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Australian consumers' perceptions of sustainable foods

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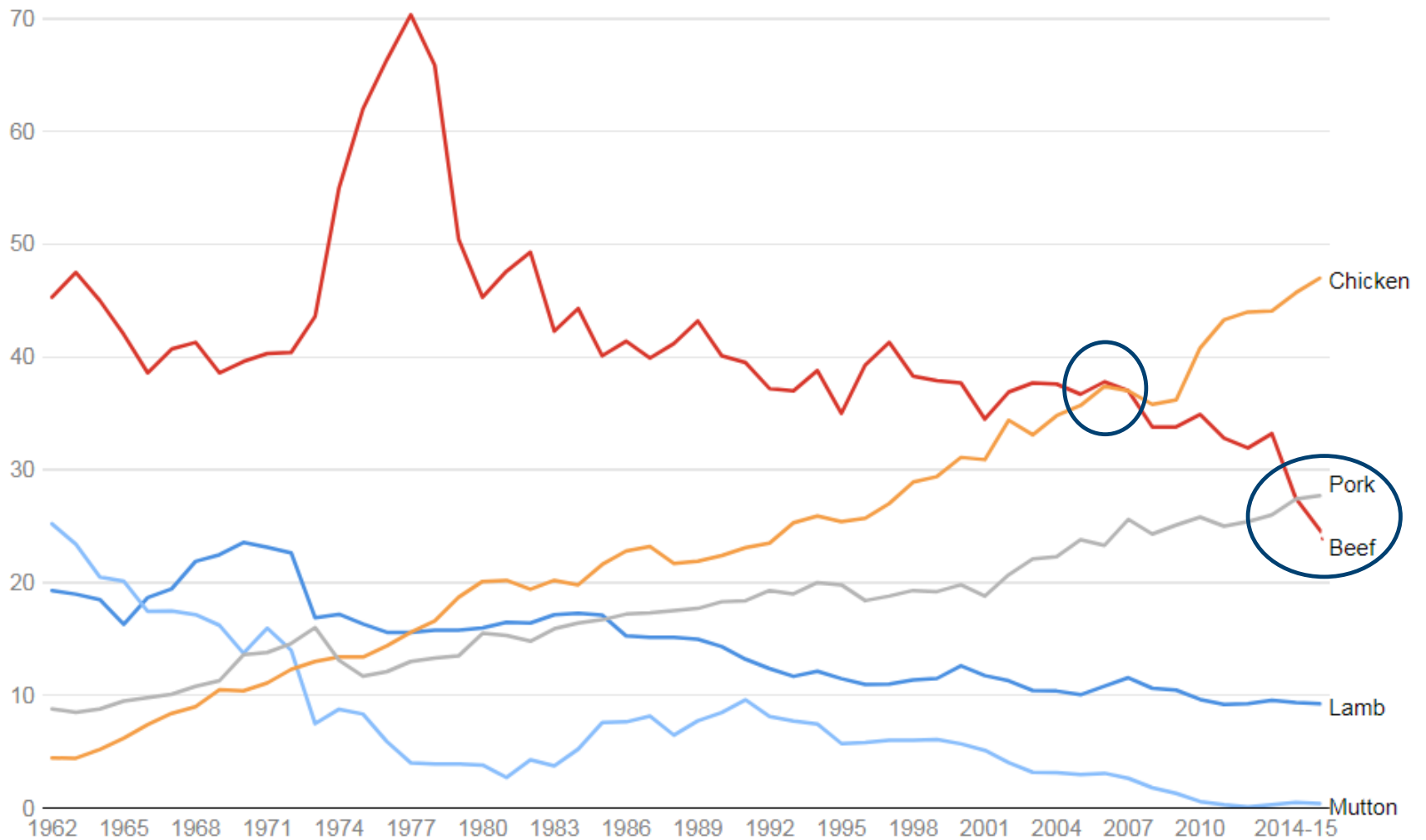
Background

- Collective sustainability standards are being adopted by the global food industry
 - Measurable indicators include
 - Environmental
 - Economic
 - Social
 - Improvement in one measure (e.g. environmental) may adversely impact other sustainability measures (e.g. economic or social) in the short and/or long run.
 - E.g. improvements in animal welfare or the environment, may come at an economic cost
 - Which of these indicators are important to consumers' perceptions of sustainability?
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Environmental impact of meat production

- Meat production is resource intensive
 - Requiring: land, animal feed, energy and water
- Livestock industry responsible for estimated 18% of human-caused greenhouse gases (FAO, 2006)
- Production of red meat (beef and lamb) in particular, has significant negative environmental consequences
- Australia consistently identified as one of the top meat eating countries
 - Average Australian consumed 92.5kg meat in 2015
- But meat consumption patterns are changing...

Meat consumption in Australia (kilos, per capita, by type) 1962-2016



Beef, mutton and lamb were once the most commonly consumed meats in Australia. Now, chicken is by far the most widely consumed meat, followed by pork.

Vegetarianism is increasing

- Prevalence of vegetarianism in Australia has increased in recent years
 - 11.2% consuming a vegetarian or mostly vegetarian diet in 2016
 - 15% increase from 2012, on the back of a 20% increase in vegetarianism from 2009 to 2013 (Roy Morgan 2014)
- The decision to become vegetarian can be driven by a range of reasons including different perceptions, beliefs, and concerns



- Most of the literature around drivers of vegetarianism or reduced meat consumption, and attitudes to meat consumption is from the US, UK, Canada and Europe.
- Data is lacking on the range of factors driving the increasing trend towards vegetarianism, or mostly meat-free diets, in Australia.

