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POLLINATE



Consumer choice and sustainability

November 2021

a

At point of purchase it's all about price and freshness: make it easy to make a good choice.

Price & health

These are the top 2 drivers of choice, consistently across all food buying research.

Freshness and price are hygiene factors when buying food

Top 3 most important when selecting and buying (Wave 12, top 11 - %)

Hygiene	Freshness	36
	Price	36
Motivation	Country where it is produced	26
	Food safety	25
	The animal is well-cared for	23
	No added hormones	20
	Being free range	17
	Nutritional value	16
	Knowing where the animal was farmed or sourced	16
	Naturally raised	15
	No use of antibiotics	15



Price & health

These are the top 2 drivers of choice, consistently across all food buying research.

Coles

Positioned as 'Value'
(low price)

Over ten years of 'down
down' low prices

Woolworths

Positioned as
'health' (fresh)

Over ten years of
'fresh food people'
healthy food.

Success
comes from
making it
quick and
easy to
choose better

People understand 'more stars is better' and the HSR is a quick, easy way to compare products

Responses	Total Sample
NET accurate understanding of the HSR	44% (Apr: 49%)
The more stars the better/healthier	29%
Buy/choose products with more/the most stars	11%
To know what is healthier/better for me	8%
Four stars would be the healthiest/my choice	6%
To choose between similar products	4%
Comparing the number of stars	4%
I'd use it for quick reference	3%
To help make choices over which product to buy	2%
I would compare the number of stars, but also consider price before purchasing	2%
As a general guide	1%
I would have to consider other information + I would have to know more about the system	5%
I wouldn't use it/ rely on it/ would use with scepticism	5%
Don't Know	22%
Other	7%

Open Ended Response: Coded 15
Multiple answers possible

CQ2 How would you use this system? Base: n=1000



As a quick glance option, looking more at the number than the stars.

By checking products against one another to see which has a better rating

Compare products and investigate nutritional content i.e. sugars to see why they are different

I probably wouldn't as I do not know what they are rating against. Is it for sugar content, or is it for proportion of daily intake or level of fat or any number of factors...

more stars the healthy the option, therefore all things being equal you would select the healthier options on 4 star bread and cereal

"Don't know" has significantly declined since April'15, from 31% to 22%

b

Consumer guilt, not
sustainability is the key issue



Cascading health concerns

The product
The production
The process
The promotion

It's all bad!

Australians
have...

'guilt fatigue'

Tired of feeling guilty
about the food
system and seemingly
everything they eat





Australians
just want...

to not feel guilty
about their
consumption



C

What we say and do is different: but
taking a systems approach: its all
joined up... eventually it will shift

Consumers relationship with food is ridden with internal conflict

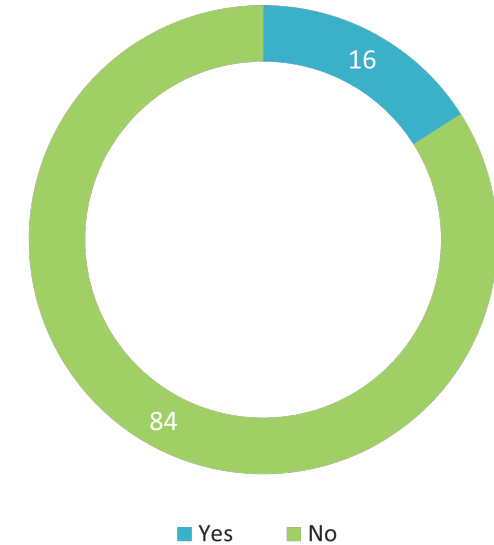


"I love you
but ..."

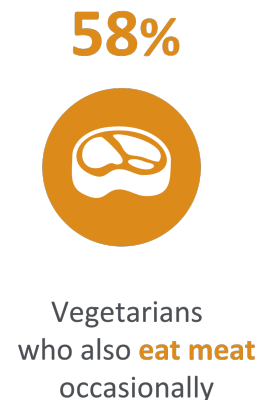
But 'vegetarian' is a flexible term

Many meat eaters
have been
vegetarian and
many vegetarians
still eat meat!

1 in 6 meat eaters
have been vegetarian
in the past



Most claimed
vegetarians still
eat meat
occasionally



But you can't
'educate'
consumers out
of guilt...

The emotional
always tops the
rational





Everyone is making
more sustainable/
ethical choices...

Some just need it to be
easier than others

“I guess I do buy the
sustainable rubbish bags... I
buy free range eggs, I
didn't think I did all
that...but I do”

Australians 'do
sustainability' and
ethical consumption
by making choices...

