Research design and methodology

What	20 minute online survey, exploring people's understanding and perceptions of the red meat industry
Who	A sample of Main Grocery Buyers and Main Meal Preparers aged 18-64 from the 5 major capitals (SYD, MEL, BRI, ADE, PER) who do not reject eating beef and/or lamb**

	Wave 1	Wave 2	Wave 3	Wave 4	Wave 5	Wave 6	Wave 7	Wave 8	Wave 9
Sample size	n=761	n=1000	n=1002	n=602*	n=1001	n=1007	n=1500 **	n=1501**	n=1538**
Fieldwork	Feb 10-16, 2010	Dec 1-13, 2010	Jun 13-26, 2012	Jun 13-26, 2013	Jun 19-27, 2014	May 21-Jun 2, 2015	Jun 8-15, 2016	Jun 23-28, 2017	Jun 19-25, 2018

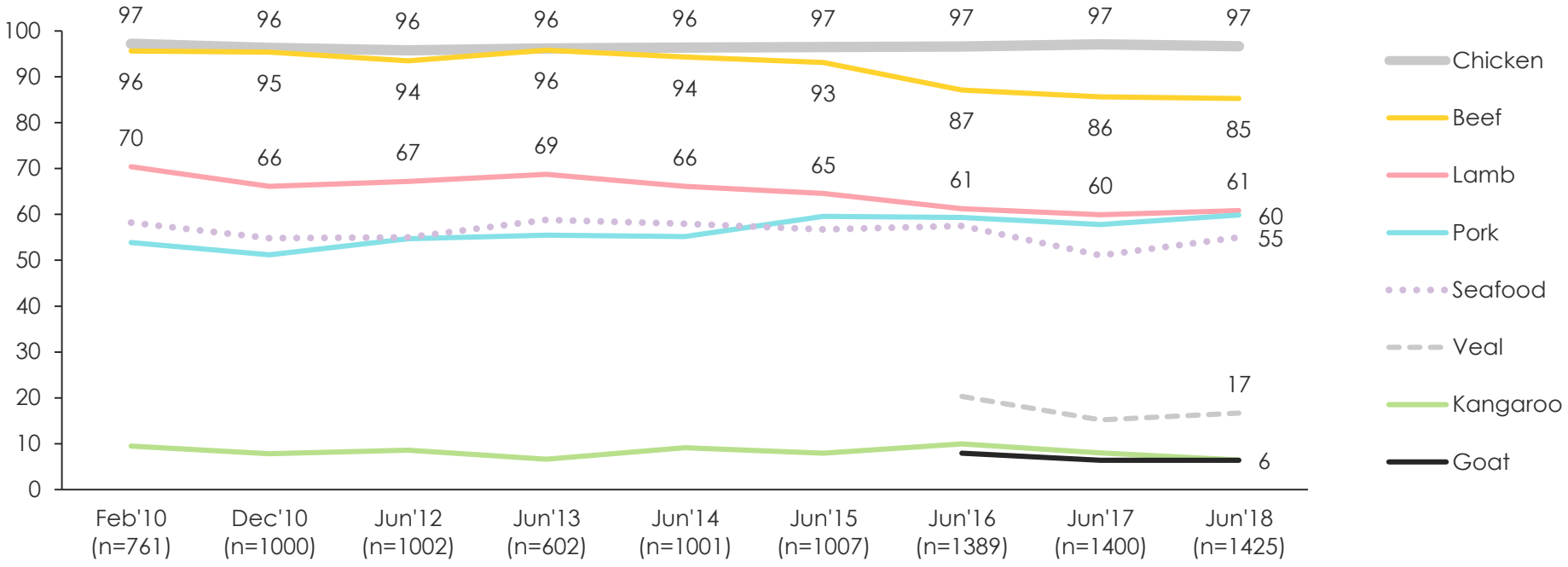
*Wave 4 included an additional sample representative of metro Australians (n=411) to see how representative MGB/MMP is on the wider metro Australian population. There was very little difference in red meat attitudes and behaviours between the two samples.
**Wave 7 onwards included a larger sample of metro MGB/MMP, but did not screen out rejectors of beef/lamb, to get a subsample of vegetarians

A robust sample from which to draw conclusions and compare to previous waves

1 The claimed level of red meat consumption is stable

After a period of decline, repertoire consumption of beef and lamb has stabilised over the last 2 years

