

Plant-based dieting and meat attachment: Protein wars and the changing Canadian consumer (Preliminary Results)

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High-Level Findings

- **Canadians going meatless:** Study estimates over 6.4 million Canadians have dietary preferences, which reduces or eliminates meat consumption;
- **32.2% of Canadians** are thinking of reducing their meat consumption over the next 6 months;
- **63% of Vegans** in Canada are under the age of 38
- **42% of Flexitarians** are Boomers
- **Health, Animal Welfare, the Environment and Taste** appear to be major factors for this shift;
- **Younger** consumers less likely to believe that eating meat is a **fundamental right**;
- **Women** appear to recognize substitutes for meat more so than **men**;
- **Lab-grown meat** and **insects/bugs** unpopular as protein alternatives

Survey performance

- Aim of survey: This exploratory study will consist of an online survey administered to Canadian consumers to determine their attachment to meat consumption and willingness to adopt a plant-based diet. The results of this study will aid in our understanding of how Canadians view protein consumption and how it can affect their lives in the future.
- Survey duration: 3 days, September 2018;
- Sample size: $n=1027$.



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Survey performance

- Bilingual survey, Cross-Canada study (including Québec);
- Respondents were required to be 18 years old and must have been living in Canada for at least the last 12 months;
- Completion rate: 96%;
- Average duration of survey: 6.5 minutes;
- Representative sample for Canadian market;
- Estimated margin of error: 3.0%, 19 times out of 20.

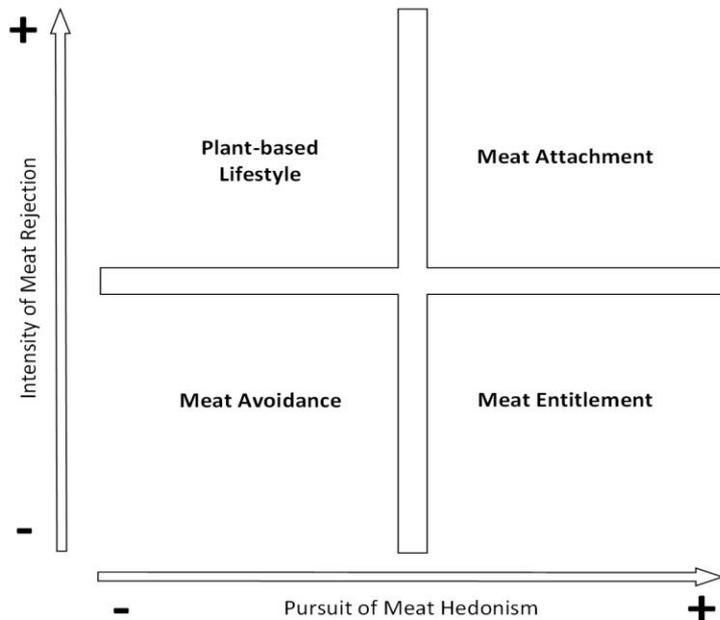
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Conceptual Framework

Figure 1

Interplay between dimensions of meat consumption preferences



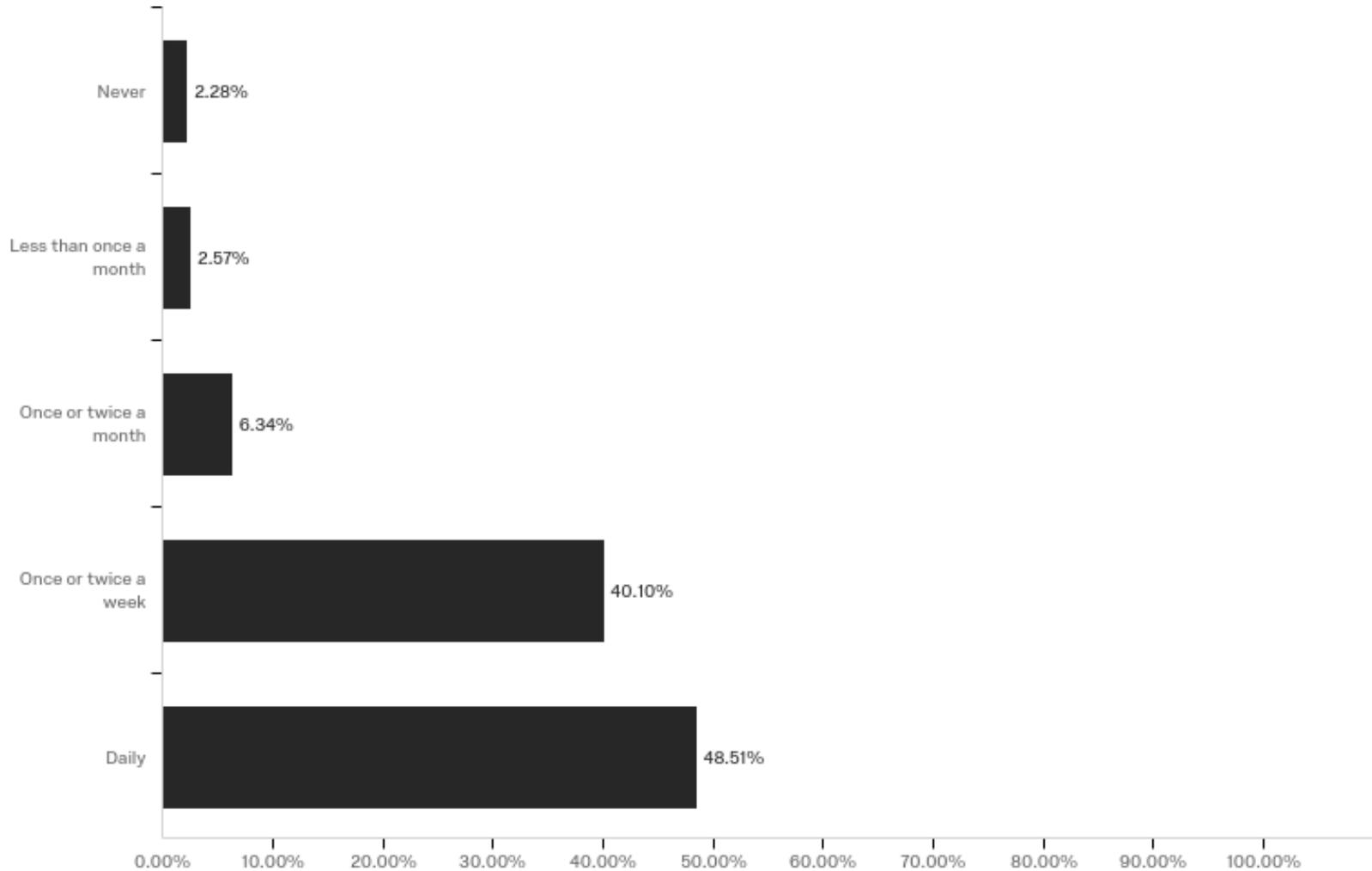
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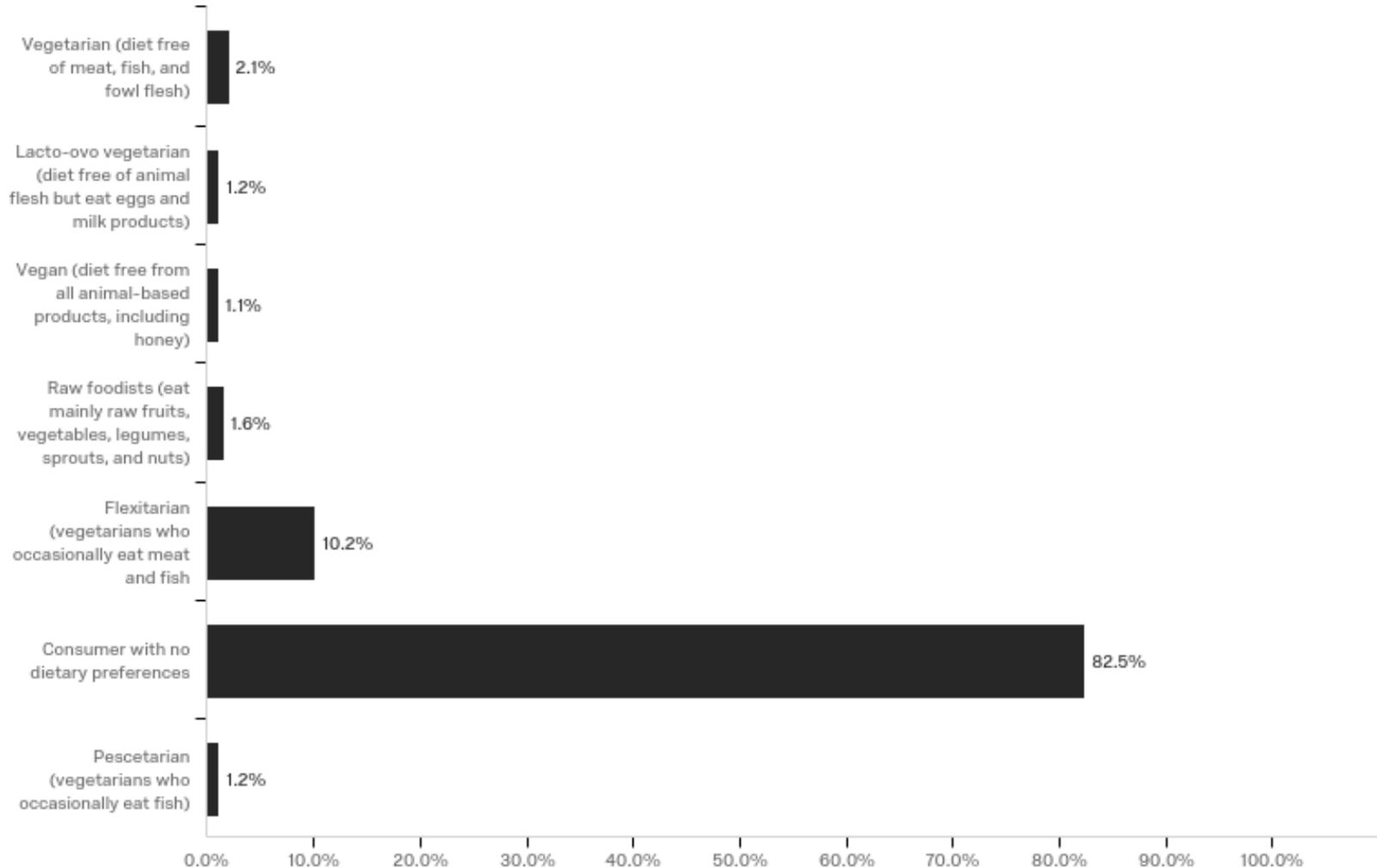
Meat Consumption (General)

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On average how often do you consume meat or products that include meat?

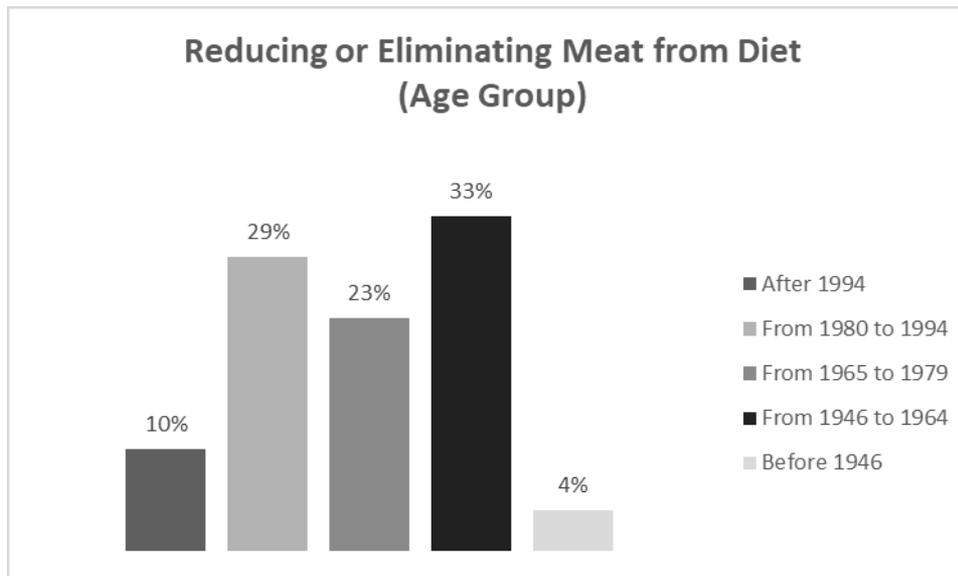


Please chose the answer that most represents your dietary choices. As a consumer, I consider myself a...

