

Consumer Attitudes around Plant-based Meat

July 2021

KEY FINDINGS

1 Product packaging is a key driver of consumer confusion

- At the start of the survey, respondents underwent a packaging association task to directly test whether product packaging contributes to consumer confusion around differentiating animal vs plant-based meat (see research methodology for task description)
- Net misattribution for each plant-based meat product ranged from 13% to 33% (average misattribution per product being 25%). Misattribution for all plant-based meats tested was higher than the animal meat control (Woolworths beef mince)
- Most (61%) mistook at least one plant-based meat product as containing animal meat
- Those who mistook at least one plant-based meat as containing animal meat were more likely to be:

Elderly (aged 65+)

Speak a language other than English with family / friends

Have a household income of \$40k or below

- Half of Australians (51%) find packaging for the products tested in the survey to be confusing
- Reflecting on their own personal experiences, 1 in 3 consumers (32%) think they've mistaken plant-based meat for animal meat due to its packaging in the past, and almost 2 in 3 (62%) believe that other people may have also made the same mistake

2 Specific packaging features that cause this confusion mainly revolve around the use of animal imagery and minimising 'plant-based' references in favour of meat descriptors

- Among the 51% Australians who find the packaging tested in-survey at least somewhat confusing, 1 in 3 (36%) mention animal imagery as a driver of confusion. A combination of small or hard to read font for 'plant-based' references (19%) and the use of meat descriptors (14%) also contribute to consumer confusion
- Almost 2 in 3 (64%) say they expect plant-based meat to contain animal meat if its packaging does at least one of the following:

Describes the product as 'meat'

Uses images / icons of animals (e.g. cows, chickens, and pigs)

Uses words like 'beef', 'chicken', and 'lamb'

3 There is strong community support for clearer packaging for plant-based meat

- Most consumers think that plant-based meat packaging should not be allowed to...
 - Describe the product as 'meat' (73%)*
 - Use images / icons of animals (e.g. cows, chickens, and pigs) (70%),*
 - Use words like 'beef', 'chicken', and 'lamb' (63%)*
- Just over half of Australians (56%) feel plant-based meat packaging should not be allowed to use any of the three features above



Attitudes to Plant-based Meat

Consumer Research Report

July 2021

Research approach

Why

To understand community understanding and attitudes to plant-based meat and their product packaging

What

10min online survey among a robust, nationally representative sample of n=1000 Australians, where age, gender and location have been weighted to reflect ABS 2020 population data

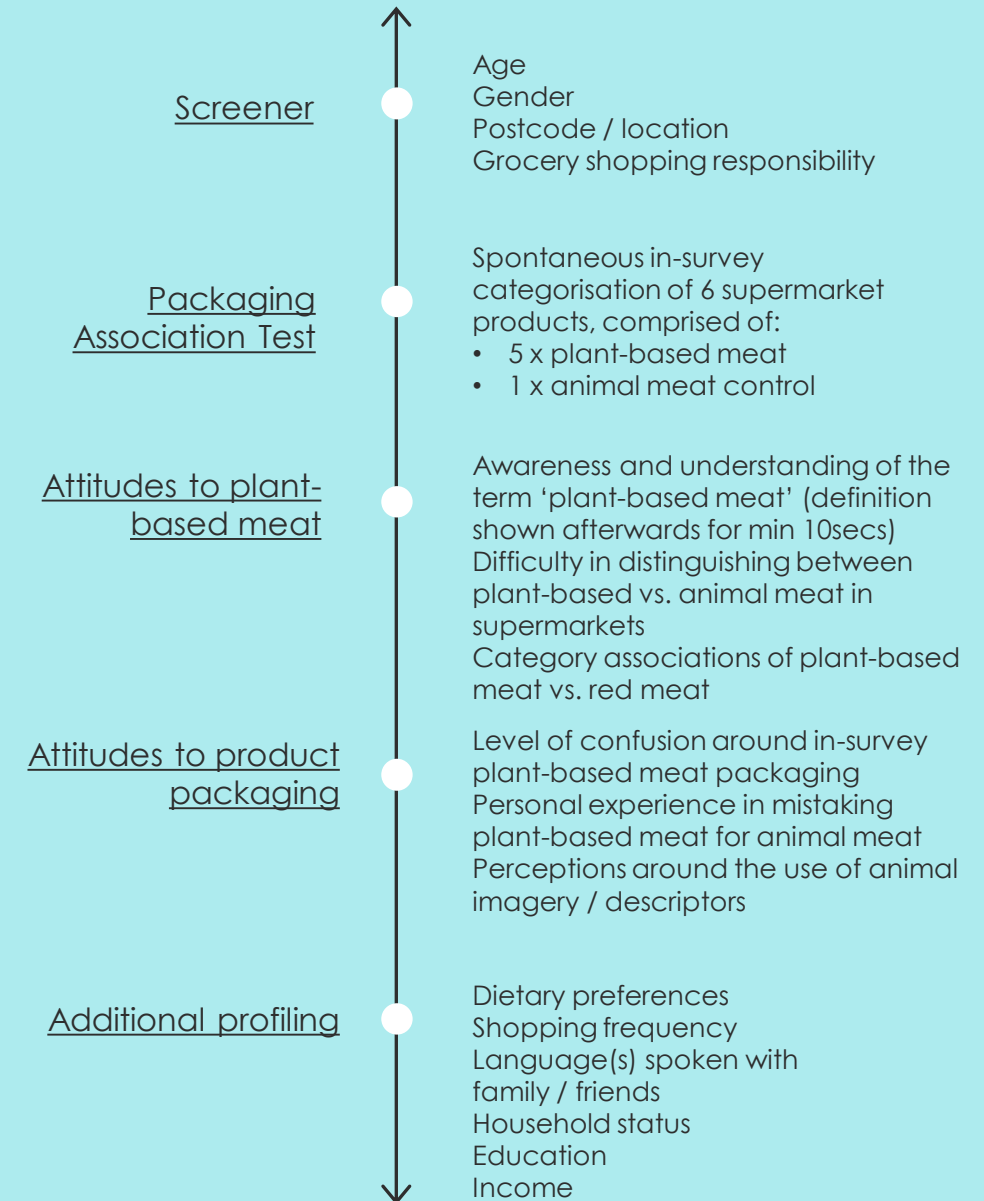
Fieldwork was conducted from 9 -14 July. Respondents were sourced from a preferred ISO 20252 accredited panel supplier, Pureprofile

