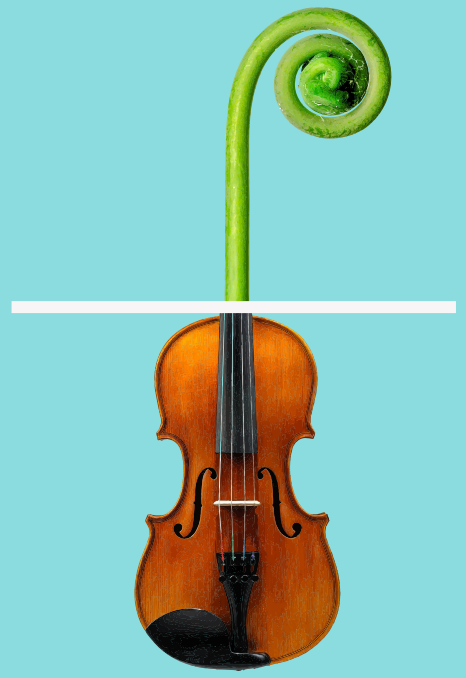
Howard Parry-Husbands



Why vegetarians are becoming meat eaters

Understanding the difference between consumer perception and reality

March 2023

Pollinate

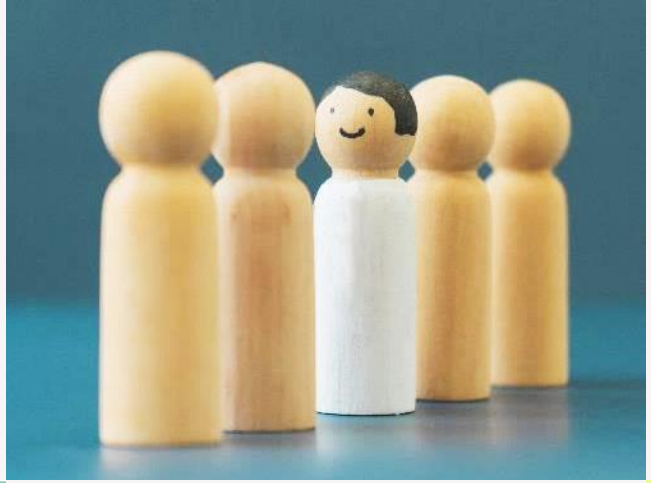
ZANDA MCDONALD award

Learn | Network | Experience | Grow

Pollinate acknowledges all Aboriginal and Torres Strait Islanders Traditional Custodians of Country and recognises their continuing connection to land, sea, culture and community. We pay our respects to Elders past, present and emerging.

INDEPENDENTLY OWNED

We are a full service brand & market research agency, independently owned & operated since 2003



WE PUT PEOPLE FIRST

20 Pollinators with an average tenure of 5+ years

We have a leading parental leave scheme, a team EAP & a Passion Grant each year...and more!

WE STAND BY OUR ETHICS

We will never work with tobacco or gambling clients

Pollinate is an AFR Sustainable Leader (2022)

We're going through B-Corp certification

FINANCIAL REVIEW
SUSTAINABILITY LEADERS 2022
IN ASSOCIATION WITH BCG

WE WORK FLEXIBLY

Our team manage their own time, with process to support collaboration

Every Friday is our time to work flexibly and focus, so while we may be working you won't hear from us

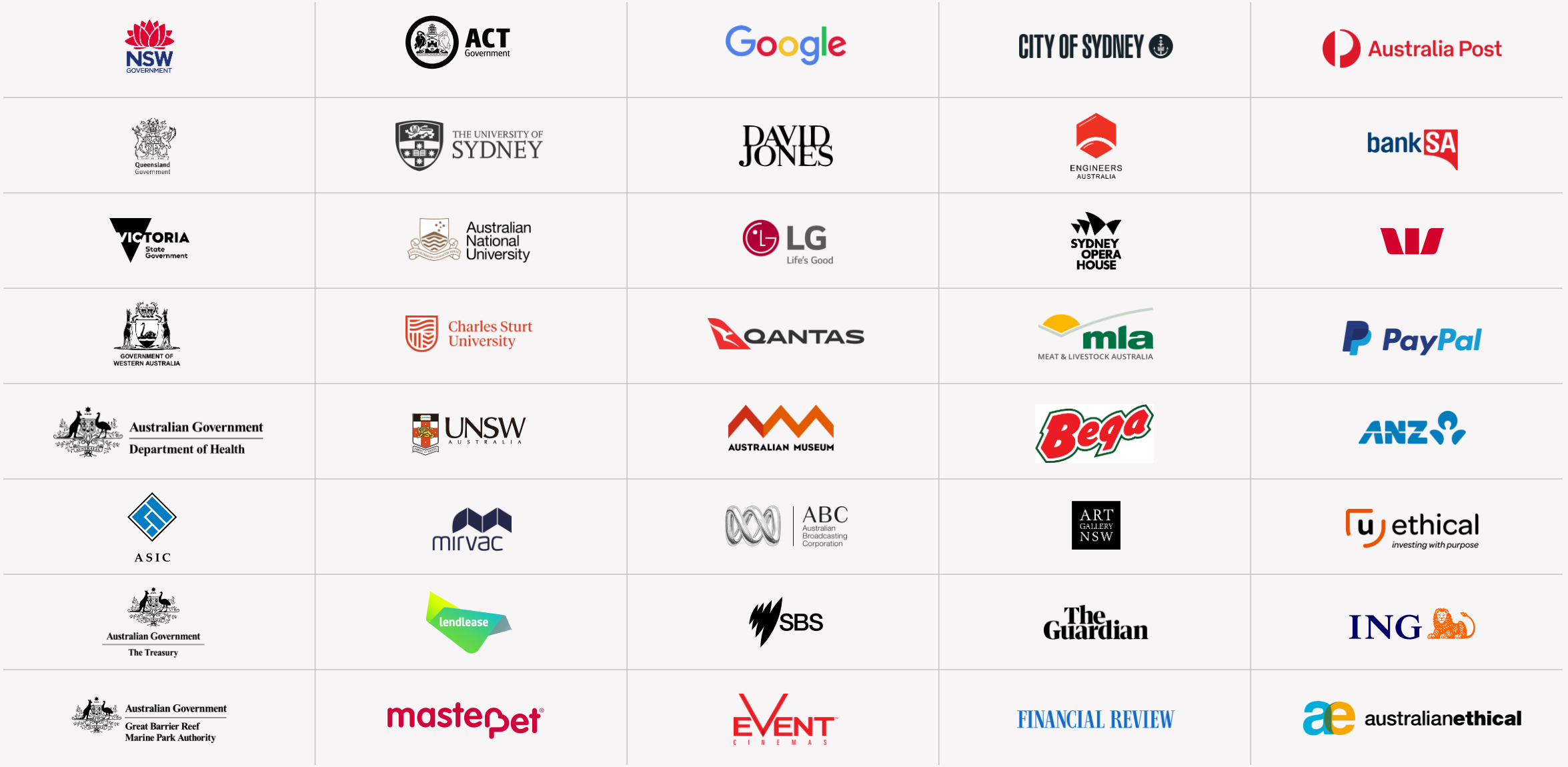
NATIONAL FOOTPRINT

With offices and team across Sydney, Canberra, Melbourne, Adelaide and a track record of running projects across; Asia, Europe and the United States

CERTIFIED

We are a member of The Research Society & are certified with ISO 20252 (the international operating quality standard for market & social research agencies)

Some of our clients



Contents

1 What does vegetarian mean? Challenging conventions

2 Meaning, identity and the fluidity of identity

3 The socio-cultural context & why people choose to become vegetarians

4 The paradox

5 Implications: reframe your thinking

1

What does vegetarian mean? Challenging conventions

7%

Metropolitan Australians say they are vegetarian

Question:
Are you a vegetarian? (%)

S7. Are you a vegetarian? 2022 Base. Total sample by wave n=1506

46%

of vegetarians say they also eat meat.

