



## **The Plant-Based Plateau:**

Some Insights on U.S. Consumers and  
Suggestions for Animal Advocates.

Courtney Dillard and Zoe Griffiths

## Background

One of the most promising developments for farmed animal advocates in the past several decades has been the emergence of next-generation plant-based meat products. Because innovations in food technology have made it possible to closely mimic key features of conventional meat, such as appearance, taste, and mouthfeel, many in the space have considered these products a key step toward a plant-based future.<sup>1</sup> Hope has been particularly strong in the United States, where many of the products were launched, and over the past several years, market analyses have encouraged it. Most strikingly, consumer data from SPINS demonstrates a 74 percent growth in retail sales of plant-based meat in the United States from 2019 to 2021.<sup>2</sup>

But more recently, advocates have been disheartened by a number of prominent news stories pointing to evidence that this positive trend is not persisting. Such stories typically highlight Beyond Meat's plummeting stock price;<sup>3</sup> McDonald's decision to scrap its plans for a nationwide rollout of the McPlant;<sup>4</sup> JBS's move to close its U.S. plant-based meat division, Planterra Foods;<sup>5</sup> and a handful of somewhat murky but clearly lukewarm reports on the U.S. retail market.<sup>6</sup>

Many theories attempt to explain this apparent plateau in the plant-based meat industry. One theory suggests that confusion or misconceptions regarding the healthfulness of these products may be at play. The unfamiliar, long-named ingredients in some plant-based meat products have drawn particular attention. To some consumers, such ingredients indicate that a product is "unnatural" or highly processed. This has the potential to turn off some health-conscious consumers, who subsequently see traditional meat products as healthier or less processed because of their shorter, more familiar ingredient lists.<sup>7</sup>

The price of next-generation plant-based meats may also bear some responsibility for this plateau. Currently, the price of plant-based beef is roughly twice that of its animal-based counterpart, and people are even less likely to pay for premium-priced items today, with ever-increasing inflation rates impacting consumer purchasing habits.<sup>8</sup>

Other theories point to the overcrowded plant-based meat market, the failure of restaurants to keep plant-

based meat products on their menus after introducing them to their customers, and the lack of versatility among these products.<sup>9</sup>

A final theory centers on the concepts of novelty and hype cycles, suggesting that the novelty and initial hype of plant-based meats have waned as these products began to flood the market.<sup>10</sup> The theory of hype cycles predicts such a decline. As the originality of these products subsides, any limitations regarding taste, texture, and price become more apparent, and support for the plant-based meat industry drops.<sup>11</sup>

## Purpose of This Research

Given the plant-based meat industry's apparent stagnation and the wide range of theories regarding the cause, our research sought to explore and understand this phenomenon. Specifically, we aimed to conduct our own investigations from within farmed animal advocacy and offer responses that center the potential of our movement.

## Key Research Details

### Areas of Inquiry

The following questions guided our research:

1. What were consumers' main motivations for trying next-generation plant-based meats?
2. How was their first experience with these products, and did they intend to consume them or similar products in the future after their first trial?
3. What were participants' main reasons for not incorporating these products into their diets on a regular basis?

### Methods

We employed a mixed-methods approach for this project, examining consumer experiences, intentions, and behaviors through both macro and micro lenses. We began by deploying a survey to people who had tried at least one next-generation plant-based alternative, and then we facilitated four focus groups with recent consumers.

### Survey

We conducted a survey of U.S. residents who had tried next-generation plant-based meat products and

garnered 522 responses. The survey was deployed through the survey company Cint and was in the field from August 29 to September 6, 2022. Data was collected and analyzed in Qualtrics.

### **Focus Groups**

We facilitated four focus groups between October 17 and October 19, 2022, with a total of 20 participants. Participants were recruited through Respondent, an online recruitment tool for researchers, and were all U.S. residents over the age of 18. The purpose of the focus groups was to gain a deeper understanding of a particular type of consumer. To this end, potential participants were screened to have (a) tried next-generation plant-based meats, (b) enjoyed their experience with these products, and (c) failed to substitute these plant-based meats for their animal-based counterparts in their diets. Basic qualitative analysis of each focus group transcript was performed using Taguette, a research platform that allows for the systematic highlighting and tagging of themes in text.

### **Key Findings**

#### **The main motivations for trying next-generation plant-based meats are health and curiosity regarding a new product.**

In our survey 34 percent of respondents indicated that their perception of a product as a healthier option was the main reason they had decided to try it, while 33 percent noted that they had tried a product because it was new and interesting. Fewer than 10 percent of respondents said they had been motivated by a product's sustainability or potential to reduce animal suffering.