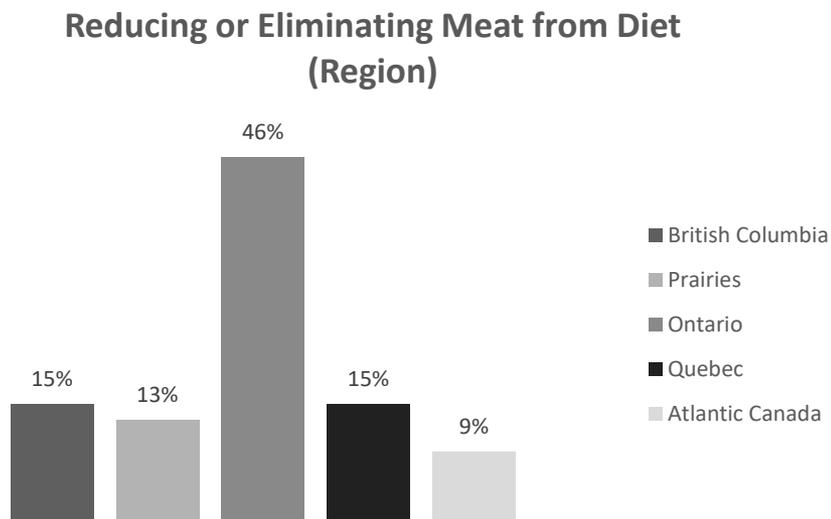


63% of Vegans are under the age of 38 (Millennials and Gen Ys)

42% of Flexitarians are Boomers



Over 6,400,000 Canadians follow a diet which restricts meat consumption

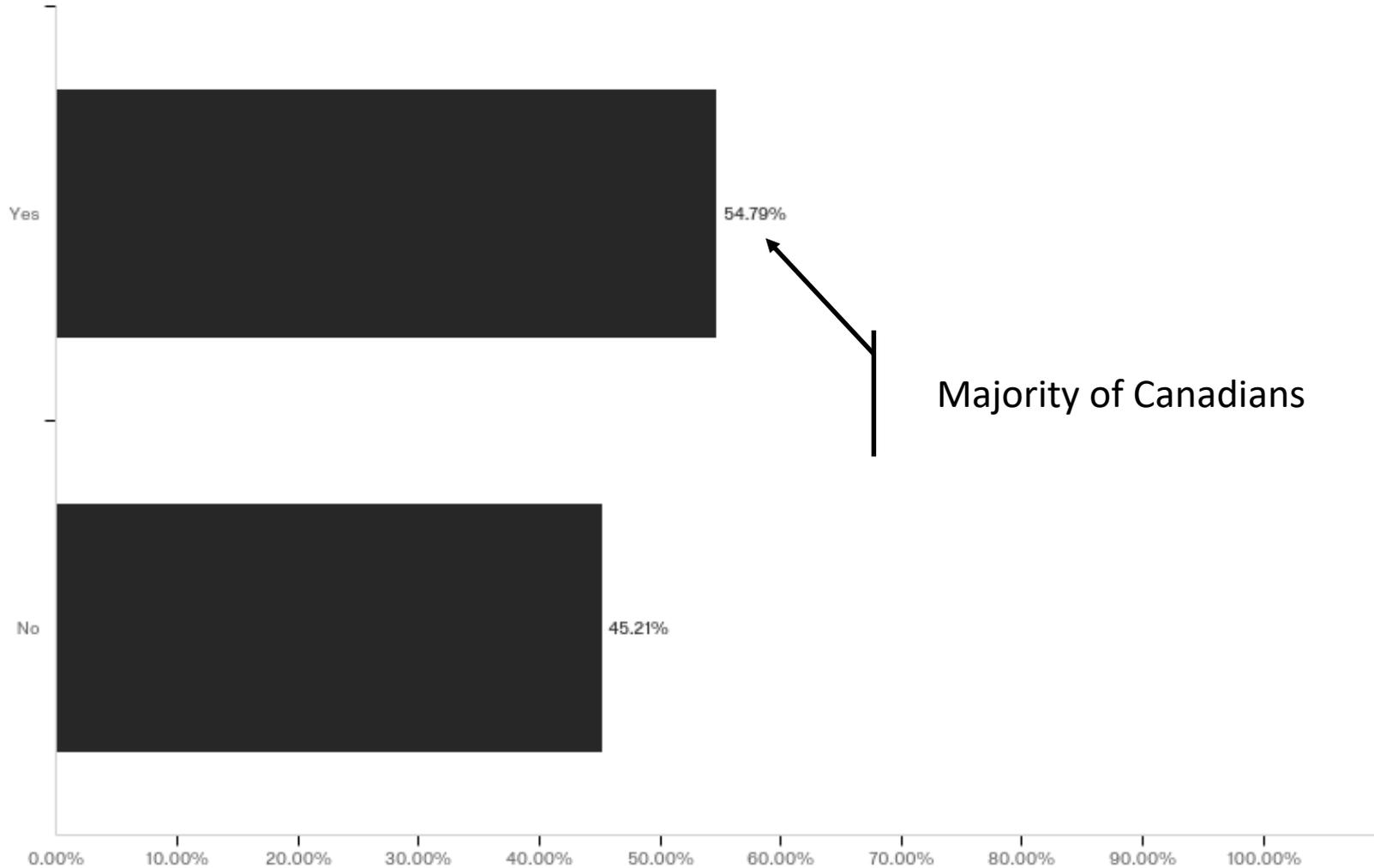




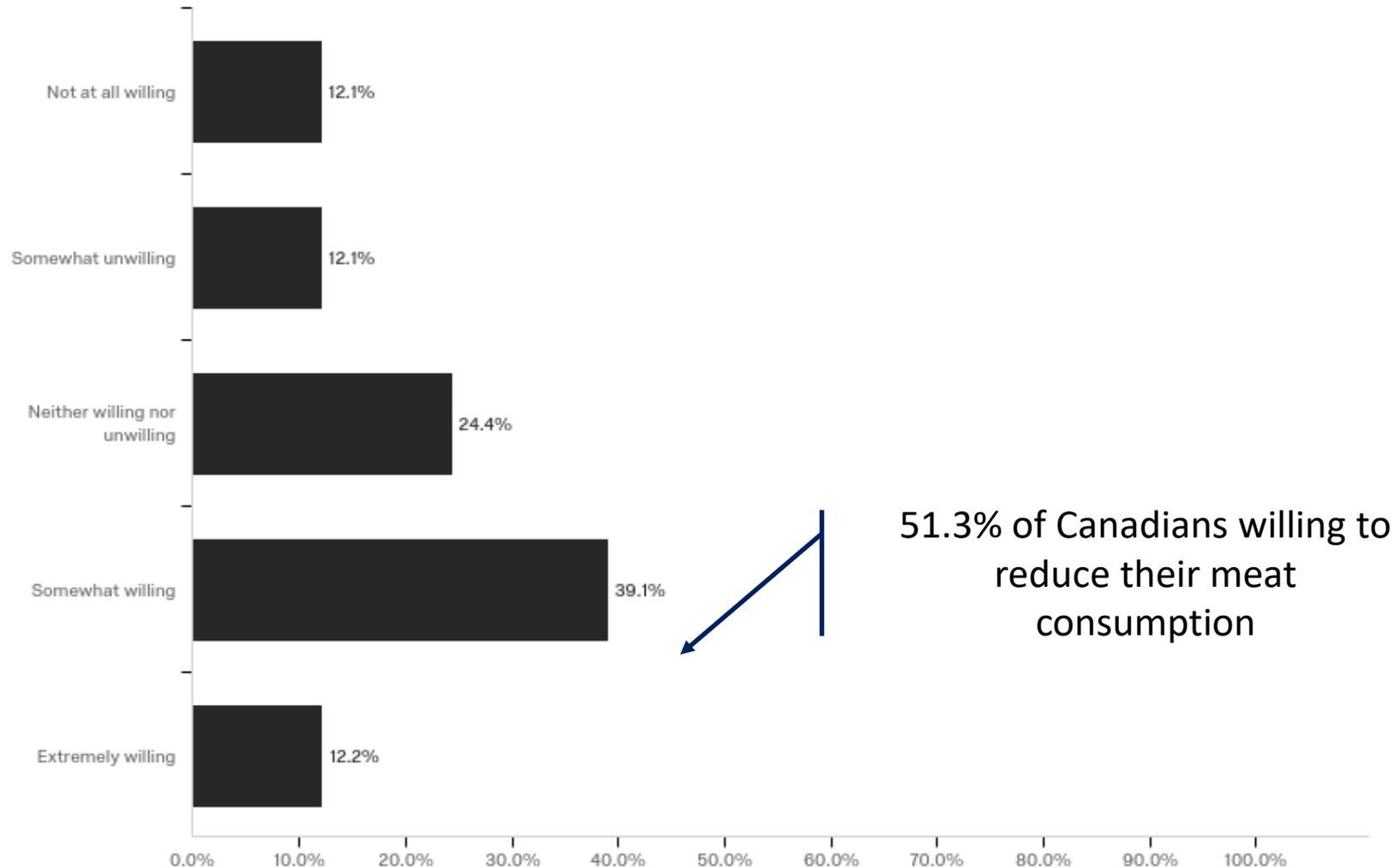
Meat Consumption (Trends)

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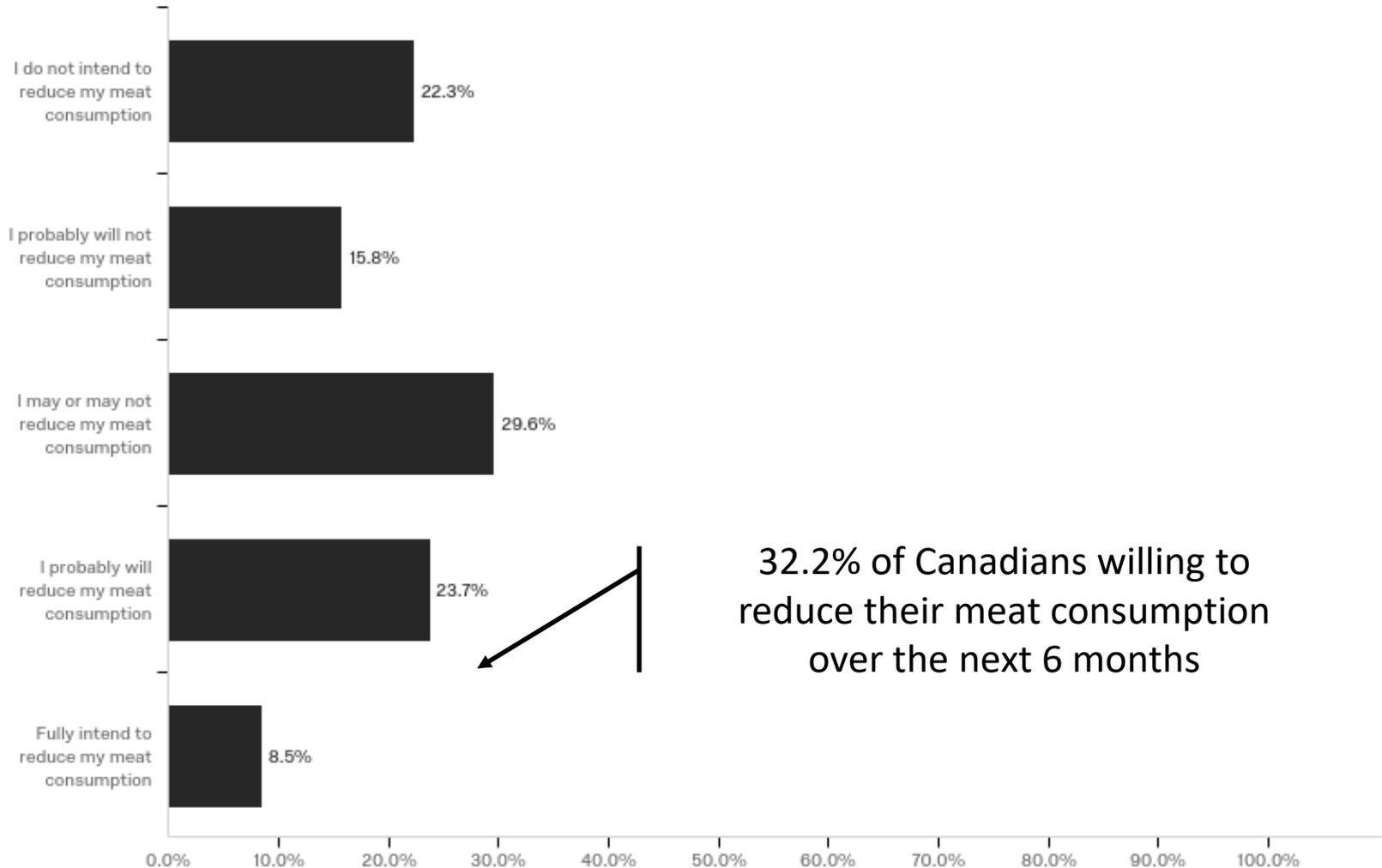
In the past, have you thought at some point of making any efforts to reduce your personal meat consumption?



How willing would you be to consider reducing your meat consumption sometime in the future?