Question:
Do you eat any of the following? (%)

S7B. Do you eat any of the following? Base: Those who claim to be vegetarian n=100. “Meat” includes chicken and fish/seafood

What's the true picture? Why are nearly half of all vegetarians meat eaters?

7%

Vegetarians
in metro Australia

46%

Vegetarians
who also **eat meat**
occasionally

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

S7B. Do you eat any of the following? Base: Those who claim to be vegetarian n=100. "Meat" includes chicken and fish/seafood

2

Meaning, identity and the fluidity of identity

Question

Please put your hand up if you have ever seen an ugly baby?

(Be honest… ever at all…)

Question

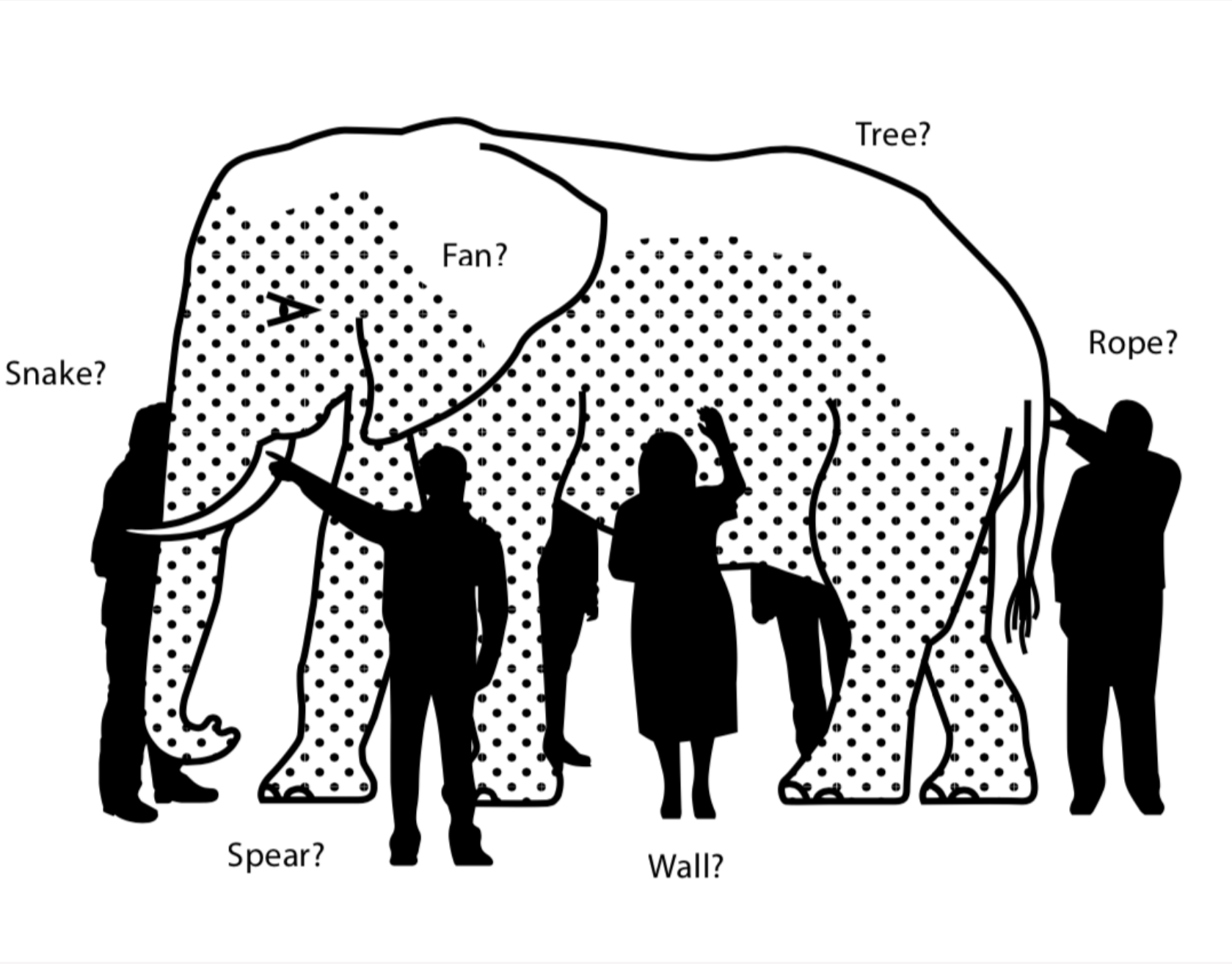
Now keep your hand up if your baby was/is ugly?

It’s all relative

The problem with ‘absolutes’.

They don’t’ exist.

There is a truth, there are multiple truths but there is not such things as the truth.



If I only eat meat occasionally...

Am I mostly vegetarian?

Am I vegetarian every Monday if I adhere to Meat-Free-Mondays?

Am I vegetarian if I eat fish? Chicken not red meat?

Prawns? Cheese? Milk? Oysters?

What is meat?

It is not called impossible because it tastes like plants.

If it looks like meat and it tastes like meat why isn’t it meat?

55%

of Australian schoolchildren have never visited a farm.

https://www.kidsnews.com.au/humanities/australian-kids-food-knowledge-is-on-the-slide/news-story/a3bfe684402fef43e0ec4ac545b4ada2

Australian kids' food knowledge is on the slide

Vanessa Croll, September 8, 2021 **7:00PM** News Corp Australia

50%

of Australian children could not identify a beetroot (or a leek)

https://www.kidsnews.com.au/humanities/australian-kids-food-knowledge-is-on-the-slide/news-story/a3bfe684402fef43e0ec4ac545b4ada2

So what is meat?

If familiarity with food production is so low does it matter to the consumer where it comes from?

It’s not like it’s easy to tell the difference at point of sale either...