How

A multi-pronged approach was used to investigate potential consumer confusion in differentiating between plant-based vs. animal meat. The level of consumer confusion was measured in a number of ways via:

- A spontaneous packaging association test at the start of the survey (measuring perceptions and misattribution)
- Personal experience among shoppers who have previously seen plant-based meat in-situ in supermarkets and among all respondents given in-survey packaging examples
- Personal expectations regarding whether a product contains plant-based meat if it contains the following features:
 - Images / icons of animals(e.g. cows, chickens, and pigs)
 - Words like 'beef', 'chicken', and 'lamb'
 - Described the product as ' meat '

Plant-based products shown in-survey ranged across a mix of meat descriptors (e.g. beef, chicken, pork), product types (e.g. burger patties, sausages), and brands (e.g. Beyond Meat, Sunfed). An animal meat product (Woolworths beef mince) was also used as a control in the spontaneous packaging association.



Who we spoke to

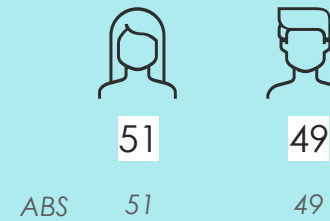
10min online survey

Nationally representative sample

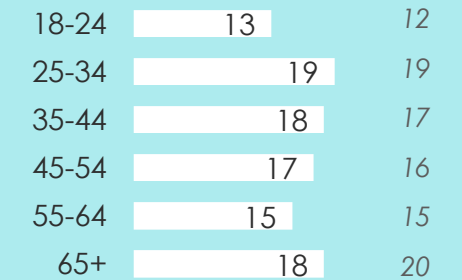
n=1000 Australians aged 18+

Fieldwork was conducted in 9-14 July 2021

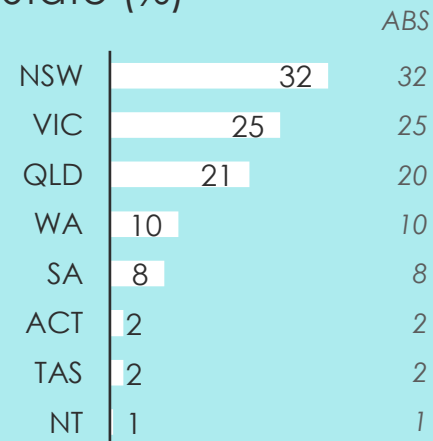
Gender (%)



Age (%)

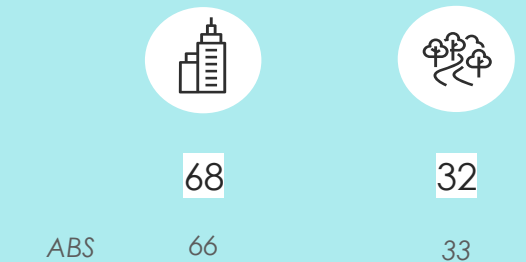


State (%)



Metro

Regional

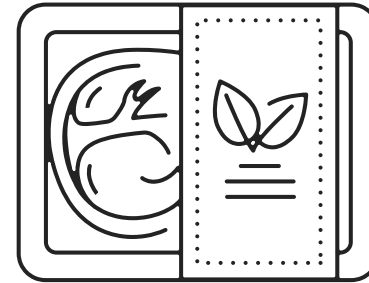


Looking at packaging specifically...

