

BARE.

**Australian
Funeral Industry
State of the
Nation 2021**

**A NATIONALLY REPRESENTATIVE REPORT
ON END-OF-LIFE AND FUNERAL PLANNING.**



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INTRODUCTION

Message from our co-founders

Consumer preferences are changing. With the rise of e-commerce, our expectation as customers has evolved from brick-and-mortar retail stores, limited product choices and (at times) helpful salespeople, to online purchasing, complete customisation and real-time price transparency.

Unfortunately, the funeral industry hasn't kept pace with these changing consumer trends.

There are a number of reasons why the industry hasn't evolved, however rather than focusing on the "why", we chose to focus on the "what". What are people's expectations of funeral arrangements? What have they experienced as part of arranging a funeral. And ultimately, what needs improvement to make sure funeral planning and arrangement is exactly what they need, when they need it most?

We believe that answering these questions and shedding light on what people want will have a profound impact on generations to come. In Australia alone, over 160,000 people die annually, with their deaths materially impacting family, friends and the greater community they leave behind.

To figure out the "what", we undertook the most comprehensive end-of-life survey in Australia. We've independently surveyed thousands of Australians, with our work culminating in this report - a State of the Nation for the Australian Funeral Industry, 2021.

What needs improvement to make sure funeral planning and arrangement is exactly what they need, when they need it most?

This report aims to generate more investigation into how Australians experience death, funeral arrangement and end-of-life planning more broadly. We hope that it can be used as an ongoing resource in evolving funeralcare in Australia, as well as normalising the conversation around death.



Sam McConkey & Cale Donovan
Bare co-founders

BARE.

PURPOSE AND METHODOLOGY

This research was commissioned by Bare to understand the values, expectations, and experiences that Australians have around the funeral industry and end-of-life planning.

This report comprises the results of Bare's three funeral insights studies: Funeral Beliefs and Values Study, with 1026 respondents; the Funerals Experience Study, with 1468 respondents; and the Funeral Opinions and Industry Study with 1000 respondents. These were conducted between July and November, 2021.

Designed in collaboration with independent external advisors and subject matter experts including a detailed Q&A review, the surveys were distributed by PureProfile.

The surveys were double-blinded, with respondent pools comprised of the Australian population aged 35 and over. The total sample size results in a maximum margin of error of +/-1.5% at the 95% confidence level, with margins of error for separate states and territories being slightly higher. This research seeks to help us improve the process for older Australians and their families.

If you would like to comment on the content of this report, please contact us at funeralreport2021@bare.com.au

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INTRODUCTION

Foreword

Twenty-first century Australia is home to unique cultures of death and dying. Whether that be our high rates of cremation, our relatively relaxed vision for the funeral ceremony, or our serious concern for good food and drink at the reception, 'death Down Under' constitutes a distinct set of attitudes and practices.

For a long time, however, we have lacked an empirical understanding of these phenomena, simply because we have failed to undertake the required research. In the realm of academia, scholarship on death and dying has unfortunately been dominated by studies of the UK and US. It has been focused on the end-of-life or on grief, rather than all those important stages in between.

Fundamentally, we still don't understand the character and diversity of Australian death well. This oversight is troubling for many reasons. As much as life, our approach to death and dying reflects who we are as a society, as well as who we want to be. And without good quality data, it is hard to enact change; we need evidence-based approaches in order to build better deathcare services.

This report makes a significant contribution to a growing body of research into Australian death cultures. Delving into beliefs about funerals, body disposition, and grief, it suggests that Australians increasingly want more bespoke, personal services, and above all, desire honesty and authenticity from their deathcare providers.

The report also highlights several gaps that persist in public understanding of what is possible or necessary at the end of life. Luckily, it also provides good evidence of a real (and perhaps surprising) desire among the community to speak openly about death. These conversations are the starting point of developing services that better align with what people want, not just what they presume is possible or 'correct'.

If the challenges of the last few years have taught us nothing else, it is the value of rigorous research that is accessible to all. I hope that work like this becomes the basis of future collaborations between academia, industry, and community groups, so that we can collectively build better futures of deathcare.

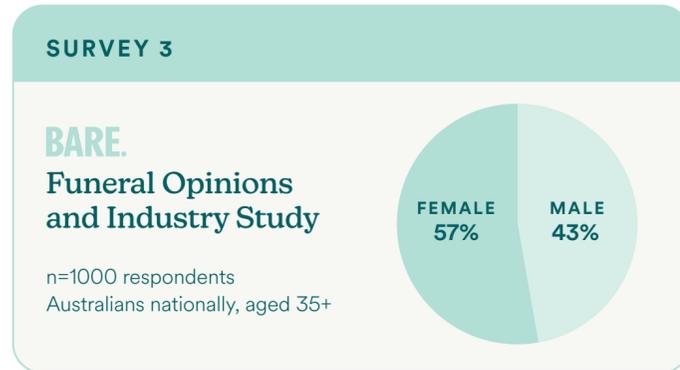
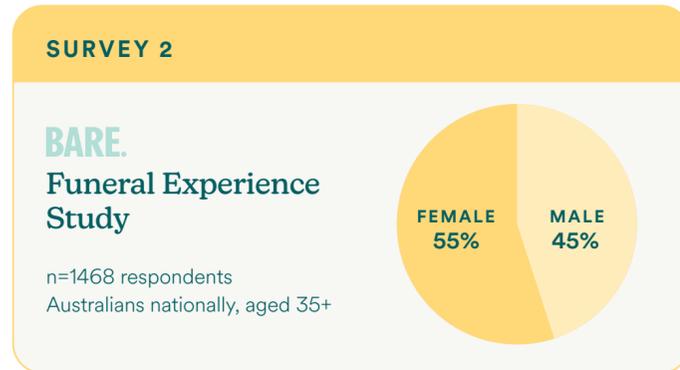
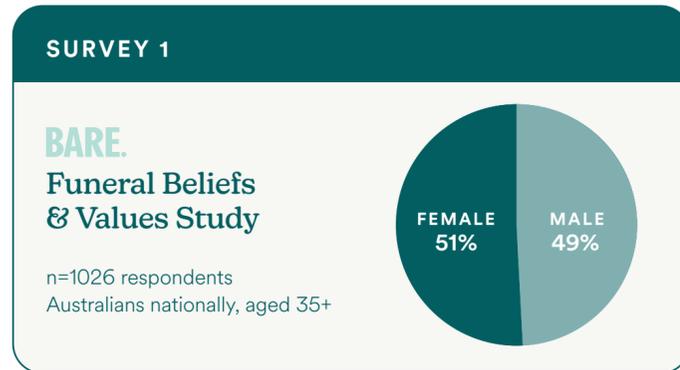


Dr Hannah Gould
Cultural Anthropologist
& Death Studies Scholar
University of Melbourne