In summary

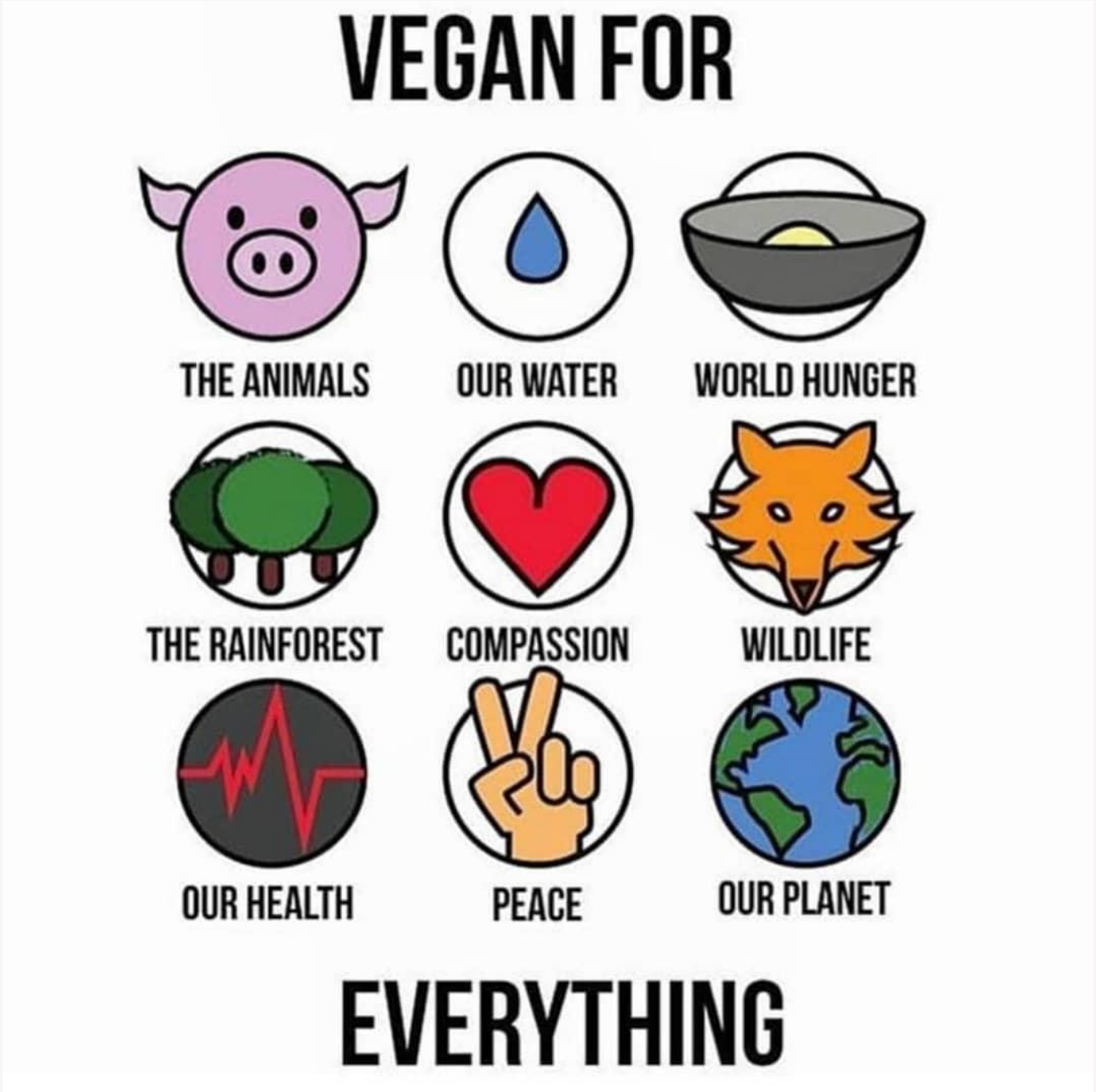
Meat, being a meat eater and being vegetarian mean different things to different people, at different times. It’s just not simple.

3

The socio-cultural context & why people choose to become vegetarians

The weight of morality

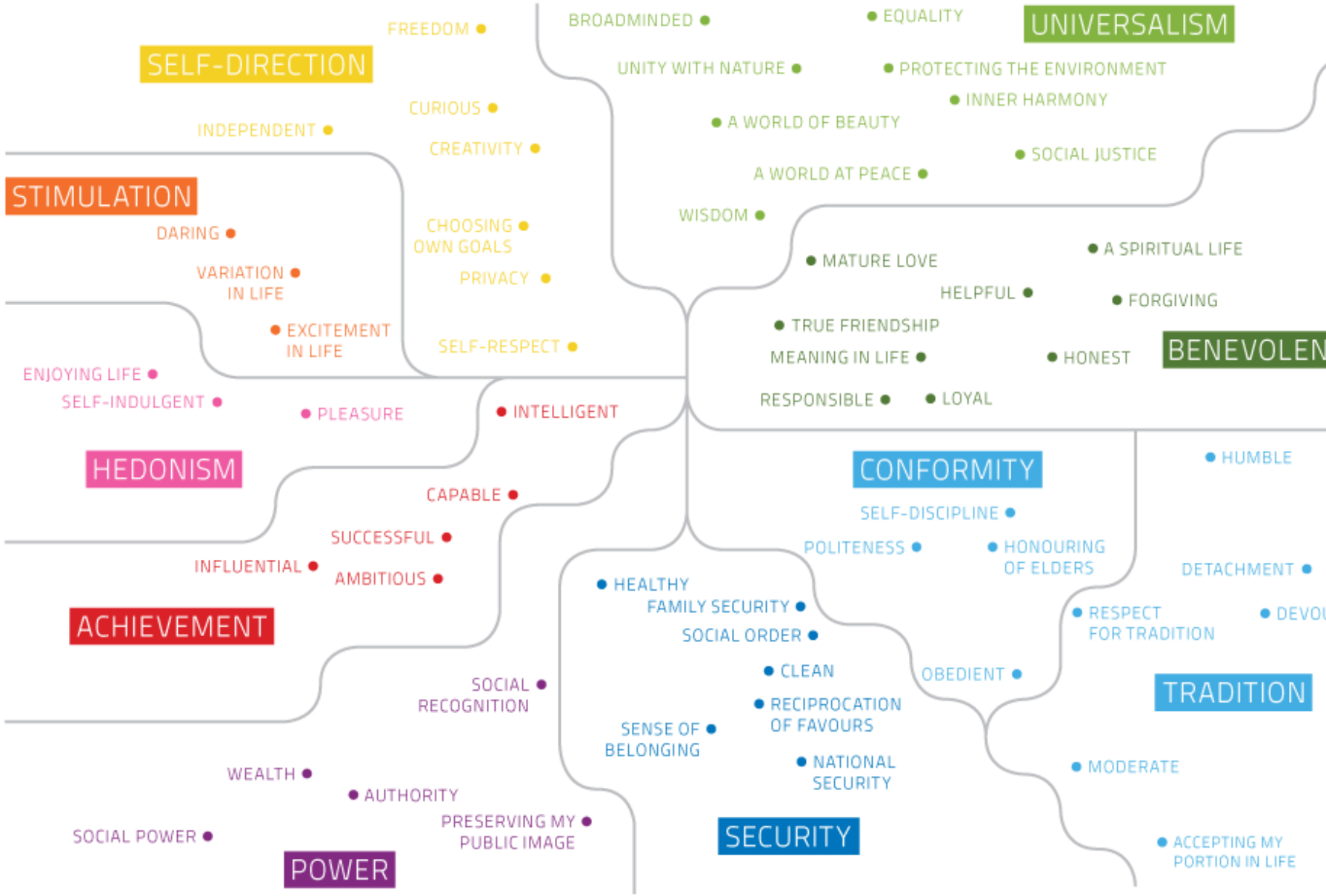
"There are a hundred reasons to become vegetarian but you only need one.
Once you become vegetarian you stack the other 99 on top"



Quote from Pollinate research for QSR brand developing plant-based meat alternative toppings

Values are universal

Our values determine our motivations, our goals and the choices we make. Different situations evoke different values



Australians aren’t blaming dairy farmers for their practices

They just want to buy ‘guilt free milk’

