

KEY TAKEAWAYS:

AWARENESS OF PLANT
BASED MEAT ALTERNATIVES
INCREASED Q/Q, BUT
ENGAGEMENT WITH THE
CATEGORY SLID A TOUCH
Q/Q.

CONSUMERS ARE DRAWN TO
IT BECAUSE THEY THINK IT IS
HEALTHIER THAN BEEF.
“SUSTAINABLE” IS THE THIRD
BIGGEST DRAW, BEHIND
TASTE.

38.6% OF ALL CONSUMERS
FEEL PLANT-BASED MEAT
ALTERNATIVES ARE A FAD
(COMPARED TO 19.6% OF
THOSE WHO EAT IT FEEL IT IS
A FAD).

THE PERCENTAGE OF
BEYOND MEAT CUSTOMERS
WHO EAT IT REGULARLY
DECLINED Q/Q
(OCCASIONALLY OR ONLY
ONCE INCREASED).

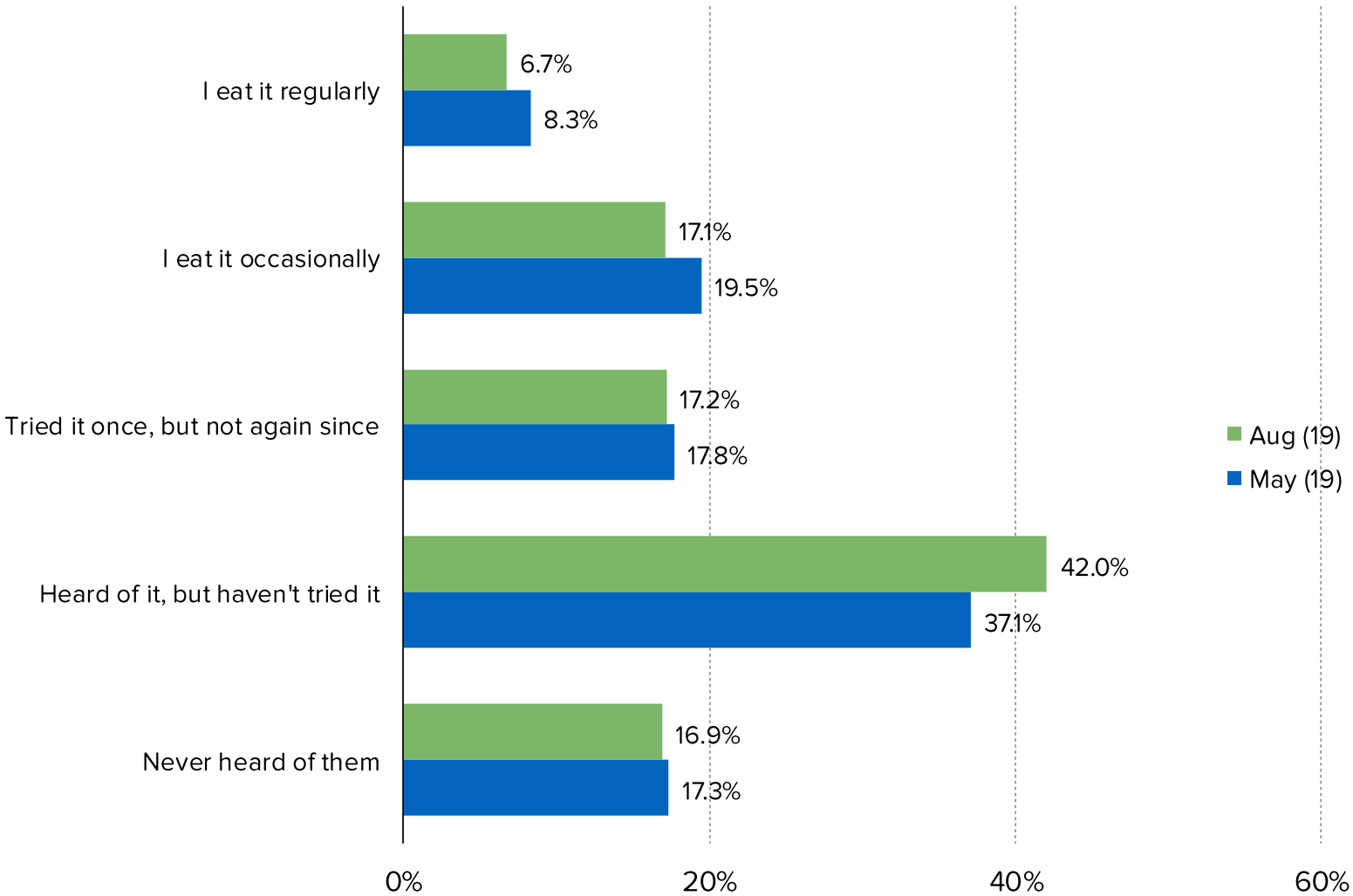
AMONG CUSTOMERS,
FEEDBACK AROUND
IMPOSSIBLE FOODS
SLIGHTLY IMPROVED AND
FEEDBACK AROUND BEYOND
MEAT SLIGHTLY WORSENER.

CONSUMERS OF PLANT-
BASED MEAT ALTERNATIVES
OVER-INDEX AS BEING
CUSTOMERS OF STARBUCKS,
CHIPOTLE, PANERA, AND
SHAKE SHACK.

PLANT BASED PROTEIN – MARKET SIZING

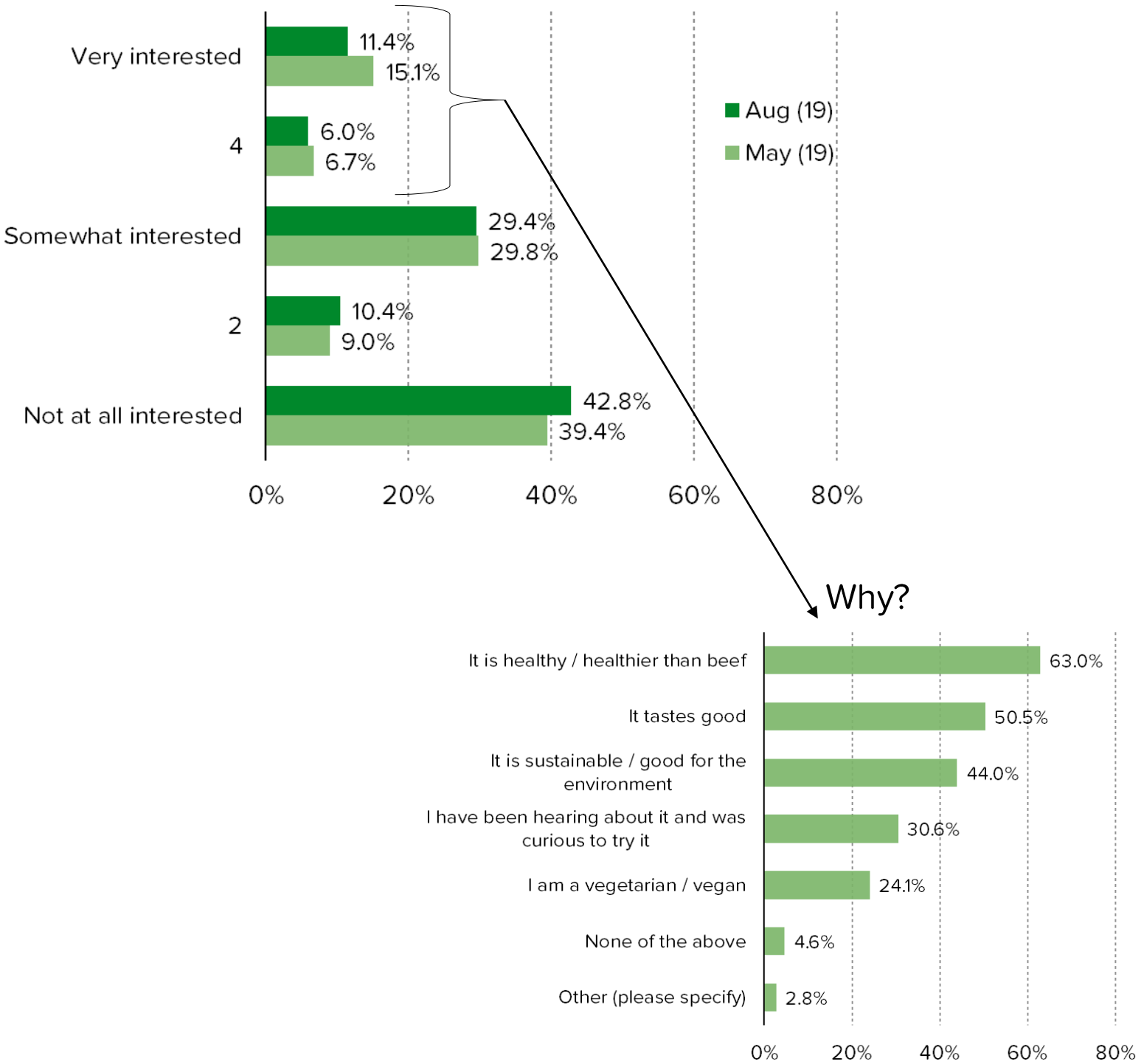
WHAT IS YOUR EXPERIENCE WITH PLANT BASED MEAT SUBSTITUTES (IE. BURGERS THAT ARE MADE WITH PLANT PROTEIN AND DON'T CONTAIN ANY BEEF).

