

Who's eating plant-based food and how can you best market to them?

As more consumers reduce their meat and dairy intake and seek out plant-based alternatives, the onus is on marketers to adapt their strategies to reach them. This means creating content that resonates with various demographic groups by tapping into the motivations behind their food choices and distributing it on channels where they're most actively engaged.

The Media Precinct

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Background

The global plant-based food market is booming. Various research reports suggest it'll be valued at anywhere between \$93 billion USD and \$167 billion USD in the next decade.

According to the Good Food Institute and Plant Based Foods Association, based on retail sales data commissioned from SPINS, the plant-based retail food market alone in the US is currently worth a hefty \$8 billion. Meanwhile, research from Credit Suisse found that 66% of consumers aged 16-40 from 10 countries intend to increase their spending on plant-based meat and dairy alternatives.

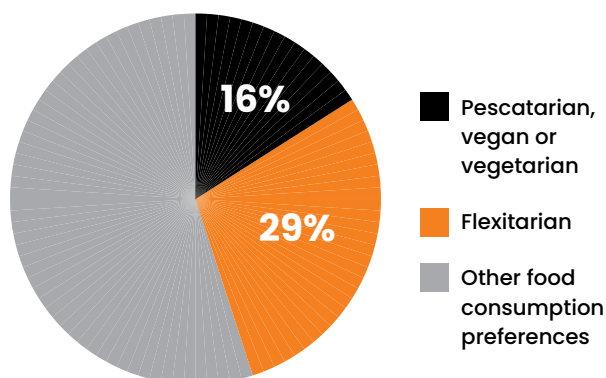
Australia is also riding this wave. Food Frontier, an independent think tank on alternative proteins, found in its 2020 State of the Industry report that more than 40 domestic businesses are now producing plant-based meat, cultivated meat or products of precision and biomass fermentation. In addition, our supermarkets and restaurants now boast a diverse range of more than 300 plant-based meat products.

Understanding consumer demographics

Who are these consumers eager to change their food habits?

Bespoke research by The Media Precinct revealed that 16% of Australians adhere to 'free-from' lifestyles (pescatarian, vegan or vegetarian), while 29% indicate that they are active meat and dairy reducers – also known as 'flexitarians' (see breakout box for terminology).

Australian food consumption habits



While the trend for plant-based eating is prevalent among all age groups, a Euromonitor report notes that

those aged 15-44 are the most frequent consumers of free-from foods and beverages.

Baby boomers, however, are leading the way when it comes to the meat reduction trend, according to research undertaken in 2019 by Food Frontier. "Boomers are actively reducing their meat intake, while vegetarians and vegans are most likely to be millennials," says executive director Dr Simon Eassom.

But the motivations for reducing meat and other animal products vary among different demographics.

Consumer motivations

What drives people to overhaul their eating habits?

According to the Euromonitor International Voice of the Industry: Food & Nutrition survey (March 2021), 37% of global consumers chose a plant-based diet for animal welfare reasons, 39% for environmental concerns, and 49% because of health.

Yet the motivations vary among different age groups. For instance, the primary motivator for the 15-29 age group is environmental concerns, while those aged 30-44 are driven by animal rights.

Similar trends are seen in Australia. A 2021 Toluna survey of 1,026 Australians found that declining meat consumption is primarily due to health concerns (65%), followed by high meat prices (40%) and environmental reasons (30%).

Eassom says Food Frontier's own research shows all generations cite health as the number one reason for reducing meat consumption. "This is closely followed by a four-way tie: the environment, animal welfare, cost, and increasing variety of plant-based options available."

What does this look like in numbers?

According to Roy Morgan Research in 2022, there are 4,130,000 potential grocery buyers in Australia who are actively reducing their meat and dairy intake to improve their health or are motivated by their flexitarian, vegan or vegetarian food status.

There are also an additional 4,443,000 'adventurous foodies' who are open to exploring new trends and trying new foods, including plant-based options.

Let's take a closer look at three key audience personas, identified by Roy Morgan, as most likely to increase their plant-based food consumption:

- **Initiated:** This group comprises around 640,000 people with an average age of 22. They're predominantly focused on

developing their identity and are driven by human rights, the environment, retaining Australian heritage and Aboriginal culture, and wanting the world to be a better place.

- **Conscious:**

In this group of around 1,177,000 people, the average age is 31. These socially aware, optimistic consumers hunt for trends, with around 34% living a plant-based lifestyle. They desire betterment in all aspects – world, employment, human rights, and food.

- **Wellbeing:**

The largest group of around 3,797,000 baby boomers and GenXers with an average age of 62 are reducing their meat and dairy intake for health reasons. They aim for success and a relaxed lifestyle while retaining their traditional values. This group is particularly mindful of lowering their red meat consumption and prefers minimally processed foods.