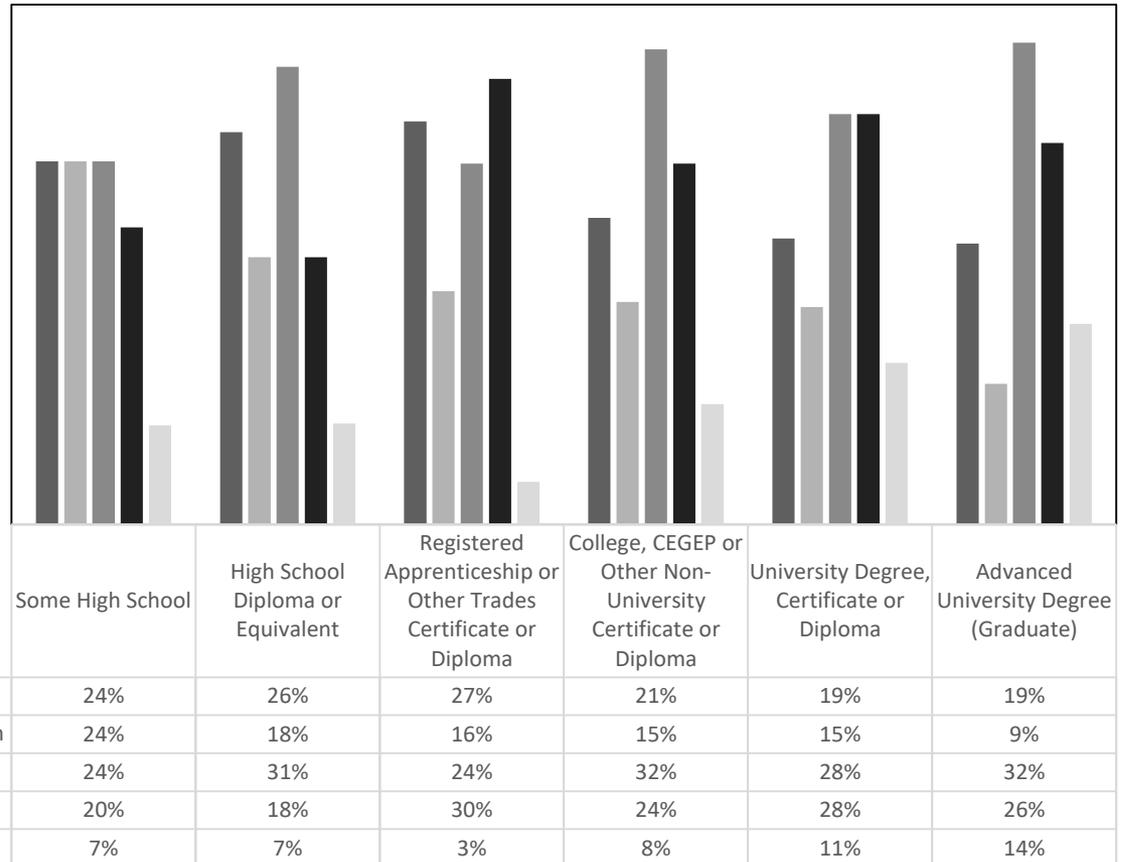
Specifically, in the next six months do you intend to reduce your meat consumption?



32.2% of Canadians willing to reduce their meat consumption over the next 6 months

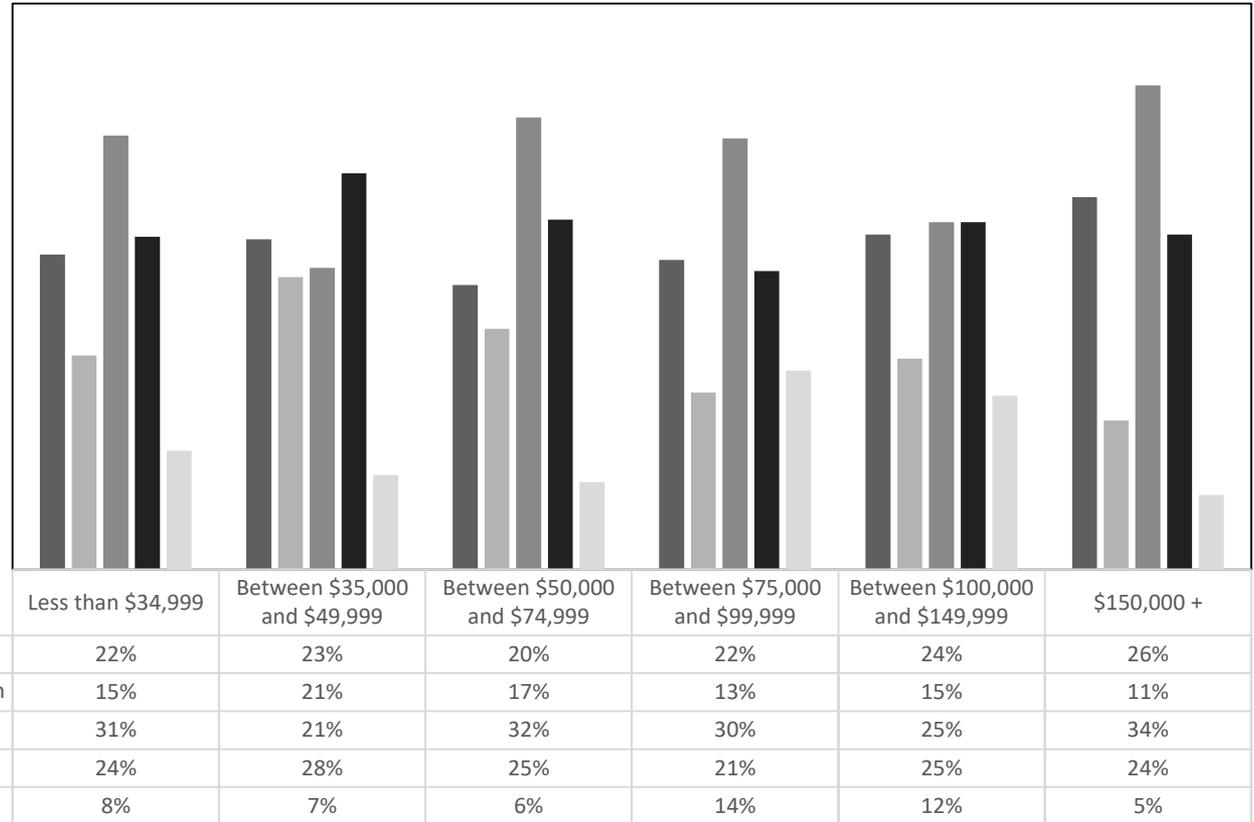
Specifically, in the next six months do you intend to reduce your meat consumption?

Consumers with graduate degrees more likely to want to reduce meat consumption over next 6 months (with one exception (Trades and Diploma))



Specifically, in the next six months do you intend to reduce your meat consumption?

Consumers earning between \$75,000 and \$99,999 appear to want to reduce meat consumption over the next 6 months, more so than other groups



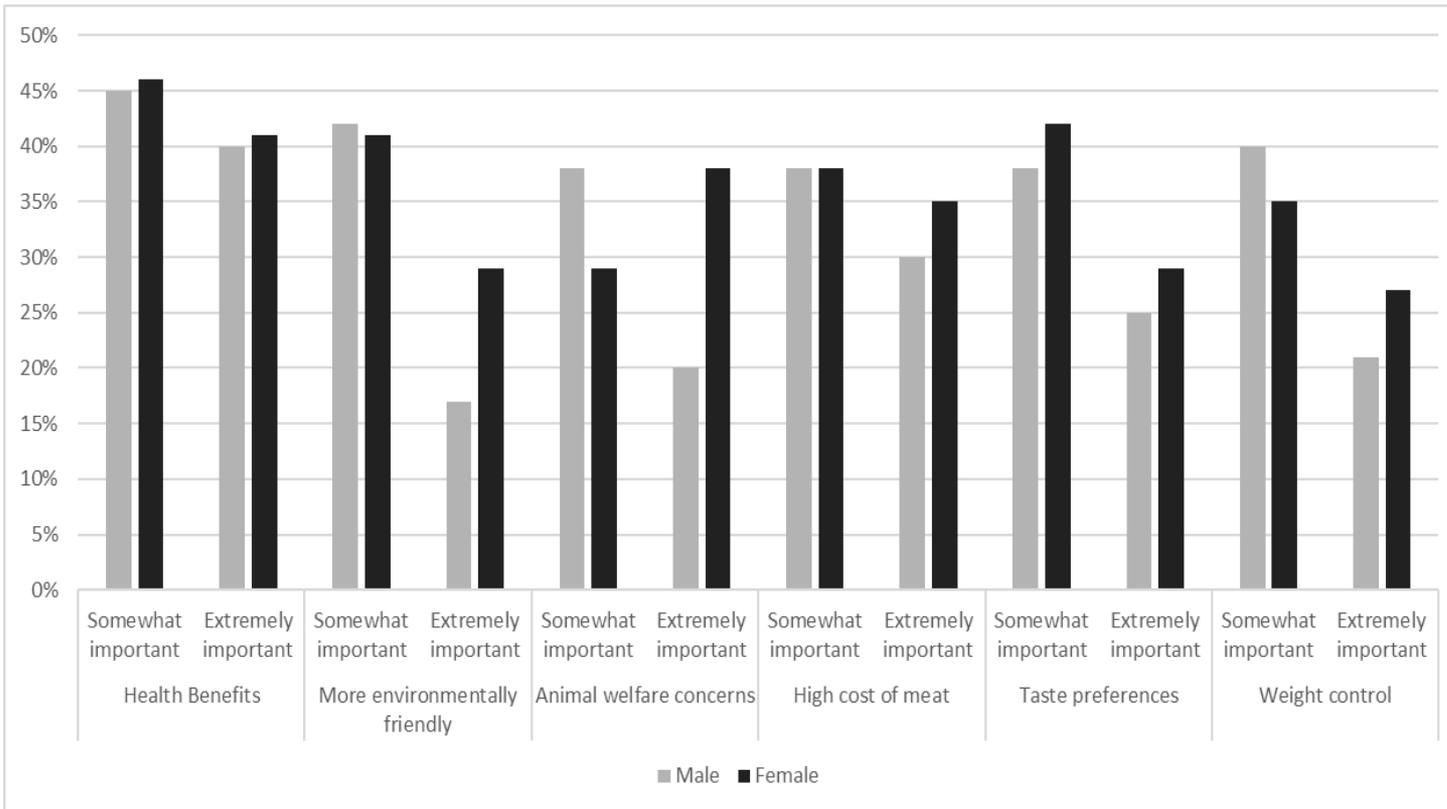
- I do not intend to reduce my meat consumption
- I probably will not reduce my meat consumption
- I may or may not reduce my meat consumption
- I probably will reduce my meat consumption
- Fully intend to reduce my meat consumption



Meat Consumption (Factors)

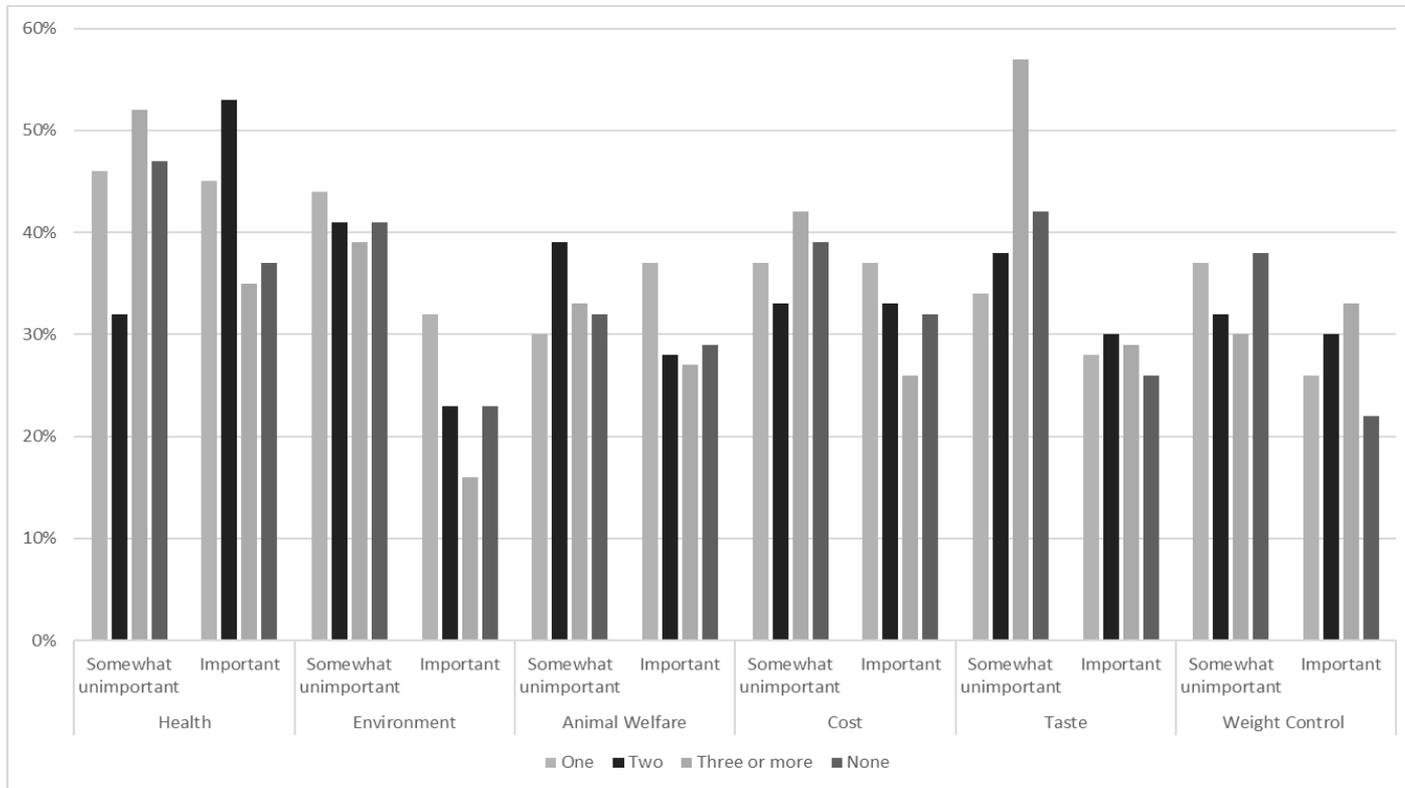
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How important were each of the following factors in influencing your initial decision to lower your overall meat intake?



