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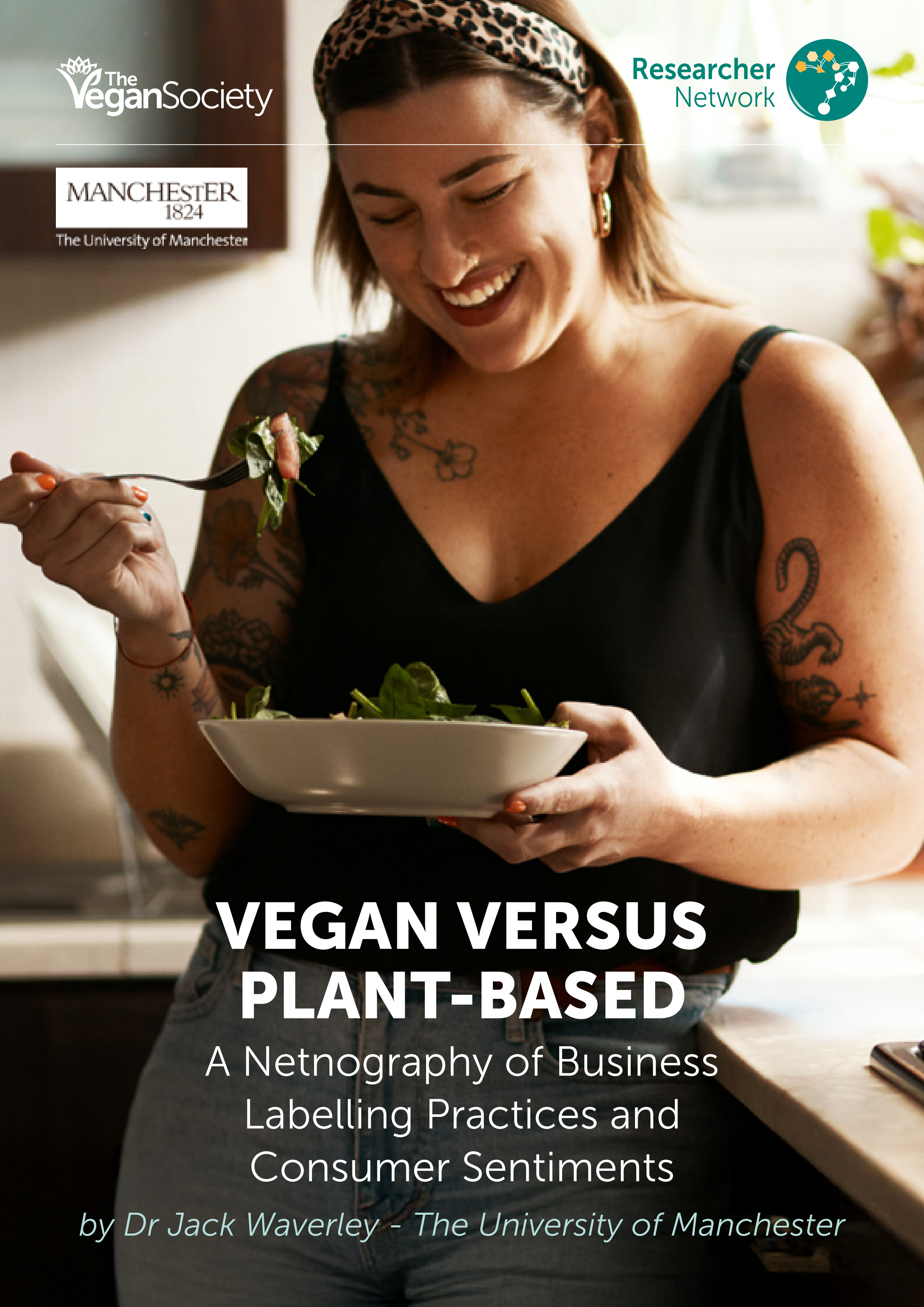

