

Australian consumer perceptions of plant-based meats and food labels: A national study

This study was conducted in February 2022, among consumers aged 18+ across Australia. It was an online survey conducted through Kantar's global consumer panel. The objective of this study was to understand Australian consumer attitudes and behaviours in relation to various food labels, specifically focusing on plant-based meat products. The total sample for the study was N=1014, with the sample splits aiming to be nationally representative. A summary of the findings in our study are as follows:

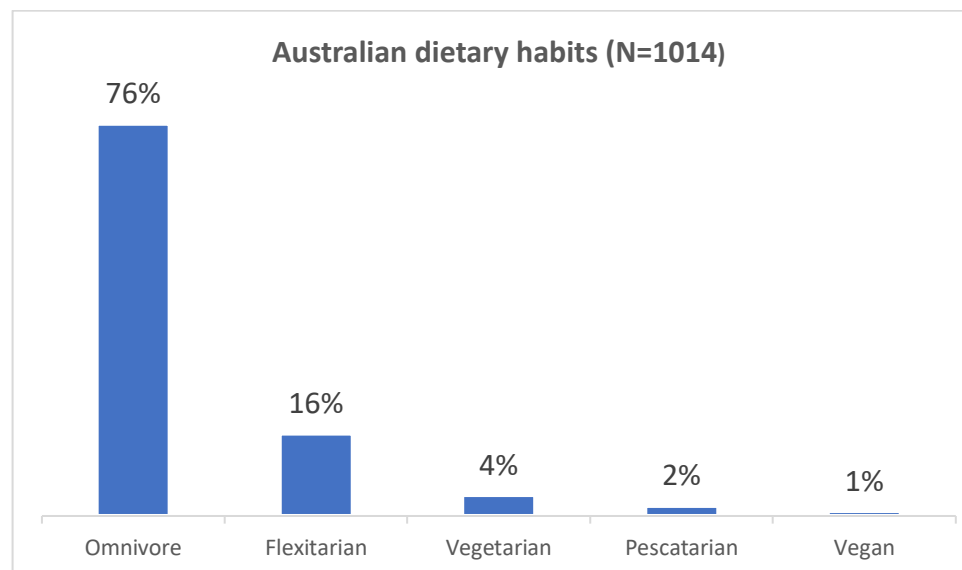
What are Australian dietary patterns currently like?

The majority of Australians (76%) identify as being omnivore i.e., defined as where one eats meat (chicken, pork, lamb and/or beef) three times a week or more.

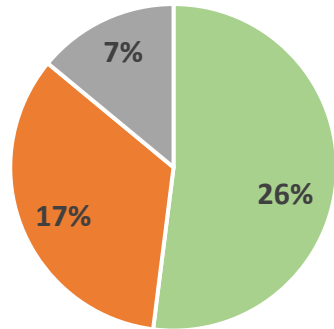
The next highest group identify as flexitarian (16%), defined as where one eats mostly plant-based foods and occasionally, animal products.

This is followed by plant-based consumers (5%) and pescatarians (2%).

Compared to national numbers, there are more people aged 18-35 years who identify as flexitarian (23%) and plant-based (11%).



What changes do Australians want to make to their current diets? (N=1014)



■ Eat more plant-based foods ■ Eat more fish/ seafood ■ Eat more meat

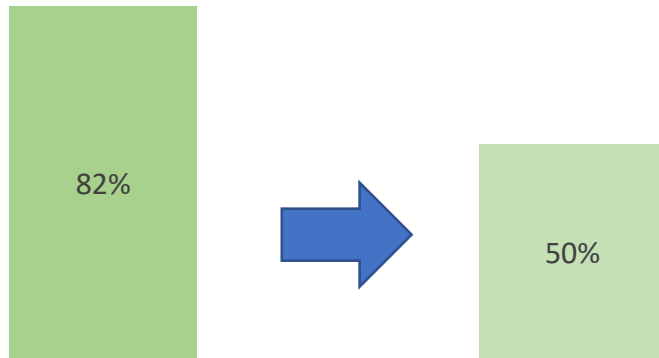
What dietary changes do Australians want to make?

Close to 50% indicate they are not looking to make changes to their current diet.

Close quarter mention (26%) say they would like to cut back on animal products and eat more plant-based foods. Another 17% say they would like to cut back on meat and consume more fish/seafood.

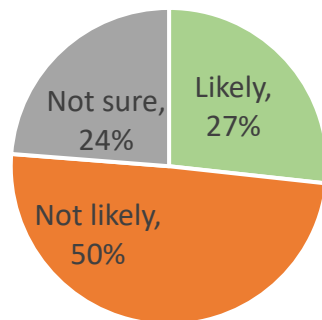
In total, 44% highlight they are looking to cut back on meat i.e., chicken, beef, lamb and/or pork products.

