







THE RISE OF MEAT-FREE

Brands Change What We Eat





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Introduction

WELCOME TO VISION ONE

We are a strategic insight discovery agency with a passion for brands, communication and innovation.

Vision One are one of the UK's fastest-growing specialist strategic insight agencies, and are three time winners of The Drum's Best Market Research Agency.

We are a team of experienced, multidisciplinary research experts with a proven track record. Our mission is simple, "to discover new insights that will help organisations improve their understanding to profit through intelligent business and consumer research".

We help brands across the world make better decisions by enriching them with powerful insights and a deeper understanding of their markets, customers and culture. We have an extensive NPD programme to develop new techniques and superior insights and we constantly invest in our products every year.

As a globally recognised ISO 20252:2012 accredited company, we adhere to the highest quality standards, and we are proud to be just one of a small number of market research companies around the world to have achieved this accreditation.

We are committed to becoming one of the UK's most sustainable insight agencies and have signed up to the MRS Net Zero Pledge with the goal of becoming Carbon Neutral by 2026.

THE AUTHORS



EVIE BRADBURY

Evie Bradbury is one of the latest experts to join Vision One's Brand Tracking team, bringing a wealth of experience in brands, neuroscience and eye tracking.



TONY LEWIS

Tony Lewis FCIM MMRS is the CEO of Vision One with a career of over 30 years in research and marketing. He specialises in brand & communications research and is the brains behind our highly successful BrandVision.



MEASURING YOUR BRAND

BrandVision is a powerful strategic brand tracking system. Unlike traditional brand tracking programmes, BrandVision focuses on the metrics that can drive growth, providing a brand health check and a vision for the future.

Following intensive development and accumulating over 20 years of experience in brand research, BrandVision sets new standards in Brand Equity measurement.

It was built on new and innovative thinking along with the best tried and trusted models of brand health from Research, Psychology, Marketing, Behavioural Economics and System 1 thinking. Focused on business success and tailored to the needs of a brand.

BrandVision

Designed for brand owners and marketers, BrandVision is for those to understand the 'big picture' and how their brand sits alongside competitors. BrandVision provides clear strategic insights, allowing the necessary actions to be implemented whether you're a tech start-up, a unicorn or a major international corporation.

BENCHMARK FOR SUCCESS

One of the unique features and advantages of BrandVision is the brand database. We have compiled an extensive dataset of brands across a range of verticals, including digital brands and services. Our database is frequently unravelling new insights and helping clients to better understand how brands grow.

Our BrandVision database creates norms on a wide range of metrics – allowing us to compare our clients' brands across markets to better analyse where their strengths and weaknesses really lie.



THE BUILDING BLOCKS OF A STRONG BRAND

Our Brand Wheel is made up of nine key metrics which focus on three key themes of Saliency, Utility and Relationship.

1. Brand Saliency

Brand Saliency marks the start of a customer's journey. How aware are they of the brand? Do they have interest or consider the brand? Brand Momentum is an essential part of brand health and the direction the brand is heading and highlights the potential of the brand in the future.

2. Brand Utility

Brand Utility refers to how brands are perceived. This includes a wide range of important dimensions from Brand Fame to adding value. A key goal of this is to also look into brand proposition and positioning.

3. Brand Relationship

Brand Relationship answers key questions in brand equity such as; Are customers loyal? Are they likely to recommend the brand? What emotions does the brand evoke? All of which are key drivers of loyalty.



The Brand Equity Wheel
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THE STORY SO FAR...

The Market

The meat-free market isn't new. Quorn launched its first product in 1985, followed by Linda McCartney in 1991. In recent years, the plant-based movement has undergone significant evolution, although still niche compared to meat consumption, it is witnessing extraordinary growth.

The Drivers

So why have meat-free products witnessed such a surge? Several factors are contributing. Firstly, the news has placed climate change at centre stage, and people are willing to play a part in thwarting this pressing issue by changing their diet. Furthermore, meat-free analogues have significantly improved - texture, taste and quality have become less of a compromise.

Core Consumers

The rise of the 'flexitarian' is cited as a significant group behind the plant-based movement - as well as the increasing number of consumers participating in Veganuary. In addition, Gen Z and Millennials are passionate about protecting the fragile eco-system and more health-conscious than previous generations.



THE VEGETARIAN BUTCHER

Jaap Korteweg, nearly 25 years ago felt that slaughtering animals for meat was wrong. In 2010, he launched the Vegetarian Butcher brand, and two years later was awarded the 'Most animal-friendly company of the year'.



LINDA MCCARTNEY'S

A brand with longevity, starting out nearly 30 years ago when vegetarianism and veganism were not the mainstream they are today. They promote a strong social responsibility and their product uses soy.



BEYOND MEAT

BEYOND MEAT

The company was founded by Ethan Brown in 2009 to combat climate change. The brand focuses on creating products which protect the planet, preserve natural resources and animal welfare.



QUORN

A brand steeped in history dating back to the 1960s when Lord Rank had a vision to protect the world and combat food shortages. Quorn uses a unique fermentation process, creating mycoprotein from Fusarium (fungi).



MEAT-FREE: A LIFESTYLE CHOICE?

Meat-free eating has become one of the hottest topics across social media and news feeds. While the trends driving plant-based expansion existed before Covid-19, it has since been on an upward trajectory. The pandemic highlighted food safety in the supply chain and the environmental impact of eating a meat-based diet. This disruptive force has paved the way for meat-free eating to become mainstream, a lifestyle diet and no longer reserved for die-hard vegans.