VEGAN VERSUS PLANT-BASED

A Netnography of Business Labelling Practices and Consumer Sentiments

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EXECUTIVE SUMMARY

Animal-free products are growing in popularity, but not all brands use the label 'vegan', adopting alternative terms like 'plant-based' instead. Previously, The Vegan Society used consumer surveys to try to understand how words like 'vegan' and 'plant-based' are being interpreted (see ***What's in a Name?***). Although some clear themes were established, the analysis suggested there was also much confusion and uncertainty amongst consumers. This project sought to build on that earlier study by (a) interviewing brand managers to understand *their* perceptions of these two terms and (b) using exploratory online research of social media posts to better situate our analysis within the broader consumer cultural landscape. We were guided by the following questions: Do brand managers have a preferred label; Do they use both; Or neither; Do they use their preferred label, or do they choose another; What informs their decisions; Do they have any areas of confusion, concern, or questions of their own? This report identifies three main approaches: vegan ***or*** plant-based; vegan ***and*** plant-based; ***neither*** vegan ***nor*** plant-based. Brand managers stress that all three approaches are based on intuition, anecdotal examples and access to the limited research on this topic. They assume that vegan is more polarising, but that plant-based is not without its problems, and so there is no risk-free approach. Online data reinforce this view and the need for more research in these rapidly changing, complex, and contested markets. Indeed, an important conclusion is that brands and consumers appear to be open to changing their mind if more evidence comes in – the question of vegan versus plant-based remains open. However, using the evidence available, this report ends with practical applications for brands, market researchers and vegan organisations.

INTRODUCTION

Veganism is becoming increasingly popular, and even more increasingly well known. Google Trends, for example, show that interest in veganism has increased eightfold from 2004 to 2024. At the same time, many celebrities and brands have begun to adopt the alternative term ‘plant-based’, though the same Google Trend chart shows that vegan-related searches remain, on average, eight to ten times more popular. The most recent data suggest that 10% of people in Great Britain now follow diets that reduce or eliminate animal products, with 1% following a vegan diet and 2% describing their diet as plant-based – in absolute terms, this equates to two million people (The Vegan Society 2024). Other surveys give similar, even slightly higher, estimations (Clark 2024; Wunsch 2024).

So, case closed? Not according to recent newspaper coverage. Many headlines claim that the 'vegan bubble' has 'burst' (Chiorando 2023; Dixon 2024; Steafel 2023) as vegan products or brands fail because “consumers are switching back to the real thing” (Robinson 2023). Yet, headlines are designed to grab attention, even to generate outrage, surprise, or disagreements that serve as clickbait, so it is important to critically consider these alongside other data (Valor *et al.* 2021). The surveys cited earlier note an increase in self-identifying vegans, but also consumers who express a desire to go ‘meatless’ without labelling themselves as vegans (Clark 2024; Wunsch 2024). Some research finds “people, in the same shopping basket, are putting in vegan cheese alongside mince or chicken breasts” (Wallon 2024), perhaps identifying as reducetarian, ethical omnivores, or simply avoiding labels all together (Percival 2022). For instance, one study finds 48% of UK consumers report reducing their meat consumption and 25% identify as flexitarian (Guadarrama *et al.* 2024).

A further complication is that although veganism is commonly defined as being entirely free from animal products, ‘plant-based’ has no clear or agreed-upon definition (at the time of writing). Thus, while many may use these two terms interchangeably, this may not accurately reflect the fact that plant-based products can, legally speaking, contain animal derivatives or exploit animals in the production process. Relatedly, it is also important to note that veganism and plant-based have different cultural connotations. Winters (2022: 6) observes how vegans are traditionally stereotyped as “extremists, with no sense of humour … arrogant, self-righteous, judgemental and militant.” So, even if legislative changes mean that plant-based labelling becomes regulated in ways that make it indistinguishable from vegan labels (i.e. entirely

Google Trends show that ***interest in veganism has increased eightfold from 2004 to 2024*** free from animal harm or exploitation), this does not necessarily mean that brand identities and consumer interpretations will merge into one. For instance, 'veganism' is generally associated with animal-free diets and pro-animal advocacy (Dickstein *et al.* 2022), whereas 'plant-based' tends to be more motivated by health (48%) and the environment (29%), rather than animals (25%) and their welfare or rights (Guadarrama *et al.* 2024).

