



Australia's palate shift: how global influences are changing the way we eat

Bernard Salt AM

18th Australian Almond Conference

Pullman Hotel Melbourne, Albert Park, Victoria

October 30th - November 1st, 2018



SUPPORTED BY:
Horticulture Innovation Australia Ltd



HOSTED BY:
The Almond Board of Australia



Australia is a good place to be right now... and over the coming decade



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2018		GDP USDbn
1.	United States	20,413
2.	China	14,093
3.	Japan	5,167
4.	Germany	4,212
5.	United Kingdom	2,936
6.	France	2,925
7.	India	2,848
8.	Italy	2,182
9.	Brazil	2,139
10.	Canada	1,799
11.	Russian Fed.	1,720
12.	South Korea	1,693
13.	Spain	1,506
14.	Australia	1,500
15.	Mexico	1,213

2028		GDP USDbn
1.	United States	27,603
2.	China	26,110
3.	Japan	6,348
4.	India	6,194
5.	Germany	5,538
6.	France	4,044
7.	United Kingdom	3,958
8.	Brazil	3,093
9.	Italy	2,848
10.	Canada	2,698
11.	South Korea	2,443
12.	Australia	2,291
13.	Russian Fed.	2,262
14.	Spain	2,068
15.	Indonesia	1,997

The Australian palate is changing



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		2016	Change 2011-2016
	United Kingdom	1,088,000	-1%
	New Zealand	518,000	+7%
	China	510,000	+60%
	India	455,000	+54%
	Philippines	232,000	+36%
	Vietnam	219,000	+19%
	Italy	174,000	-6%
	South Africa	162,000	+12%
	Malaysia	138,000	+19%
	Sri Lanka	110,000	+27%
	Germany	103,000	-5%
	South Korea	99,000	+33%

Nationalities by country of birth in Australia between the 2011 and 2016 censuses

Source: Based on Australian Bureau of Statistics data; The Demographics Group

New acronyms for our newest tribes



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PUMCINS ...

Professional **U**rban **M**iddle **C**lass **I**n **N**ice **S**uburbs

Not **E**nough **T**ime **T**o **E**njoy **L**ife

...NETTELS

KIPPERS ...

Kids **I**n **P**arents **P**ockets **E**roding **R**etirement **S**avings

Lots **O**f **M**oney **B**ut **A** **R**eal **D**ickhead

...LOMBARDS

Our tastes have changed over time to include “new” foods



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ANGLO



MEDITERRANEAN



ASIAN



ARAB/PERSIAN

There has been a loss of faith in big institutions... the market wants authentic relationships



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		2016	Change 2011-2016
1.	No religion	6,933,700	+45%
2.	Catholic	5,291,800	-3%
3.	Anglican	3,101,200	-16%
4.	Uniting Church	870,200	-18%
5.	Islam	604,200	+27%
6.	Buddhism	563,700	+7%
7.	Presbyterian & Reformed	526,700	-12%
8.	Eastern Orthodox	502,800	-11%
9.	Hinduism	440,300	+60%
10.	Baptist	345,100	-2%
11.	Pentecostal	260,600	+9%
12.	Lutheran	174,000	-31%

