board: Australian protein industries are viewed quite positively (among meat eaters)

Thinking about the production of the following foods in Australia, how do you feel about each industry? (among red meat eaters)





More than half the sample struggle to mention anything negative about the beef industry

Spontaneous positive associations



Note: **57%** don't know/none

Spontaneous negative associations



Note: **59%** don't know/none

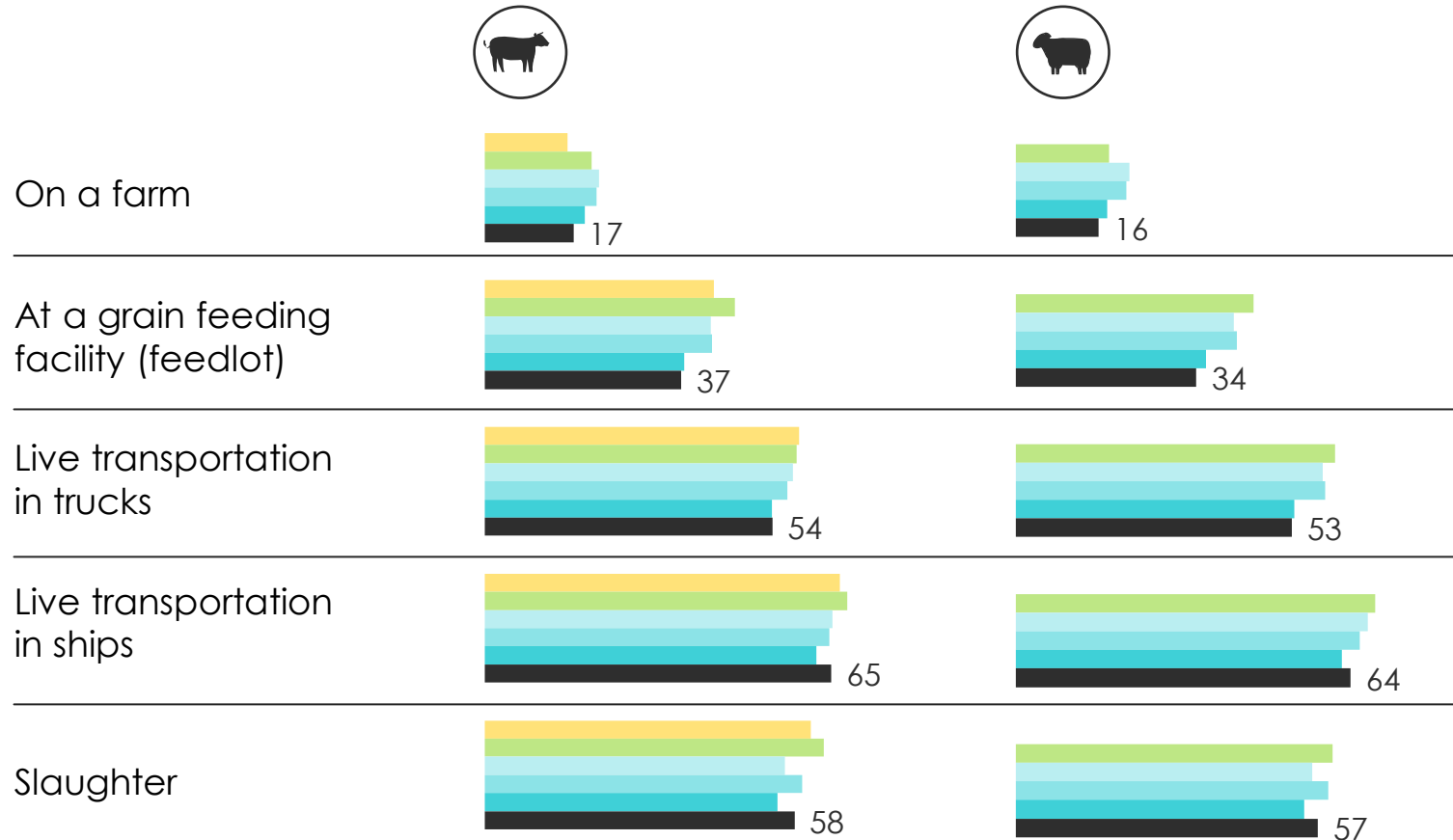
*Word cloud – the larger the word, the more frequently it appeared in the open-ended responses NOTE: excluding “None”/“Don't know” responses

