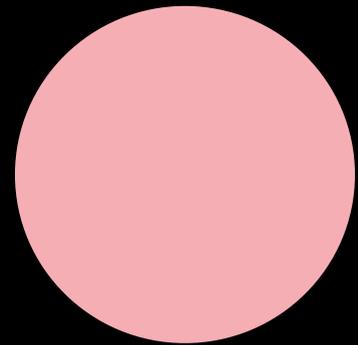
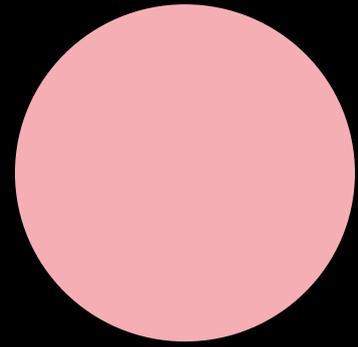


28 February 2020

Cultivated Meat Research for Eurogroup for Animals



Classified: Private

European report,
February 2020

**EUROGROUP
FOR ANIMALS**

Introduction

Food sustainability and animal welfare standards are key areas of focus for Eurogroup for Animals. According to the UN's Food and Agriculture Organisation (FAO), the live-stock sector is responsible for 14.5% of greenhouse gas emissions¹. Amongst other solutions, cultivated meat² has been proposed as a method for countering this problem. If all meat produced in the EU-27 was replaced by cultivated meat, research indicates that this would significantly reduce greenhouse gas emissions, land use and water use by 98.8%, 99.7% and 94% respectively, compared to current meat production practices³.

In addition, some argue that the introduction of cultivated meats to the market would position animal suffering in food production as unnecessary, even to meat eaters⁴. The European Commission has also noted that a 2018 independent report identified the development of new meat alternatives as an important pathway to achieving the Commission's Food 2030 initiative, to deliver a sustainable European food system⁵. Cultivated meat could play a key role in this.

Savanta ComRes was commissioned by Eurogroup for Animals to conduct research in six European countries (France, Germany, Italy, Spain, Poland and Finland) in order to better understand public awareness and perceptions of cultivated meat as a new topic in the public domain. Additionally, this research aims to explore public attitudes to this new alternative to animal meat and establish a benchmark study.

Results from this survey show that whilst awareness of cultivated meat across EU countries surveyed is generally good, understanding of how this new category of meat is made is still relatively low. Around half of those in the EU countries surveyed say they would be likely to try this new category of meat, with the two most appealing factors about making this change from traditional meat are related to reducing the impact on the environment and the number of animals killed. Cultivated meat could therefore be positioned as a viable alternative to animal meat, and to the environmental impact of the meat industry.

¹ <http://www.fao.org/3/a-i3437e.pdf>

² By cultivated meat we mean meat produced by in vitro cell culture of animal cells instead of from slaughtered animals.

³ <https://ec.europa.eu/jrc/en/publication/contributions-conferences/could-cultured-meat-reduce-environmental-impact-agriculture-europe-o>

⁴ [https://www.europarl.europa.eu/RegData/etudes/ATAG/2019/634446/EPRS_ATA\(2019\)634446_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/ATAG/2019/634446/EPRS_ATA(2019)634446_EN.pdf)

⁵ http://www.europarl.europa.eu/doceo/document/E-8-2019-001992-ASW_EN.html#def1

Methodology

Savanta ComRes conducted an online quantitative survey in which adults were interviewed about their current attitudes towards cultivated meat. We interviewed 6,137 adults in six European countries (France, Germany, Spain, Italy, Poland and Finland) aged 18+ online between 11th and 17th February 2020. Data were weighted to be representative of adults aged 18+ by age, gender and region in each of the six countries.

While the combined results cannot guarantee to be representative of the EU as a whole, these countries were chosen with an aim that they would be a good representation of the range of countries within the European Union (EU) in terms of geography, political history and culture.

Guidelines for the public use of survey results

Savanta ComRes is a member of the British Polling Council⁶ and abides by its rules. This commits us to the highest standards of transparency.