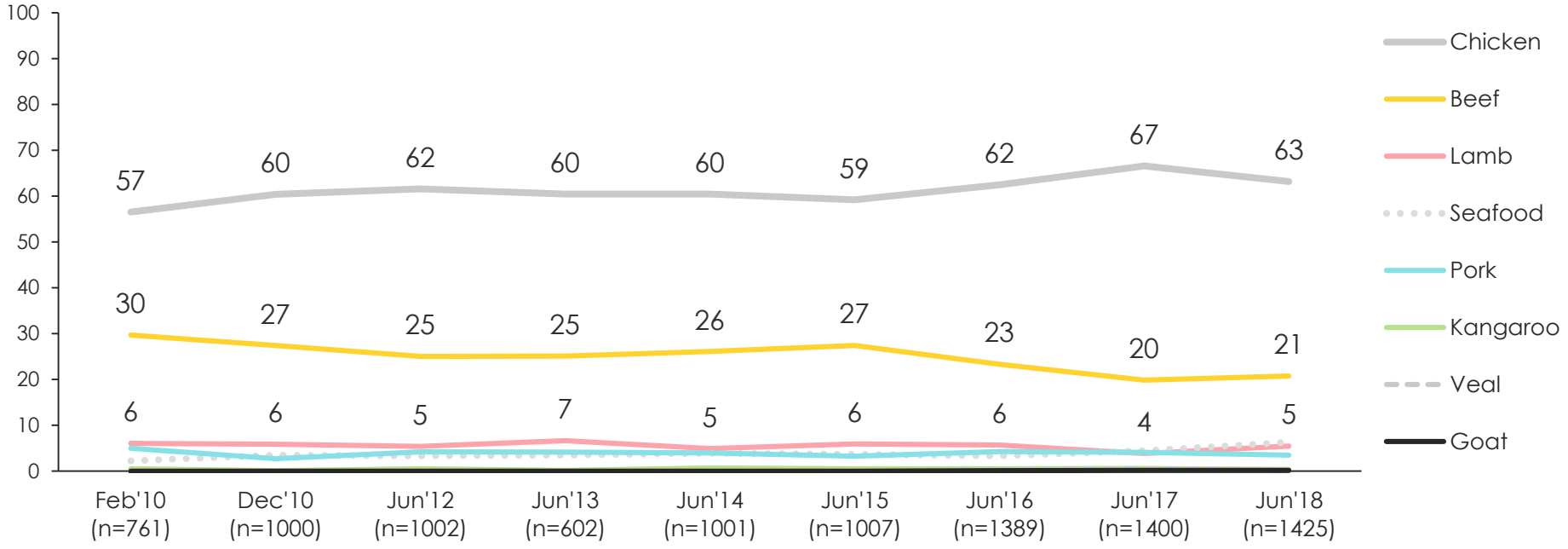
Buy and eat regularly (%), among red meat eaters



A1. Which of the following do you buy and eat regularly at home?
Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb)

The previous shift away from beef in favour of chicken has eased

Buy and eat most often (%), among red meat eaters

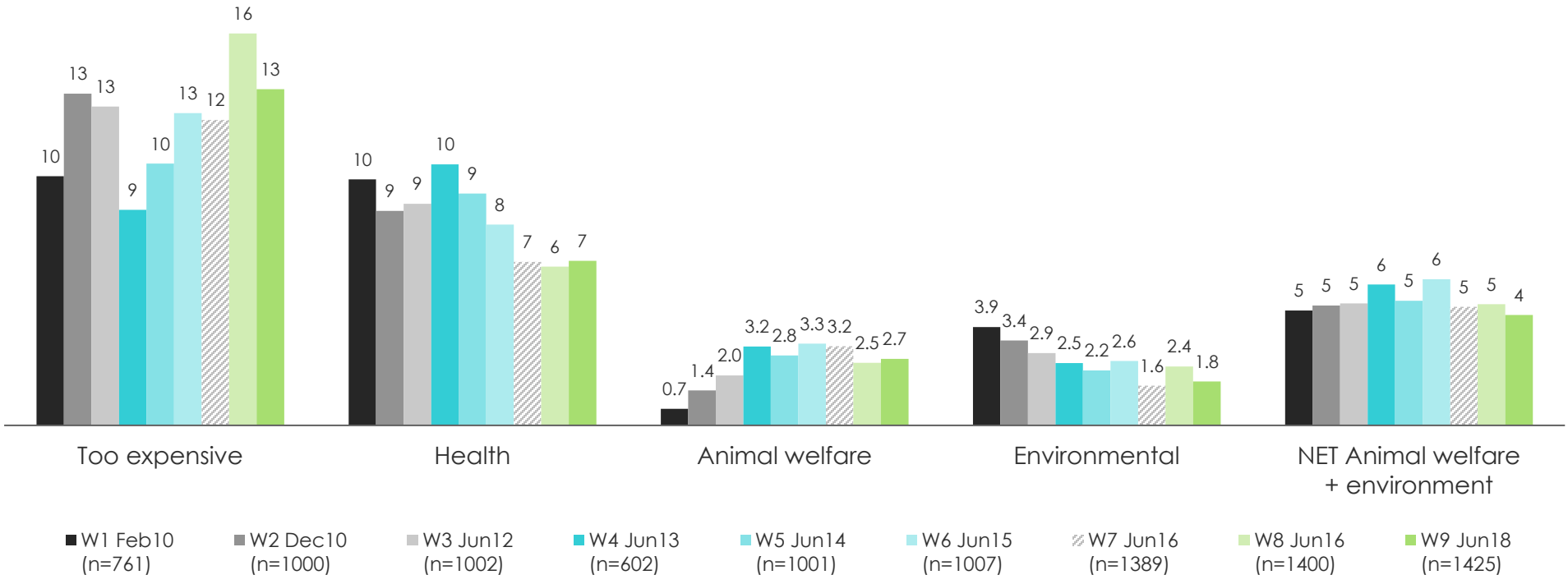


Long term: chicken used to be twice as popular than beef, but now it's 3x more popular