Objectives

- Examine consumer perceptions and values regarding sustainability
- Understand factors motivating recent changes in meat consumption patterns in Australia
 - 1) Identify reasons for reducing meat consumption
 - 2) Identify the importance of environmental protection and animal welfare as reasons for reduced meat consumption relative to other concerns
 - Investigate whether future improvements in sustainability standards are likely to lead to increased meat consumption
- Examine willingness to reduce or avoid meat consumption

Study sample and data collection

- Online survey conducted July 2016
- Panel provider (Pureprofile)
- Total sample n = 379 Australians, age 18 and older
- Two study samples recruited
 - 1) Targeted vegetarians, n=51
 - 2) General population, n=328
- From general population there were 31 “meat avoiders” (9.5%)
- N=10 respondents excluded (due to inconsistent responses)

‘Meat-eaters’ n=287

‘Meat-avoiders’ n=82

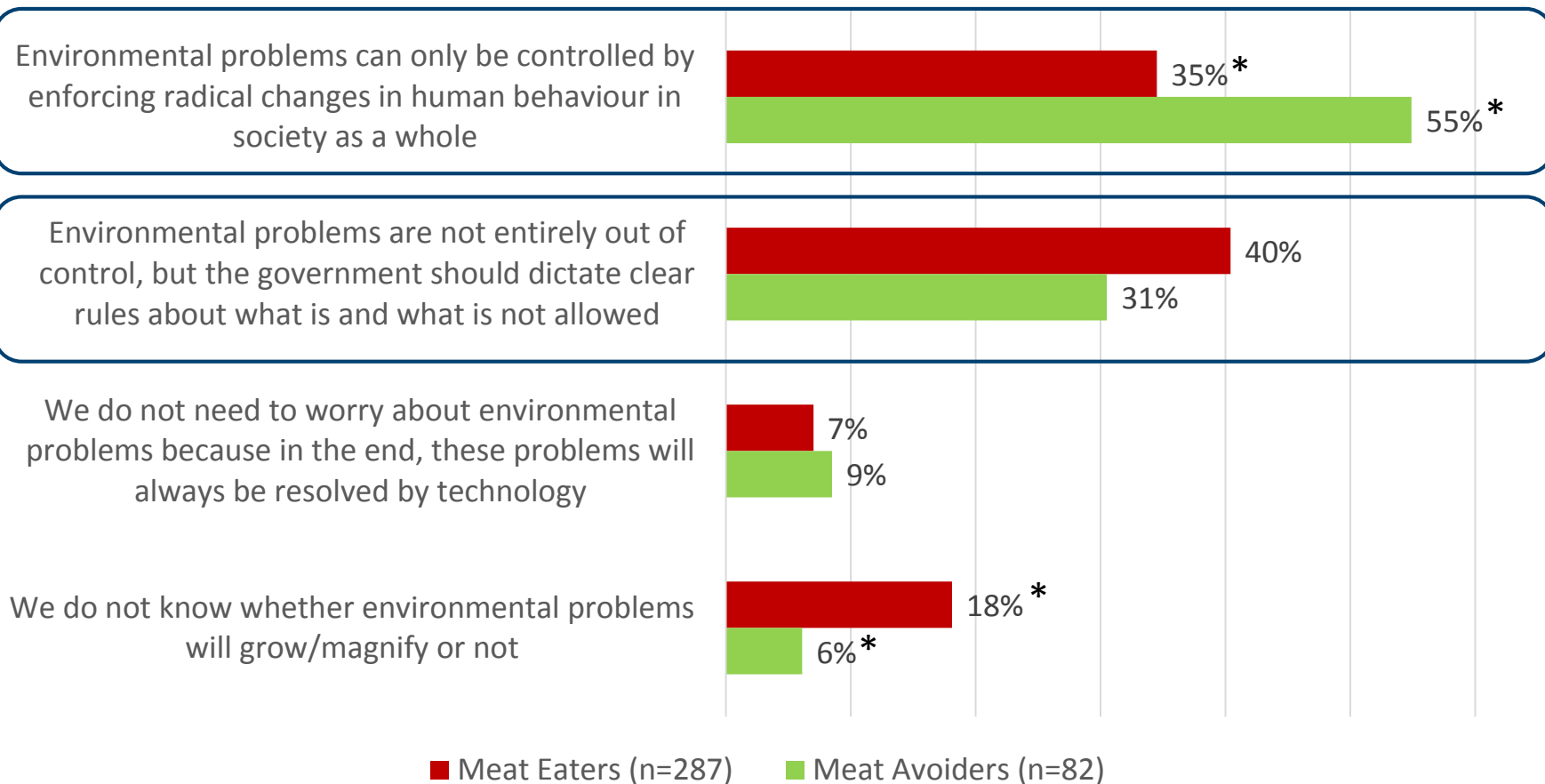
Meat Eaters (n=287)

- Nationally representative of Australian meat buyers with respect to:
 - gender, age, location (metro areas) (Roy Morgan 2015)

