

Meat Substitute Brand Understanding



NATIONAL CATTLEMEN'S BEEF ASSOCIATION
CENTER FOR PUBLIC POLICY



In September of 2019, the National Cattlemen's Beef Association commissioned a survey to better understand consumer confusion relative to plant-based imitation meat.

The online, quantitative survey of over 1800 respondents was balanced to census (age, region and gender among 18-25 years of age) and included a variety of attitude, awareness, usage and self-defining exercises regarding plant-based substitutes. These questions were asked of all 1800+ respondents.



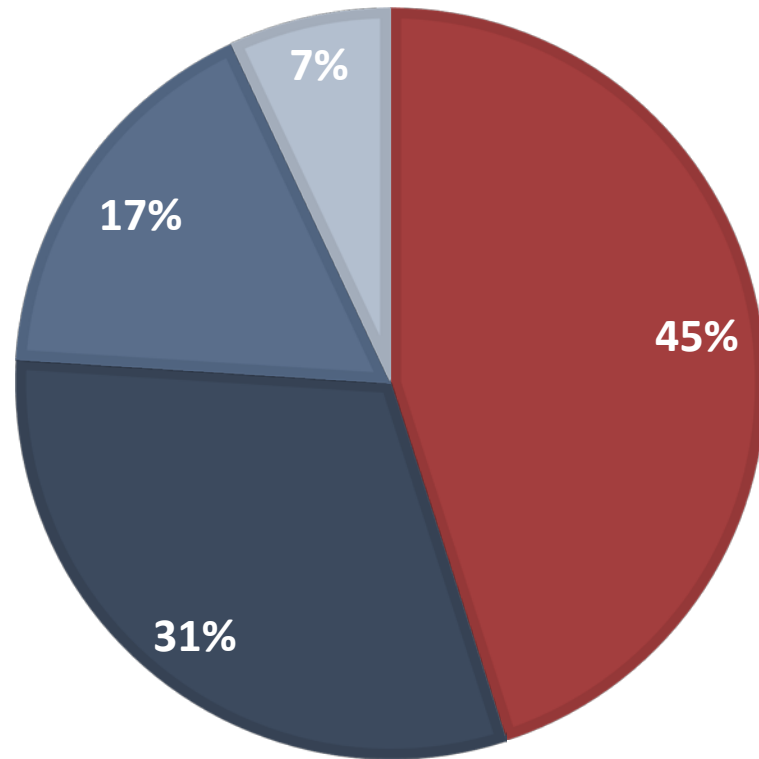
Defining Plant-Based

Preliminary usage/attitude questions of plant-based



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Less than half of consumers understand “plant-based beef” is entirely vegan.



- Is completely vegan, containing no meat or animal byproducts (eggs, dairy)
- Does not contain meat but may contain animal byproducts
- Can contain small amounts of meat, but is primarily plant-based
- Contains meat and there are no restrictions on the amount