A2. Which of the following meats do you buy and serve most often?
Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb)

Only 1.8% of MGB meal preparers are eating less red meat primarily due to environmental concerns

Main reason for eating less red meat (%) (re-based to total meat eating sample)
FORCED ONE RESPONSE ONLY



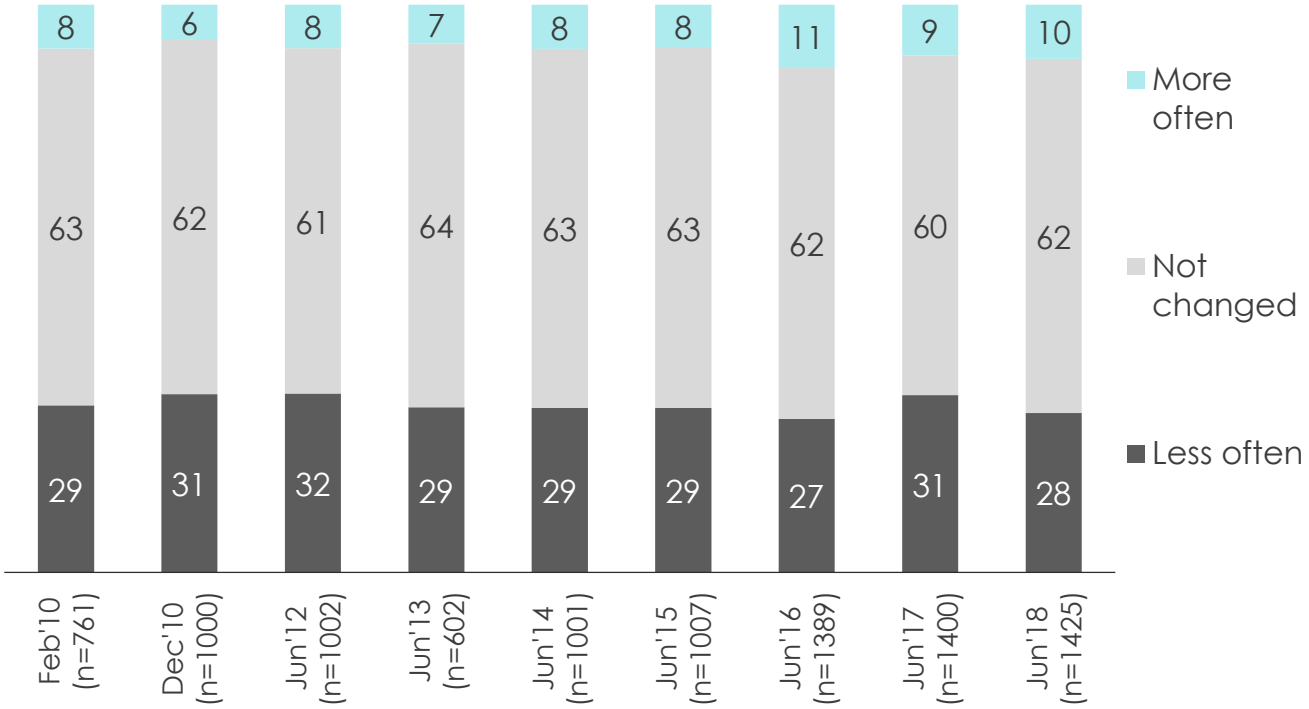
A9. And which ONE of the following best describes why you have reduced the amount of red meat you are eating?
Base: Total meat eating sample

2

The number of red meat reducers is stable (at less than 1/3rd of meat eaters), and the number of them driven by environmental concerns remains low (1.8%)

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

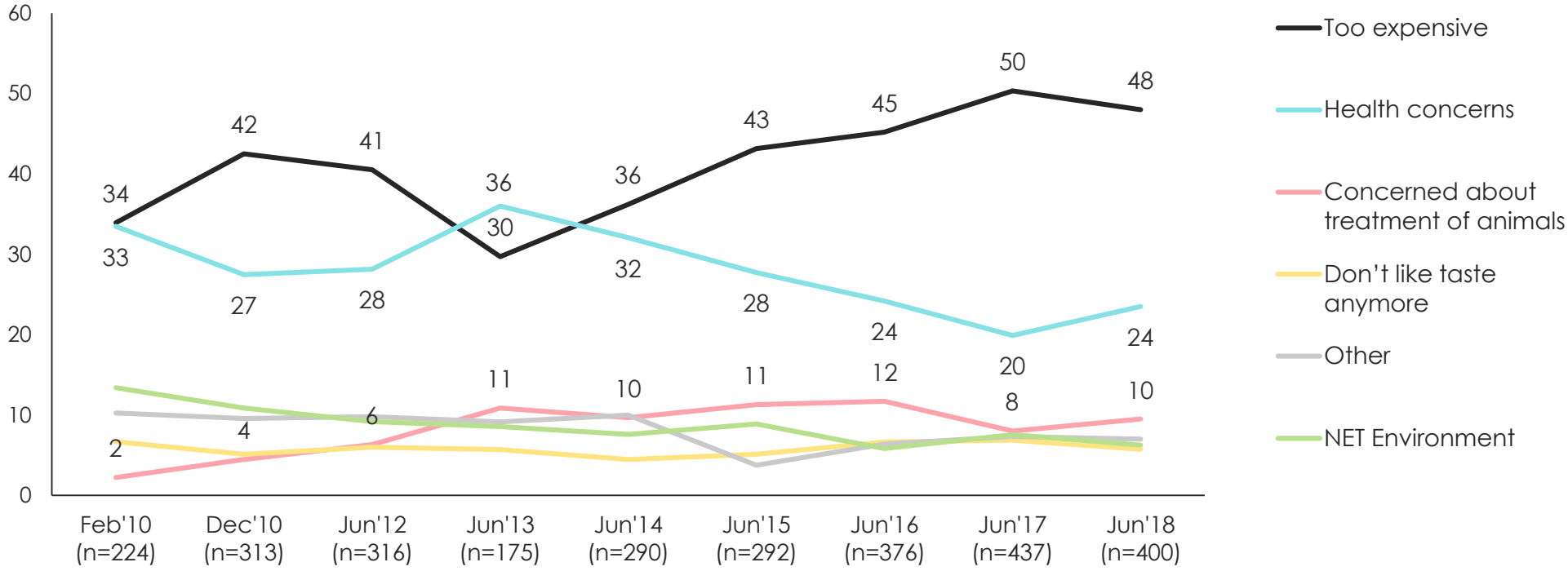
Relative red meat consumption, compared to 1 year ago (%), among red meat eaters