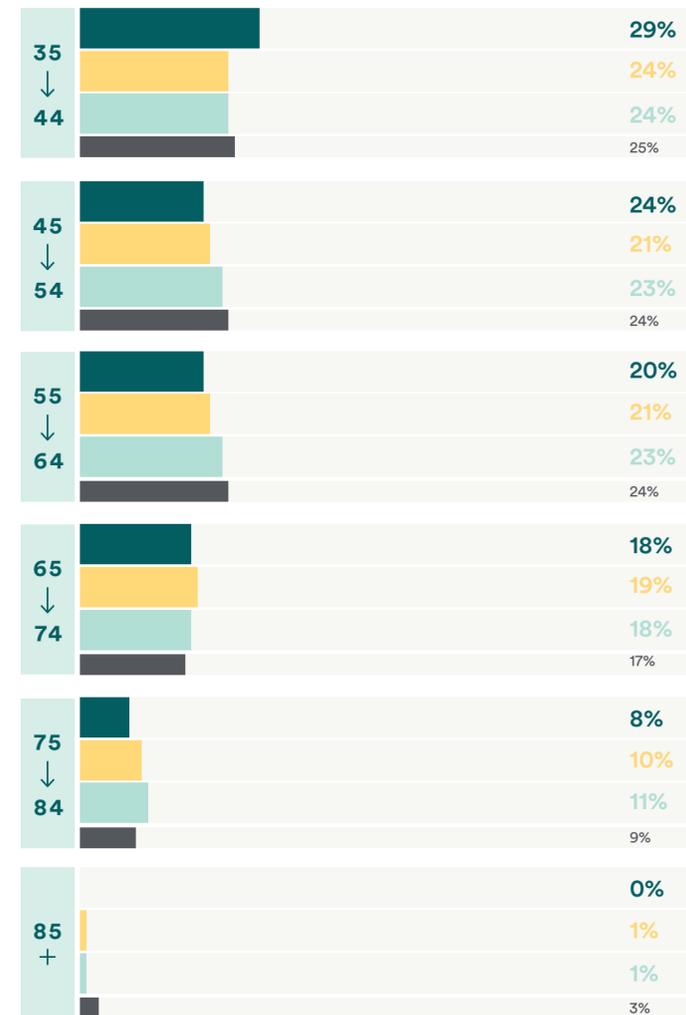
WHO WE ARE

This report comprises the results of Bare's three funeral insights studies: Funeral Beliefs and Values Study, with 1026 respondents; the Funerals Experience Study, with 1468 respondents; and the Funeral Opinions and Industry Study with 1000 respondents. These were conducted between July and November, 2021



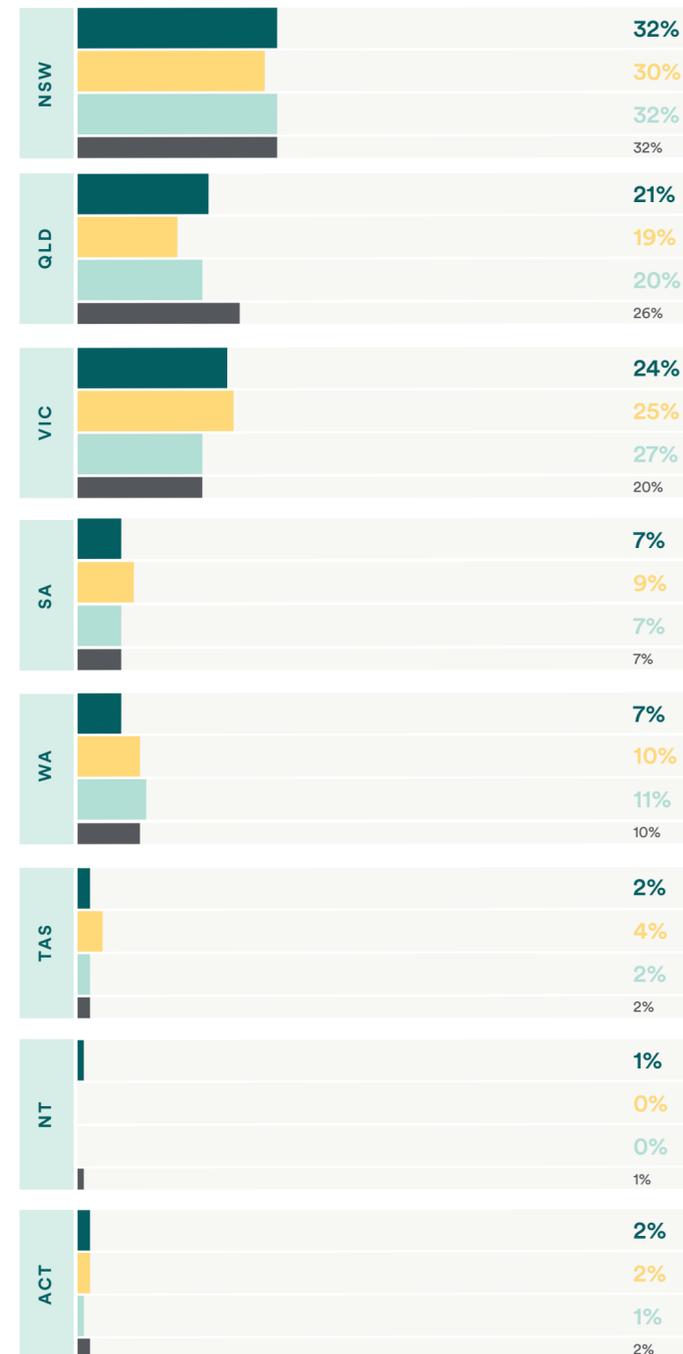
RESPONDENTS BY AGE

Compared with Australian Bureau of Statistics (ABS) population age percentage, 2021 data:



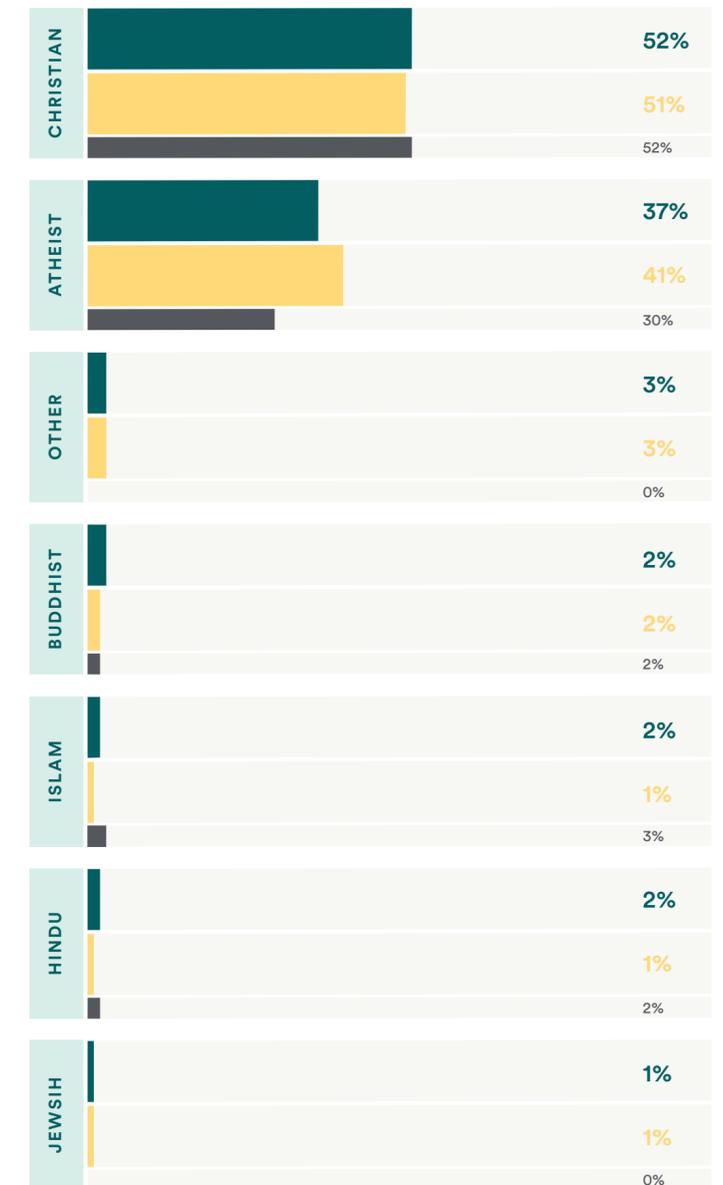
RESPONDENTS BY LOCATION

Compared with Australian Bureau of Statistics (ABS) population age percentage, 2021 data:



RESPONDENTS BY RELIGION

Compared with Australian Bureau of Statistics (ABS) population age percentage, 2021 data:



NOTE: Percentages may not add up to 100% as values are rounded to the nearest percent. Religion data was not available for Survey 3.

