



'PLANT-BASED' VS 'VEGAN'

UNDERSTANDING CONSUMER PERCEPTIONS OF FOOD LABELLING-TERMS



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1. INTRODUCTION

The words we use matter – especially when it comes to food products that consumers choose every day. Labels should be familiar and easy to understand. Do consumers prefer products which are labelled ‘vegan’ or ‘plant-based’? Do they understand what ‘dairy-free’ or ‘cheesy’ means? A wide range of words is used to describe plant-based food products, but for many consumers the meanings of these words are unclear. Still, the labels on food products play a big role – especially for consumers who follow vegan, vegetarian, or flexitarian diets. Vegans, for example, only eat food which does not contain animal-based ingredients, vegetarians only consume food products that do not contain animal meat, and flexitarians strive to reduce their meat consumption. If they are not familiar with a term that appears on food packaging, these consumers would rather not buy it and might instead opt for a product with a descriptor with which they are familiar. This is why it is of such importance to label food products according to the understanding of their target audience. So, what is the current understanding of consumers regarding food-labelling terms?

This report offers insights into consumer knowledge about plant-based terminology in the UK as well as in the US, with a deep dive into the way different dietary groups understand key terms. We’ll take a look at the following terms:



Vegan: Does not contain any ingredients of animal origin



Vegetarian: Excludes animal-meat but might include dairy and eggs



Plant-based: Does not contain any ingredients of animal origin



Meat-free: Excludes meat but might contain dairy/eggs



Dairy-free: Excludes dairy/eggs but might contain meat



Meaty: Contains meat (plant-based or animal-derived) and might contain dairy/eggs.



Cheesy: Contains cheese (plant-based or animal-derived) and might contain animal-meat.

2. ABOUT THE SURVEY

This online survey was conducted in the UK and the US in October 2021. It was completed by respondents who were recruited via the Attest online platform, with a total of 200 participants in each country. The interviewees were asked for their feedback on certain words that are typically used to describe food (e.g. 'vegan', 'plant-based', etc.).

We collected data in relation to several demographic categories, including age, gender, and educational background, setting quotas for age, gender, and dietary habits in order to ensure that the sample was representative of the general population and equally distributed with respect to these variables. The sample consisted of people who describe themselves as 'flexitarian', 'vegetarian', or 'vegan' (see chart 1).

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Consumers understanding
of plant-based terminology



Online survey conducted
in October 2021



200 participants in
each country



UK



USA



51% female respondents
49% male respondents



Flexitarians
Vegetarians
Vegans



3. EXECUTIVE SUMMARY

Nowadays, consumers have access to a wide selection of all kinds of plant-based food products to choose from in supermarkets. But their comprehension of the terminology that food producers use for their products seems to vary.

In 2021, ProVeg conducted an online survey with the goal of finding out the level of consumers' understanding of the terms used to describe food products in the UK and the US.

A very good understanding of 'vegan'

Our survey indicated that the majority of respondents had an excellent understanding of the term 'vegan', with 69.4% of UK consumers and 61.3% of US consumers choosing the correct definition, and saying that they thought these food products do not contain any meat, dairy or eggs. Even so, more clarification and education is needed around the term. ProVeg highly recommends highlighting the exclusion of dairy/eggs from these products.

Confusion around 'vegetarian' and 'plant-based'

About half of the consumers surveyed (50.3% in the UK and 49.2% in the US) understood the term 'plant-based' correctly. Some consumers (17% in the UK and 26.1% in the US) were confused about whether 'plant-based' food products contain dairy/eggs. The same went for the term 'vegetarian', with only 47% of consumers in the UK and 37.2% of consumers in the US understanding the term 'vegetarian' correctly. Results from this survey indicate that food producers need to offer a clearer description of these terms, giving information on dairy/egg content in particular. ProVeg recommends the use of the V-label in addition to these two terms.

Only use 'dairy-free' and 'meat-free'/'meatless' when accompanied by to other descriptors

72.6% of consumers in the UK and 75.4% of consumers in the US understood that a 'dairy-free' food product does not contain any dairy. Still, this term left consumers unclear about the product's meat content.

On the other hand, 74.9% of UK consumers and 76.8% of US consumers understood that a 'meat-free'/'meatless' food product does not contain any meat. This share of respondents, on the other hand, said that the dairy/egg content of the product remains unclear.

ProVeg suggests that food producers should always add an additional explanation when using 'dairy-free' or 'meat-free'/'meatless' to make it clear if the product contains any meat or dairy/eggs.

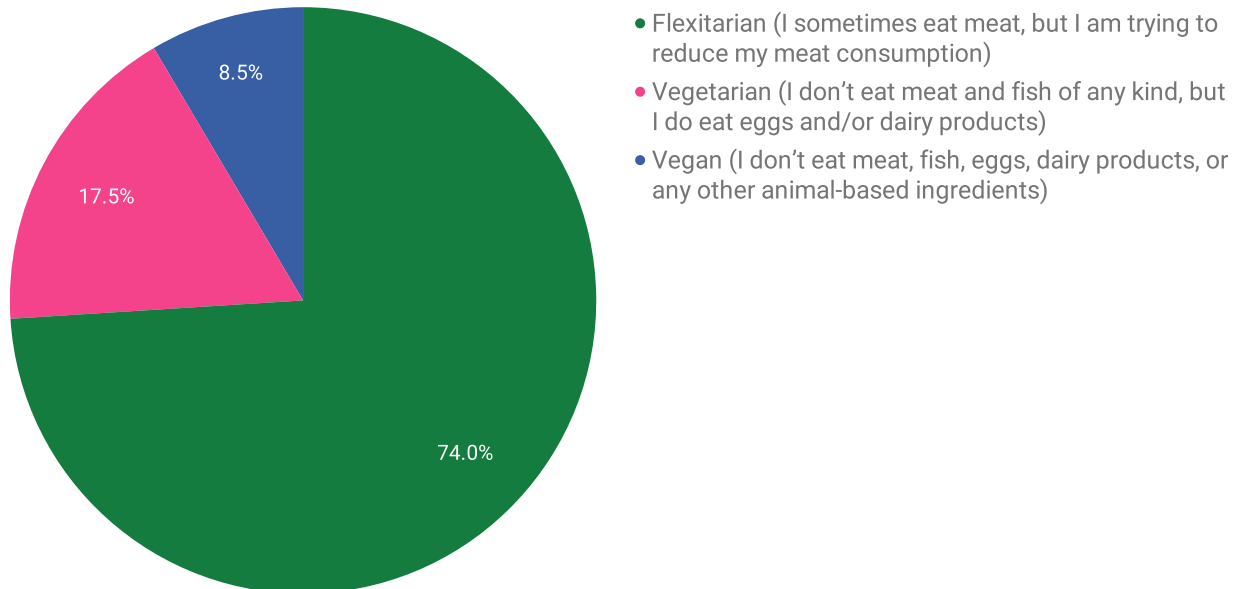
Use 'meaty' and 'cheesy' with caution

The results of this survey show that the terms 'meaty' and 'cheesy' are not fully understood, as it is hard to come up with clear definitions of these words. Most respondents understood that a 'meaty' food product contains meat and that a 'cheesy' food product contains cheese but were left with many questions regarding the ingredients and whether the product is plant-based or of animal origin. Therefore, food producers should use these terms with caution, only adding them to more established and well-known terms like 'vegan.'

4. RESULTS

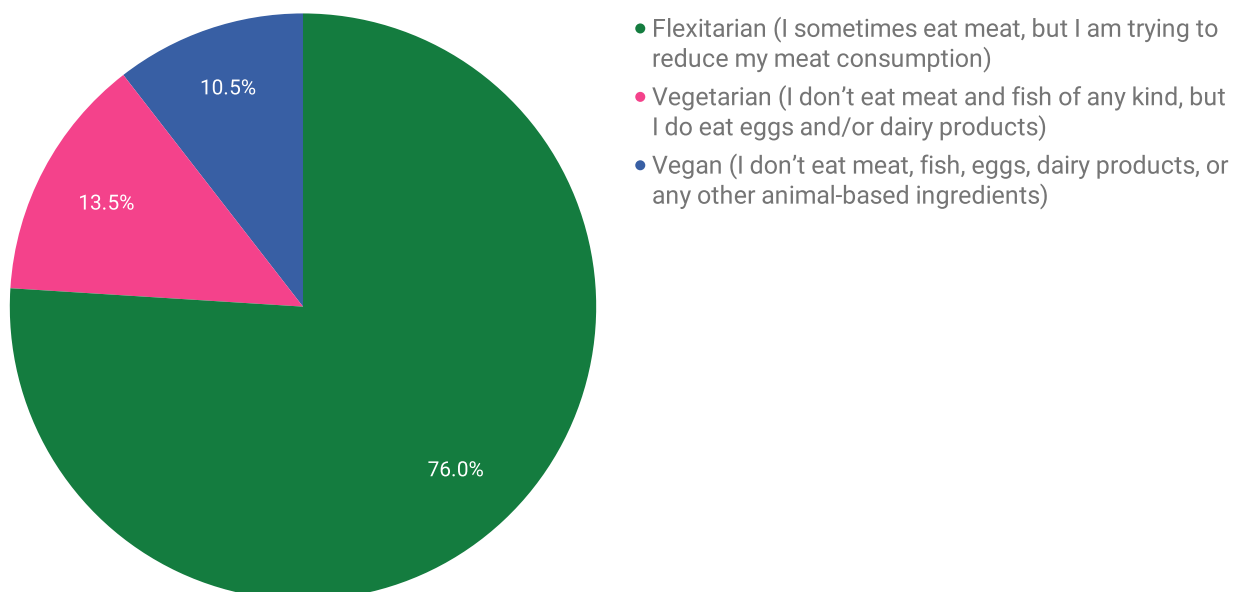
Eating Habits

Chart 1: Dietary lifestyle in the UK



74% of UK consumers described themselves as 'flexitarian', meaning they are reducing their meat consumption, while 17.5% follow a vegetarian diet, and 8.5% stated that they follow a vegan diet.

Chart 2: Dietary lifestyle in the US



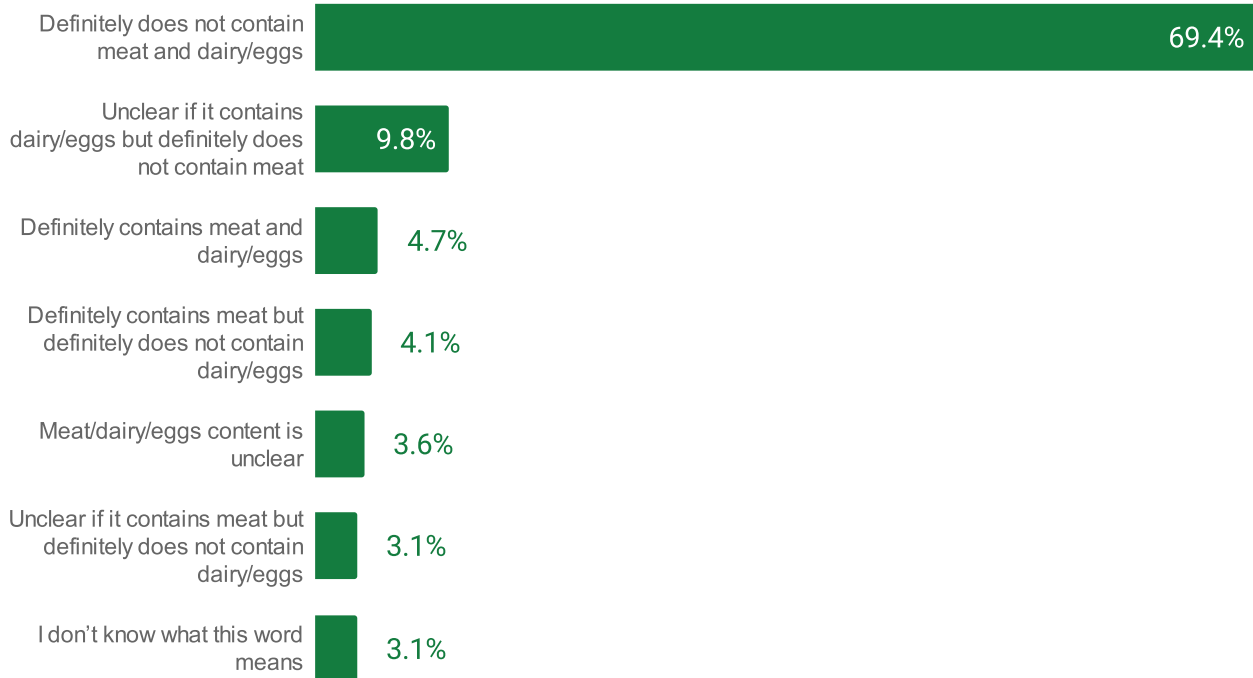
76% of US consumers described themselves as 'flexitarian', meaning that they are reducing their meat consumption. 13.5% stated that they were vegetarian, while 10.5% said that they followed a vegan diet.

2. UNDERSTANDING OF TERMINOLOGY



Well established understanding of 'vegan'

Chart 3: Understanding of the term 'vegan' in the UK (flexitarians, vegetarians, vegans)



Question: How would you describe your eating habits?

Vegan is the most understood term in the UK. 69.4% of all consumers surveyed thought that a vegan food product definitely does not contain meat and dairy/eggs. Still, 9.8% of consumers thought it might contain dairy/egg and 8.8% thought that it definitely contains meat. 3.6% of consumers were not sure about the meat, dairy, or egg content, while only 3.1% of UK consumers did not know what the term 'vegan' means.