The BPC's rules state that all data and research findings made on the basis of surveys conducted by member organisations that enter the public domain must include reference to the following:

- The company conducting the research (Savanta ComRes)
- The client commissioning the survey
- Dates of interviewing
- Method of obtaining the interviews (e.g. in-person, post, telephone, internet)
- The universe effectively represented (all adults, voters etc.)
- The percentages upon which conclusions are based
- Size of the sample and geographic coverage.

Published references (such as a press release) should also show a web address where full data tables may be viewed, and they should also show the complete wording of questions upon which any data that has entered the public domain are based.

All press releases or other publications must be checked with Savanta ComRes before use. Savanta ComRes requires 48 hours to check a press release unless otherwise agreed.

⁶ www.britishpollingcouncil.org

Over half (52%) of adults across the six countries surveyed say that they had heard of this new category of meat before taking the survey. However, only one in five adults (20%) across the six countries surveyed say they had a general understanding of how it is made.

Q. Food companies and universities are currently developing a production method for 'growing meat'. This is done by taking a sample of cells from a living animal and using these to grow the meat in a controlled condition, such as a laboratory. Evidence shows this new category meat could reduce the number of animals killed for meat production. This could reduce our environmental impact, reduce the use of antibiotics (traditionally used in animal feed) and improve food safety compared to traditional meat, whilst retaining the same properties (e.g. taste, texture). Before taking this survey, had you heard of this new category of meat before?

% of adults who say each of the following	Total	France	Germany	Spain	Italy	Poland	Finland
Yes, I had heard of it and had a general understanding of how it is made	20%	20%	20%	20%	23%	17%	21%
Yes, I had heard of it but I did not understand how it is made	32%	26%	32%	32%	29%	38%	34%
No, I had not heard of it	45%	49%	44%	45%	45%	42%	42%
I can't remember	3%	5%	4%	3%	3%	3%	3%
NET: Heard of	52%	46%	52%	52%	52%	55%	55%

Base: All adults (n=6,137), All adults in France (n=1,037), in Germany (n=1,008), in Spain (n=1,031), in Italy (n=1,007), in Poland (n=1,049), in Finland (n=1,005)

Almost half of adults (45%) across the six countries surveyed say they had never heard of this new category of meat, whilst 3% say they could not remember.

- Adults in **Poland** and **France** (55% each) are most likely to say they have **heard of this new category meat**, while adults in **France** are the least likely to say they have heard of this method (46%). Adults in **Italy** are the most likely to say that they **had heard of this new category of meat and had a general understanding of how it is made** (23%) prior to taking the survey.
- Awareness of this new category of meat is lower amongst older age groups, **18-34 year olds** are the most likely to be aware with over half who say they have **heard of this new category of meat** (57%), this declines slightly for 35-54 year olds (53%), whilst less than half of adults aged **55+** (48%) say that have heard of this category of meat.
- Diet also appears to have an impact on awareness, adults who **eat a reduced intake of animal products** are significantly more likely to have **heard of this new category of meat** than **adults who eat meat, fish, dairy and/or other animal products** (62% vs. 50% respectively).

When asked to select what would be a good name for this new category of meat from a list, cultured meat was the most frequently selected name across the six countries surveyed (22%), followed by cultivated meat (20%), slaughter-free meat (14%), cell-based meat (13%) and clean meat (12%).

Q. Which of the following, if any, do you think would be a good name for this new category of meat?

% who selected each of the following	Total	France	Germany	Spain	Italy	Poland	Finland
Cultured meat	22%	27%	28%	12%	19%	15%	32%
Cultivated meat	20%	12%	9%	36%	25%	18%	23%
Slaughter-free meat	14%	7%	18%	19%	20%	15%	9%
Cell-based meat	13%	20%	12%	6%	10%	18%	10%
Clean meat	12%	11%	13%	11%	9%	21%	8%
Other	2%	1%	1%	1%	3%	2%	2%
Don't know	16%	22%	19%	15%	15%	11%	16%

Base: All adults (n=6,137), All adults in France (n=1,037), in Germany (n=1,008), in Spain (n=1,031), in Italy (n=1,007), in Poland (n=1,049), in Finland (n=1,005)
Bolded % = most frequently selected option in each country