A combination of ethical, environmental and health concerns are proving to be a powerful force in the adaptation of a more plant-based centric diet. The industry is responding to this surge, with retailers offering significantly more shelf space and some even placing meat alternatives next to the meat products.

Restaurants offering extensive meat-free alternatives and some even becoming plant-based centric, such as the recent announcement by The Alchemist. Their new menu is now 58% vegetarian, 38% gluten free and 44% vegan to cater to the increase in meat reducers.

According to our insights, almost half of the UK (43%) plan to eat more plant-based food this year.

“More than 629,000 people from 228 countries and territories officially signed up to try vegan for 31 days, making Veganuary 2022 the biggest ever”*

The burgeoning world population is also causing concern about food shortages and the necessity to seek alternatives outside a traditional meat-based diet, especially with the East adopting a more Westernised meat centric diet.

The success in the meat alternatives market lies within innovation to continually address barriers such as taste and texture - often cited as inferior to the meat equivalent. Current plant-based alternatives use various ingredients such as soy, pea, potato, rice protein, mung bean or mycoprotein (Quorn).

Brands are continually innovating to create the perfect substitutes and increase the repertoire of products and eating occasions to entice regular meat eaters. But can these meat alternative brands compete with the cellular agriculture sector?

“The UK is the largest market in Europe for consumption of plant-based alternatives, accounting for around 40% of the European meat substitutes market”**





Saliency

TOP OF THE FUNNEL METRICS

Mindshare

This is a measure of Brand Awareness. It combines three awareness metrics in one, the most important being spontaneous first mention.

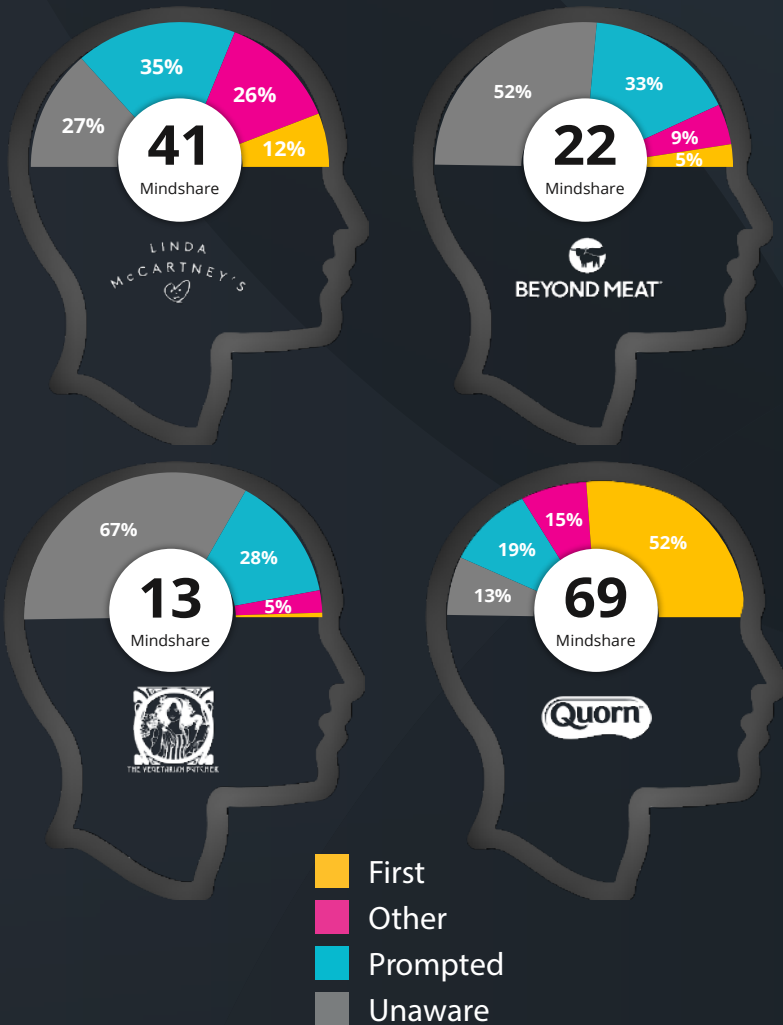
Interest

Brand Awareness is not enough for any brand to survive - it must be relevant and of interest to the customer. Interest is part of the classic 'Brand Funnel' and in some ways is much more important than Awareness.

Momentum

The potential for growth is measured by Momentum. Collectively we all have a sense of how brands are doing - we are attracted to the new and avoid those in decline.





MINDSHARE

Quorn is the market leading meat-free brand when it comes to awareness. Its exceptionally high Mindshare score places it significantly above the normative average (24%), with an impressive 52% spontaneous awareness and 19% prompted. It's the dominant brand and the most familiar amongst plant-based consumers and non-dieters.

Quorn's high Mindshare score should not be underestimated, positioning it close to some of the strongest brands we've ever recorded, including Tinder, Kellogg's Corn Flakes and Special K.

Linda McCartney's Mindshare score shows despite being an established brand in the sector (sitting well above the normative average), it is less dominant. With spontaneous awareness at just 12%. It's less visible and consumers may be losing interest.

Beyond Meat and The Vegetarian Butcher both have scores below the normative average - spontaneous awareness is low. But with strong prompted awareness, these brands are showing signs of movement.

Prompted awareness of Beyond Meat is 33%, (and significantly higher amongst the 18-34 demographic), a promising score that makes this a brand to watch.

