

## National Chicken Council: Plant-Based Chicken Label Perception Questionnaire and Data

**METHODOLOGY:** Online survey among the general U.S. population and those with specific diets to identify understand attitudes about traditional chicken compared to plant-based chicken. The survey was fielded in April and May 2022.

- To qualify as the **General Population** respondents must (n=1,000):
  - Live in the U.S.
  - Be over 18 years of age
  - The general population is nationally representative sample based on:
    - Age
    - Region
    - Income
    - Race/Ethnicity
    - Gender
  - Margin or error - +/-3.1%
- To qualify as a **vegan/vegetarian** respondents must (n=200):
  - Live in the U.S.
  - Be over 18 years of age
  - Identify as a vegan/vegetarian
  - Margin of error - +/-6.9%
- To qualify as a **flexitarian** respondents must (n=352):
  - Live in the U.S.
  - Be over 18 years of age
  - Identify as following a flexitarian diet or say they only eat meat rarely or sometimes at meals
  - Margin of error - +/-5.2%

### SCREENERS

S1. What is your age?

	General Population	Vegan/Vegetarian	Flexitarian
Gen Z (18- 24)	13%	19%	14%
Millennial (25-40)	30%	51%	29%
Gen-X (41- 56)	27%	19%	25%
Boomer+ (57+)	30%	12%	32%

S2. Please enter your zip code.

	General Population	Vegan/Vegetarian	Flexitarian
Northeast	18%	21%	20%
Midwest	22%	17%	20%
South	37%	33%	35%
West	23%	30%	25%

S3. What is your gender?

	General Population	Vegan/Vegetarian	Flexitarian
Female	51%	67%	57%
Male	49%	33%	43%
Other	0%	1%	0%

S4. Are you of Hispanic, Latino or Spanish origin?

	General Population	Vegan/Vegetarian	Flexitarian
Yes	15%	17%	14%
No	85%	83%	86%

S5. What is your race? *Please select all that apply.*

	General Population	Vegan/Vegetarian	Flexitarian
White/Caucasian	74%	71%	72%
Black or African American	12%	14%	14%
Native American or Alaskan Native	1%	2%	1%
Asian	5%	9%	6%
Pacific Islander	1%	0%	1%
Other	7%	5%	6%

S6. What is your current employment status? Please select the answer that best describes your status

	General Population	Vegan/Vegetarian	Flexitarian
Employed full-time	43%	53%	38%
Employed part-time	14%	21%	16%
Laid off temporarily	1%	1%	1%
Furloughed	0%	1%	0%
Unemployed	10%	5%	9%
Retired	18%	8%	20%
Full-time student	3%	7%	3%
Full-time homemaker	7%	4%	7%
Permanently disabled	5%	2%	6%
Other, please specify	1%	1%	0%

S7. Which of the following ranges reflects your annual total household income before taxes?

	General Population	Vegan/Vegetarian	Flexitarian
Less than \$25,000	25%	16%	27%
\$25,000 to \$49,999	26%	29%	20%
\$50,000 to \$74,999	19%	28%	19%
\$75,000 to \$99,999	12%	14%	13%
\$100,000 to \$149,999	12%	10%	13%
\$150,000 and greater	7%	4%	7%

S8. Which of the following describes your dietary lifestyle?

	General Population	Vegan/Vegetarian	Flexitarian
Vegan - doesn't eat any animal products	2%	38%	-
Vegetarian - doesn't eat meat products	2%	63%	-
Pescatarian - does not eat any meat products except for fish/seafood	2%	-	4%
Flexitarian - eats mainly fruits, vegetables and grains and limited meat or animal products	16%	-	46%
Standard American diet - regularly eats meats and animal products	77%	-	49%
Other, please specify	1%	-	2%

**SHOW IF S8= Pescaterian, Flexitarian, Standard American, or Other]**

S9. Which of the following best describes how often you eat meat with your meals?

	General Population (n=964)	Vegan/Vegetarian	Flexitarian (n=352)
All the time	24%	-	7%
Most of the time	46%	-	12%
Sometimes	26%	-	72%
Rarely	3%	-	9%
Never	0%	-	0%

**[SHOW IF S9=All the time, Most of the time, Sometimes, or Rarely]**

S10. How often do you eat the following types of meat?

