

GAIA

Voice of the Voiceless

PERCEPTION OF BELGIAN PEOPLE REGARDING CELL BASED MEAT

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GAME CHANGERS





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MAIN RESULTS

- **ATTITUDE TOWARDS MEAT CONSUMPTION**
- **PERCEPTION REGARDING CELL BASED MEAT**
- **DRIVERS & BARRIERS CELL BASED MEAT**

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GENERAL CONCLUSIONS

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RESEARCH METHODOLOGY









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BACKGROUND AND OBJECTIVES

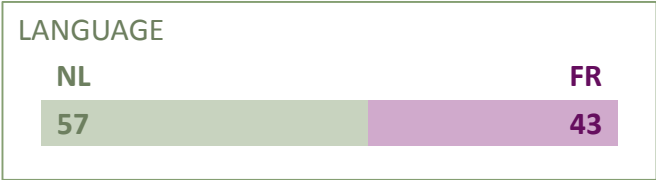
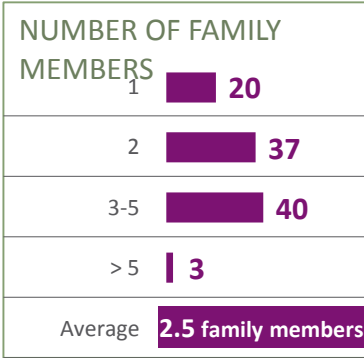
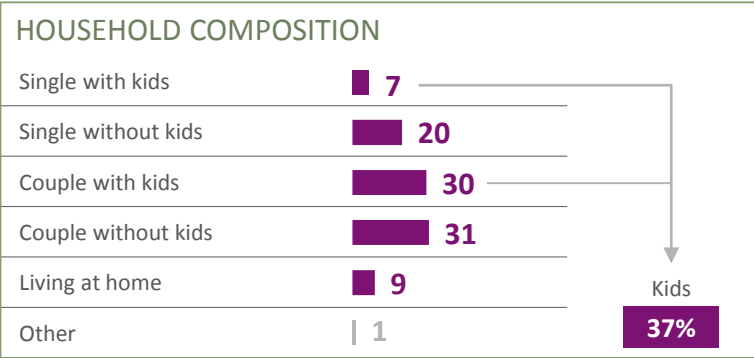
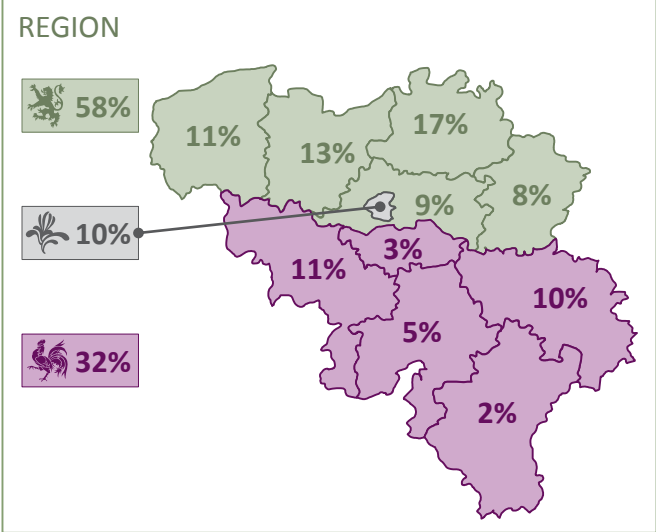
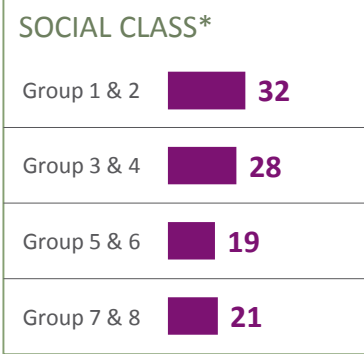
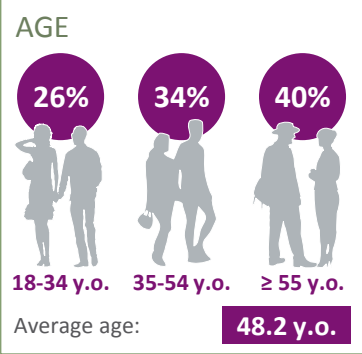
- The **market for meat substitutes** has changed substantially over the last years, with a **new trend** of animal meat produced from stem cells instead of living animals. This new type of meat production distinguishes itself from plant based meat substitutes because it allows to eat real meat without having to slaughter animals.
- Even though the technology is already ready to use, the concept has not been commercialized yet. As an influential animal rights organization, GAIA sees an important **opportunity** to anticipate this.
- The **objectives** for this research are twofold:
 - Mapping the **perception** of Belgian people towards cell based meat
 - Identify possible **drivers and barriers** for the consumption of cell based meat

Research methodology

SAMPLE DESCRIPTION	SAMPLE SIZE	QUOTA	AVERAGE INTERVIEW DURATION	DATA COLLECTION METHOD	FIELDWORK PERIOD
 <p>BELGIAN POPULATION AGED 18 OR MORE</p>	 <p>n=1001</p>	 <ul style="list-style-type: none">• GENDER• AGE• REGION	 <p>10 MINUTES</p>	 <p>ONLINE (VIA PANEL)</p>	 <p>FROM: 28/01/2019 TO: 31/01/2019</p>

The sample is representative for the Belgian population with regards to gender, age and region.

Sociodemographic profile of the sample



Base: Total sample (n=1001) / *Excluding "Not allocated" (n=995)
 Question: Gender | Age | Social class | Region | Province | SD6. Family situation | SD5. Number of people in the household | SD1. Language