At the start of the survey, respondents underwent a packaging association task

Respondents were shown a product for 3 seconds and then asked to choose what category they believed the product belonged to (see right for full question)

This process was repeated for all 6 products tested in the survey

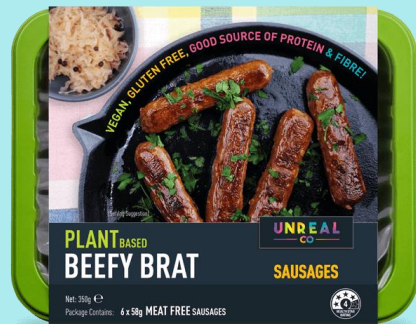


What best applies to the product you just saw?

- *Only contains animal meat*
- *Contains a mix of animal meat and plant-based ingredients*
- *Only contains plant-based ingredients*

6 products currently available in Australian supermarkets were used

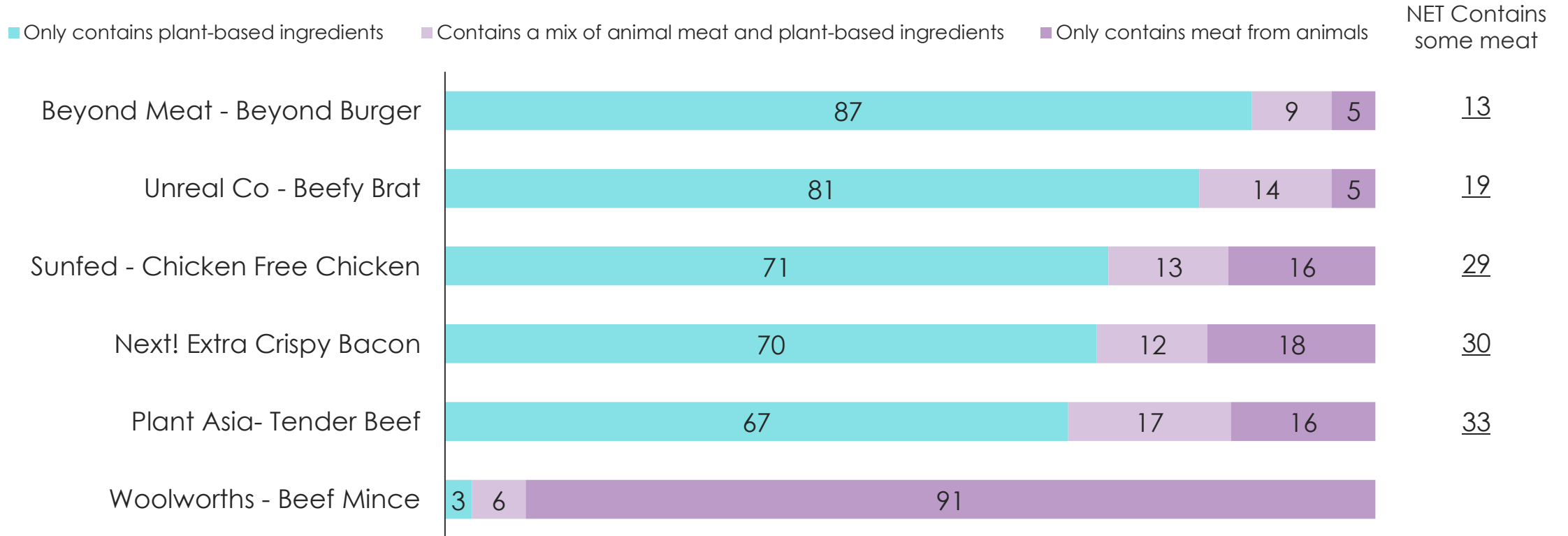
5 x plant-based meats



1 x animal meat (control)

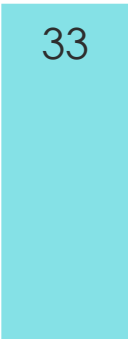


Product ingredients (%)



NET Misattribution (%)

Average misattribution: 25%



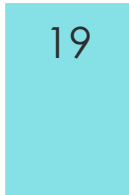
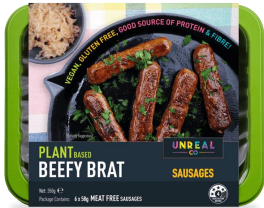
Plant Asia Tender Beef



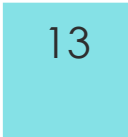
Next! Extra Crispy Bacon



Sunfed Chicken Free Chicken



Unreal Co Beefy Brat



Beyond Meat Beyond Burger



Most mistook at least one plant-based product as containing animal meat

61%

Were incorrect on at least 1 of the 5 plant-based meats tested

ie selected either

- 'Only contains animal meat', or
- 'Contains a mix of animal meat and plant-based ingredients'

Those who
mistake at least
one plant-based
meat as
containing
animal meat
are more likely
to be...