Health benefits appear to be important for both genders. **Women** appear to be more concerned about **animal welfare** and **taste preferences**. **Other factors** generated mixed results

How important were each of the following factors in influencing your initial decision to lower your overall meat intake?



More than half of households with three children or more appear to be more influenced by taste preferences, while more than half of households with two children are concerned about health benefits

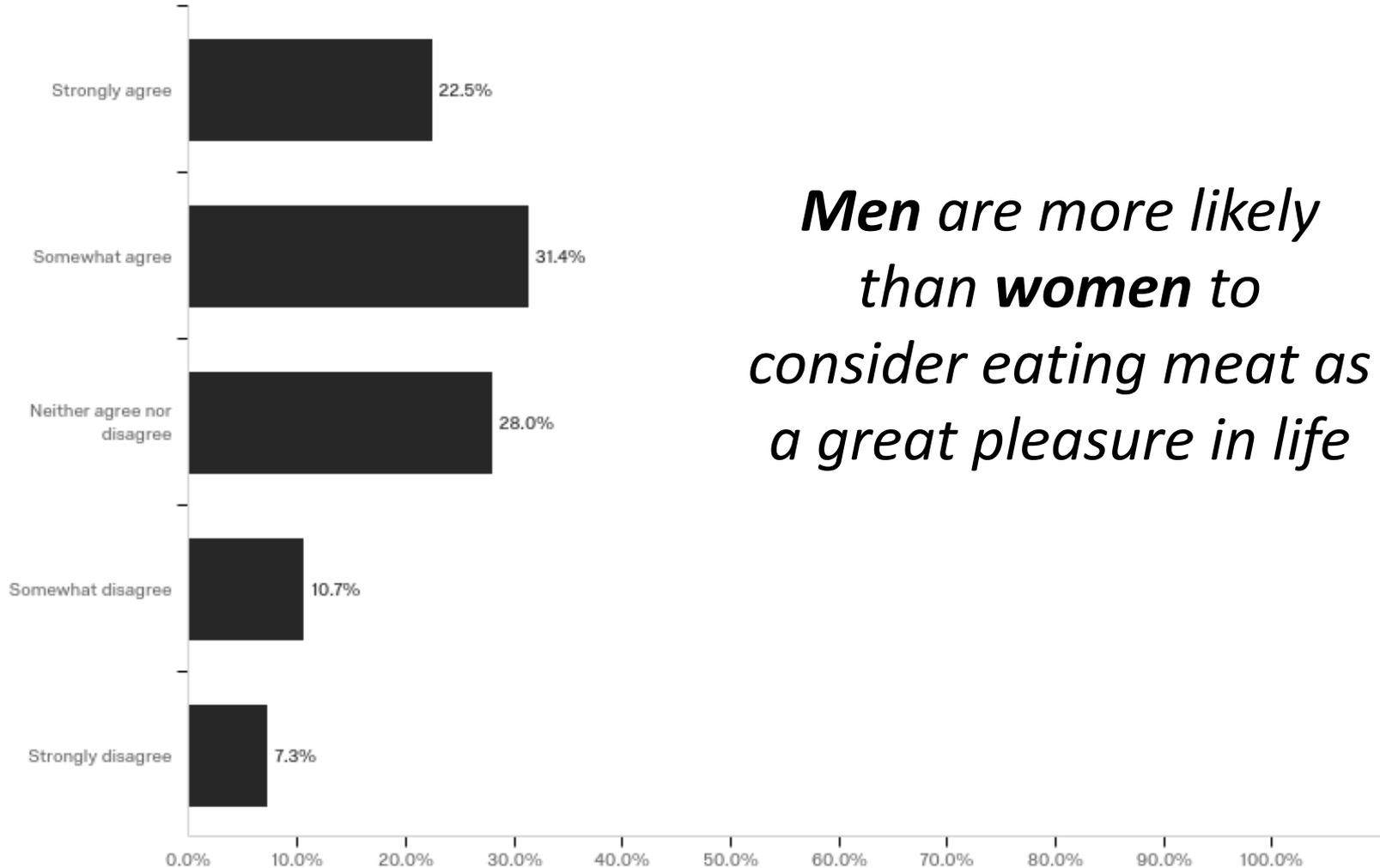


Meat Attachment (Appeal)

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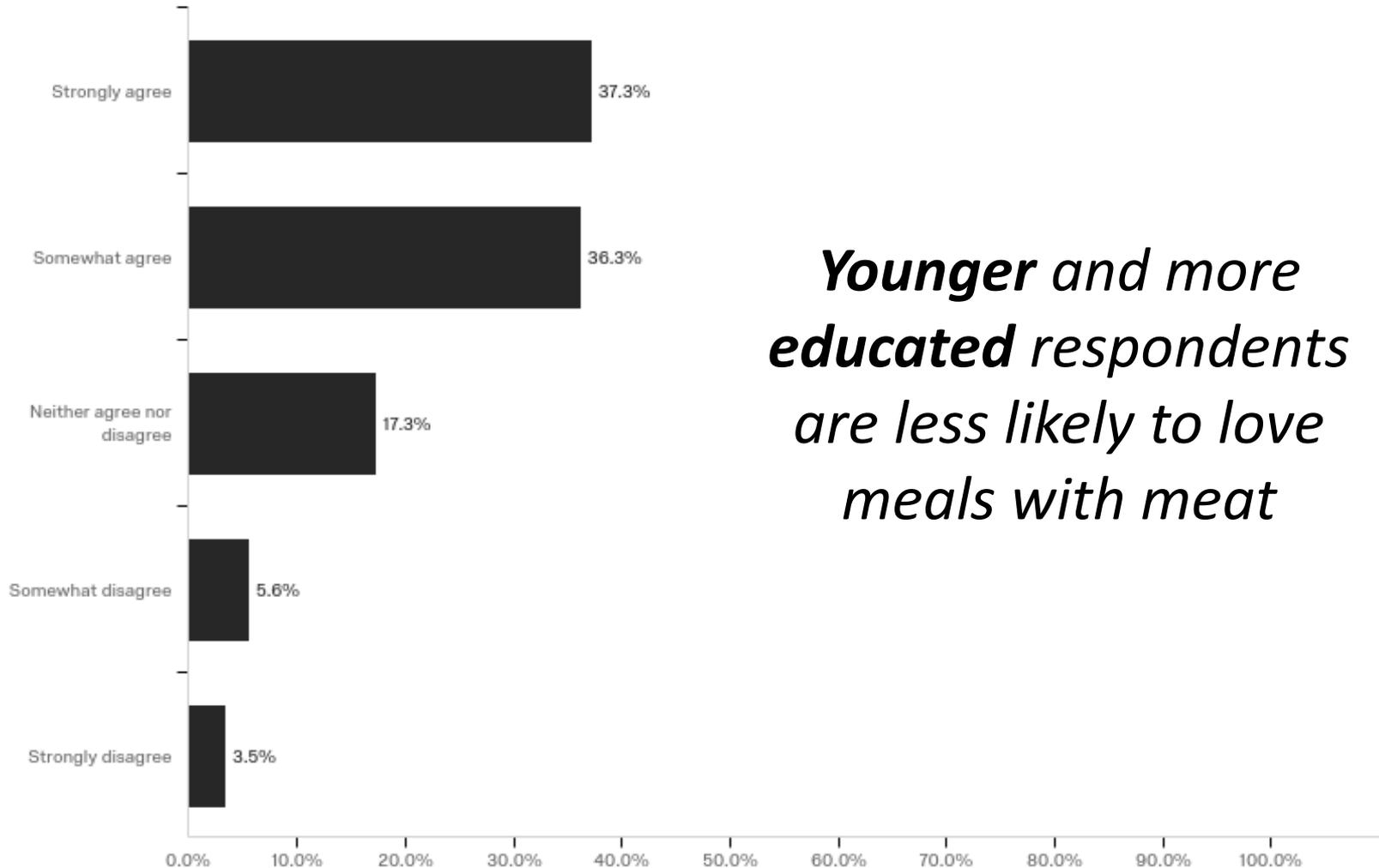
Please indicate whether you agree or disagree with the following statements:

To eat meat is one of the great pleasures in life...



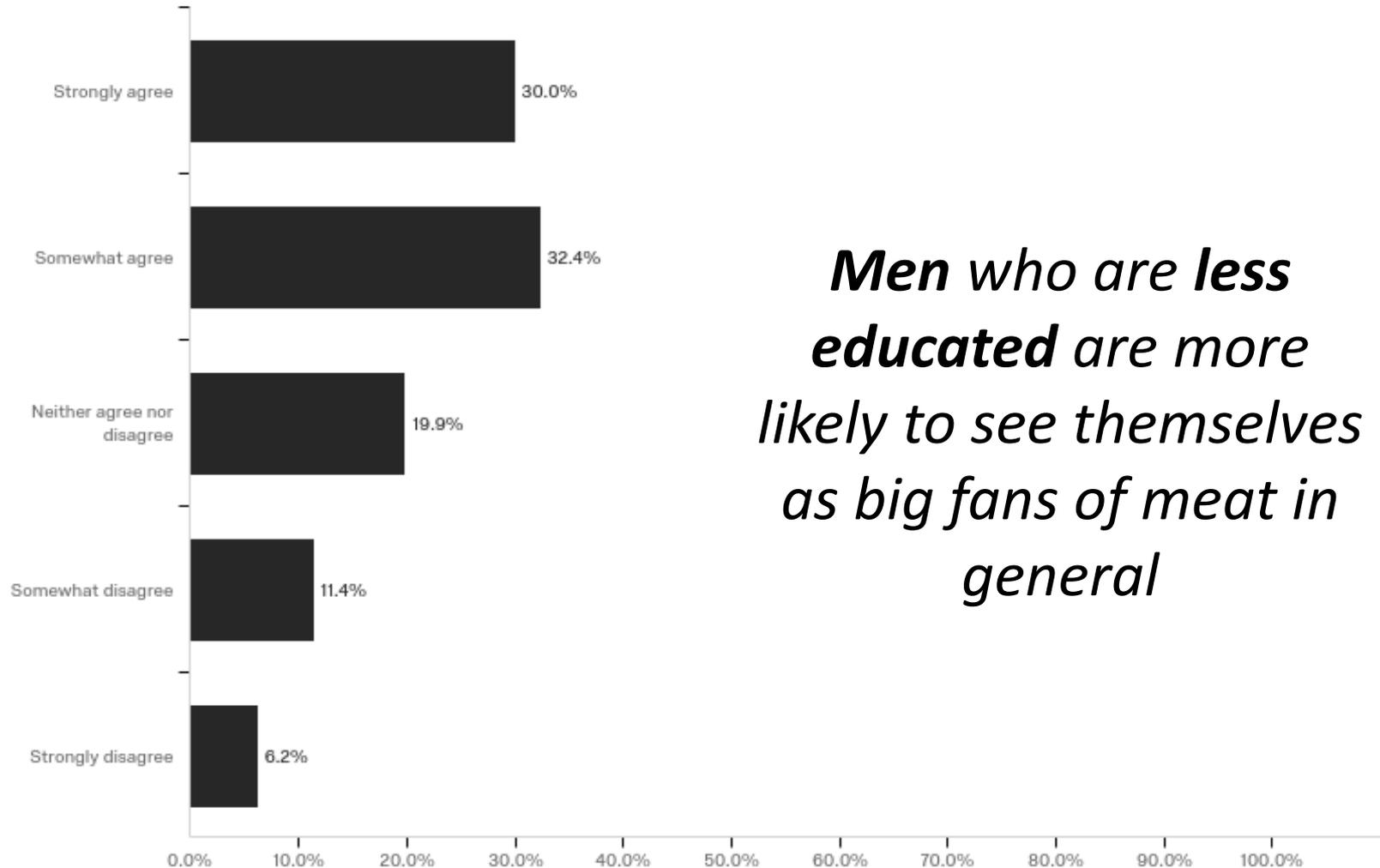
Men are more likely than women to consider eating meat as a great pleasure in life

I love meals with meat...