- When looking at individual countries, the most frequently selected name in **France, Germany and Finland** is **cultured meat** (27%, 28% and 32% respectively).
 - Adults in **Spain and Italy** are most likely to select **cultivated meat** (36% and 25% respectively).
 - However, **clean meat** is the most frequently selected name in **Poland** (21%).
- Adults in **Spain** are significantly more likely to select **cultivated meat** than adults in other countries (Spain 36%, Italy 25%, Finland 23%, Poland 18%, France 12%, Germany 9%).
 - Adults in **Finland** are significantly more likely to select **cultured meat** than adults in other countries (Finland 32%, Germany 28%, France 27%, Italy 19%, Poland 15%, Spain 12%).
 - Adults in **Poland** are significantly more likely to select **clean meat** than adults in other countries (Poland 21%, Germany 13%, Spain 11%, France 11%, Italy 9%, Finland 8%).
- **Adults across the countries surveyed, who eat a reduced intake of animal products** are significantly more likely to think that **slaughter free meat** would be a good name for this new category of meat than **adults who eat meat, fish, dairy and/or other animal products** (18% vs. 14% respectively).
- Interestingly, adults **across the countries surveyed**, who say they are **likely to try this new category of meat** are significantly more likely than those who say they are unlikely to try it to select **slaughter free meat** (20% vs. 8% respectively) and **clean meat** (18% vs. 6% respectively) as good names for this new category of meat.
- Adults **across the countries surveyed**, who say they are **unlikely to try this new category of meat** are significantly more likely than those who say they are likely to try it, to select **cultured meat** (27% vs. 21% respectively) and **cell-based meat** (15% vs. 12% respectively) as good names for this category of meat.

Over half (55%) of adults across the six countries surveyed say that they would be likely to try this new category of meat provided that everything was the same as traditional meat (e.g. taste, price, texture etc.).

Q. Provided everything was the same as traditional meat (e.g. taste, price, texture etc.), how likely, if at all, would you be to try this new category of meat?

Net % adults who selected the following	Total	France	Germany	Spain	Italy	Poland	Finland
Likely	55%	35%	55%	61%	59%	63%	54%
Unlikely	33%	50%	33%	26%	28%	28%	35%
Don't know	12%	15%	11%	13%	13%	8%	10%

Base: All adults (n=6,137), All adults in France (n=1,037), in Germany (n=1,008), in Spain (n=1,031), in Italy (n=1,007), in Poland (n=1,049), in Finland (n=1,005)

- Adults in **Poland** (63%) and **Spain** (61%) are the most likely to say that they would be **likely to try** this new category of meat, while adults in **France** are the least likely (35%).
- Across the countries surveyed, **men** are significantly more likely than **women** to say that they would be **likely to try** this new category of meat (58% vs. 51% respectively).
- Claimed likelihood to try this new category of meat is lower amongst older age groups, approaching two thirds of adults aged **18-34** (64%) say they would be **likely to try** this new category of meat, compared to less than three in five **35-54 year olds** (56%) and less than half of those aged **55+** (48%).
- When looking at diet and likelihood of trying this new category of meat, interestingly, there are no differences between adults across the countries surveyed, who eat meat, fish, dairy and/ or other animal products and adults who eat a reduced intake of animal products, as over half of both groups (55% each) say they would be likely to try this new category of meat.
 - However, adults who **eat a reduced intake of animal products** are significantly more likely to say they would be **very likely** try this new category of meat than **those who eat meat, fish, dairy and/or other animal products** (25% vs. 19%).
 - Adults who say they **have heard of this new category meat and understand how it is made** (68%) are more likely to say they would try this meat than those who **have heard but do not understand** (63%) or have **not heard at all** (45%).

The majority (95%) of adults across all six countries surveyed say that taste was an important factor when making food choices. In comparison, of the factors tested, convenience is the least likely to be seen as important (74%), while around one in five adults (22%), say it is an unimportant factor when making food choices.