To add to this complex picture, consumer culture is always on the move (Fischer and Giesler 2023; Giesler and Fischer 2017; Giesler and Thompson 2016), and vegan markets are no different. For instance, Yule (2024) observes that although "vegans used to be seen as humourless, sanctimonious and moralistic … a new generation has changed the diet's image, bringing a fun, vibrant, health-conscious slant to a vegan lifestyle that eschews some of the stricter elements, and appeals to young, climate-conscious consumers." Meanwhile, the marketplace is increasingly crowded by terms like plant-forward, meatless, and cruelty-free, each with their own connotations. The label plant-based – as a consumer identity, brand identification, and market identifier – may be complemented by these alternatives or find itself competing for attention and adherence.

Our research begins with these uncertainties, dynamics, and ongoing negotiations of meaning, all of which have significant material consequences for consumers, brands, and animals, not to mention public health, the environment, and societal inequities. Put simply, the differences between the label 'vegan' and the label 'plant-based' remains an area of confusion for consumers, brand managers, and others. A previous round of research sought to better understand what individual consumers think about these two terms (***What's in a Name?***), but this is was only part of the story. The present report sought to understand what brand managers thought about these two terms (and, crucially, what they thought that consumers thought), before using social media data to take a broader view of consumer culture and its influence on the vegan market.

This research touches upon many interrelated puzzles, issues, and trends, several of which were posed as questions in the Executive Summary. However, all these crystallise in the following research question: does the phrase 'plant-based' help or hinder the vegan movement (and Vegan Trademark)? The next section discusses the methodology that was used to try and answer these questions, then the section after details what we found, and the final section considers future research and practice. This report is written for a general audience – anyone interested in the evolving market of plant-based and vegan products – but focuses on providing useful insights for decision-makers in this area – entrepreneurs, brand managers, policy-makers, and so on. To this end, the report ends with some practical takeaways for those having to choose – plant-based or vegan?

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METHODOLOGY

Twenty formal interviews were conducted with company founders, marketing managers, brand consultants and others working within the vegan market. These ranged from small, high-tech start-ups still seeking funding, to well-established, global conglomerates launching vegan or plant-based products within a vast portfolio. Some brands provided meat alternatives based on vegetables or fungi, others were trying to create new materials that mimicked animal products down to the cellular level, and a few provided platforms or other services, rather than products of their own. These organised, audio-recorded interviews were supplemented by many more informal interviews, which took place during conferences, online meetings and other serendipitous interactions. These provided broad impressions, new ideas, or surprising insights that were used alongside the formal interviews as part of an ongoing, hybrid (online/offline) interpretive research process commonly described as 'netnography' (Kozinets 2019; Kozinets and Gretzel 2024).

As part of this netnography, social media posts, comments and reposts were also studied, providing an in-depth understanding of cultural themes and trends. Netnography is an alternative to big data content analyses, which seek to identify broad patterns rather than understand consumer decision-making from an insider's perspective (Gopaldas 2014; Kozinets 2019). Both approaches have strengths and weaknesses, but as The Vegan Society and other organisations are already undertaking surveys and other broad approaches, the focus of this research was to delve deeper into the complexities, ambiguities and nuances of the debate (vegan or plant-based?). In practical terms, this means that the research looked for patterns in how people wrote about or represented vegan and plant-based products, brands, or lifestyles. Patterns at a given point in time (themes) and over time (trends) were not simply interpreted in terms of quantity, as scale does not always equate to greater importance, significance, or relevance (Gopaldas 2014; Kozinets 2019). Rather, analysis followed Valor *et al.* (2021, 641), looking out for consistent patterns (similar uses, meanings

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A netnographic approach stresses how a human interpreter, immersed within a complex and changing consumer culture, can generate subtle, nuanced and emergent insights that machine learning currently cannot (Kozinets 2019; Kozinets and Gretzel 2024). As noted earlier, this is not to dismiss big data and other breadth-based research methods (e.g. surveys). Rather, the point of netnography is to provide a different kind of research, with different limitations and strengths, to critically complement the general and growing tendency towards AI-driven, dehumanised and decontextualised research (Gopaldas 2014; Thompson 2019).