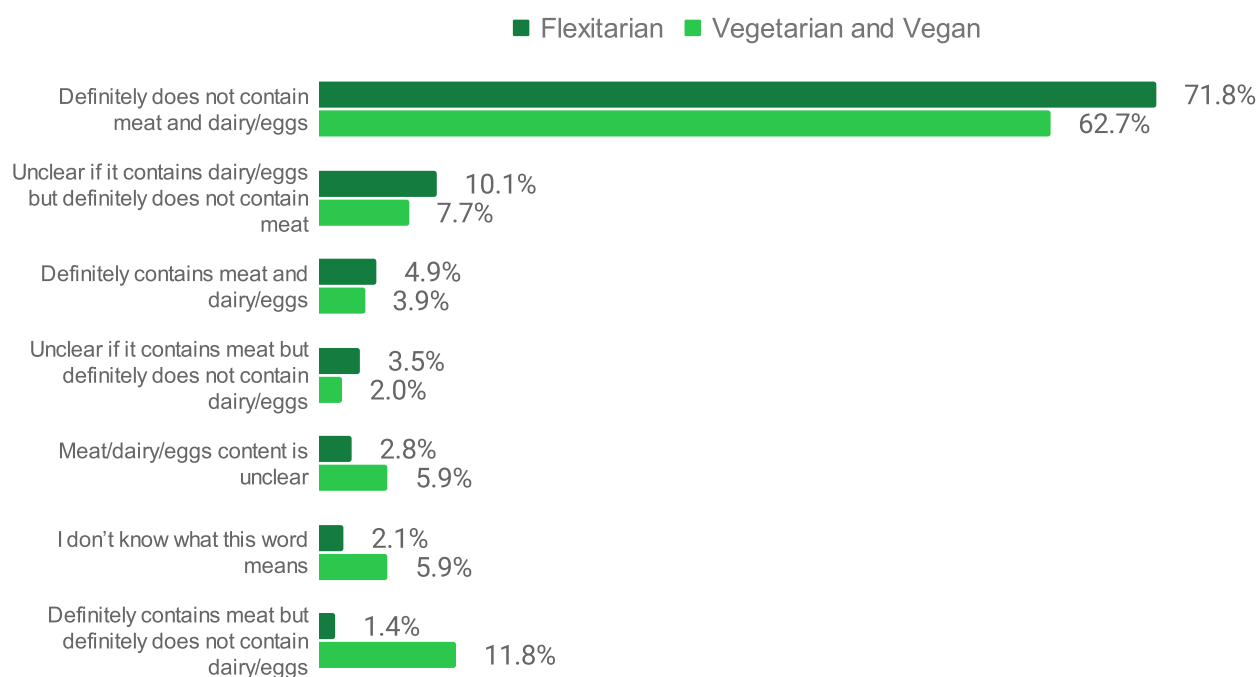


Well established understanding of 'vegan'



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Chart 4: Understanding of the term 'vegan' in the UK (flexitarians vs. vegetarians and vegans)

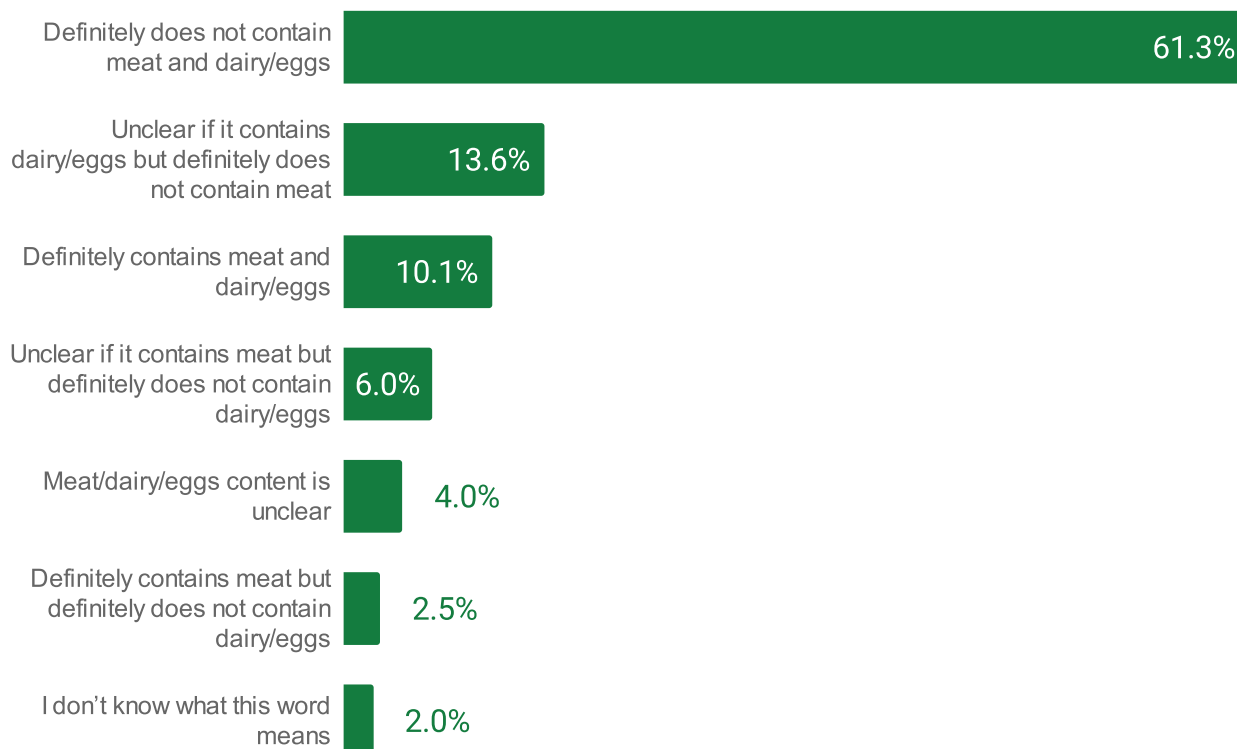


71.8% of flexitarians in the UK understood the term 'vegan' correctly, whereas 10.1% of flexitarians were not sure if 'vegan' excludes dairy/eggs. 4.9% of this diet group thought that a vegan food product contains meat and dairy/eggs, and 3.5% of them said they thought that it does contain meat but no dairy/eggs. Vegetarian and vegan consumers had a slightly lower understanding of the term 'vegan'. 62.7% of vegetarians and vegans understood the term 'vegan' correctly, which is a smaller share compared to flexitarians. 11.8% of these consumer groups thought that vegan food products definitely contain meat but do not contain dairy/eggs.

Well established understanding of 'vegan'



Chart 5: Understanding of the term 'vegan' in the US (flexitarians, vegetarians, vegans)



In the US, the majority of consumers understood the term 'vegan'. 61.3% of people chose the right definition, while 13.6% of participants said that vegan food products might still contain dairy/eggs, but no meat. A moderate share of 10.1% of consumers said that the term 'vegan' describes a food product which definitely contains meat and dairy/eggs, which is the wrong definition. 4% said they had no idea about the content regarding meat/dairy/eggs and only 2% of participants said they did not know what this term means.

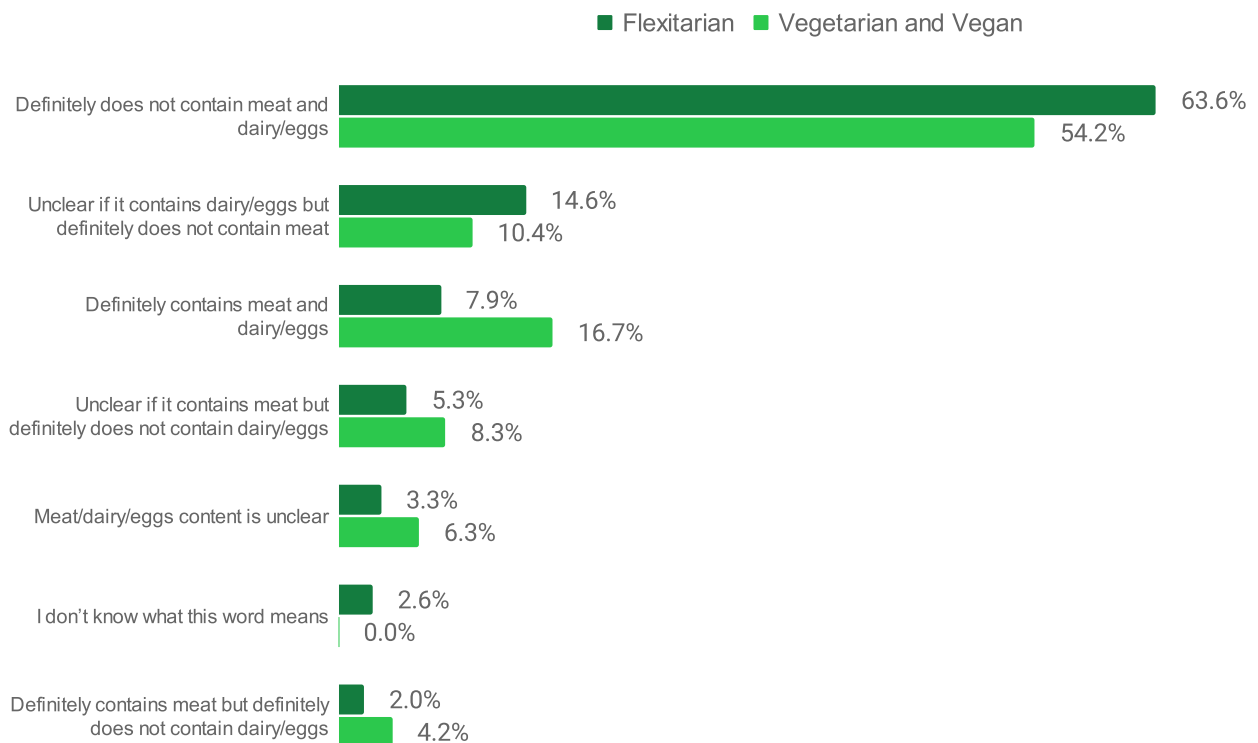


Well established understanding of 'vegan'



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Chart 6: Understanding of the term 'vegan' in the UK (flexitarians vs. vegetarians and vegans)



When distinguishing between dietary groups, flexitarians seemed to have a higher understanding of the term 'vegan.' 63.6% of them chose the right definition, while only 54.2% of vegetarians and vegans did so. Furthermore, 16.7% of US consumers who follow a vegetarian and vegan diet said that they understood that this term describes food which definitely contains meat and dairy. At the same time, only 7.9% of flexitarians agreed with this statement. While 14.6% of flexitarians said that a vegan food product definitely excludes meat but might include some dairy/eggs, only 10.4% of vegetarians and vegans thought so.



Summary of understanding of the term 'vegan'

1. Vegan is the most understood term, when it comes to plant-based food products. 69.4% of UK consumers and 61.3% of US consumers understood the term correctly. Food producers should mainly consider this term as a label for food products that do not contain any meat, dairy, and eggs.
2. There is no need to explain the word 'vegan', but if the food type is generally known to contain dairy/eggs, it should be mentioned that this version does not contain these ingredients.
3. Flexitarians have a very good understanding of the term 'vegan' and do not need any further explanation of it. Vegetarians and vegans have a lower understanding and are in need of more information and education around the term.

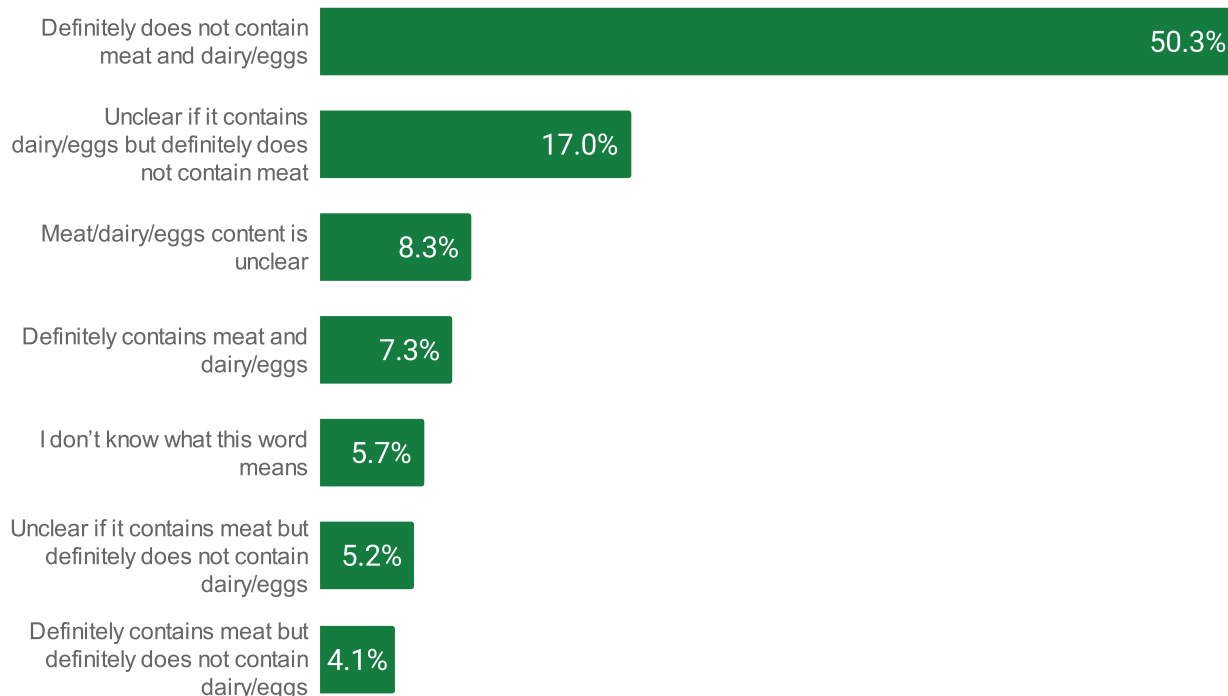


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More education needed to understand 'plant-based'



Chart 7: Understanding of the term 'plant-based' in the UK (flexitarians, vegetarians, vegans)



50.3% of consumers in the UK understood the term 'plant-based' correctly. They understood that these food products do not contain any meat and dairy/eggs. For 17% of the participants, it was clear that plant-based food products do not contain meat but unclear if they contain dairy/eggs. 7.3% of UK consumers thought that these products contain meat and dairy/eggs. In comparison to all the other terms to describe plant-based food, this term was the least understood. 8.3% were not sure about the meat, dairy, or egg content of the product and 5.7% of consumers said they did not know what 'plant-based' means.