Q9. How important or unimportant are each of the following when making your food choices

Net % important	Total	France	Germany	Spain	Italy	Poland	Finland
Taste	95%	92%	95%	93%	95%	96%	97%
Food safety (i.e. the likelihood of catching food borne diseases)	93%	91%	89%	94%	96%	96%	92%
Health and nutrition	93%	90%	91%	95%	96%	94%	91%
The welfare of animals	87%	87%	88%	84%	92%	89%	84%
The environment	87%	85%	86%	87%	93%	91%	80%
Cost	87%	85%	80%	87%	89%	90%	90%
Convenience	74%	66%	56%	74%	82%	79%	88%

Base: All adults (n=6,137), All adults in France (n=1,037), in Germany (n=1,008), in Spain (n=1,031), in Italy (n=1,007), in Poland (n=1,049), in Finland (n=1,005)

Bolded % = most frequently selected option in each country

Net % unimportant	Total	France	Germany	Spain	Italy	Poland	Finland
Taste	4%	5%	3%	5%	4%	2%	3%
Food safety (i.e. the likelihood of catching food borne diseases)	5%	6%	7%	3%	3%	3%	6%
Health and nutrition	6%	8%	8%	4%	3%	5%	7%
The welfare of animals	10%	10%	9%	12%	6%	8%	14%
The environment	11%	12%	12%	11%	6%	7%	18%
Cost	11%	12%	18%	10%	10%	9%	9%
Convenience	22%	27%	39%	23%	17%	19%	9%

Base: All adults (n=6,137), All adults in France (n=1,037), in Germany (n=1,008), in Spain (n=1,031), in Italy (n=1,007), in Poland (n=1,049), in Finland (n=1,005)

Bolded % = most frequently selected option in each country

- **Taste** is the most likely to be selected as an important factor when making food choices by adults in **Finland** (97%), **Germany** (95%) and **France** (92%).
 - In **Poland** **taste** is ranked as important as **food safety** (96% for each), whilst in **Italy** **food safety** is tied with **health and nutrition** (96% for each) as the most commonly selected important factor when making food choices.
 - Whereas, **health and nutrition** is the most likely to be selected as an important factor when making food choices by adults in **Spain** (95%).
- Adults in **Finland** were significantly more likely to rate the **environment** as an **unimportant** factor when making food choices than any other country surveyed (Finland 18%, Germany 12%, France 12%, Spain 11%, Poland 7%, Italy 6%).
- Interestingly, adults in **Italy** (92%) are significantly more likely to rate the **welfare of animals** as an important factor when making food choices than adults in any of the other countries (Poland 89%, Germany 88%, France 87%, Spain 84%, Finland 84%).
- **Respondent who eat meat, fish, dairy and/or other animal products** are significantly more likely than **those who eat a reduced intake of animal products** to rate **convenience** (75% vs. 70%), **cost** (88% vs. 81%) and **taste** (95% vs. 93%) as an important factor when making food choices.
 - Conversely, **those who eat a reduced intake of animal products** are significantly more likely than **those who eat meat, fish, dairy and/or other animal products** to rate the **welfare of animals** (91% vs. 87%) and the **environment** (91% vs. 86%) as an important factor when making food choices than those who eat animal products.

When thinking about replacing traditional meat consumption with the new category of meat, amongst those who said they would be likely to try this meat, over half of adults (64%) across the six countries surveyed said that ‘reducing the number of animals which are farmed and killed for traditional meat production’ appeals to them.

Q. You've mentioned you are likely to try this new category of meat. Please think about replacing traditional meat consumption with this new category of meat and the reasons why you might do this ... Which of the following factors, if any, appeal to you about this new category of meat?

	Total	France	Germany	Spain	Italy	Poland	Finland
Reducing the number of animals which are farmed and killed for traditional meat production	64%	64%	69%	66%	67%	61%	55%
Reducing my environmental footprint	51%	50%	49%	62%	36%	51%	54%
Eating a safer alternative to traditional meat (i.e. less likely to carry food borne diseases)	47%	42%	45%	54%	49%	51%	39%
Eating a healthier alternative to traditional meat	46%	39%	43%	50%	47%	53%	41%
Seeing the difference between this new category of meat and traditional meat	30%	24%	34%	43%	26%	24%	27%
Other	1%	1%	1%	*	*	1%	1%
None of these appeal to me	2%	3%	2%	1%	1%	2%	3%
Don't know	2%	2%	2%	2%	1%	2%	2%

Base: All adults who say they are likely to try ‘new category meat’ (n=3,369), All adults who say they are likely to try ‘new category meat’ in France (n=355), in Germany (n=565), in Spain (n=634), in Italy (n=596), in Poland (n=665), in Finland (n=554)

Bolded % = most frequently selected option in each country

The following findings are amongst those who said they would be likely to try this new category of meat and not out of the total population per country.