More brands have expressed an interest in participating in this research. As detailed at the end of this report, there are also many opportunities for further data collection phases. However, it has become clear that the analysis has reached what has been described as 'theoretical saturation', the point at which interviews begin to become repetitive and each new interview begins to confirm what the researchers have already learnt (Glaser and Strauss 1967). This saturation was a signal for the research to pause, as enough knowledge had been created to answer the research question. Yet, a recurring theme throughout this report is that the label 'vegan' and the label 'plant-based' are continuing to evolve, both in relation to each other, but also within wider consumer cultural shifts that are redefining humanity's relationships with non-human animals (Grant *et al.* 2024; Waverley 2023). Thus, the current report represents a snapshot that hopes to inspire further research in this area – academic, practitioner-led and more.

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Photo taken at Farm Animal Rescue Sanctuary.

FINDINGS

Looking across the data, it was clear that the brands were very interested in our research question - does the phrase 'plant-based' help or hinder the vegan movement (and Vegan Trademark)?' During the research process this general interest also manifested in other, closely related, questions. What do the terms 'vegan' and 'plant-based' mean to consumers now? What might they mean in the future? How are they related to other terms, such as cruelty-free, plant-forward, or vegan-friendly? What should brands and other stakeholders do about all of this? This report focuses on our main research question, but in doing so inevitably provides some suggestions that also impact on these other areas of interest. As discussed at the end of this report, there remain many opportunities for further research, but also some concrete suggestions for what brands can begin doing in the immediate term.

Brands reported a lack of research addressing these questions specifically, with most studies inconclusive, only indirectly addressing these issues (e.g. as part of a broader survey on diet or lifestyle), or being too expensive for some brands to frequently or readily access. Instead, many brands described how they made decisions by combining these fragmentary insights with anecdotes from mass media (e.g., the kinds of newspaper headlines quoted in the introduction), social media (e.g., the themes discussed later) and their own everyday experience. From this, three main approaches emerged:

1 **Most brands assume, or worry, that the word vegan can be off-putting. Thus, they ask themselves whether they should use this label *or* plant-based**

2 **Some brands argue that both terms can be used in combination, with vegan *and* plant-based working well when used carefully together**

3 **Some brands argue that plant-based is also a problematic or potentially problematic term, and therefore look for alternative labels or ways to avoid using labels at all – *neither* vegan *nor* plant-based**

All of these approaches had perceived advantages and limitations for brands. Furthermore, the participants in this study stressed that these approaches were based on incomplete information supplemented by assumptions, impressions and gut feeling or intuition. There was a strong expressed desire for more research in this area to support, refute, or modulate these approaches – in short, to provide firmer, evidence-based answers regarding consumer preferences that can inform commercial decisions. As noted later, The Vegan Society and its Vegan Trademark are considered by some to be a highly reputable, well-known and trusted organisation in this market (the gold standard, as participant 12 put it). Brands would benefit greatly from further consumer and market research that provides evidence about how consumers interpret different terms, what they value, and why. In particular, brands sought more evidence that The Vegan Society's Vegan Trademark would lead to greater sales, awareness, or other commercial benefits, given that other marks (including each brand's own) could also be used. Similarly, although The Vegan Society may be a trusted source, it may be beneficial to commission independent organisations to conduct this research to minimise claims of bias when reporting evidence that supports the Society's own Vegan Trademark.

The social media data largely affirmed the brand managers' impressions– for instance, that veganism was seen as off-putting – but this should be analysed carefully. What the netnography shows is how and why brands have come to make the assumptions or form the intuitions that they have – because consumer culture is currently awash with polarising claims and counterclaims regarding veganism, for instance. However, the netnography did not seek to speak to the accuracy of those assumptions or intuitions, for everyday consumers may not believe headlines or engage with clickbait content. What this report shows, then, is why brands approach the question of 'vegan' and 'plant-based' in certain ways, and how these approaches are based on prevailing cultural patterns that may be driven by social, political and economic agendas that may, but do not necessarily, reflect consumer choice.

At this stage it is also worth stressing that many of these brands were not simply or even primarily motivated by profit, but also wanted to be culturally successful in terms of shifting public attitudes and mainstream behaviours away from animal-intensive consumption. For these brands, commercial success and cultural success were generally intertwined, as selling more animal-free products presumably meant that individuals and collectives were consuming less animals. However, there were also questions around whether using terms like 'vegan' had an additional

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impact in raising animal-related questions and concerns to the foreground. In contrast, while a plant-based label may be equally or more successful in commercial terms, this might come at the expense of cultural success (e.g. wider societal change beyond food choices).