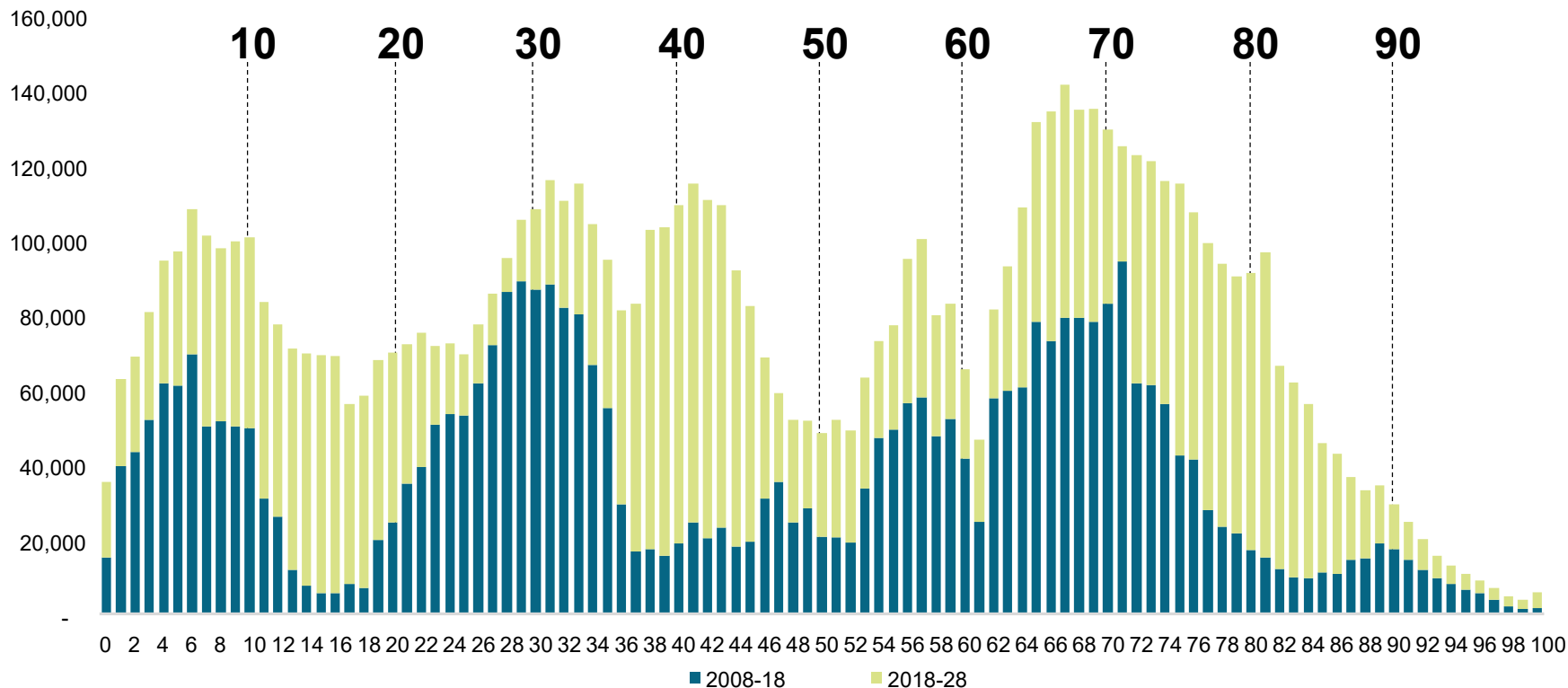
Religious affiliation in Australia between the 2011 and 2016 censuses

Source: Based on Australian Bureau of Statistics data; The Demographics Group

More people in every age group... but especially retirees



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Australian population by single year of age 2008-2018 and 2018-2028

Source: Based on Australian Bureau of Statistics data; The Demographics Group

Big social shift from families to couples to singles... smaller packs



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	Number of Households (000)			H/H Growth
	1986	2016	2036	1986-2036
Traditional Nuclear Family	2,272	2,687	3,424	+51%
Couple-Only	1,236	2,199	3,093	+150%
Single Household	961	2,024	2,721	+183%
One Parent Families	215	355	477	+122%
Group Household	499	919	1,275	+156%
Total No.	5.2m	8.2m	11.0m	+112%

Change in household and family type in Australia over 50 years

Source: Based on Australian Bureau of Statistics data; The Demographics Group

Australia's biggest job centres are getting bigger



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	Place of work	2016	Change 2016-2011
1.	Sydney	321,000	69,400
2.	Melbourne	221,000	35,000
3.	Perth City	137,000	3,100
4.	Brisbane City	122,000	6,300
5.	Adelaide	108,000	7,400
6.	Dandenong	66,000	12,000
7.	Docklands	56,000	23,900
8.	Parramatta	50,000	7,000
9.	North Sydney	49,000	5,900
10.	Macquarie Park	49,000	9,900