A7. Which one of the following statements best describes how often you eat red meat now, compared to 12 months ago? I eat red meat...
Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb)

The primary reason for eating less red meat is cost and not health

Main reason for eating less red meat (%) (among red meat reducers)
Forced one response only



Long term: treatment of animals remains at around 10% vs. 2-4% when we started tracking

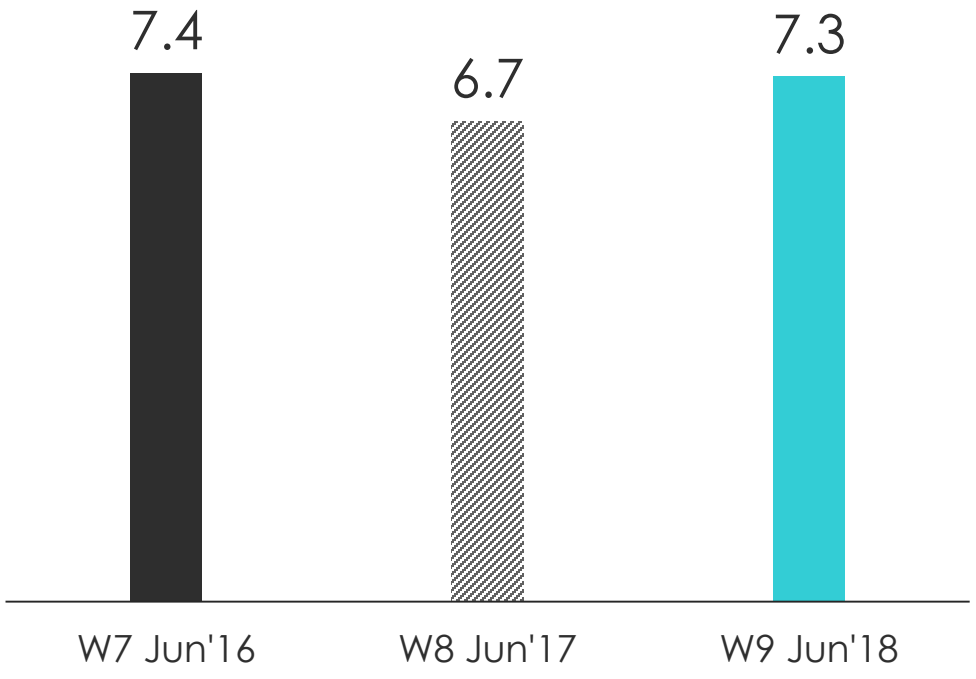
A9. And which ONE of the following best describes why you have reduced the amount of red meat you are eating?
Base: Those eating less red meat

3

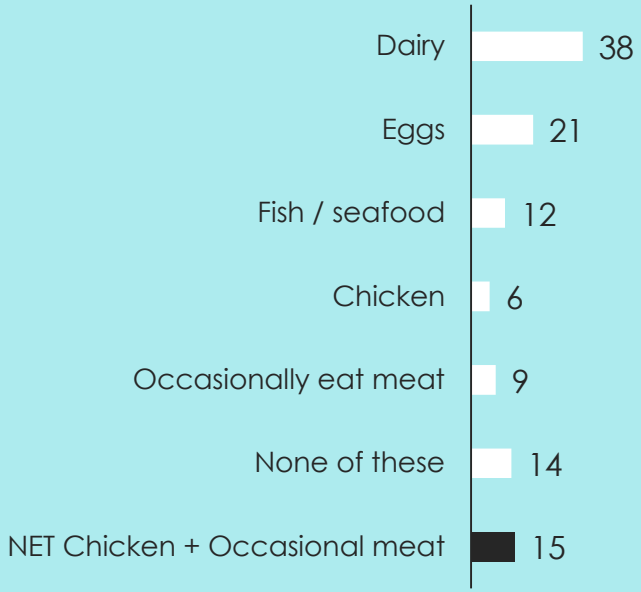
The proportion of metro Australians who are vegetarian remains at 7%, with the primary motivator being animal welfare concerns