These themes are explored later, but are highlighted here because they draw our attention to the fact that 'accuracy' is not the only significant criterion we should consider. Whether brands and social media discourses accurately reflect consumer choices is an important consideration, but consumer preferences, beliefs and decision-making processes are rarely, if ever, static (Giesler and Thompson 2016). It is therefore important to consider whether and how brands and labels can also play a part in changing consumer cultures, market systems and society more widely. Put simply, our netnography explains how and why brands make labelling choices, but it should not stop there – we need to also explore whether labelling choices should reflect consumer thinking as it currently is, or work to empower consumer choices in a positive direction.

The remainder of this report is structured around the three themes, following their logical flow through a series of perceptions (assumptions, impressions, gut feelings, e.g.) to the common conclusion that more research is needed.

VEGAN *OR* PLANT-BASED?

As noted earlier, the brands interviewed varied in terms of whether they were small start-ups or sub-brands within conglomerates. The interviewees varied from founders to marketing managers employed by established organisations. This meant that there was considerable variation in terms of motivation. Some brands were set up by vegans who were motivated primarily by animal welfare; these tended to gravitate initially towards the term 'vegan'. Others were created by flexitarians or vegans motivated by the environment, health, or other reasons, for whom 'plant-based' was a more obvious choice. Others were owned and managed by non-vegans who saw animal alternatives as a market growing in size and profitability with environmental and other benefits as well – here the main concern was pragmatic - what makes sense to consumers and what sells.

This variation was important because it affected how interviewees and the brands that they represented related to the word vegan. At the risk of oversimplification, participants could be arranged along a spectrum from those who more closely identified themselves and/or their brands with veganism and those who did not. However, this is not to suggest that all vegan owners chose the vegan label for their products, nor that non-

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Photo taken at Pigs in the Wood Sanctuary.

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vegans automatically rejected 'vegan' in favour of 'plant-based'. The data suggested a more complex picture, with brands adopting different positions along the spectrum, sometimes making a distinction between their preferred label and the one that they thought would be most commercially or culturally successful, and often describing shifts in thought and practice over time.

A recurring theme was, despite the variation in personal identification, almost all participants shared a concern that veganism was, or at least could be, perceived negatively. Interviewees identified certain public figures and media outlets as those promoting a negative view of vegans as loud, countercultural types who 'push' their unreasonable views onto others in 'annoying' ways. As participant 12 noted, these representations were important because they changed public perceptions, even if it is a 'subconscious' influence.

Participants also spoke about how veganism was seen as a practical issue in day-to-day life. As participant 17 put it, when people know a vegan they ask about "my dinner party – what should I make them?" Many brands saw themselves as solving practical issues, creating products that make veganism easier for vegans *and* the non-vegans who had vegan friends, family members, or employees. As discussed later, only a couple of the brands wanted to try and tackle cultural stereotypes head on through their marketing activities. Most wanted to focus on making veganism easier at a subtler, practical level.

Participants who came from the Global Majority and were operating (or planning to operate) in these markets also highlighted how the term 'vegan' is associated with the Global Minority (especially geographical markets like the UK, USA and Europe). Participant 18, for instance, noted how in countries like India the notion of not harming animals is better captured by the term *ahimsa* ("do no harm", see Casamitjana 2020). There, veganism was something that was not widely known about (although increasingly so through global media). This adds an important intercultural or even post-colonial consideration, potentially limiting most of the present analysis.

This is where plant-based labelling could come in. In contrast to 'vegan', the term 'plant-based' was seen as relatively neutral. Although a couple of participants noted that, over time, this term might also become stigmatised, for now it was largely seen as a neutral description of products, diets, or lifestyles. As such, a product could "happen to be vegan" (e.g. participant 12), without necessarily associating itself with veganism as an identity or ethical belief system. Plant-based labels could be useful for those who, for whatever reason, wanted to avoid animal products, but did not necessarily identify as vegan personally. Some brand participants felt that the terms plant-based and vegan were synonymous when used to describe products, with vegan being more associated with people, principles and politics. Put simply, labelling products as plant-based was a way of avoiding putting non-vegans off by avoiding potential associations with 'loud', 'demanding', 'problematic' vegans (participant 17).