Posed to all respondents



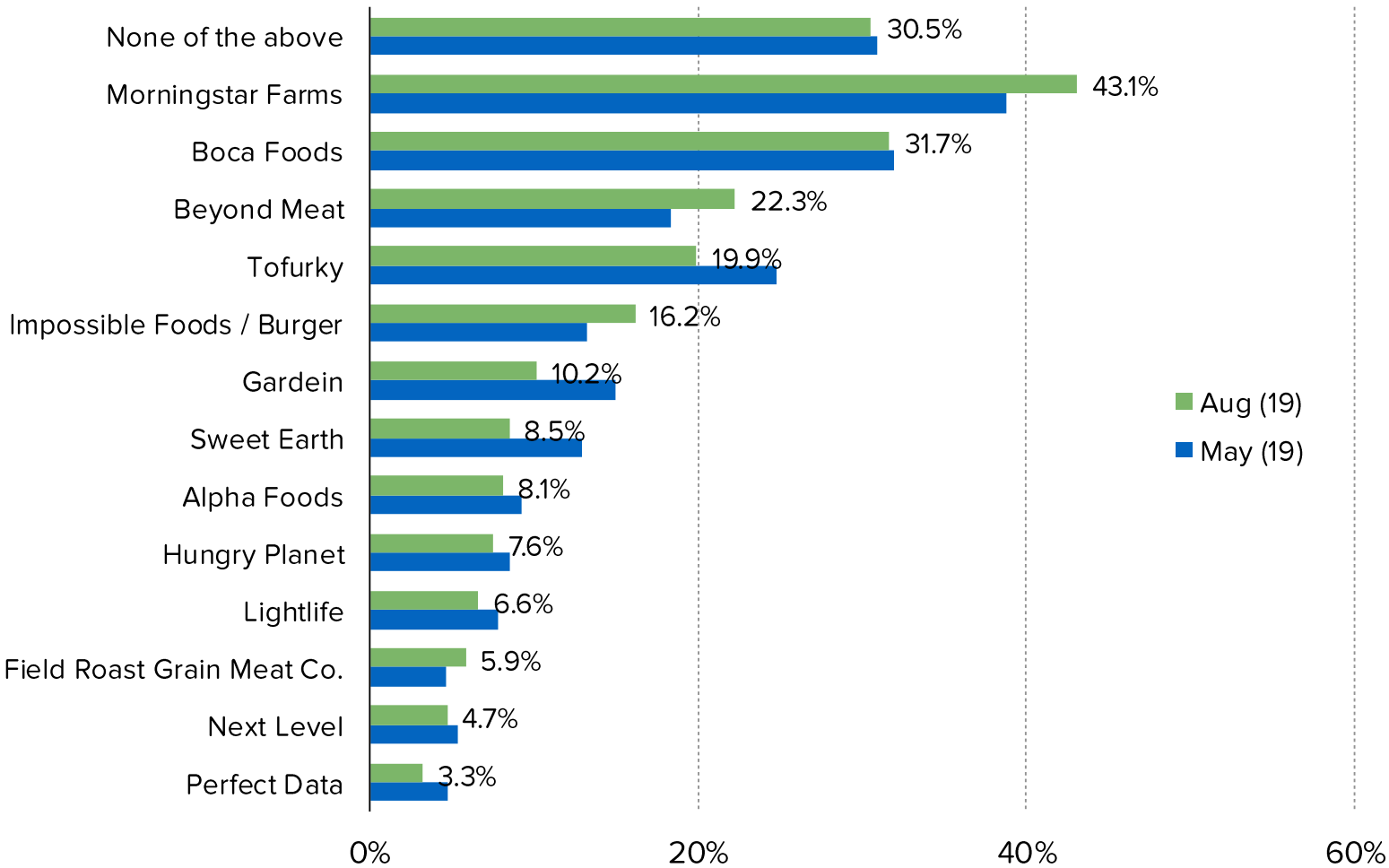
DO YOU HAVE ANY INTEREST IN INCLUDING PLANT BASED MEAT SUBSTITUTES IN YOUR DIET? (IE. BURGERS MADE WITH PLANT PROTEIN AND NO BEEF).

Posed to all respondents



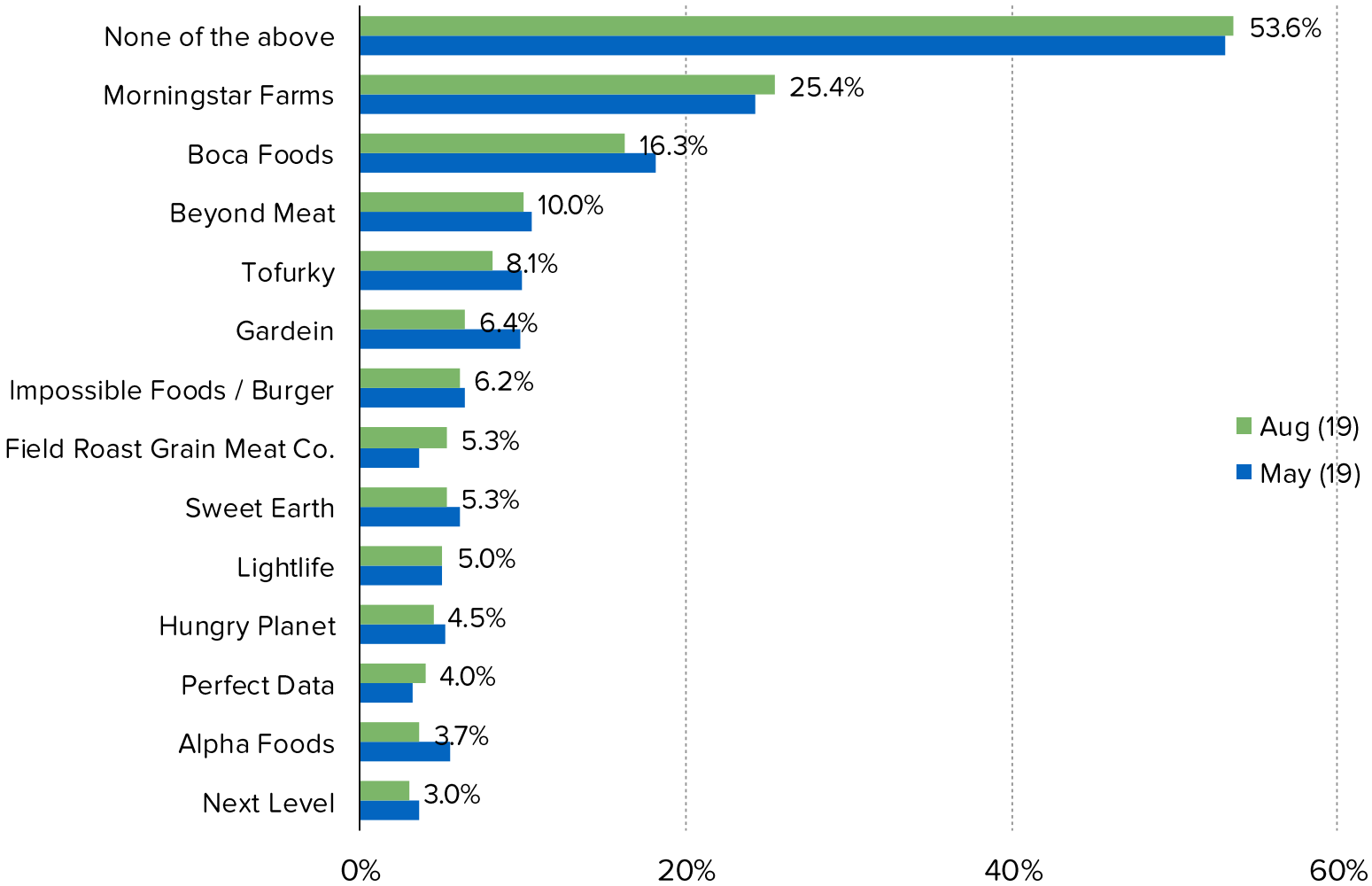
HAVE YOU HEARD OF ANY OF THE FOLLOWING BRANDS? (SELECT ALL THAT APPLY)