7% of the Australian metropolitan population claims to be vegetarian

Incidence of claimed vegetarianism in metro Australia (%)



Do you eat... (%) (among vegetarians)

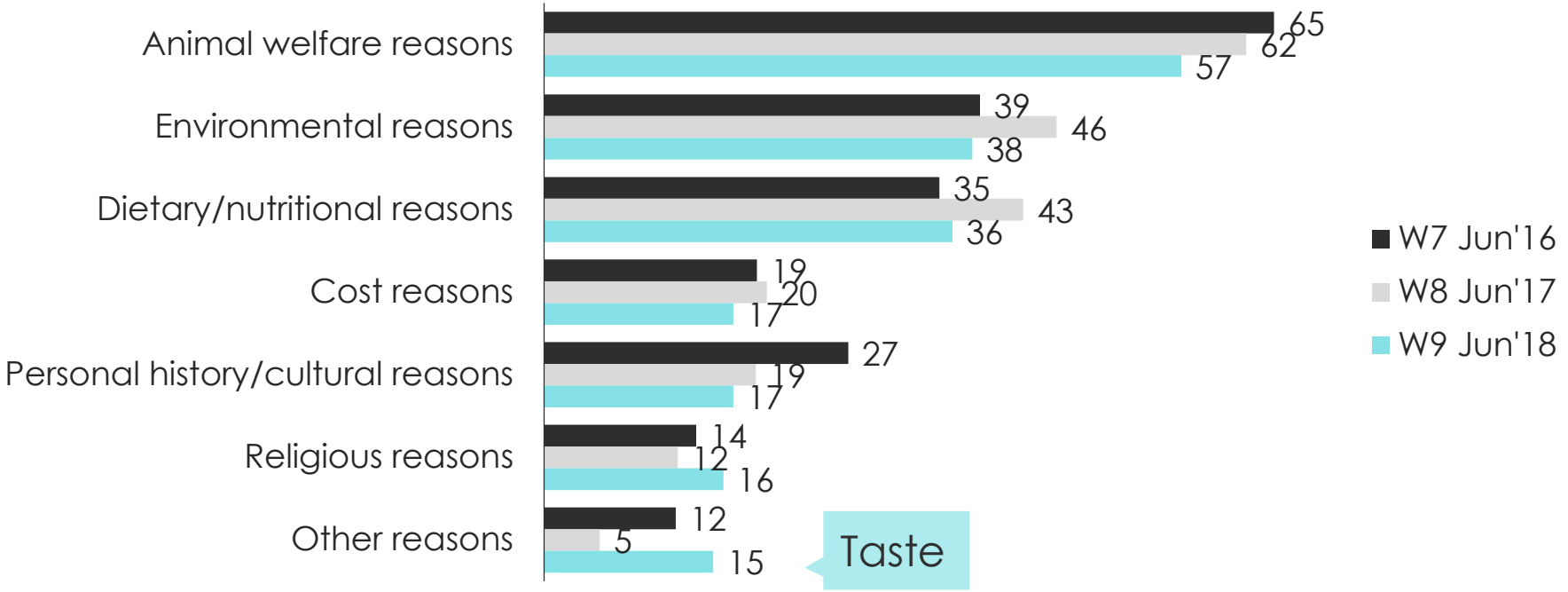


… however some people's definition of vegetarianism is loose, with 15% eating meat

S7. Are you a vegetarian? Base: Metro MGB/MMP, n=1500 / 1501 / 1538
S7B. Do you eat any of the following? Base: Those who claim to be vegetarian, n=94

Animal welfare is still the main (claimed) reason for being a vegetarian

Reasons for not eating meat (%), among vegetarians



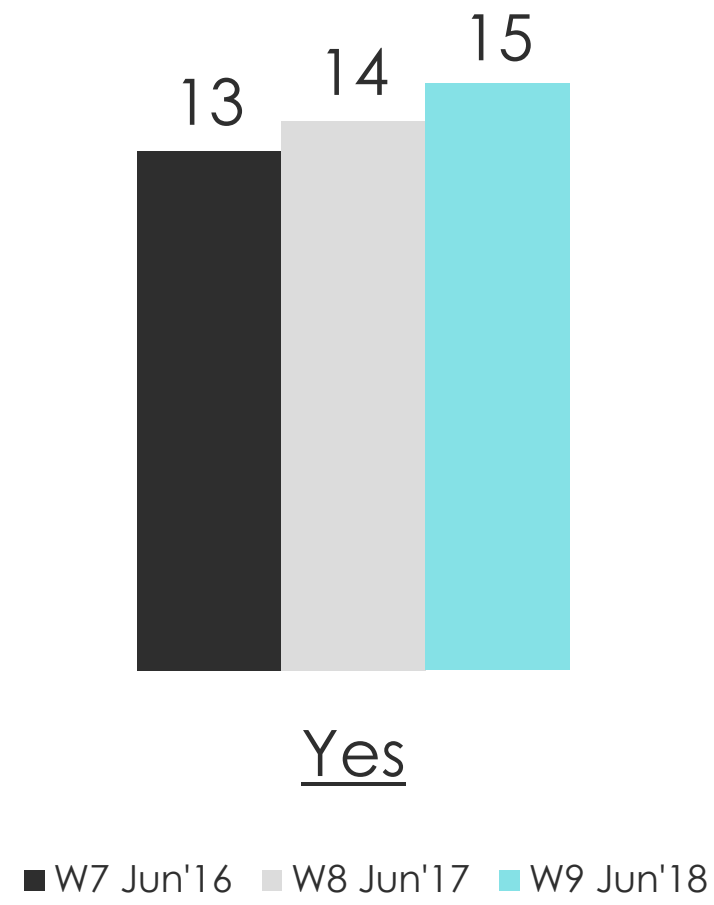
… although this is showing signs of decline