Our focus groups gave us the opportunity to probe these motivations more thoroughly. Several participants noted health as a key reason for their initial trial, and some relayed a general impression that the products were healthier: "I wanted to try to eat healthier ... so I said, 'Let me try something new'"; "Subconsciously I feel like I'm making a healthier decision." Others sought the products out to aid them in achieving specific health goals: "I just needed a better way to get an adequate amount of protein into my diet. And so I brought in the meat substitutes"; "I'm trying to work on my gut health ... so that's why I'm trying more plant-based protein options." Additionally, no participant mentioned being concerned about the processed nature of these

products in their early considerations.

Digging deeper into the role of novelty as a motivator for first trials, we found some interesting distinctions. Several respondents noted that they had heard a lot about the products before trying them and that the similarity to meat piqued their curiosity: "I saw some people try the different kinds of alternatives on YouTube and stuff. So that intrigued me as well because they made it seem that it was pretty good"; "Once I heard about it, it was, like, everywhere after that. ... And my curiosity grew and grew and grew and grew until I decided to try it."

Importantly, some respondents noted that curiosity paired with a convenient context had created a ripe opportunity for trying the product. In some cases that convenience meant the product was readily available: "I made it a few times for my partner, because I'd cook her lunch and stuff. She had them around, and at one point, I just felt like trying it." In other cases it meant there had been no cost to the respondent: "The first time that I tried it, I was at a restaurant and a friend of mine was buying lunch, and she really liked it. So that's what she bought us"; "I tried it at Costco ... where ladies hand out things."

#### **Many people had a positive experience when trying the product.**

Generally, survey respondents had positive experiences when trying next-generation plant-based meat products. A clear majority (73 percent) reported that they had been extremely satisfied or satisfied with the taste of a product. In contrast, only 11 percent of respondents reported being extremely dissatisfied or dissatisfied with the taste.

Given that our screening questions for the focus groups were designed to help us better understand those who had enjoyed these products but failed to replace animal-based meat products with them, we were not surprised that participants' experiences with these products had been overwhelmingly positive. Indeed, 19 of our 20 focus group members reported an initial experience with next-generation plant-based meat products that ranged from neutral to positive.

A common reaction among our focus group participants was *surprise* at how good these next-generation plant-based products tasted, generally exceeding

their (often low) expectations. One participant noted that she hadn't expected "to like something like that" but had been "kind of blown away by the texture and taste." Another participant, who described himself as a "meat person," had a similar experience: "It just kind of shocked me. ... It really did taste like meat."

Likelihood to eat these products again frequently emerged among both survey and focus group participants. The majority of survey respondents (71 percent) indicated that they would likely eat next-generation plant-based meat products again. This likelihood was even higher among focus group participants, at 95 percent, but this was expected given that we had designed our screening questions to help us gain insight into those who intended to eat these products again but had not actually incorporated them into their diets.

**While many participants indicated integrating the products into their diets, others did not, largely citing product attributes.**

Although our survey found that 60 percent of respondents were including plant-based meat products in their diets and 56 percent reported eating them on a regular basis, 40 percent of respondents who had tried such products were not eating them on a regular basis. When asked why, 32 percent cited taste as their main reason, while 29 percent indicated cost. Regarding taste, comments in the open-ended question included "this does not taste like meat at all," "I think natural meat tastes better," and "they don't taste like the real thing." Other respondents focused on price, relaying sentiments such as "too expensive" and "I'm on a fixed income."

During the focus group sessions, taste and cost also emerged as reasons why participants had not incorporated these products into their diets on a regular basis. Responses from some group members regarding taste revealed an interesting distinction. While almost everyone indicated a positive response for the taste of the product they had tried, some people said they did not feel the taste was good enough to buy the product regularly. Specifically, and in line with some of the open-ended responses to the survey, products seemed to fall short when compared with conventional meat: "While it was still tasty, it was not hitting the satisfaction level"; "If I looked at the overall picture and said this is superior in every way and equal in taste, then I might be willing to go for it as a replacement."

Some participants seemed to set an even higher taste standard for these products to replace conventional meat in their diets: "I don't think I would replace as of now, maybe in the future if they get even better"; "I think it's impressive how similar it tastes and feels for how new the product is. So 10–20 years from now, it's only going to get better."

Interestingly, for some focus group participants, curiosity regarding a product made cost a less important consideration when first trying the product: "It was a little bit more expensive, but I didn't care at the time because I was just... You know, I had so much curiosity that I just wanted to try it." That said, for several participants price was a factor in their decisions not to eat the products on a regular basis: "I feel they're a little bit expensive when compared to, you know, the regular product"; "I found that it's costlier than the real meat. So that was kind of like a negative thing for me"; "When it becomes ... a cost inconvenience, we're not gonna do it."

