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-base 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**: $n=1027$. 
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.
Conceptual Framework

Figure 1
Interplay between dimensions of meat consumption preferences

- Intensity of Meat Rejection

- Pursuit of Meat Hedonism

- Plant-based Lifestyle

- Meat Attachment

- Meat Avoidance

- Meat Entitlement
Meat Consumption (General)
On average how often do you consume meat or products that include meat?

- Never: 2.28%
- Less than once a month: 2.57%
- Once or twice a month: 6.34%
- Once or twice a week: 40.10%
- Daily: 48.51%
Please chose the answer that most represents your dietary choices. As a consumer, I consider myself a...

- Vegetarian (diet free of meat, fish, and fowl flesh) - 2.1%
- Lacto-ovo vegetarian (diet free of animal flesh but eat eggs and milk products) - 1.2%
- Vegan (diet free from all animal-based products, including honey) - 1.1%
- Raw foodists (eat mainly raw fruits, vegetables, legumes, sprouts, and nuts) - 1.6%
- Flexitarian (vegetarians who occasionally eat meat and fish) - 10.2%
- Consumer with no dietary preferences - 82.5%
- Pescetarian (vegetarians who occasionally eat fish) - 1.2%
Trends: Dietary preferences

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

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

- 42% of Flexitarians are Boomers.

Reducing or Eliminating Meat from Diet (Age Group)
- After 1994: 4%
- From 1980 to 1994: 15%
- From 1965 to 1979: 13%
- From 1946 to 1964: 23%
- Before 1946: 29%

Reducing or Eliminating Meat from Diet (Region)
- British Columbia: 46%
- Prairies: 15%
- Ontario: 13%
- Quebec: 15%
- Atlantic Canada: 9%
Meat Consumption (Trends)
In the past, have you thought at some point of making any efforts to reduce your personal meat consumption?

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

- Not at all willing: 12.1%
- Somewhat unwilling: 12.1%
- Neither willing nor unwilling: 24.4%
- Somewhat willing: 39.1%
- Extremely willing: 12.2%

51.3% of Canadians willing to reduce their meat consumption
Specifically, in the next six months do you intend to reduce your meat consumption?

- I do not intend to reduce my meat consumption: 22.3%
- I probably will not reduce my meat consumption: 15.8%
- I may or may not reduce my meat consumption: 29.6%
- I probably will reduce my meat consumption: 23.7%
- Fully intend to reduce my meat consumption: 8.5%

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))

<table>
<thead>
<tr>
<th>Level of Education</th>
<th>I do not intend to reduce my meat consumption</th>
<th>I probably will not reduce my meat consumption</th>
<th>I may or may not reduce my meat consumption</th>
<th>I probably will reduce my meat consumption</th>
<th>Fully intend to reduce my meat consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Some High School</td>
<td>24%</td>
<td>26%</td>
<td>27%</td>
<td>21%</td>
<td>19%</td>
</tr>
<tr>
<td>High School Diploma or Equivalent</td>
<td>24%</td>
<td>18%</td>
<td>16%</td>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Registered Apprenticeship or Other Trades Certificate or Diploma</td>
<td>24%</td>
<td>31%</td>
<td>24%</td>
<td>32%</td>
<td>28%</td>
</tr>
<tr>
<td>College, CEGEP or Other Non-University Certificate or Diploma</td>
<td>20%</td>
<td>18%</td>
<td>30%</td>
<td>24%</td>
<td>28%</td>
</tr>
<tr>
<td>University Degree, Certificate or Diploma</td>
<td>7%</td>
<td>7%</td>
<td>3%</td>
<td>8%</td>
<td>11%</td>
</tr>
<tr>
<td>Advanced University Degree (Graduate)</td>
<td>7%</td>
<td>7%</td>
<td>3%</td>
<td>8%</td>
<td>11%</td>
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</tbody>
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Specifically, in the next six months do you intend to reduce your meat consumption?

<table>
<thead>
<tr>
<th>Income Range</th>
<th>I do not intend to reduce my meat consumption</th>
<th>I probably will not reduce my meat consumption</th>
<th>I may or may not reduce my meat consumption</th>
<th>I probably will reduce my meat consumption</th>
<th>Fully intend to reduce my meat consumption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $34,999</td>
<td>22%</td>
<td>15%</td>
<td>31%</td>
<td>24%</td>
<td>8%</td>
</tr>
<tr>
<td>Between $35,000 and $49,999</td>
<td>23%</td>
<td>21%</td>
<td>21%</td>
<td>28%</td>
<td>7%</td>
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<tr>
<td>Between $50,000 and $74,999</td>
<td>20%</td>
<td>17%</td>
<td>32%</td>
<td>25%</td>
<td>6%</td>
</tr>
<tr>
<td>Between $75,000 and $99,999</td>
<td>22%</td>
<td>13%</td>
<td>30%</td>
<td>21%</td>
<td>14%</td>
</tr>
<tr>
<td>Between $100,000 and $149,999</td>
<td>24%</td>
<td>15%</td>
<td>25%</td>
<td>25%</td>
<td>12%</td>
</tr>
<tr>
<td>$150,000 +</td>
<td>26%</td>
<td>11%</td>
<td>34%</td>
<td>24%</td>
<td>5%</td>
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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.
Meat Consumption
(Factors)
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)
Please indicate whether you agree or disagree with the following statements:

*To eat meat is one of the great pleasures in life…*

- **Strongly agree**: 22.5%
- **Somewhat agree**: 31.4%
- **Neither agree nor disagree**: 28.0%
- **Somewhat disagree**: 10.7%
- **Strongly disagree**: 7.3%

**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
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
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...

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<tbody>
<tr>
<td>Strongly agree</td>
<td>17%</td>
<td>20%</td>
<td>17%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Somewhat agree</td>
<td>31%</td>
<td>28%</td>
<td>31%</td>
<td>38%</td>
<td>37%</td>
</tr>
<tr>
<td>Neither agree nor disagree</td>
<td>12%</td>
<td>15%</td>
<td>10%</td>
<td>10%</td>
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<tr>
<td>Somewhat disagree</td>
<td>36%</td>
<td>20%</td>
<td>31%</td>
<td>15%</td>
<td>10%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>36%</td>
<td>20%</td>
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<td>37%</td>
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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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