The Vegetarian Butcher is the weakest brand. 67% are unaware of its presence in the sector. This indicates it will need to work hard to compete in this growing market.

Increasing awareness levels is vital for both Beyond Meat and The Vegetarian Butcher, both brands will need to improve their relevance and interest to stimulate trial.

57% of people associate Quorn as the first meat free alternative brand they think of in the sector





BRAND FUNNEL

The Brand Funnel indicates where customers are in their journey to becoming brand loyalists and promoters.

Quorn has the strongest brand funnel, with high conversion from awareness through to loyalty it also has the highest loyalty score in the sector, this reinforces its position as the market leader. Again, its funnel mirrors some of the strongest brands from other sectors like Tinder in the online dating market.

Linda McCartney's funnel indicates some problems. Awareness may be high, but interest are much lower than Quorn. Consumers are not converting as well as they could do.

This implies something is lacking in the product itself or consumers' relationship with the brand. e.g. interest amongst the older demographic is high, but once tried, 69% of 55+ are less likely to be satisfied.

Beyond Meat is one to watch. Given its relatively low awareness, it has strong interest levels and conversion to trial, satisfaction and loyalty. This implies it is connecting well with its target market and aligning with their needs.

The Vegetarian Butcher is also interesting. With its low levels of awareness and trial, satisfaction are relatively high. Loyalty may strengthen with increased awareness.

Non-dieters are as likely to be satisfied with all 4 brands as vegans and flexitarians. Suggesting that converting meat eaters will be key, once they try 'meat-free' they are likely to buy again.

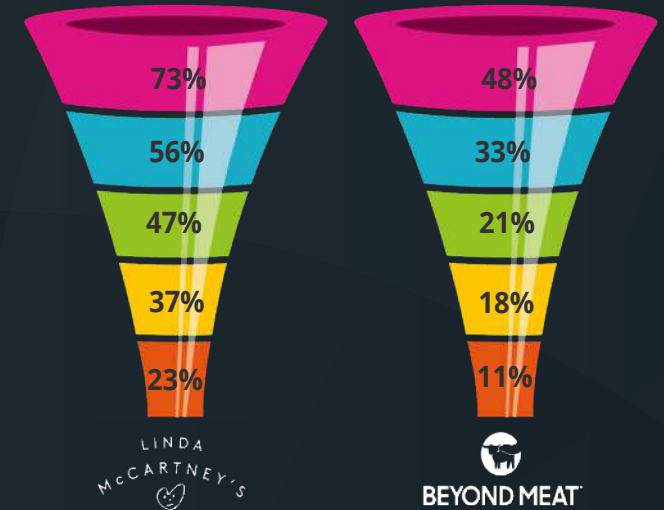
Awareness

Interest

Trial

Satisfied

Loyalty



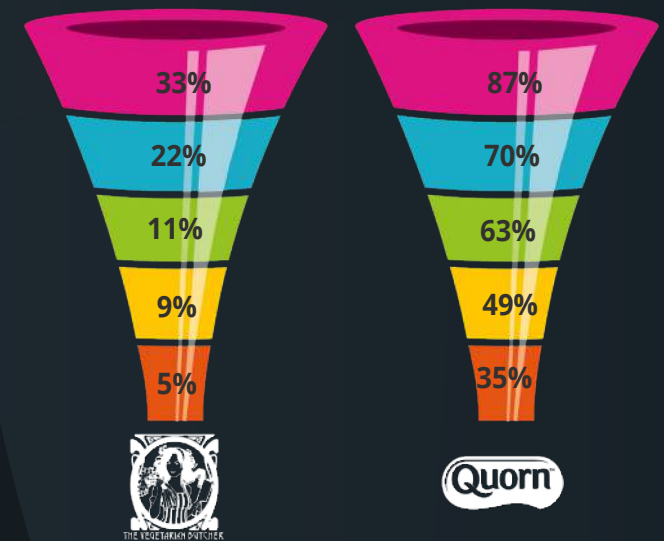
Awareness

Interest

Trial

Satisfied

Loyalty



MOMENTUM

Measures the direction a brand is seen to be moving in and is an excellent predictor of short-medium term potential.

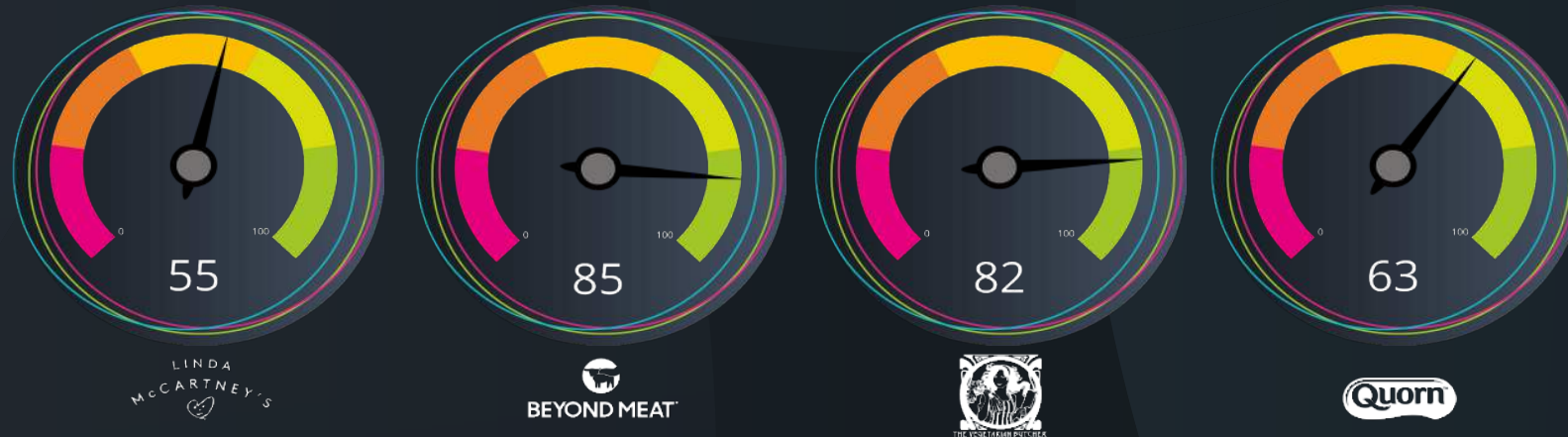
Beyond Meat is the brand with the highest Momentum score (85) and perceived to be growing the most. This score may have been boosted by their recent collaboration with a fast food chain such as KFC and McDonald's, but the correlation between a high momentum score and future purchase intention shows great promise for this brand.