Consumer guilt, not animal welfare is our issue…

38%

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

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

You can’t ‘educate’ consumers out of guilt…

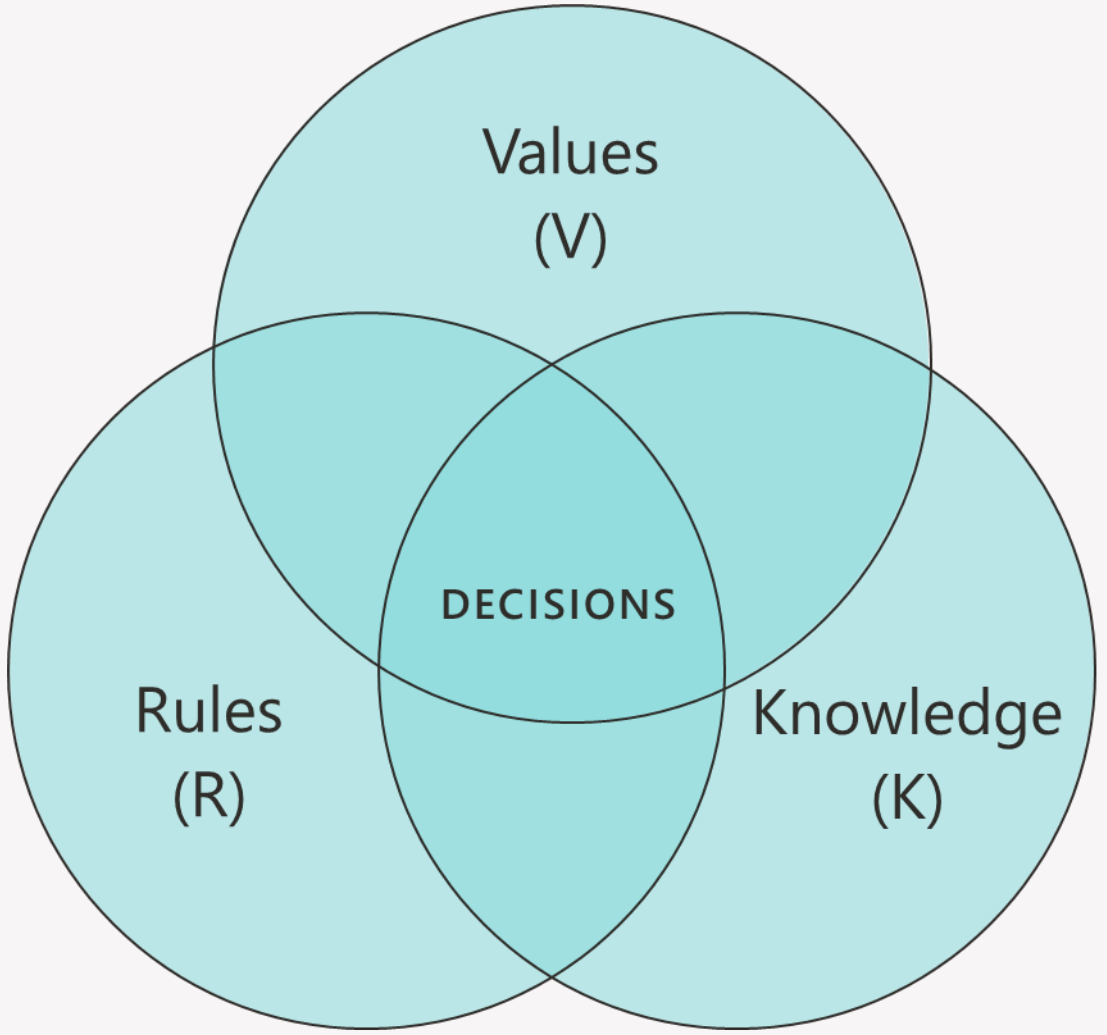
The emotional always tops the rational

VRK: Context determines the choices available

Is it desired? (Values)

Is it known?(Knowledge)

Is it allowed? (Rules)



'Rules-in-use' change as people adapt to changing societal values. Legislation lags public opinion (and struggles with the reality of multiple truths).

Pollinate were granted unique access most key beef markets to conduct global analysis in 2019 and 2022.

Asia Pacific

- Australia
- Singapore
- Hong Kong

North America

- USA
- Canada

South America

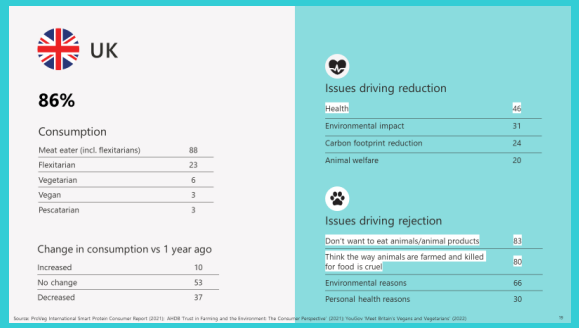
- Agentina

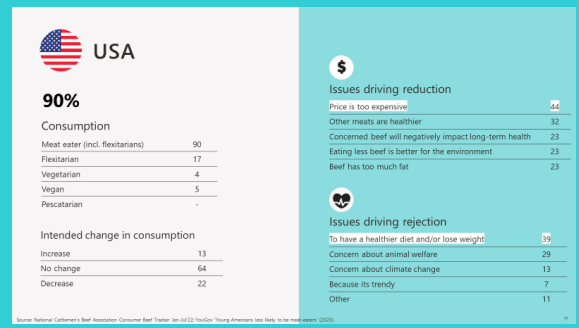
Europe

- UK
- Germany
- France
- Italy
- Netherlands

Looking across meat consumption trends and drivers of meat reduction and rejection in most major markets.

GLOBAL ROUNDTABLE FOR SUSTAINABLE BEEF

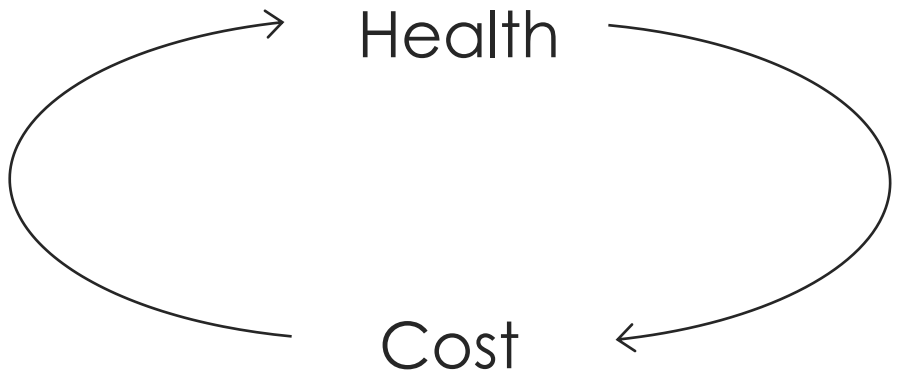




Flexitarianism (reducing) is driven by pragmatism

There are two drivers of reduced beef consumption and they are related:

1. Cost: "Beef is expensive and I save money by eating less meat".
2. Health: "And eating less meat makes me healthier"



This is a classic 'reinforcing loop'. One benefit directly reinforces the other.

