CANADA 2021

USA 2021

Consumer Perspectives on Plant-Based Meat: 2021

Two new studies released this summer

Primary areas of focus

FOCUS AND SCOPE

- Category purchasing habits
- Purchase triggers
- Demand drivers and barriers
- Current consumption patterns and trends
- Brand awareness, usage and purchase intent
- Brand preferences
- Brand associations
- Importance of product attributes and claims
- Pricing expectations
- Consumer experience with brands they've used

Sample spec:

Size: N=1,000 (per country)

Region: Nationally representative

Language: English (& French in Quebec)

Gender: M:F (50:50)

Age: 18-34 (33%); 35-54 (33%); 55+ (33%)

Quota: PBM[1] Users (60%); Non-users (40%)

[1] PBM=Plant Based Meat

FOCUS AND SCOPE

Defining the plant-based meat category: What's in the competitive set?

Included

Amy's
IMPOSSIBLE
MorningStar FARMS
BEYOND MEAT
VERY GOOD BUTCHERS
GOOD CATCH
gardein
zoglo's
Sol Cuisine
THE MEATLESS FARM Co
lightlife
Yves Veggie Cuisine
MODERN MEAT
Quorn
future farm
President's Choice
alpha FOODS
Garden Gourmet
RAISED & ROOTED
OZO
BOCA
NUGGS
FIELD ROAST
SWEET EARTH
hodo

Excluded

- Vegetarian & vegan prepared meals
- Plant-based beverages
- Plant-based snacks
- Dairy-free cheeses

The studies focus on users and non-users of plant-based products that closely simulate meat, poultry or fish :

- ✓ Ground round & crumbles
- ✓ Burger patties
- ✓ Sausages
- ✓ Nuggets
- ✓ Fish cakes & tuna
- ✓ etc.

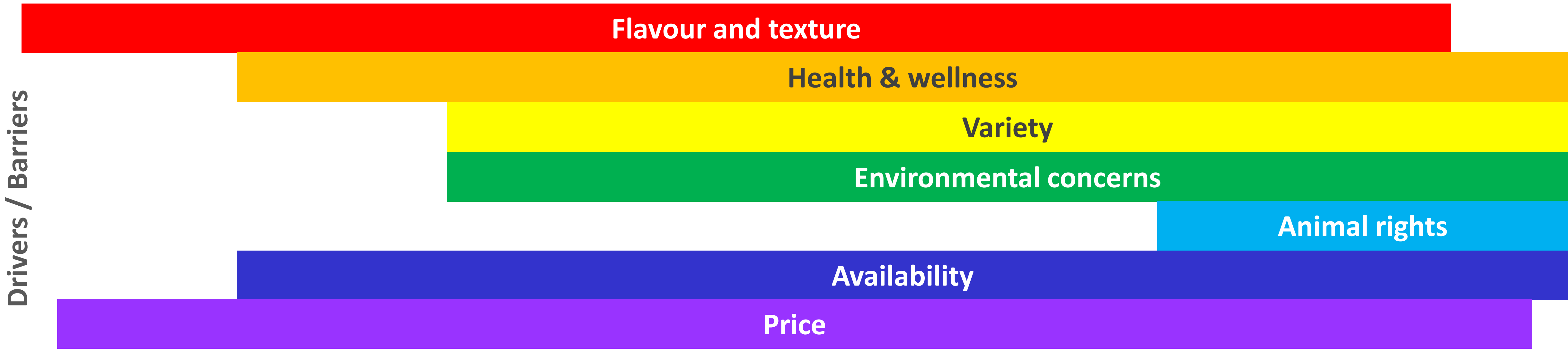
PBM CANADA 2021 | PBM USA 2021

A spectrum of potential plant-based meat consumers

caldo INCORPORATED

POTENTIAL DRIVERS AND BARRIERS OF CONSUMPTION

Confirmed meat eaters	Grudging abstainers	Semi-vegetarians/ Flexitarians	The health-conscious	The health nut	Vegetarians	Vegans
Fundamentally opposed to plant-based meat – essentially on principle	Forced to curtail meat consumption for health reasons	Curious Inclined toward plant-based meat on principle Interested in eating less meat for health reasons	Interested in eating less meat for health reasons	Opposed to meat consumption for health reasons, with few exceptions	Opposed to meat consumption on principle or for health reasons, but may occasionally make exceptions	Opposed on principle to consumption of meat or any organism other than plants