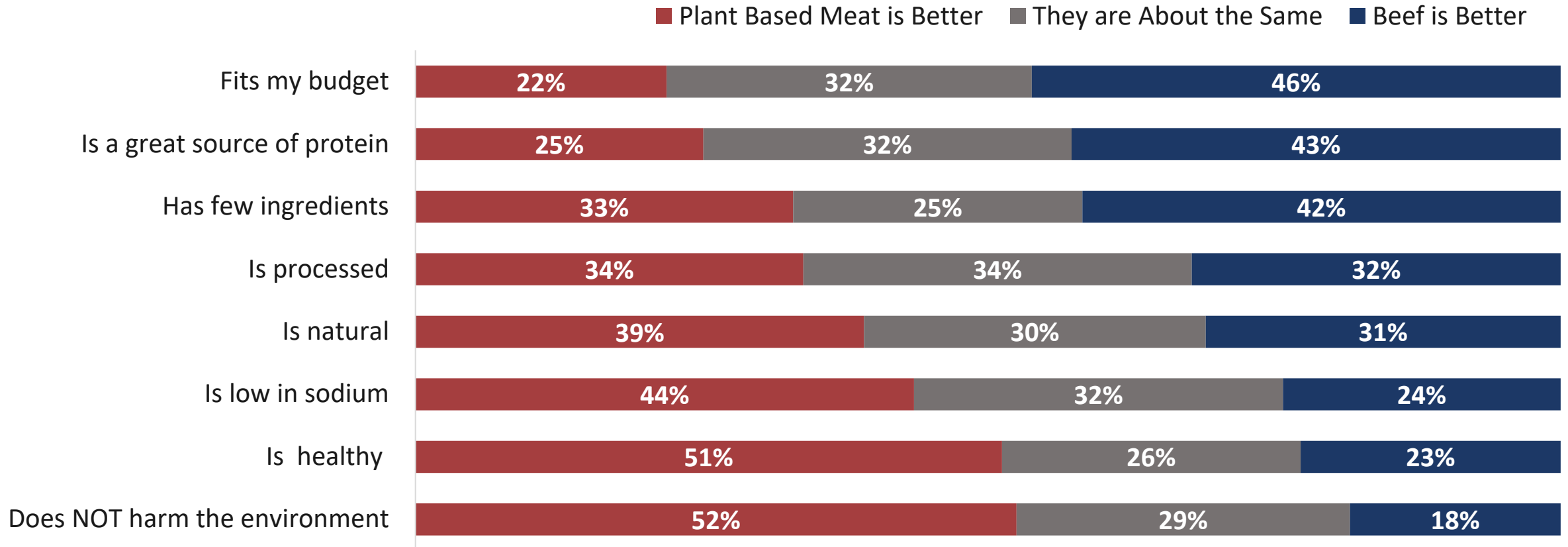
Plant-Based versus Beef

Perceptions of plant-based compared to beef



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Beef excels when it comes to price, protein, and minimal ingredients, while consumers feel plant-based meat performs better when it comes to the environment, health, and sodium.



Please review the list of items on the left, then indicate which is the best answer along the top when considering beef versus plant-based meat.



Plant-Based Product Label & Advertisement Perceptions



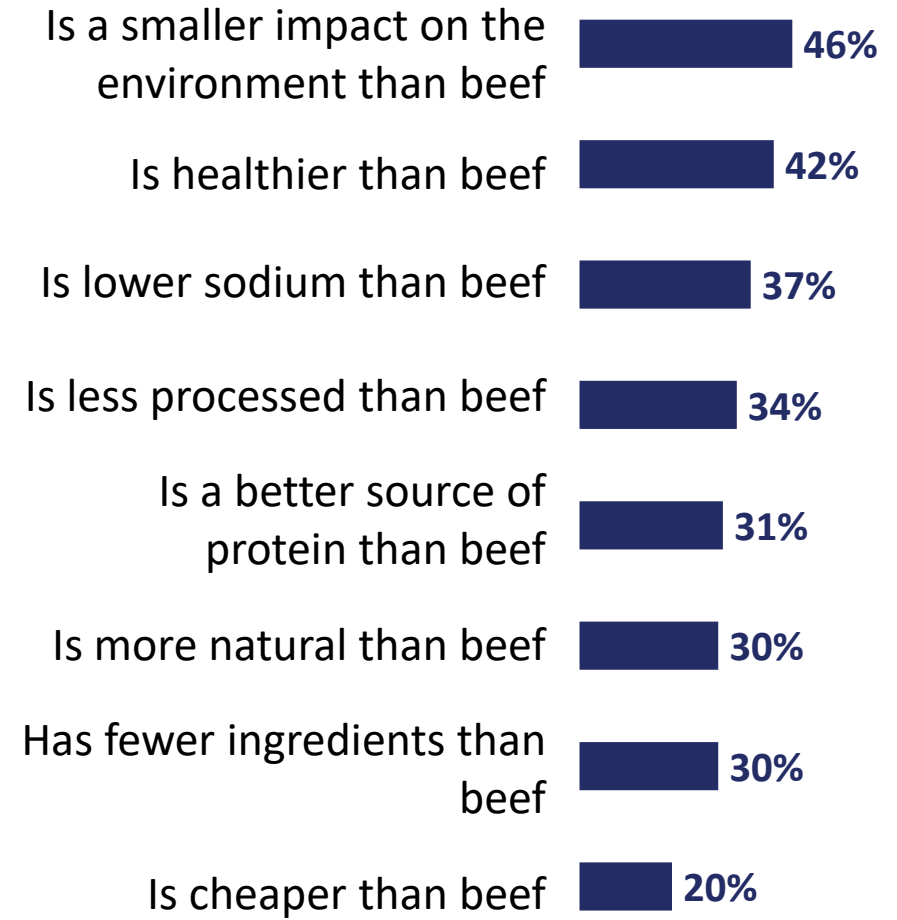
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After the initial section, respondents were then broken up into five evenly split monadic pathways to go through a brand evaluation exercise. Said another way, each brand was seen in isolation from one another among 350 individuals, so no two brands were seen by the same person.