WHO WE ARE

Death affects almost all Australians over the age of 35, with 95% of all respondents having attended a funeral, and 60% being involved in a funeral arrangement in their life.

EXTENT OF FUNERAL PLANNING

Funerals are ever-present in Australian society. Almost a quarter of Australians (24%) have been involved in making funeral arrangements in the past 5 years. Over this same timeframe, most people (75%) have attended at least one funeral, while almost half (48%) have attended more than one.

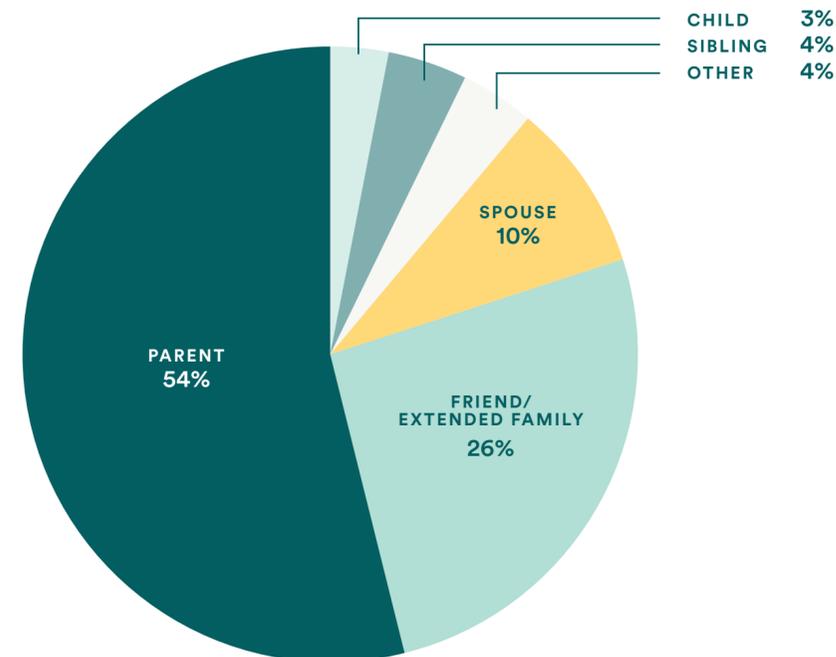
That number is expected to grow, as the estimated 4.2 million older Australians (aged 65 and over) grows from 16% (ABS 2020) of our total population to between 21% and 23% (ABS 2018) by 2066.

Over 10m

Australians over the age of 35 have attended a funeral in the past 5 years.

WHO THE FUNERAL WAS FOR

More than half (54%) of those who have planned a loved one's funeral have done so for a parent. A quarter (26%) were arrangements for an extended family member or friend [n= 895].



CONSUMER COMMENTARY ON FUNERAL PLANNING



“ I was in too much shock to really know what I was agreeing to or what I planned...”



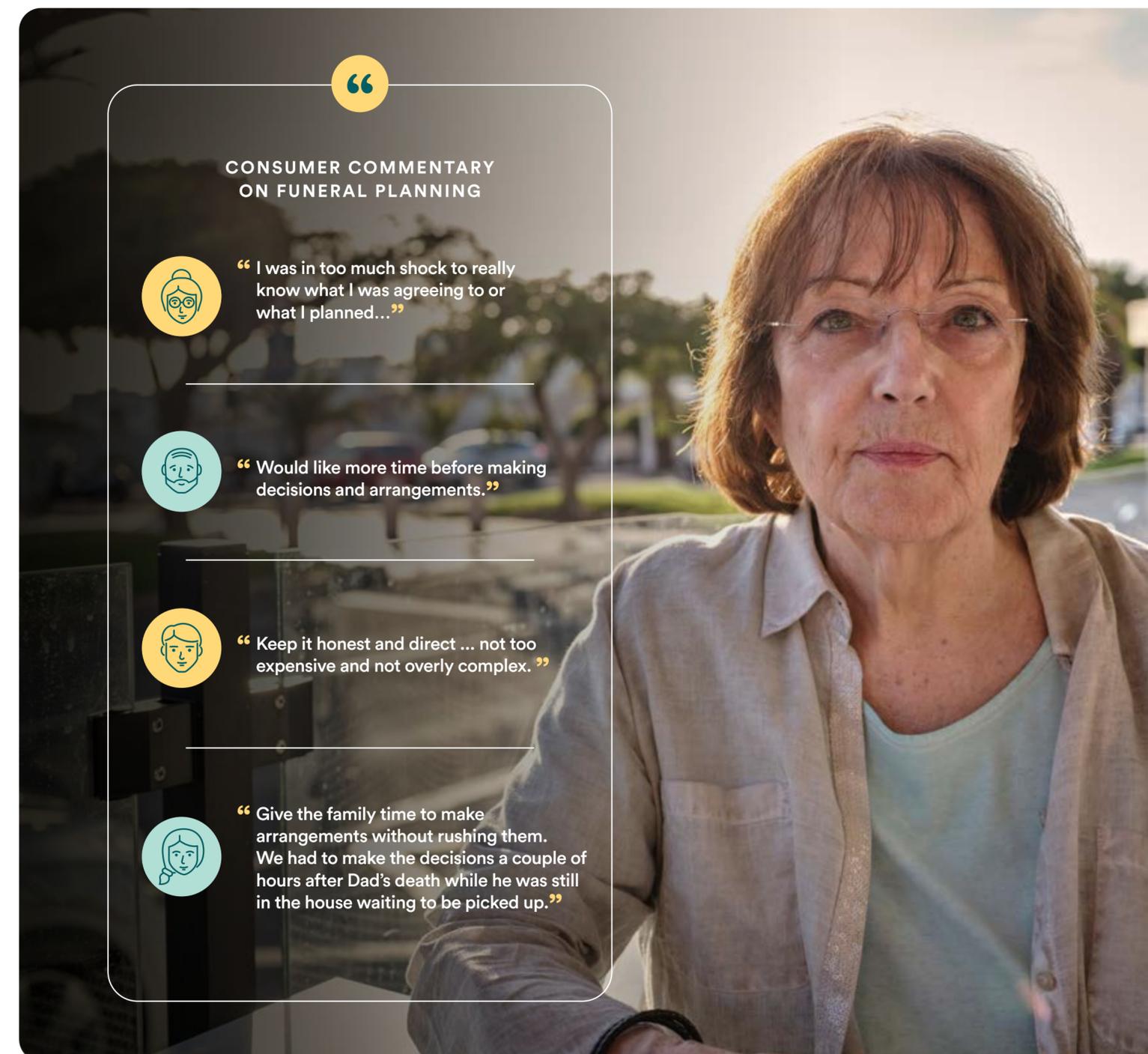
“ Would like more time before making decisions and arrangements.”