Posed to all respondents



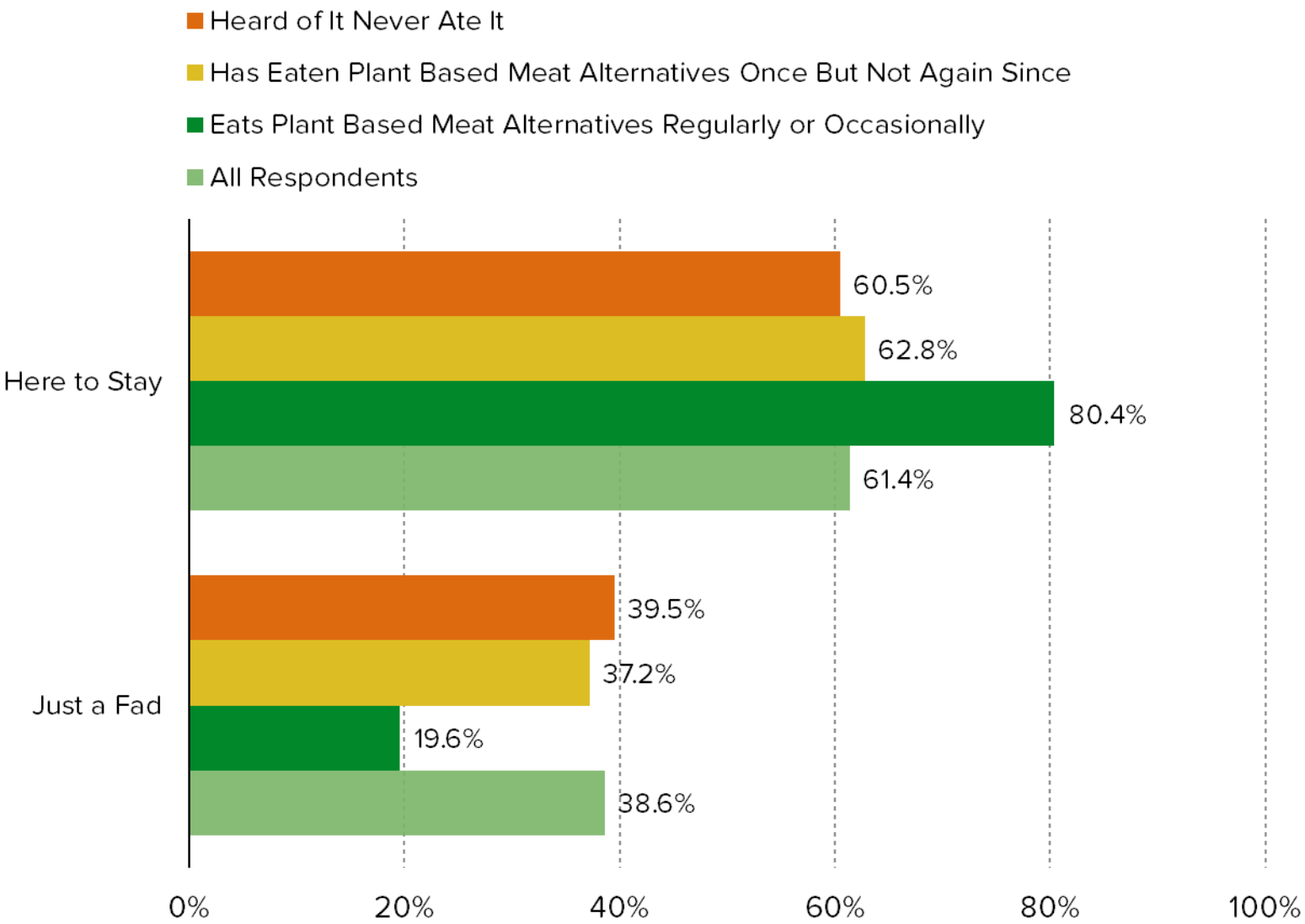
HAVE YOU TRIED FOOD FROM ANY OF THE FOLLOWING BRANDS? (SELECT ALL THAT APPLY)

Posed to all respondents



IN YOUR OPINION, ARE PLANT-BASED MEAT ALTERNATIVES...

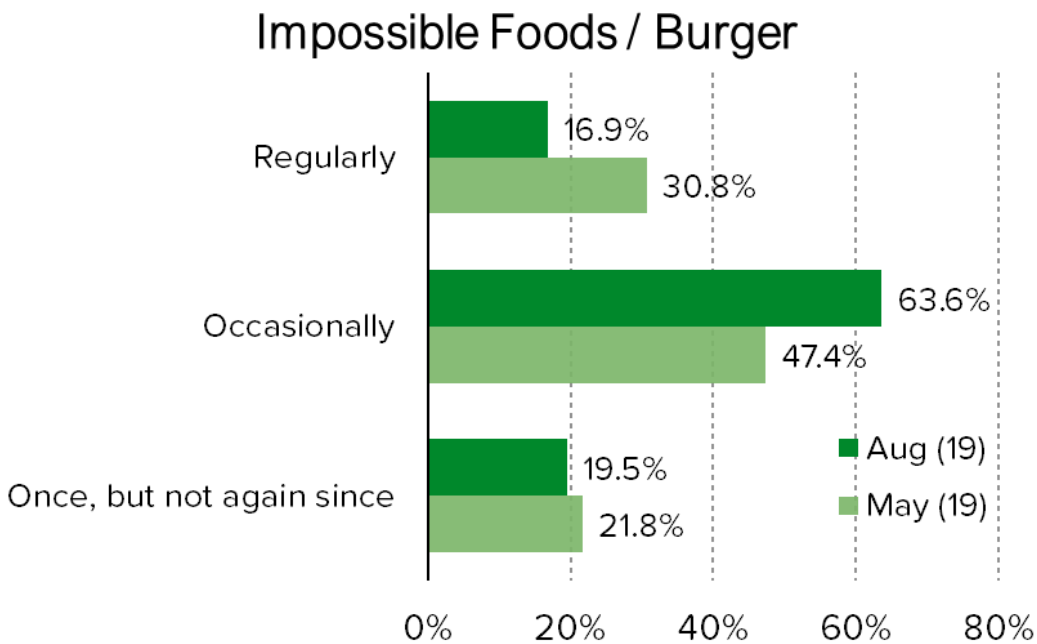
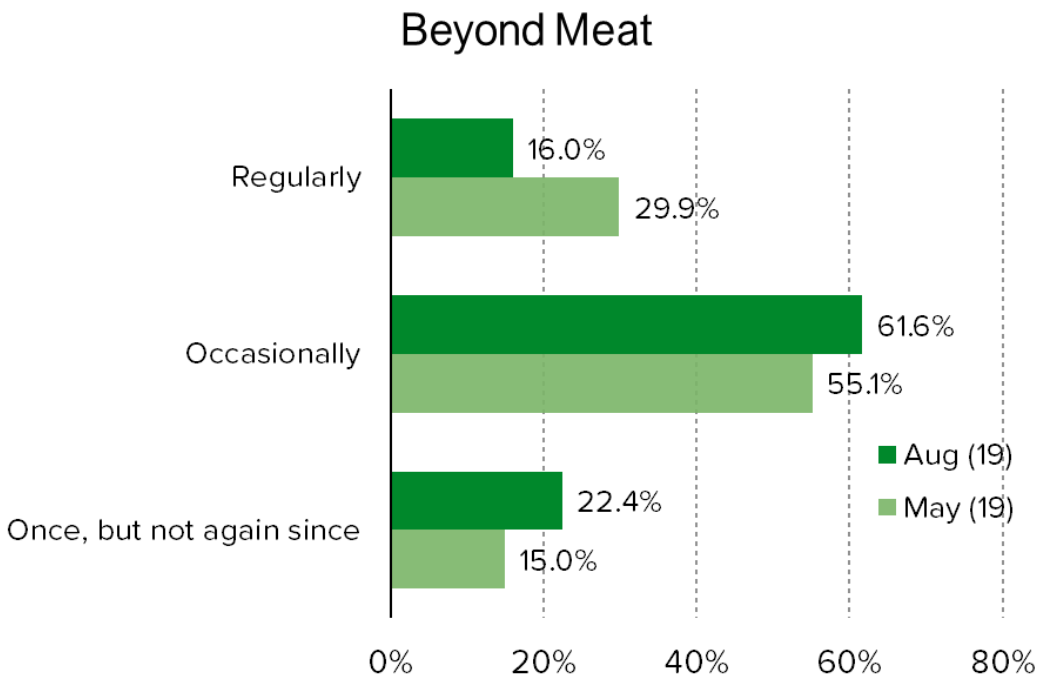
Posed to all respondents



PLANT BASED PROTEIN – RESPONDENTS WHO HAVE TRIED IT

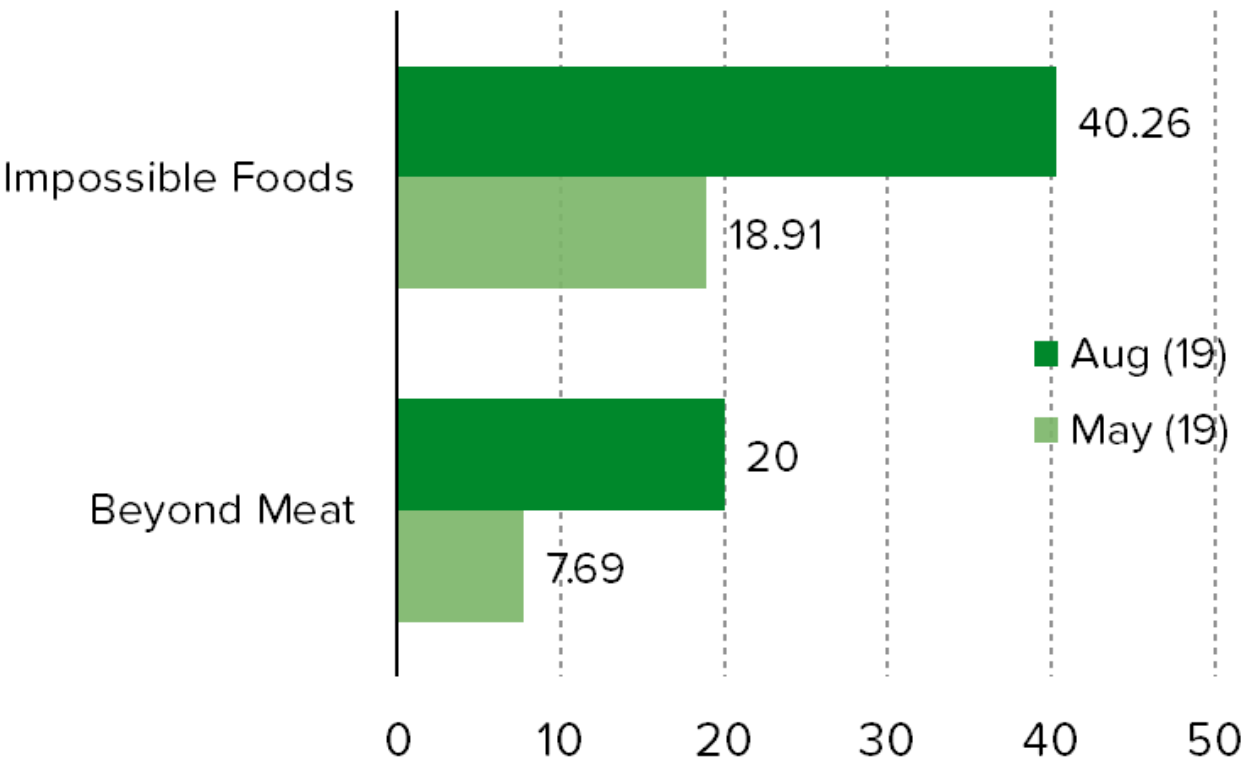
HOW OFTEN DO YOU EAT IT?