A4a. What positive things do you know (or have heard or read) about the beef industry? A4b. What negative things do you know (or have heard or read) about the beef industry? Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb) n=1400

The concern
is highest
at live
transportation
and slaughter
stages of the
production
process

Concerns related to specific production stages

(Total concern, T2B%) Among red meat eaters



Note: Lamb not asked in 2012

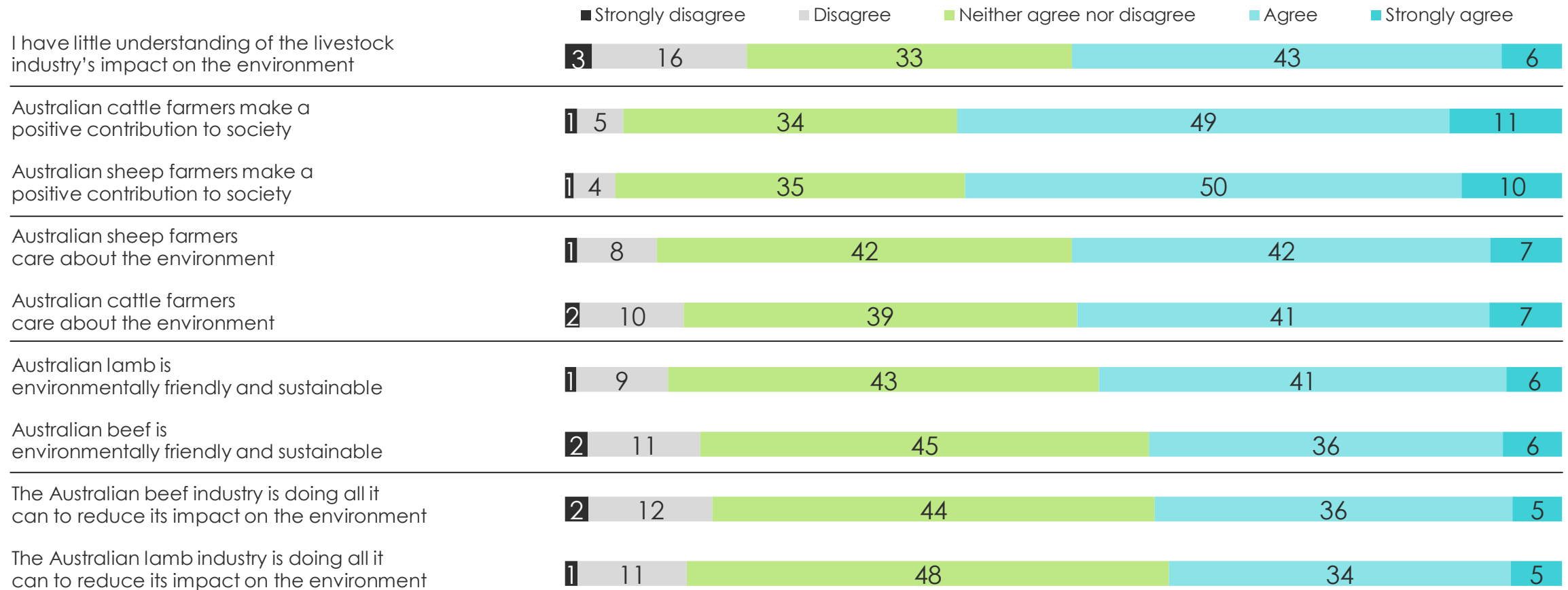
■ W3 Jun12 (n=1002)
■ W4 Jun13 (n=602)
■ W5 Jun14 (n=1001)
■ W6 Jun15 (n=1007)
■ W7 Jun16 (n=1389)
■ W8 Jun17 (n=1400)