“ Keep it honest and direct ... not too expensive and not overly complex.”



“ Give the family time to make arrangements without rushing them. We had to make the decisions a couple of hours after Dad's death while he was still in the house waiting to be picked up.”



WHO WE ARE

Australians know their preference on either cremation or burial. However we rarely go into more detail for our end-of-life plans.



“

CONSUMER COMMENTARY ON FUNERAL PLANNING

“ Talk to the person before they pass, ensuring you understand their wishes for the funeral and taking down their life history for the eulogy.”

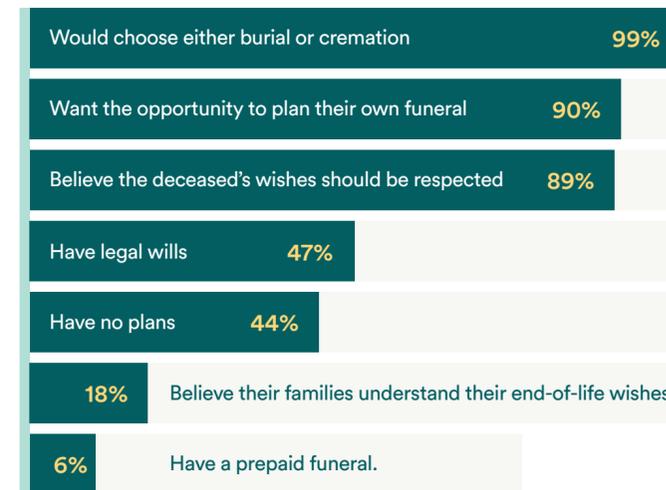
“ I would like to organise everything so my family could grieve without the stress.”

“ People should be more open about death and not leave it to the last minute.”

BEST LAID PLANS

The vast majority (90%) agreed that people should have the chance to plan their own funeral before they die, and that these wishes should be honoured, even if it's not what the family want.

The Melbourne University's DeathTech Research Team report (2020) found that respondents valued the importance of respecting the deceased's 'documented last wishes' as the dominant consideration when making decisions about the disposal of a loved one's body. However, most Australians only discuss method of disposal, for example cremation or burial.



Almost all respondents know their preferred method of disposal, however the articulation of their planning significantly reduces when it comes to documenting or arranging it in advance. Close to half of respondents (44%) referenced having no plans at all, with only 18% believing their families know exactly what they want. Even fewer again (6%) have prepaid in advance.

This gap in information leads to increased stress in funeral arrangements. In fact, 44% of respondents in Bare's Funeral Opinions and Industry Study [n=638] experienced family tension while organising a funeral, which might have been avoided by planning ahead.

Whatever an individual chooses, Australians are generally accepting and respectful of their wishes. Three quarters (77%) of Bare's Funeral Beliefs and Values Study [n= 1026] believe it is acceptable for an individual or family to choose not to host a funeral service or memorial at all, even though only 89% think it's valuable to have a service or memorial of some description.

UNAFFECTED BY RELIGION

Whilst 47% of Australians identify with a religious faith, making funeral arrangements today was not largely led by religion. Of religious respondents, only 10% strongly agree that religion or spirituality would impact the choices they make regarding funeral planning and memorial services.

Most respondents in Bare's Funeral Beliefs and Values Study agreed that funeral ceremonies of some form are important, but not necessary. This is consistent with van der Lann and Moerman's (2017) study, which noted a general decline in religious faith as being responsible for secularised memorialisation.

The report noted that, increasingly, Australians are including the deceased's personal items in the ceremony, such as memorabilia or other treasured objects. The cultural shift away from religion has also replaced the standard liturgy with public testimonies or 'tributes'.

Just 9% said their religion had specific requirements regarding what should happen to the deceased's body, for example a burial, and in some instances burial must occur within hours after death. The DeathTech Research Team (2020) study found Catholics were the prominent group that generally preferred conventional burial to cremation.

Catholic respondents, in comparison to other religions, appeared to have the highest preference for tradition and religion to be part of their funeral service. However, there has been a global shift in public attitudes towards cremation in recent years.

Some catholic-dominant nations like Greece and Malta, where the method of disposition was forbidden due to religious observances, have recently begun allowing cremation, largely due to public demand and the lack of land availability.

WHO WE ARE

Every Australian grieves differently. We primarily rely on family and friend networks for support, but we have a reluctance to seek out professional resources, even if freely available.

COPING WITH GRIEF

Almost every respondent (94%) of Bare's Funeral Experiences Study believes individuals should be allowed to grieve in their own way after a loved one dies. However, Australians overwhelmingly believe grief is different for each individual. They generally look for more support from social networks, as well as funeral directors.

Sadly, almost a third of respondents (30%) in Bare's Funeral Opinions and Industry Study [n= 1000] admitted they have avoided friends who have lost someone because it's either too uncomfortable or they didn't know what to say. Interestingly, 43% agreed that death and grief education should be taught in schools.

It is noteworthy that more than two-thirds of respondents (69%) from Bare's Funeral Experiences Study believe professional assistance, such as counselling, can be beneficial in managing grief. This number is even greater than the 54% who value funerals as important for family and friends to cope with their grief. More than half of respondents in Bare's Funeral Experiences Study (58%) valued a funeral provider's ability to provide advice or support on grief management as an important attribute.