Beyond Burger Results

- 39%** Is completely Vegan, containing no meat or animal by products (eggs, dairy)
- 29%** Does not contain Meat but may contain animal by products (eggs, dairy, etc.)
- 21%** Can contain small amounts of meat, but is primarily plant based
- 11%** Contains Meat and there are no restrictions on the amount



The overall packaging and protein content is appealing, but this concept was most confusing in whether or not there was meat present due to the “Even Meatier” callout.

What’s Most Confusing:

“Why is it even meatier if it doesn’t contain any meat?”

“Marbled juiciness doesn’t make sense to me.”

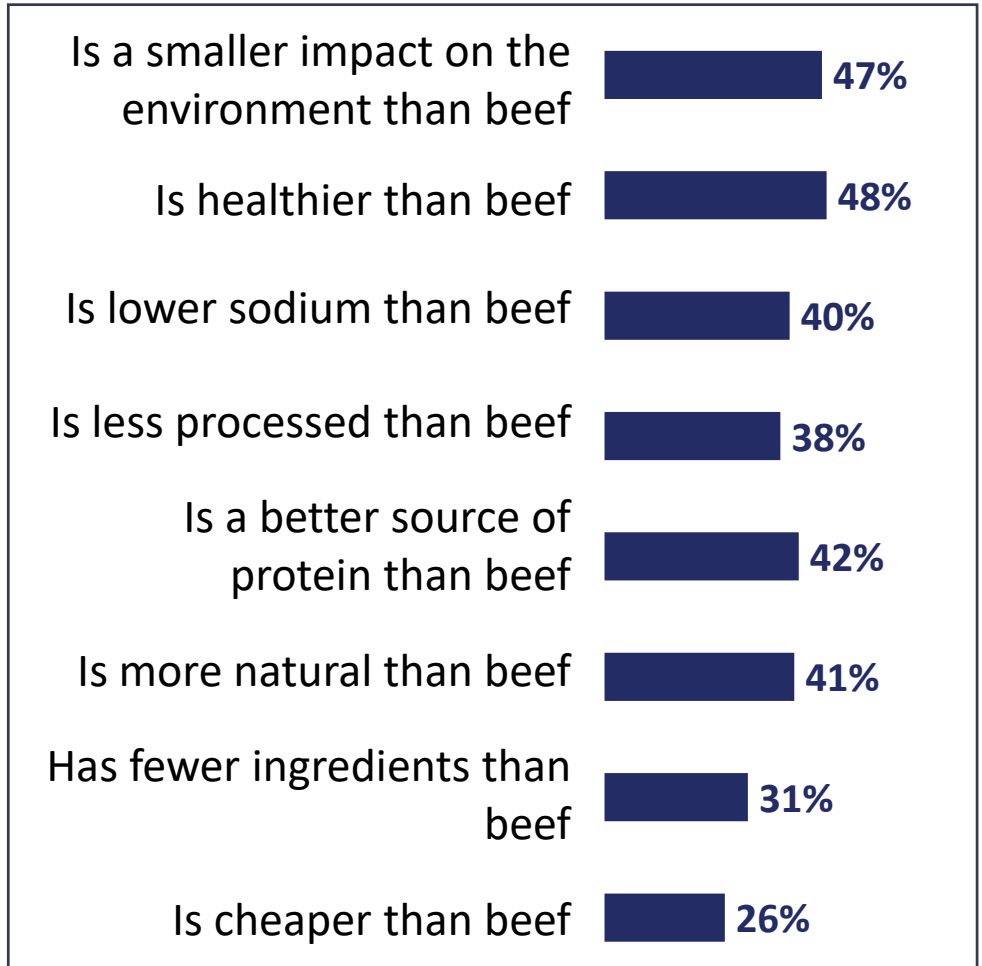
“Why is there a cow on the package?”

“What kind of meat is it exactly? Says it’s meatier but plant-based. Huh?”