Awareness and trial of plant-based meats



I'm aware of plant-based meats (N=1014) I'm aware and have also tried plant-based meats (N=829)

Likely to substitute an animal-based meat product with a plant-based meat product in the next 12 months? (N=1014)



Awareness and consumption of plant-based meats

About 8 in 10 Australians indicate they have previously seen, heard or read about plant-based meats. Among those who are aware, half have tried plant-based meats at some point.

In terms of substituting animal-based meats for plant-based meats over the next 12 months, 27% claim they are likely, and a quarter (24%) say they are unsure at this stage.

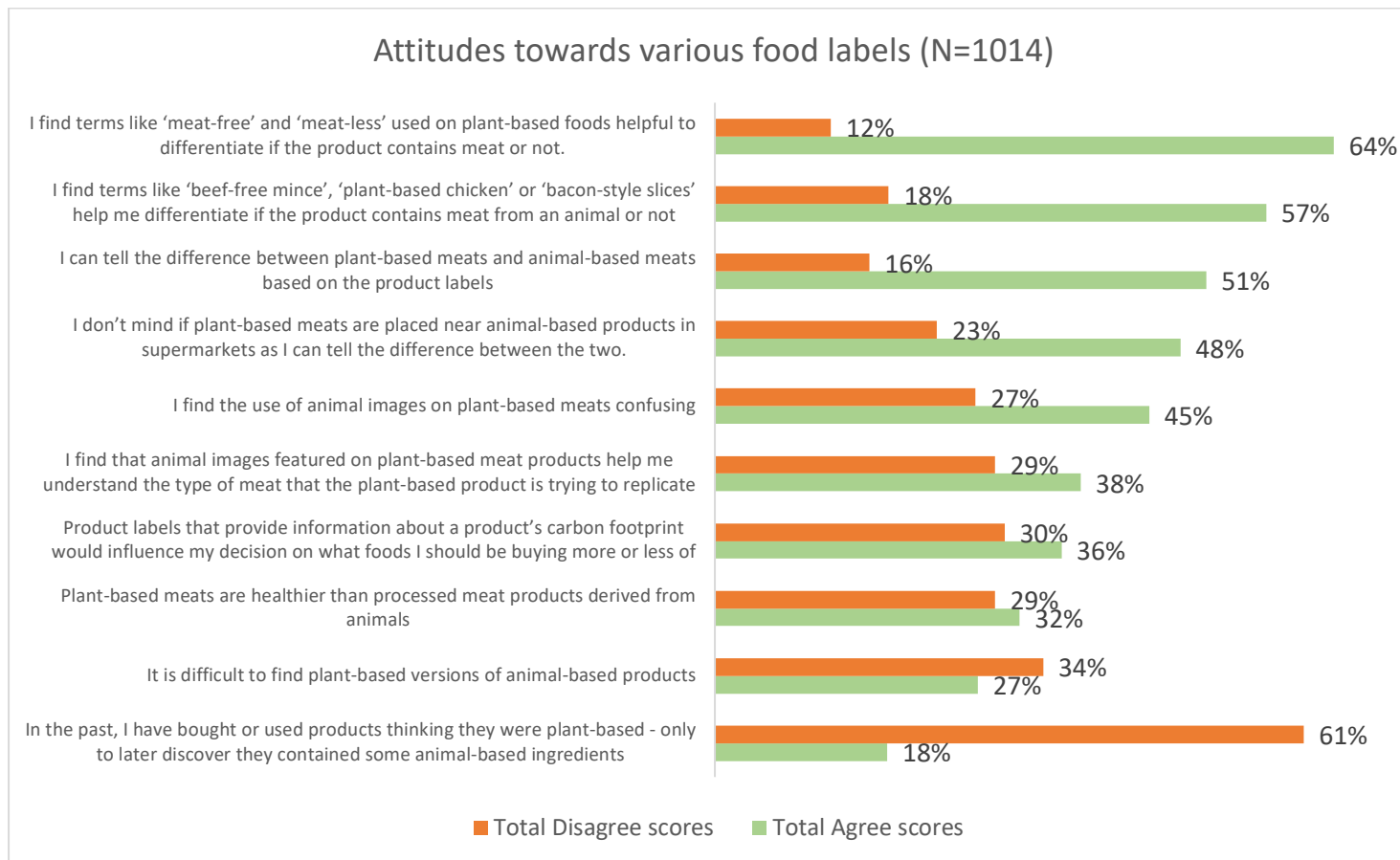
Among those who are likely to substitute animal-based meats for plant-based in the next 12 months:

- Compared to national numbers, a higher number of younger people - people under 55 years of age - say they are likely to substitute animal-based meat with plant-based meat products i.e., 36% of people aged 18-34 years and 30% of people aged 35-54 years.
- Those dwelling in metro regions (29%) are also more likely as compared to rural regions (20%).