**General Population (n=962)**

	Regularly	Sometimes	Rarely	Never
Chicken	68%	27%	4%	1%
Beef	48%	39%	11%	2%
Pork	27%	40%	25%	8%
Fish/seafood	26%	43%	21%	10%

**Flexitarian (n=352)**

	Regularly	Sometimes	Rarely	Never
Chicken	48%	43%	8%	2%
Beef	19%	53%	23%	5%
Pork	8%	39%	39%	14%
Fish/seafood	26%	43%	22%	9%

**Section 1 – Food Consumption Behaviors**

1. How often do you eat each of the following foods?
  - i. Regularly
  - ii. Sometimes
  - iii. Rarely
  - iv. Never

**General Population**

	Regularly	Sometimes	Rarely	Never
Vegetable meat alternatives – products traditionally made of meat that use vegetables instead but clearly veggie-based (e.g., veggie burgers, cauliflower ‘wings’)	13%	24%	21%	42%
Plant-based chicken products – products meant to imitate the texture and taste of chicken	9%	17%	22%	52%
Plant-based beef products - products meant to imitate the texture and taste of beef	8%	22%	22%	49%
Tofu	5%	14%	19%	62%
Dairy-free ‘milk’ alternatives (e.g. almond milk, oat milk, etc)	23%	23%	18%	36%

## Vegan/Vegetarian

	Regularly	Sometimes	Rarely	Never
Vegetable meat alternatives – products traditionally made of meat that use vegetables instead but clearly veggie-based (e.g., veggie burgers, cauliflower ‘wings’)	52%	32%	9%	8%
Plant-based chicken products – products meant to imitate the texture and taste of chicken	41%	37%	11%	12%
Plant-based beef products - products meant to imitate the texture and taste of beef	42%	30%	18%	12%
Tofu	39%	34%	11%	17%
Dairy-free ‘milk’ alternatives (e.g. almond milk, oat milk, etc)	54%	25%	15%	7%

## Flexitarian

	Regularly	Sometimes	Rarely	Never
Vegetable meat alternatives – products traditionally made of meat that use vegetables instead but clearly veggie-based (e.g., veggie burgers, cauliflower ‘wings’)	16%	33%	20%	30%
Plant-based chicken products – products meant to imitate the texture and taste of chicken	10%	24%	24%	41%
Plant-based beef products - products meant to imitate the texture and taste of beef	10%	33%	20%	37%
Tofu	6%	20%	22%	52%
Dairy-free ‘milk’ alternatives (e.g. almond milk, oat milk, etc)	28%	26%	18%	28%

2. How often do you buy the following foods at the grocery store?

- i. Regularly
- ii. Sometimes
- iii. Rarely
- iv. Never

## General Population

	Regularly	Sometimes	Rarely	Never
Vegetable meat alternatives – products traditionally made of meat that use vegetables instead but clearly veggie-based (e.g., veggie burgers, cauliflower ‘wings’)	11%	22%	18%	49%

Plant-based chicken products – products meant to imitate the texture and taste of chicken	8%	16%	20%	55%
Plant-based beef products - products meant to imitate the texture and taste of beef	8%	20%	19%	53%
Tofu	6%	13%	16%	66%
Dairy-free ‘milk’ alternatives (e.g. almond milk, oat milk, etc)	21%	23%	17%	40%

### Vegan/Vegetarian

	Regularly	Sometimes	Rarely	Never
Vegetable meat alternatives – products traditionally made of meat that use vegetables instead but clearly veggie-based (e.g., veggie burgers, cauliflower ‘wings’)	48%	37%	9%	7%
Plant-based chicken products – products meant to imitate the texture and taste of chicken	46%	32%	11%	11%
Plant-based beef products - products meant to imitate the texture and taste of beef	38%	36%	14%	12%
Tofu	38%	32%	13%	18%
Dairy-free ‘milk’ alternatives (e.g. almond milk, oat milk, etc)	56%	26%	10%	8%

### Flexitarian

	Regularly	Sometimes	Rarely	Never
Vegetable meat alternatives – products traditionally made of meat that use vegetables instead but clearly veggie-based (e.g., veggie burgers, cauliflower ‘wings’)	13%	32%	19%	36%
Plant-based chicken products – products meant to imitate the texture and taste of chicken	10%	22%	26%	42%
Plant-based beef products - products meant to imitate the texture and taste of beef	10%	27%	22%	41%
Tofu	7%	18%	20%	55%
Dairy-free ‘milk’ alternatives (e.g. almond milk, oat milk, etc)	24%	30%	14%	32%