V2. What are the main reasons you don't eat meat?
Base: Vegetarians and red meat rejectors, n=111 / 101 /113

15% of meat eaters have been vegetarian in the past …

(Driven primarily by health concerns)

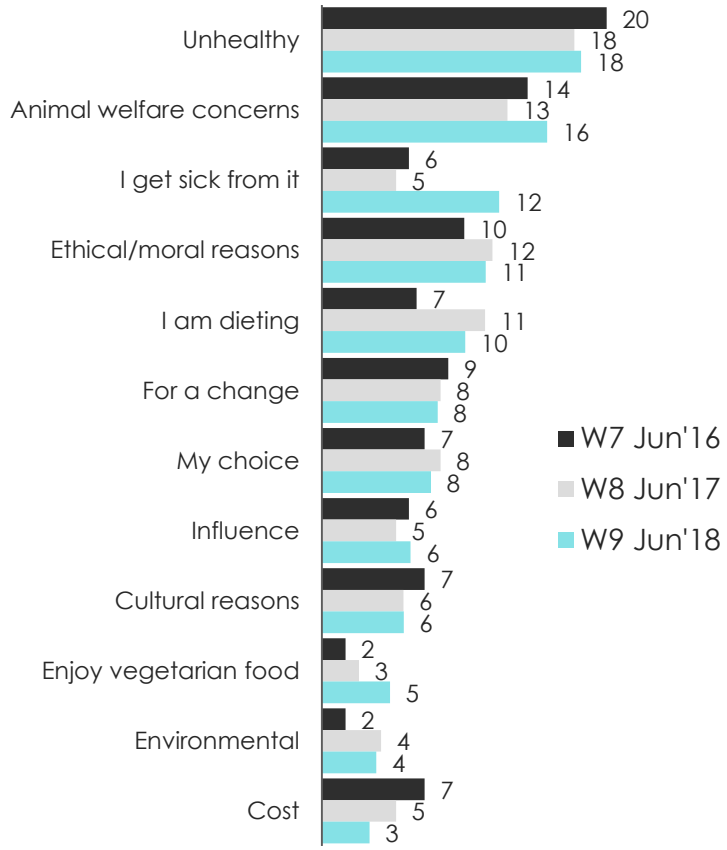
Ever been a vegetarian?
Among current red meat eaters



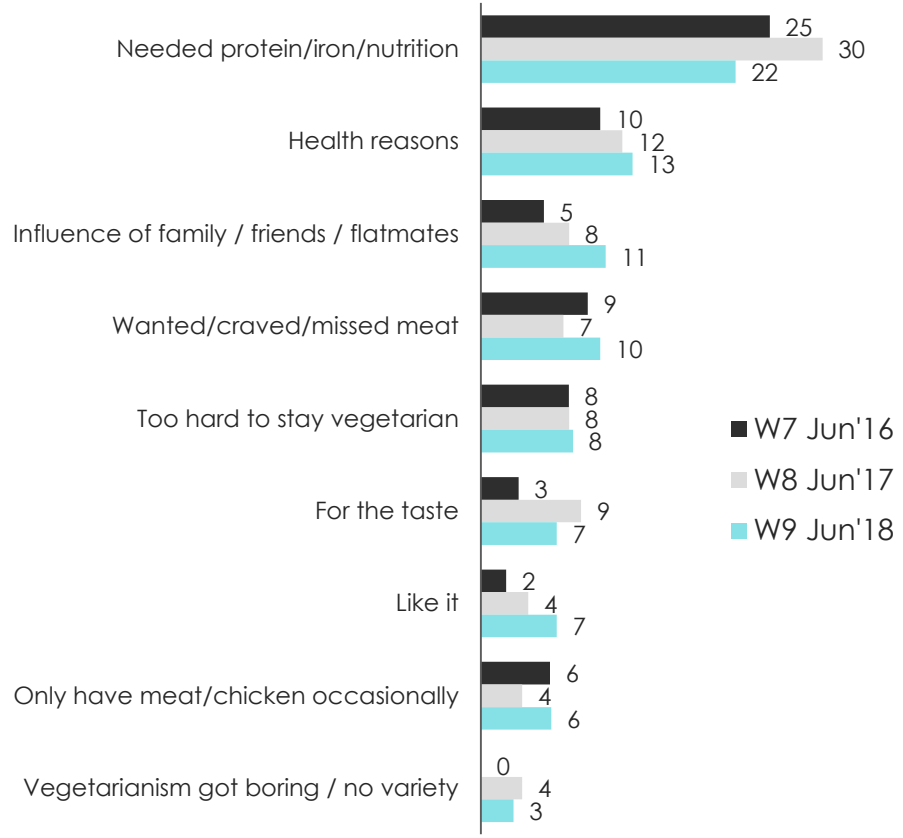
V6. Have you ever been a vegetarian (i.e. stopped eating meat for a while)?
Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb) n=1389 / 1400 / 1425