Male

Aged 65+

Empty nesters



Speak a language other than
English with family / friends



Have a household income
of \$40k or below

Confusion is driven by packaging and placement in supermarkets

*Among those who have
seen plant-based meat
instore/online*

*Have a hard time figuring out whether a product is
made of plant-based vs. animal meat when looking at...*

...where the products are
placed in the supermarket **47%**

...product packaging **45%**

...how the product is
categorised online **42%**

C4. Thinking about shopping for groceries, have you ever had a hard time figuring out whether a product is made of plant-based vs. animal meat when looking at... Base: Seen plant-based meat online n=512, Seen plant-based meat in-store n=802, Seen plant-based meat online or instore n=810

The vast majority of
Australians are
aware of the term
'plant-based meat'

*Have you ever heard the term
'plant-based meat' before today? (%)*

88%

Australians have heard
of the term 'plant-based
meat' before

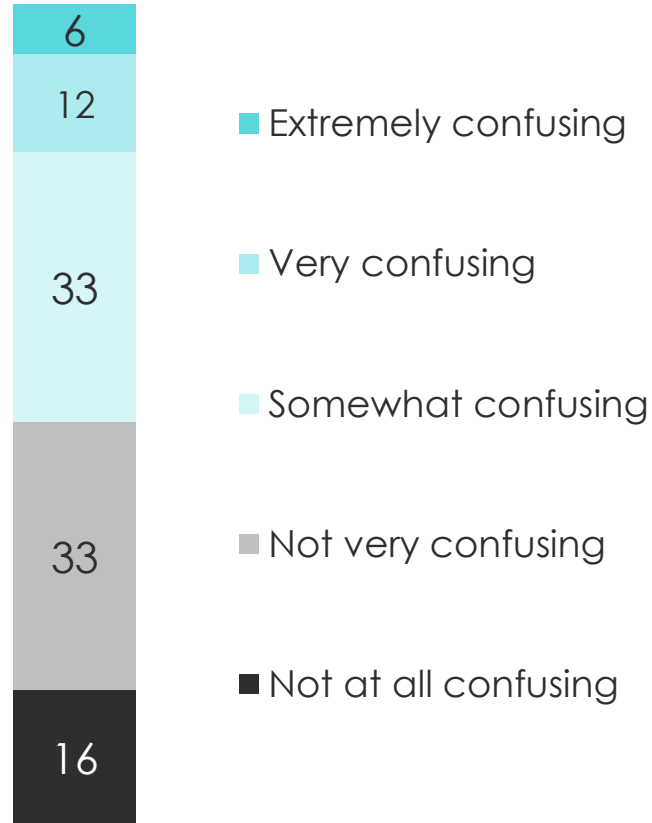


Half of Australians find packaging for the products tested in the survey to be confusing

Level of confusion when determining animal vs plant-based meat based on packaging (%)

Top 3 box

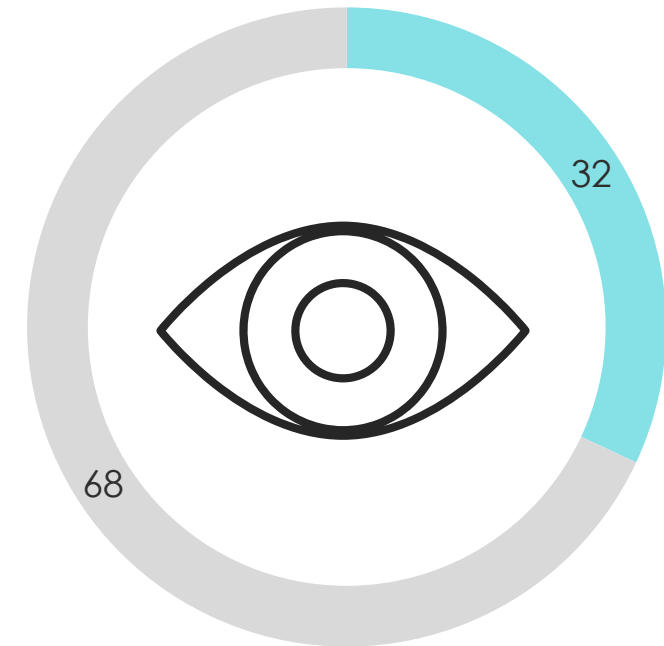
51



D2. When it comes to being able to determine whether there is any animal meat in the product, how confusing is this packaging for you?.
Base: Total sample n=1000.