Beyond Burger Ad Results

- 44%** Is completely Vegan, containing no meat or animal by products (eggs, dairy)
- 29%** Does not contain Meat but may contain animal by products (eggs, dairy, etc.)
- 15%** Can contain small amounts of meat, but is primarily plant based
- 12%** Contains Meat and there are no restrictions on the amount



Visuals really take over on this concept, so as a result, there is less focus on the ingredients and other content and more comments on how and why it looks like beef.

What's Most Confusing:

"It's called a burger, looks like a burger, but is not meat."

"It's confusing that the product greatly resembles beef."

"It seems like it's advertising beef."

"It says no soy/gluten. What is it made of?"

THE BEYOND BURGER®



**THE REVOLUTIONARY PLANT-BASED BURGER THAT
LOOKS, COOKS, AND SATISFIES LIKE BEEF.**

**A BURGER WITH
BENEFITS**



More Protein
Than Beef!



No Soy,
No Gluten



No
GMOs



YES
WAY!



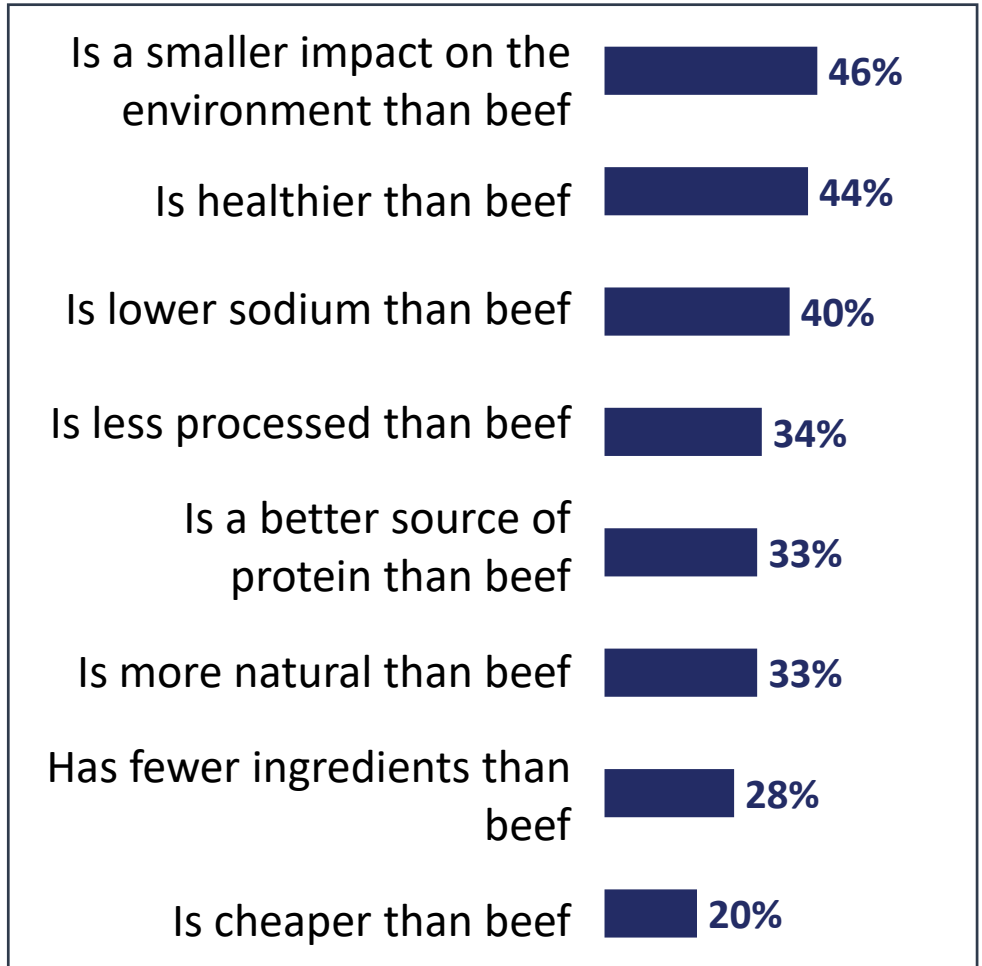
@BeyondMeat
#BeyondBurger
BeyondMeat.com



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Beyond Beef Results

- 41%** Is completely Vegan, containing no meat or animal by products (eggs, dairy)
- 27%** Does not contain Meat but may contain animal by products (eggs, dairy, etc.)
- 22%** Can contain small amounts of meat, but is primarily plant based
- 10%** Contains Meat and there are no restrictions on the amount



This concept is appealing with the most likeness to beef in look and packaging, but as a result, leads consumers to wonder if it includes beef and how it's made.