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MOST IMPORTANT RESULTS



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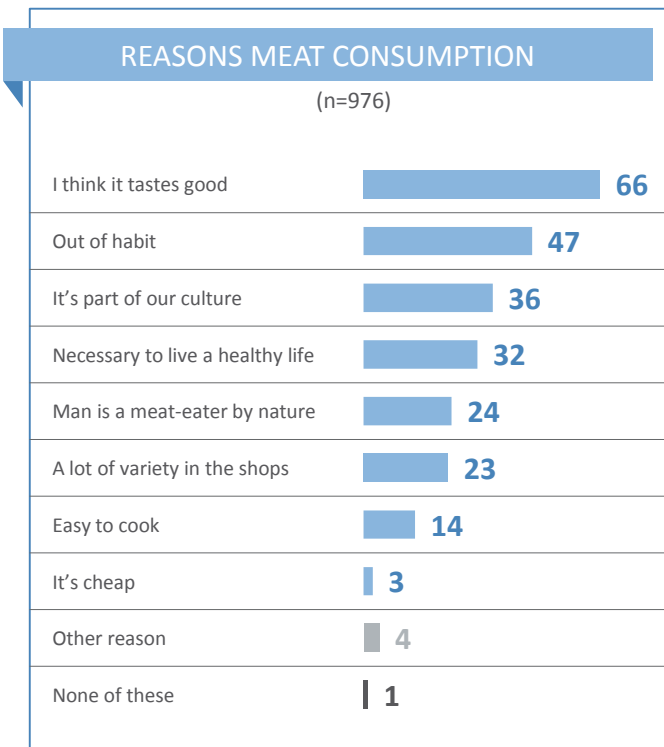
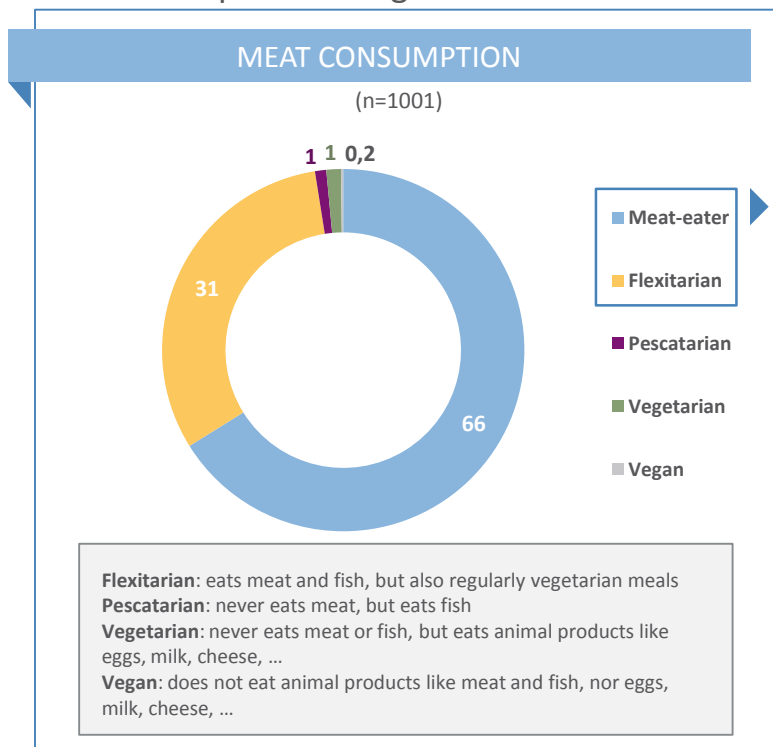




ATTITUDE TOWARDS MEAT CONSUMPTION

A third of the respondents consider themselves to be flexitarians and regularly eat vegetarian meals, next to meat and fish. Meat is mainly eaten for its taste and out of habit.

Meat consumption in Belgium



For meat-eaters as well as for flexitarians, the **taste** is the most important reason for meat consumption.

72% of **men** consider themselves to be real meat-eaters (versus 61% of women). 77% of them eat meat because they think it tastes **good**.

Apart from men, Belgians **older than 55** are also more often meat-eaters (70% meat-eaters versus 64% younger than 55).
Meat-eaters also more often live in **Wallonia** (70% versus 64% in Flanders)

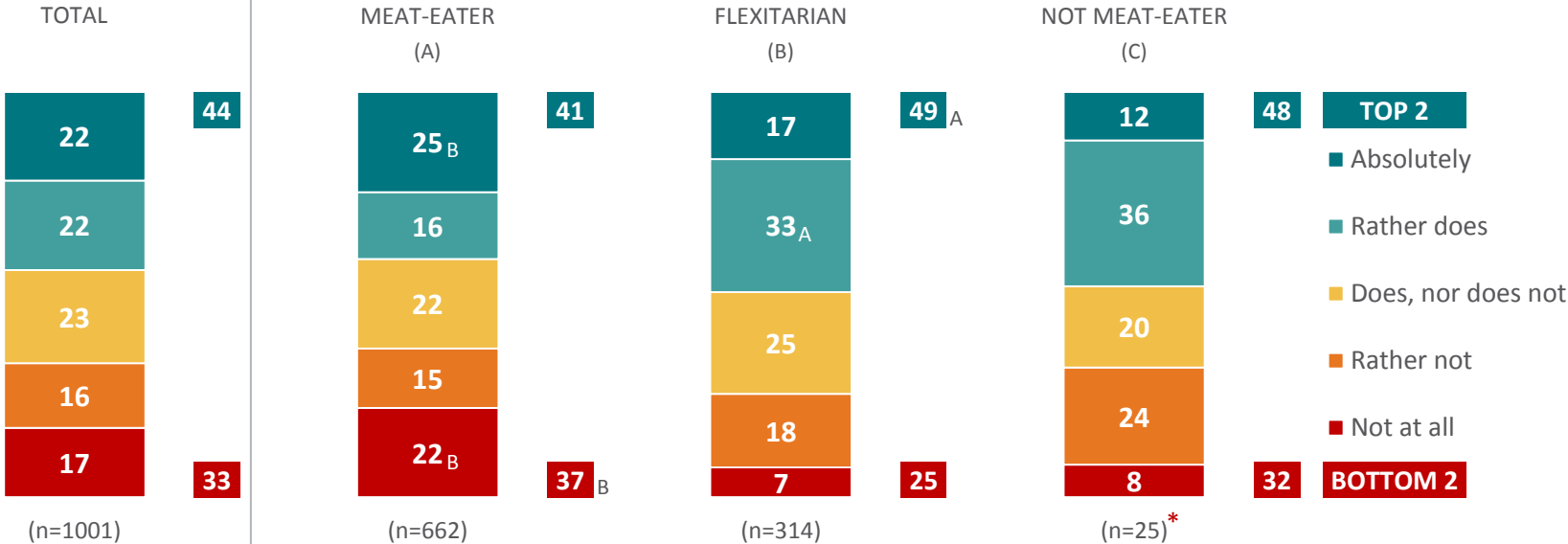
The **lowest social classes** are more often meat-eaters.

Base: Total sample (n=1001)
Question: A1. Meat consumption | A2. Reasons meat consumption

The opinions about the current offer of meat substitutes are rather divided. Flexitarians are more satisfied about the offer of meat substitutes than meat-eaters.