- When looking at individual countries, in **Spain**, adults are significantly more likely to say that ‘**reducing their environmental footprint**’ appeals to them as a reason to try this new category of meat, compared to adults in all other countries surveyed (Spain 62%, Finland 54%, Poland 51%, France 50%, Germany 49% and Italy 36%).
- Adults in **Finland** are significantly less likely to say that **reducing the number of animals which are farmed and killed for traditional meat production** appeals to them than adults in all other countries surveyed (Finland 55%, Poland, 61%, France 64%, Spain 66%, Italy 67%, Germany 69%).
- When looking at diet, **adults who eat a reduced intake of animal products** are significantly more likely than **adults who eat meat, fish, dairy and/or other animal products** to say ‘**reducing the number of animals which are farmed and killed for traditional meat production**’ (73% vs 62%) and ‘**reducing their environmental footprint**’ (61% vs 49%) appeals to them.

Conclusions & recommendations

Conclusions

- Over half (52%) of adults across the six countries surveyed say that they had heard of this new category of meat before taking the survey, demonstrating good awareness.
- Cultured meat was the most frequently selected name across the six countries surveyed (22%). However, there are significant differences between the names selected by those who say they would try this new category of meat and those who say they would not (21% vs. 27% respectively). Adults who say they would try this new meat selected names associated with ethics and the production of the meat, whilst adults who would not try opted for more clinical or scientific names.
- The majority (95%) of adults across all six countries surveyed said that taste was an important factor when making food choices, cost (87%) and convenience (74%) were the least likely to be selected as important factors.
- Over half of adults (55%) say they would be likely to try this new kind of meat, while a third (33%) say they would be unlikely to do so.
- Of those who said they would be likely to try this new kind of meat, the top two reasons which appealed to adults across all six countries were: reducing the number of animals which are farmed and killed for traditional meat production (64%) and reducing their environmental footprint (51%).
- Of the countries surveyed, Finland seems to be an outlier in its views, adults in this country were significantly more likely to say environment was an unimportant factor when making food choices (18% Finland vs. 12% each Germany and France, 11% Spain, 7% Poland, 6% Italy). Additionally, Finnish adults are significantly less likely to say that reducing the number of animals which are farmed and killed for traditional meat production appeals to them than adults in all other countries surveyed (55% Finland vs. 69% Germany, 67% Italy, 66% Spain, 64% France, 61% Poland).

Recommendations

- Use findings to demonstrate good levels of awareness (52%) and likelihood to try cultivated meat (55%) across a range of European countries. Since levels of awareness and likelihood to try are similar, this could indicate that they are closely associated with each other. This may mean that as awareness and acceptance of cultivated meat increases in the future, willingness to try may also increase.
- Taste, food safety, health and nutrition, and the environment are claimed to be more important factors to consumers than cost and convenience. This suggests there could be a willingness to pay more for healthier and more environmentally friendly products⁷. This can be used to strengthen Eurogroup for Animals' stance that cost is less important to EU consumers than sustainable products. However, it is important to consider the implication of affluency on public perceptions of cost and convenience, which was not tested in this survey.
- Consider targeted communications which will appeal to consumers who are likely to try this new category of meat, focusing on the implications for animal welfare and the environment.
- Finally, this study found that among adults who are willing to try cultivated meat, names outlining the production methods were most favourable, such as 'slaughter free meat' and 'clean meat'. Since cultivated meat only differs from traditional meat by its method of production, these findings appear to demonstrate that there may be appetite among consumers for labelling animal products by their production method. This could support Eurogroup for Animals' campaign for 'mandatory-method-of-production labelling,' whereby products should be explicitly labelled according to their method of production. Eurogroup for Animals claims this will help consumers to be

⁷ https://www.eurogroupforanimals.org/wp-content/uploads/E4A-Policy-Paper-Labeling_and_WTO_04-2019-screen.pdf

more informed about the production of their food and therefore allow them to make more sustainable food choices.

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