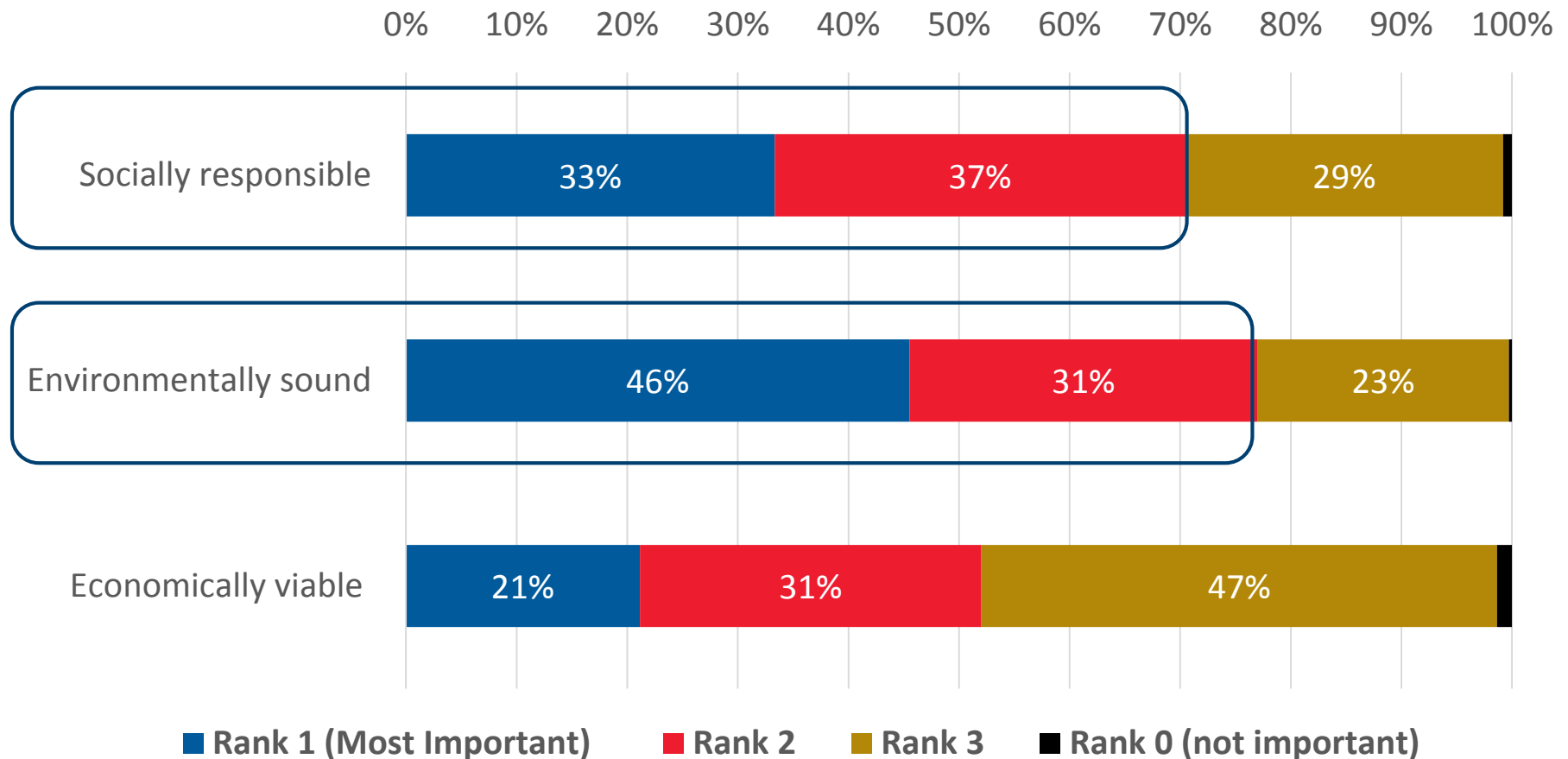
	n	%
Beef	279	97.2
Chicken	281	97.9
Pork	251	87.5
Lamb	255	88.9
Fish and seafood	260	90.6
Dairy products (including milk, cheese and yogurt)	283	98.6

Please indicate which one of the following statements corresponds most with your view on the environment (only one answer possible)