This reinforcing loop logically explains the predicted reduction in meat consumption:

"Being healthy pays back and it pays to be healthy"

Vegetarianism (rejection) is driven by morality

There is a reinforcing loop to rejecting beef consumption:

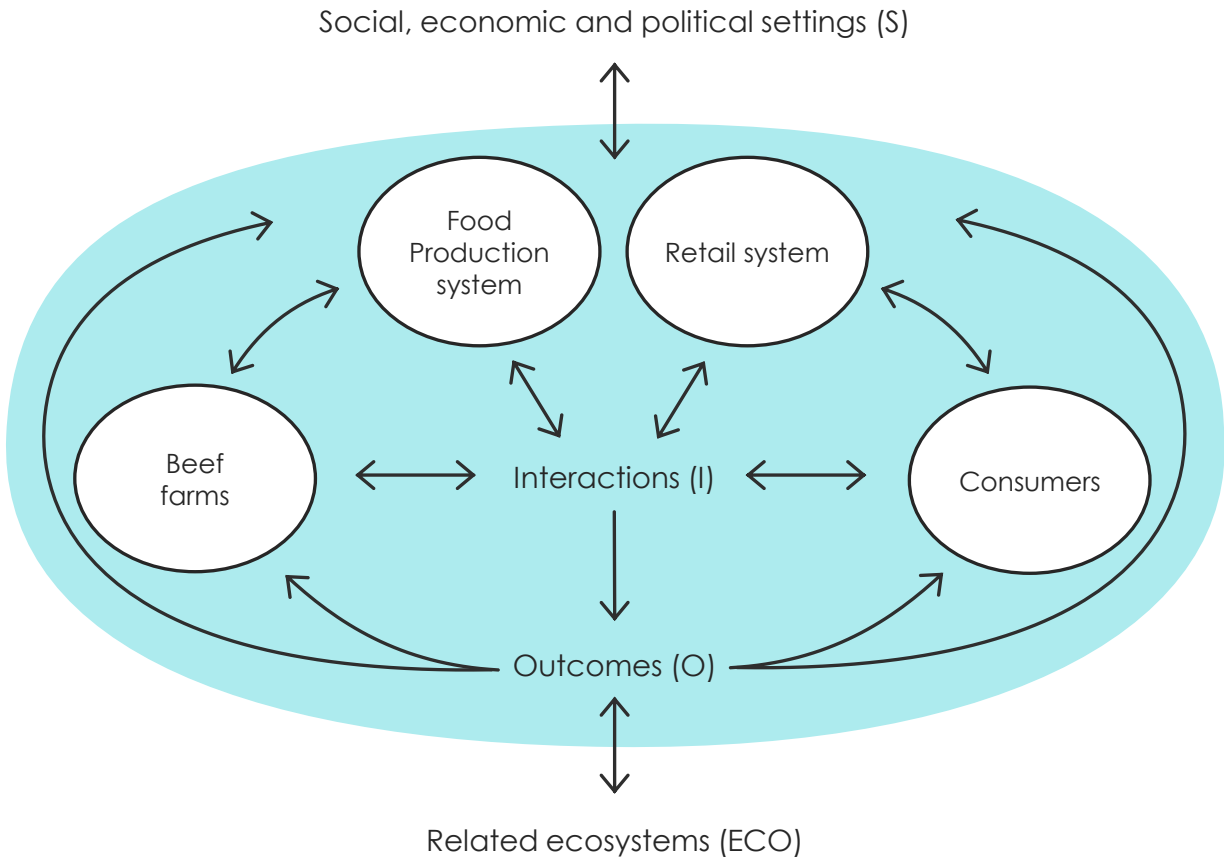
1. Animal welfare: Ethically it is unacceptable to eat meat.
2. Environment: Beef farming is bad for the environment.

This is a second 'reinforcing loop'. Giving up meat for animal welfare concerns directly makes me feel good about helping the environment

"Save the planet by saving the animals"

Beef production as a complex social-ecological system

Very broadly, based on Ostrom's basic model, 4 key sub-systems relevant to the two feedback loops can be mapped against wider elements of the system



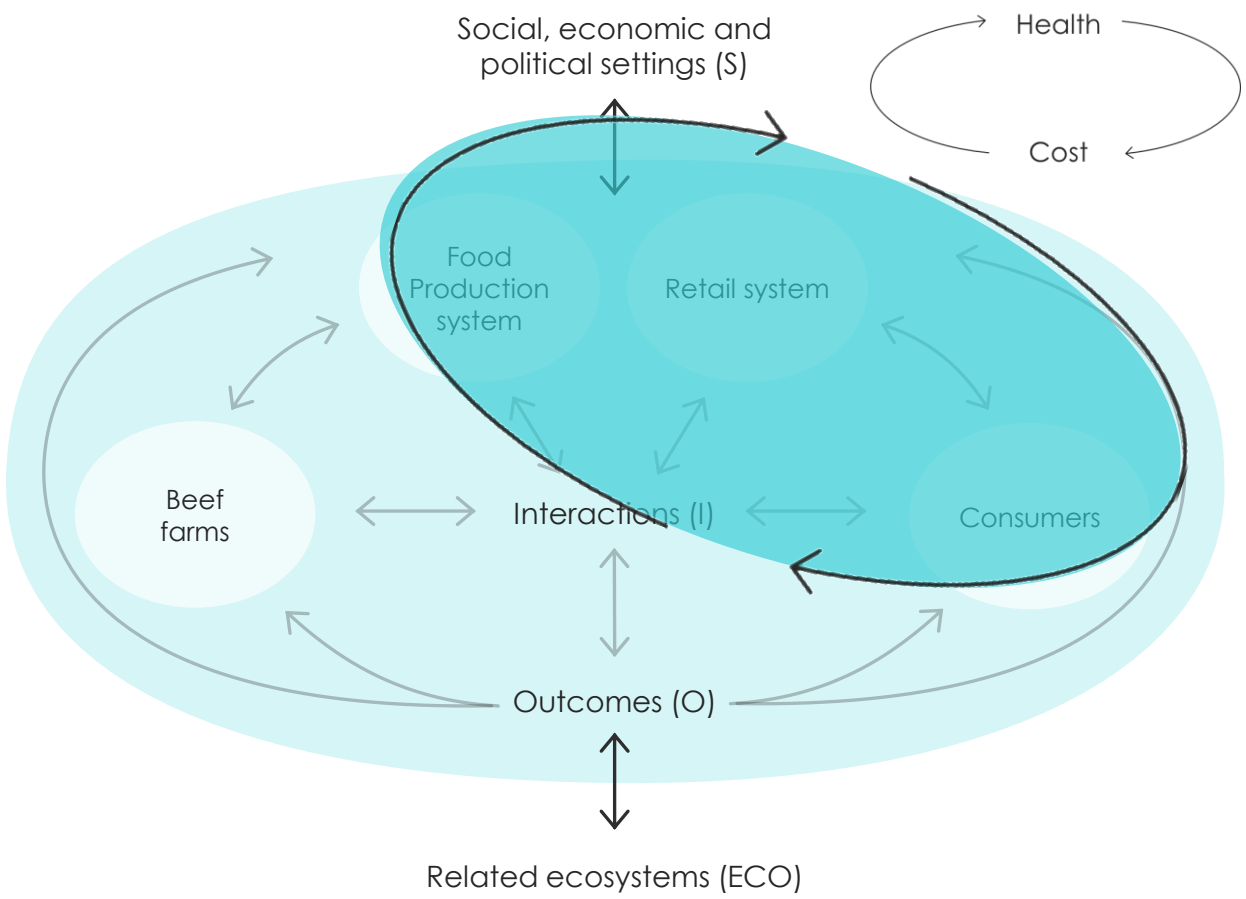
Adapted from Ostrom (2009) "A General Framework for Analyzing Sustainability of Social-Ecological Systems" (Science 325, 419 -422)

Overlaying the feedback loops across the the wider, complex system

The ‘reduction loop’ is an interaction between the users (people/consumers) and the wider economic settings

For the shopper/consumer concern for personal/family health aligns with financial concerns.

Reducing meat does ‘this’ (saves money) and also does ‘that’ (makes me healthier).