3. How likely are you to purchase a plant based meat alternative over the meat it is meant to imitate?

	General Population	Vegan/Vegetarian	Flexitarian
Very likely	11%	62%	15%
Somewhat likely	20%	22%	27%
Neither likely nor unlikely	23%	12%	24%
Somewhat unlikely	16%	2%	13%
Very unlikely	31%	3%	21%

### Section 2 – Perceptions of Plant-Based Meats

4. How much do you agree or disagree with the following statements about plant-based “meat” overall? **[TOP 2 BOX AGREE]**

	General Population	Vegan/Vegetarian	Flexitarian
“Meat” should be a term that only refers to products made from animals	69%	64%	64%

Brands need to do more to clearly state whether a product is plant-based or not	62%	75%	60%
There should be more regulations from governing bodies on how to label plant-based meats	51%	65%	53%
Eating plant-based meat is better for the environment than eating traditional meat products	44%	77%	55%
It's difficult to differentiate some plant-based meat products with traditional meat products they imitate	37%	58%	40%

**[IF 'AGREE' "difficult to differentiate"]**

5. Why is it difficult to differentiate between some plant-based products and traditional ones?

	General Population (n= 366)	Vegan/Vegetarian (n=115)	Flexitarian (n=140)
Packaging is similar	55%	63%	57%
Names are similar	42%	48%	40%
Near each other in the store	38%	36%	41%
Images on packaging	38%	43%	36%
Other, PLEASE SPECIFY	4%	3%	3%
Don't know	7%	0%	7%

6. Where in the grocery store do you think is the ideal location for plant-based meat products?

	General Population	Vegan/Vegetarian	Flexitarian
Next to other meat products	22%	15%	24%
In a separate section from meat	62%	80%	58%
No preference	16%	5%	18%

7. How clearly do you understand the differences between traditional chicken and plant-based chicken?

	General Population	Vegan/Vegetarian	Flexitarian
Very	38%	57%	34%
Somewhat	41%	37%	43%
Not very	16%	5%	18%
Not at all	6%	2%	5%

8. How much do you agree or disagree with the following statements about plant-based and traditional chicken? *Please note, when we ask about plant-based chicken we are referring to non-meat chicken products meant to imitate the texture and taste of chicken.* **[TOP 2 BOX AGREE]**

	General Population	Vegan/Vegetarian	Flexitarian
I want to make sure I'm clear on if I'm buying plant-based chicken or traditional chicken	80%	85%	79%
Plant-based chicken should have to be clearly labeled as "plant-based"	81%	86%	78%
Chicken as a term should be used for products made from the animal	68%	59%	64%
Plant-based chicken should not be labeled as "chicken"	59%	62%	53%

I have gotten confused about which products are real chicken versus which are plant-based chicken	29%	42%	33%
I've accidentally bought plant based chicken because I thought it was real chicken	21%	28%	23%

9. What do you think is the appropriate word to call plant-based products that look to imitate chicken?

	General Population	Vegan/Vegetarian	Flexitarian
Chik'n	19%	35%	18%
Chicken	14%	20%	15%
Cheeken	10%	10%	11%
Ch'ken	8%	10%	7%
Other, PLEASE SPECIFY	15%	9%	14%
Don't know/No opinion	34%	18%	36%

**[SHOW IF Q1 = REGULARLY, SOMETIMES OR RARELY EAT PLANT-BASED CHICKEN]**

10. Thinking specifically about the differences between traditional chicken and plant-based chicken, how much do you agree or disagree with the following statements? *Please note, when we ask about plant-based chicken we are referring to non-meat chicken products meant to imitate the texture and taste of chicken.* **[TOP 2 BOX AGREE]**

	General Population (n=476)	Vegan/Vegetarian (n=176)	Flexitarian (n=206)
Traditional chicken tastes better than plant-based chicken	58%	37%	50%
Plant-based chicken is more animal friendly	66%	80%	67%
Plant-based chicken is too expensive	55%	48%	53%
I can cook more recipes with traditional chicken than plant-based chicken	53%	37%	51%
Traditional chicken is easier to prepare than plant-based chicken	36%	29%	34%