0% 10% 20% 30% 40% 50% 60%



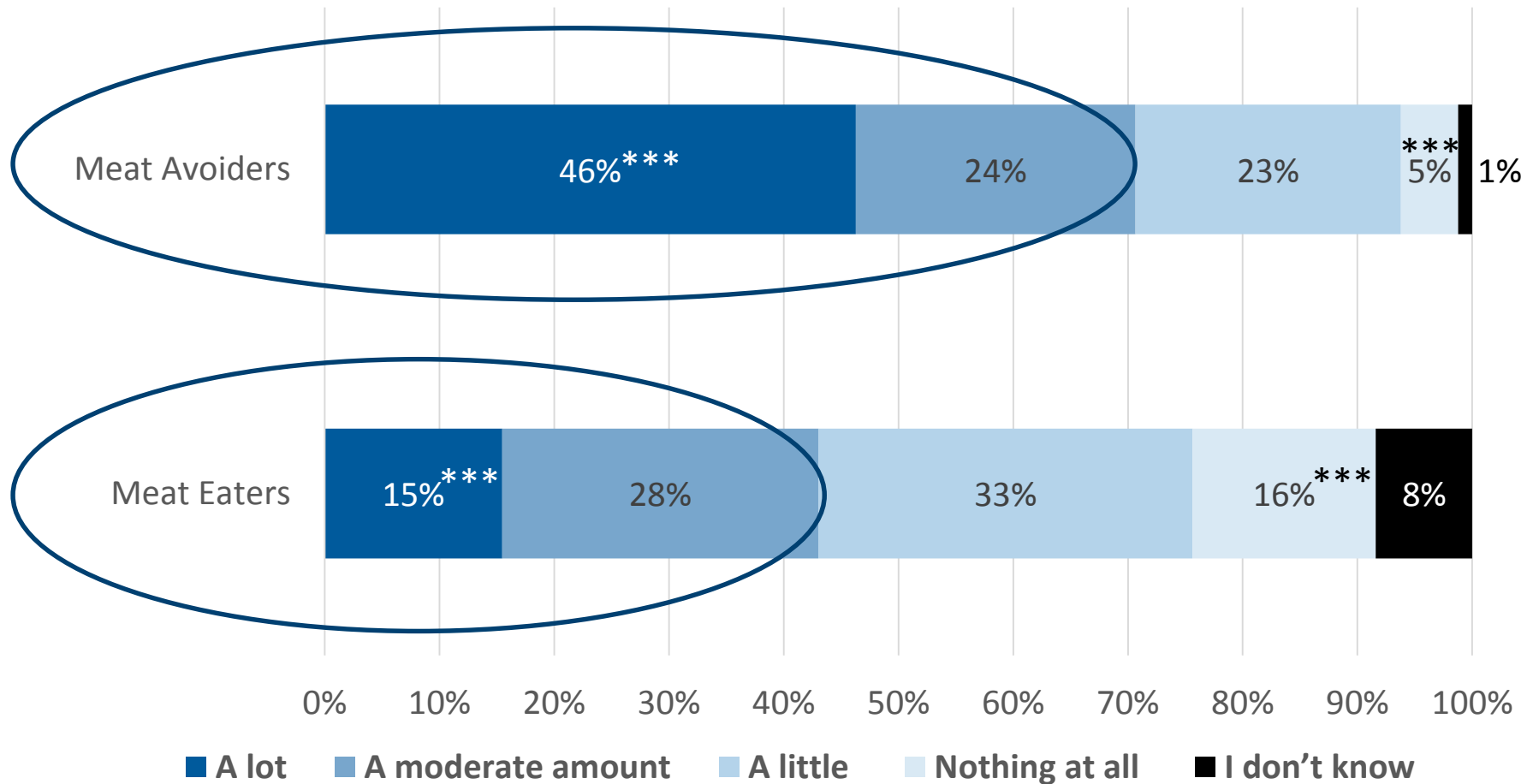
Relative importance of characteristics used to describe sustainable food systems



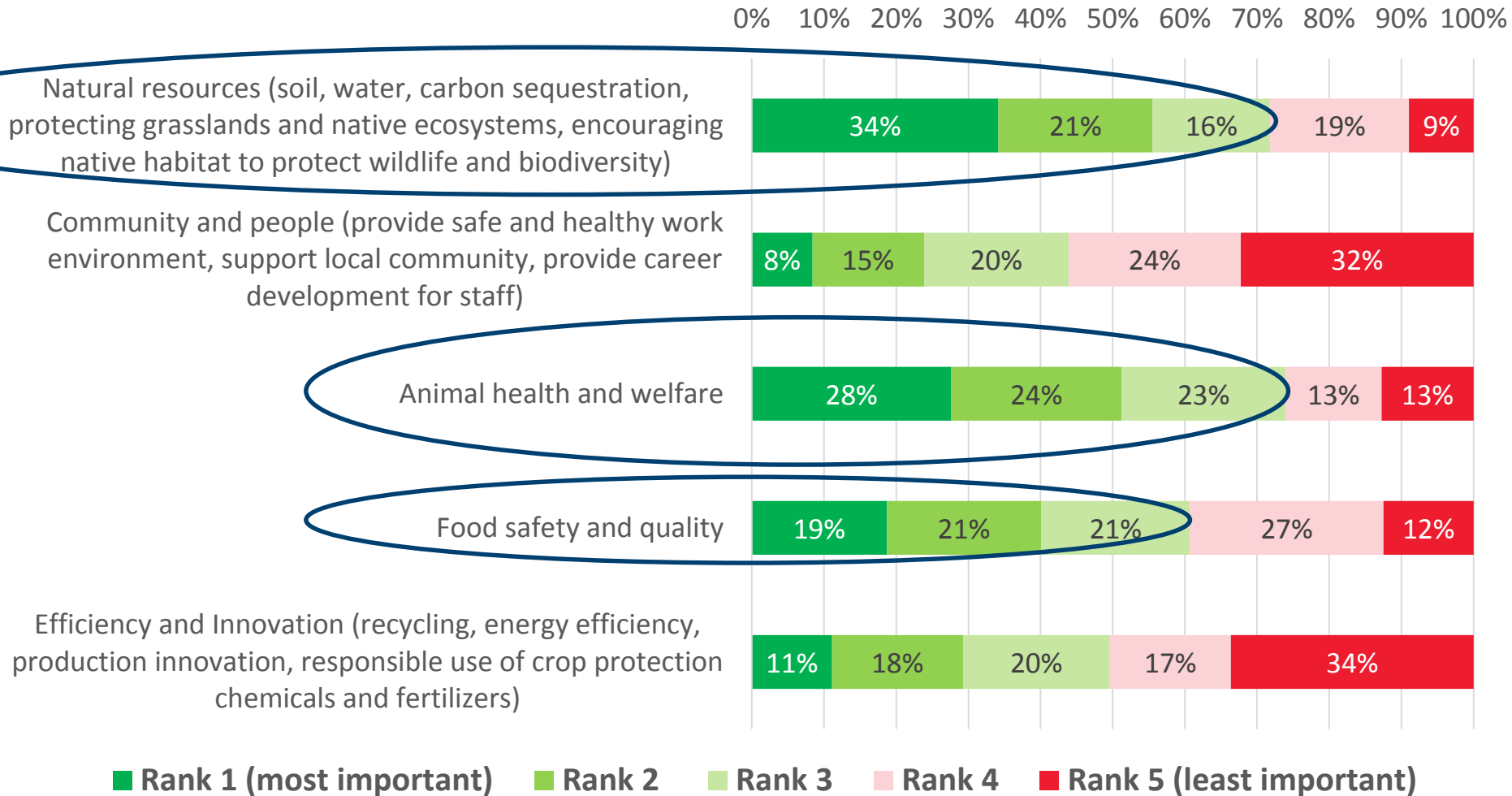
- **Meat-avoiders:**
 - less likely to rank ‘Environmentally sound’ 3rd (11% vs. 26%, $P=0.032$)
 - less likely to rank ‘Economically viable’ 2nd (22% vs. 33%), and more likely to rank it 3rd (63% vs. 42%, $P=0.007$)