Becoming flexitarian resolves two anxieties: it pays to be healthy

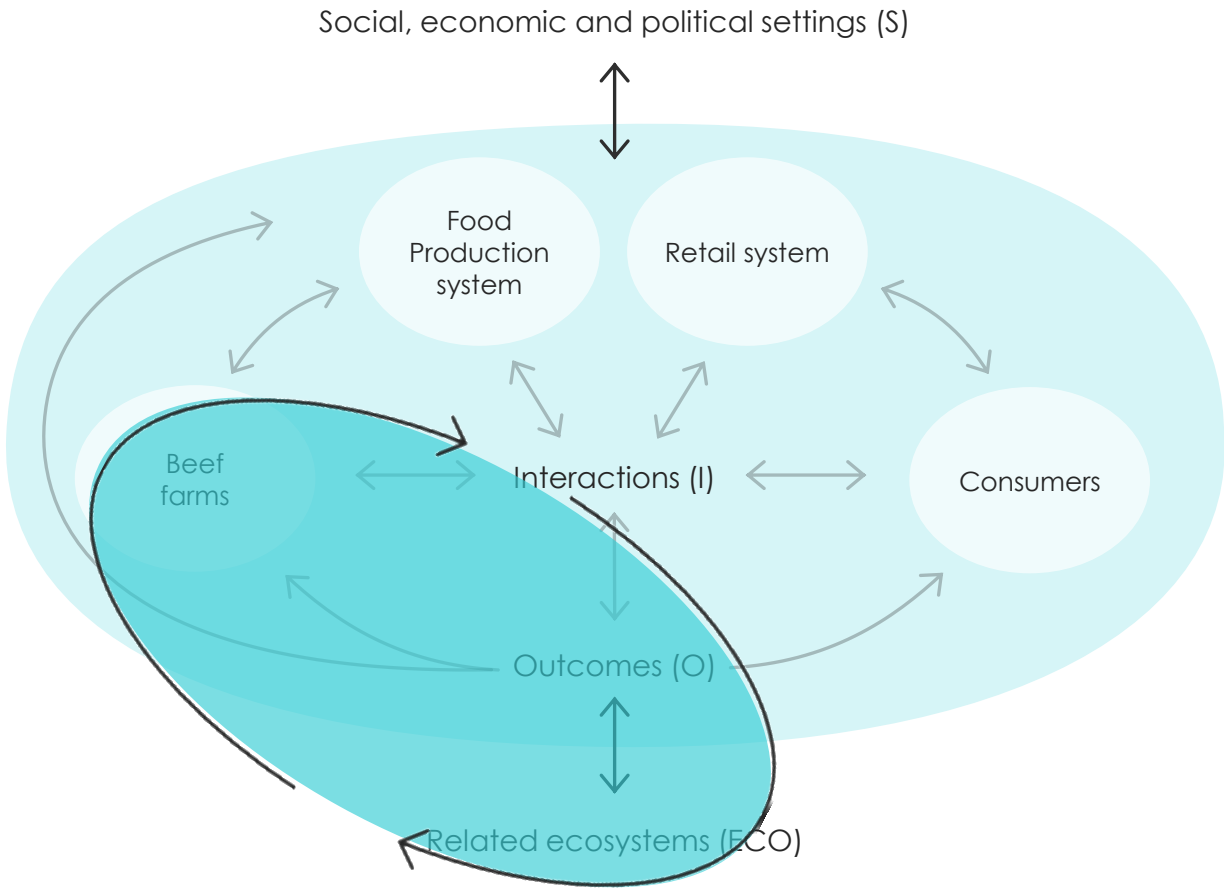
Overlaying the feedback loops across the wider, complex system

The 'rejection loop' is an interaction between the resource subsystem (beef animals) and the wider ecosystem.

Concern for animal welfare aligns with concerns for environmental degradation.

Becoming vegetarian does 'this' (relieves animal suffering) and also does 'that' (helps the environment).

Becoming vegetarian resolves two anxieties: save the planet by saving the animals

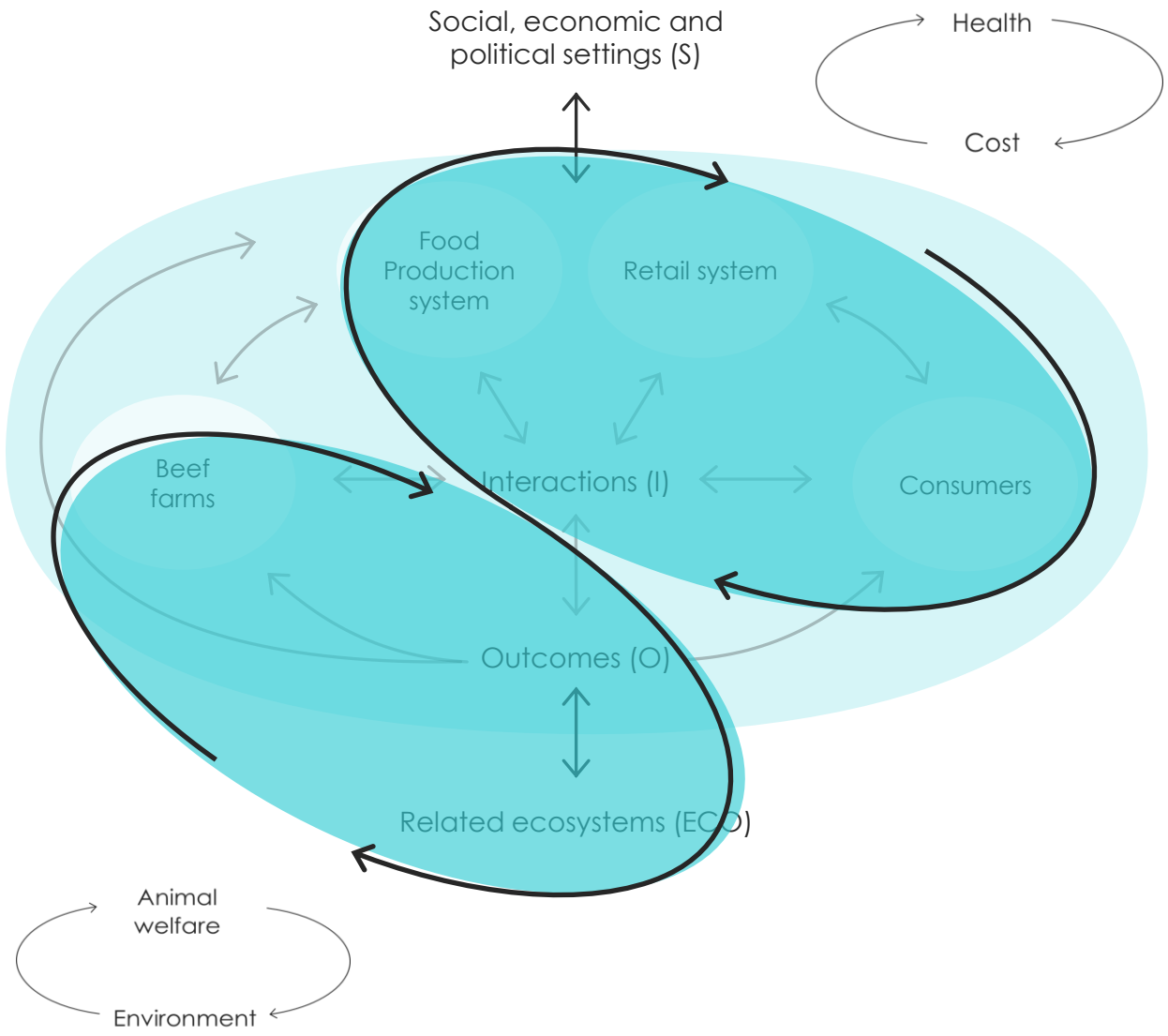


A ‘meta loop’ the two feedback loops are linked by their interactions

The two feedback loops themselves are mutually reinforcing: the benefits of Flexitarianism also link/reinforce the benefits of Vegetarianism.