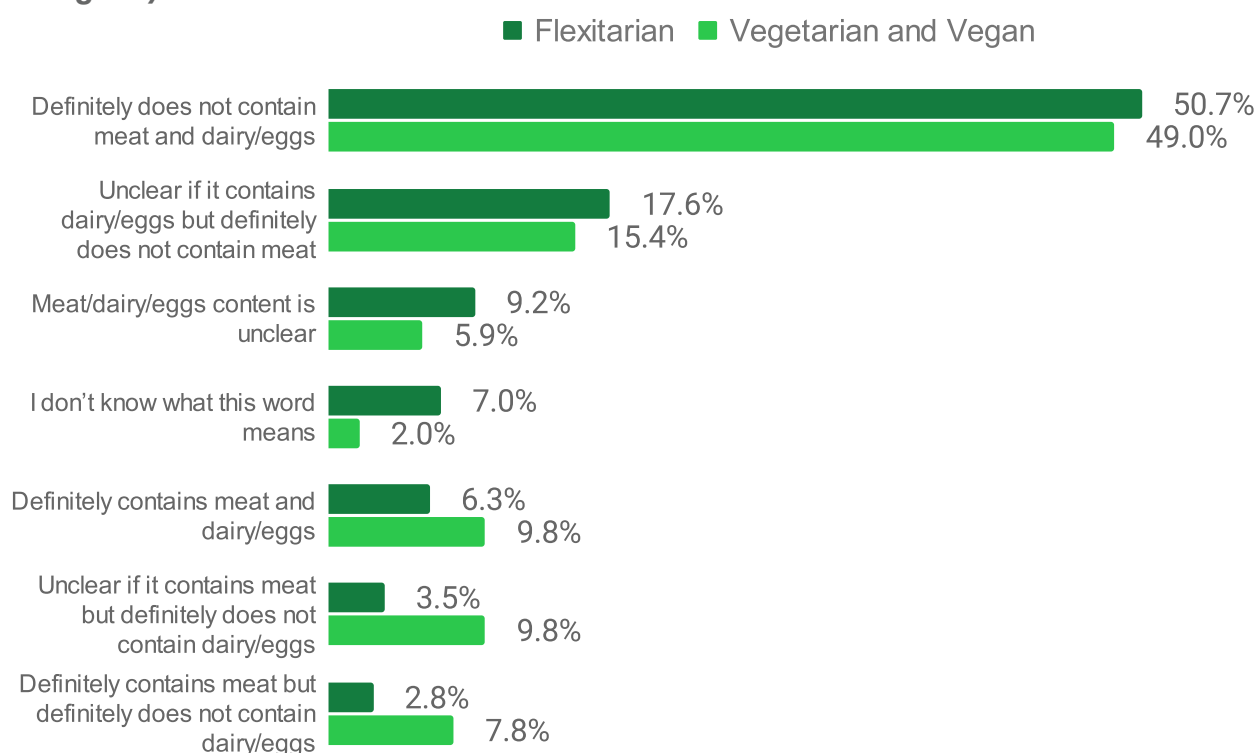


More education needed to understand 'plant-based'



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Chart 8: Understanding of the term 'plant-based' in the UK (flexitarians vs. vegetarians and vegans)

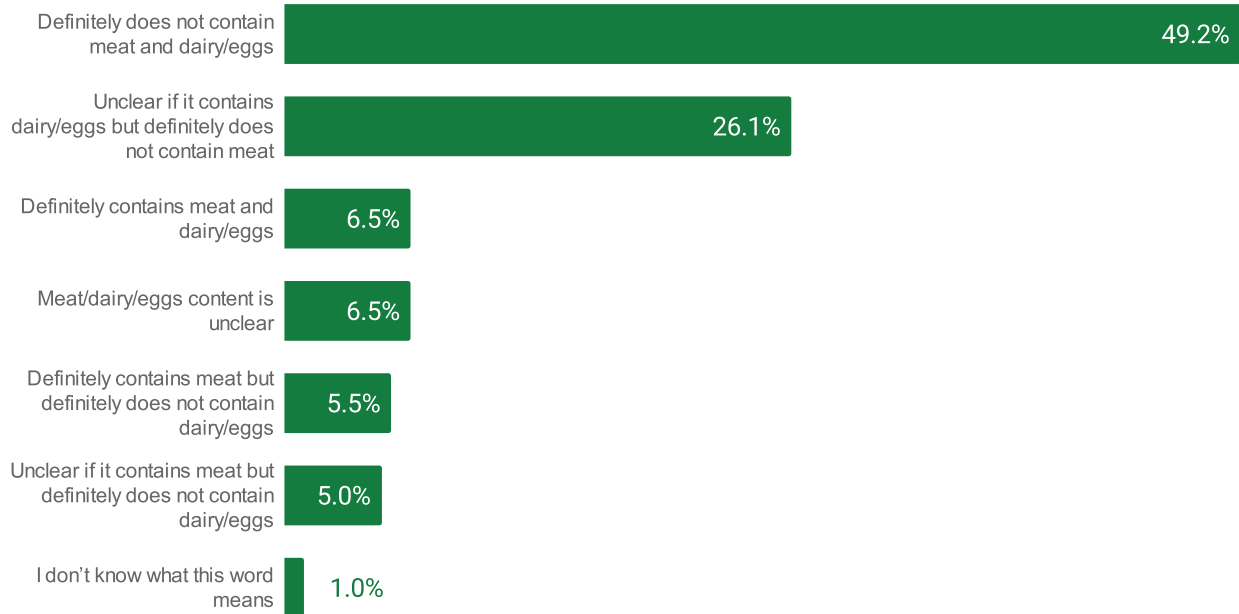


When comparing the dietary groups of flexitarians and vegetarians/vegans in the UK, the understanding of 'plant-based' was almost the same. Nearly half of both dietary groups understood that plant-based products do not contain any meat and dairy/eggs. For 17.6% of flexitarians and 15.4% of vegetarians and vegans it was not clear if these food products contain dairy/eggs. 9.2% of flexitarians said they were unsure about the ingredients of plant-based foods in general while 9.8% of vegans and vegetarians stated that they thought that these products definitely contain meat and dairy/eggs.

More education needed to understand 'plant-based'



Chart 9: Understanding of the term 'plant-based' in the US (flexitarians, vegetarians, vegans)



US consumers, in comparison, had a slightly worse understanding of the term 'plant-based'. 49.2% of them got the right definition, while 26.1% were confused about whether plant-based food contains any dairy/eggs. 6.5% of the surveyed participants even said that a plant-based product definitely contains meat and dairy/eggs, while 6.5% of consumers said that the ingredients of this kind of product are unclear.

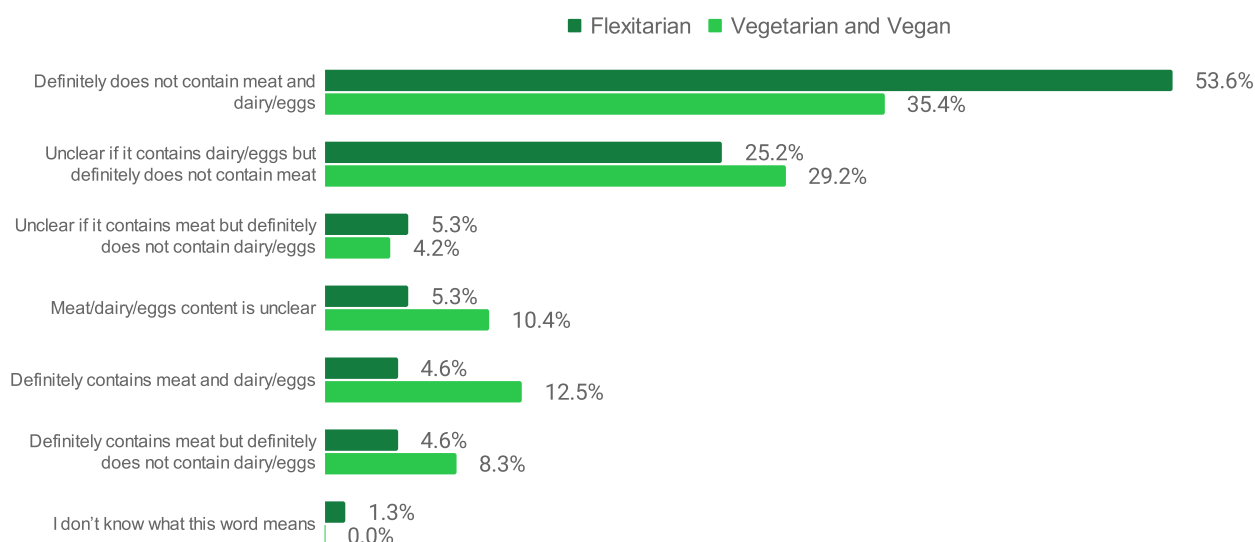


Marcin Jucha

More education needed to understand 'plant-based'



Chart 10: Understanding of the term 'plant-based' in the US (flexitarians vs. vegetarians and vegans)



Flexitarians in the US have a well-established understanding of the term 'plant-based', compared to vegetarians and vegans. While 53.6% of flexitarians described the term correctly, only 35.4% of vegetarians and vegans were able to do so. Both dietary groups (25.2% of flexitarians and 29.2% of vegetarians and vegans) stated that there is still some misunderstanding regarding dairy/eggs when thinking of a 'plant-based' food product. 12.5% of vegetarians and vegans connected this term with meat and dairy/eggs and said they would think that these are definitely included. Only 4.6% of people who follow a flexitarian diet said the same.



Summary of understanding of the term 'plant-based'

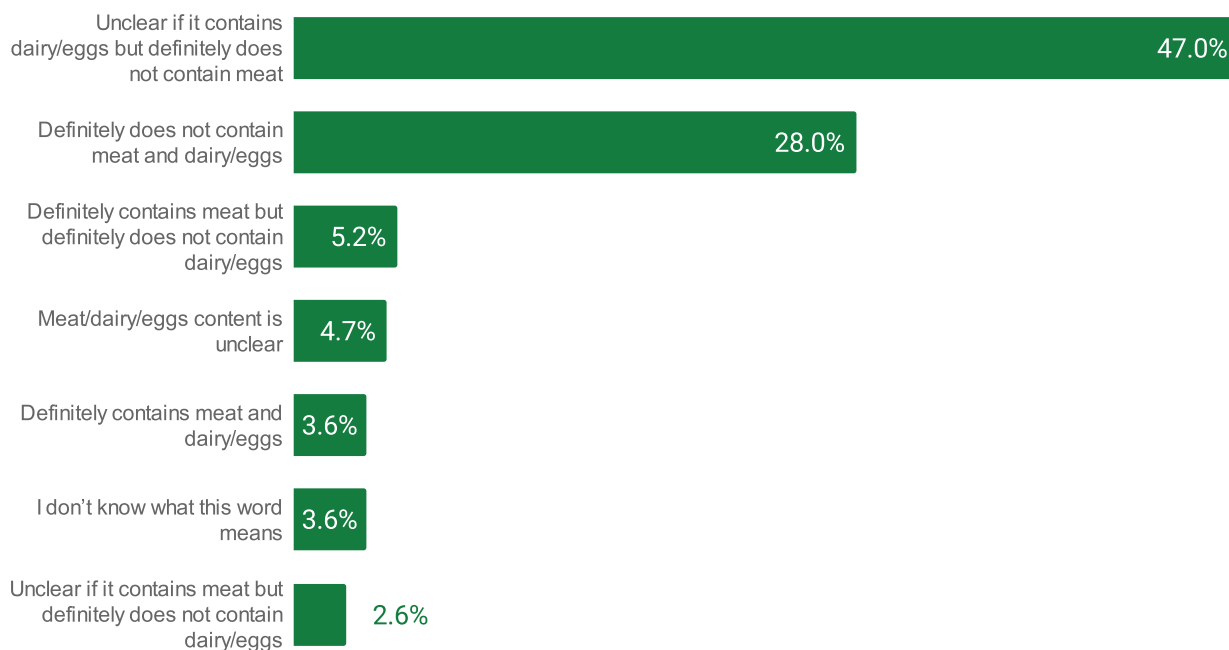
1. About half of the consumers (50.3% in the UK and 49.2% in the US) understood the term 'plant-based' correctly. Still, many consumers (17% in the UK and 26.1% in the US) were confused about the content of dairy/eggs in 'plant-based' food products. Food producers should offer more education about the term 'plant-based', explain which ingredients are included and which are not included.
2. Use the V-Label or an extra label with 'vegan' for clarity, since this term is more widely understood than 'plant-based'.
3. All dietary groups in the UK – flexitarians, vegetarians, and vegans – have the same level of understanding of the term 'plant-based' and need further explanation of what this term means. Vegetarians and vegans, especially, still have some misconceptions when it comes to this term, which is why these products should feature some additional explanation. In the US, flexitarians have a higher understanding of this term, compared with vegetarians and vegans.