How big a part, if any, do you think each of the following activities play in the human contribution to climate change?

‘Farming the meat and dairy products that we eat and drink’

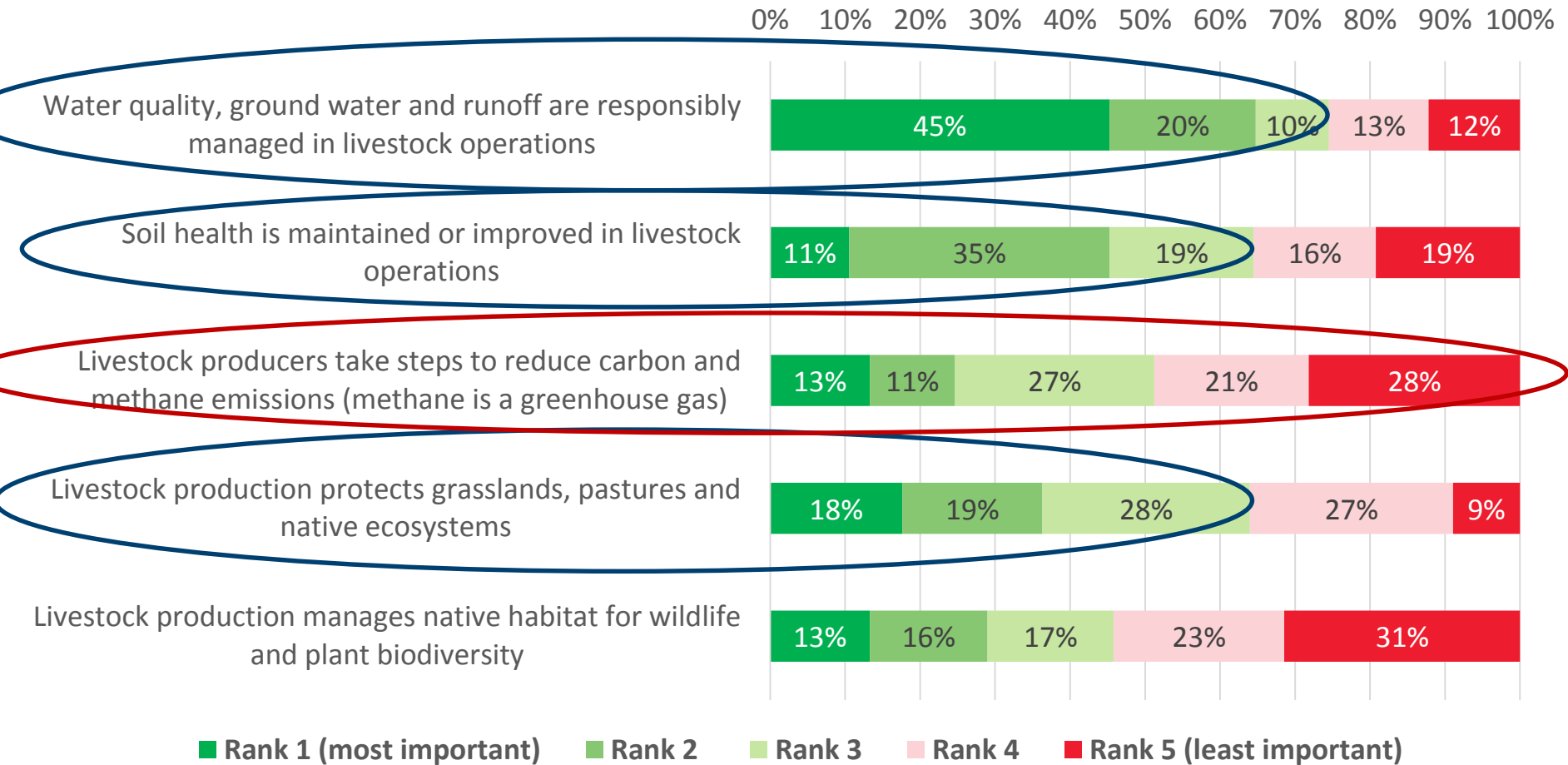


In your mind how important are each of the following in improving the sustainability of livestock industries? (n=369)