However, plant-based was not entirely neutral. The label plant-based was often associated with health and the environment, without emphasising animals and societal change more generally (like the label 'vegan' might). Yet, brand participants and the sentiment analysis highlighted many critiques of plant-based products, claiming that many were not as healthy or environmentally friendly as might be assumed. In this sense, plant-based brands could be accused of greenwashing or carewashing (Chatzidakis and Littler 2022). During the sentiment analysis it also became clear that those who identified as vegan were keen to ensure that environmental and health-based arguments did not overshadow other issues, from human equity in the supply chain to reducing animal suffering. I'd like to note here that vegan and plant-based labelling does not indicate health or environmental benefits unless substantiated.

Brands, celebrities and activists could describe themselves as plant-based whilst raising issues relating to the treatment of animals and the need for system-level changes. However, usually those expressing such views adopted the term vegan in marketing materials, social media content, hashtags and metadata. A variety of social theorists have shown that political views are often hidden in plain sight, as individuals and groups do not always associate themselves or otherwise with specific ideologies, but rather demonstrate their worldviews through patterns in how they speak, how they act and what they do not say and do (Schmitt *et al.* 2022). Plant-based brands may not explicitly distance themselves from vegans, and vegan activists may not explicitly criticise the term plant-based, but ongoing data collection suggested that there are subtle dividing lines between the two (for more on this, see our earlier report, ***What's in a Name?***).

With these sentiments in mind, some of the brand data can be viewed rather differently. For instance, participant 16 described plant-based labels as "boring", lacking in emotional connection and thus potentially the surprise, delight and other emotions that drive repeat purchases. Yet, this

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apathy also suggests that plant-based labels can also lack in meaning that might be associated with a more identity-based, politically resonant, ethically driven term like 'vegan'. This analysis suggests that the debate around veganism and plant-based labelling may need to be carefully reinterpreted. At face value, plant-based was seen as a neutral or 'safe' descriptor for products, with faintly positive connotations like health and environmentalism. Such associations with health and environmentalism were largely inferred by consumers and are not inherently substantiated by the label itself.

In contrast, vegan was associated with animal-related issues and consumers who chose to identify as vegans, suggesting a niche marketing strategy that would only appeal to smaller groups. Yet, this 'playing it safe' strategy was not necessarily the whole story. The sentiment analysis showed that searching using the terms 'vegan' or 'plant-based' would often produce similar results (especially as most content creators use both hashtags or key terms to maximise their audiences). A close reading of the content being produced by vegan and plant-based brands, celebrities and activists suggested that the term plant-based may lack the clarity, emotional charge, or cultural meaning required for consumers to find, take an interest in, or respond, let alone create iconic or impactful brands and campaigns (see Holt 2004).

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Plant-based labels may become more clearly defined, more widely used and more meaningful (at the time of writing, for instance, The Vegetarian Society have just launched a plant-based trademark scheme). However, it may also become more ambiguous, overused and even meaningless, or at least find its meaning diluted. In our earlier report (***What's in a Name?***) we cautioned that plant-based could be a confusing label for consumers. However, the sentiment analysis suggests that it may also be a bland, uninspiring label. As participant 16 implies, even if 'vegan' can be polarising for some and stigmatised by others, this also means it is memorable, inspirational and so forth. As discussed later, further research is needed.

Even when social stereotypes were removed from the picture, the term vegan was associated with products that did not taste as good, were more difficult to cook, or required new techniques and recipes. Participants said that this was a hangover from the past, with contemporary and upcoming products being almost identical in taste, texture and cooking technique as meat (if not better in terms of health, taste and so forth). This view was especially prevalent in relation to high-tech laboratory-grown products (e.g. participants 15, 17, 19 and 20), but also featured in brands relying on natural ingredients (i.e. most of the other participants, but especially focused on by 3, 12, 14 and 18). These participants argued that the negative connotations of vegan food were associated with earlier products, but plant-based did not invoke these earlier associations and thus consumers may be more willing to try them with an open mind. Yet, as noted earlier, plant-based labels were not necessarily as 'neutral' as they appeared. Prior research shows that market change is a complex issue (Fischer and Giesler 2023; Giesler and Fischer 2017; Giesler and Thompson 2016). The present analysis suggests that it may be easier to update the meanings of vegan as a clear-cut label than it would be to leverage a more ambiguous term that means so many different things to many people that it is difficult to manage in a particular direction (Brown *et al.* 2013). Further research is needed – as discussed in the conclusions.

