

veylinx

# PROTEIN SHAKE-UP?

Which alternatives will take over  
U.S. menus and meat counters

May 2022



# Key Findings



01

Plant-based proteins with meatlike properties emerge as favorite alternative



02

Even niche proteins like microalgae and insects drive purchase interest

03

Naming matters: "Meatless" beats "Vegan" and others when it comes to labels



04

Younger consumers favor government policies to shift consumption habits



# About the study

The study measured demand for seven proteins across seven different formats

## 7 PROTEINS



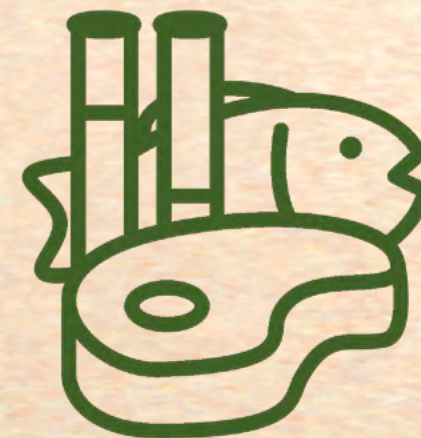
Animal-based



Plant-based with Meatlike Properties



Conventional Plant-based



Cultivated Meat/Fish



Mycoprotein



Microalgae



Insect

## 7 FORMATS



Burger patties



Sushi



Nuggets



Filet Mignon



Jerky



Bacon



Lasagna

The research was conducted in March 2022 among 3,538 U.S. consumers over the age of 18.



# The study also tested:

 Popular brands of plant-based burger patties

 Naming conventions for veggie dogs

 How messaging affects demand for beef

**Meat-Free**  
**Hot Dogs**  
**VEGGIE DOGS**  
PLANT-BASED  
**HOTDOGS**



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# About the methodology

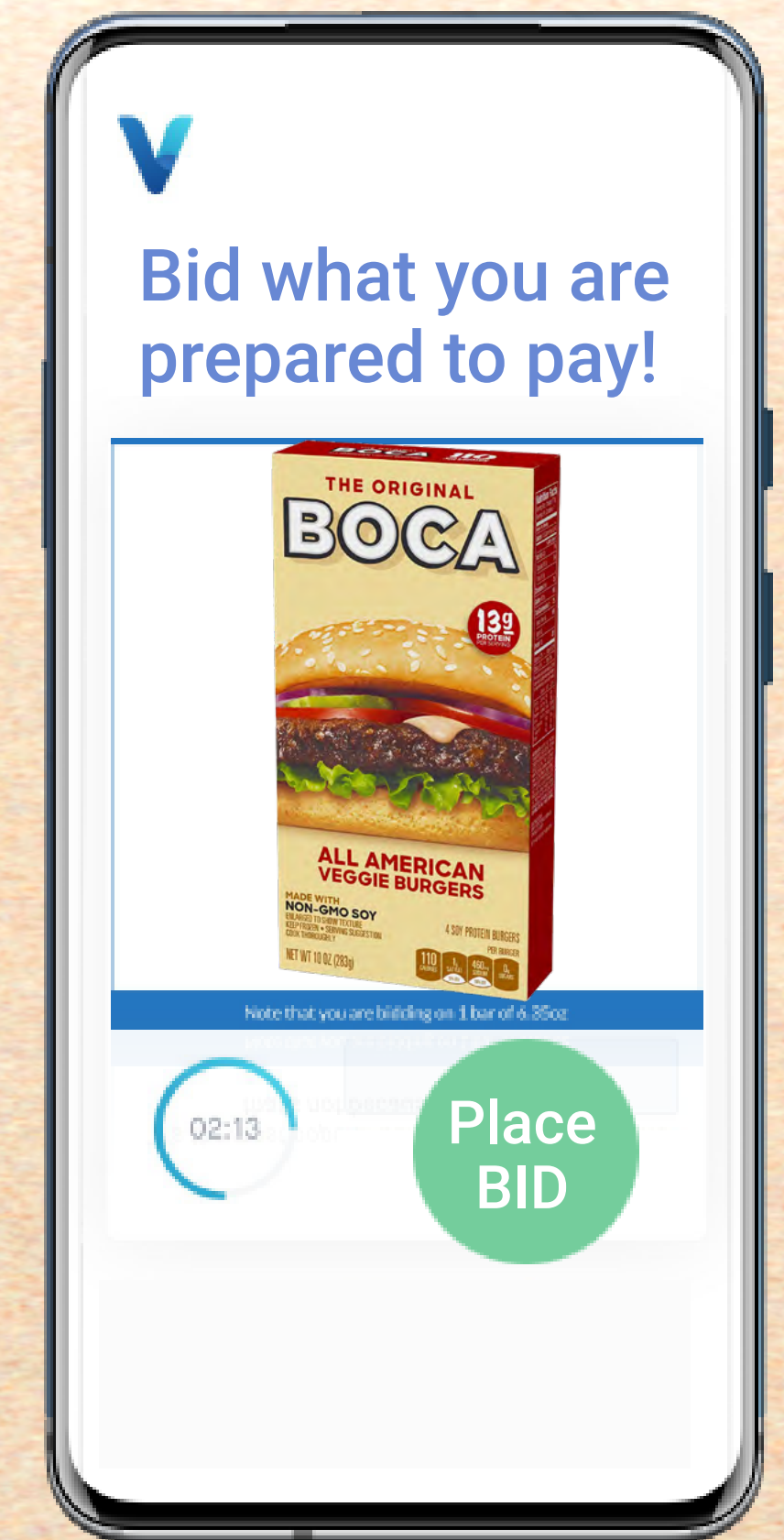
The research used Veylinx's unique methodology to measure actual consumer purchase behavior instead of intent. This is summarized in the **Demand Score**, a proprietary metric developed by Veylinx to predict the performance of a product or innovation.