Beliefs and values that amplify or inhibit demand

BEHAVIOURAL DRIVERS & BARRIERS

- Plant-based meat products are too heavily processed
- Real meat is no worse for you than plant-based meat products
- Eating plant-based meat is better for the planet
- Meat production is a big contributor to global warming
- Plant-based meat products are too expensive
- I have a serious problem with the way farm animals are treated
- It’s healthier to eat less meat
- I love meat, but I want to eat less of it
- It’s important to adopt eating habits that are more sustainable
- I want food products that contain more natural ingredients
- I’m not sure how to cook plant-based meat products
- Plant-based meat is just a passing fad that won’t last
- Why eat fake meat when real meat is readily available?
- I don’t like foods that aren’t natural
- I’ve never had a veggie burger that tasted like real meat
- My friends make fun of people who eat plant-based meat
- I don’t believe you can replicate the taste and texture of real meat

Some product attributes and claims

- Taste
- Texture or ‘mouth-feel’
- Appearance
- Aroma when cooking
- Versatility
- Range / Variety
- All natural ingredients
- Nutritional information
- Value for money
- Portion size

- Protein content
- Saturated fat content
- Cholesterol content
- Salt content
- Environmentally friendly packaging
- No artificial flavours or colours
- Non GMO / organic
- Ethically-sourced ingredients
- Low environmental impact
- Ease of preparation

Brand associations

WHAT CONSUMER ASSOCIATE WITH THE BRANDS

Versatile

High quality

Healthy

Wholesome

Innovative

Expensive

Truly meaty

Nutritious

Exciting

Trendy

Reflects who I am

Popular

Nothing artificial

Over-processed

Great value for money

Unhealthy

Satisfying

Always available

Delicious

Everyday snack

Trusted brand

CANADA 2021 USA 2021

Draft Report Outline

ENVISAGED CONTENTS

1. Who is the plant-based meat consumer?
2. Consumer habits and preferences
3. Purchase triggers
4. Behavioural drivers and barriers
5. What affects the consumer experience?
6. How do consumers rate specific brands?
7. Observations and conclusions

Primary segmentations:

Region:
CA: West | ON | QC | Atlantic
US: Northeast | Midwest | South | West

Gender:
F | M

Age:
18-34 | 35-54 | 55+

Income:
Low | Medium | High

User class:
Heavy | Light | Non-user

CANADA 2021 | USA 2021

This study represents **outstanding value for money** as the cost is shared among multiple subscribers

caldo INCORPORATED

BENEFITS OF THIS SYNDICATED SURVEY

Rising consumer interest in a more plant-based diet is the precursor to a potentially seismic shift in eating habits. With a modest investment you will be able to…

- **Market better:**
  by understanding demand drivers and barriers
- **Position better:**
  by identifying market white space
- **Sell better:**
  by knowing where rival brands are stronger or weaker

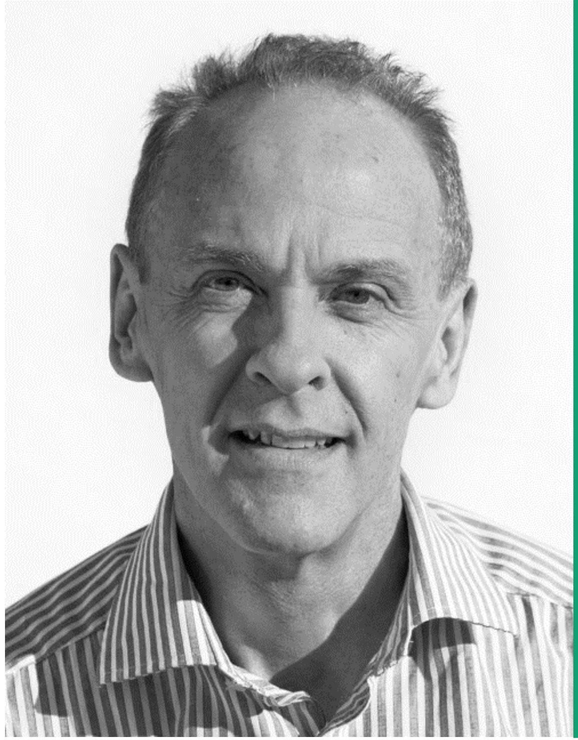
About the author:

AUTHOR

DOUG EATWELL

Founder: Caldo Inc.

www.linkedin.com/in/dougeatwell



With a passion for understanding stakeholder behaviour, and decades of experience in market research, business analysis and data science, Doug has established himself as a world-class CX specialist in the eyes of his peers and clients alike. He has spearheaded hundreds of projects for many well-known companies, including Conagra Brands, Siemens, Schneider Electric, ABB, Canon and Microsoft, to name only a few.