Current offer of meat substitutes meets my needs

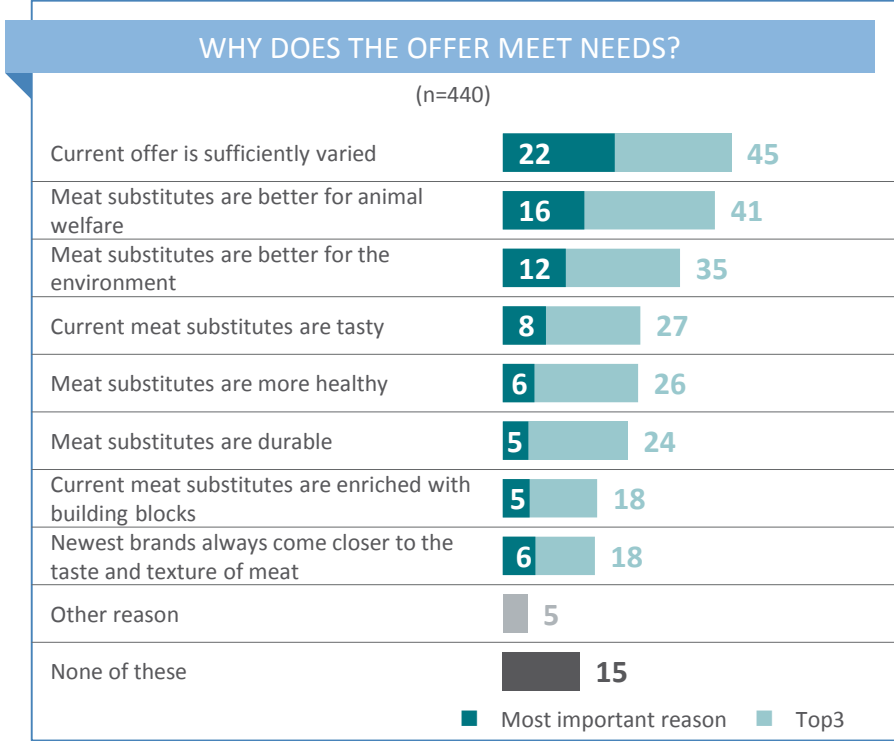
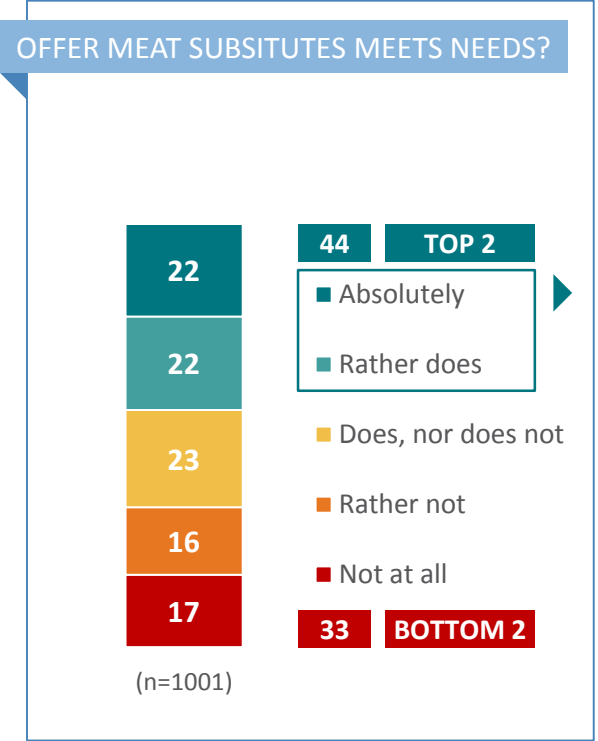
OFFER MEAT SUBSTITUTES MEETS NEEDS



Base: Total sample (n=1001)
 Question: A3. Offer meat substitutes meets needs
 ABCD: 95% significance level
 * Warning: small sample size

The variety and social aspects (animal welfare, environmental awareness) are the most important positive aspects of the current offer of meat substitutes.

Why does the current offer of meat substitutes meet your needs?

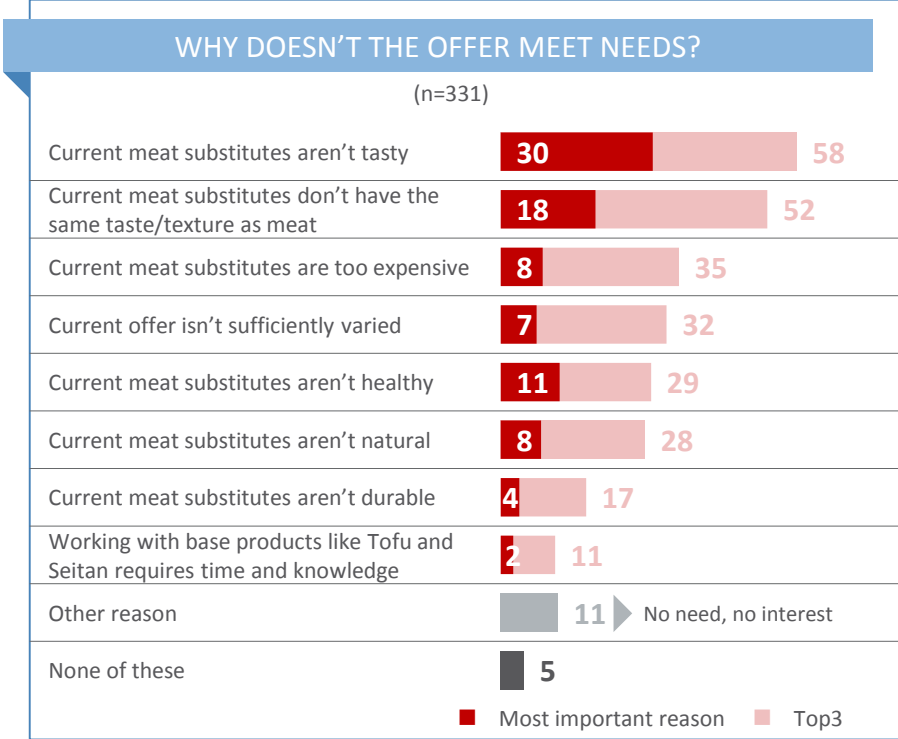
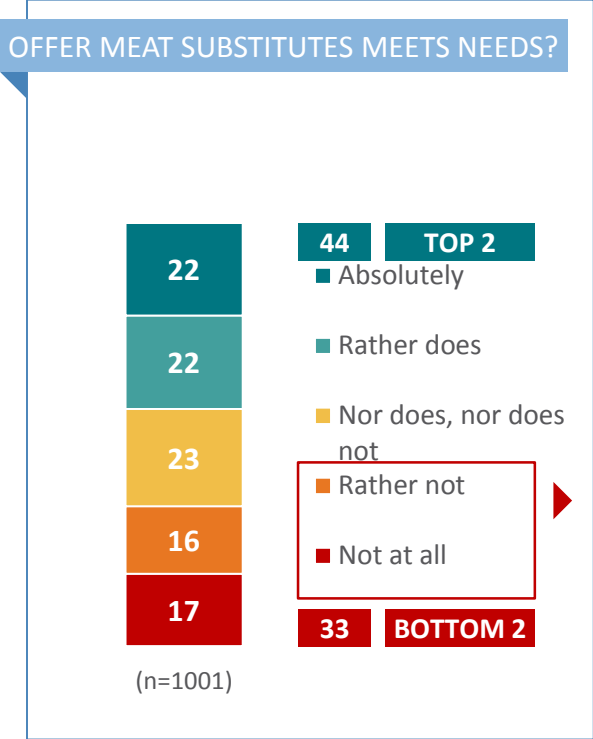


Especially for flexitarians, animal welfare and environment are important (respectively 55% and 46%).