What's Most Confusing:

“What is it? Beef? Beef with fillers other than gluten/soy? A beef substitute?”

“It looks like meat and is packaged like meat.”

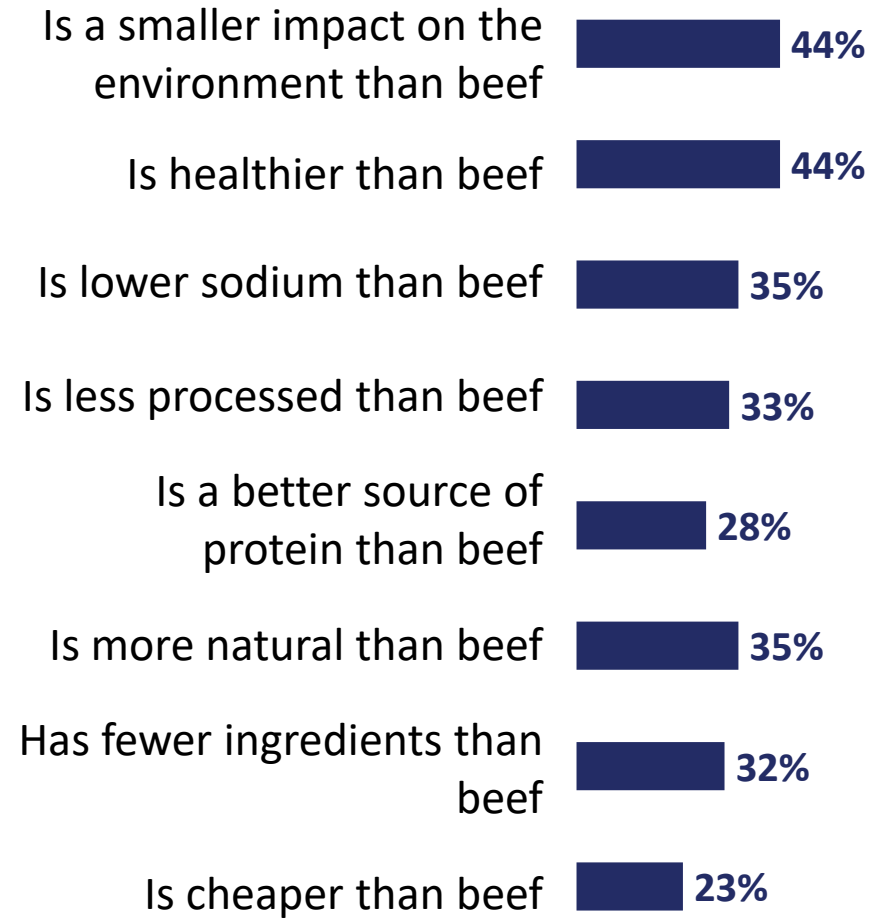
“It's says beef but beef comes from a cow not plants.”

“The fact that there's a cow on the package. Shouldn't it have a Ghostbusters-style slash through it?”



Impossible Ad Results

- 41%** Is completely Vegan, containing no meat or animal by products (eggs, dairy)
- 33%** Does not contain Meat but may contain animal by products (eggs, dairy, etc.)
- 16%** Can contain small amounts of meat, but is primarily plant based
- 10%** Contains Meat and there are no restrictions on the amount



The most simple concept, the message here is more clearly interpreted and there is less confusion on whether this has meat; the colorful and fresh imagery make it look appetizing.

What's Most Confusing:

“How do they get it to taste like beef?”

“It doesn't say what it is derived from.”