	Place of work	2016	Change 2016-2011
11.	Southbank	39,000	5,500
12.	Hobart	38,000	3,200
13.	Richmond	37,000	6,900
14.	Pymont - Ultimo	37,000	7,200
15.	Civic Canberra	34,000	2,600
16.	Clayton	33,000	4,500
17.	Geelong	31,000	5,600
18.	Surry Hills	30,000	6,500
19.	St Leonards	30,000	3,800
20.	Parkville	29,000	6,900

Top 20 job centres in Australia at 2016 plus net growth in jobs from 2011

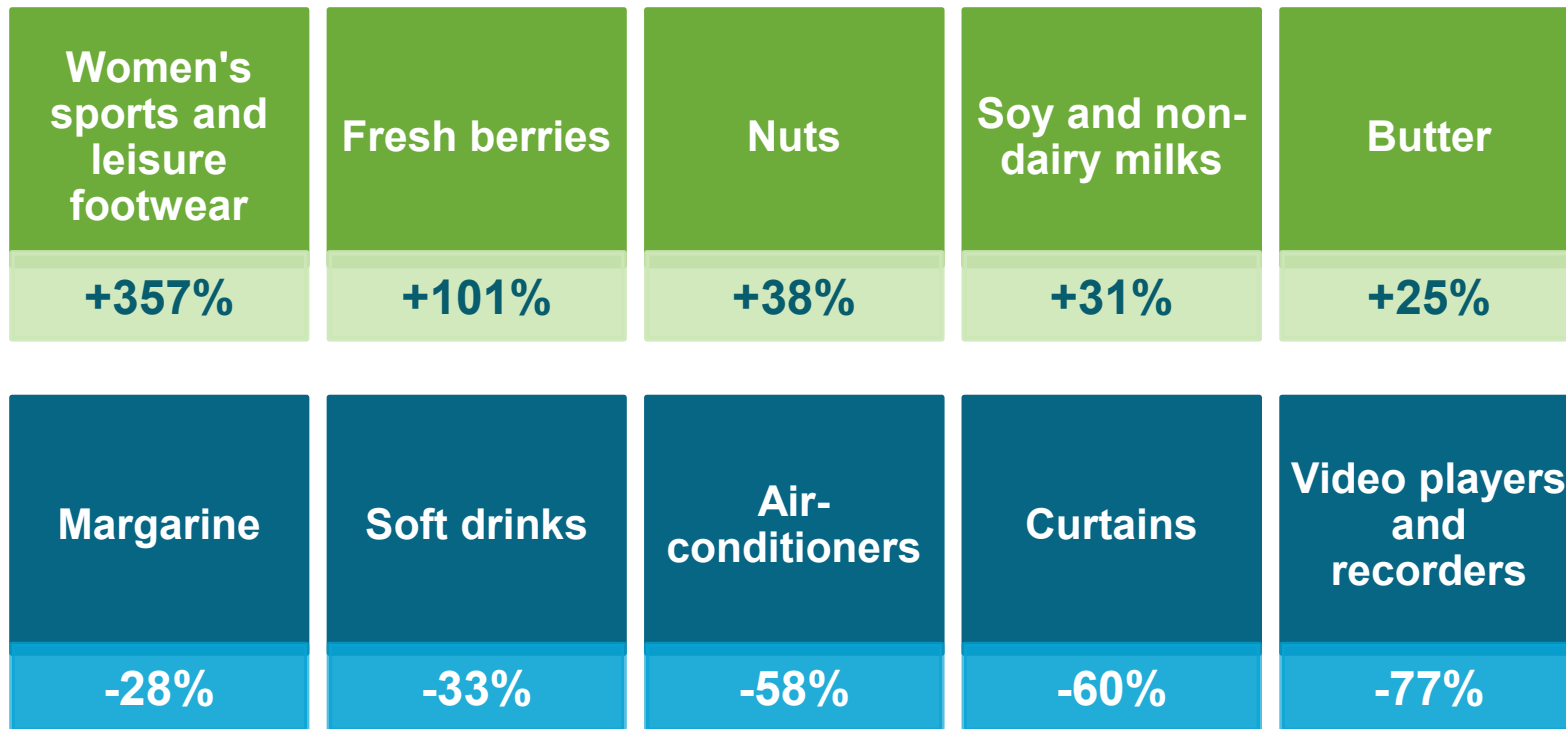
Source: Based on Australian Bureau of Statistics data; The Demographics Group