With the second highest Momentum score, The Vegetarian Butcher is also signalling growth. Flexitarians in particular were significantly more likely to see this brand as growing (72%), suggesting the brand is connecting well with this demographic.

Quorn, despite being the market leader, it is perceived to be stable rather than growing. Non-dieters in particular are less likely to see Quorn as growing. Given their extensive range, this score indicates their lower perceived growth stems from something else.

Linda McCartney's is losing momentum. Brand awareness may be strong, but with the lowest Momentum score this brand could soon be perceived as declining. As it stands, it shows signs of being under threat.

With less experience of the meat-free sector than plant-based consumers, non-dieters perceive all brands as having lower momentum. All four brands need to work harder to engage meat eaters and successfully convey their brand proposition.

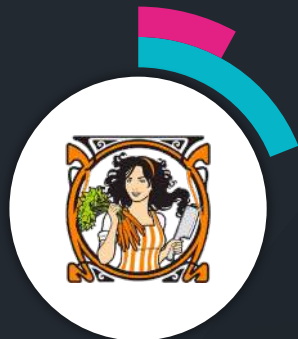




Recognised 39%
Brand Identified 34%



Recognised 24%
Brand Identified 8%



Recognised 19%
Brand Identified 8%



Recognised 18%
Brand Identified 7%

Recognised = Have seen the brand's logo before
Brand Identified = Correctly named brand's logo

LOGO RECOGNITION

It is important for brand to build brand loyalty, a proven way of doing this is showing the strength of a brand.

Quorn is the most widely recognised brand. It's likely its score is boosted by their extensive portfolio of products. However, compared to other sectors, such as cereals, logo recognition is still relatively poor.

Despite being a well known brand, Linda McCartney's logo recognition is the lowest of all, suggesting the brand may lack distinctiveness. Consumers can't easily visualise Linda McCartney's and may struggle to recognise it in store. This brand will need to quickly address its marketing and branding strategy to boost its brand identity.

Beyond Meat is the brand to watch. It's newer to the market but with the second strongest logo recognition, it's clearly making an impact on the shelf.

Of all four brands, Quorn was the logo that non-dieters recognised the most. This is consistent with its high Mindshare score and position as market leader.

All four brands need to work harder to engage non-dieters to attract interest and encourage trial.



Utility

FUNCTION, ATTRACTIVE, OR INEFFECTIVE?