But currently there
are very few choices
to consume
'sustainably'





This is an incremental
journey: Ethical
choices snowball

“The more [ethical] choices you make, the more you want to make... the more you notice others doing”

“There are a hundred reasons why you go vegetarian, you only need one and the rest stack on top”

Research interview young male, Sydney





Pollinate Pulse

Our COVID hangover

We now must deal with
the impact of our actions ...

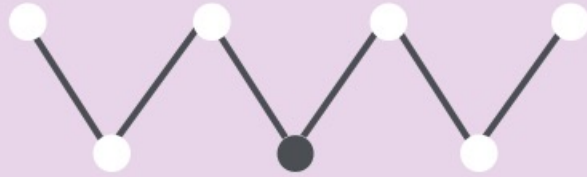
The propping up of some
industries

Withdrawing economic stimulus

Sustainability and climate change

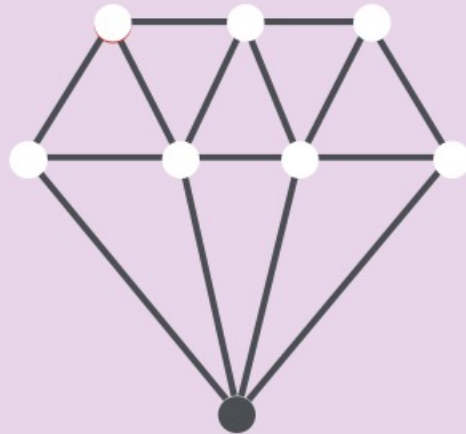
Ignoring other problems as
we dealt with COVID

From linear thinking



to

To a complex, inter-related system



We need to change how we think from a linear, prioritization to a complex, inter-related system. If we think of our challenge as a diamond:

Concerns about the environment are not 'fourth in line' to consumers - they are a fourth facet of a complex interaction of aligned issues and values.

Thank you

Pollinate

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Melbourne: The Commons, 3 Albert Coates Lane, Melbourne VIC

Canberra: Building 3.3, 1 Dairy Road, Fyshwick ACT

www.pollinate.com.au



The role of dietary strategies in reducing environmental impact in Australia

Brad Ridoutt

AGRICULTURE AND FOOD
www.csiro.au



Local solutions are needed

Food systems vary
in different regions

Environmental
challenges differ in
different regions

Food cultures differ

Public health
nutrition challenges
vary

Important sources of
under-consumed
nutrients differ

Intervention
opportunities are
within a local food
system

Australian approach

Environmental data for Australian food

Including agriculture AND food processing (LCA)

Relevant environmental metrics

Planetary boundary framework

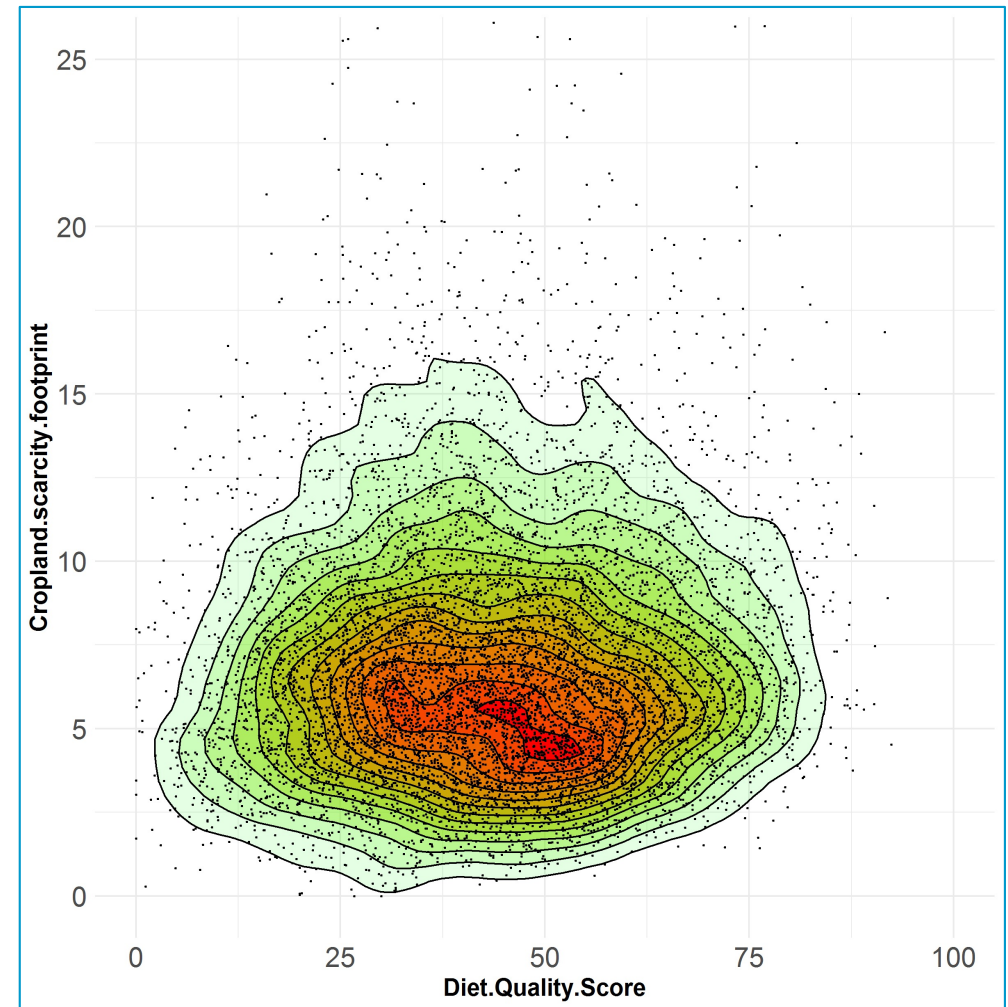
Whole of diet approach – core & discretionary foods