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- **Household Expenditure Survey — the Australian Bureau of Statistics**
 - **New report compares “wallet spending” 2010 with 2016**
 - **Wallet spending up 15% over six years**
 - **Survey of 10,000 households using detailed diaries**
 - **Dataset covers 800 spending items, eg food, petrol, mortgage**

The household wallet is shifting in favour of lifestyle and wellness



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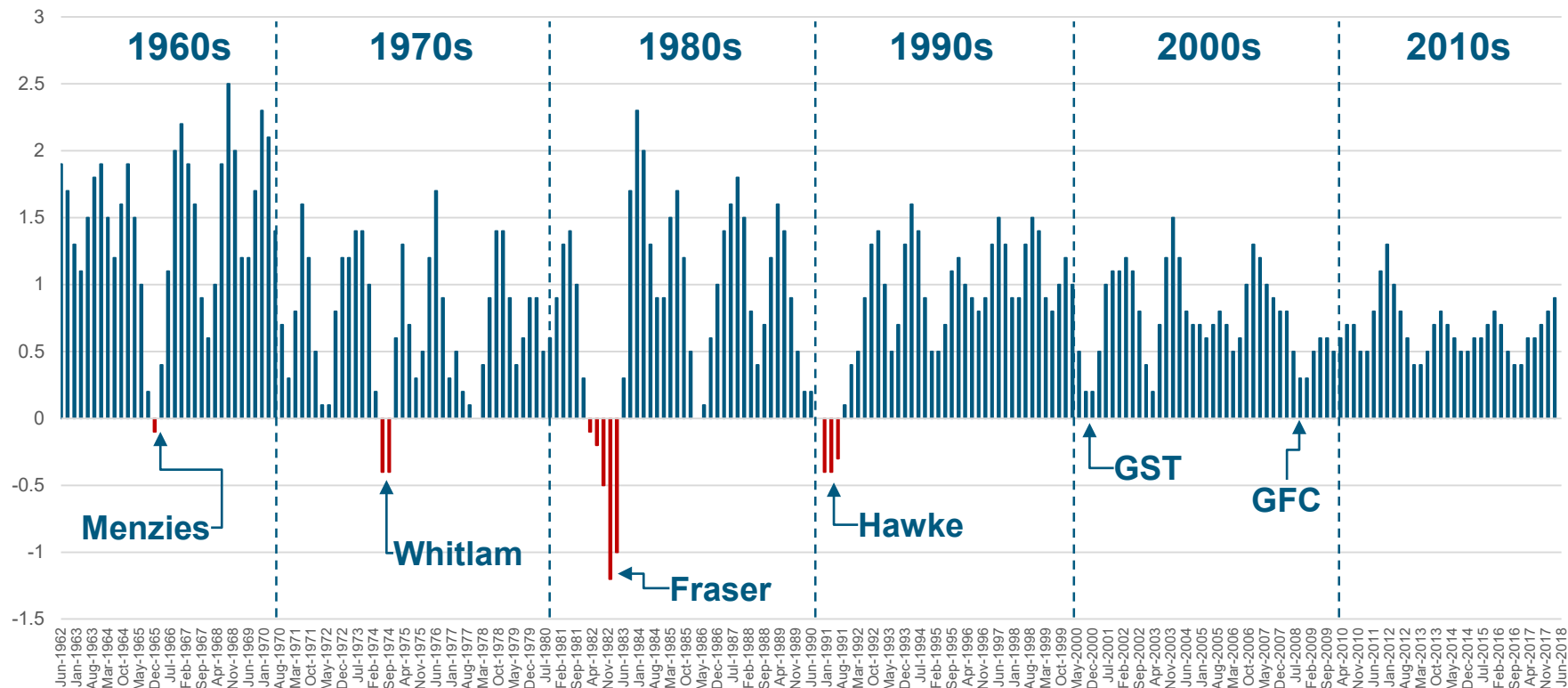
Total Goods & Services Expenditure: 15%

