

# Consumer Attitudes around Plant-based Meat

July 2021

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## 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

## RESEARCH METHODOLOGY

Pollinate conducted a 10-min online survey among a nationally representative sample of  $n=1000$  Australians aged 18+, with age, gender and location weighted to align with ABS 2020 population data. Survey fieldwork was conducted between 9-14 July 2021, with respondents being recruited from a preferred ISO 20252-accredited sample partner, Pureprofile

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

### Description of Packaging Association Test

#### 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

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### Products shown in survey

#### 6 products currently available in Australian supermarkets were used

5 x plant-based meats



1 x animal meat (control)



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