Base: Total sample (n=1001)
 Question: A3. Offer meat substitutes meets needs | A5. Why does the offer of meat substitutes meet needs

When meat substitutes do not meet the needs, it is due to the taste and the texture which are different from those of meat.

Why doesn't the current offer of meat substitutes meet your needs?



Especially **meat-eaters** attach importance to the **taste and texture of meat** (59% versus 34% for the flexitarians).

Apart from the taste (53%), the **healthy** aspect of the meat substitutes more often plays a role for **flexitarians** than for meat-eaters (43% versus 25%).

Base: Total sample (n=1001)
 Question: A3. Offer meat substitutes meets needs | A4. Why doesn't the offer of meat substitutes meet needs



PERCEPTION REGARDING CELL BASED MEAT

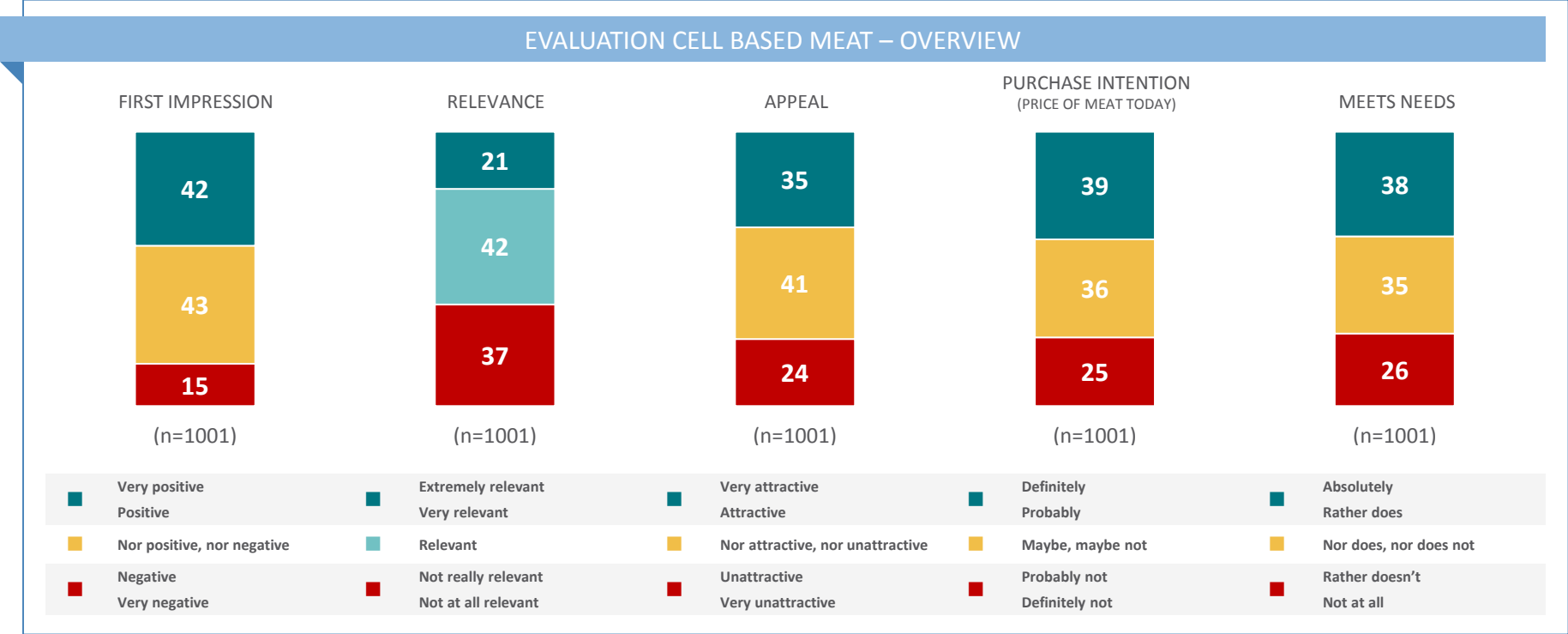
Presented concept

CONCEPT: ENGLISH TRANSLATION

Scientists are currently working on a way to produce meat by using animal cells instead of living animals. This new method to produce meat will probably be available to consumers in the next 5 to 10 years. Beware, this type of meat is actual animal meat and may not be confused with plant based meat substitutes. This meat is identical to animal meat (taste, nutritional value, ...) without having to kill animals for it.

About 4 out of 10 Belgians have a positive attitude towards the concept of cell based meat. 4 out of 10 also have a neutral first impression of the concept, while only 15% has a negative attitude.

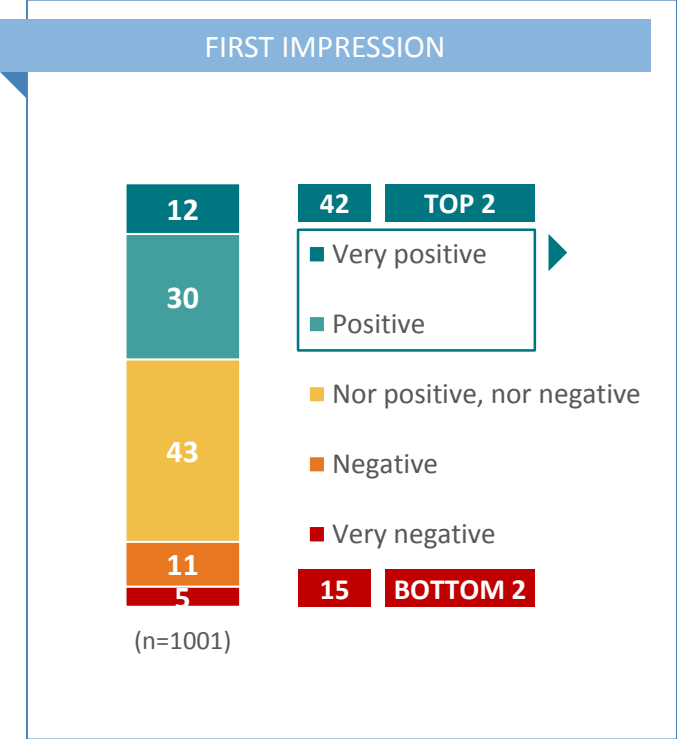
Evaluation cell based meat on different KPIs