Crafting appealing content

Over a five-year period, Irina Gerry led several initiatives and product launches within multinational food company Danone's plant-based division in the US, including working on two of the most iconic plant-based brands, Silk and So Delicious.

She says that when it comes to appealing to the target consumer, there is no one-size-fits-all formula or approach that guarantees success. "We must always start with understanding our consumer," says Gerry, now Chief Marketing Officer at precision fermentation firm Change Foods. "That means understanding them at a more personal, human level. I've spent many days going into people's homes, opening their refrigerators, discussing their food routines, pain points, family dynamics, personal preferences and financial considerations. I found that the best campaigns and product launches were always rooted in insights we gathered in that process."

One such successful campaign for Silk was '[Progress is Perfection](#)', which was designed for the flexitarian consumer who doesn't feel that strict adherence to a diet such as vegan or vegetarian suits their needs, but is still mindful of their food choices. "The campaign was rooted in the insight that most people strive to make positive progress in their lives and want to celebrate the small steps they take on their food journey, rather than striving to achieve an unattainable standard of perfection," says Gerry.

Marketers need to provide ongoing content that piques consumers' interest and continues to fuel their 'lifestyle'

of choice, highlighting the value of a plant-based lifestyle. This means showcasing great food options with environmental outcomes and animal welfare, and positive outcomes from plant-based eating.

"You need to satiate people's search for easy, exotic, healthy, plant-based recipes which they could, or want to, cook for their families, friends or themselves," says The Media Precinct's managing director Glenda Wynyard. "You can do this by marrying trends and demand. This means marketers must 'inspire' their potential customer to overcome any preconception barriers."

Food Frontier's Simon Eassom emphasises promoting the health and nutritional aspects of plant-based products through content since health is a key driver for consumers. "Anecdotally we know some consumers perceive plant-based meats as highly processed and anything manufacturers can do to combat this perception and highlight the nutritional benefits on marketing materials would be helpful," he says.

He suggests that content highlighting the high protein, flavourful, and locally-made attributes of plant-based foods is likely to appeal to consumers. "Share content that promotes the natural ingredients in products and show the ingredients in their raw form," he says. "Images depicting ingredient origins would work well."

With sustainability a key driver to switch to plant-based diets, content highlighting the environmental benefits of animal-free food is also likely to appeal to all demographics.

Choosing the right distribution channels

The Roy Morgan research from 2022 found that people have the desire to be recognised for the food choices they make whenever they eat out or have made a meal at home they're proud of. This means they'll take a photo of what they're eating and share it on social media, so make sure you're creating content on those platforms to reach these consumers.

Mainstream TV and Facebook are still popular channels for baby boomers and some GenXers, while Instagram and TikTok are good places to reach younger generations, although TikTok is increasingly being used by audiences other than 10-19-year-olds who make up [25% of users](#).

Wynyard from The Media Precinct stresses the importance of factoring in why people use certain platforms before deciding on what content to create. "TikTok users, for instance, are likely to want to be entertained and uplifted, discover great content, and

participate in challenges and initiatives. Brands should strive to align their content with these usage mindsets," she says.

Challenging your assumptions

Assuming that consumers' motivations match those of a cause-driven brand can lead to marketing missteps. Wynyard cautions that marketers need to research the real reasons that influence consumers' decisions to reduce animal products from their diet.

"Research will tell you there are other factors that may be more significant than consumers' altruistic, cause-related ideals," she says. "It tends to be health and market trends that drive the holistic reason most people reduce meat. It's not necessarily because of the treatment of farmed animals, for example, or for religious reasons, which is a massive assumption often made around heavy meat eaters."

Getting a handle on the motivations for different demographics and psychographics is also key. For example, the advocacy group Animals Australia is currently running two campaigns. The [You Didn't Know](#) campaign is a confronting advert showing the shocking and unfathomable cruelty involved in pig farming, while the [Be Their Hero](#) campaign is much softer and heartwarming.

"You need both in order to make a significant impact as people react and respond differently," says Wynyard. "Without truly understanding an audience's motivations, you won't be able to reach the full potential of your marketing campaigns."

Decoding Dietary Preferences: Know Your Terms

Vegan

Doesn't consume any animal products whatsoever (in their diet and broader life).

Vegetarian

Doesn't eat any animal meat including fish, but does consume animal secretions such as dairy, eggs and honey.

Pescatarian

Doesn't eat red or white meat, but does consume fish (and typically dairy, eggs and other animal secretions)

Flexitarian (sometimes conflated with 'reducetarian')

Eats a primarily vegetarian diet, with occasional animal meat

Reducetarian (sometimes conflated with 'flexitarian')

Reduces their meat and dairy intake

**Note: 'Plant-based' was originally interchangeable with 'vegan', but its meaning has shifted to also denote a way of eating that may contain some animal products.*



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