Posed to respondents who have tried food from each of the following.



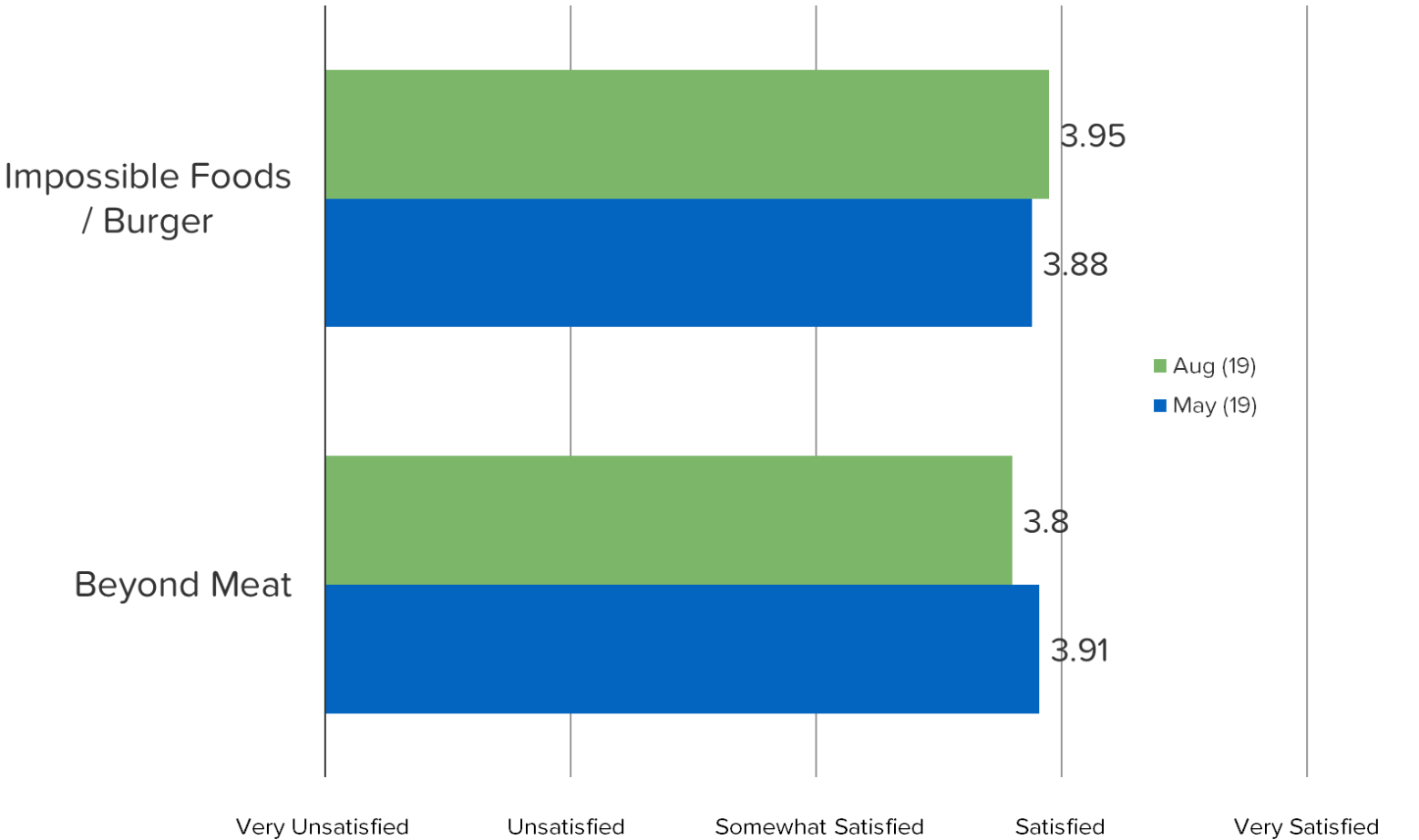
HOW LIKELY ARE YOU TO RECOMMEND THE FOLLOWING TO A FRIEND OR COLLEAGUE?

Posed to respondents who have tried food from each of the following.



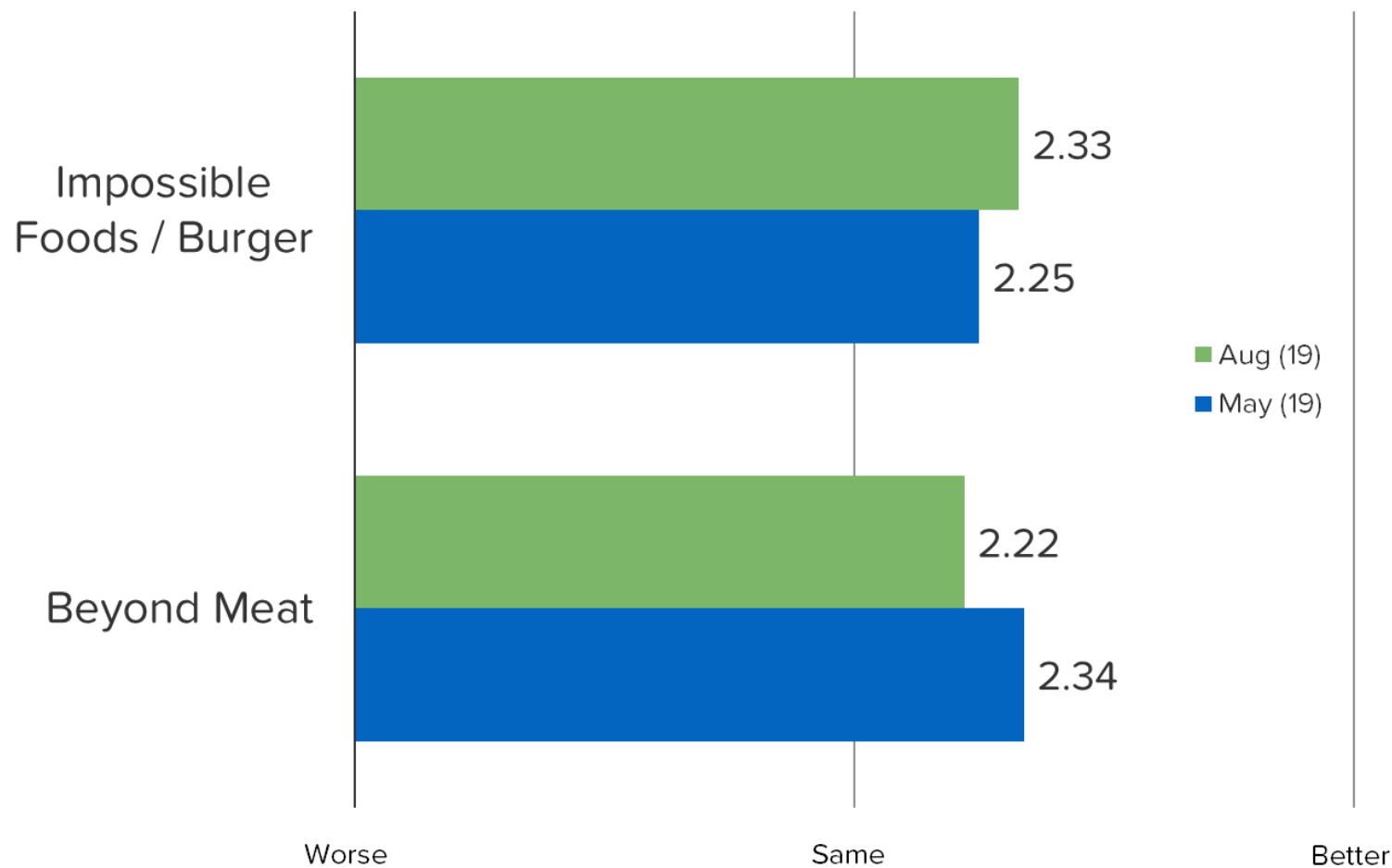
HOW SATISFIED WERE YOU WITH THE PRODUCT?