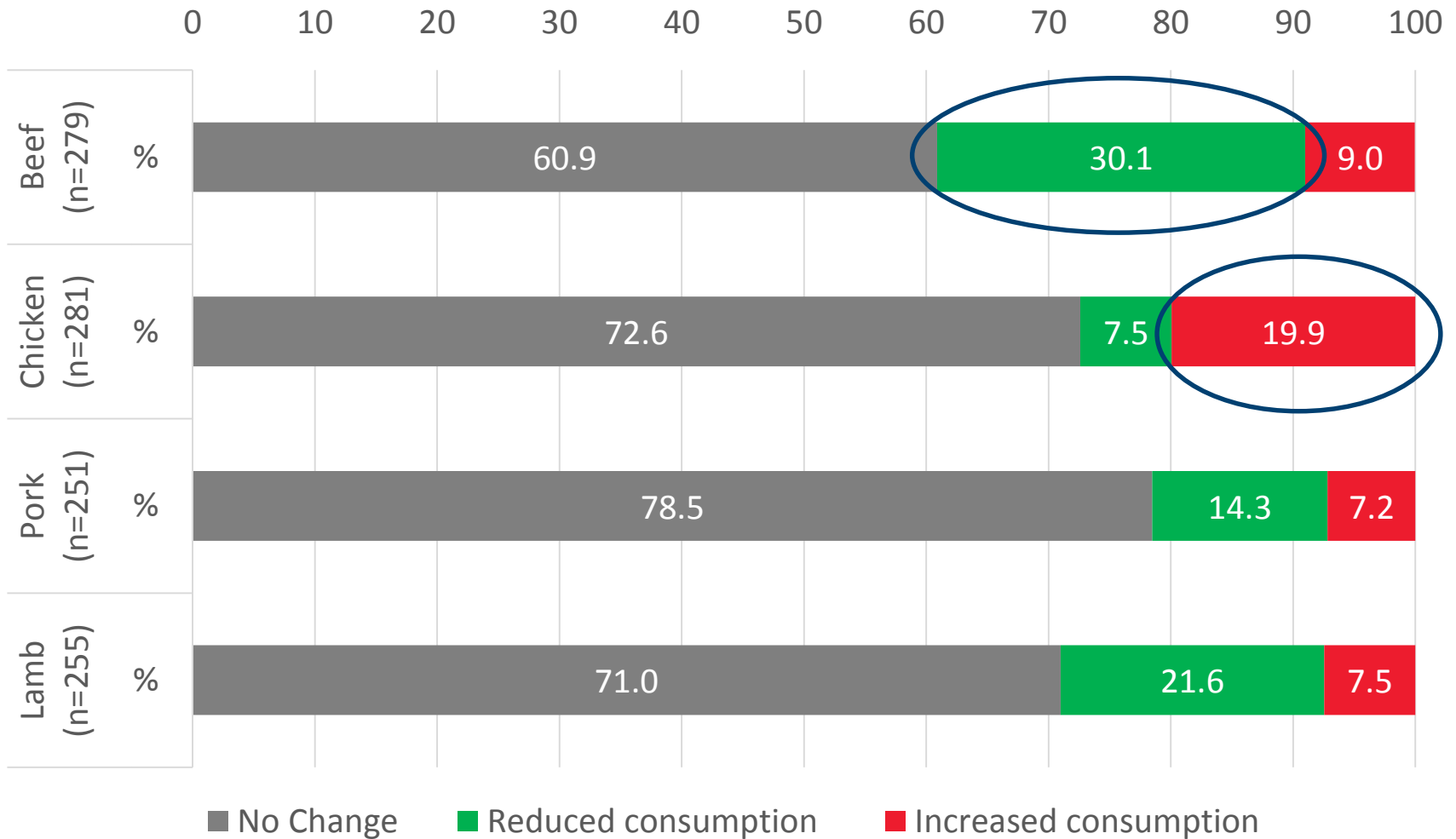
- Meat-eaters more likely to rank **food safety and quality** as **most** important (22% vs. 6%, P=0.016)
- Meat-avoiders more likely to rank **animal health and welfare** as **most** important (43% vs. 23%, P=0.008)

In terms of the sustainability of natural resources used in meat production please rank the following characteristics in terms of their importance (n=369)