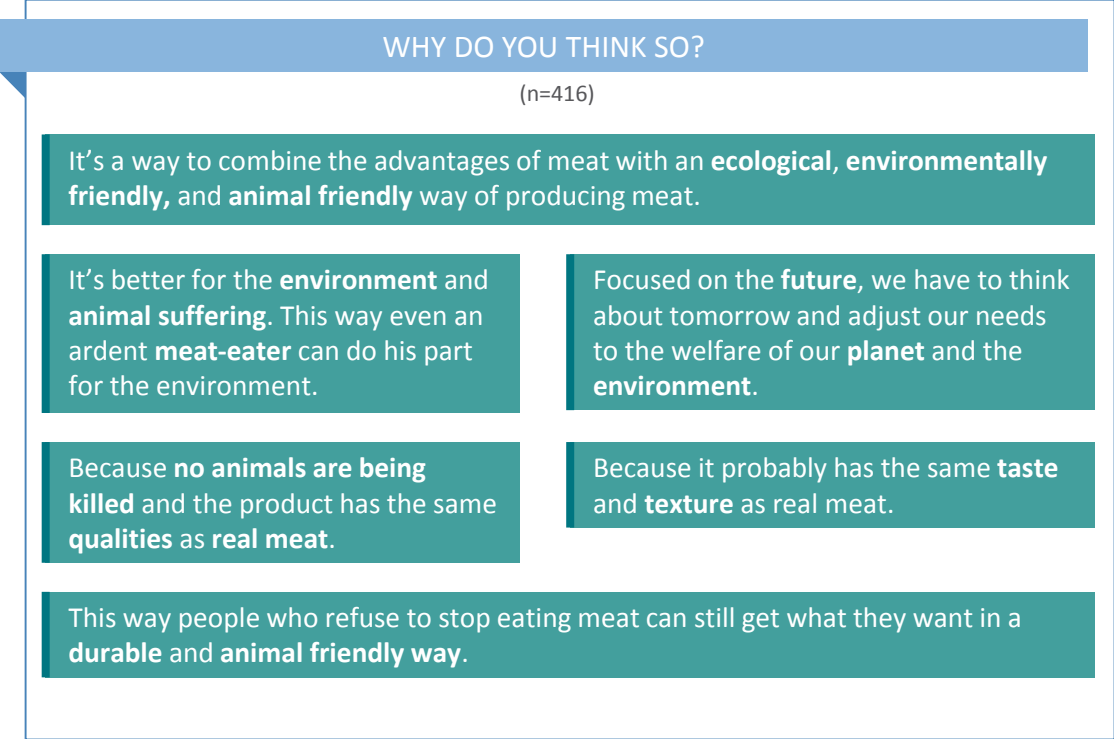
Base: Total sample (n=1001)
 Question: P1. First impression | P3. Relevance | P4. Appeal | P5. Purchase intention at the price of meat today | P6. Cell based meat meets needs

Just like the existing meat substitutes, the concept of cell based meat is often associated with animal welfare and respect for the environment. Furthermore, the taste and texture of real meat are seen as an advantage.

First impressions: positive verbatims

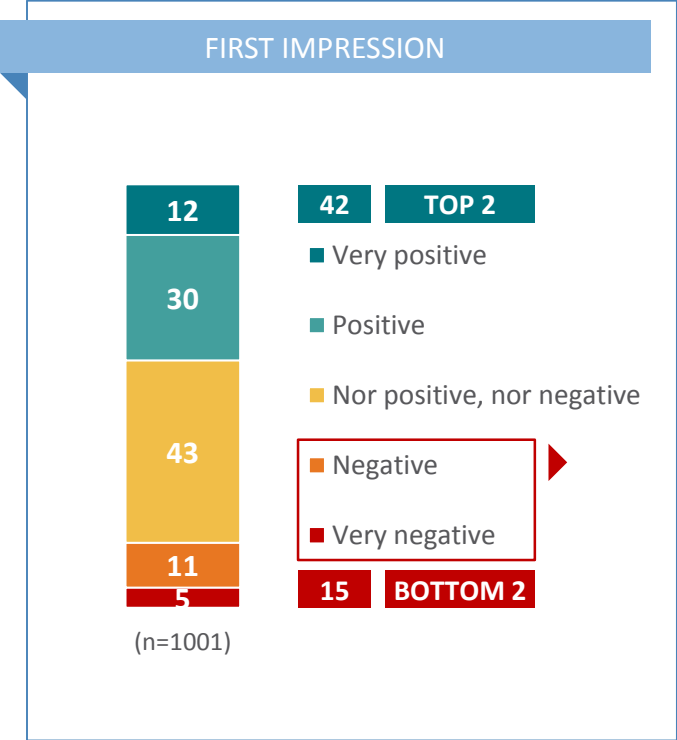


Base: Total sample (n=1001)
 Question: P1. First impression | P2b. Why do you think so?



The most important negative first impressions deal with the impact on our health and the artificial context of the production of cell based meat.

First impressions: negative verbatims



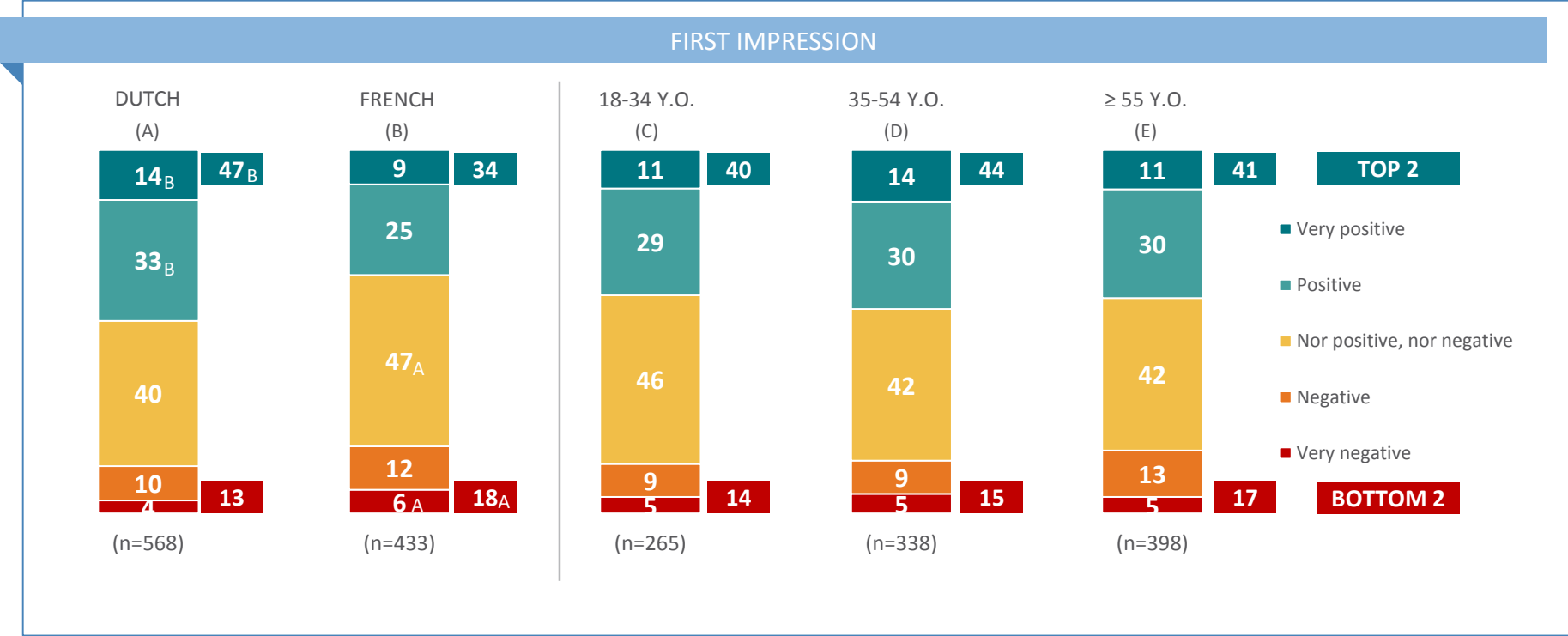
WHY DO YOU THINK SO? (n=154)