This is evidence for a potent alignment of pragmatic and ethical drivers:

“It pays to be healthy and save the animals to save the planet”

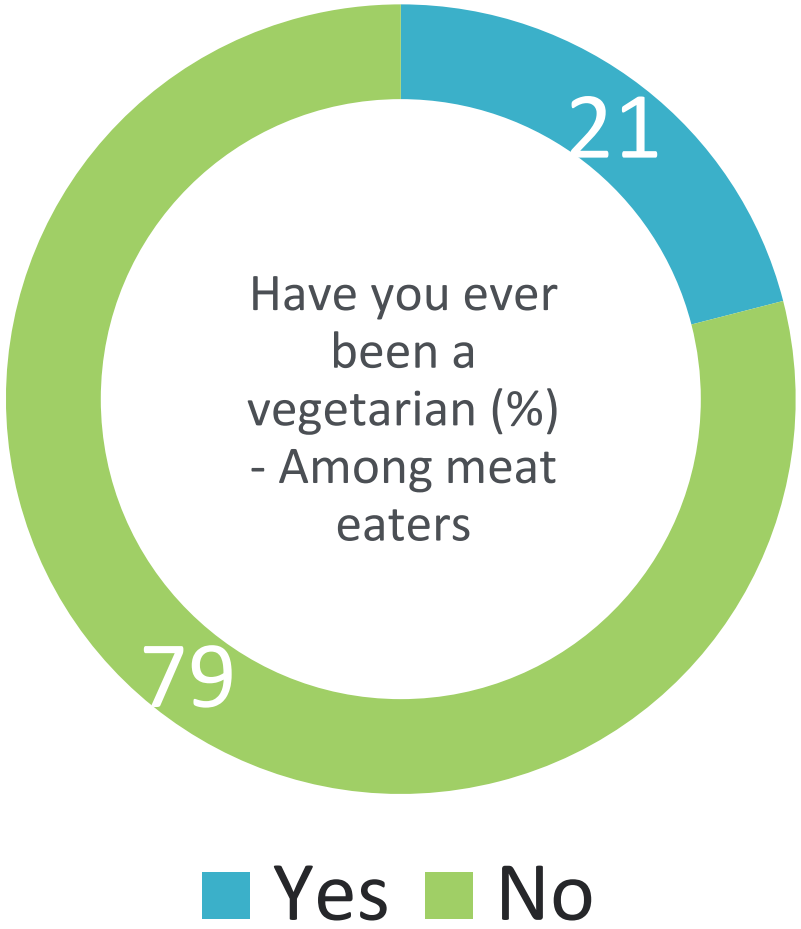


4
The paradox

21%

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

What made them switch back to eating meat?

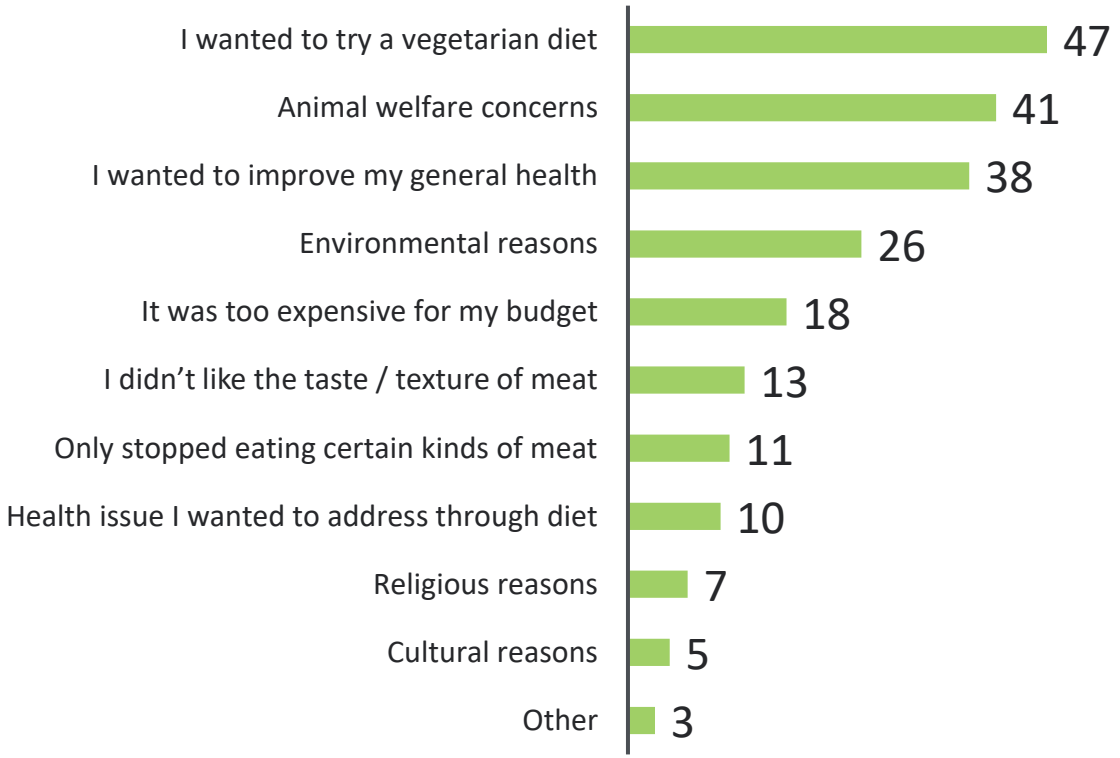


V6 Have you ever been a vegetarian (i.e. stopped eating meat for a while)? Base n=1394

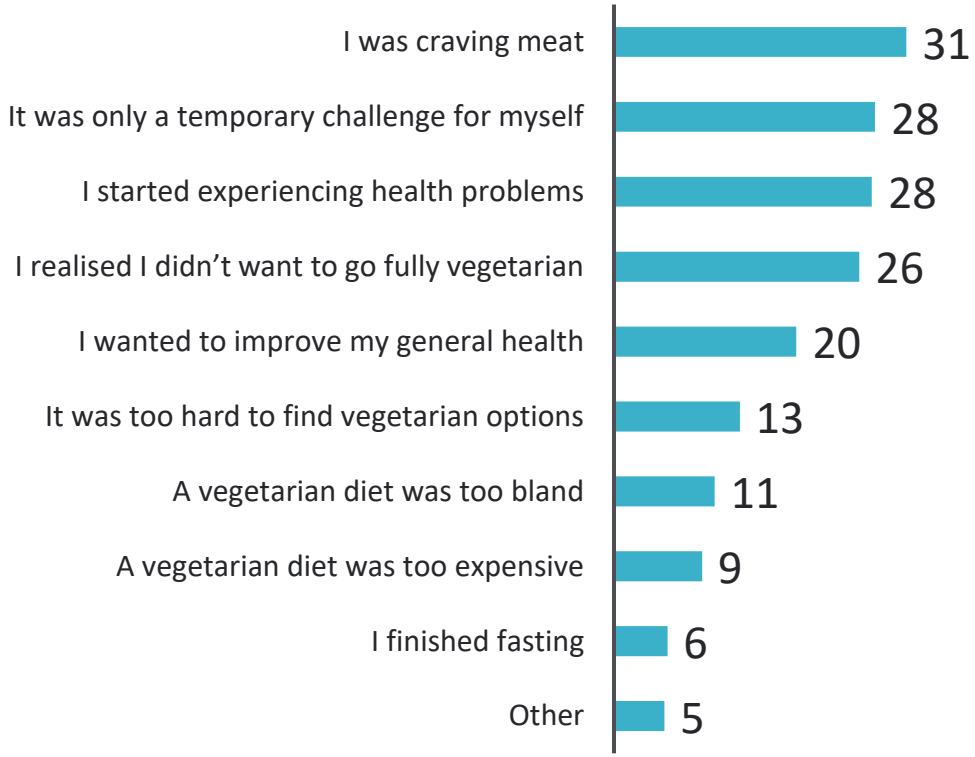
Ex-vegetarians tend to stop eating meat as a ‘test’, for animal welfare concerns or for health reasons; They start again due predominantly to health reasons