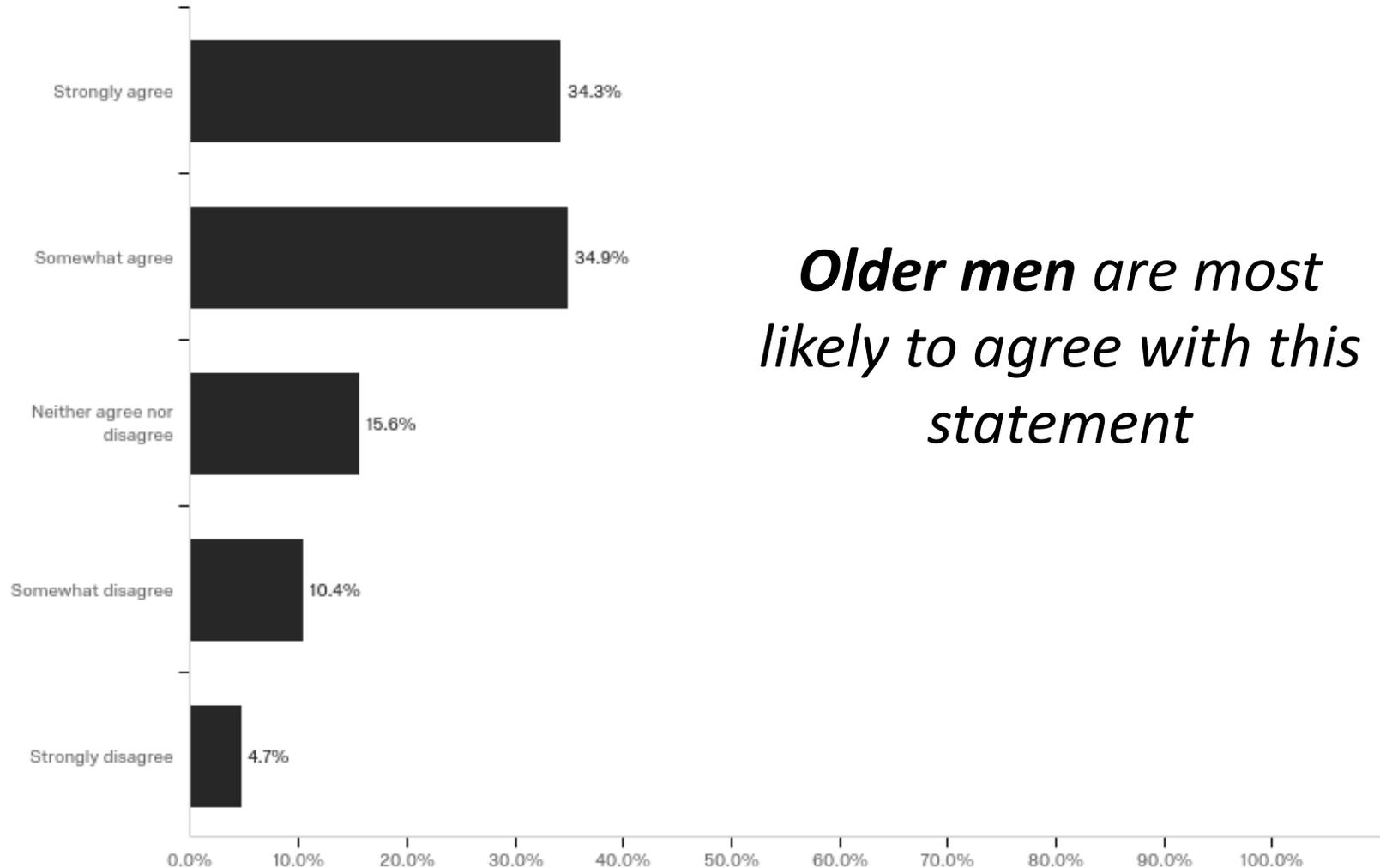
Younger and more educated respondents are less likely to love meals with meat

I am a big fan of meat in general...



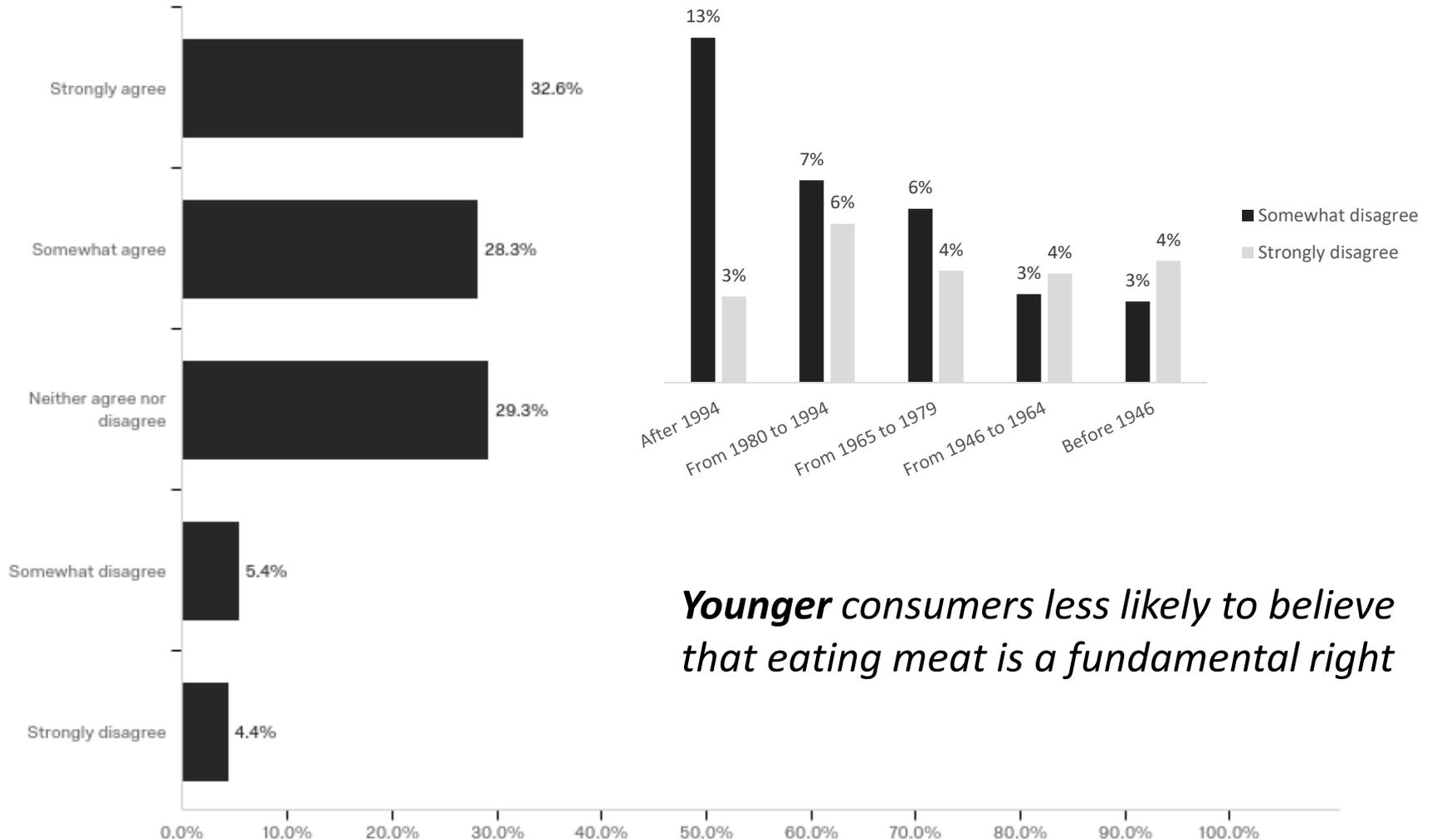
Men who are less educated are more likely to see themselves as big fans of meat in general

*Nothing compares to a good piece of steak,
chicken or pork...*



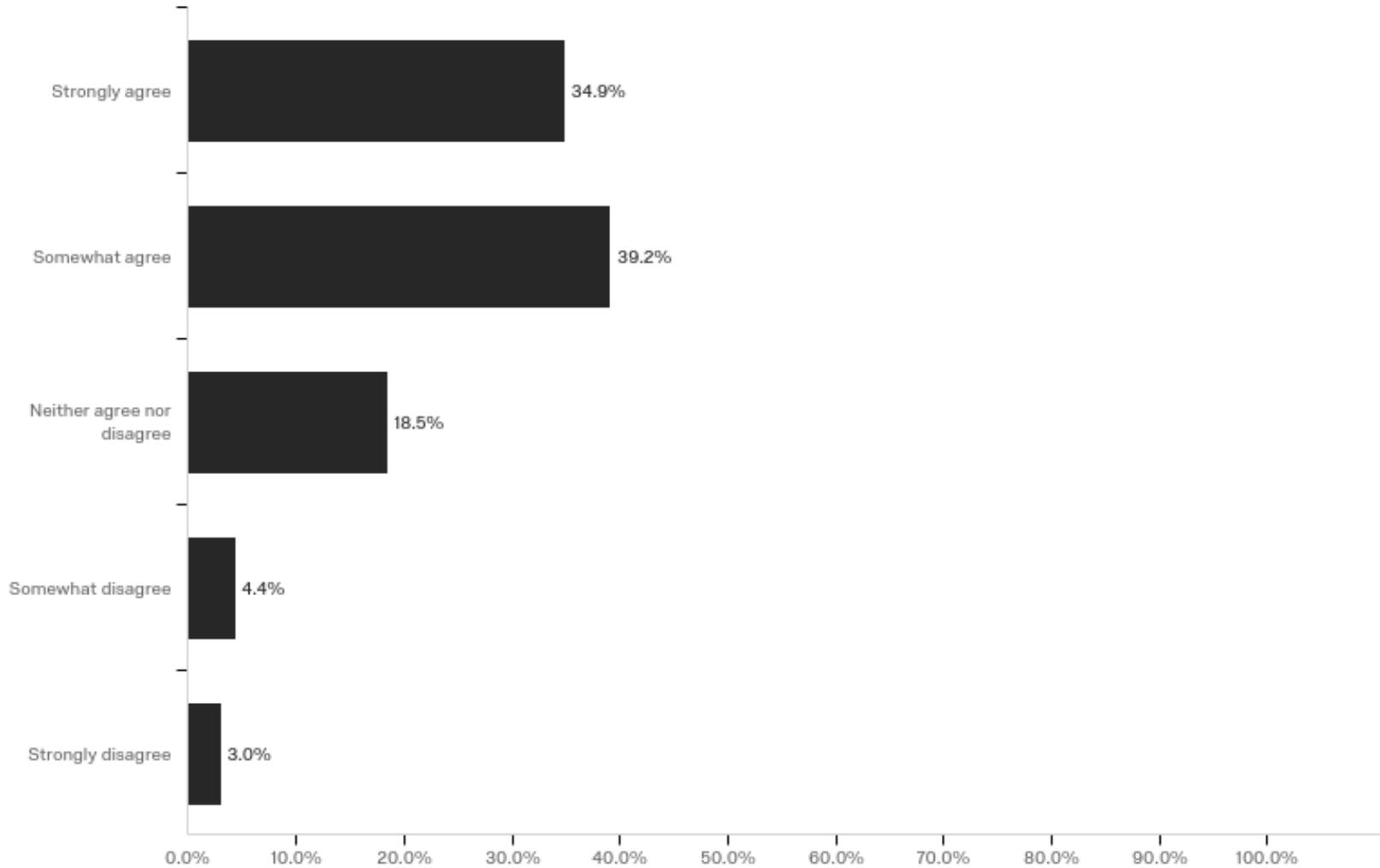
Older men are most likely to agree with this statement

To eat meat is a fundamental right of every person...

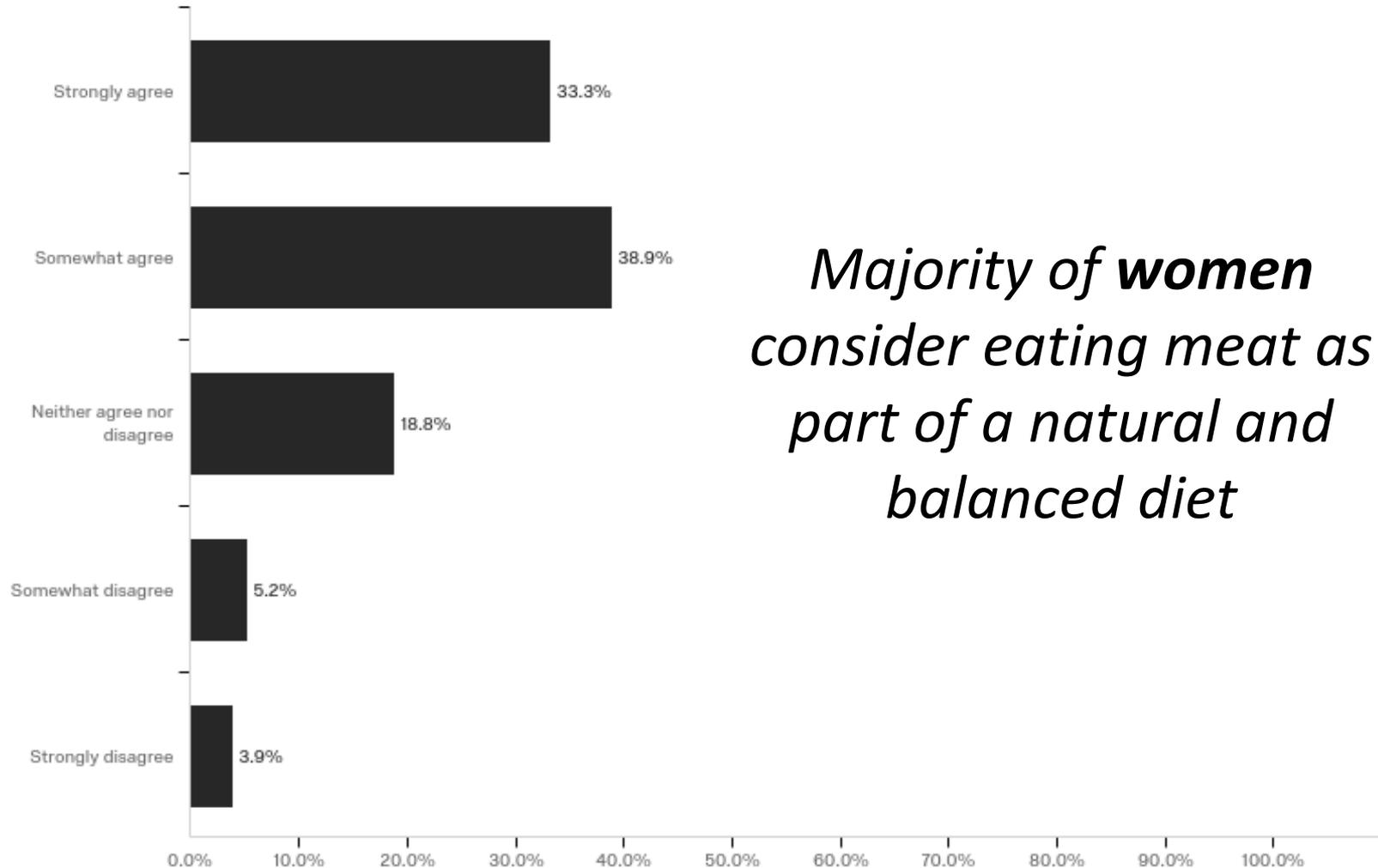


Younger consumers less likely to believe that eating meat is a fundamental right

As humans, it is natural to eat meat...