- It will **never be the same** as real meat, even though they say it is.
- I find the idea a little **creepy**. And furthermore I can vary my dishes enough with the current offer of meat/vegetarian options.
- It will be full of **chemicals**. It **isn't natural**, so there will be complications on the short or the long term.
- Is all of this **healthy**?
- It can't be guaranteed that it's **healthy** or which effects this will have on the body after a longer period of time. You don't know where the meat is coming from and what is in it, while for meat from animals you know exactly from which animal it originates and where the animal came from.
- Too **artificial**, who can guarantee that this won't have negative consequences.

Base: Total sample (n=1001)
 Question: P1. First impression | P2a. Why do you think so?

The first impressions are equally positive across different age groups. Dutch speaking respondents are more positive than French speaking respondents.

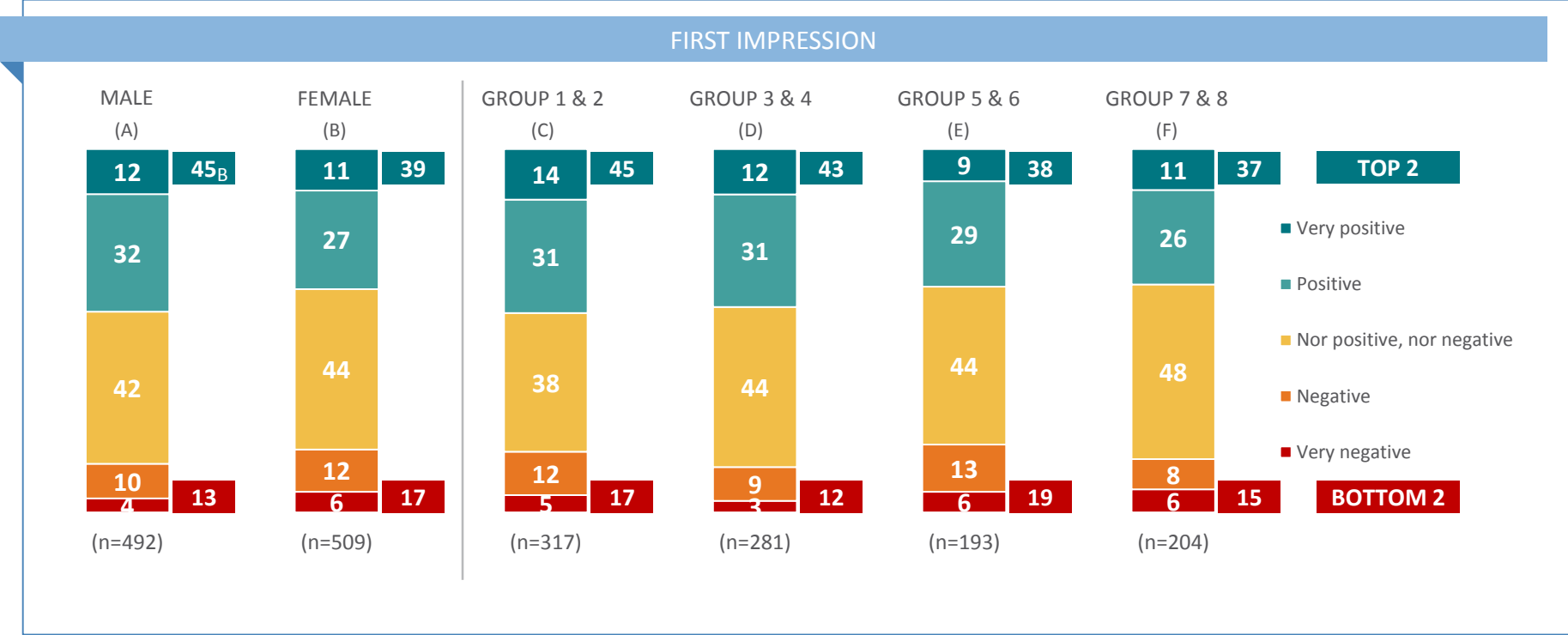
First impression – according to language and age



Base: Total sample (n=1001)
 Question: P1. First impression
 ABCD: 95% significance level

No differences in first impression across the different social classes. In general, men have a more positive first impression than women.

First impression – according to gender and social class



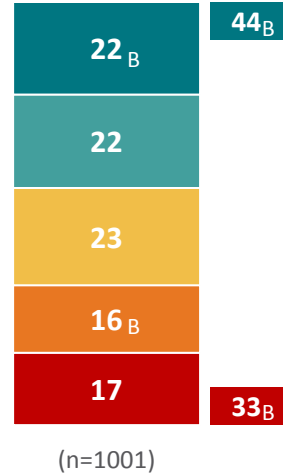
Base: Total sample (n=1001)
 Question: P1. First impression
 ABCD: 95% significance level

The concept of cell based meat meets the needs in about the same degree as the current offer of meat substitutes. For one third of the Belgian population, for whom the current offer of meat substitutes doesn't meet their needs, the new concept can be an answer.