**Other critical factors may influence people's decisions not to eat plant-based meat products on a regular basis.**

Some focus group participants never saw plant-based meats as substitutes for traditional meat; they saw them only as additions to their existing diets. "When it comes to burgers ... it's just a different category," said one participant. "I think for me, it wasn't a replacement ... at any point." Another participant echoed this sentiment: "I never saw this as a replacement. I just thought it was something else to eat." These perspectives align with our survey results. We found that 39 percent of respondents added plant-based meat products to their diets after trying them, while 21 percent of participants replaced certain traditional meat products with plant-based meat products after trying them. While other factors certainly contribute to the discrepancy between these figures, the view that plant-based meat products are meant to be dietary additions, not substitutions, likely plays a part.

Familiarity may also influence consumers' decisions not to incorporate plant-based meats into their diets more regularly. In the survey, 28 percent of respondents said they did not eat plant-based meats on a regular basis because they preferred more familiar meat products. This aligns with our focus group results as well. Many

participants cited unfamiliarity with how to cook these items or incorporate them into meals as a reason for not eating them more regularly: “We were not open to buying alternative meat products just [because] we don’t want to mess up our food, because we don’t know how to handle it yet and how to cook it well.” Another participant had similar thoughts: “I guess being familiar with food, you know, it’s especially [important] for somebody that’s busy, and sometimes you just want to cook what you know and cook it quick.”

In a similar vein, some participants noted that plant-based meat products were culturally unfamiliar, making incorporating them into their diets more difficult. One participant explained: “I also am of South American descent, and our culture is very meat-based. So it’s very hard to, like, let go of those ... traditional habits.” Another participant’s response highlighted both the cultural and the practical aspects of familiarity: “Culturally, like when I start cooking with chicken ... I know how it would taste and what to do with it, but I’m not really sure what to do with ... [products] like Gardein chicken.”

An additional observation related to familiarity concerns the number of plant-based meat products consumers see on grocery store shelves. One participant explained that they would “probably include them more in [their] diet” if there were “a lot more when you walk through the store,” indicating that plant-based meats currently seem unfamiliar because they are still relatively scarce in many grocery stores.

A final element that emerged in our research is the role that other people play in an individual’s decision to consume plant-based meat products on a regular basis. While others can act as facilitators in the decision to try and regularly buy these products, they can also act as barriers. In an open-ended question about why survey respondents were not eating these products regularly, comments included “I had to choose between the two, and my family chose meat” and “my family prefers actual meat, and I don’t want to cook multiple meals.” Our focus group sessions yielded similar feedback: “I used to buy it because I used to live with my ex-girlfriend and she liked it, so we ate it. ... My wife now doesn’t [eat plant-based alternatives], so we don’t buy them”; “I don’t know that the other people that I’m cooking for would necessarily appreciate me kind of pushing it by cooking it”; “If I was to consider my significant other, I

don’t think I would introduce it just because I feel like he already eats so much processed foods.”

## Potential Next Steps

Several of our findings suggest points of focus that leaders in the plant-based industry are already aware of. Many participants in our research noted positive first experiences with next-generation plant-based meats and an initial lack of strong concern about price, particularly when purchasing from a grocery store. But they seem to have higher standards and be more cost conscious when deciding whether to eat these products on a regular basis.

Although animal advocates are likely unable to play a significant role in addressing taste and price concerns, several avenues in our work could lead to a positive impact.

## Spreading the Word

While venture capital and media interest in the novelty of these products when they were first launched created a lot of opportunity for product promotion through splashy advertisements and earned media, a different approach must now be taken. Our focus group research indicates that one person interested in the products can influence others around them. Animal advocates are well suited to play that role, and as the movement continues to grow in the United States, we will have more and more people to promote these products in their networks. A community-ambassador approach that centers product advocates in their social networks may work well as a long-term strategy.

## Broadening the Reasons for Purchase

Early messaging likely required a focus on products to build curiosity and encourage first purchases, but the next wave of messaging will need to present stronger, more enduring reasons to build long-term consumer commitment. Animal advocates could coordinate with plant-based companies, creating strategic campaigns to promote products as both ethical and delicious. One approach could be for animal protection groups to contrast the production processes of conventional meat with those of plant-based alternatives while plant-based companies highlight various benefits of their products, including that they promote kindness to animals.

Additionally, advocacy groups could help pilot advertisements by plant-based companies that subtly point to the products as a way to eat with animals in mind. If consumers choose a product from that perspective, they may be more inclined to see it as a consistent replacement rather than a one-off addition.