AHS dietary intake data

Through the lens of Australian dietary guidelines

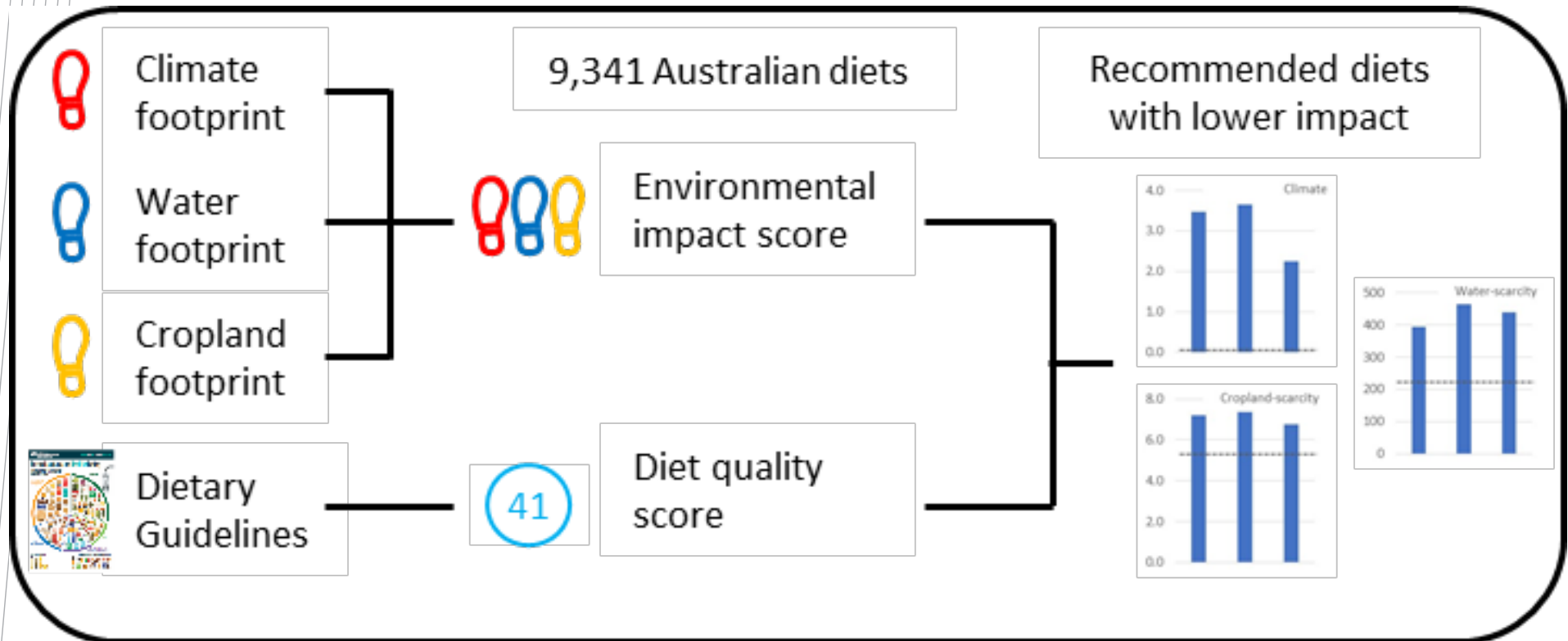
The reality of diets in Australia

- Highly varied
- Weak correlations between environmental footprints at the level of individual diets
- Individual foods score highly on some footprints and very low on others, and vice versa
- Little or no correlation between diet quality and environmental footprint