Confusion around the term 'vegetarian'



Chart 11: Understanding of the term 'vegetarian' in the UK (flexitarians, vegetarians, vegans)



If a food product is labelled with the term vegetarian, 47% of consumers in the UK have the right definition in mind (unclear if it contains dairy/eggs but clear that it does not contain meat). 28% of consumers thought that a vegetarian food product definitely does not contain meat and dairy/eggs. Overall, 8.3% of UK consumers did not know what the term 'vegetarian' means or were not sure about the ingredients

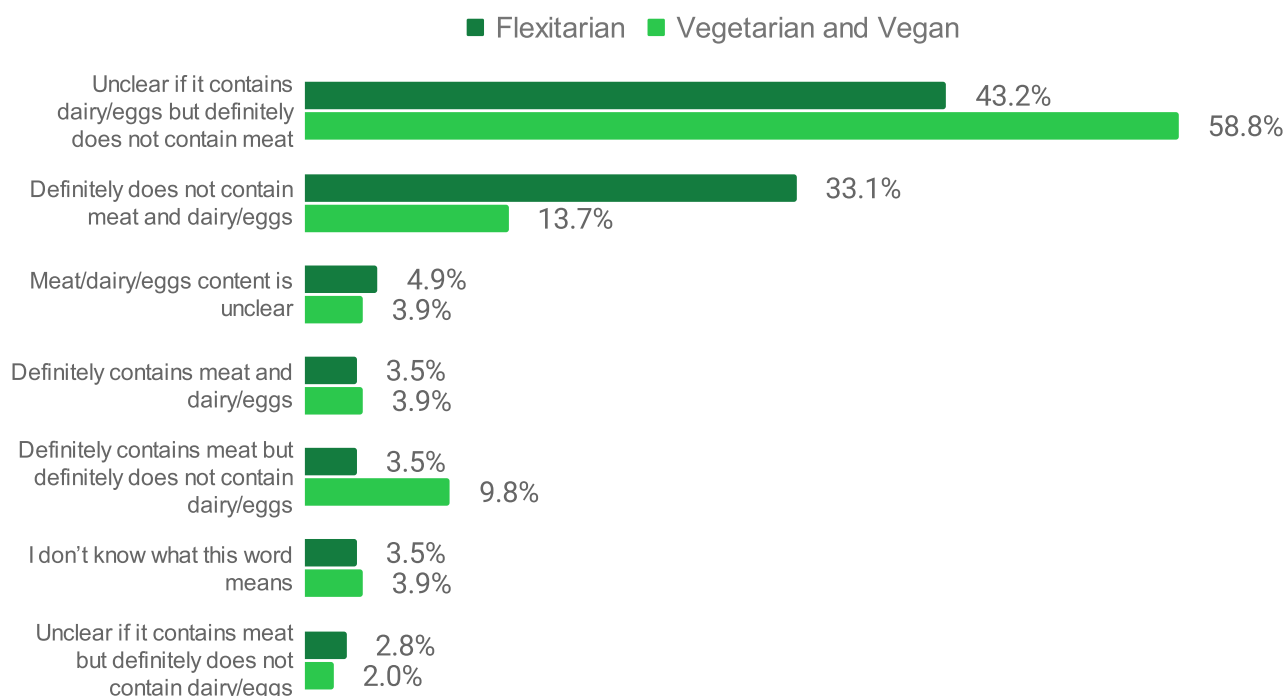


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Confusion around the term 'vegetarian'



Chart 12: Understanding of the term 'vegetarian' in the UK (flexitarians vs. vegetarians and vegans)

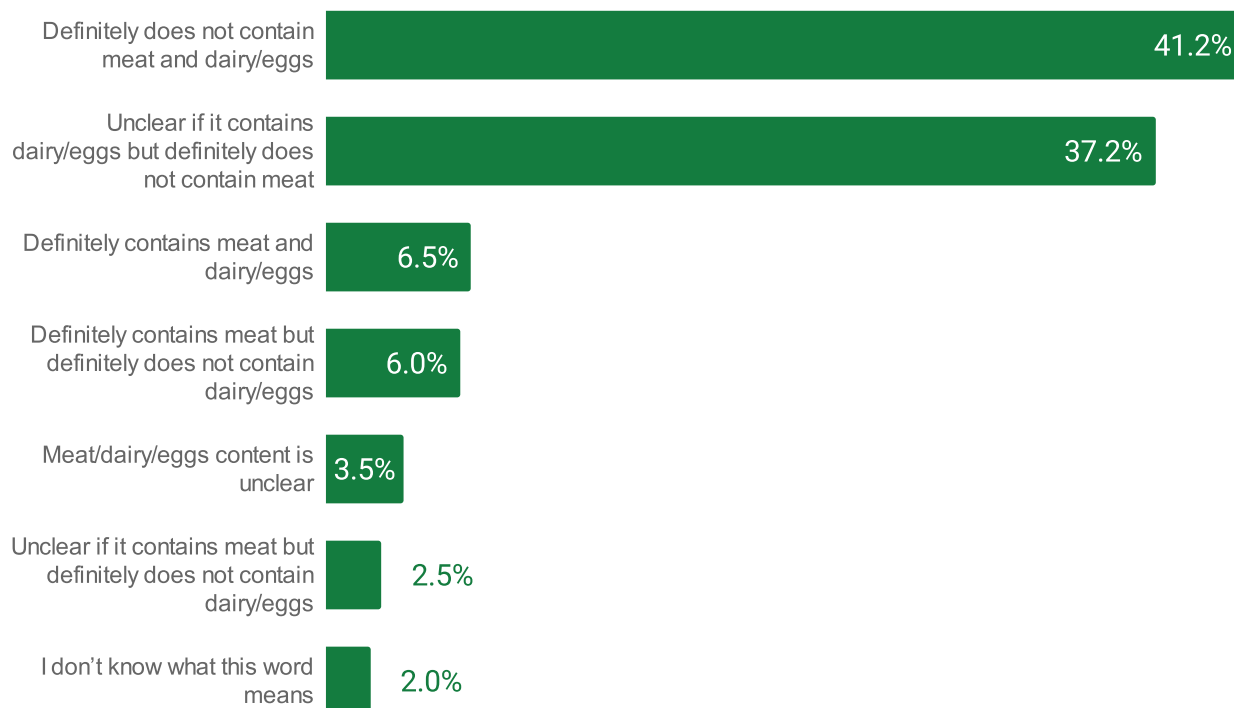


43.2% of flexitarians thought that a vegetarian food product might include dairy/eggs but definitely excludes meat. 33.1% of them said a vegetarian food product does not contain any meat and dairy/eggs. The majority of vegetarians and vegans (57.7%), on the other hand, understood that a vegetarian food product does not contain any meat but might contain dairy/eggs, while only 13.7% thought that this term describes the exclusion of both meat and dairy.

Confusion around the term 'vegetarian'



Chart 13: Understanding of the term 'vegetarian' in the US (flexitarians, vegetarians, vegans)



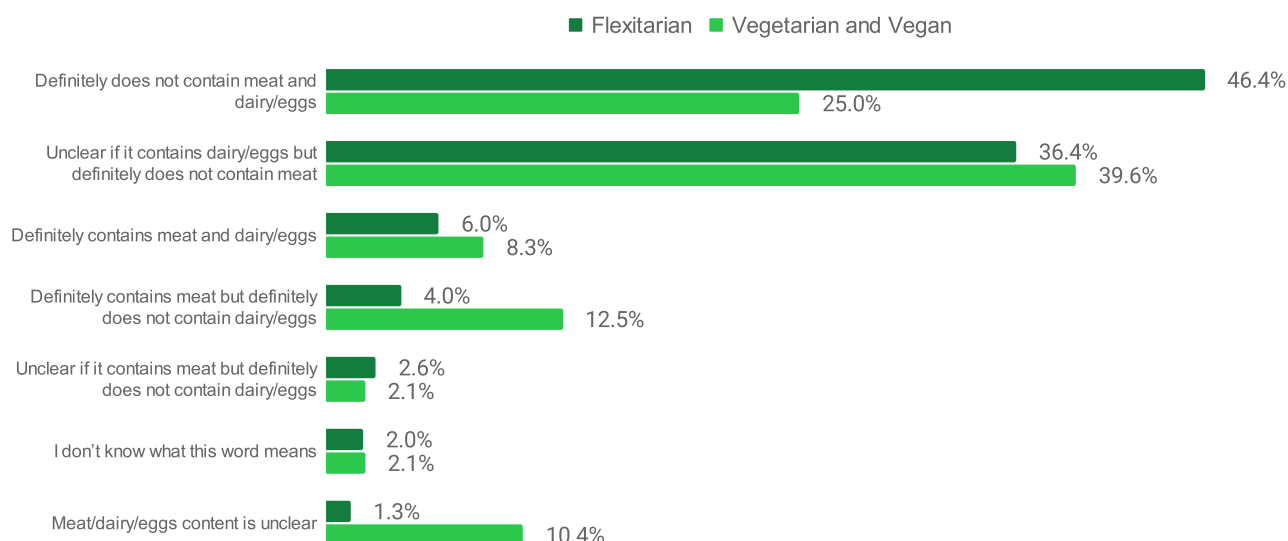
In the US, consumers had a lower understanding of the term 'vegetarian' than in the UK. Here, not even half of the participants (41.2%) were able to choose the correct definition of the term 'vegetarian'. 37.2% of consumers thought that this term means that a food product definitely excludes meat and dairy/eggs, which is the wrong definition for this term and better fits the term 'vegan' or 'plant-based'. 6.5% of people said that a vegetarian food product definitely contains meat and dairy/eggs.



Confusion around the term 'vegetarian'



Chart 14: Understanding of the term 'vegetarian' in the US (flexitarians vs. vegetarians and vegans)



Comparing the dietary groups, US flexitarians had a lower understanding of this term. The highest share of flexitarians (46.6%) said 'vegetarian' means that a food product excludes meat, as well as dairy/eggs. Only a low share of vegetarians and vegans (25%) agreed on this understanding. The majority of vegetarians and vegans (39.6%) had the right definition of this term and so did 36.4% of flexitarians. People who follow a vegetarian and vegan diet stated that seeing a food product with the label 'vegetarian' brought up questions and that the meat/dairy/egg content was unclear to them (10.4%).



Summary of understanding of the term 'vegetarian'

1. In the UK, 47% of consumers and in the US, only 37.2% of consumers understood the term 'vegetarian' correctly. In this regard, the vegetarian and vegan diet groups had a far better understanding than flexitarians.
2. In the UK, people who followed a vegetarian/vegan diet (58.8%), understood the term 'vegetarian' better than people who followed a flexitarian diet (42.2%). Since flexitarians are an interesting and important consumer group for vegetarian food products, they need further education about the term.
3. US consumers did not yet have an established understanding of the term 'vegetarian'. 41.2% confused it with the terms 'vegan' and 'plant-based'. If using this term, food producers should further educate consumers about its meaning, and distinguish it precisely from other terms.
4. 12.5% of people in the US believed that a vegetarian food product contains ingredients of animal origin (meat/dairy/eggs), which could stop them from purchasing the product. A vegetarian food product should have explicit information which mentions that there is no meat included but that dairy/eggs are included.

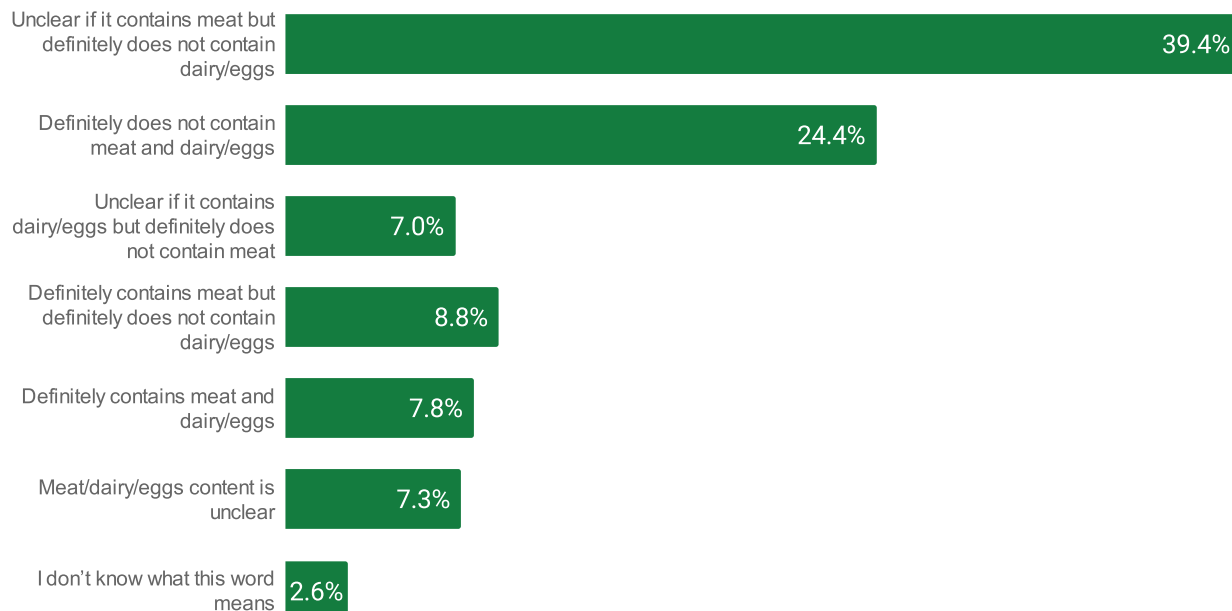


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Further explanation needed when using 'dairy-free'



Chart 15: Understanding of the term 'dairy-free' in the UK (flexitarians, vegetarians, vegans)



For 39.4% of UK consumers dairy-free meant that a food product does not contain dairy/eggs but it remained unclear to them if it contains meat. 24.4% of consumers thought that it does not include any dairy/eggs as well as meat. 7% of these consumers thought that a dairy-free product might contain dairy/eggs but definitely does not contain meat, which is the wrong definition of the term. 16.6% of consumers assumed that these products definitely contain meat, 8.8% of this group said it does not contain dairy/eggs, and 7.8% said it definitely includes dairy/eggs as well. 7.3% of consumers felt like the meat/dairy/egg content of 'dairy-free' food products remains unclear in general.