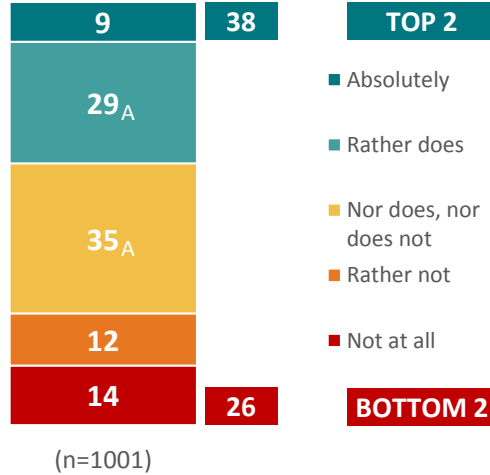
Cell based meat meets my needs as an alternative to traditional meat

MEAT SUBSTITUTES/CELL BASED MEAT MEETS MY NEEDS

MEAT SUBSTITUTES (A)



CELL BASED MEAT (B)



- Absolutely
- Rather does
- Nor does, nor does not
- Rather not
- Not at all

BOTTOM 2

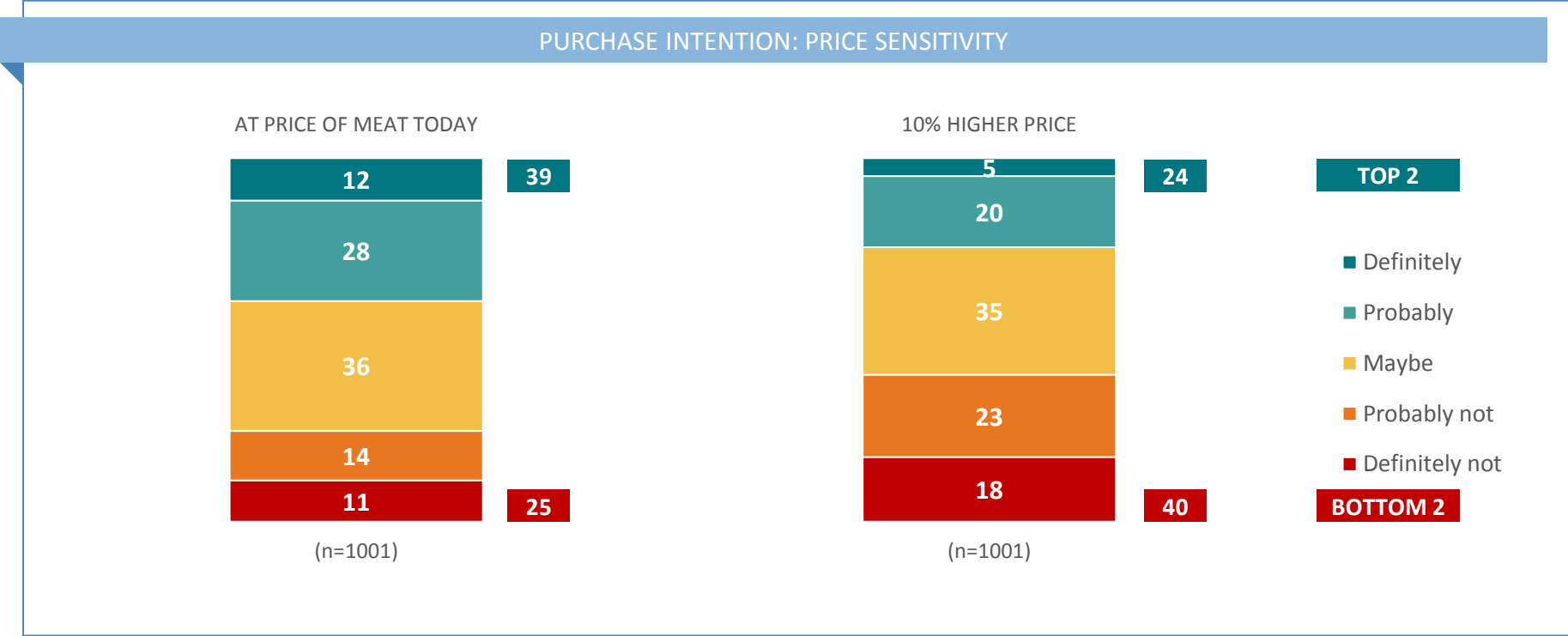
Cell based meat meets my needs

	Current offer meat substitutes meets my needs		
	Absolutely/ rather does (n=440) (A)	Does, nor does not (n=230) (B)	Not at all/rather not (n=331) (C)
Absolutely/rather does	48 _{BC}	30	31
Does, nor does not	32	46 _{AC}	33
Not at all/ rather not	20	24	36 _{AB}

Base: Total sample (n=1001)
 Question: P6. Cell based meat meets needs | A3. Offer meat substitutes meets needs
 ABCD: 95% significance level

24% of the Belgian population is even willing to pay up to 10% more for cell based meat than for meat of slaughtered animals.

Purchase intention: price sensitivity



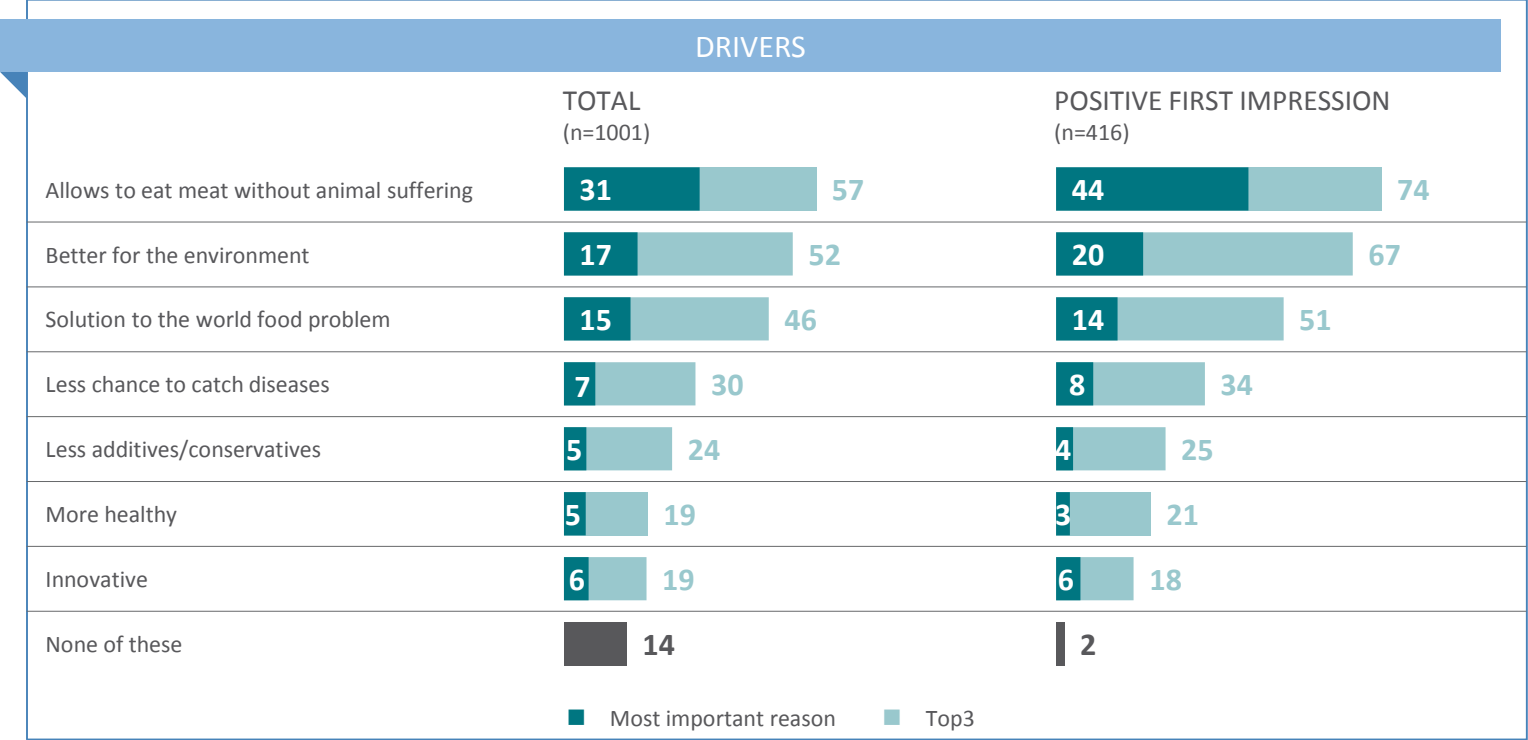
Base: Total sample (n=1001)
Question: P5. Purchase intention at price of meat today | P10. Purchase intention at higher price than slaughtered meat