Reflecting on their own experiences, many (1 in 3) Australians think they've mistaken plant-based meat for animal meat

Do you think you have ever mistaken plant-based meat for animal meat due to its packaging? (%)

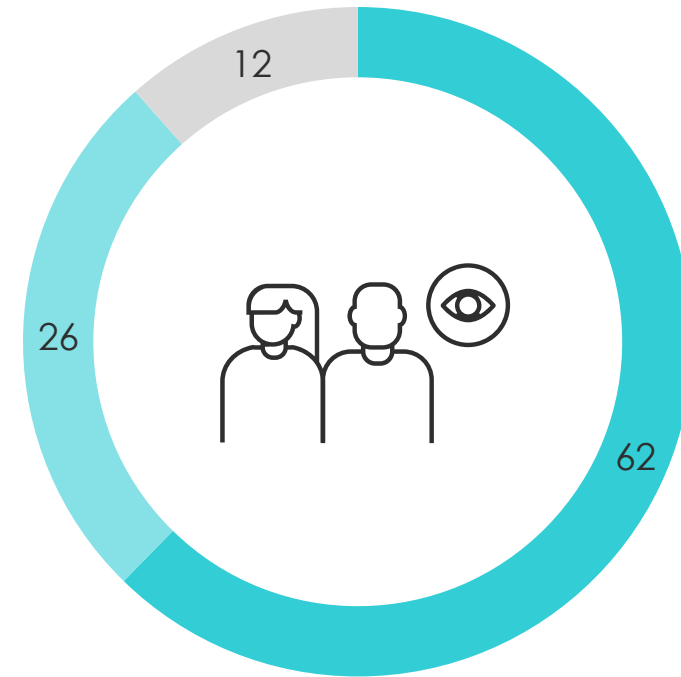


■ Yes

■ No

Almost 2 in 3 think other people could make the same mistake

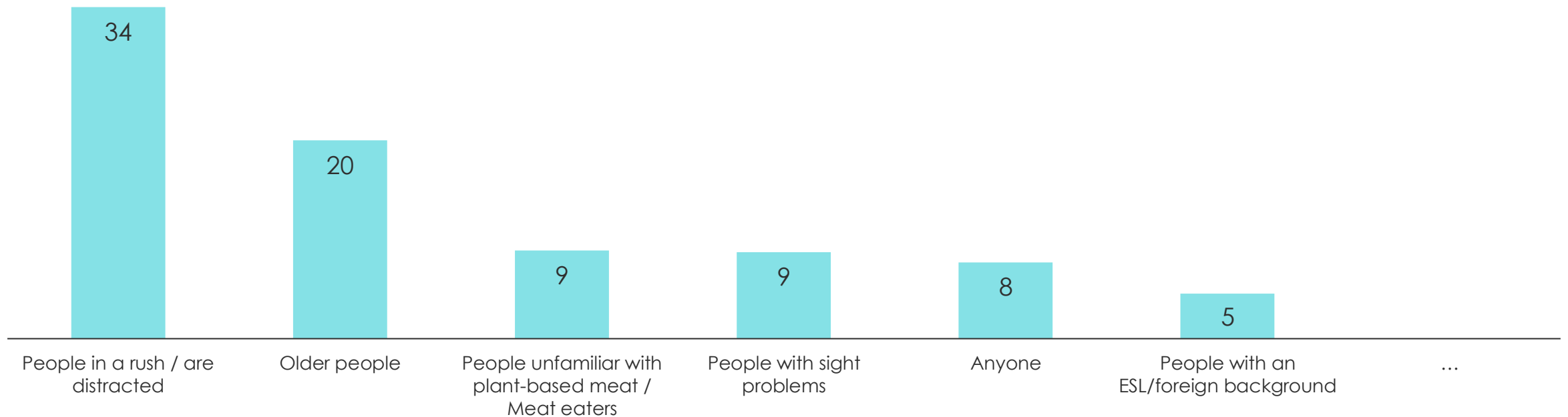
Do you think other people could mistake plant-based meat for animal meat? (%)



■ Yes ■ Unsure ■ No

Australians believe consumers who are in a rush and those who are 'older' are the most likely to make mistakes