Among those who are not likely to substitute animal-based meats for plant-based in the next 12 months:

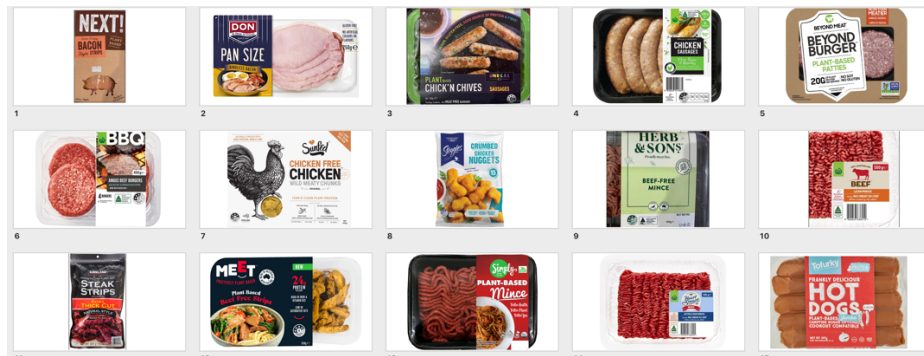
On the other end of the scale, the 'not likely' scores are generally higher among males (54%) and among those dwelling in QLD (56%).

Australian consumer attitudes towards various foods labels: This was asked in view of the Senate Inquiry into plant-based meats over concerns that consumers are confused by product labels, descriptions and images used by plant-based meats which mimic animal-based meat products. Our findings showed the majority spontaneously claim they can tell the difference between plant-based and animal-based meat products based on product labels and descriptors. The use of animal images on plant-based meat products, however, was potentially more confusing. Attitudinal scores towards various statements are as shown below:



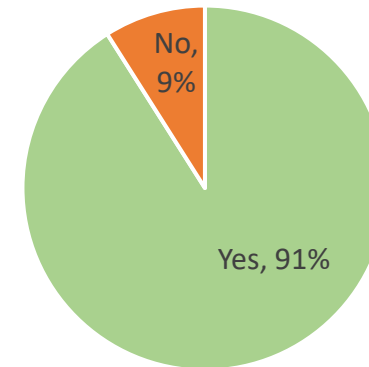
As part of our study, each respondent was shown a randomised set of 15 images of plant-based and animal-based meat products, from a total set of 60 images. For each image shown, the respondent was asked to indicate whether this product was a plant-based meat product; an animal-based product; or if were they unsure. On average, 8 out of 10 correctly identified the right product.

Sample shown below:

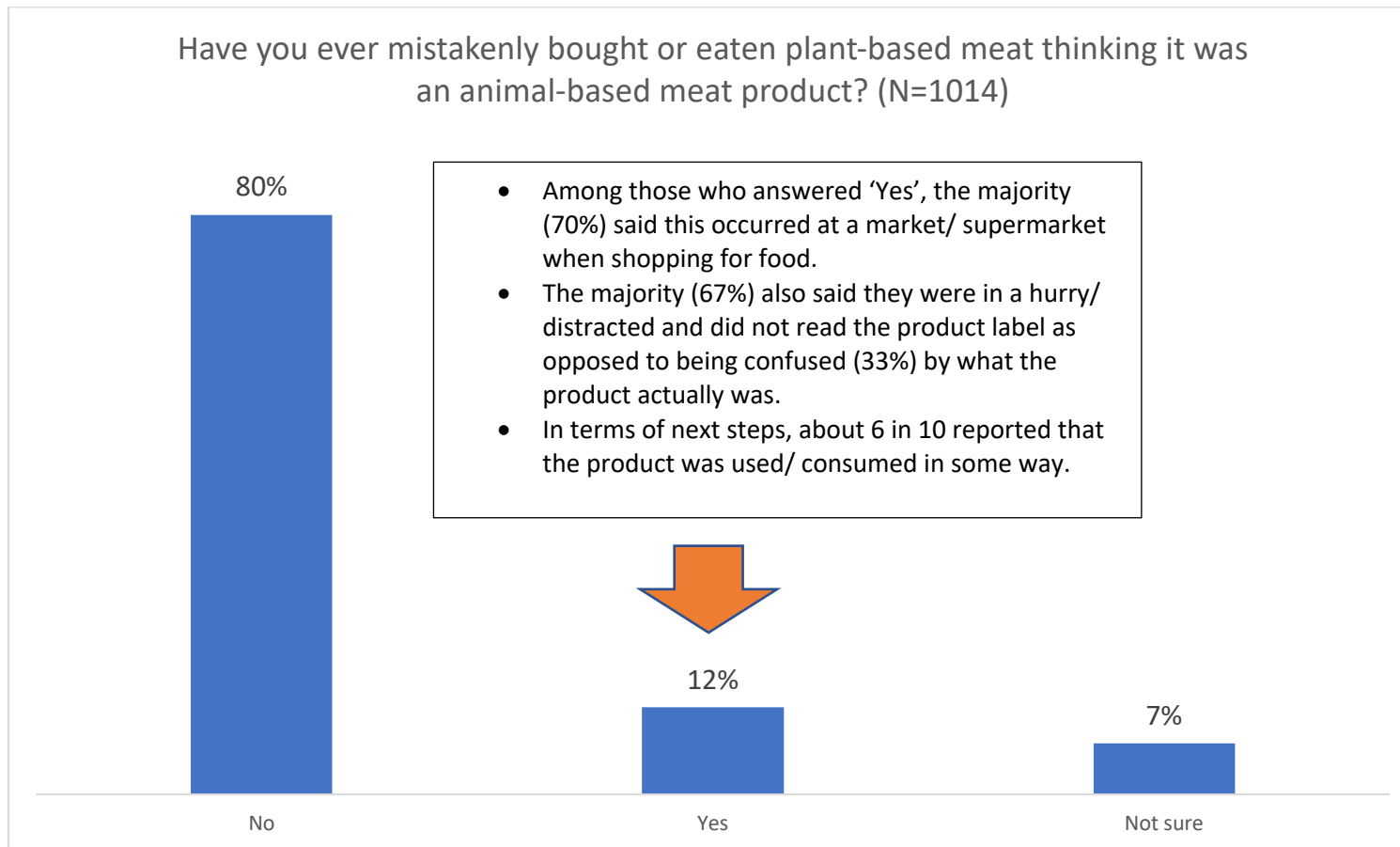


At the end of the exercise, respondents were also presented with this question – overall, did they feel they could tell the difference between plant-based and animal-based meats, based on the names, descriptions and images? **9 in 10 answered ‘Yes, they could tell the difference’.**

Can Australians tell the difference between plant-based and animal-based meat products? (N=1014)



As part of our survey – and in order to understand purchase history – we asked Australians if had ever mistakenly bought or eaten a plant-based meat product thinking it was animal-based meat? **8 in 10 answered 'No'**. Among the small number who answered 'Yes', the majority (67%) said this happened as a result of being in a hurry/being distracted and thus they did read the product label.



Key findings from our study are as follows:

- Although the majority of Australians identify as being omnivore (76%), more than a quarter indicate (26%) say they would like to cut back on animal products and eat more plant-based foods.
- About 8 in 10 Australians say they have previously seen, heard and/or read about plant-based meats, and half of those who are aware have tried plant-based meats at some point previously.
- In terms of substituting animal-based meats for plant-based meats over the next 12 months, a little more than quarter (27%) said they are likely to do so, and 24% being somewhat ambivalent. Compared to national numbers, a higher number of younger people say they are likely to substitute animal-based meat with plant-based meat products i.e., 36% of people aged 18-34 years and 30% of people aged 35-54 years say they are likely. Those dwelling in metro regions (29%) are also more likely as compared to rural regions (20%).
- When it comes to food labels, majority spontaneously indicate they can tell the difference between plant-based and animal-based meat products based on product labels. The use of animal images on plant-based meats is however potentially more confusing.
- Furthermore, when shown randomised images of both plant-based and animal-based meat products, 9 in 10 said that, overall, they can tell the difference between plant-based and animal-based meat products, based on names, descriptions and images.
- We also asked Australians if they had ever mistakenly bought or eaten a plant-based meat product thinking it was animal-based meat. 8 in 10 answered 'No'. Among those who answered 'Yes', the majority (70%) said this occurred at a market/ supermarket when shopping for food, and that they were in a hurry/ distracted and did not read the product label (67%) as opposed to being confused (33%) by what the product actually was.
- **In this regard, the findings from our study indicate the majority of Australians are not confused by food labels, and can clearly tell the difference between plant-based and animal-based meat products based on names, labels and product descriptions.**

Details relating to study sample characteristics (N=1014)

- 51% male; 48% female
- 73% urban; 27% rural
- 31% aged 18-35 years; 34% aged 35-54 years; 35% aged 55+ years
- 94% identified as having a diet comprising animal products (meat and/or seafood) and 6% identified as having a plant-based diet.