### **Responding to the Obstacle of Habit and Familiarity**

Our research aligns with other work that suggests habit can be a major obstacle for people regarding meat. As we know, animal meat plays a role in people’s everyday lives; most Americans grew up with it, and many know how to cook with it. Advocates can help combat unfamiliarity of plant-based alternatives, particularly in terms of cooking with such products. Advocacy groups could explore an approach similar to that of Forward Food with foodservice providers and restaurants. Specifically, they could pilot a program of peer-based groups who give cooking demonstrations with these products in their communities. Advocates could also create video content teaching others how to integrate plant-based meats into familiar recipes. Advocates involved in vegan mentor programs could encourage mentors to teach their mentees how to cook with these products.

Additionally, given how difficult overcoming this bias toward the familiar can be, focusing on very young consumers who have yet to develop ingrained dietary habits may make sense. Since research suggests youth have a greater concern for animal welfare, including farmed animal welfare, the movement could be more intentional in targeting young people, encouraging them to choose plant-based alternatives and request them as household purchases. In that vein, youth may become effective ambassadors for the social-network approach to promoting plant-based eating.



## Endnotes

1. Good Food Institute, *Plant-Based Protein: State of the Industry Report* (Washington, DC: Good Food Institute, 2022), <https://gfi.org/resource/plant-based-meat-eggs-and-dairy-state-of-the-industry-report/>; Lewis Bollard, "Lessons Learned in Farm Animal Welfare" (lecture, Effective Altruism Global, San Francisco, June 2019), <https://www.effectivealtruism.org/articles/lewis-bollard-lessons-learned-in-farm-animal-welfare>.
  2. "2021 U.S. Retail Sales Data for the Plant-Based Foods Industry," Plant Based Foods Association, June 15, 2022, <https://www.plantbasedfoods.org/2021-u-s-retail-sales-data-for-the-plant-based-foods-industry/>.
  3. Julie Creswell, "Beyond Meat Is Struggling, and the Plant-Based Meat Industry Worries," *New York Times*, November 21, 2022, <https://www.nytimes.com/2022/11/21/business/beyond-meat-industry.html>.
  4. Amelia Lucas, "Beyond Meat Stock Falls After Conclusion of McDonald's McPlant Test," CNBC, July 29, 2022, <https://www.cnbc.com/2022/07/28/beyond-meat-stock-falls-after-conclusion-of-mcdonalds-mcplant-test.html>.
  5. Elaine Watson, "JBS Pulls Plug on Planterra Foods US Plant-Based Meat Operation," Food Navigator, October 2, 2022, <https://www.foodnavigator-usa.com/Article/2022/10/02/JBS-pulls-plug-on-Planterra-Foods-US-plant-based-meat-operation>.
  6. Spencer Young et al., "Plant Based Meat Sales Slowing," *Deloitte Insights*, September 27, 2022, <https://www2.deloitte.com/us/en/insights/industry/retail-distribution/future-of-fresh-food-sales/plant-based-meat-sales.html>; John Fiorillo, "US Retail Sales of Plant-Based Meat Products Slip in March," IntraFish, April 19, 2022, <https://www.intrafish.com/markets/us-retail-sales-of-plant-based-meat-products-slip-in-march/2-1-1202594>; Elaine Watson, "Big Meat Retrenches as Meat Alternatives Lose Their Luster," Food Navigator, October 13, 2022, <https://www.foodnavigator-usa.com/Article/2022/10/13/Big-Meat-retrenches-as-meat-alternatives-lose-their-luster>.
  7. Emiko Terazono and Judith Evans, "Has the Appetite for Plant-Based Meat Already Peaked?," *Financial Times*, January 27, 2022, <https://www.ft.com/content/996330d5-5ffc-4f35-b5f8-a18848433966>.
  8. Michal Klar, "Plant-Based Meat Sales—What's Happening?," Future Food Now, November 2, 2022, <https://futurefoodnow.substack.com/p/plant-based-meat-sales-whats-happening>.
  9. Laura Reiley, "Alt-Meat Fever Has Cooled. Here's Why," *Washington Post*, November 12, 2022, <https://www.washingtonpost.com/business/2022/11/12/plant-based-meat-market/#VZUFFVETYFFQLF3V3LZXRUUAOP4-1>.
  10. Christie Lagally, "It's Time for a Light Bulb Moment in the Dimming Alt-Meat Market!," Medium, November 16, 2022, <https://rebellyous-foods.medium.com/its-time-for-a-light-bulb-moment-in-the-dimming-alt-meat-market-965fe6d-b3cd5>.
  11. Terazono and Evans, "Has the Appetite for Plant-Based Meat Already Peaked?"
-