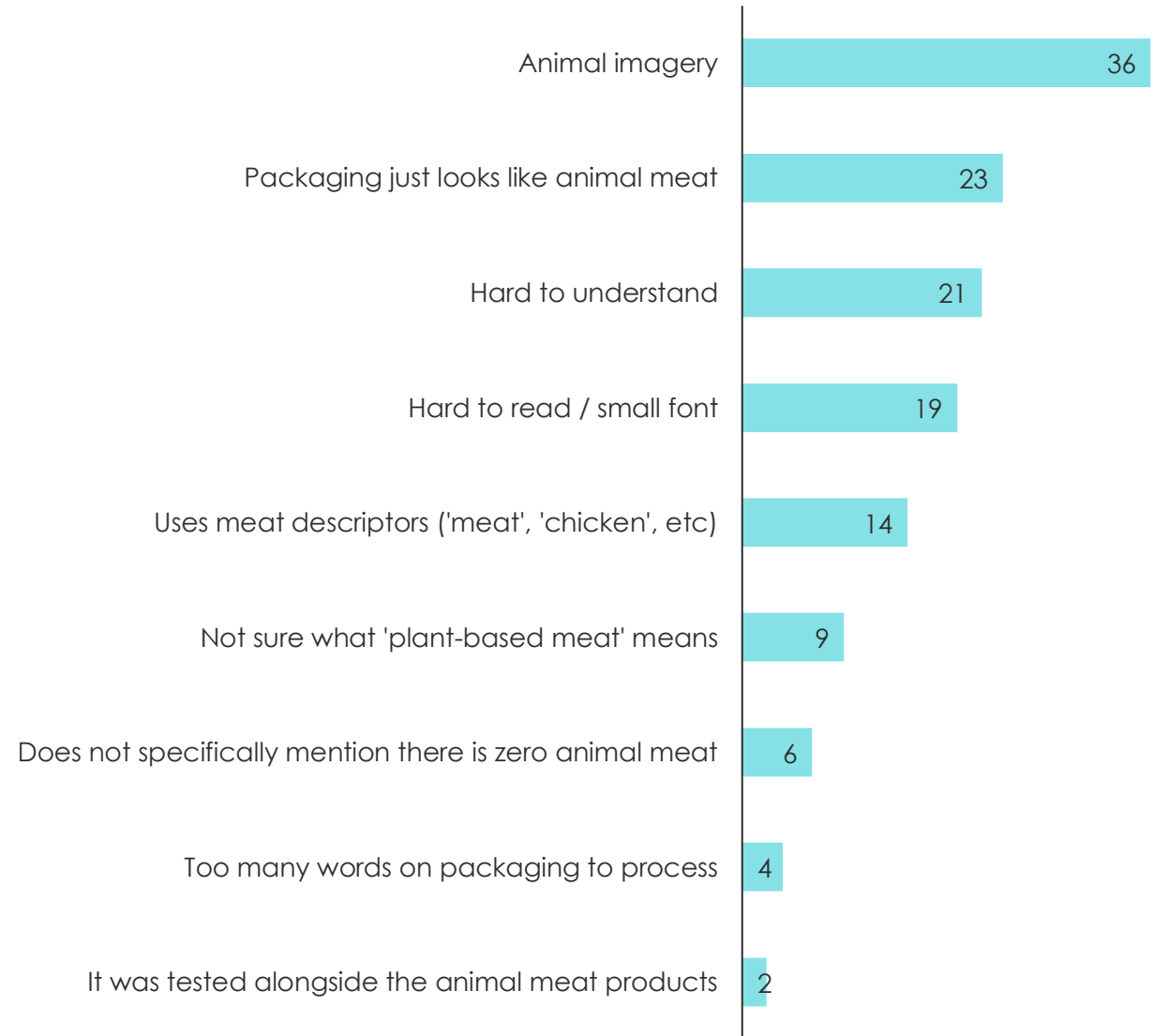
Who do you think are most likely to mistake plant-based meat for animal meat due to packaging (Coded OE%) - Among those who think other people could mistake plant-based meat for animal meat



Animal imagery was the main source of confusion for plant-based meat packaging

*Reasons why plant-based
meat packaging is confusing
(Coded OE%)*

*- Among those who think
plant-based meat packaging
is at least somewhat
confusing (Top 3 box)*





Looking into the specifics, animal imagery and minimising ‘plant-based’ labelling in favour of meat descriptors are the top areas of confusion

Reasons why plant-based meat packaging is confusing

Animal imagery – 36%

The issue is (like myself) they may mistake these items for actual meat products have shown a photo of the animals clearly which brought to my attention instead of the wordings "plant-based"

Very confusing when images of animals are on packaging, when manufacturers try to make the product look like an animal product and when they name their products with VERY similar sounding names to meat products

They have animal pictures on the packs implying they contain meat If they are plant-based they should NOT have animals on the pack.

A lot of them show images of animals. For someone who may have vision issues (like myself) they may mistake these items for actual meat products

Hard to read / small font – 19%

Because the printing is very small and an older person would find it difficult to read

Even though they are plant-based meat, there are still significant size of wording such as Pork, Beef, Chicken, etc

Sometimes the words plant based are very small or blend in. Also plant based is a bit ambiguous

Any relation to plant based is in smaller writing

The plant based tag is quite small on some of the packages

Having the "meat" words significantly larger and more prominent than the plant based words, especially as these products are often adjacent to their meat counterparts in supermarkets

Use of meat descriptors – 14%

It says chicken but isn't chicken. Could say chicken substitute. It could be misleading

Using the words meat, or chicken or bacon

Because it's packaged and labeled as "chicken" then smaller under it says "like chicken". I've accidentally bought plant based before by accident