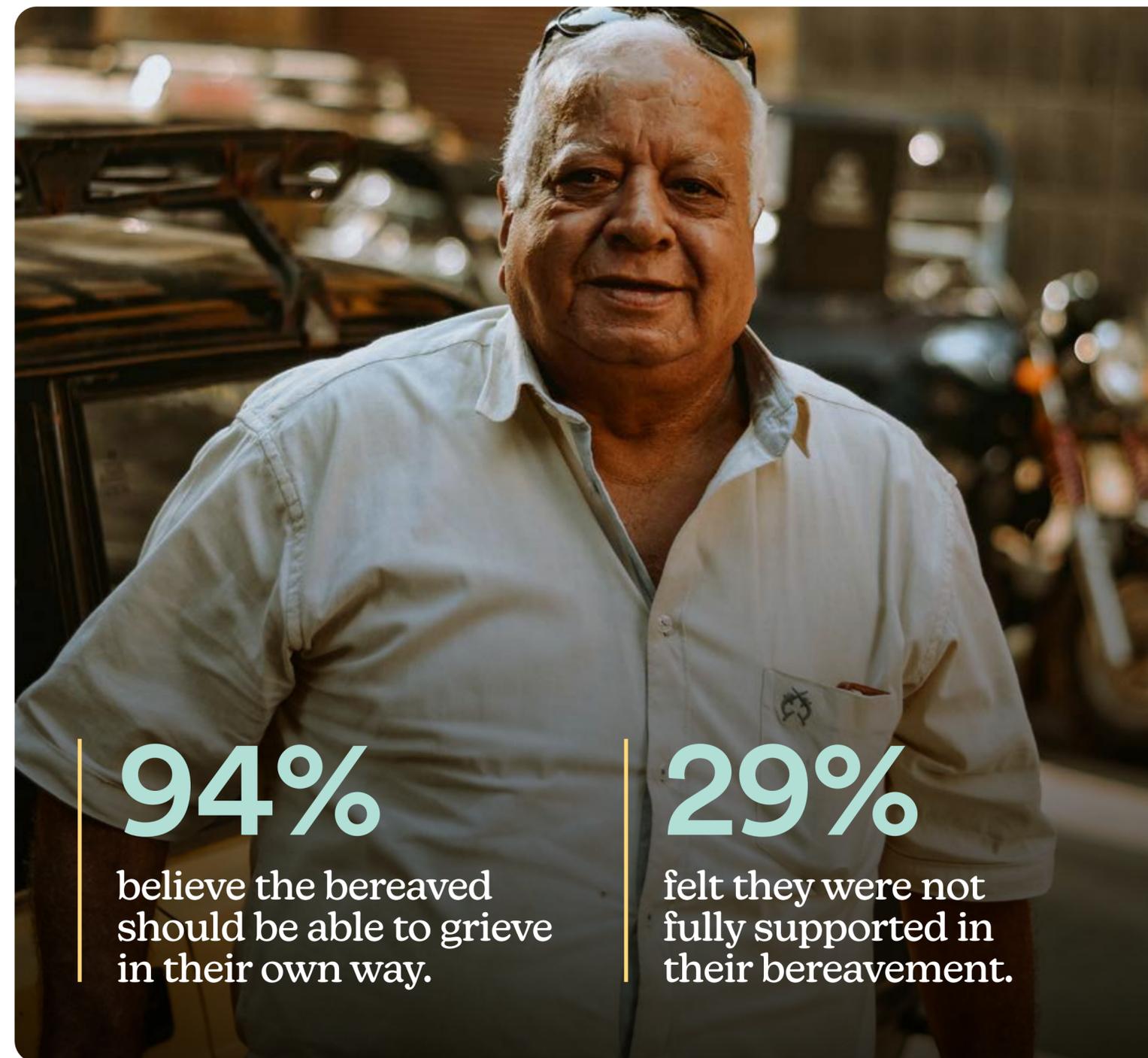
A recent study into the impact of bereavement support, by Aoun and Colleagues (2020), found only 5-10% of Australians accessed help from mental health professionals or bereavement support groups after a loved one died. Instead, the vast majority of respondents turned to informal supports, like family and friends (95%) for bereavement support, followed by funeral providers (81%), GPs (56%) palliative care services (20%), and school-based advisors (3%). However almost a third (29%) felt they were not fully supported in their

bereavement. Respondents rated family most 'helpful' (84%), followed by friends (80%), while also perceiving their funeral provider as helpful (76%). The study also found that those who felt they did not receive enough support reported the highest deterioration in their physical and mental wellbeing.

The study found funeral providers were the third most popular support (behind family and friends), with only 10% perceived as unhelpful. Thus, Aoun and colleagues concluded that 'funeral providers can play a crucial role in bolstering community capacity around death, dying and bereavement'. Despite this need for bereavement support, however, traditional funeral directors often don't include formalised grief support as part of their service offering, leaving the bereaved to seek their own support independently.

Professional supports, such as counsellors, psychiatrists, psychologists, and social workers, were not only the least utilised, but rated the highest proportions of perceived unhelpfulness. Aoun and colleagues recommended 'a systematic review of studies assessing professionals' knowledge, attitudes, skills, and/or training regarding grief' to better support bereaved clients. Also noted was that professional and public understandings of bereavement are often based on old theoretical models, such as Kubler-Ross's five stages of grief, and guided by social norms.

Consequently, grief experiences that do not match these 'normalised' models may cause the bereaved to feel even more confused or isolated (Aoun et al.) This indicates a need for better guidance in supporting the bereaved in not only knowing where they might seek help after a death, but also better professional models for specialised grief and bereavement care.



94%

believe the bereaved should be able to grieve in their own way.

29%

felt they were not fully supported in their bereavement.

WHAT WE WANT

Australians want intimate, well catered and increasingly non-traditional ceremonies. But there's a general lack of understanding of non-traditional options available to them.

CEREMONIES & DISPOSITION

A small number (23%) of survey participants of Bare's Funeral Beliefs and Values Study accept that a funeral service or memorial can take place after, rather than before, a cremation or burial.

Of those who believe a funeral or memorial service should be before a cremation or burial, two in three (67%) don't know of any alternatives to the traditional format. About a third (34%) said it was important to view the body of a deceased person.

Funeral ceremony vs non-attendance

Two in three people (66%) said it was important to hold a ceremony after someone dies. However, they are preferring a small, personal, and family-oriented gathering, rather than a larger public ceremony, with respondents indicating that's what the deceased would have wanted. Those that would prefer a non-attended funeral service, or direct cremation, cite simplicity, affordability, and the deceased's wishes as the reasons they would choose not to have an attended ceremony after the death of a loved one.

This is consistent with findings of a study by Woodthorpe et al. (2021) that suggests the recent shift towards 'invite-only' commemorative farewells and direct cremation offer adequate social support for attendees because they prioritise an individual's beliefs and values. They argue that society can no longer assume that contemporary public funeral ritual is necessary to provide psycho-social support after someone has died.

'Whether this is accelerated by the events of the COVID-19 pandemic and associated lockdown measures remains to be seen, but certainly there is much more to be learnt about the utility of UK funeral services and attendance in the twenty-first century.'

Even before funeral attendances were limited due to COVID-19, the perceived importance of attended funeral services was already being challenged by direct cremation packages in the UK, which were introduced in 2012 (Woodthorpe et al.). Similar findings were noted in a Rugg and Jones (2019) study into the components of a 'good funeral', which found that an attended, public funeral ceremony may 'not necessarily be the most important thing' after a person has died. Woodthorpe and colleagues concluded that there is a declining need for an attended funeral service because social support can come from alternative sources, including coming together elsewhere, at another time, and online. Likewise, Burrell and Selman's (2020) study found no conclusive evidence that funeral services benefit attendees. They found that the benefit of rituals farewelling the deceased, like funerals, depend on how the bereaved shape those rituals in a way that is most meaningful to them and what demonstrates the most social support.

Additionally, scholars like Woodthorpe and colleagues identified that 21st Century society understands that people have a legitimate choice to reject funeral norms and not have a public funeral service, in favour of an unattended direct cremation or invite-only commemorative event.

What's most important in a ceremony

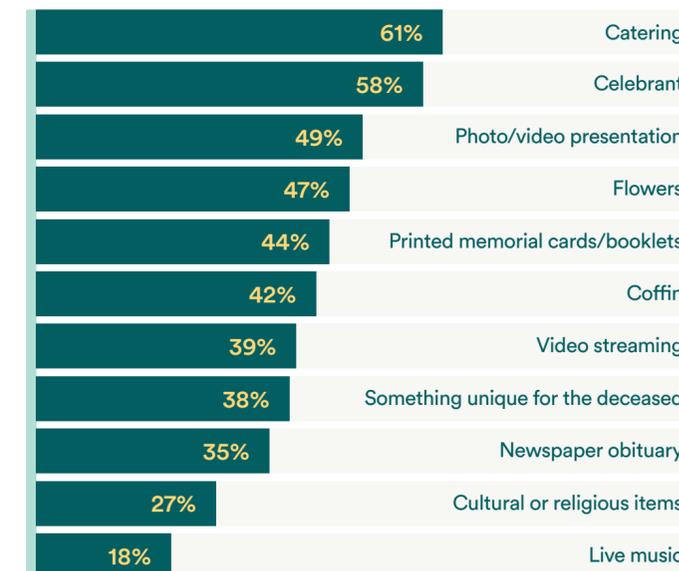
Respondents generally don't value the traditional components of a funeral, such as the presence of a casket or coffin, an organist, and religious elements, although they often aren't aware these are optional.