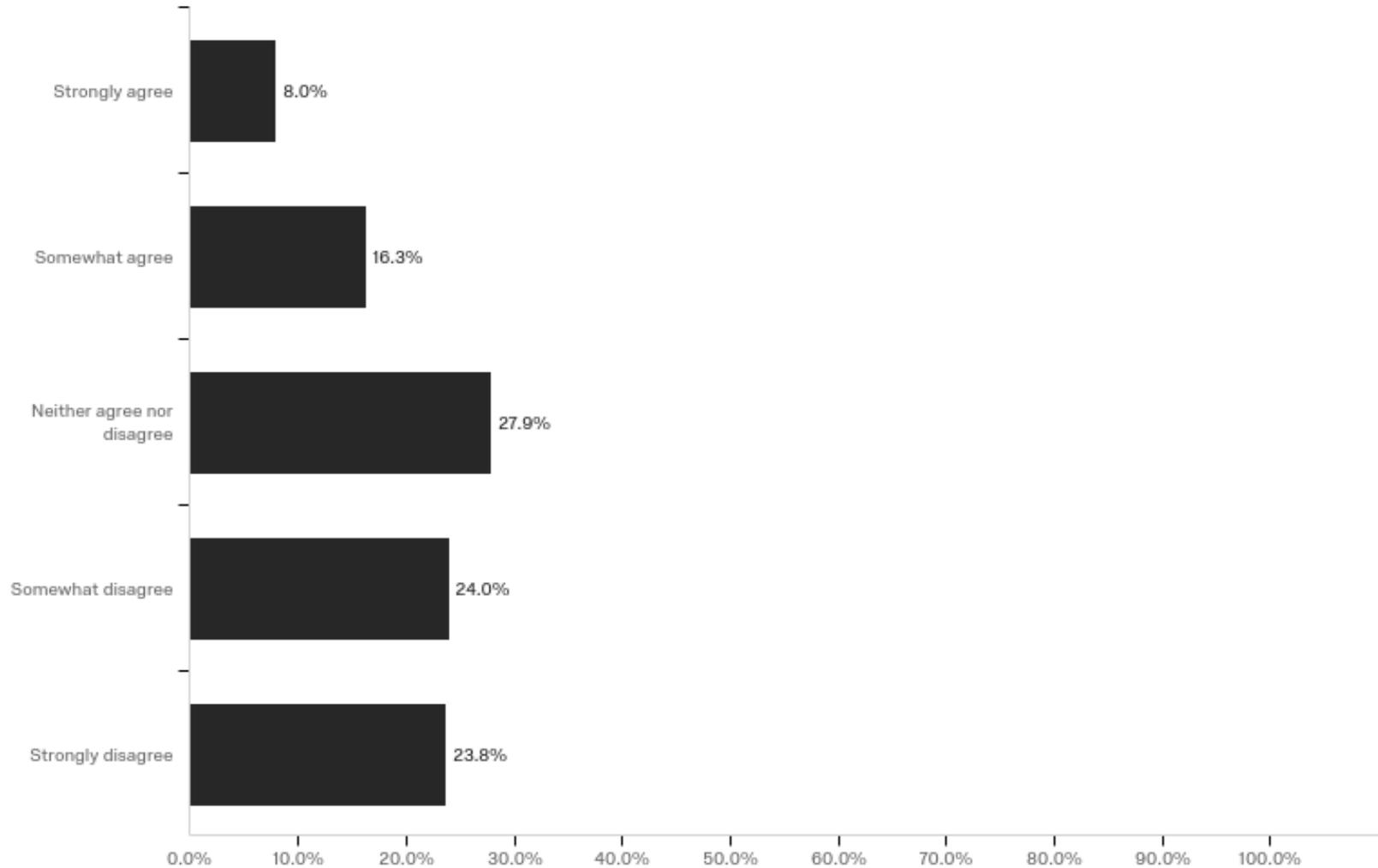


Eating meat is part of a natural and balanced diet...



*Majority of **women** consider eating meat as part of a natural and balanced diet*

If I don't eat meat, I would get sick or feel weak...

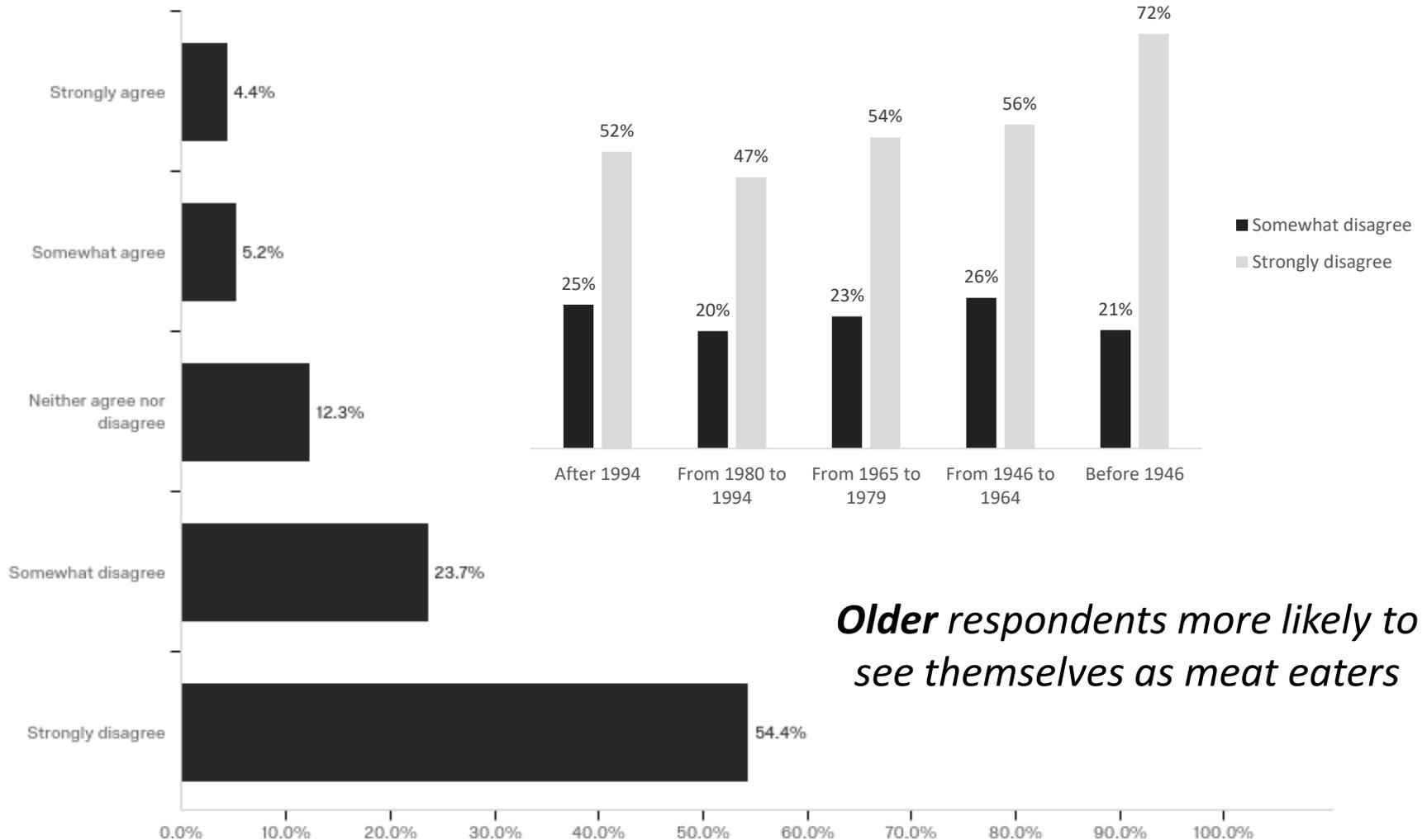




Meat Avoidance

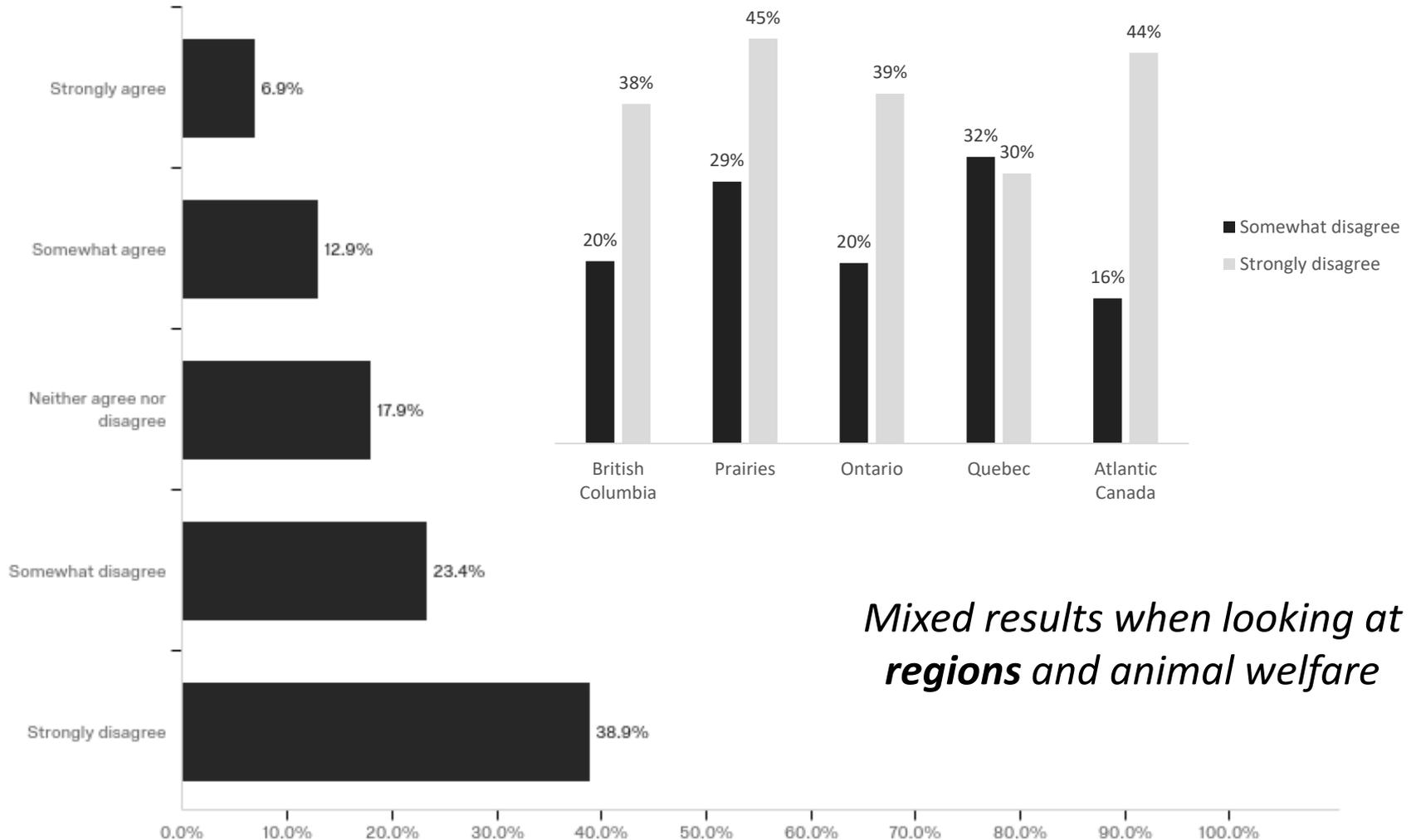
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I can't see myself eating meat...