Brand Needs

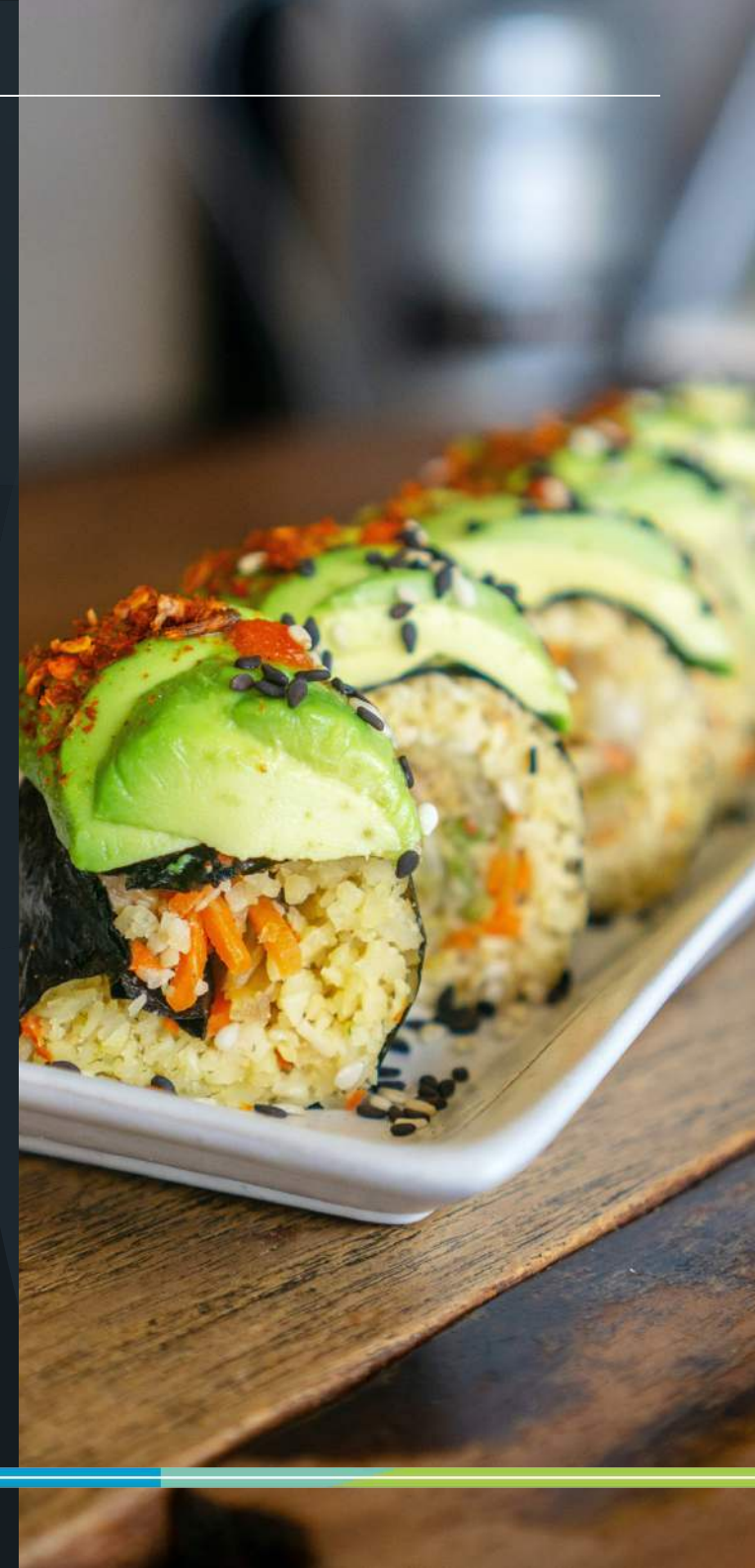
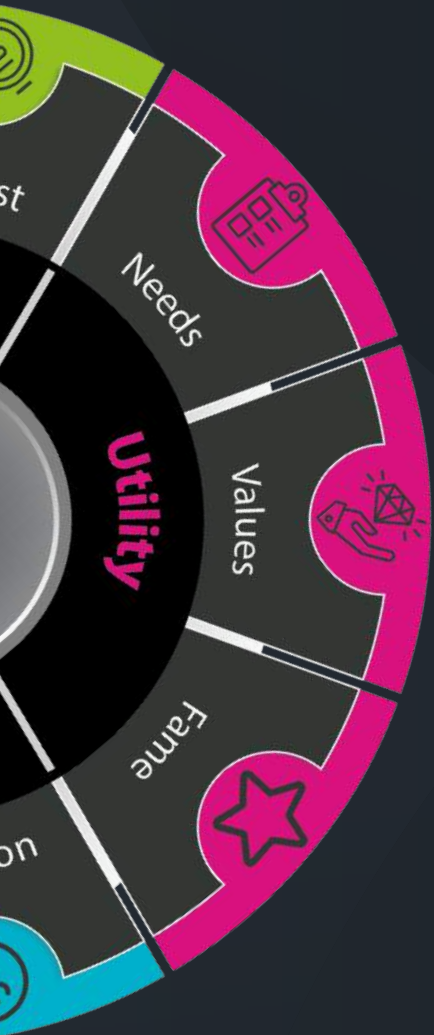
This refers to how well a brand is associated with the Needs and Values of both the needs and values of the customer and the market as a whole. The strongest brands not only deliver on the most important Needs, but they also implement additional benefits some benefits which are also unique to help differentiate from competitors.

Signals

The eight Signals are Performance, Ethical, Value For Money, Accessible, Service, Attraction, Active and Identity. They have been carefully chosen because they are attributes that can transcend most markets and brands.

Fame

This is made up of two key metrics which are combined to create the Brand Fame score. The first metric assesses whether the brand is seen as a Leader, Innovator, or a large and established. The second is Different in order to determine if the brand is thought to be sufficiently differentiated from the competition. Strong brands have high Brand Fame scores and tend to be less vulnerable to competition.





BRAND NEEDS

All brands score highly within Wellness - the strongest need within the sector. Vegans are significantly more likely to see Linda McCartney's as good for you (Wellness), compared to The Vegetarian Butcher. This may be because vegans feel less aligned with The Vegetarian Butcher brand name and connotations with the word 'butcher'.

As a market need, Innovation is important. It implies 'pioneer' and a focus on the product itself. But only Beyond Meat and The Vegetarian Butcher are associated with fulfilling these needs.