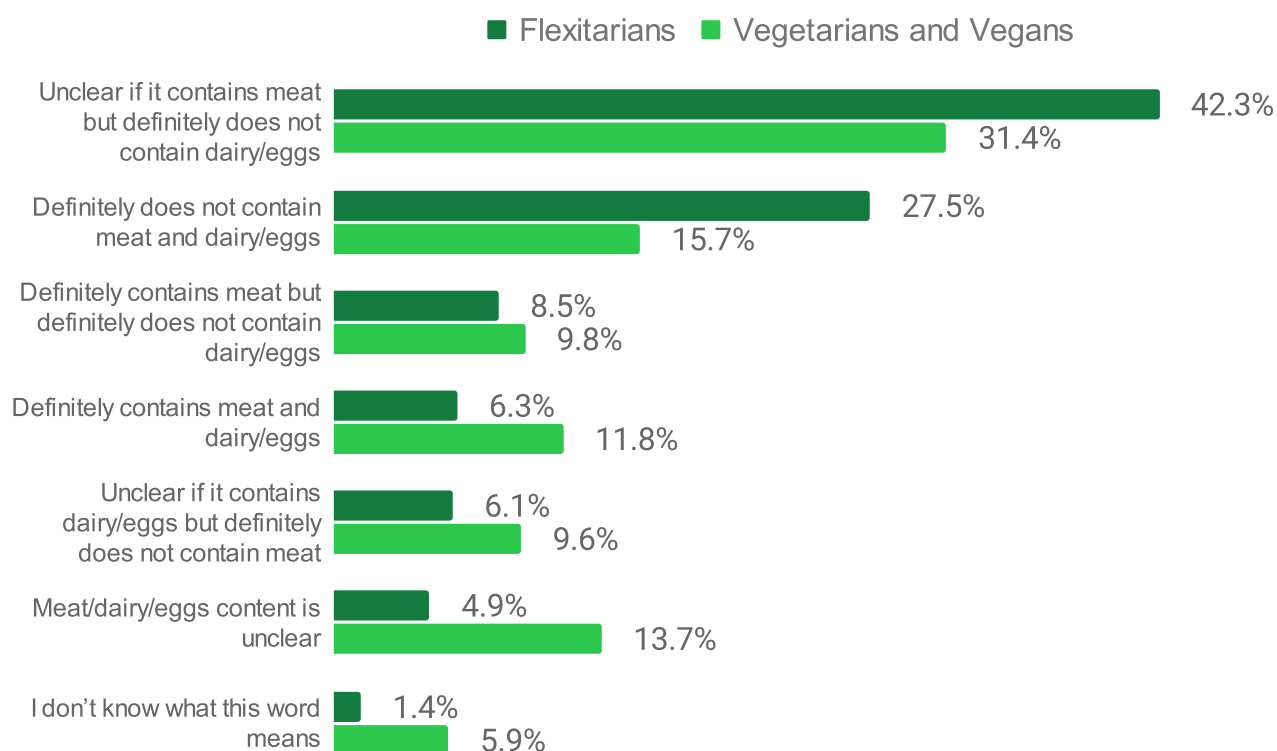


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Further explanation needed when using 'dairy-free'



Chart 16: Understanding of the term 'dairy-free' in the UK (flexitarians vs. vegetarians and vegans)



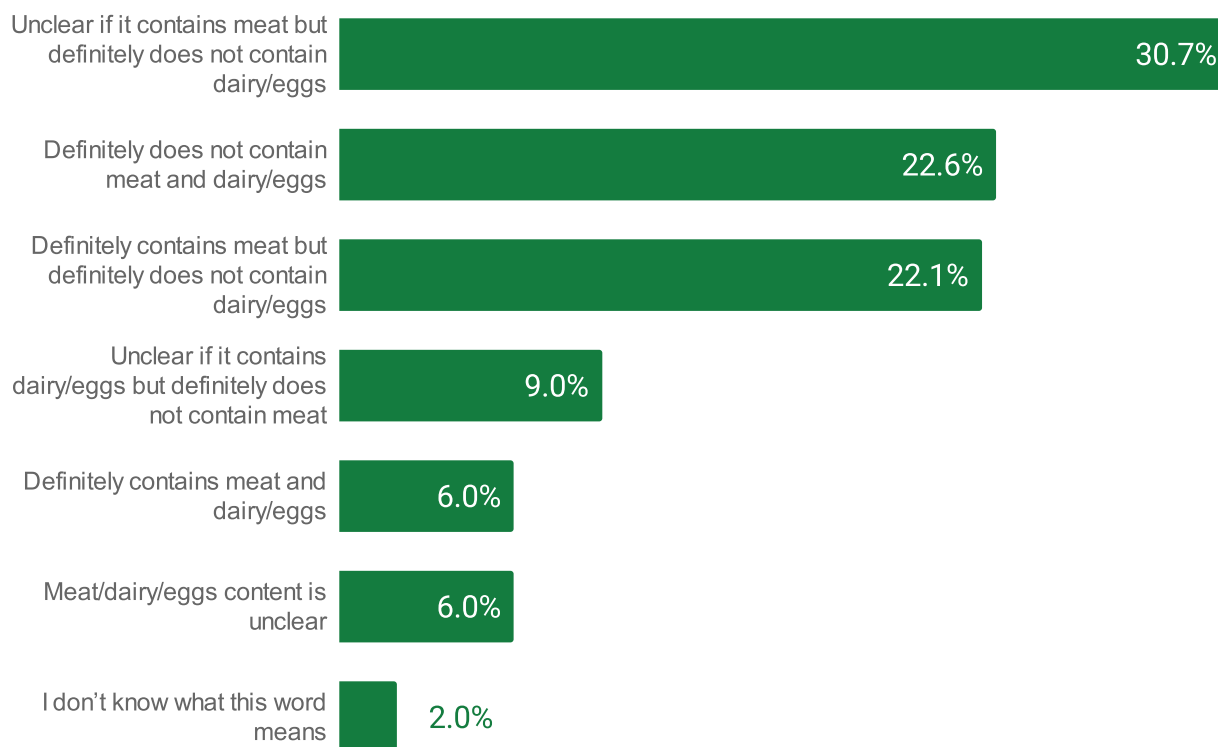
Flexitarians had a better understanding of this term, as 42.3% of this diet group understood the term correctly, saying it definitely does not contain any dairy/eggs. 27.5% of UK flexitarians said that in addition to not containing dairy/eggs, these food products also exclude meat. Only 4.9% of consumers said that the ingredients of a 'dairy-free' product are unclear.

Vegetarians and vegans, on the contrary, seemed to have a lower understanding than the average UK consumer. Only 3.4% of consumers understood that these products do not contain dairy/eggs but might still include meat, while 15.7% of consumers said it excludes dairy/eggs as well as meat. For 13.7% of vegetarians and vegans the meat/dairy/egg content of these products remained unclear.

Further explanation needed when using 'dairy-free'



Chart 17: Understanding of the term 'dairy-free' in the US (flexitarians, vegetarians, vegans)



In the US, 30.7% of consumers understood the term 'dairy-free' correctly. Overall, 75.4% of consumers understood that this term describes a food product which does not contain any dairy/eggs. Still, there was much confusion over whether the product contained meat. 30.7% said they were not sure about the meat content, 22.6% thought that meat is definitely excluded, and 22.1% believed that 'dairy-free' food products definitely contain meat.

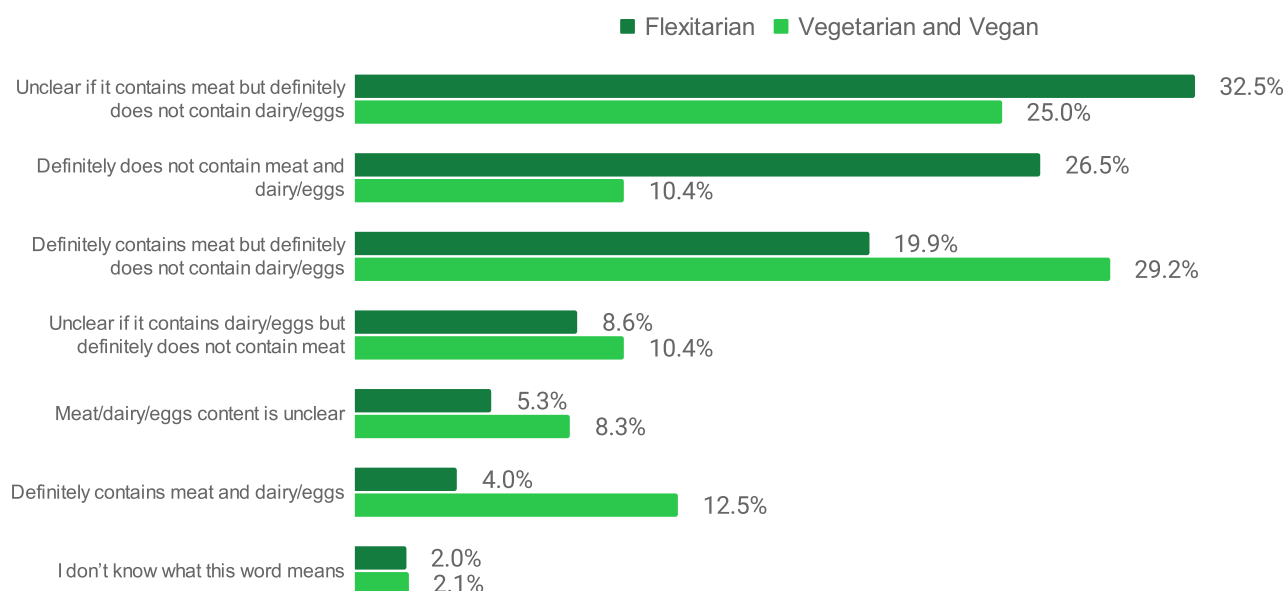


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Further explanation needed when using 'dairy-free'



Chart 18: Understanding of the term 'dairy-free' in the US (flexitarians vs. vegetarians and vegans)



Looking more closely at the dietary groups, there were different opinions about the term 'dairy-free.' Most flexitarians (32.5%) were not clear about whether the product contained meat, while 29.2% of vegetarians and vegans said that this term describes a product that definitely contains meat. Additionally, some vegetarians and vegans (12.5%) believed that a dairy-free food product definitely contains meat and dairy/eggs. Only 4% of flexitarians grasped this concept of 'dairy-free.'



Summary of understanding of the term 'dairy-free'

1. In the UK, 72.6% of consumers understood that a dairy-free food product does not contain dairy/eggs. 39.4% out of these consumers were unclear about the meat content, 24.4% thought that there is no meat included, and 8.8% believed that there is definitely meat included.
2. Even though the term 'dairy-free' is self-explanatory, only 39.4% of UK consumers and 30.7% of US consumers got the definition right or partly right. This leads to the conclusion that consumers are not used to the term 'dairy-free' and need further clarification from food producers.
3. Vegetarians and vegans (13.7% in the UK and 12.5% in the US) in particular were confused about the term, many of them saying that the meat, dairy/egg content is unclear.



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A horizontal bar chart with seven bars of varying lengths, all in a dark blue color. The bars represent percentages of responses to the question 'What do you think about the word "flexitarian"?'. The text for each response is on the left, and the percentage value is on the right, either inside or next to the bar.

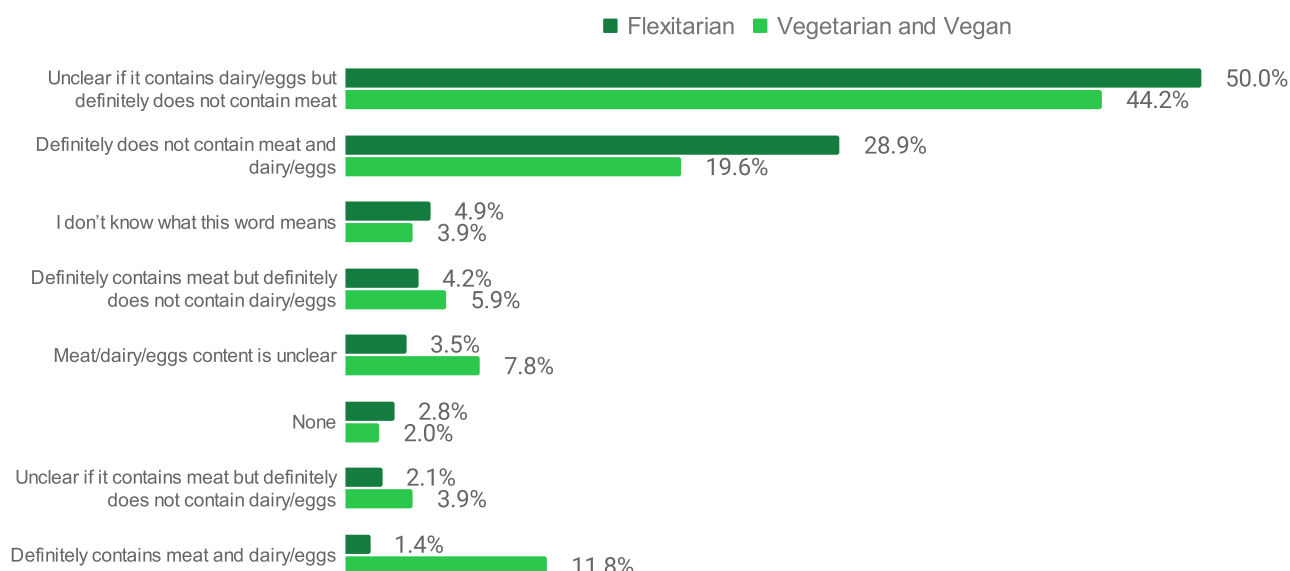
Response	Percentage
Unclear if it contains dairy/eggs but definitely does not contain meat	48.5%
Definitely does not contain meat and dairy/eggs	26.4%
Definitely contains meat but definitely does not contain dairy/eggs	4.7%
Meat/dairy/eggs content is unclear	4.7%
I don't know what this word means	4.7%
Definitely contains meat and dairy/eggs	4.1%
Unclear if it contains meat but definitely does not contain dairy/eggs	2.6%

[illegible]

Only use 'meat-free' in conjunction with other terms



Chart 20: Understanding of the term 'meat-free/meatless' in the US (flexitarians vs. vegetarians and vegans)