Why put the word meat if [there is] no meat

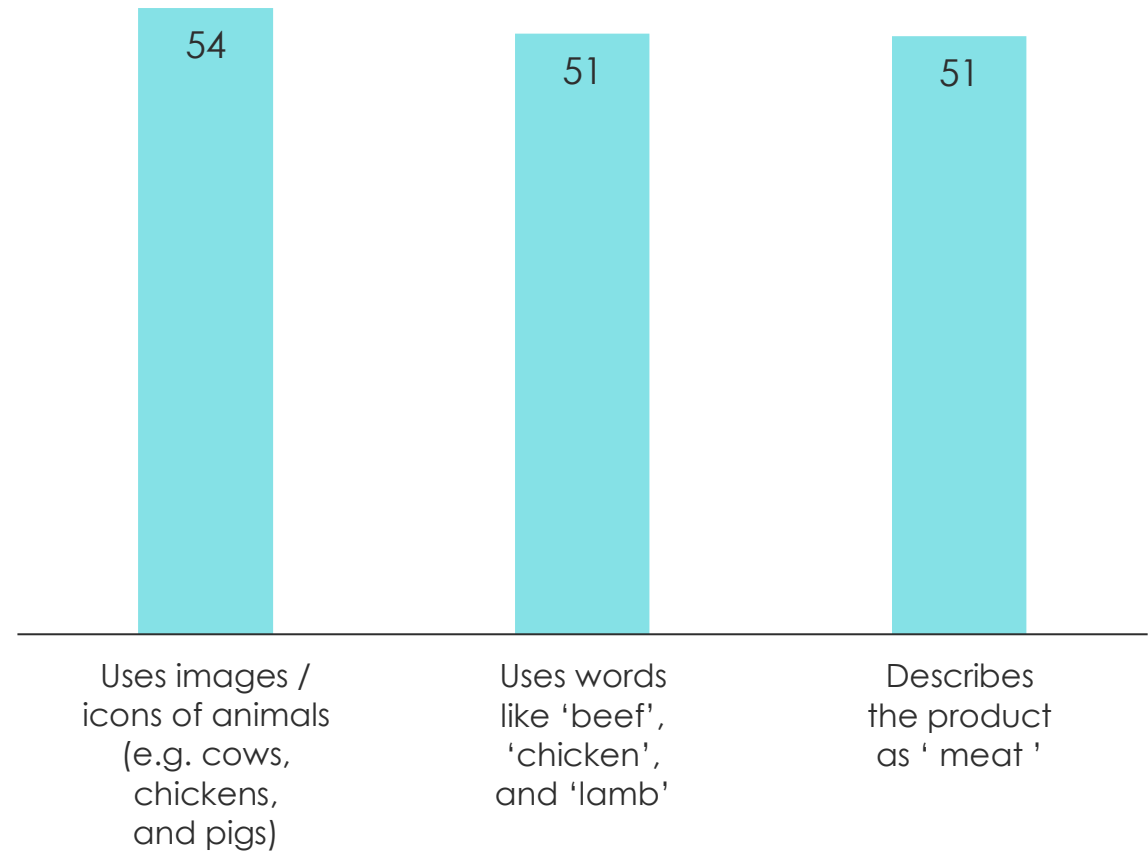
Because it needs to be written larger than there is no meat at all. When you have 'meat products' written it sounds like there is meat included.

They emphasise the meat component

They still highlight words like Beefy, patties. At first glance I think it is a meat product

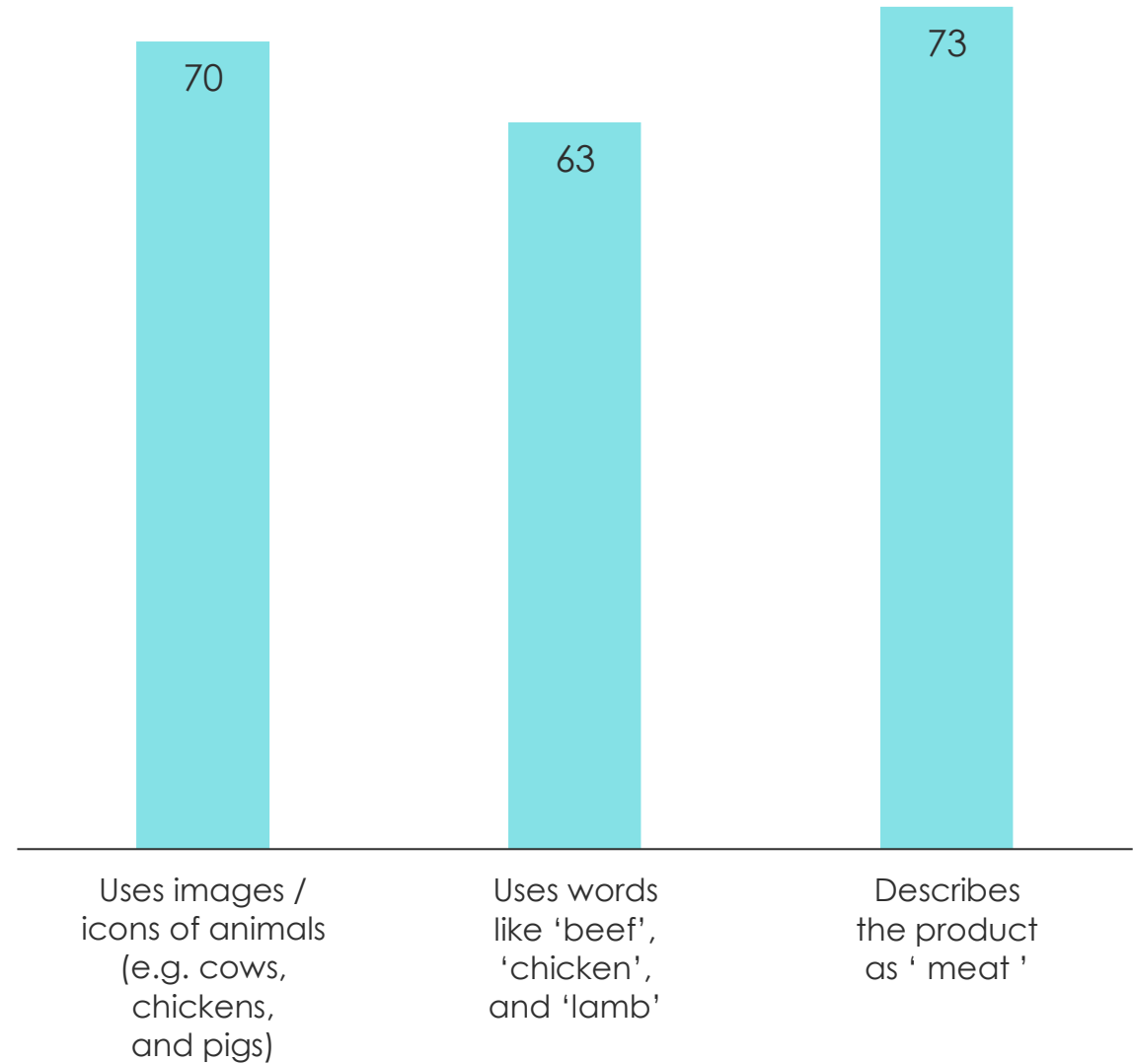
Around half of consumers expect the product to contain animal meat if meat descriptors or imagery is used