Posed to respondents who have tried food from each of the following.



IN YOUR OPINION, DOES IT TASTE BETTER OR WORSE THAN A BEEF BURGER?

Posed to respondents who have tried food from each of the following.



BEYOND MEAT | WHAT ABOUT THE PRODUCT MADE YOU INTERESTED TO TRY IT?

Posed to respondents who have tried food from each of the following.

AUG (19)

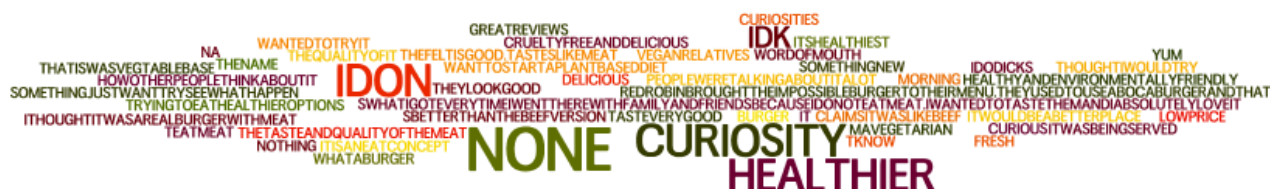


MAY (19)



Posed to respondents who have tried food from each of the following.

AUG (19)



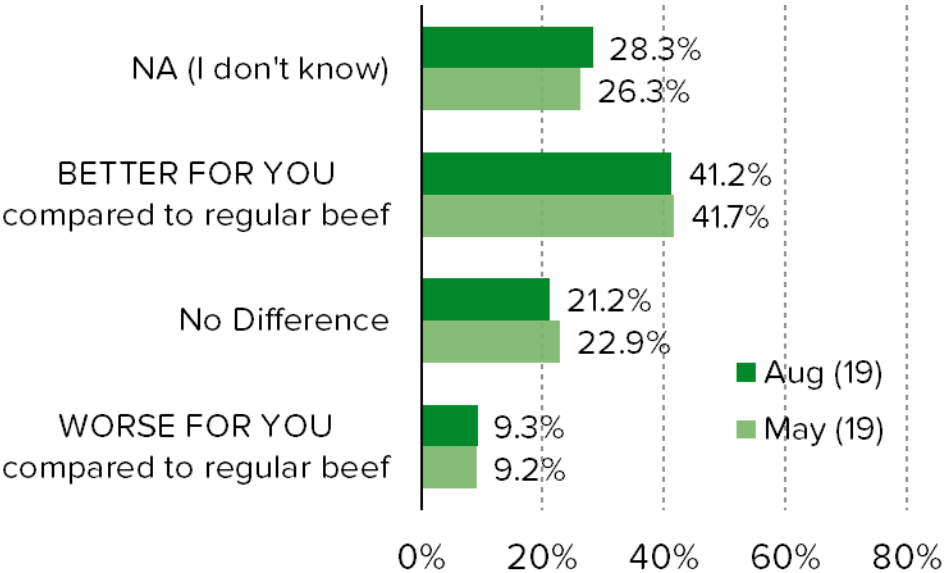
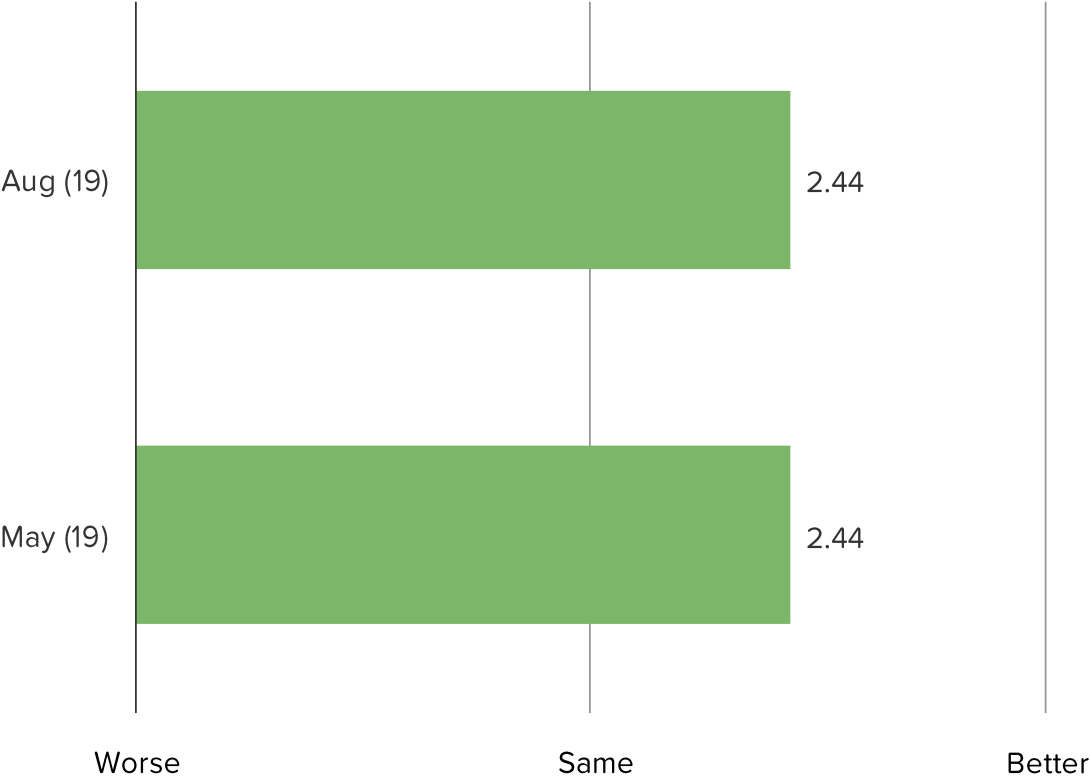
MAY (19)



PROJECTING BEHAVIOR

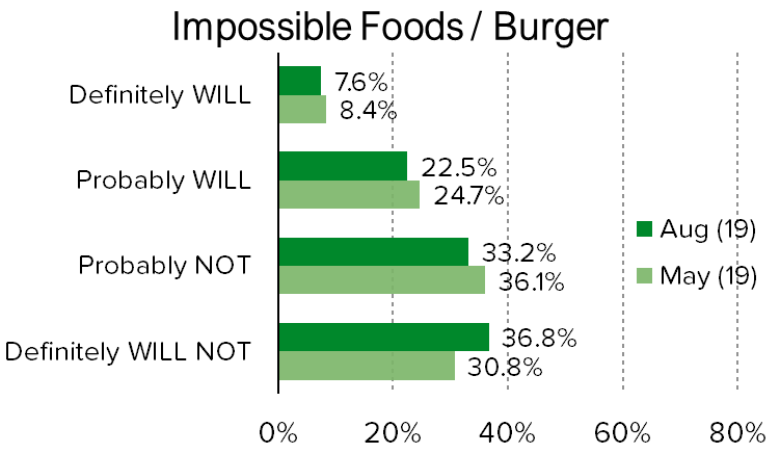
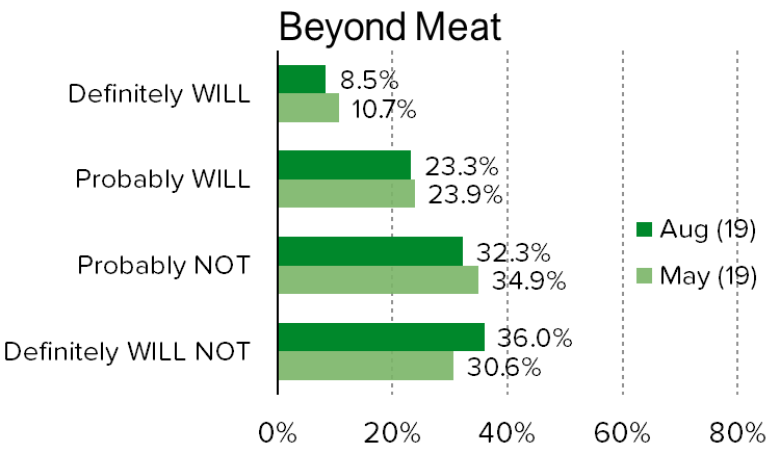
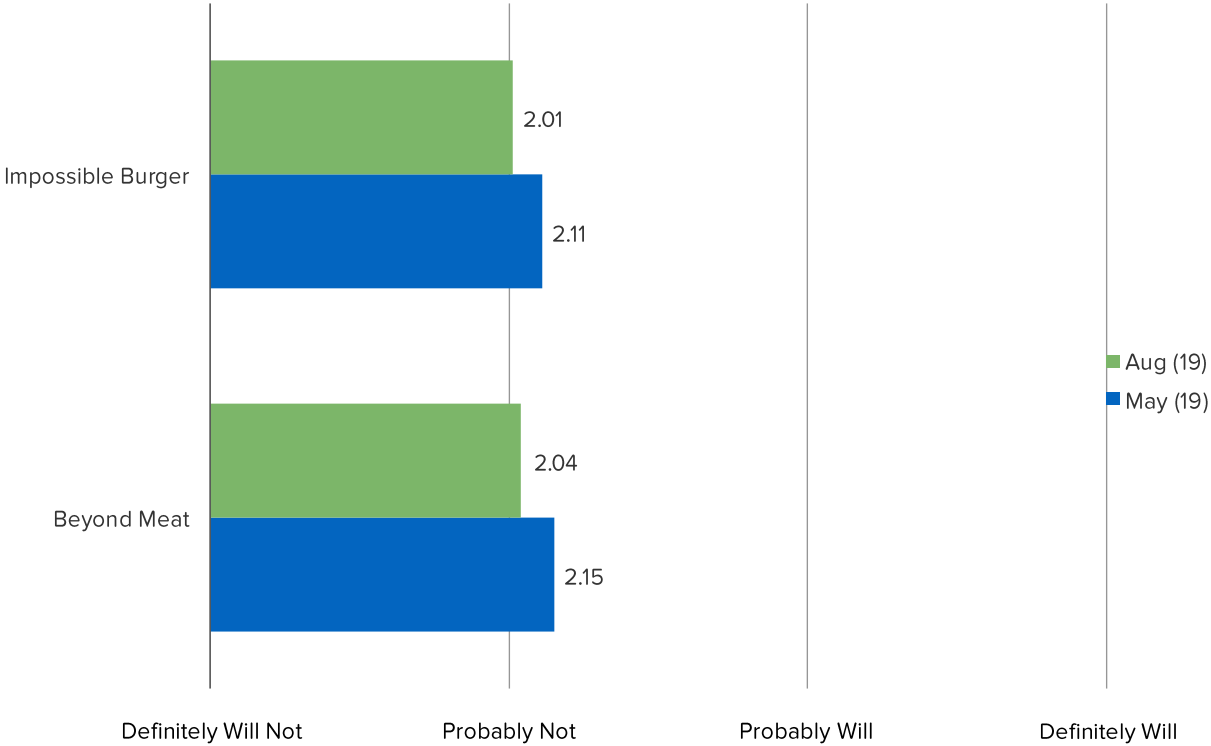
IN YOUR OPINION, ARE PLANT BASED MEAT ALTERNATIVES LIKE BEYOND MEAT AND IMPOSSIBLE BURGER MORE OR LESS HEALTHY FOR YOU COMPARED TO BEEF?