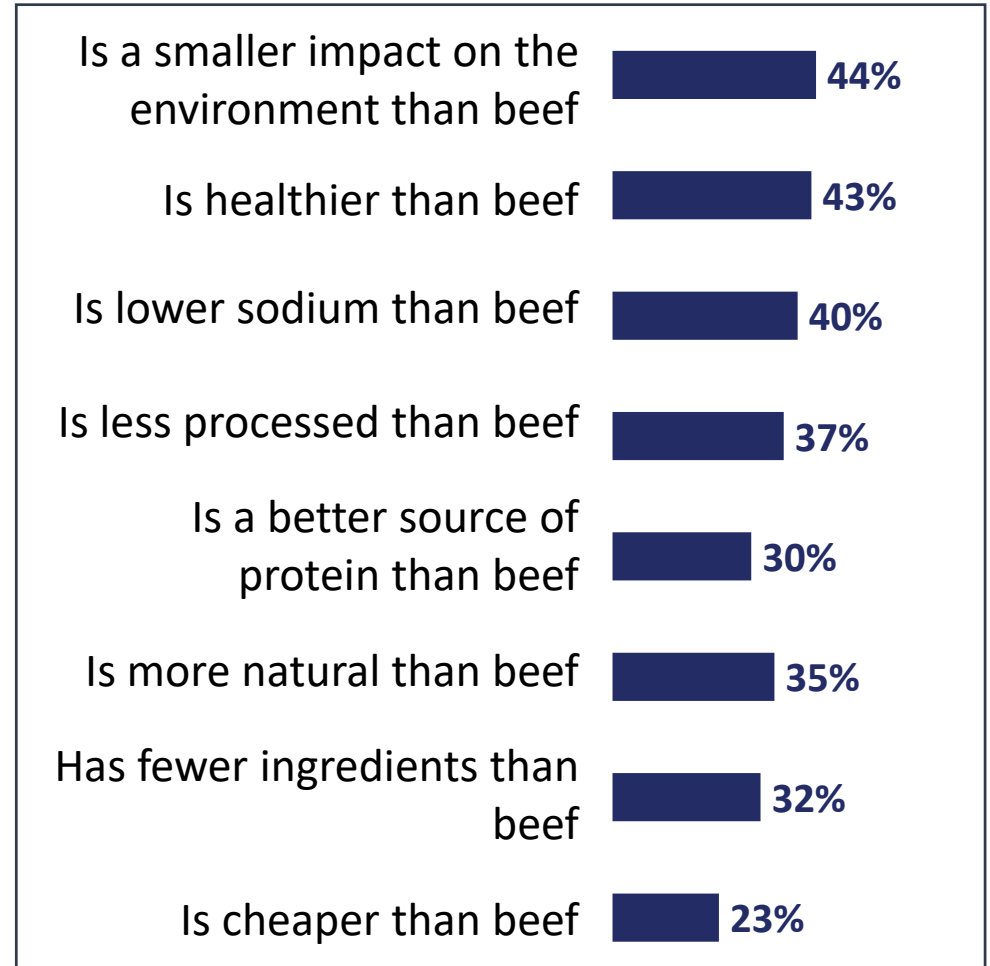
“The name Impossible.”

“Made from plants, tastes like beef.”



LightLife Gimme Lean Results

- 37%** Is completely Vegan, containing no meat or animal by products (eggs, dairy)
- 26%** Does not contain Meat but may contain animal by products (eggs, dairy, etc.)
- 22%** Can contain small amounts of meat, but is primarily plant based
- 15%** Contains Meat and there are no restrictions on the amount



Consumers were more focused on the appeal of this package and image of food, and as a result some missed this is plant-based—especially with the bold “Beef” label.

What’s Most Confusing:

“It says beef, so I’m not 100% sure it doesn’t include any beef.”

“The tube packaging makes me think it’s sausage even though it says beef.”

“I find the part where it says plant-based ground confusing.”

“It doesn’t clearly state that this is not beef.”



Why do consumers think plant-based is healthier?



Most mention the fat content, heart health or cholesterol, and overall health perceptions of vegetables or plants as reasons for finding plant-based healthier .

“Beef usually has more sodium and it's typically not organic or hormone-free, which makes it very unhealthy.”

“Too many processed chemicals and other additives in the beef. This is healthier since it doesn't contain that.”

“The product says no gmo, etc. This seems healthier than beef. Probably less processed and less harmful to the environment.”

You mentioned you slightly or strongly agree that this product is healthier than beef. Can you please explain why you think that? Be specific. n=799



“Made from plants, so it most likely is healthier!”

“A product made from plants most likely has more nutritional value than beef.”

“Anything that comes from the earth is healthier than things that have been processed.”