… but have returned to meat for nutrition & health needs

Reasons for stopping eating meat (%)



Reasons for eating meat again (%)



Long-term vegetarians are motivated by animal welfare, while short-term ones are driven by unhealthy perceptions (which are overcome)

V7. Why did you stop eating meat? V8. Why did you start eating meat again? CODED OPEN-ENDED RESPONSES
Base: MGB/MMP who are non-rejectors of red meat but have been vegetarian in the past, W7 n=182 / W8 n=194 / W9 n=211

4

Price remains the most important factor when buying meat, with environmental impact low on the hierarchy

Price, animal welfare and freshness remain the top considerations when purchasing

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

	Beef	Chicken	Pork	Lamb	Goat	Veal
Price	37	33	36	37	12	25
NET Animal welfare ★	33	39	33	30	41	28
Freshness	29	33	32	34	14	33
The animal is well-cared for ★	18	15	20	15	13	12
Country where it is produced	18	12	13	15	8	15
NET Additives 👁	17	24	25	20	32	30
Food safety 👁	13	15	16	16	12	16
No added hormones	12	18	16	14	24	23
Nutritional value	10	9	7	9	13	9
Naturally raised ★	10	9	7	10	17	9
Raised on pasture	10	4	5	7	10	9
NET Environment 💧	10	6	7	6	16	5
No use of antibiotics 👁	8	10	12	8	11	11

★ Animal welfare 💧 Environment 👁 Additives

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

Animal welfare is made up of concerns around being 'well-cared for', 'naturally raised' and 'free range'

A6b. Please indicate the top 3 factors that are most important when selecting and buying [INSERT MEAT]. (Top 2 box % - ranked first or second most important factor)
Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb) n=484, 977, 485, 487, 90, 209

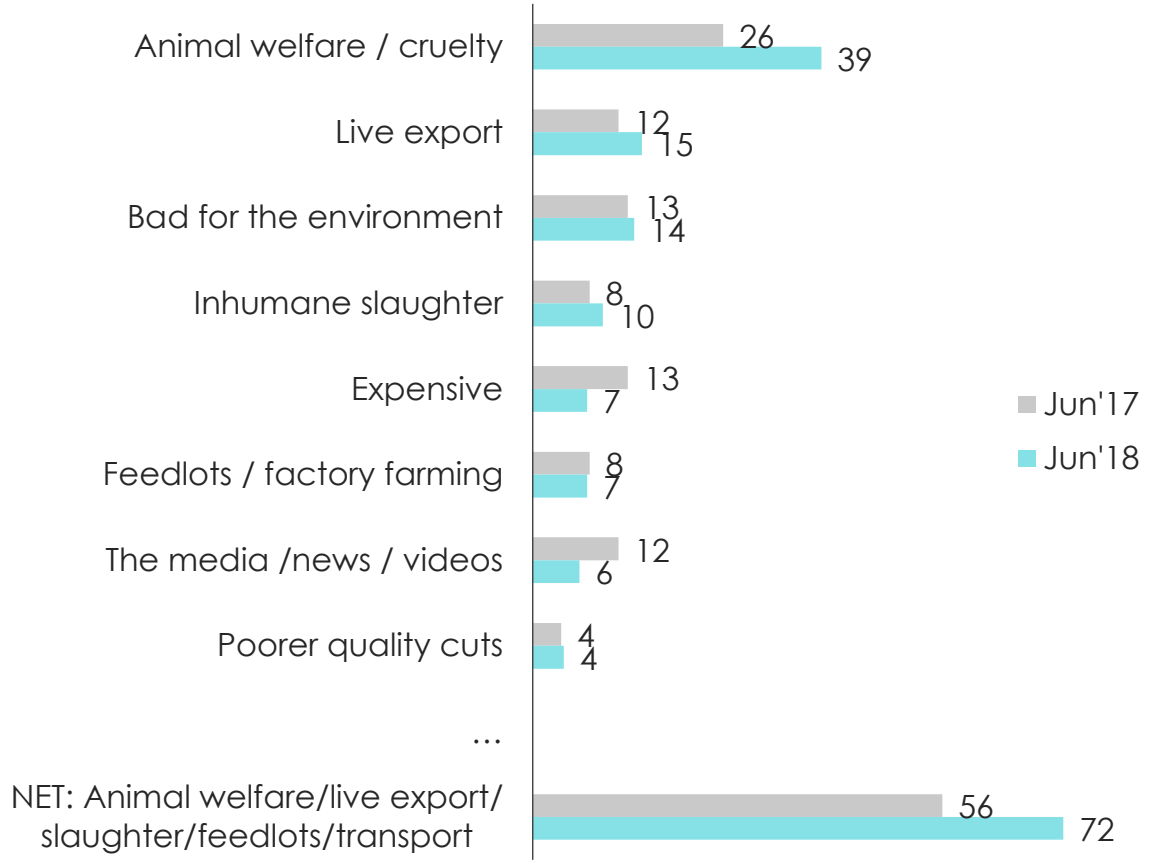
5

There is relatively little negativity towards the beef industry (6% poor/very poor), and negative perceptions are driven by animal welfare concerns