This suggests it will be a challenge to achieve multiple objectives concurrently

The Australian evidence



Weighting model based on “distance-to-target” to downscaled planetary boundaries

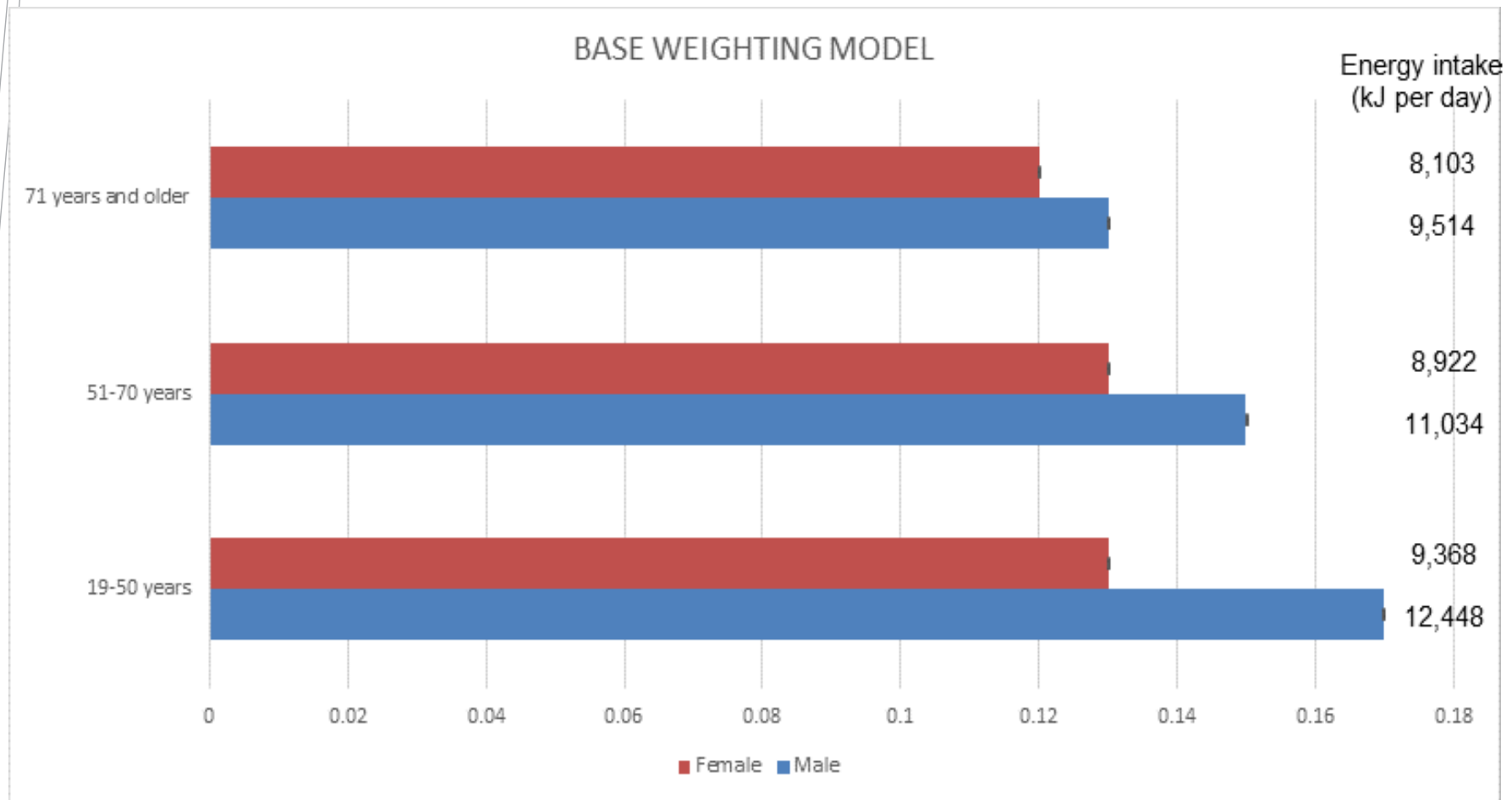
Footprint	Current value	Target	Reduction	Weight
Climate	3.4 kg CO2 e/person/day	0	100%	0.585
Water scarcity	433 L-e/person/day	217 L-e/person/day*	50.1%	0.294
Cropland	7.1 m2.yr-e/person/day	5.6 m2.yr-e/person/day	20.7%	0.121