21%

Reasons stopped eating meat (%)
Among meat eaters who had stopped



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



. QV9 Why did you stop eating meat? QV10 And why did you start eating meat again? Base June 2022; Meat Eaters who used to be Vegetarian n=297

Health is also a feedback loop OUT of meat rejection

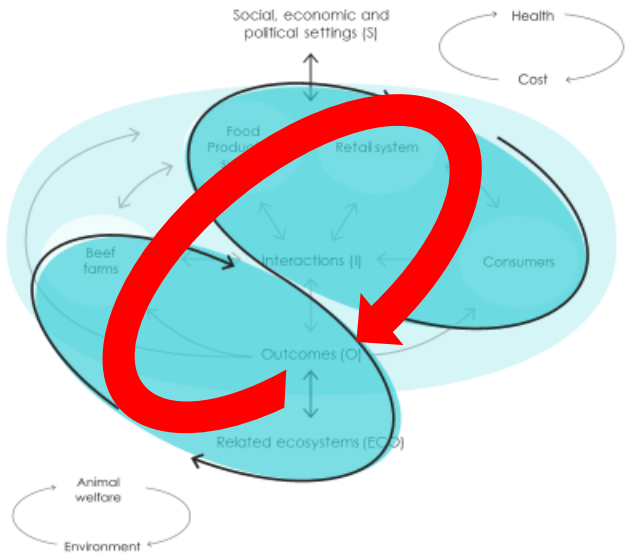
"It pays to be healthy and save the animals to save the planet ***unless this makes you unhealthy then its totally OK to eat meat again"***

A 'meta loop' the two feedback loops are linked by their interactions

The two feedback loops themselves are mutually reinforcing: the benefits of Flexitarianism also link/reinforce the benefits of Vegetarianism.

This is evidence for a potent alignment of pragmatic and ethical drivers:

"It pays to be healthy and save the animals to save the planet"



Pollinate 36

5

Implications: reframe your thinking

This is about consumers wanting to do ‘the right thing’…

Not about farmers doing the wrong thing

Australians just want…

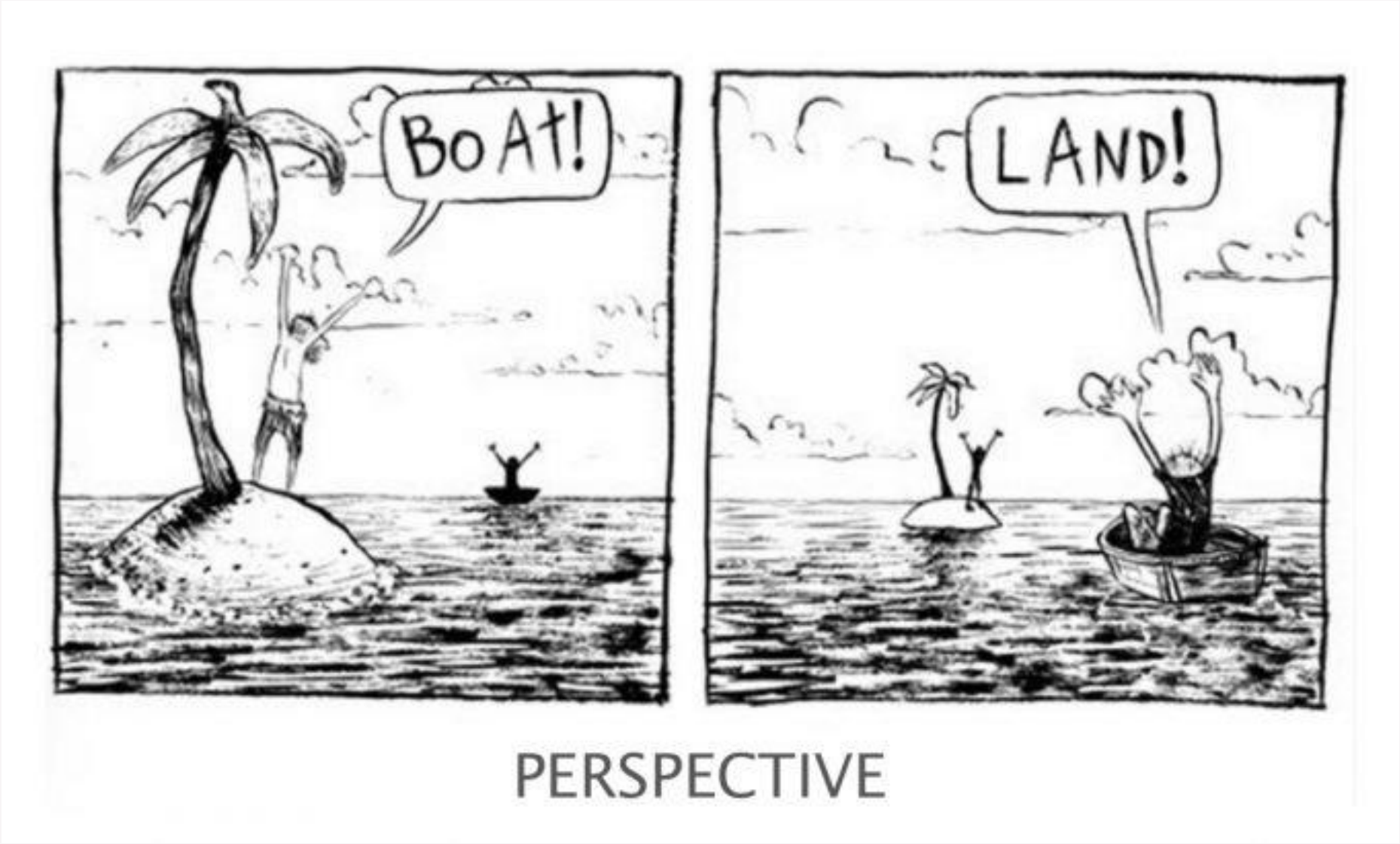
to <u>not</u> feel guilty about their consumption

Australians have…

‘guilt fatigue’

Tired of feeling guilty about the food system

What is a re-frame?



From:

How do we ‘solve the beef sustainability-animal welfare issue?’

To:

How do we allow Australians to stop feeling guilty about buying beef?

Thank you

Level 5, 60 Reservoir Street, Surry Hills NSW
www.pollinate.com.au

Sydney | Canberra | Melbourne | Adelaide