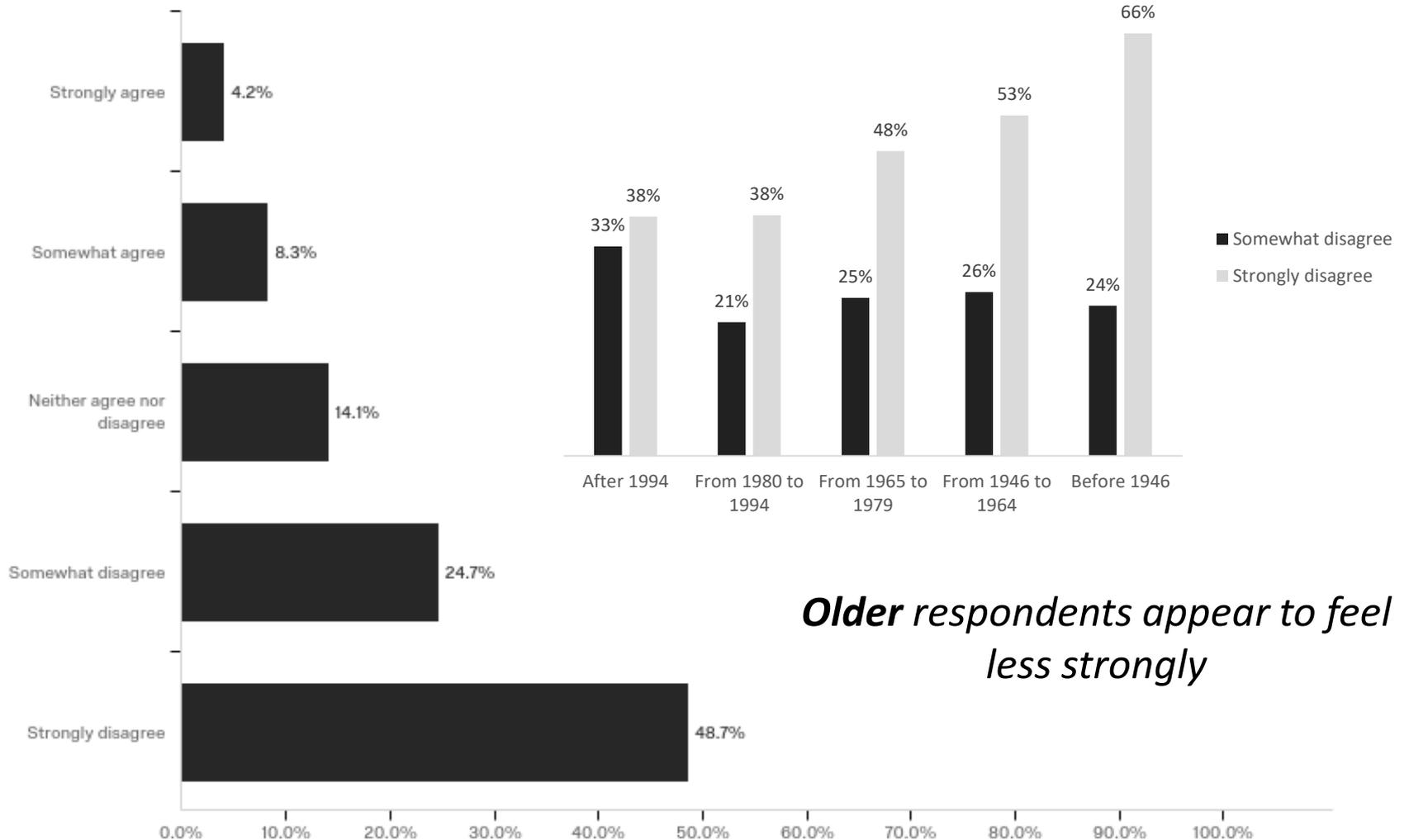
Older respondents more likely to see themselves as meat eaters

When I eat meat, I'm reminded of the deaths and suffering of animals...



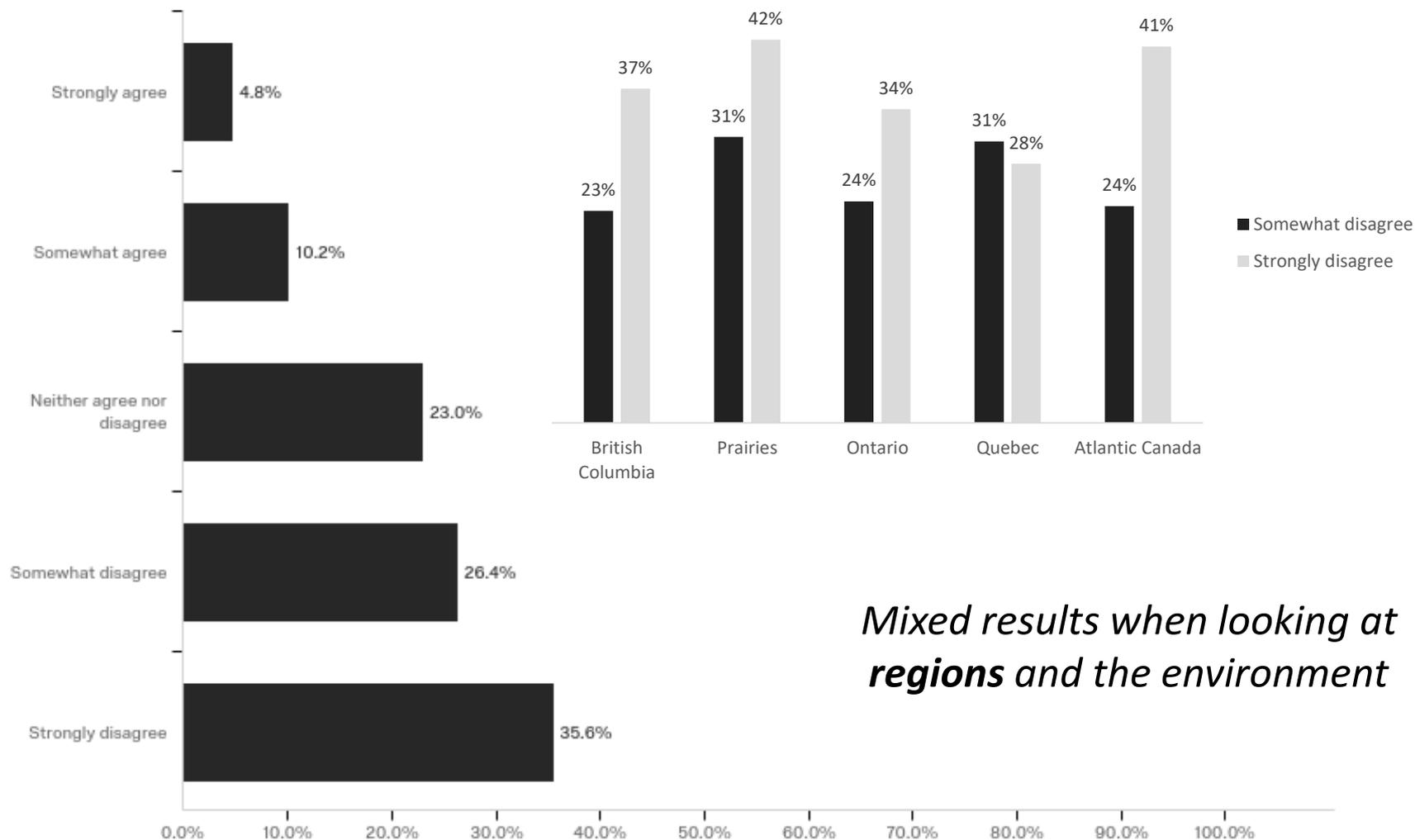
Mixed results when looking at regions and animal welfare

I feel awful when I think of eating meat...



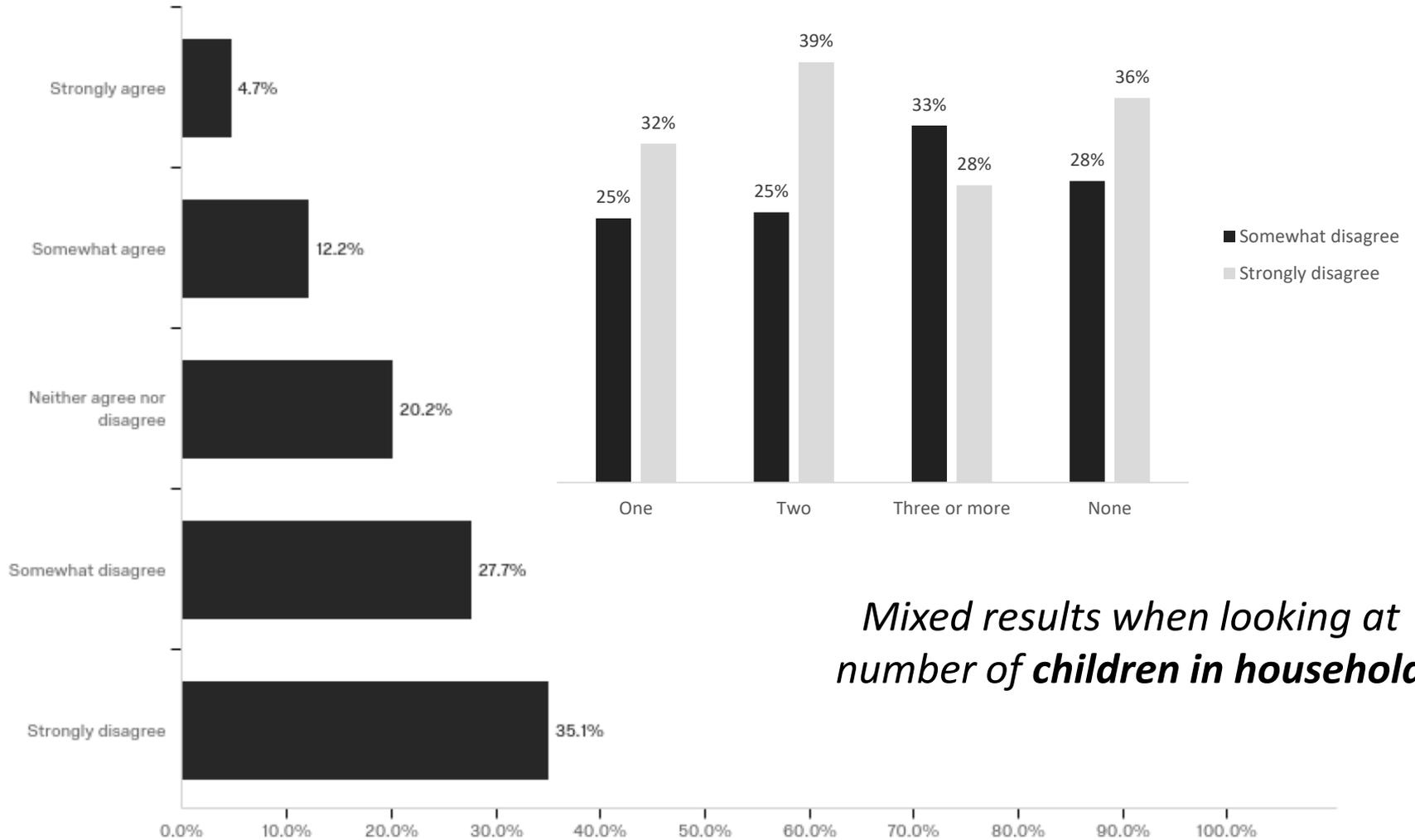
Older respondents appear to feel less strongly

To eat meat is disrespectful towards life and the environment...



Mixed results when looking at regions and the environment

Meat reminds me of food recalls and diseases...



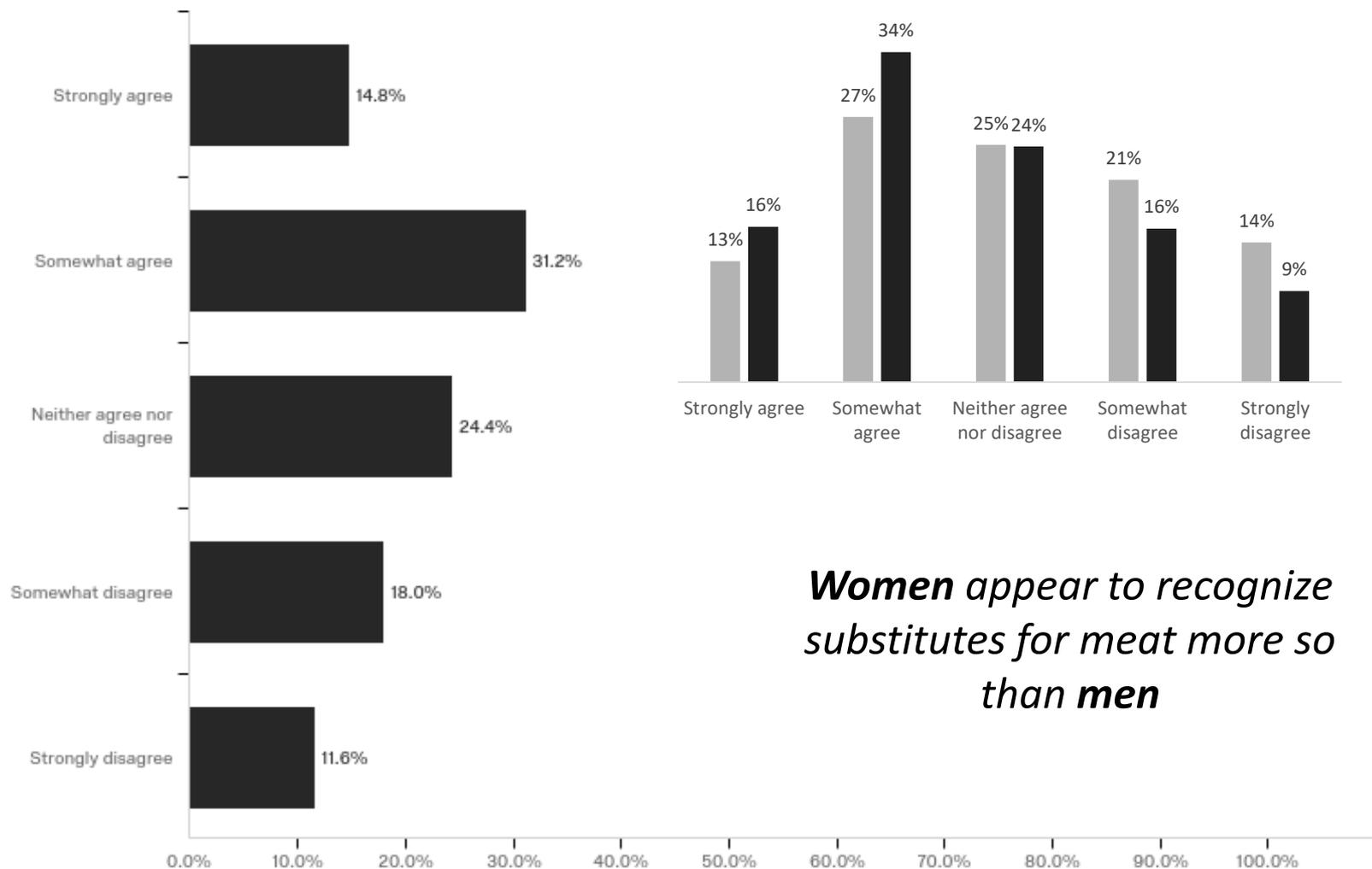
Mixed results when looking at number of children in household