Source: Based on Australian Bureau of Statistics data; The Demographics Group

Years of prosperity have created a culture of aspiration



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Per cent change in Australian GDP by quarter from June 1962 to June 2018

The way we live has changed ... and so too have expectations



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1950s



Today

If you are under 40 and starting to read this, I politely suggest that you turn the page. There isn't anything here that will interest you. Just me rabbiting on about the old days. Bit of a yawn-fest, really... Have they gone? Is it just you and me now? Shhh... act natural and read this column without making a sound. Do not look up; do not make eye contact with anyone. Come close to the page. Closer!

I belong to a secret society and I am looking for new recruits. It's a sect known as the Middle-Aged Moralisers. We in the MAM meet monthly in our members' homes in the suburbs, where we discuss... hush... the youth of today. Why the need for secrecy? Well, if it ever got out that middle-aged people talk about young people, all hell would break loose.

We on the MAM membership committee have been watching you. We've seen the pursed lips, the tut-tutting, the head-shaking. We have seen the sighing, the face-palming, the eye-rolling. We think you are one of us. We know it, you know it. Come to our next meeting. You'll find it liberating to know there are others just like you.

This week we're discussing the evils of hipster cafes. Do you know why hipster cafes have milk crates for seating? To keep baby boomers at bay. They know they can't officially ban us, so what do they do? They rig the seating so that tight baby-boomer hamstrings recoil at the prospect of positioning the buttocks below the latitude of the knees. Sitting is fine. Getting up is problematic. And doesn't the sub-40 set



BY BERNARD SALT

Moralisers, we need you!

know it. They don't want we over-50s despoiling the authentic grooviness of their cafes. (Is groovy still a word?)

Do you know what else hipster cafes do? With malicious aforethought, hipster proprietors deliberately design their menus with the tiniest of writing and print these same menus using a light-coloured ink on light-coloured paper. That is pure evil writ large. And then these same hipster

proprietors play thumping, pumping music that reverberates off polished concrete floors so as to eliminate all hope of audible conversation. The meandering middle-aged who have naively wandered into hipster cafes are thereby reduced to pathetically lip-reading conversations, hoping to catch the odd word so as to guess the meaning of entire sentences.

Don't get me started on the befuddlement caused by toilets with obscure signage. Is that an M or is that a W? Is that a top hat or is that a ladies' bonnet? This is a hipster cafe: they wouldn't have a top hat on the door to the men's loo. Unless, of course, they're being *ironic*. Maybe it is the men's. Why can't we have some light back here? Why can't we have a sign saying men and women?

But all of this is mere ephemera. It gets worse. I have seen young people order smashed avocado with crumbled feta on five-grain toasted bread at \$22 a pop and more. I can afford to eat this for lunch because I am middle-aged and have raised my family. But how can young people afford to eat like this? Shouldn't they be economising by eating at home? How often are they eating out? Twenty-two dollars several times a week could go towards a deposit on a house.

There. I've said it. I have said what every secret middle-aged moraliser has thought but has never had the courage to verbalise. Should you disclose the contents of this conversation, I will disavow all knowledge of you and of the existence of this secret society. In fact, this conversation never took place. Goodbye.



I stopped eating smashed avocado ... and now I own a castle



B220

SUNRAYSIA HWY

SMASHED
Avocado \$13

Ballarat 83

Melbourne 191

vicroads

Points to consider



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1

Australia will remain a place of growth and opportunity over the coming decade... more spending and greater **prosperity** will find its way into our eating habits