Despite a coffin or casket being a fairly low priority (27% said a coffin or casket was unimportant), most people are still willing to pay up to \$2,000 for one.

This has considerable implications on funeral affordability, as this component alone generally comprises a significant portion of the total funeral cost.

According to van der Lann and Moerman (2017), the price of a coffin or casket, on average, accounts for 31% of the total funeral cost.

In comparison, respondents ranked a celebrant as second on the list, but said \$500 was becoming unaffordable to hire a professional. Here's what percentage of people agreed each component was important to include in a funeral ceremony:



Like other Western countries, Australians are moving towards simpler methods of disposition such as cremation with scattering, in favour of more traditional burial practices, which are increasingly seen as outdated.

Cremation is the preferred method (71%) according to Bare's Funeral Beliefs and Values Study, with most respondents wanting some form of ashes scattering afterwards. Around 2 in 5 (43%) would want a scattering without a ceremony, while a quarter (24%) would want some form of attended scattering, but not as part of a traditional ceremony. →

“

CONSUMER COMMENTARY ON CREMATION

People are open to all manner of non-traditional scattering ideas:



“ My brother had some ashes shot out of a potato gun over a lake he sailed on.”



“ I want to be scattered in the garden of my own property, where we enjoyed our time and to remain close to where our family dog is buried.”



“ Split my ashes into 100 portions and scatter them all over the world.”



“ I want my ashes scattered in private without ceremony and not to be disclosed to anyone so that no one visits the site ever.”

WHAT WE WANT

What's most important in a ceremony (Cont.)

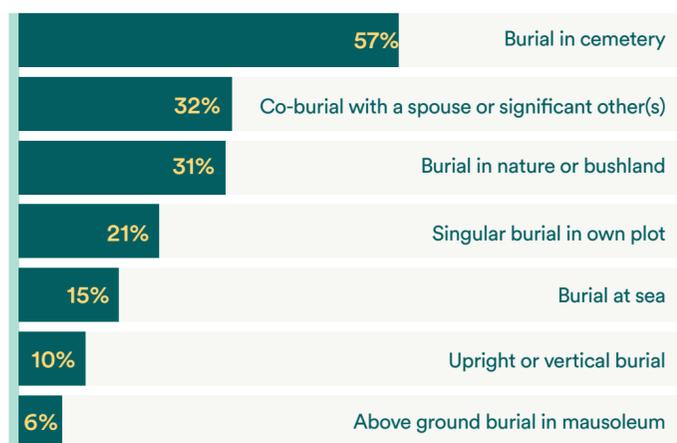
The DeathTech Research Team (2020) survey [n=1,042] indicated the most popular place to be scattered is in nature (42%) or a personally meaningful location (41%), followed by at sea (26%) or distributed amongst loved ones (21%). Only one-fifth of these respondents (20%) wished to be stored in a cemetery or columbarium.

Of those who indicated a willingness to be buried, most (57%) wanted a cemetery. Almost a third (31%) wanted to be buried in nature, and another third (32%) wished to be co-buried with a spouse or significant other.

This view is supported by the DeathTech Research Team (2020) study, which indicated a general neutral sentiment towards alternative, or new methods of body disposal and new technologies at crematoria. The study found the most widely recognised methods of disposal were also viewed in the most positive light. When respondents were asked to rate their feelings about each method of disposal as an option for themselves, only cremation was rated positively by a majority of respondents (67%). Full body donation and conventional burial also received generally favourable responses.

Aside from conventional burial and cremation, the DeathTech Research Team study found the most widely recognised methods of disposal were full-body donation for medical research (54%), burial at sea (42%), cryonics (31%) and natural or green burial (25%). Relatively few respondents had heard of upright burial (17%), human composting (10%), promession or freeze-drying (6%), alkaline hydrolysis (4%) or plastination (3%).

What would you like to happen to your remains?



(Source: Funeral Beliefs and Values Study, n= 567)

Of those considering funeral and interment wishes:

71%
aren't aware of alternatives to using a coffin or casket.

42%
think coffins and caskets are an important element of a funeral.

32%
either think they are either a legal or a religious requirement.



WHAT WE WANT

Australians value the role of funeral directors, and point to affordability, honesty and enough time to make decisions as critical aspects of their decision-making.



“

CONSUMER COMMENTARY ON FUNERAL DIRECTORS

“ I don't feel you need even more unexpected added expenses at such a difficult time. It's expensive enough without adding another expense.”

“ I wouldn't feel comfortable sharing all the details of their life with a stranger.”

“ I would want to keep it very simple. Just arrange the private cremation and scattering myself.”

FUNERAL DIRECTORS

When a loved one dies, it is a daunting and near-impossible task for families to navigate the legal requirements of body disposal themselves and engage with crematoria staff directly. Furthermore, 'funeral directors still retain a monopoly over funerals and are therefore influential in the market and control prices' (van der Lann and Moerman, 2017).

The Family and Community Development Committee (2005) parliamentary inquiry into Regulation of the Funeral Industry, regarded paying for a funeral as a 'distress purchase'. This means consumers arranging an at-need funeral are generally in a state of distress with limited time and knowledge of the available options, so the price is often not the greatest concern. 'Therefore, consumers are at risk of committing to expensive funerals' the report noted.

The report indicated the need for more readily available price information to improve consumer understanding of what they are purchasing and to allow comparisons from a number of funeral providers so they could make an informed choice.

Choosing to use a funeral director

Three in five 61% of respondents in Bare's Funeral Beliefs and Values Study [n= 1026] say they would use a funeral director to help plan a funeral or memorial. The 18% who would not hire a professional said they would prefer a family-led service either to minimise costs, to allow more personalisation, or for a low-fuss send-off.

If they had to choose a funeral provider, almost half of respondents (46%) said they would ask a relative or friend for a recommendation. Two-thirds (31%) would do an internet search, while 1 in 5 (20%) already had a provider in mind. More than half of Bare's Funeral Opinions and Industry Study (57%) would prefer an independent funeral provider rather than a provider owned by a large corporation. Only 3% disagreed.

The same percentage of respondents of Bare's Funeral Beliefs and Values Study (57%) agree that it's better to get end-of-life planning advice from independent sources. Only 5% disagreed. Around 2 in 3 (69%) said they wanted funeral providers to disclose their commercial relationships or incentives with the product suppliers and service providers they recommend. This tells us that consumers want funeral providers to make recommendations based on honesty, integrity and transparency during the funeral planning process.