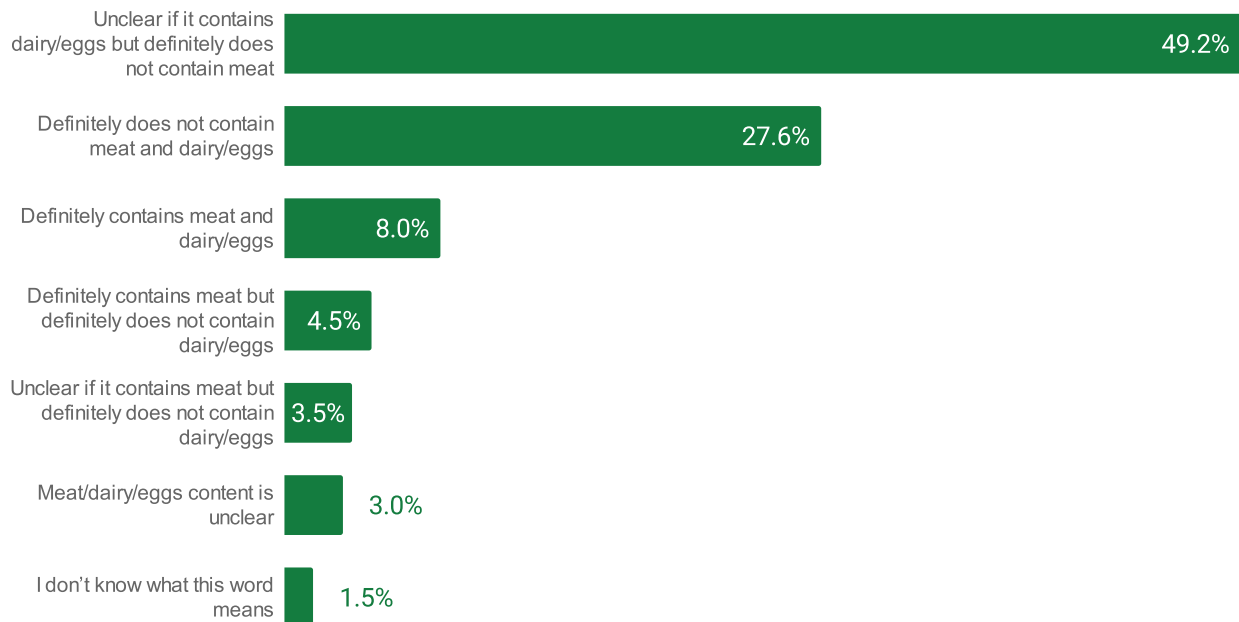


Half of flexitarians (50%) and 44.2% of vegetarians and vegans said that a meat-free/meatless food product excludes meat but still might contain dairy/eggs. 11.8% of vegetarians and vegans said that a meat-free/meatless food product definitely contains meat/dairy/eggs while only 1.4% of flexitarians agreed with this statement. 4.9% of flexitarians said they did not know what the term means and 7.8% of vegetarians and vegans said the meat/dairy/eggs content remains unclear.

Only use 'meat-free' in conjunction with other terms



Chart 21: Understanding of the term 'meat-free'/'meatless' in the US (flexitarians, vegetarians, vegans)



49.2% of US consumers thought that the term 'meat-free'/'meatless' means that the product definitely does not contain meat but said that it was unclear if it contains any dairy/eggs. The second highest share of 27.6% of consumers said that this label means that there is definitely no meat and dairy/eggs included, while 8% believed that meat and dairy/eggs are definitely included in the food product. 3% of US consumers said the meat/dairy/eggs content is unclear and only 1.5% of consumers had no understanding of the term at all.

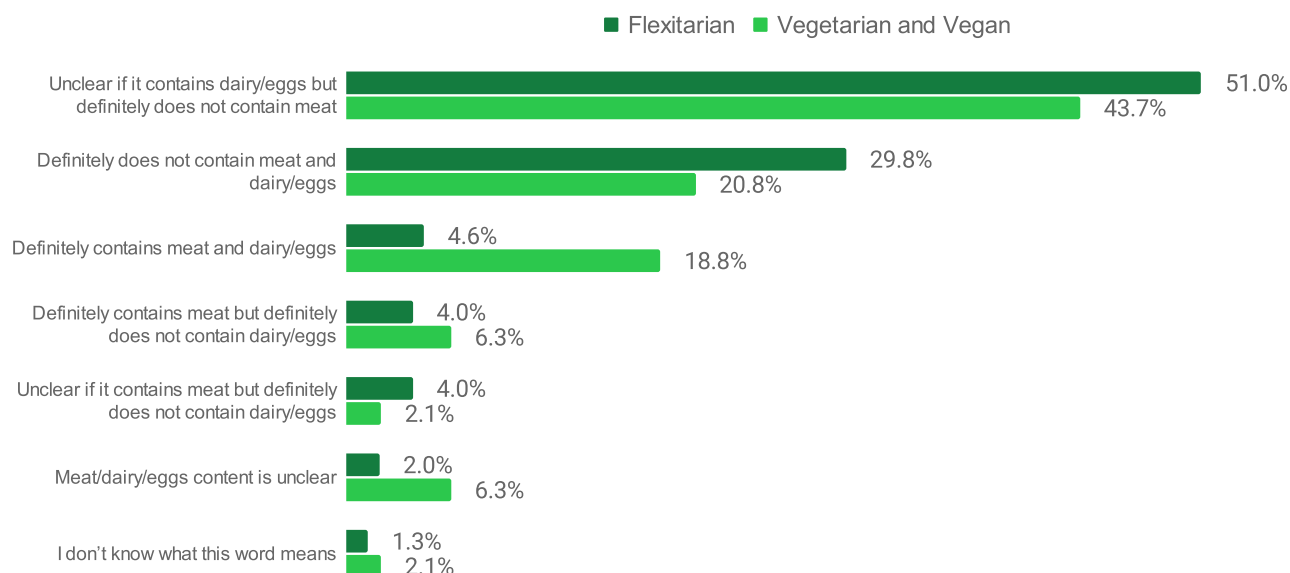


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Only use 'meat-free' in conjunction with other terms



Chart 22: Understanding of the term 'meat-free'/'meatless' in the US (flexitarians vs. vegetarians and vegans)

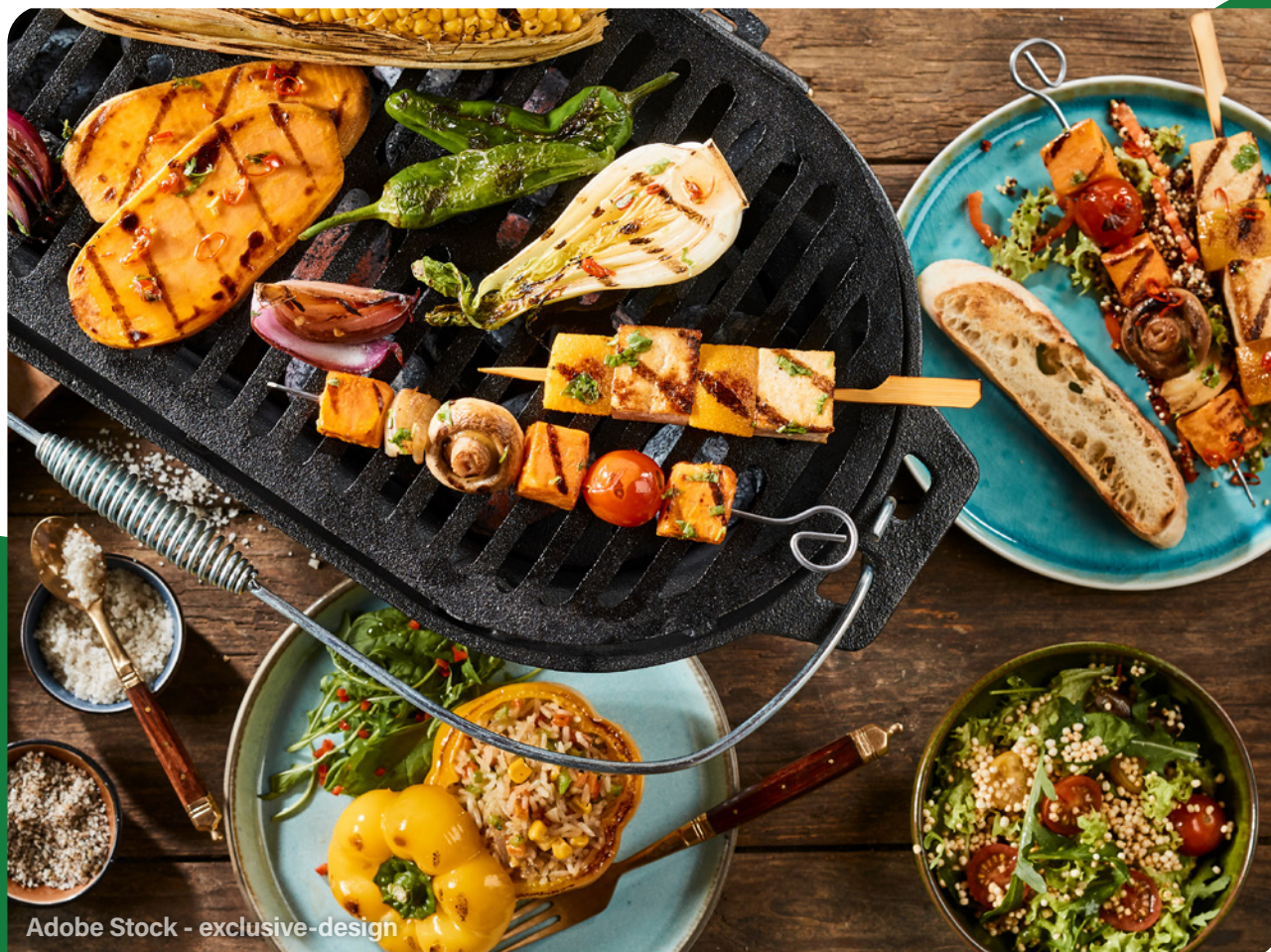


51% of flexitarians and 43.7% of vegetarians and vegans thought that a 'meat-free'/'meatless' food product must exclude meat but might contain dairy/eggs. While 29.8% of flexitarians stated that a food product with this label definitely contains neither meat nor dairy/eggs, 18.8% of vegetarians and vegans said that it contains both meat and dairy/eggs. Also, for 6.3% of people who followed a vegetarian or vegan diet, the meat/dairy/eggs content of the product remained unclear.



Summary of understanding of the term 'meat-free'

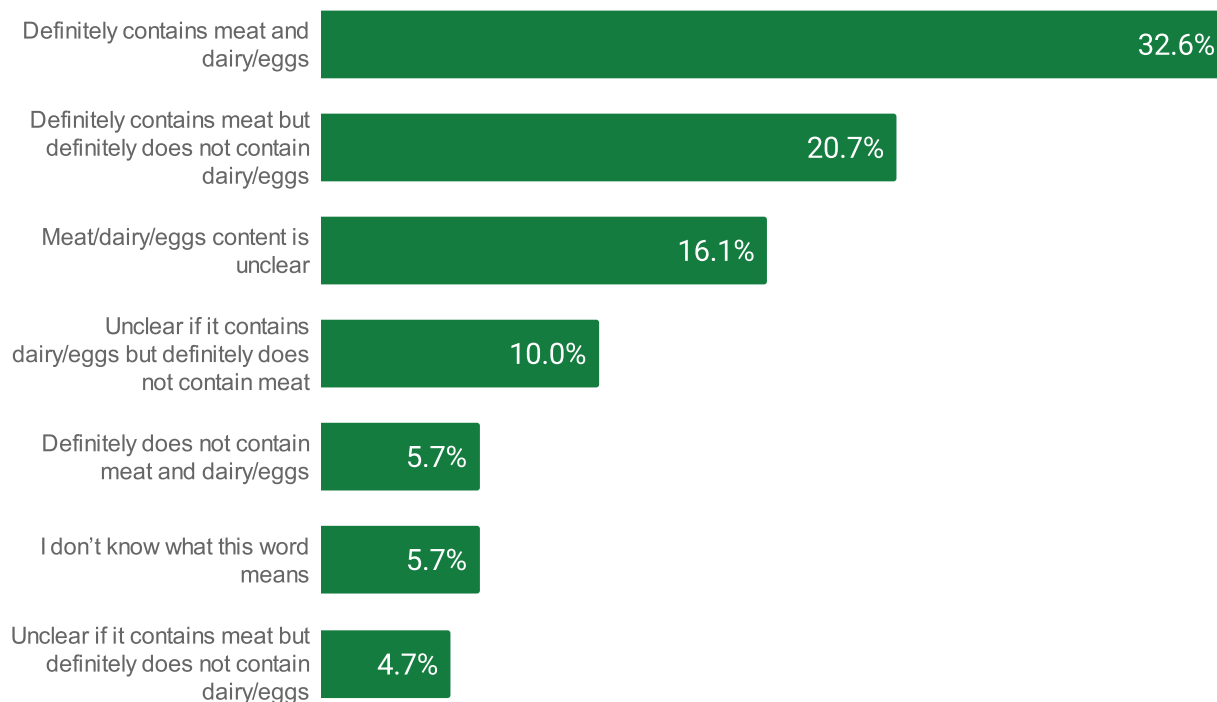
1. 74.9% of UK consumers and 76.8% of US consumers understood that a 'meat-free'/ 'meatless' food product does not contain any meat. Opinions about dairy/egg content varied greatly in the two countries and for the different diet groups. Most people (48.5% in the UK and 49.2% in the US) said that the dairy/egg content was unclear.
2. 18.8% of vegetarians and vegans in the US thought that these kinds of products definitely contain meat and dairy/eggs. This shows that this consumer group is in need of more education, since they form an important target group for food producers manufacturing these kinds of products.
3. The term 'meat-free'/'meatless' remained foreign to consumers, which is why this label should be used only in addition to other descriptors like 'vegan', 'plant-based', or 'vegetarian'. Alternatively, a product could be called 'meat-free'/'meatless' but should definitely feature the vegan or vegetarian label.