Those with a poor perception of the beef industry (7%) are mainly driven by animal cruelty issues

… which has increased over the past year

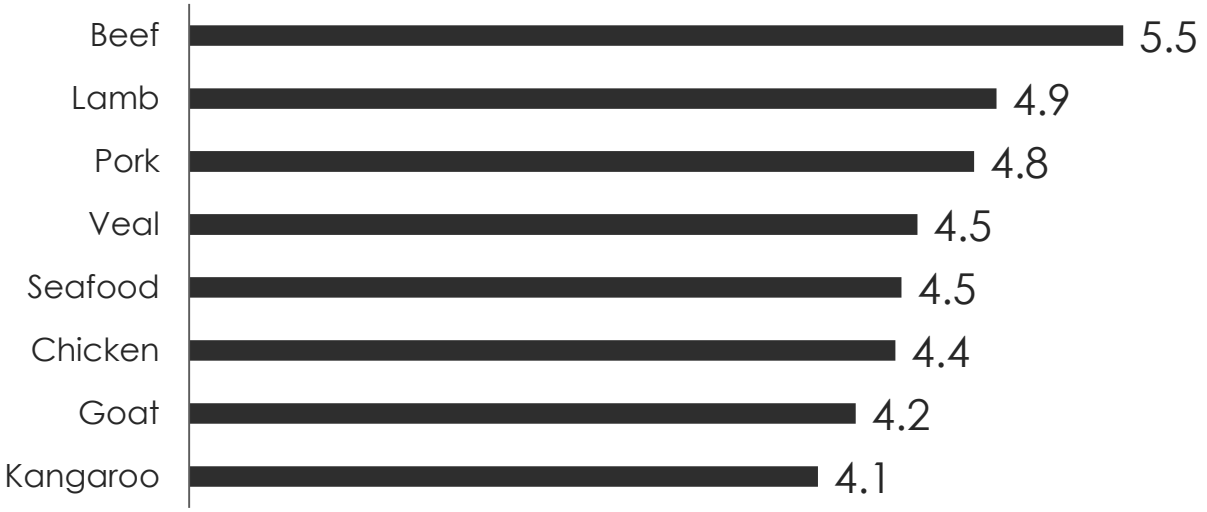
Reasons for rating the beef industry as poor/very poor (among those with a poor perception of the beef industry)



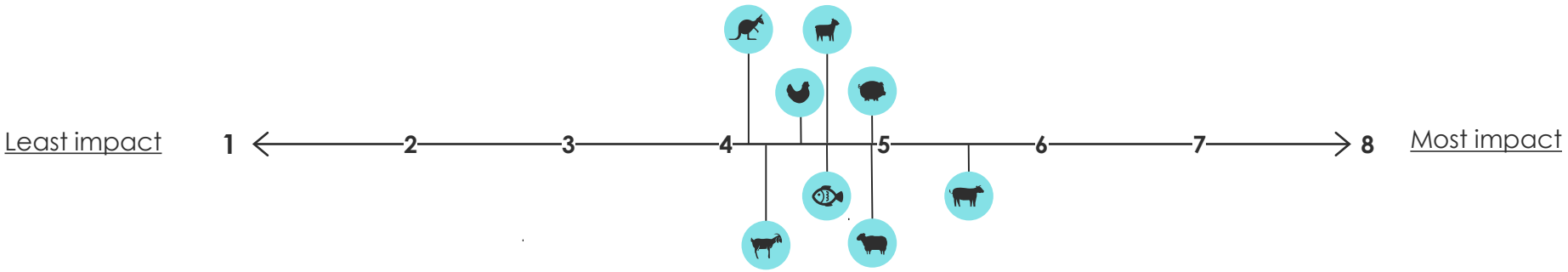
X2A And why do you say that about the beef industry? Base, those who rated the beef industry as poor or very poor, n=77 / 94

Beef production remains the one with the greatest impact on the environment, followed by lamb and pork

General environmental impact (average, on an 8 point scale)



	Jun'16	Jun'17	Jun'18
Beef	5.5	5.6	5.5
Lamb	4.8	4.9	4.9
Pork	4.7	4.9	4.8
Veal	4.6	4.6	4.5
Seafood	4.4	4.5	4.5
Chicken	4.4	4.4	4.4
Goat	4.2	4.3	4.2
Kangaroo	4.0	4.0	4.1



A11. Please rate each type of meat according to their impact on the environment
Base: MGB/MMP who are non-rejectors of red meat (i.e. must eat beef and/or lamb) n=1425