What Australians value in a funeral director

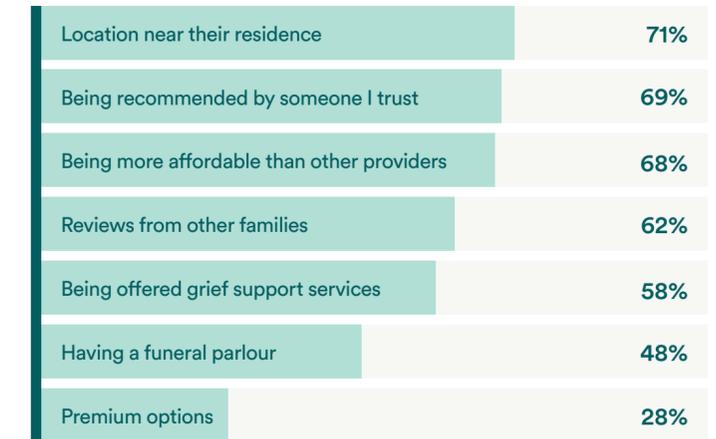
When choosing a funeral director, the attributes Australians value above all others (in order of importance) are:

- 1 Affordability
- 2 Professionalism
- 3 Honesty
- 4 Empathy

Australians want funeral directors who:



They are least concerned about:



Source: Funeral Experiences Study, n= 1468

WHAT WE EXPERIENCE

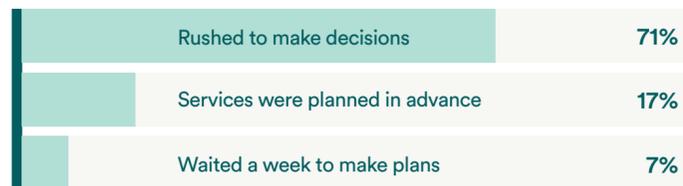
Australians place great trust in their funeral director to assist in decision-making. While most know the deceased’s basic requirements, the funeral director has a large influence on the service they ultimately arrange.

DECISION-MAKING

Of those who have arranged a loved one’s funeral, 4% said they didn’t use the service of a professional funeral provider. Some chose a family-led funeral due to religious traditions or COVID restrictions, others said it was the deceased’s wish for a private farewell, or that funeral directors are too expensive for them.

When decisions were made

When making funeral decisions, less than 1 in 5 (17%) services were planned in advance, before the loved one had passed. This is in contrast to 71% of respondents who rushed to make decisions regarding funeral arrangements immediately after a loved one passed away. A small portion (7%) waited a week to make plans.



Source: Funeral Experiences Study, n= 878

How decisions were made

Of those who arranged a funeral for a loved one who left a will, 9% didn’t know where to find it. Less than half (44%) agreed that the will included clear directions regarding funeral wishes, and just over half (52%) agreed that the will included clear instructions for preferred body disposition. (Source: Funeral Experiences Study, n= 628)

Despite this, most respondents (77%) of Bare’s Funeral Experiences Study [n= 878] felt they had a clear understanding of the deceased’s wishes regarding the funeral and what should happen to the body, before starting the arrangement process. For those who didn’t have a clear idea of the deceased’s funeral wishes, a third (37%) sought advice to guide their decisions, while two thirds (63%) made decisions based on what they thought was right.

Where to get advice

When it came to seeking information about funeral planning, most respondents said they relied on a funeral director for the majority of information, slightly ahead of friends and family. Despite this, 11% were unsure whether the information they received from the funeral provider was accurate. (Source: Funeral Experiences Study, n= 799) Internet searches and government websites ranked lowest for places people went to for funeral planning information.

Where people got their information

- 1 Funeral Director
- 2 Family and friends
- 3 Previous experience
- 4 Religious or cultural leader
- 5 Internet searches
- 6 Government websites

Final disposition

Of those who have planned a funeral for a loved one in the past, 2 in 3 chose cremation (64%), compared with a third who chose burial (36%). Source: Funeral Experiences Study, n= 878



13%

felt they were rushed to make a decision on which funeral provider to use

11%

felt pressure to buy services or products they felt they either didn’t need or were too expensive.

WHAT WE EXPERIENCE

Despite affordability being one of the major concerns in arranging a funeral, the majority of Australians do not get a quote for a service.

AFFORDABILITY

Affordability remains a broad issue within the funeral industry. More than a quarter of Australians who have arranged a loved one's funeral (26%) experienced some form of financial hardship after paying for it (Bare's Funeral Opinions and Industry Study, n= 602).

Additionally, the study also found that 2 in 5 people (40%) know someone who has experienced financial hardship after paying for a funeral. Consequently, two-thirds (67%) believe funerals in Australia are overpriced and 45% say the funeral industry needs to change.

Two in three (63%) respondents said they didn't get a quote before agreeing to a funeral service. Of those who did ask for a cost beforehand, most accepted the first quote they were given.

Emotion was a motivating factor in respondents not getting more quotes, if any. A third (36%) said they felt too overcome with emotion to look elsewhere, while 27% said they felt it wasn't right to price-match for a funeral. 12% felt pressured by the funeral director to proceed right away, however two thirds (62%) said they were happy to accept the service promised.

In order to cover costs of a loved one's funeral, 7% say they would need to apply for a bank loan, while 19% would depend on family or friends (Bare's Funeral Experiences Study, n= 878). Additionally, 1 in 3 (32%) Australian seniors experienced hardship after paying for a loved one's funeral, according to The Cost of Death Survey commissioned by Australian Seniors.

The end-of-life process involves several components:

- The body disposition, commonly a cremation or burial
- The ceremony or send-off, commonly referred to as to the 'funeral' or memorial service; and
- The memorial site or 'place' for loved ones to visit to memorialise the deceased - commonly a headstone if buried, or an urn the site or the place where ashes were interred.

In their study of pricing data collected from funeral providers, van der Lann and Moerman (2017) observed a general practice of 'packaged' or 'bundled' components as a total price, rather than providing an itemised price list. When researching prices online, they also noted an inconsistency of pricing.

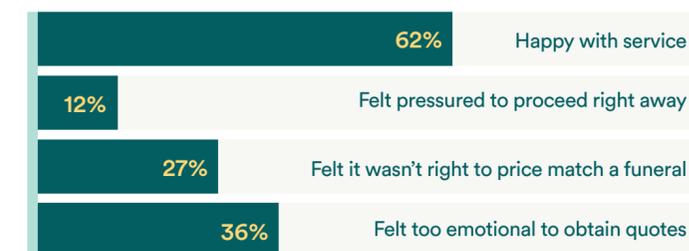
They found a direct committal without an attended ceremony generally cost between \$1,200 and \$3,950, whereas a 'budget funeral' cost between \$2,400 and \$6,500. However, after making direct contact with the funeral operator by phone, prices varied more widely.

Additionally, the study found the mark-up on coffins and caskets often exceeded 100% from wholesale to retail, which allowed funeral providers 'to cross-subsidise other less profitable areas of operations'.

'Without the ability to bypass the funeral director as the sole supplier of coffins, consumers are subject to a market where funeral directors can manipulate prices to their own advantage by the closed nature of their business.'

As noted by industry researchers, consumers agree to funeral components that they accept as standard practice. Without a full understanding of what they are paying for, Australians risk spending more than they can afford. This is further exacerbated by the timeliness these decisions require in order to arrange a ceremony within days of a loved one's passing. Additionally, van der Lann and Moerman noted that regional consumers faced further affordability impacts due to the limited choice of funeral providers available.

Bare's Funeral Experiences Study found pricing was a consistent theme for those who have planned a loved one's funeral, along with service and choice. About 1 in 5 of those who obtained a quote (18%) found the bill ended up being more expensive: 12% said the final cost was somewhat more expensive, while a further 6% said it was significantly more expensive [n= 294].



(Source: Funeral Beliefs and Values Study, n= 567)

63%

didn't get a quote before agreeing to a funeral service.

36%

felt too overcome with emotion to obtain more quotes.



CONSUMER COMMENTARY ON AFFORDABILITY



"I would like to know for sure that I did not have to worry about finding the money to do anything in regards to respecting their wishes."



"Reduce funeral costs by cutting out unnecessary extravagant side charges. What is wrong with simple garden flowers?"



"The cost is another sting to the living when they're already vulnerable and dealing with grief."



"I think it's become a dirty industry. Families need to take more time to understand what their loved ones want within a realistic budget available to that family."