Posed to all respondents



HOW LIKELY ARE YOU TO EAT FOOD FROM THIS BRAND IN THE NEXT MONTH?

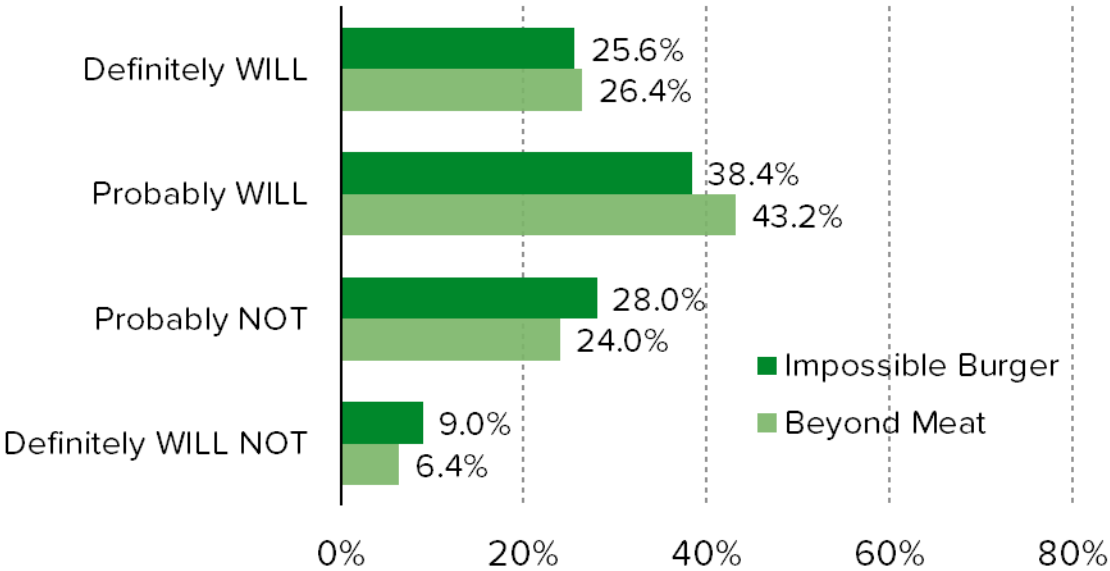
Posed to all respondents



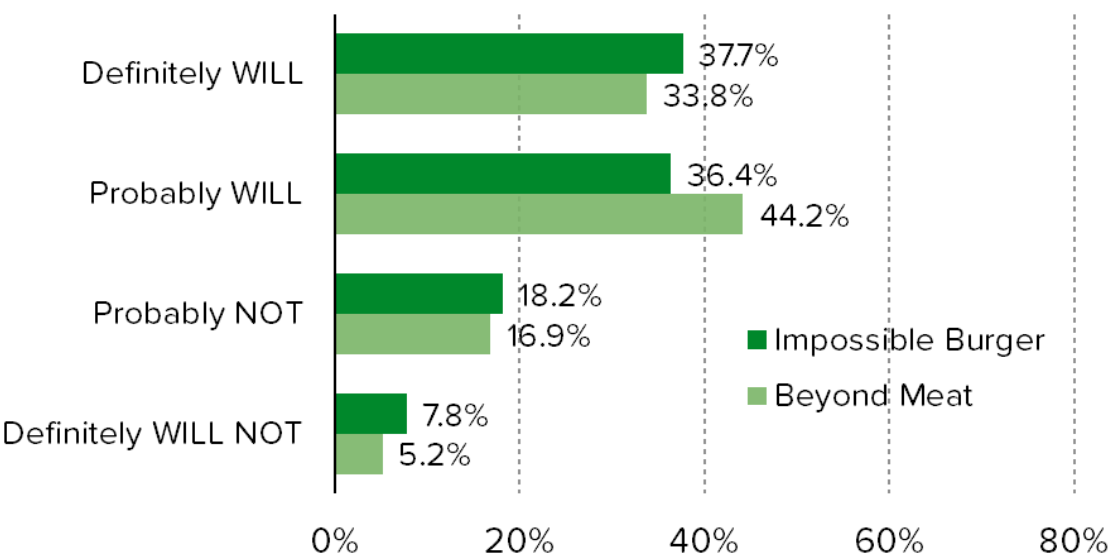
HOW LIKELY ARE YOU TO EAT FOOD FROM THIS BRAND IN THE NEXT MONTH?

CROSS TABS: Posed to people who have tried Beyond Meat, and posed to people who have had the Impossible Burger.

People who have tried Beyond Meat



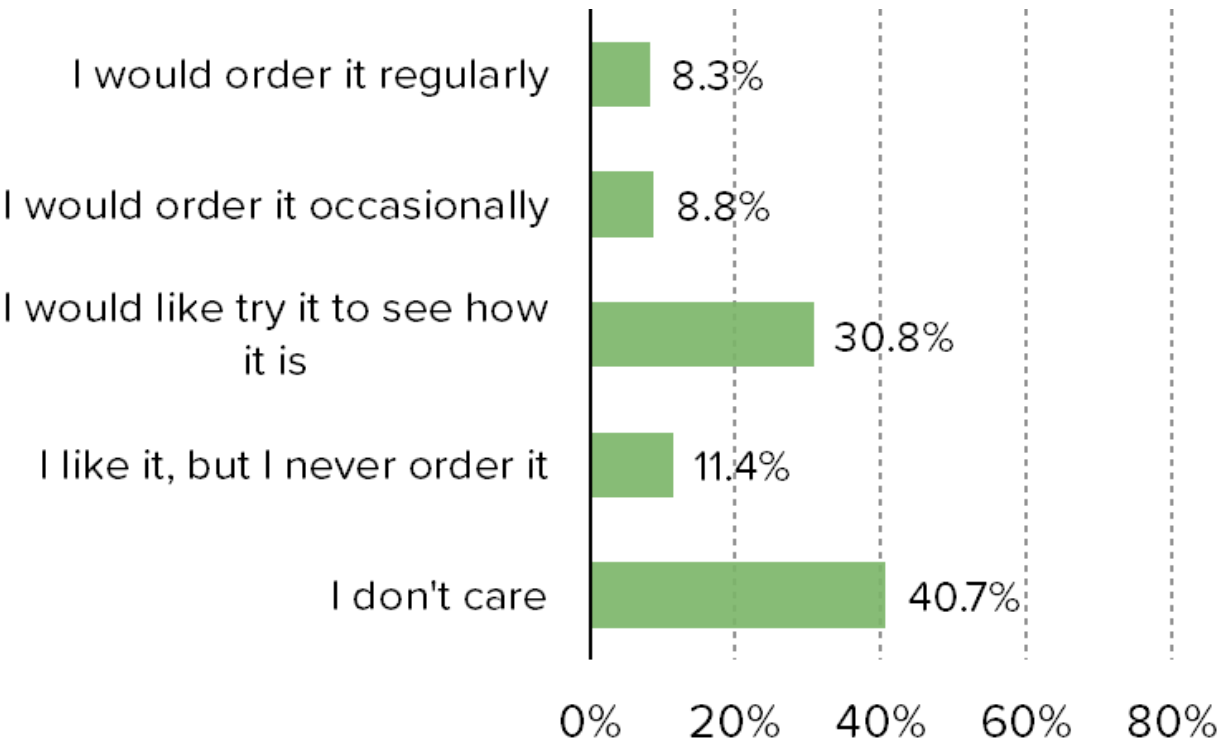
People who have tried Impossible Burger



RESTAURANTS

WHICH OF THE FOLLOWING WOULD BEST DESCRIBE YOUR RESPONSE IF A CASUAL DINING ESTABLISHMENT THAT YOU FREQUENT ADDS PLANT-BASED MEAT ALTERNATIVES LIKE BEYOND MEAT OR IMPOSSIBLE BURGERS TO THEIR MENU?