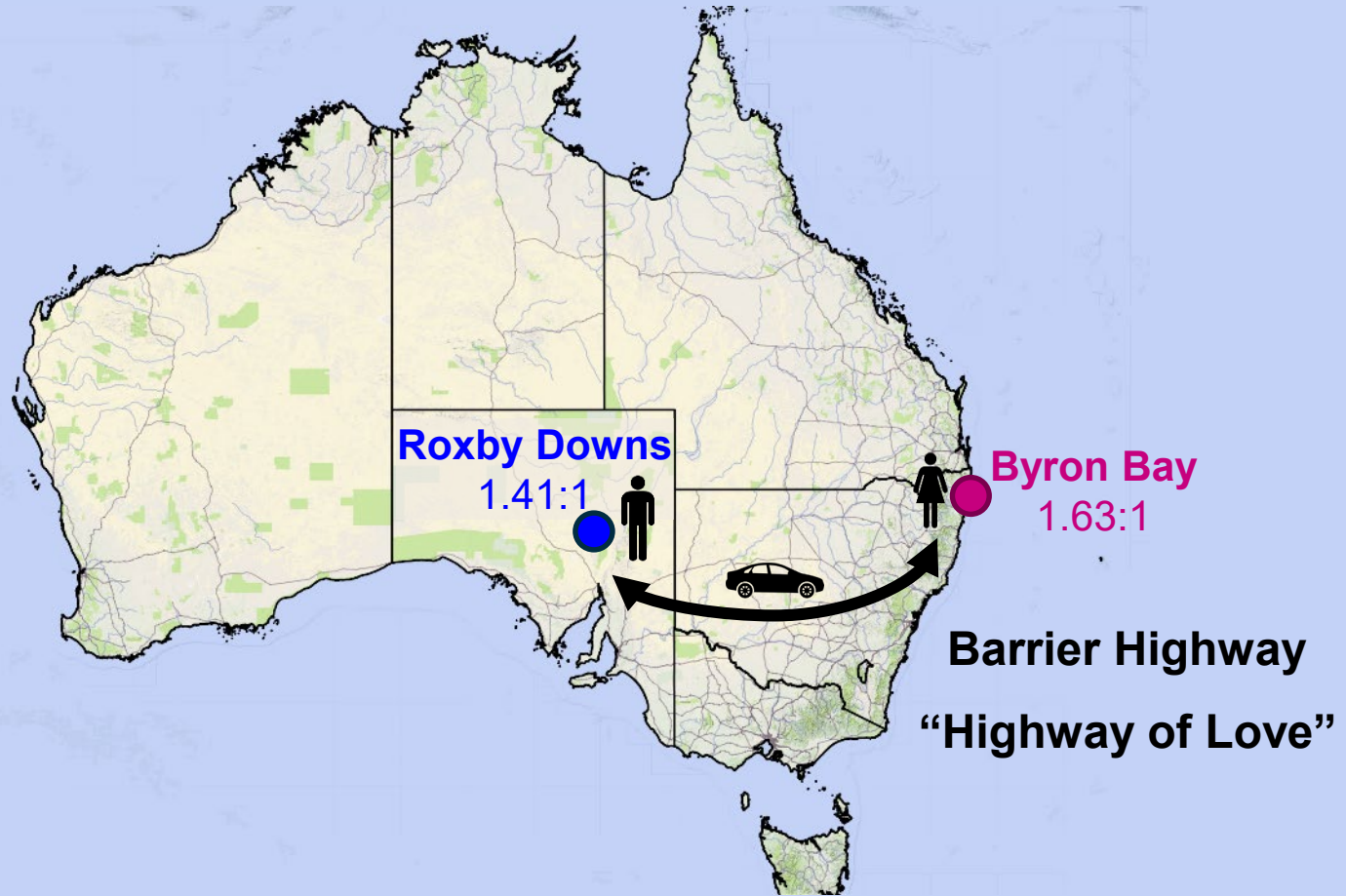
2

The social structure of the nation is changing... we're shifting from an Anglo base to a Mediterranean-Asian fusion culture... more likely to live in childless households... more **discretionary** spending

3

The population is ageing in three waves... more teenagers... more 30-somethings... more 60-somethings... which means targeted marketing for **almonds** and indeed for anyone seeking to maximise market connection

Introducing Australia's bachelor hotspot ...



Hotspot suburbs for single men and women aged
25-34 at the 2016 Census



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