WHAT WE EXPERIENCE

Australians are generally satisfied with their funeral directors, but don't feel comfortable complaining, or know where to turn if there is an issue.

SATISFACTION WITH THE SERVICE

Often there is a disconnect between what consumers outline they want - affordability, not to be rushed, personalised and intimate gatherings - with what they receive from funeral directors. Yet satisfaction with Funeral Directors is relatively high. This illustrates the influence of the funeral director in setting customer expectations and influencing the customer's decision-making.

When people were dissatisfied with their funeral provider, very few people complained. A common reason was that they didn't know where to complain to. Another was the social pressure to not "cause a fuss".

Perhaps more concerningly, most felt that if they did complain, it wouldn't result in anything regardless.

Of those who were dissatisfied with their funeral provider:

49%

didn't know who to issue their complaint to.

70%

felt a complaint would have been a lost cause.

74%

weren't in the right emotional state to issue a complaint.

30%

were discouraged from issuing a complaint.

OUR FUTURE

Cremation continues to grow in popularity here and worldwide. Beyond this and burial, other methods suffer from very low awareness.



71%

chose cremation when organising a funeral for a loved one.

25%

would opt for a traditional burial.

FINAL DISPOSITION

The declining impacts of religion and culture in Australian society, combined with environmental and economical concerns, have contributed to cremation being the increasingly preferred method of interment.

As in many Western countries, cremation in Australia has eclipsed burials as the preferred method of disposition, accounting for two-thirds of deaths (van der Lann and Moerman, 2017). This is consistent with our Funeral Beliefs and Values Study which shows that 2 in 3 (63%) people who have arranged a funeral for a loved one, chose a cremation. According to the former study, people are getting more imaginative with cremated remains as well.

‘Cremated remains (ashes or cremains) provide opportunities for innovative products such as the incorporation of ashes into keepsakes (teddy bears, vinyl records, pencils etc), jewellery, fireworks and even tattoo ink.’

- van der Lann and Moerman, 2017.

Cremation is widely popular in Western countries, with rates over 95% in Japan, Nepal and Thailand. On the other hand, majority-Catholic countries like Greece (0.4%) and Italy (31%) account for some of the lowest proportions of cremations per capita (The Cremation Society, 2019).

Japan experiences the world’s leading cremation rate, at 99.97% according to 2018 international cremation statistics. Australia’s cremation was 69%, slightly behind New Zealand at 75%. Similarly, the UK’s cremation rate was 78%, slightly ahead of Canada’s 73%. Cremation is not as popular in the nearby United States with a national rate of 55%, however rates vary considerably among states, although noting a steady upward trend in recent years.

If respondents in Bare’s Funeral Beliefs and Values Study were to arrange a funeral in the future, 71% said they would choose cremation, compared with a quarter (25%) who would choose burial. The scholars note that the trend coincides with the substantial decline in Christian church attendance, the rise of other religious practices, as well as environmental concerns and the fixed physical placement of remains seemingly less important in the 21st century (van der Lann and Moerman).

The remaining 4% would prefer an alternative method of interment, such as donating the body to medical research, a sea burial or an eco-burial. The consideration of alternative methods of interment highlights respondents’ awareness of the growing challenges faced by the contemporary Western cemetery model, particularly regarding environmental and financial concerns. The findings suggest that Australians are open to alternative methods of interment. This is consistent with the DeathTech Research Team (2020) study, which noted that cemeteries worldwide ‘have begun to adopt new technologies to improve their visitors’ experiences, reduce their facilities’ environmental footprints, and extend the personalisation of services in response to diversifying community desires’.

COVID-19 AS A CATALYST FOR CHANGE

COVID-19 has forced big changes across the industry, forcing technological innovation and reshaping customer desires, pushing towards greater customisation. Funeral service providers have reported a popularisation of ‘no service’ or direct cremation, largely due to the impacts of COVID-19.

Additionally, COVID-19 has become an accelerator for funeral service providers to adapt to modern approaches to memorialisation. The rise of technology has enabled the funeral industry to move online, with live streaming, digital recording and the digitisation of documentation - including by government departments. The move towards electronic acceptance of accounts, repatriation documents and certificates has been a positive change noted by industry respondents in Gould and Holleran’s (2021) study. We expect to see the sector further enhance digitisation to enable Australians to create digital memorials of loved ones in the future.

Similarly, COVID-19 limitations also created a turning point for how Australians approach funeral planning, expected beyond the pandemic, Gould and Holleran’s study found. Consumers today understand that non-traditional funeral and memorial elements are increasingly possible. Therefore we expect to see more bespoke send-offs in a post-pandemic world.

“We are seeing far greater customisation of funerals, partly through technology, partly through the consumer demands of the current generation... You know, it’s not 30 minutes with a Vibe with Me and The Lord’s Prayer. It’s now in one hour 15 with the PowerPoint and you know, ACDC or something.”

- Robert Pitt, of Adelaide Cemeteries, as quoted in the Gould and Holleran (2021) study.

The pandemic has also instigated a general willingness to talk about death and break the taboos of end-of-life planning. This increased awareness caused a spike in pre-purchased and pre-planned funerals (Gould and Holleran). Consumers increasingly understand the benefits of planning ahead, and the concept of pre-planning one’s own funeral has become less of a taboo. We expect this to become a normalised element of estate planning for seniors, just as they might make a will or appoint a Power of Attorney.

CONCLUSION

Australian's preferences for funeral arrangement and end-of-life planning are unique. They are also evolving. Without equivalent evolution in the funeral industry, the disconnect between what they want, and what they receive, will continue to widen.

Australians are unique in the way they approach funeral arrangement and end of life planning. The data highlighted some interesting anomalies that require further investigation. Three of the most insightful are:

We want to honour our loved one's wishes, but individually we don't make detailed plans for the people we leave behind.

It's clear that effective preplanning is extremely valuable in providing clarity on what exact preferences are. Increased awareness of end-of-life planning documentation, including Wills, Estate Planning, Advance Care Planning and Prepaid Funerals will play a key role in alleviating the tension caused by lack of information.

We want personalised, unique ceremonies and memorials for our loved ones, but we don't know what our options are.

It was evident via the survey that Australian funeral preferences have changed from yesteryear. As modern Australia moves further away from religion and formal ceremony, we expect to see more customers seek out non-traditional options. The data also tells us that customers are looking for increased affordability and personalisation, along with high quality information and options to make the right choice for their loved one. It will be incumbent on the funeral director to evolve their services to meet these needs.

Our objective customer needs prior to arranging a funeral are often not met, however we rarely complain and often are satisfied with the service we were provided.

It's unquestioned that consumers still value the role of funeral directors to guide them through an incredibly difficult moment in their life. The trust placed in a funeral director by a customer is immense, and their influence cannot be understated.

This is illustrated by the disconnect between the customers' objective needs prior to arrangement, compared to what they received as part of their service. Even in instances where customer didn't get their objective needs met, the majority are still satisfied with the service they received. Some of this can be attributed to people feeling uncomfortable complaining about the subject matter, but it's likely more complicated than that. The trust placed in the funeral director to guide them, and set expectations based on the service what they are able to provide, versus what the customer actually wants. This is an important area of follow up research.

Whilst the surveys conducted were comprehensive, they only scratch the surface of what drives the needs, preferences and ultimate decision making in funeral arrangements and end-of-life planning. We hope that this report plays a foundational role in understanding these complexities and encourages continued research into the evolving funeral landscape in Australia.



CONCLUSION

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