Posed to all respondents



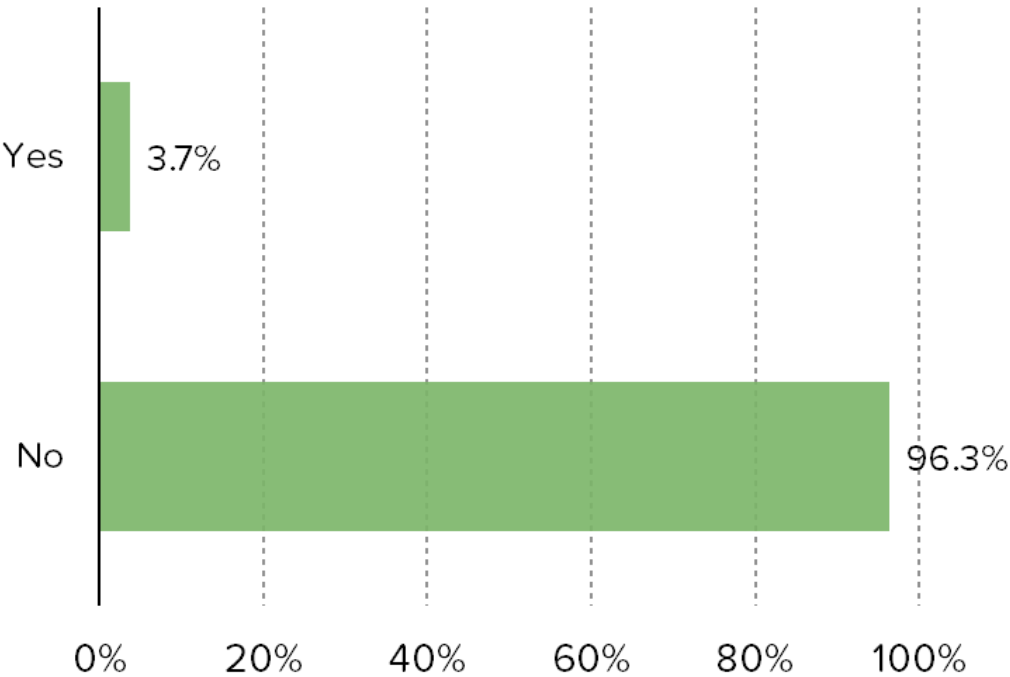
DO YOU REGULARLY OR OCCASIONALLY DINE IN OR ORDER OUT FROM THE FOLLOWING? (SELECT ALL THAT APPLY)

Posed to all respondents

Restaurants Visited Regularly Or Occasionally	All Respondents	Eats Plant Based Meat Alternatives Regularly or Occasionally	Spread
Starbucks	26.2%	34.8%	8.7%
Chipotle	18.1%	25.3%	7.2%
Panera	20.4%	26.7%	6.3%
Shake Shack	7.0%	11.5%	4.5%
Cheese Cake Factory	12.7%	16.9%	4.2%
Ruby Tuesday	11.6%	15.5%	4.0%
Buffalo Wild Wings	16.5%	19.9%	3.4%
Wingstop	8.7%	11.8%	3.1%
BJ's Restaurants	4.5%	7.1%	2.6%
Dominoe's	22.8%	25.3%	2.6%
Dunkin Donuts	23.7%	26.0%	2.4%
Maggiano's	4.1%	6.4%	2.3%
Eddie V's	1.9%	4.1%	2.2%
Chili's	18.8%	21.0%	2.1%
Zoe's	2.9%	4.7%	1.8%
IHOP	23.4%	25.0%	1.6%
Olive Garden	29.5%	31.1%	1.6%
Yard House	3.6%	5.1%	1.5%
Red Robbin	13.6%	14.9%	1.3%
Seasons 52	2.6%	3.7%	1.2%
Cheddar's Scratch Kitchen	5.8%	6.8%	1.0%
Papa John's	19.0%	19.9%	0.9%
Dave & Buster's	6.5%	7.4%	0.9%
Capital Grille	3.0%	2.7%	-0.3%
Sonic	22.8%	22.3%	-0.5%
Longhorn Steakhouse	15.0%	14.5%	-0.5%
Pizza Hut	31.1%	30.4%	-0.7%
None of the above	8.8%	7.8%	-1.0%
Appleby's	20.4%	19.3%	-1.2%
Cracker Barrel	20.8%	18.9%	-1.8%
Chick-fil-A	33.7%	31.4%	-2.3%
Burger King	42.3%	39.2%	-3.1%
KFC	34.4%	30.4%	-3.9%
Texas Roadhouse	17.9%	13.9%	-4.1%
Wendy's	39.5%	35.1%	-4.4%
Taco Bell	40.3%	34.8%	-5.5%
McDonald's	54.0%	47.3%	-6.7%

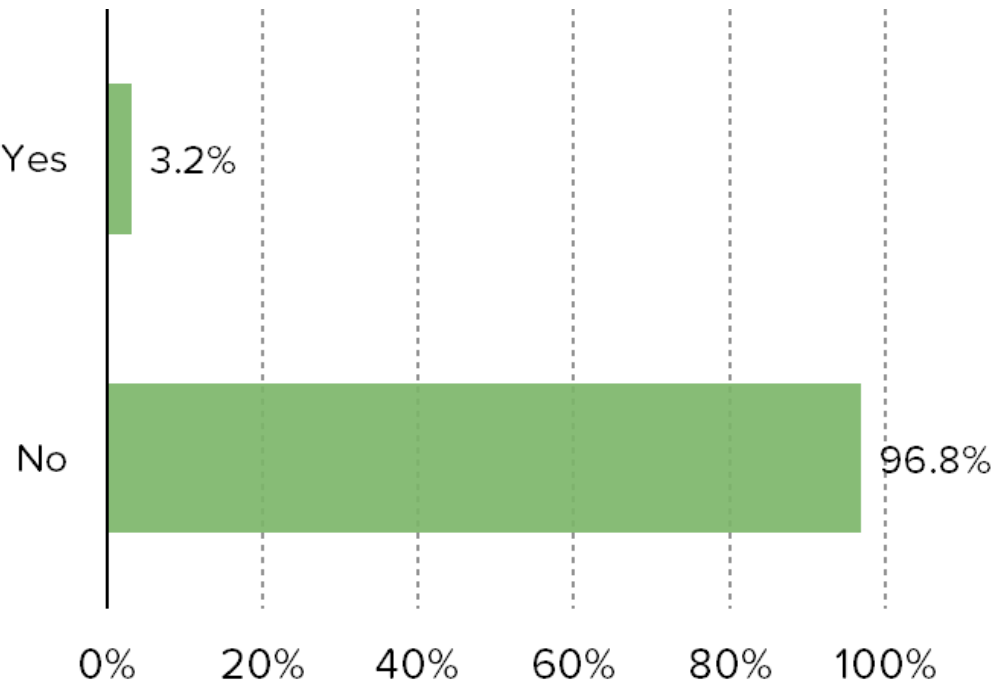
HAVE YOU EATEN BEYOND MEAT PRODUCTS FROM ANY CASUAL DINING RESTAURANTS?

Posed to all respondents



HAVE YOU EATEN IMPOSSIBLE FOODS PRODUCTS FROM ANY CASUAL DINING RESTAURANTS?