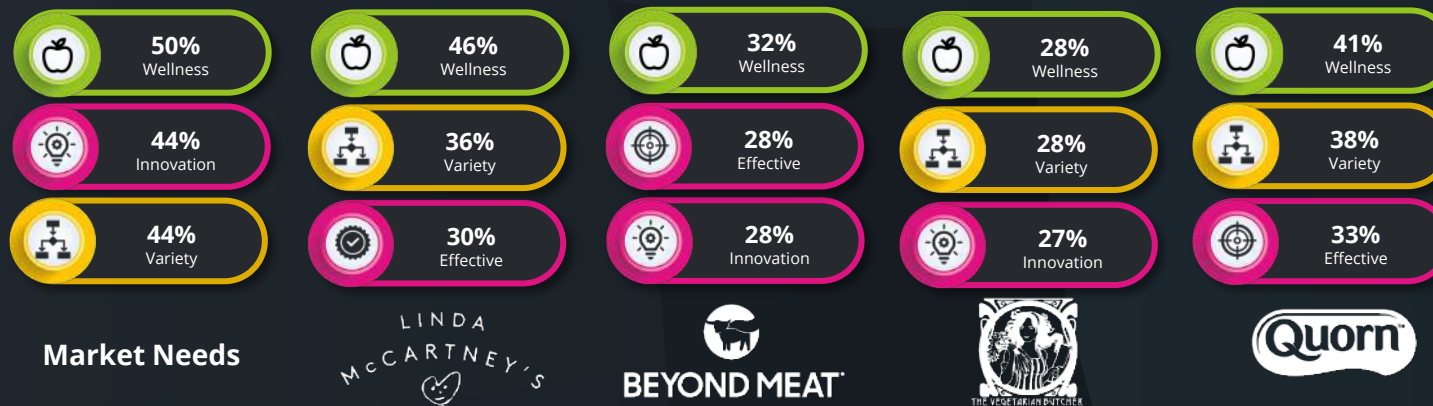
Despite scoring well on Variety, Quorn will need to address its lack of Innovation if it wants to maintain its position as market leader. It may well be a contributing factor in Quorn's low Momentum score.

Beyond Meat is the brand to watch - if they can increase their range they will fulfil the top three market needs.

Non-dieters are less likely to see plant-based brands as Effective. Given this is the fourth most important market need, brands have to work harder to convince them to transition to a more flexitarian diet.

Innovative brands like Beyond Meat and The Vegetarian Butcher may be best placed to win over non-dieters and flexitarians - focusing on developing products that more closely resemble real meat.

"By the end of this year, it is predicted 13 million Brits will be meat-free"



SIGNALS

Beyond Meat is associated most with performance, ethical and attraction. It is the only brand with performance as its top signal.

This suggests it is seen as a desirable brand that delivers - conveying health and social responsibility whilst also creating an appealing product.

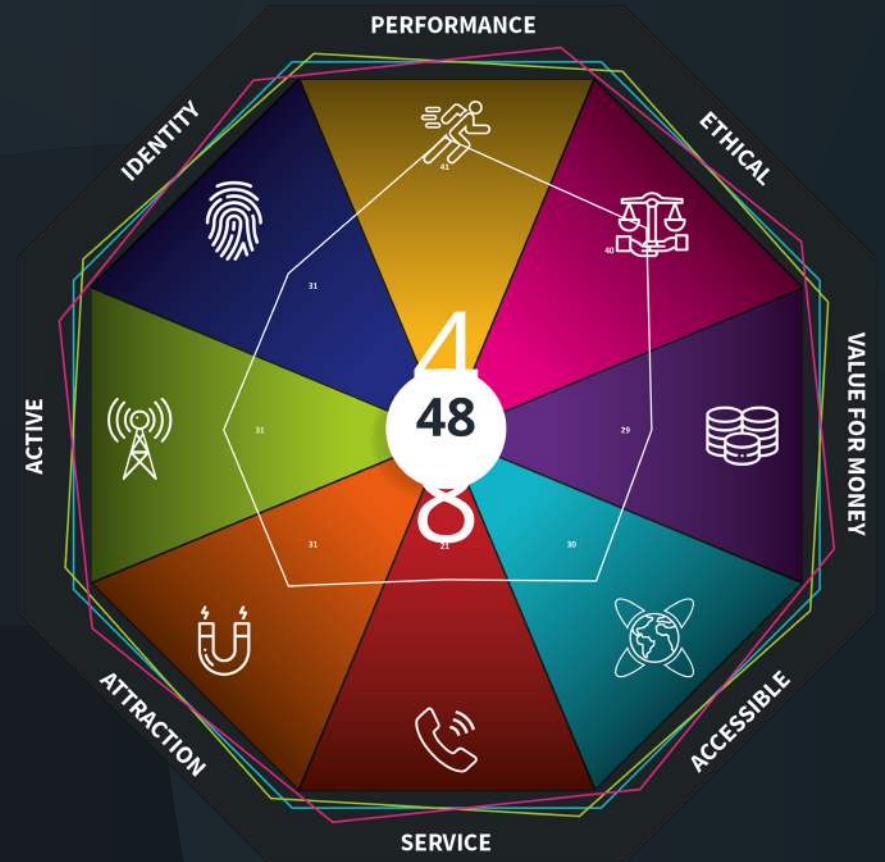
However it's associated less with being value for money - it may need to strengthen its brand proposition to convey its value, or price itself more competitively.

Younger consumers are more likely to see Beyond Meat as ethical. This may be because they are more familiar with the brand and more aligned with its brand values and proposition.

Linda McCartney's and Quorn's key Signal Accessibility. This reflects the fact they are established brands, both brands are more widely available in store.

The Vegetarian Butcher's strongest signal is 'Ethical' suggesting they are developing a distinctive brand identity with sustainability and social responsibility at its core.

For all four brands, the weakest Signal is 'Service'. An area that needs attention to maintain Customer Satisfaction.



BEYOND MEAT





FAME

Represents the position of a brand in the customer's mind. There are two aspects to this: Uniqueness and Distinctiveness (different) and Brand Leadership (Leader). Brands that don't have strength in either of these attributes tend to be weaker and vulnerable.

Consistent with its 'stand out' Mindshare result, Quorn holds the top Fame score - its position as market leader is clear. However, Quorn is seen to be less different than all three of its competitor brands. There is a risk it could be perceived as generic, consumers could lose interest and shift loyalty to emerging brands.