Participants placed a single sealed bid using their own real money on the products being tested.

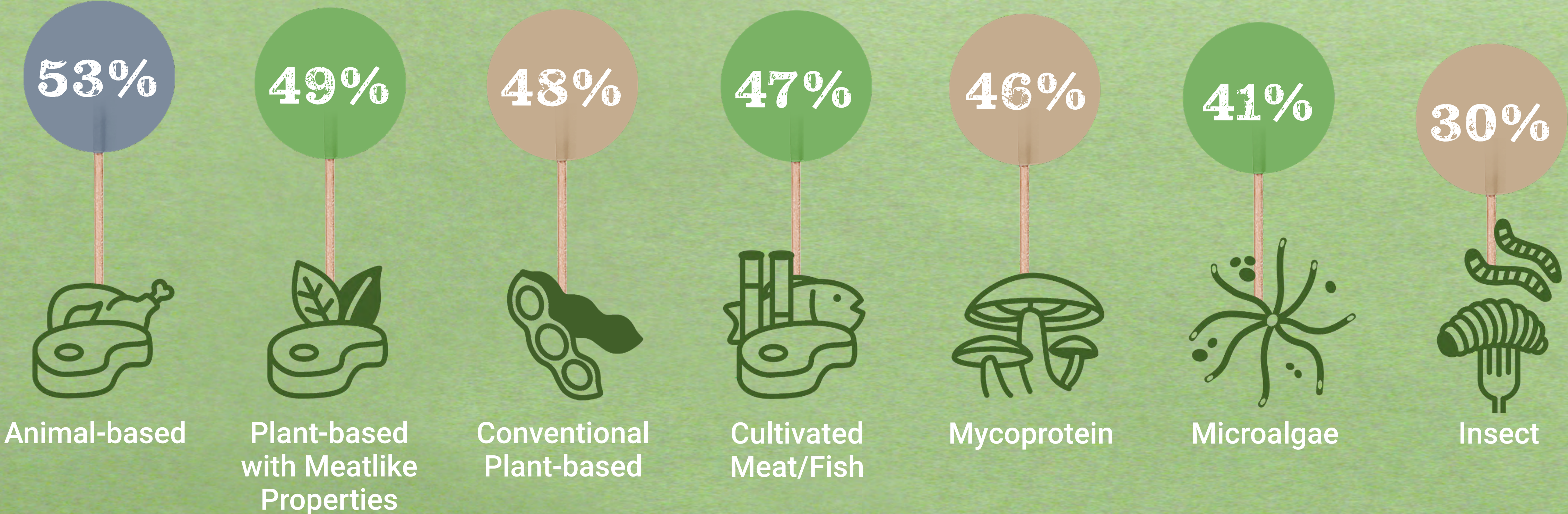


Participants next answered a series of follow-up questions about their preferences, perceptions and purchase behavior.



# Ranking of proteins across all formats

Animal-based proteins lead in purchase interest, but alternatives trail closely



Percentage of study participants who placed a positive bid for a product based on a particular protein



# Highest-ranking alternative protein for each format

Consumers show diverse preferences for substitutes depending on format



Percentage of study participants who placed a positive bid for a product based on a particular protein