DRIVERS & BARRIERS FOR THE CONSUMPTION OF CELL BASED MEAT

The appeal of the concept is particularly related to the fact that it allows to eat “real” meat without causing animal suffering, followed by the environmental aspect.

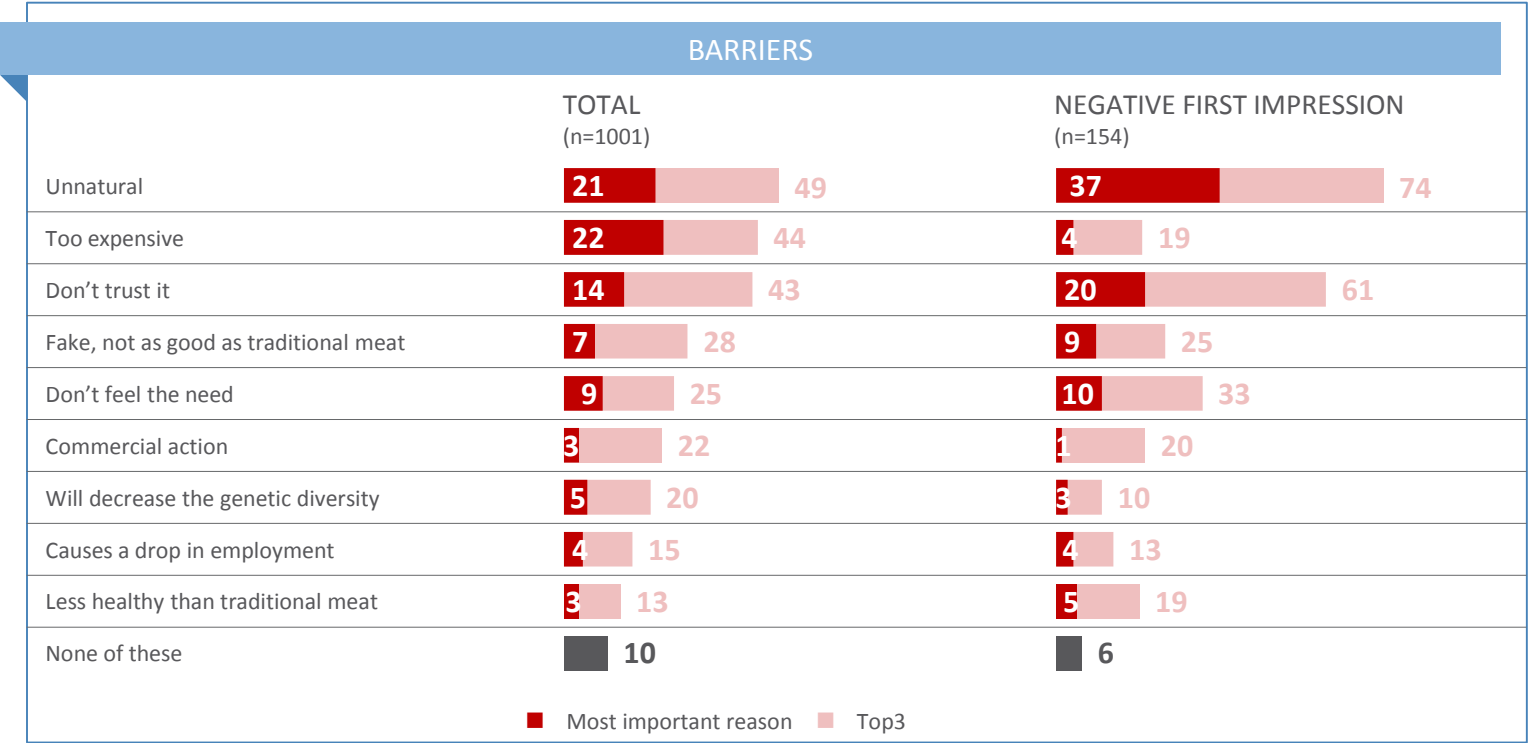
Consumption of cell based meat: drivers



Base: Total sample (n=1001)
 Question: DB1. Drivers consumption cell based meat

The most important barrier for the consumption of cell based meat is the idea of an unnatural production and a low level of confidence. The price is also a possible barrier.

Consumption cell based meat: barriers



Base: Total sample (n=1001)
 Question: DB2. Barriers consumption cell based meat



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GENERAL CONCLUSIONS



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General conclusions and recommendations

CELL BASED MEAT POSITIVELY RECEIVED BY BELGIAN POPULATION

4 out of 10 Belgian people have a **positive first impression** of the concept of cell based meat and another **4 out of 10 respondents** have a **neutral first impression**. The same number of respondents also indicate that they will buy cell based meat, if it is offered at the same price as meat from slaughtered animals. In case of a **10% higher price**, the claimed purchase intention is **24%**.

ANIMAL WELFARE IS THE MAIN DRIVER FOR THE CONSUMPTION OF CELL BASED MEAT

57% of Belgians indicate they would consume cell based meat because it allows them to **eat meat without animal suffering**. Among those who have a positive attitude toward the concept, the percentage amounts to 74%. Other important reasons are the **environment** and the **world food problem** (52% and 46%).

THE TASTE AND TEXTURE FORM AN IMPORTANT OPPORTUNITY FOR THE CONCEPT

The large majority (2/3) of Belgian people are real 'meat-eaters'. For meat-eaters as well as for flexitarians the **good taste** is the main driver, next to culture and habit. This is also an important shortcoming for the current meat substitutes and an important **opportunity** for cell based meat, because its **taste and texture** are the same as those of animal meat.

For more information



GEERT FRANCKEN
Service Line Director

geert.francken@ipsos.com

VITALIE DE BACKERE
Research Director

vitalie.debackere@ipsos.com

NELE CAERLEN
Senior Research Executive

nele.caerlen@ipsos.com

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