'Meaty' does not convey information on dairy/egg content



Chart 23: Understanding of the term 'meaty' in the UK (flexitarians, vegetarians, vegans)



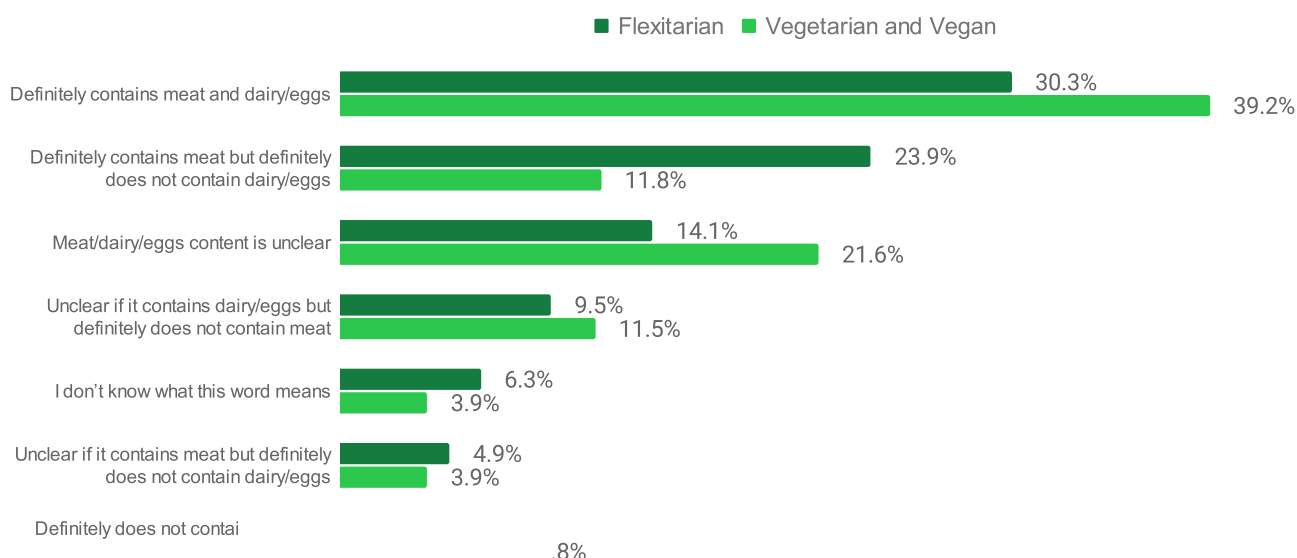
32.6% of UK consumers agreed that the term 'meaty' describes a food product that definitely contains meat as well as dairy/eggs. 20.7% of people agreed about the meat content but thought that the product does not contain any dairy or eggs as an ingredient. A share of 16.1% of consumers in the UK stated that they were still questioning the ingredients of a meaty food product. 10% of consumers agreed that meat had to be an ingredient, but were not sure about whether the product contained dairy/eggs.



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Chart 24: Understanding of the term 'meaty' in the UK (flexitarians vs. vegetarians and vegans)

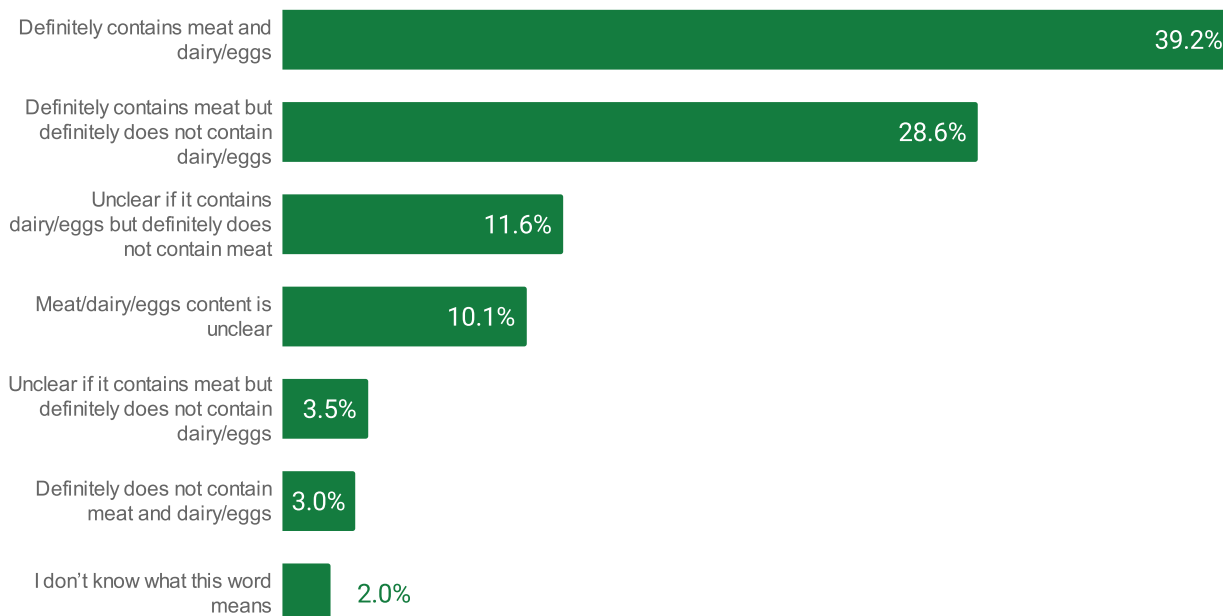


When comparing the dietary groups, flexitarians and vegetarians/vegans had a slightly different understanding of this term. 30.3% of flexitarians said that this food product must contain meat and dairy/eggs, while 23.9% said it does contain meat but no dairy/eggs. Vegetarians and vegans were more confident with the definition, saying that the product 'definitely contains meat and dairy/eggs' (39.2%), while 21.6% of them were unsure about the meat/dairy/egg content.

'Meaty' does not convey information on dairy/egg content



Chart 25: Understanding of the term 'meaty' in the US (flexitarians, vegetarians, vegans)



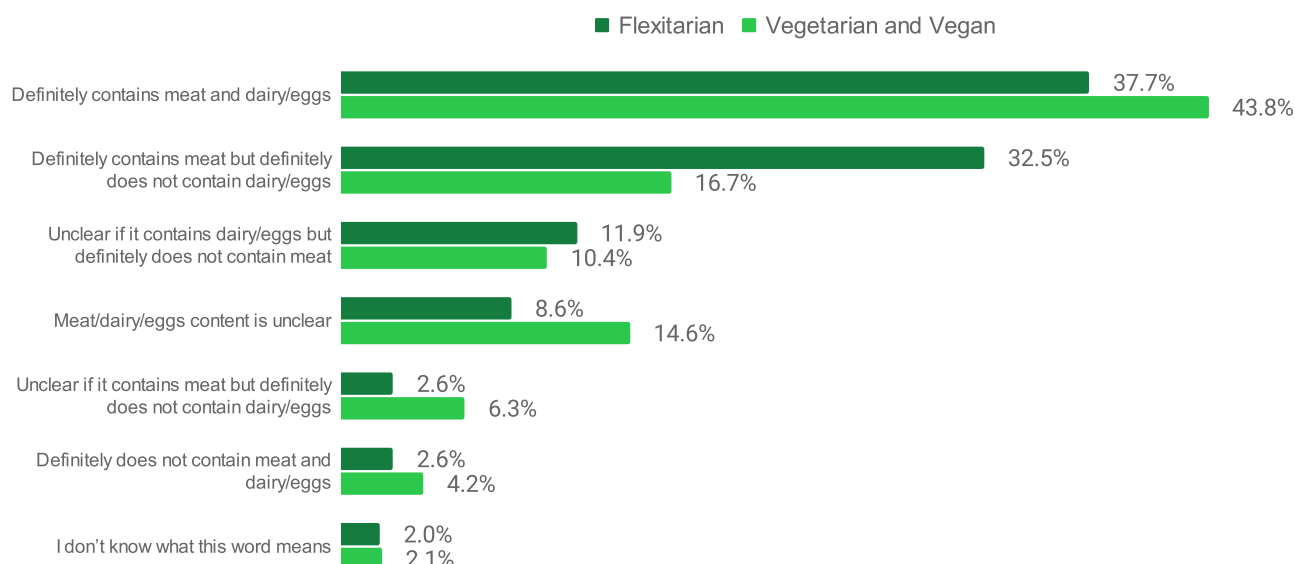
US consumers had similar perceptions of the term 'meaty'. 39.2% of them believed that a meaty food product definitely contains meat and dairy/eggs. 28.6% of people in the US slightly disagreed with this and said it does include meat but not definitely no dairy/eggs. 10.1% of people in the US were not clear about the meat/dairy/egg content in food products with the label 'meaty'.



'Meaty' does not convey information on dairy/egg content



Chart 26: Understanding of the term 'meaty' in the US (flexitarians vs. vegetarians and vegans)



In the US, 37.7% of flexitarians and 43.8% of vegetarians and vegans said they thought that this term describes a product that does contain meat and dairy/eggs. A big share of flexitarians (32.5%) thought differently about the definition of this term, saying that meat is definitely included but dairy/eggs are definitely excluded. Only 16.7% of vegetarians and vegans agreed to this definition, 14.6% of them said that they were unsure about the meat/dairy/egg content in 'meaty' food products.



Summary of understanding of the term 'meaty'

1. The majority of consumers (53.3% in the UK and 67.4% in the US) understood that a 'meaty' food product definitely contains meat, which is the correct definition. Still, the dairy/eggs content remained unclear.
2. The majority of consumers understood that this term describes a food product that most certainly contains meat. Food producers need to offer clarification, education, or an alternative label to help consumers understand the product better.
3. Flexitarians, in particular, were confused about the term 'meaty' and might get confused if this is a potential food product for them.
4. If you wish to call your food product 'meaty', you should give the consumer some additional explanation, since the descriptor only talks about the ingredient meat. By only using this term to label a food product, the consumer might be misled or left without important information about the product.

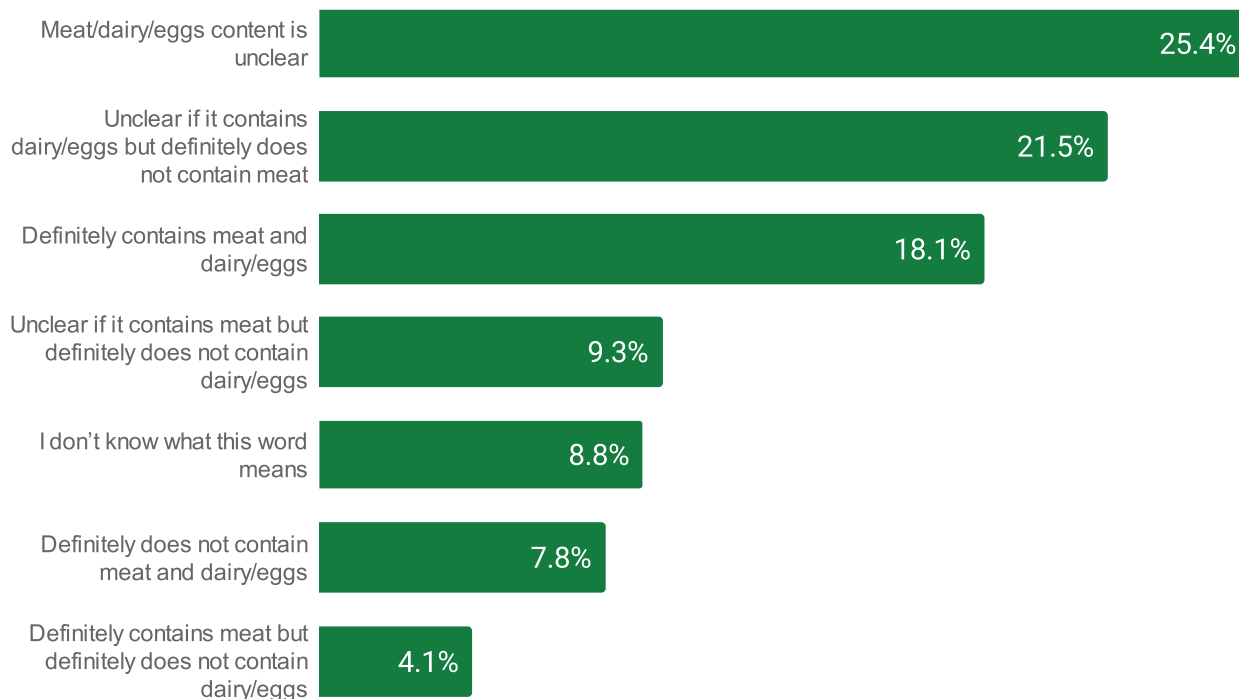


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Low understanding and misconception of 'cheesy'



Chart 27: Understanding of the term 'cheesy' in the UK (flexitarians, vegetarians, vegans)



Consumers in the UK had the lowest understanding of the term 'cheesy'. 25.4% said that a food product which is labelled with 'cheesy' brings up questions regarding the ingredients and that the meat/dairy/egg content is unclear. Another 21.5% of the overall sample said that a cheesy product definitely does not contain meat but might consist of some dairy/eggs. On the other hand, 18.1% believed this term describes a food product which contains both meat and dairy/eggs. 8.8% of people in the UK did not know what this word means at all.