# Veggie Burger brands ranked by demand score

Amy's Kitchen and Sweet Earth outperform competitors



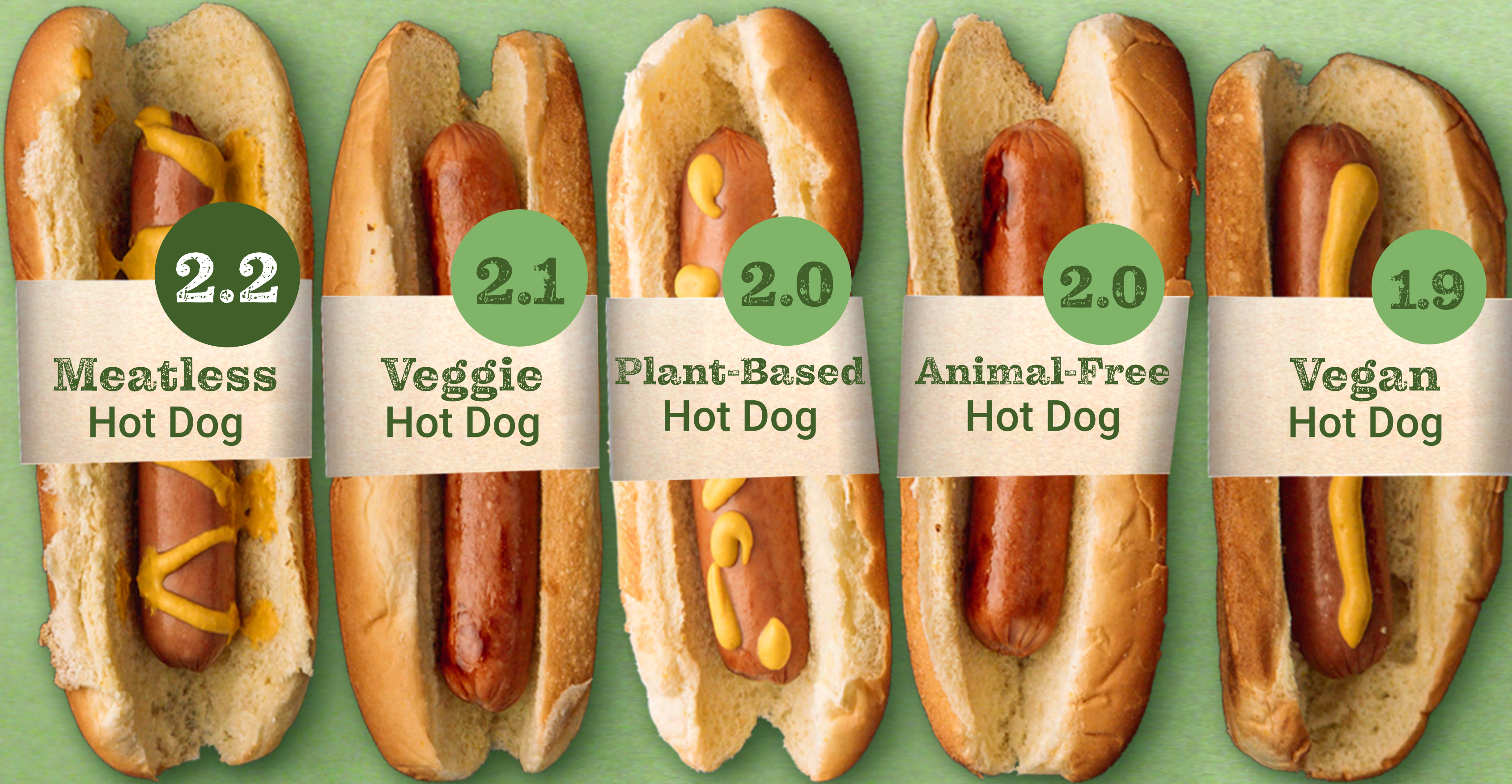
Ranked by Demand Score for each product





# How does labeling affect demand?

Calling a hot dog “Meatless” instead of “Vegan” boosts demand by 16%



Ranked by Demand Score for each product



# Demand drivers for alternative proteins

Improved taste and lower cost offer greatest opportunity for convincing consumers to switch

## Reasons consumers buy alternative proteins

Healthier alternative	42%
Taste	35%
Animal welfare	29%
Natural ingredients	29%
Better for the environment	28%
Suits my lifestyle	18%

## Reasons consumers would buy alternative proteins more often

Improved taste	35%
Lower cost	28%
More natural ingredients	23%
Greater evidence that they're healthier	22%
Improved nutrition	20%
Better texture	19%
Less processed ingredients	18%
Greater evidence that they're better for the planet	16%
A stronger personal commitment to animal welfare	14%



# Impact of health, environment and animal welfare

When consumers were shown messaging about the negative effects of meat consumption, demand dropped



Decrease in purchase interest



# Meat taxes and subsidies for alternatives

Gen Z consumers show much stronger support for policy changes favorable to alternative proteins

Would you support an extra 10% tax on meat to reduce consumption?

	All	Gen Z
<b>Yes</b>	<b>37%</b>	<b>62%</b>
<b>No</b>	<b>63%</b>	<b>38%</b>

Do you think that the government should subsidize meat alternatives to reduce their price and stimulate innovation?

	All	Gen Z
<b>Yes</b>	<b>51%</b>	<b>71%</b>
<b>No</b>	<b>49%</b>	<b>29%</b>



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This summary report represents an  
excerpt of the full research results.  
For the complete findings or more  
information about the study, please  
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Veylinx is the most realistic behavioral insights platform for confidently answering critical business questions during all stages of product innovation.

To reliably predict demand, Veylinx captures insights through a Nobel Prize-winning approach in which consumers have real skin in the game. This is a major advance from traditional market research practices that rely on what consumers say they would hypothetically buy.

Veylinx's unique research methodology is trusted by the world's most innovative consumer goods companies, including Unilever, PepsiCo, Nestlé, General Mills, Reckitt and Kimberly-Clark.

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