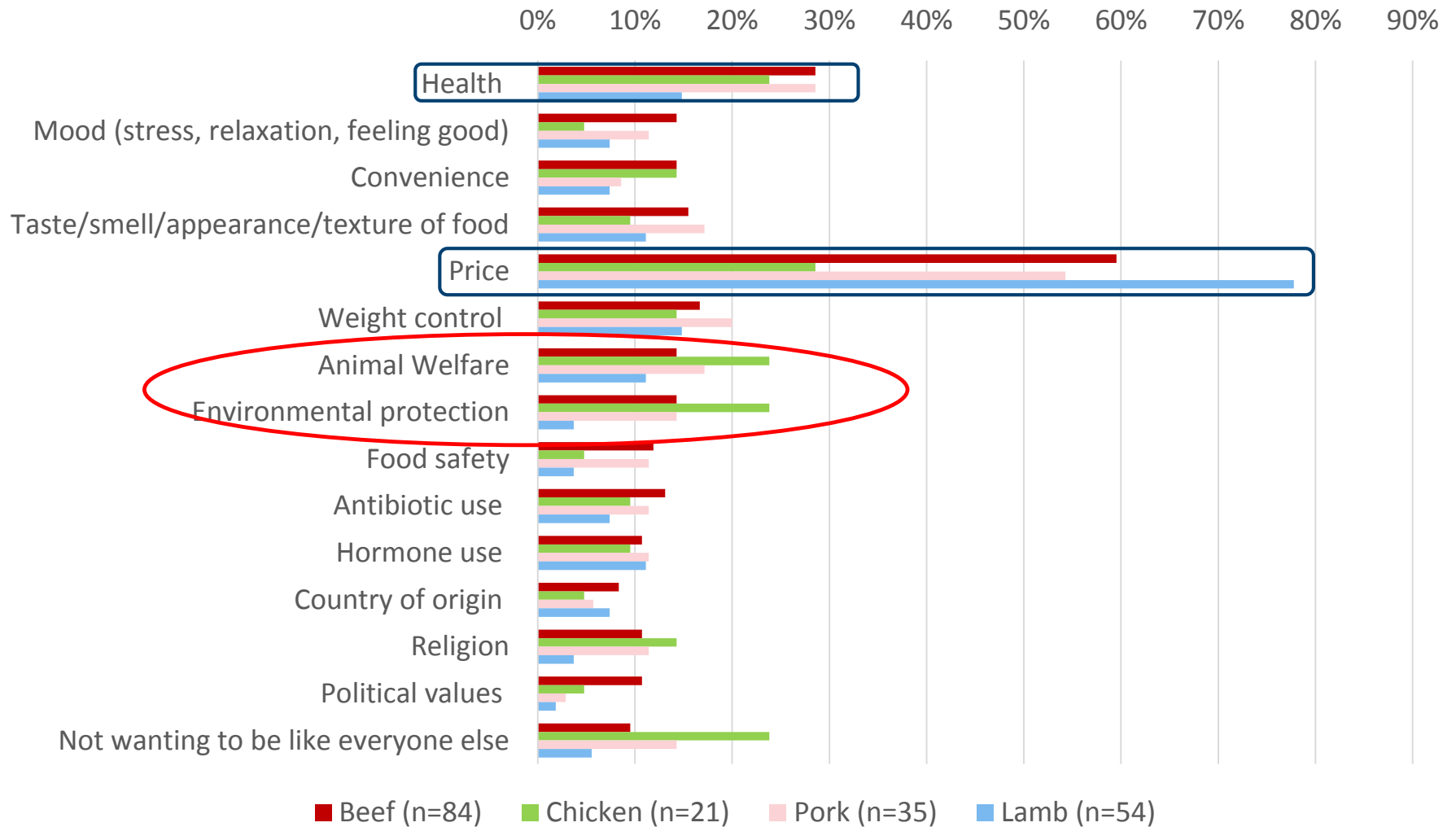


- Meat-eaters more likely to rank 'Livestock producers take steps to reduce carbon and methane emissions' as **least** important (32% vs. 16%, P=0.018)

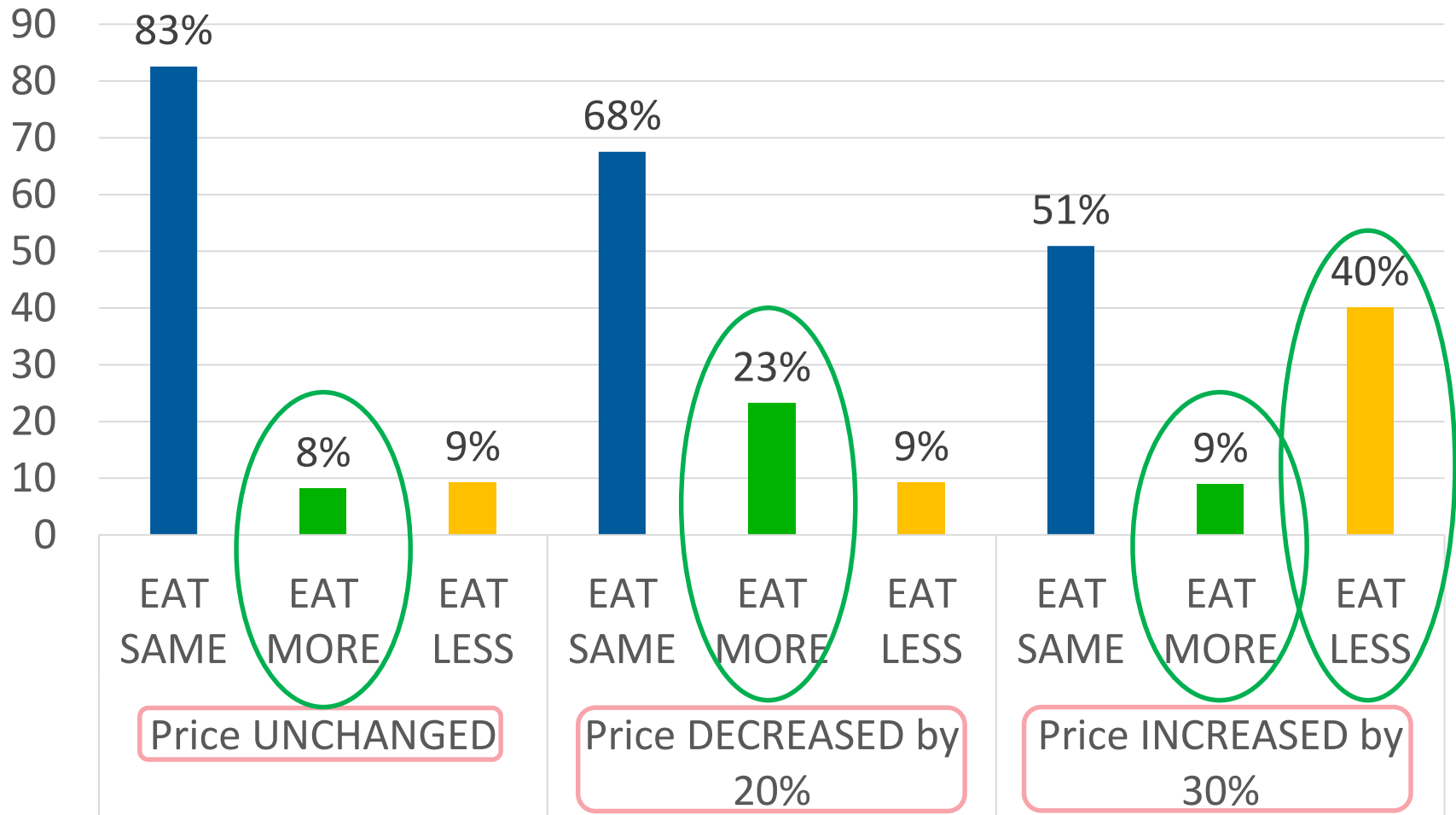
54% of meat eaters made a recent change to meat consumption frequency