The Vegetarian Butcher appears to be well differentiated within the market, with the highest 'Distinctive' score. As a lesser well-known brand, consumers perceive it to be new and different.

Beyond Meat performs particularly well given its relatively new to the market. With the same Fame score as Linda McCartney's, it scores highly on both 'Leader' and 'Different'. This is consistent with its high Momentum score - Beyond Meat is seen to be a brand on the up.



- Leader
- Different
- Overall Score



Emotion

HOW CONSUMERS FEEL ABOUT A BRAND

Emotion is at the heart of all brands. Analysis of our brand database has highlighted the importance of Emotion which is THE driver of other two Relationship metrics: Loyalty and Net Promoter Score.

ROBERT PLUTCHIK WHEEL OF EMOTION

The Wheel of Emotion is the work of US psychologist Dr. Robert Plutchik. According to his theory, all 34,000-odd emotions can fall into one of eight main feelings.

Think of your emotions as a colouring book. Each main emotion is a different picture within the book, but look closer and you'll see that each emotion is made up of lots of smaller 'sub-emotions' – the sections you colour in in order to create the bigger picture. This approach enables a much granular view of each emotion and its component parts.





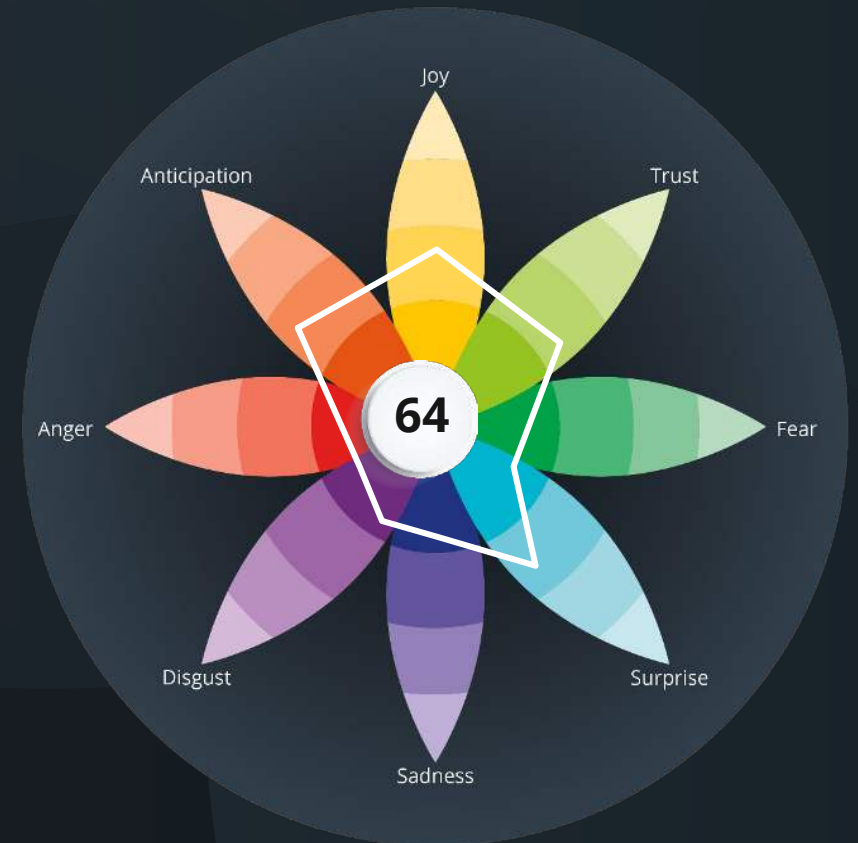
EMOTION

Beyond Meat has the highest Positive Emotion score of 64 (sitting close to top brands from other sectors, like Weetabix and Kellogg's). It also has the lowest negative emotion score at just 3%.

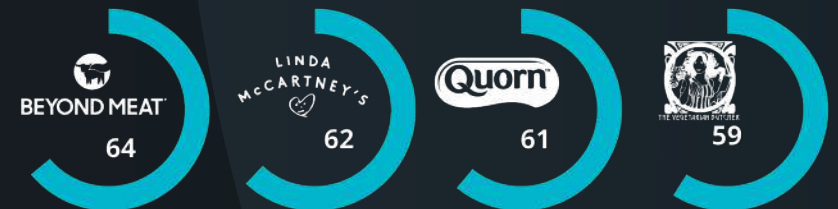
Mirroring their strong performance score, Beyond Meat has clearly developed a deep, positive emotional connection with consumers. On multiple levels, this is likely to nurture trust and loyalty.

Quorn has the highest negative emotion score at 8%, and a significantly higher level of Disgust 6%. This could be because it's the most widely known brand amongst non-dieters and is one of the brands that is deemed to taste and look the least like real meat.

Non-dieters generally feel the most neutral towards all four brands. This could either reflect their impression of meat-free products being inferior to real meat - or their lack of awareness/experience of each brand. Either way, this is a demographic that needs more convincing before they will consider trial.



“Consumers feel most positive towards Beyond Meat”



Brand Proposition

DISCOVER YOUR BRAND'S SECRETS

Whilst the nine metrics on the Brand Wheel, arguably are all integral to strong brand health, arguably one of the most important aspects to BrandVision is its ability to understand the Proposition (i.e. what it means) and its Positioning (i.e. where it sits) in the mind or the customer.

With the highest overall Brand Equity score (62), Quorn is in a healthy position as market leader. The highest recorded score in the UK to date is Cancer Research, with a score of 65. Despite its strong performance on most metrics, Quorn is only perceived as stable rather than growing they and may need to adopt a more innovative approach to shift perceptions and maintain their market leader spot.