Substitution

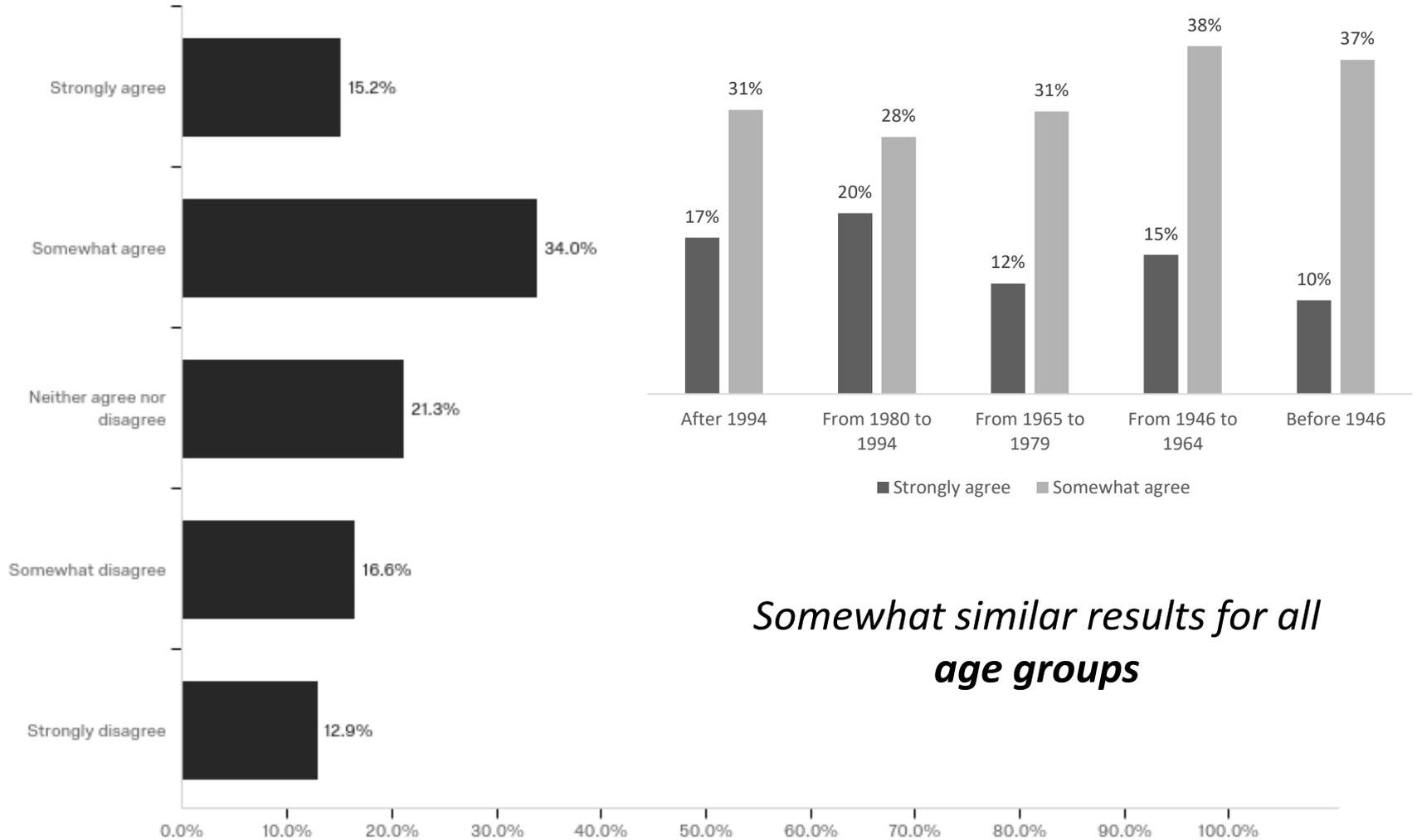
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Meat is replaceable in my diet...



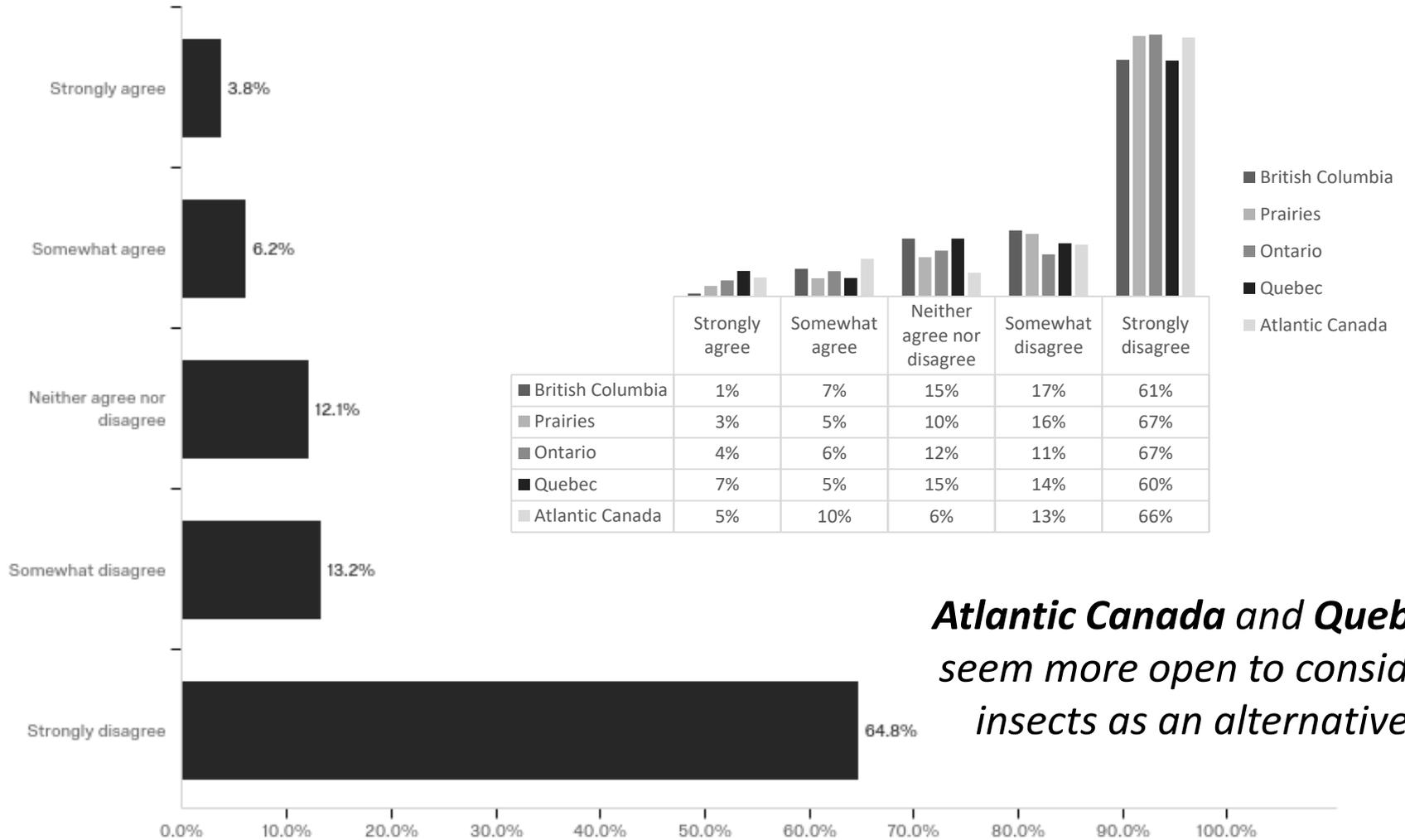
Women appear to recognize substitutes for meat more so than men

I know how to replace meat in my diet...



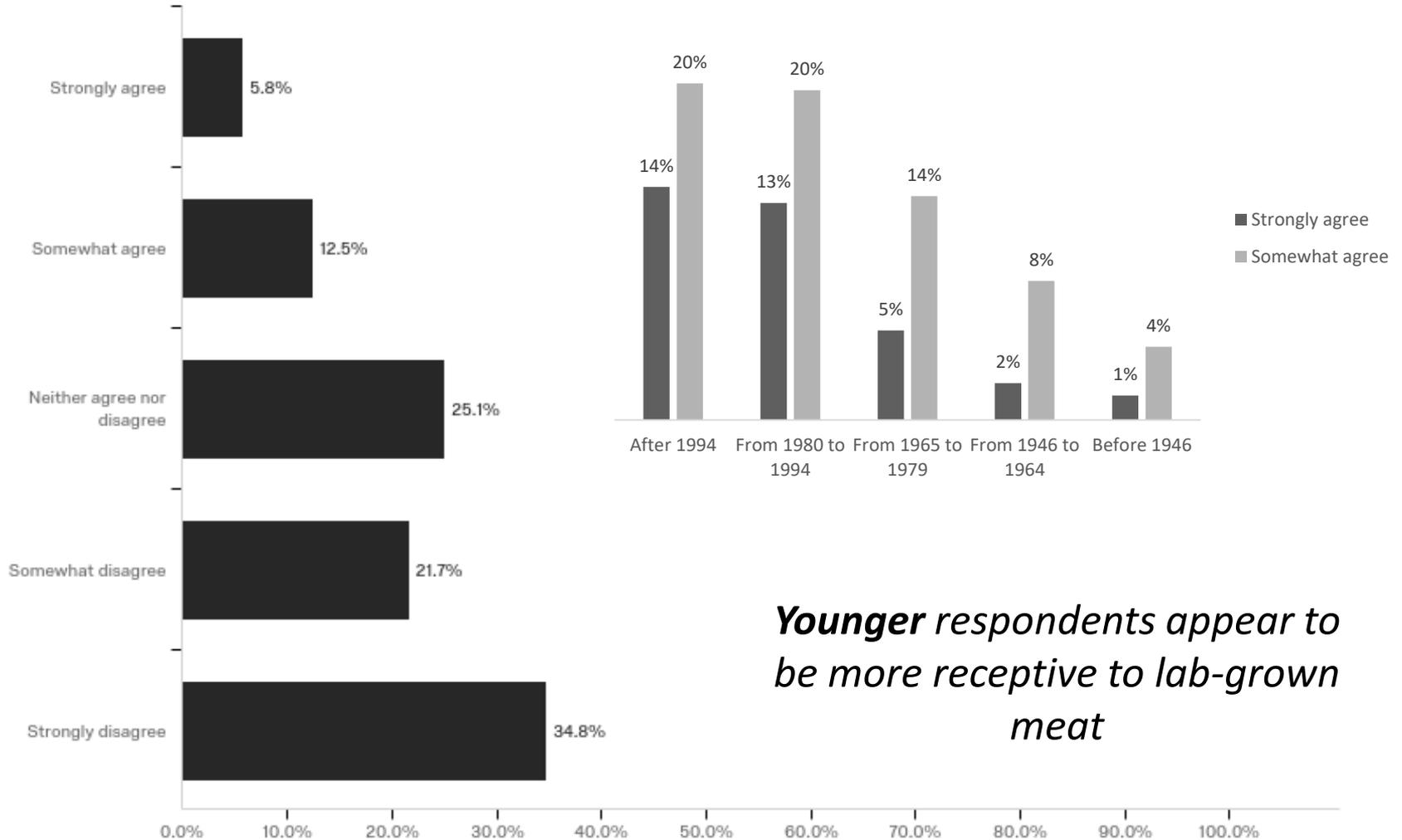
Somewhat similar results for all age groups

I consider insects/bugs as an alternative to regular meat...



Atlantic Canada and Quebec seem more open to consider insects as an alternative

I consider lab-grown meat as an alternative to regular meat...



Younger respondents appear to be more receptive to lab-grown meat

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