C5/C5b. Please indicate how concerned you are about the following stages of [beef/lamb] production Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb)

There is low negativity toward sheep and cattle farmers

However less than half agree the industry is doing all it can to reduce its impact on the environment

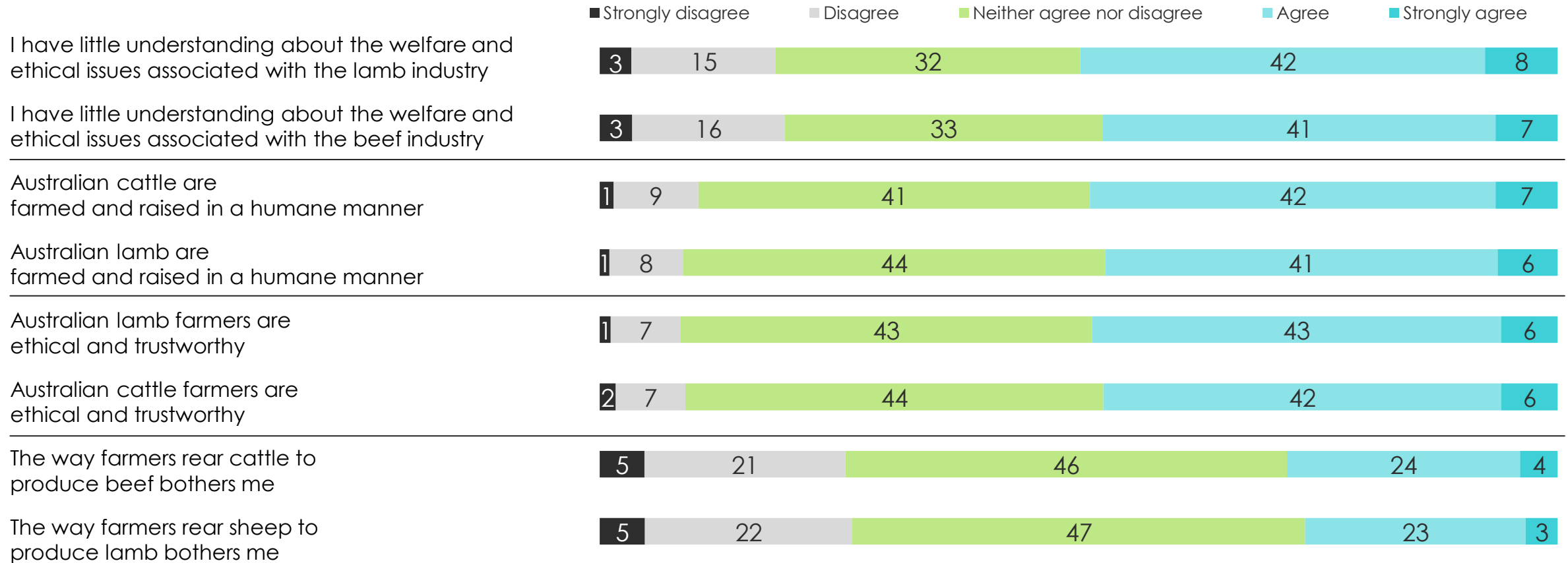
Specific environmental issues (%), among meat eaters



Again in general Australians believe farmers are treating animals humanely

However many sit on the fence and would require convincing to shift their point of view

Specific humane issues (%), among meat eaters



Three key points for today

1

The number of people eating less red meat is primarily driven by issues related to price, health, and the treatment of animals

2

Similarly, price remains the most important factor when buying meat, followed by animal welfare

3

There is little negativity towards the red meat industry as a whole – however there is concern regarding welfare issues: transport and slaughter

Thank you

Pollinate

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