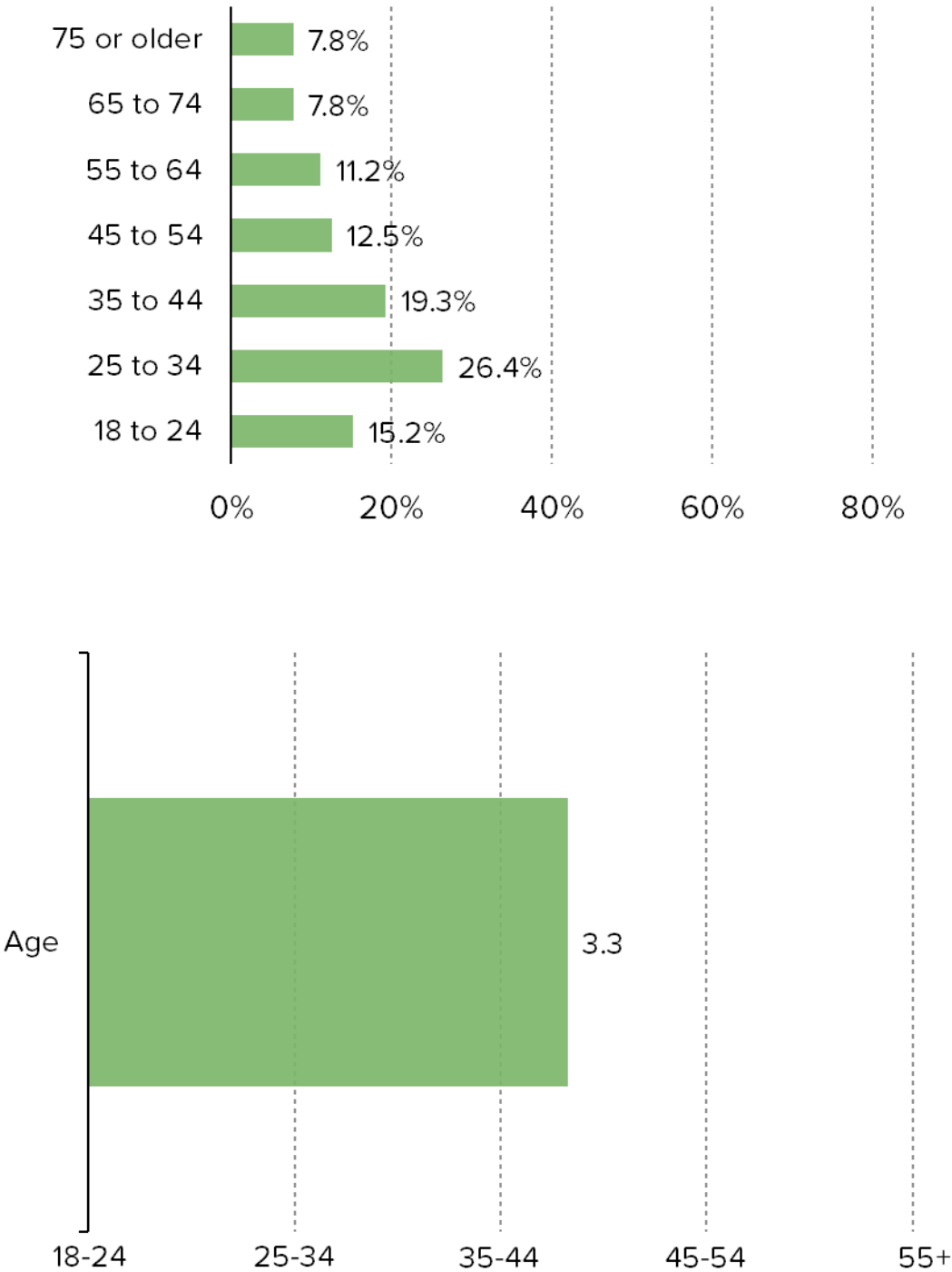
Posed to all respondents



DEMOGRAPHICS OF RESPONDENTS WHO EAT PLANT-BASED MEAT ALTERNATIVES REGULARLY OR OCCASIONALLY

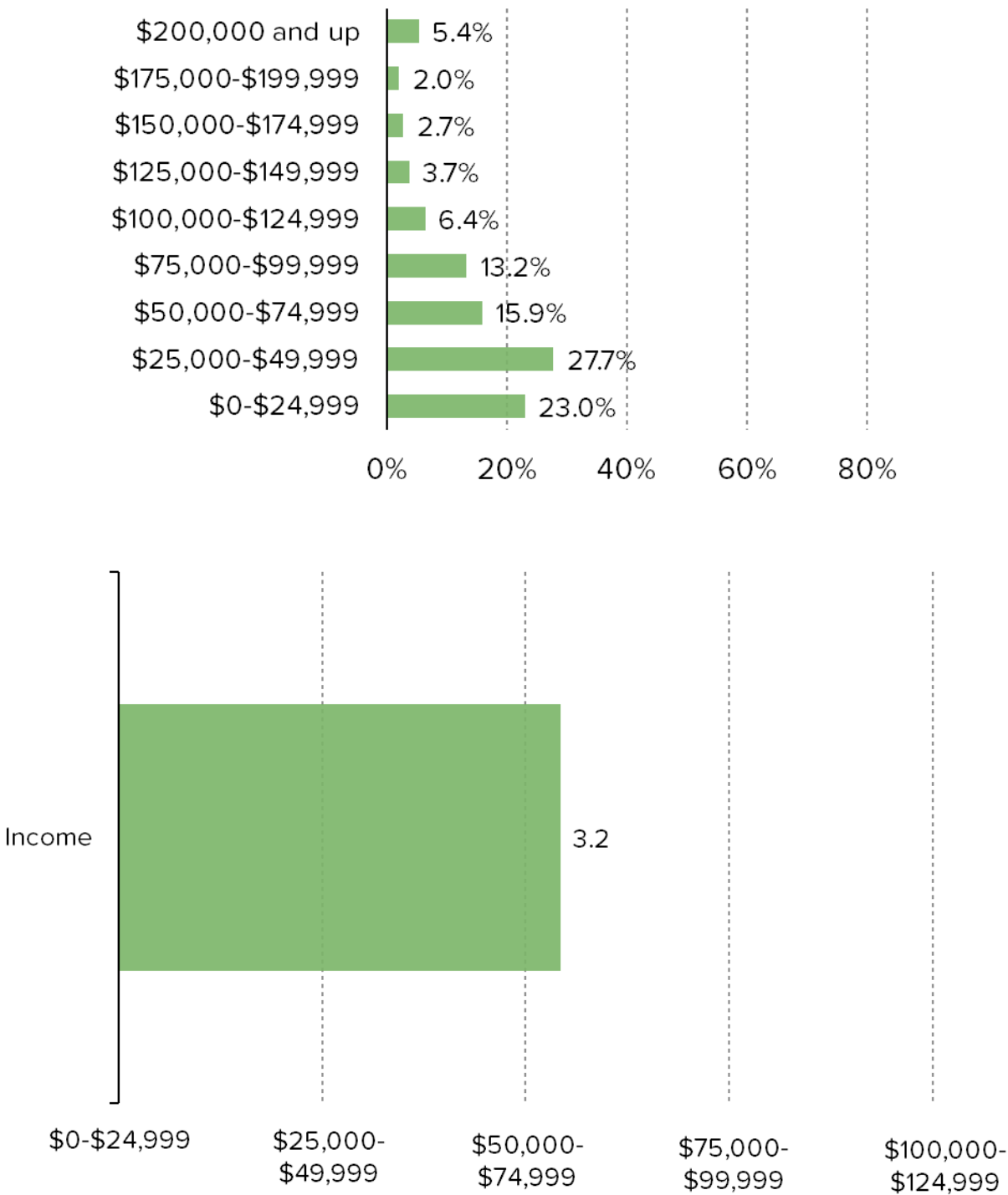
EATS PLANT BASED MEAT ALTERNATIVES REGULARLY OR OCCASIONALLY

Posed to all respondents



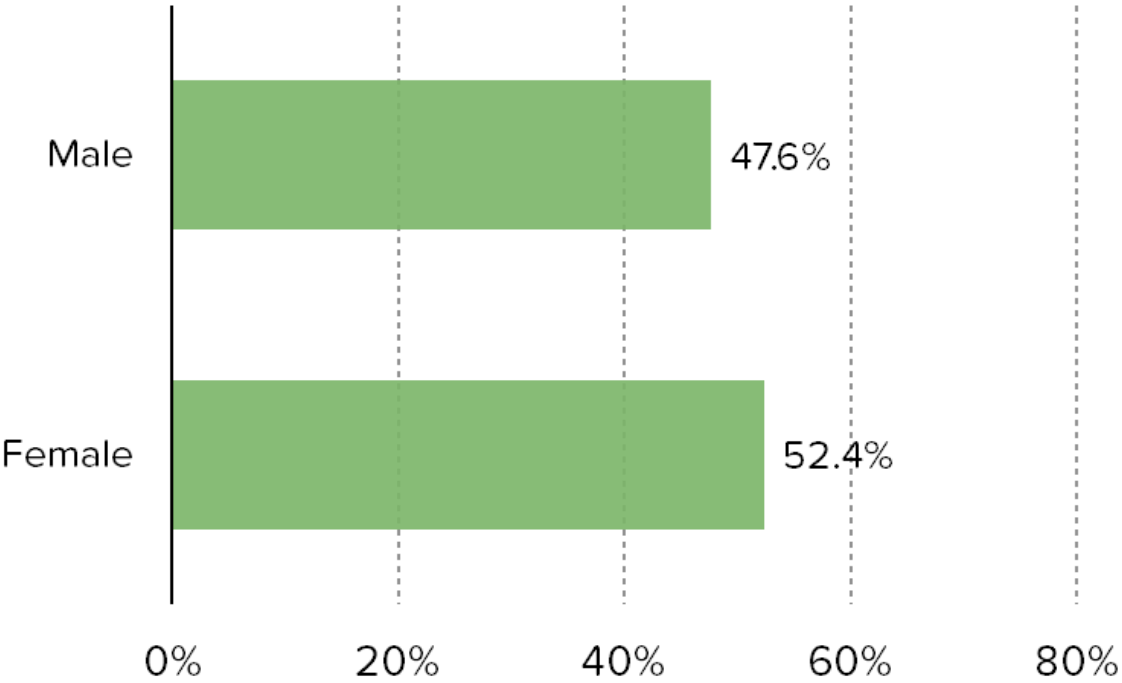
EATS PLANT BASED MEAT ALTERNATIVES REGULARLY OR OCCASIONALLY

Posed to all respondents



EATS PLANT BASED MEAT ALTERNATIVES REGULARLY OR OCCASIONALLY

Posed to all respondents



EATS PLANT BASED MEAT ALTERNATIVES REGULARLY OR OCCASIONALLY

Posed to all respondents