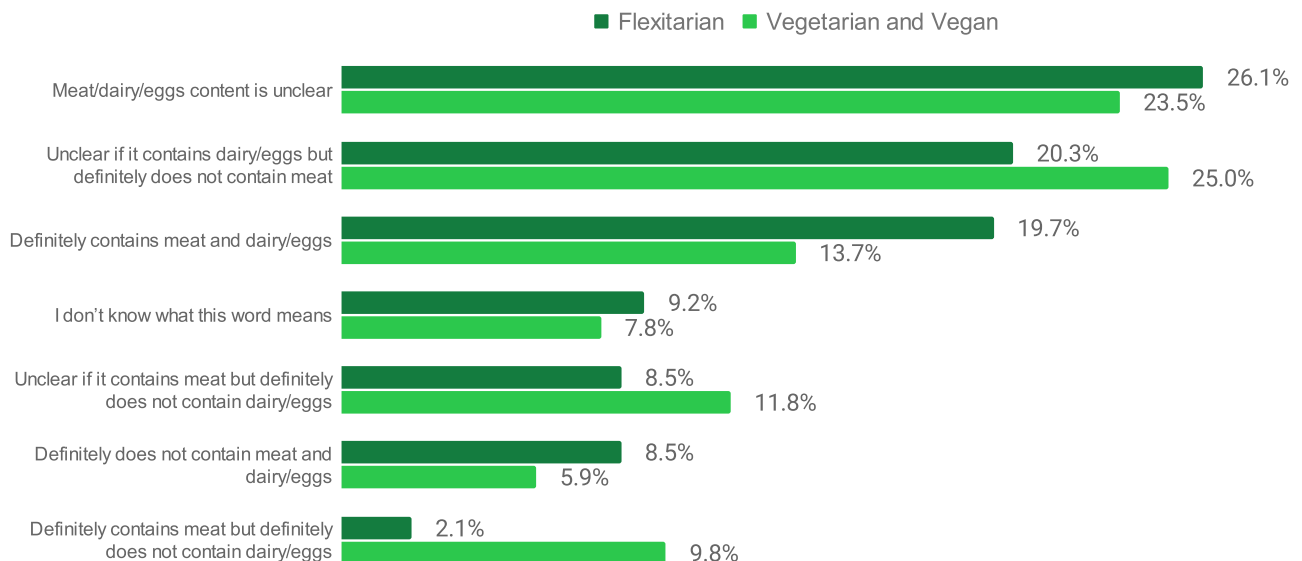


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Low understanding and misconception of 'cheesy'



Chart 28: Understanding of the term 'cheesy' in the UK (flexitarians vs. vegetarians and vegans)

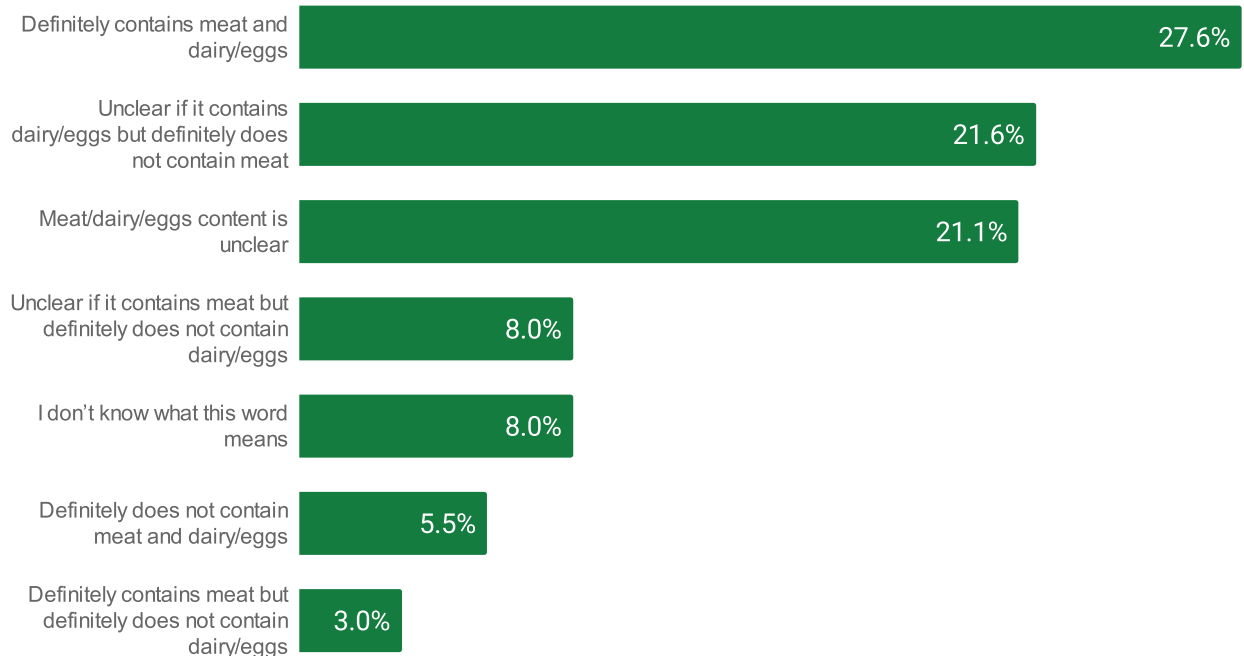


The different dietary groups have different conceptions of what is meant by the term 'cheesy'. Most of the flexitarians believed that the meat/dairy/egg content of the product is unclear (26.1%), followed by the belief that it must exclude meat but possibly include dairy/eggs (20.3%). Vegetarians and vegans, on the contrary, said that a cheesy food product definitely does not include meat but that they were not sure about the dairy/egg content (25%). A relatively high share of vegetarians and vegans (11.8%) stated that this term means that the food product definitely does not contain any dairy/eggs but might contain some meat. Only 8.5% of flexitarians agreed with this statement. 9.8% of UK consumers who followed a vegetarian and vegan diet had the impression that these food products definitely contain meat but definitely do not contain dairy/eggs, while only 2.1% of flexitarians believed this to be the case.

Low understanding and misconception of 'cheesy'



Chart 29: Understanding of the term 'cheesy' in the US (flexitarians, vegetarians, vegans)



In the US, consumers had a different understanding of the term 'cheesy': 27.6% said that 'cheesy' products definitely consist of meat and dairy/eggs, and 21.6% of people thought that the product definitely did not contain meat but might or might not include dairy/eggs. A high percentage of people (21.1%) said that, in the context of the term 'cheesy', the meat/dairy/egg content of the product remained unclear to them.



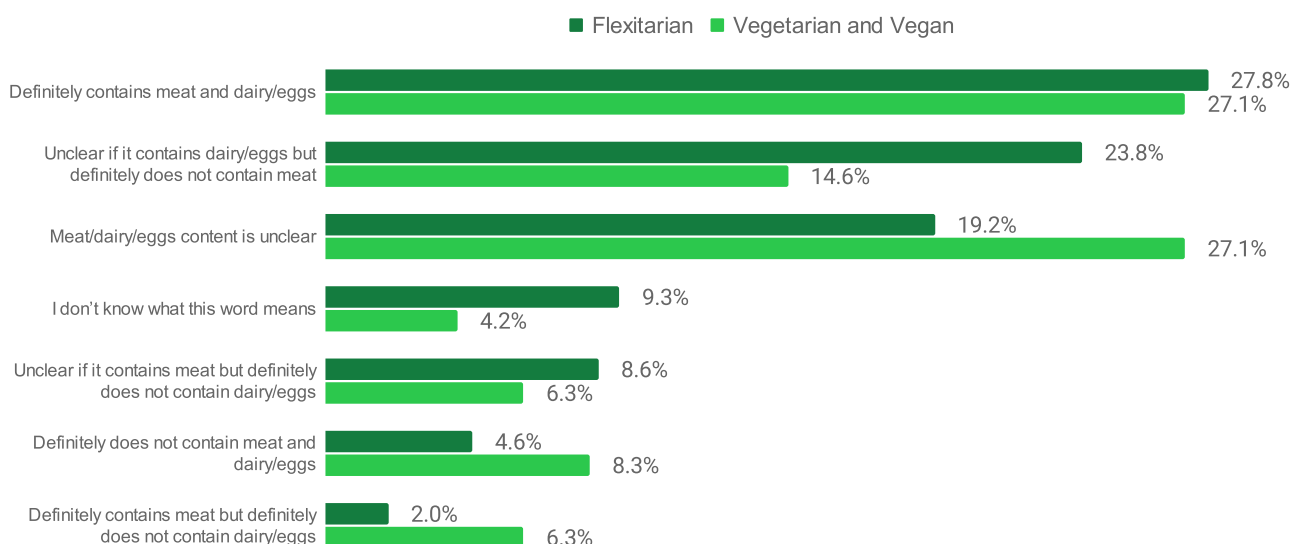
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Low understanding and misconception of 'cheesy'



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Chart 30: Understanding of the term 'cheesy' in the US (flexitarians vs. vegetarians and vegans)



Vegetarians and vegans (27.1%), in particular said that the meat/dairy/eggs content of a 'cheesy' product was unclear to them, while a lower percentage of flexitarians (19.2%) chose this answer. 23.8% of US flexitarians, on the other hand, said that 'cheesy' means the exclusion of meat but that they were unclear about the dairy/egg content. A smaller share of vegetarians and vegans (14.6%) agreed here. The majority of flexitarians (27.8%), vegetarians, and vegans (27.8%) said that a 'cheesy' food product contains meat as well as dairy/eggs.



Summary of understanding of the term 'cheesy'

1. Understanding of the label 'cheesy' was totally different in the UK and in the US. In the UK, 25.4% of consumers said that the meat/dairy/egg content is unclear. In the US, 27.6% of consumers said that the product definitely contains meat and dairy/eggs.
2. Most consumers surveyed believed that a 'cheesy' product does not contain meat, but were unsure about the dairy/egg content of the product. Vegetarians and vegans believed that a 'cheesy' product does contain dairy/eggs, while flexitarians had even less understanding of this term. Thus, when targeting flexitarians using this term as a stand-alone label should be avoided.
3. Since there is much confusion about the term 'cheesy', food producers should be cautious about using the term to describe plant-based food products, since the meat/dairy/egg content is unclear. Consumers might assume that the food product consists of ingredients of animal origin, and therefore rather not consider purchasing it.



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5. KEY TAKEAWAYS & RECOMMENDATIONS

'Vegan' is the most understood term, when it comes to plant-based food products. 69.4% of UK consumers and 61.3% of US consumers understood the term correctly. Food producers should mainly consider this term as a label for food products that do not contain any meat, dairy, and eggs.

➔ There is no need to explain the word 'vegan', but if the food type is known to contain dairy/eggs, it should be mentioned that this version of it does not contain any of these ingredients. Vegetarians and vegans, in particular, lack an understanding of this term.



About half of the consumers surveyed (50.3% in the UK and 49.2% in the US) understood the term **'plant-based'** correctly. Still, many consumers (17% in the UK and 26.1% in the US) were confused about whether 'plant-based' food products contain dairy/eggs. Food producers should offer more education about the term 'plant-based', explain which ingredients are included and which ones are not included.

➔ Using the V-Label or an extra label with the word 'vegan' brings clarity, since this term is more understood than 'plant-based'. However, since research shows that emphasising the term 'vegan' might also chase away mainstream consumers and flexitarians, the marketing and packaging of products using this label should be targeted to a broader audience.

In the UK, 47% of consumers and in the US, only 37.2% of consumers understood the term **'vegetarian'** correctly. Here, the vegetarian and vegan diet groups had a far better understanding than flexitarians.

➔ To avoid confusion among consumers, only use the term 'vegetarian' for food products that exclude meat but contain dairy/eggs and explain this more visibly. In the UK, flexitarians need more education on this term, while, in the US, consumers have a low understanding of 'vegetarian' overall.



5. KEY TAKEAWAYS & RECOMMENDATIONS



Only 39.4% of UK consumers and 30.7% of US consumers got the definition of **'dairy-free'** (partly) right. Consumers are not used to using the term 'dairy-free' and need further clarification from food producers. In the UK and the US respectively, 72.6% and 75.4% of consumers understood that a 'dairy-free' food product does not contain any dairy. Still, these consumers were unclear about the meat content, which is why food producers should add clarification about the inclusion or exclusion of meat in the product.

➔ If the product is normally known to contain meat, the term 'meat-free'/'meatless' can be used to highlight the exclusion of meat, but again, only when accompanied by the term 'vegan' or 'plant-based.'

74.9% of UK consumers and 76.8% of US consumers understood that a **'meat-free/meatless'** food product does not contain any meat. Opinions about the dairy/egg content varied a lot in the two countries and for the different dietary groups. Most people (48.5% in the UK and 49.2% in the US) said that the dairy/egg content is unclear. To avoid misconceptions or people not trusting the ingredients of their products, food producers should label their products in a more detailed way. If the product does not contain dairy/eggs as well as not containing meat, it should be labelled 'vegan' or 'plant-based.'

➔ If the product is normally known to contain meat, the term 'meat-free'/'meatless' can be used to highlight the exclusion of meat, but again, only when accompanied by the term 'vegan' or 'plant-based.'



5. KEY TAKEAWAYS & RECOMMENDATIONS



The majority of consumers (53.3% in the UK and 67.4% in the US) understood that a **'meaty'** food product definitely contains meat, while the dairy/eggs content was unclear.

➔ Food producers should offer more clarification about whether the meaty ingredient is plant-based or of animal origin and if there is any egg/dairy content.

Understanding of the label **'cheesy'** is totally different in the UK and in the US. In the UK, 25.4% of consumers said that the meat/dairy/egg content was unclear while 21.5% said it definitely does not contain meat but might contain dairy/eggs. In the US, 27.6% of consumers said that it definitely contains meat and dairy/eggs while 21.6% said it might contain dairy/eggs.

➔ This term should only be used in conjunction with additional information or an explanation (plant- or animal-based, content of meat, etc.), while, at the same time, consumers are in need of more education around what this term is meant to convey.



6. ABOUT PROVEG

OUR VISION

A world where everyone chooses **delicious and healthy food** that is good for **all humans, animals, and our planet**.

OUR MISSION

Reducing the global consumption of animals by 50% by 2040.

In order to achieve this, we work with mission-aligned companies and offer them support in three key areas:

REPUTATION | REVENUE | IMPACT

WHO ARE WE?

ProVeg is an international food awareness organisation working to transform the global food system by replacing conventional animal-based products with plant-based and cultured alternatives.

ProVeg works with international decision-making bodies, governments, food producers, retailers, investors, the media, and the general public to help the world transition to a society and economy that are less reliant on animal agriculture and more sustainable for humans, animals, and our planet.



WHO DO WE WORK WITH?

As a leading NGO in the alternative-protein space, we have no commercial agenda. This allows us to provide objective expert advice and help support you successfully and effectively by harnessing the power and profitability of the shift to plant-based eating, in the most appropriate way for your business.

We work with companies along the entire value chain, which gives us unique insights into the key challenges, hurdles, and opportunities at every stage of the journey as you take your product to market.



OUR NETWORK

Our B2B community

12,058+

subscribers across
our international
newsletters

400+

delegates at
the New Food
Conference 2021

45+

startups
supported by the
ProVeg Incubator

14,258+

LinkedIn followers

Our B2C community

23,000+

consumers in our
Test Community

88,000+

followers across
our international
Instagram
accounts

410,000+

subscribers
across
our international
newsletters

350,000+

people signed
up for the Veggie
Challenge so far



OUR TEAM

Stephanie Jacznikowska-McGirr

International Head of Food Industry & Retail

Katleen Haefele

Head of Food Services & Events

Dirk Liebenberg

Senior Project Manager

GET IN TOUCH

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