Do you expect the product to contain animal meat if the packaging...(Yes %)



And most do not think plant-based meat should be able to use meat descriptors or imagery

Do you think plant-based meat should be allowed to... (No %)



Packaging for plant-based vs. animal meat is seen as confusing by the majority...

64%

Say they expect the product to contain meat if it has at least one of the following...

- Images / icons of animals (e.g. cows, chickens, and pigs)
- Words like 'beef', 'chicken', and 'lamb'
- Described the product as 'meat'

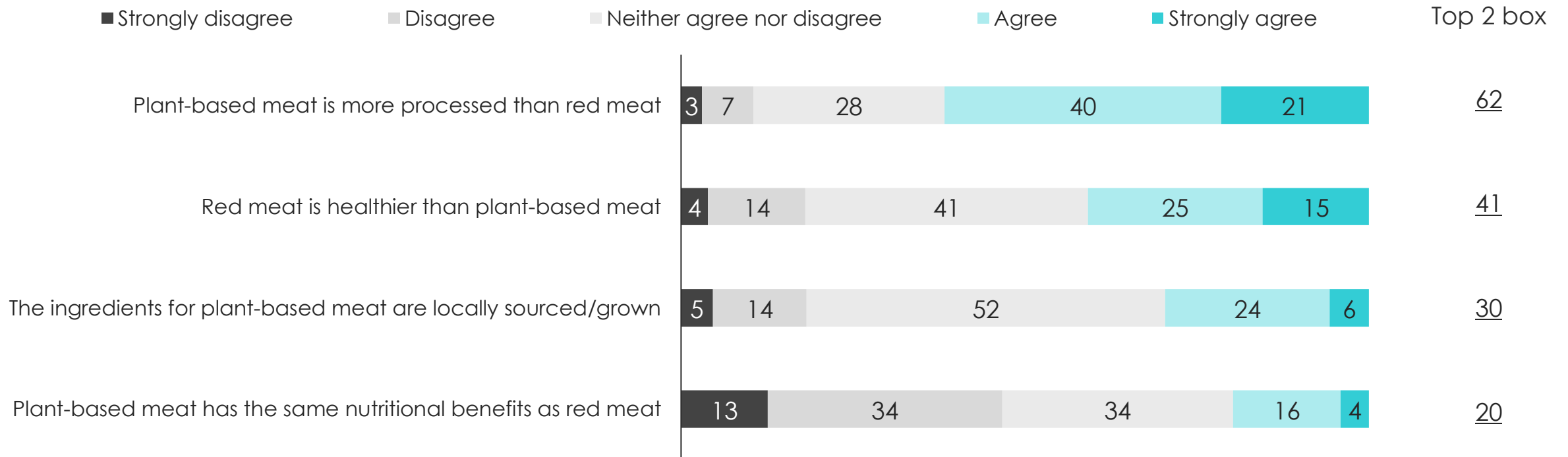
...and half support clearer packaging for plant-based meat

56%

Say plant-based meat should not be allowed to use any of the 3 packaging features

When it comes to comparing red vs. plant-based meat, many are still on the fence

Agreement with statement (%) – Among those aware of plant-based meat



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