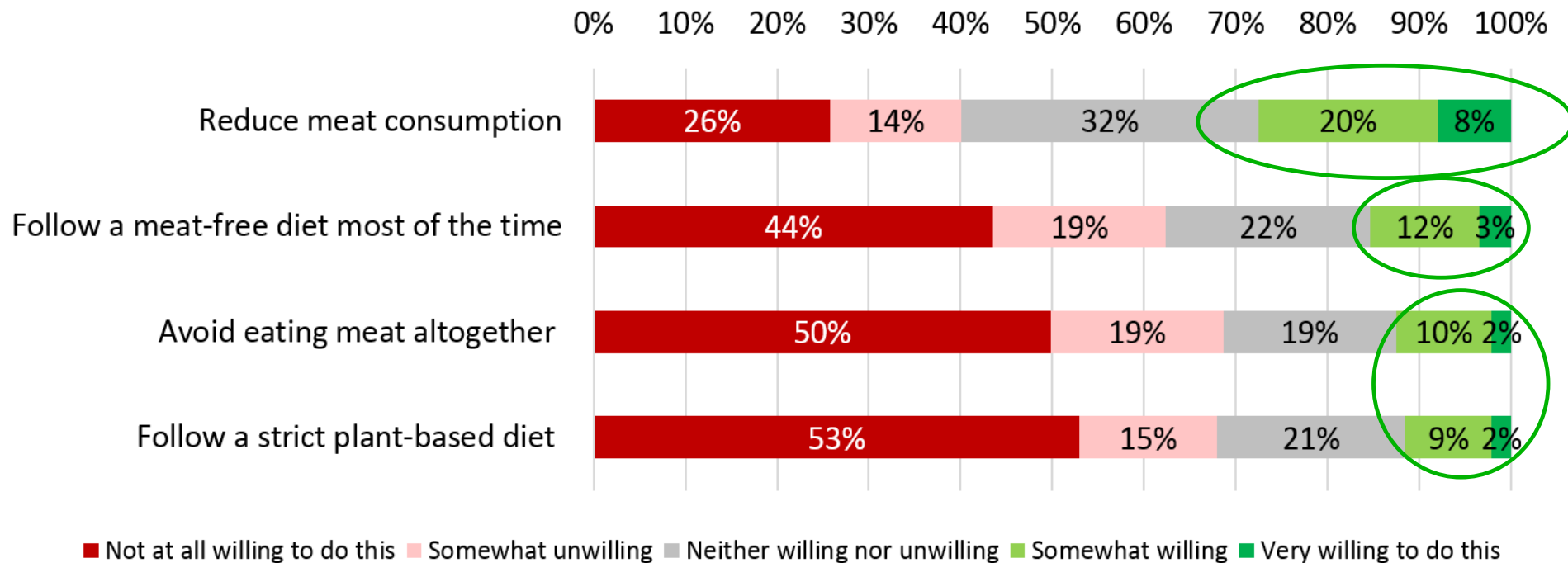
Main reasons for reducing meat consumption



Self-predicted changes to meat consumption in the situation that all meat products are verified to be 'produced sustainably' under different price conditions (n=287 meat eaters)



Willingness of meat-eaters to change their meat consumption in the coming weeks (n=287)



Summary

- Importance of characteristic used to describe sustainable food systems
 - Environmentally sound > socially responsible > economically viable
- Meat-avoiders more likely to believe that meat production has negative environmental impact
- Differences in views regarding who is responsible for controlling environmental problems
 - Meat-avoiders: individuals/changes in human behaviour needed
 - Meat-eaters: government should make clearer rules
- 3 in 10 meat eaters willing to reduce consumption suggesting that increase in prevalence of vegetarianism is likely to continue



Thank you!

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