Equalling Linda McCartney's brand equity score (57), Beyond Meat is in a healthy position, its a brand consumers feel most positive towards. They are innovative, they satisfy most market needs and perform well across most metrics. Compromising less on looks and taste, this brand is likely to tempt the growing flexitarian demographic. Once they develop a strategy to boost awareness, this brand will be the one to watch.

Linda McCartney's meets key market needs, but some metrics do show signs of concern. This brand is not perceived to be growing, logo recognition is poor (indicating it isn't performing as well as it could on the shelf) and its Brand Funnel show signs of weakness. Left unaddressed, Linda McCartney's may lose market share.

The Vegetarian Butcher has the lowest Brand Equity score, at 52, but it does show promise. Its strong Momentum score, Brand Proposition and ability to satisfy some key Market Needs suggest consumers are beginning to take notice. This brand will need to prioritise awareness to become a real contender.



BRAND PROPOSITION

Our target market rated '100% natural meat-free alternatives', 'meat-free alternatives that look and taste like meat' and 'a brand that makes eating meat-free easy' as the top three propositions in this market.

Despite its low Momentum, Logo Recognition and relatively lower Interest scores, Linda McCartney's does perform well against some of the key propositions and owns the '100% natural meat-free alternative'. But they may need to work on product effectiveness to satisfy consumers' key need for a meaty taste and look.

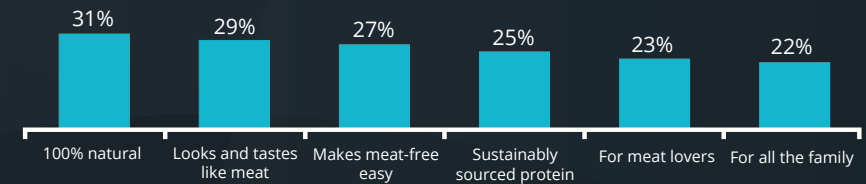
With strong scores across the board, Quorn's strength is its ability to make meat-free easy for consumers, as their product range is unrivalled. But, they too may struggle to entice those looking for a product that closely resembles meat.

Beyond Meat and The Vegetarian Butcher are strongly associated with all key propositions. Their smaller range may make eating meat-free harder, but their products are associated with being the closest meat alternative.

If Beyond Meat can develop a wider product range and focus on raising awareness, it could develop as a strong contender. With flexitarians pushing for meat substitutes

The Vegetarian Butcher has the most work ahead if it wants to compete - it's the least associated with making 'eating meat-free easy'.

MOST APPEALING PROPOSTIONS



STRONGEST BRAND ASSOCIATIONS ARE:



Why is Quorn the winner?

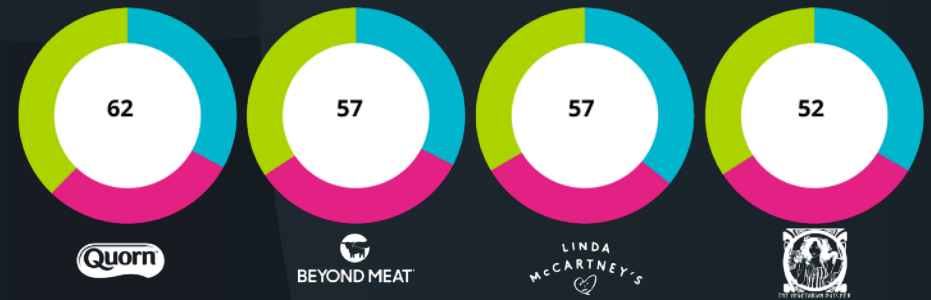
Quorn is a brand steeped in history and it has the highest overall Brand Equity score (62), with a recognisable logo and viewed as a good meat-free alternative for all the family. Its exceptionally high Mindshare score places it significantly above the normative average (24), with an impressive 52% spontaneous awareness and 19% prompted.

Linda McCartney's meets key market needs, but some metrics show signs of concern. This brand is not perceived to be growing, Logo Recognition is poor, and its Brand Funnel conversion rates show signs of weakness. Left unaddressed, Linda McCartney's may lose market share. 55% of vegans see Linda McCartney's as the leader (compared to 42% of flexitarians and 38% of non-dieters). But only 20% of vegans view the brand as unique or different, compared to 32% of vegans and 31% of flexitarians.

Equalling Linda McCartney's Brand Equity score (57), Beyond Meat is in a healthy position - it's the brand that consumers feel more favourable towards. They are innovative, satisfy most Market Needs, and perform well across most metrics. Compromising less on looks and taste, this brand may tempt the growing flexitarian demographic - and once they develop a strategy to boost awareness, this brand could be the one to watch.

The Vegetarian Butcher has the lowest brand equity score at 52, but it does show promise. Its strong Momentum score, brand proposition and ability to satisfy some key market needs suggests consumers are beginning to take notice. But, this brand will need to prioritise awareness to become a real contender.

Non-dieters are more neutral towards all four brands - 43% neutral towards Beyond Meat, 42% neutral towards Linda McCartney's, 45% neutral towards Quorn. This highlights indifference, lack of Awareness and indifference to the brands.





Learn More About Vision One

Over the past 20 years, our award-winning team has been helping hundreds of clients to understand and explore their brands, sector, communications and innovation strategies.

To find out more about this whitepaper, or our market leading BrandVision approach, please get in touch with authors Tony Lewis and Evie Bradbury.

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