Other weighting models were developed for sensitivity analysis

Footprint	Base	ALT1	ALT2	ALT3
Climate	0.585	0.513	0.828	0.333
Water scarcity	0.294	0.401	0.000	0.333
Cropland	0.121	0.086	0.172	0.333

Applying the EI score to 9,341 adult diets

Average all adults 0.143



Total energy intake explained almost half the variation in EI score

Discretionary foods: 29%

Higher impacts with recommended diet based on current food choices

Food	Current diet		Recommended diet based on current food choices	
	Servings	El score	Servings	El score
Fruit	1.38	0.010	2.0	0.014
Vegetables	2.47	0.007	5.5	0.017
Bread and cereal foods	4.57	0.014	6.0	0.019
Fresh meats and alternatives	2.32	0.035	2.8	0.042
<i>Fish and seafood</i>	0.22	0.003	0.27	0.003
<i>Red meat</i>	0.66	0.019	0.79	0.023
<i>Poultry</i>	0.74	0.008	0.90	0.010
<i>Pork</i>	0.18	0.002	0.22	0.002
<i>Vegetarian alternatives</i>	0.51	0.003	0.61	0.003
Dairy foods and alternatives	1.46	0.017	2.5	0.029
Discretionary foods	7.42	0.044	2.8	0.017
Other		0.021		0.021
Total		0.148		0.158



**6.6%
higher**

15% lower impacts with recommended diet based on “best quadrant” food choices

Food	Current diet		Recommended diet based on current food choices		Recommended diet based on HQLI food choices	
	Servings	El score	Servings	El score	Servings	El score
Fruit	1.38	0.010	2.0	0.014	2.0	0.011
Vegetables	2.47	0.007	5.5	0.017	5.5	0.014
Bread and cereal foods	4.57	0.014	6.0	0.019	6.0	0.015
Fresh meats and alternatives	2.32	0.035	2.8	0.042	2.8	0.022
<i>Fish and seafood</i>	0.22	0.003	0.27	0.003	0.31	0.003
<i>Red meat</i>	0.66	0.019	0.79	0.023	0.50	0.001
<i>Poultry</i>	0.74	0.008	0.90	0.010	0.98	0.011
<i>Pork</i>	0.18	0.002	0.22	0.002	0.22	0.002
<i>Vegetarian alternatives</i>	0.51	0.003	0.61	0.003	0.79	0.004
Dairy foods and alternatives	1.46	0.017	2.5	0.029	2.5	0.028
Discretionary foods	7.42	0.044	2.8	0.017	2.8	0.014
Other		0.021		0.021		0.020
Total		0.148		0.158		0.125

Key findings

1. No planetary boundary goals were met
2. Difficult to achieve multiple objectives simultaneously
3. Trade-offs are a challenge:
 - 35% progress toward the climate goal
 - 28% progress towards the cropland goal
 - Water footprint goal about 26% in wrong direction
4. Larger reductions in climate footprint resulted in greater trade-off with water

Two clear strategies emerge: 1) avoiding food waste, and 2) avoiding overconsumption

Why so many conflicting recommendations?

- Single environmental aspect considered
- Conceptual dietary comparisons
- Dietary recommendations that are not nutritionally complete
- Footprints based on agricultural production only

Yet the evidence underpinning many widely touted recommendations about what to grow and eat is remarkably sparse and generally biased.

Putting all foods on the same table: Achieving sustainable food systems requires full accounting

Benjamin S. Halpern^{a,b,1}, Richard S. Cottrell^{c,d}, Julia L. Blanchard^{c,d}, Lex Bouwman^{e,f,g}, Halley E. Froehlich^{a,h,i}, Jessica A. Gephart^h, Nis Sand Jacobsenⁱ, Caitlin D. Kuempel^g, Peter B. McIntyre^m, Marc Metian^o, Daniel D. Moran^o, Kirsty L. Nash^{c,d}, Johannes Többen^o, and David R. Williams^{b,p}

18152–18156 | PNAS | September 10, 2019 | vol. 116 | no. 37

Production system strategies will be needed to do the heavy lifting

Victorian milk	0.7 to 262 L-eq per L
Fresh tomato	5.0 to 52.8 L-eq per kg

Variation in footprints between the same products can be huge

The innovation potential in food production is enormous

Lower footprint diets ultimately depend on lower footprint food production

In conclusion

***Avoid
food
waste***

***Promote
consumption
in line with
ADGs and
personal
needs***

***Improve
practices &
technology
in food
production***



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