INTERLUDE: WORKING ASSUMPTIONS

All participants noted that these interpretations were largely anecdotal. This section unpacks this further. Certain participants cited surveys and other evidence to support their thinking, but even here there was an acknowledgement that more research was needed. These were working assumptions in the dual sense that they were acknowledged as assumptions, but they were assumptions that worked to help make decisions.

Crucially, all participants were open to evidence that could challenge their assumptions or change their working practices. However, the most common theme in the data was that 'vegan' was *potentially* negative, or at least more likely to be negative than 'plant-based'.

If brands adopted an either/or logic, the general theme was that 'plant-based' was a safer bet for brands. It was acknowledged that there was no legal definition of plant-based, especially by participant 1, who had a background in regulation, but generally it was assumed that consumers understood plant-based and vegan as synonymous. It was not clear how valuable a legal definition would be to brands. Indeed, prior studies have shown ambiguity can be useful, as it allows consumers to project their own meanings onto brands (Brown *et al.* 2013). What was clear was that the assumed conflation of vegan and plant-based labels led to another assumption that might be described as an asymmetry of loyalty between vegan and non-vegan consumers. On the vegan side, vegan consumers would be attracted to products that said vegan or plant-based, seeing both as indicating that no animal products were used. On the non-vegan side, non-vegan consumers (e.g. flexitarians) may be put off by the word vegan, even if they are open to or looking for products without animals (e.g. for health, perceived environmental benefits, or taste reasons).

Taken together, this suggests that using the term vegan would attract vegan consumers only, whereas plant-based could attract vegans and non-vegans. Thus, many brands worked with the logic that plant-based labelling could be used to expand their consumer base and make their brand more mainstream, whereas a vegan-centric brand would mean that they remain niche, mostly attracting consumers who strongly identified as vegan. “It's not just about being vegan”, said participant 5, “there are so many different people who are plant-based, flexitarian, climatarian ...” However, this remains a working assumption as the brands did not have (or claim to have) concrete evidence for this.

This logic had its parallels in other netnographic data. As noted earlier, an early pattern to emerge from the social media data was that searching for the keywords ‘vegan’ or ‘plant-based’ generated very similar content, with brands, influencers, and other posters using both hashtags or terms to promote their content. There was a discernible trend toward using the phrase plant-based more frequently or prominently, especially with the use of green colourings and natural symbols like leaf emojis. Yet, at the same time, the plant-based terminology was rarely used in isolation, perhaps suggesting an ambivalence about its clarity or desirability for consumers. For instance, during the netnography it also became clear that brands were finding many of their consumers were non-vegans who were purchasing for family members, friends, or colleagues with specific dietary requirements (e.g. dairy-free) or ethical beliefs (e.g. vegan). Given that these consumers were selecting for someone else, an ambiguous label like ‘plant-based’ could raise concerns. While vegan products may contain traces and are not necessarily allergen guarantees, there was a working assumption that a vegan product was a more reliable option for those trying to avoid animal-derived ingredients. Again, the sentiment analysis and brand interviews could not corroborate or refute these working assumptions, only demonstrate that they were shaping how brands and other stakeholders were thinking about, and acting within, the marketplace.

While some participants expressed these working assumptions as matters of fact, those who strongly identified with veganism described perceived asymmetries between the two terms as a 'shame'. Participant 8 and participant 19 were keen to change public perceptions around veganism, proudly using the term and even trying to use humour to challenge some of the negative stereotypes. "We're getting the word vegan out there," said participant 19, "I really believe in animal liberation." Again, the social media data reflect these themes. Where posts were explicitly vegan-centric, the term plant-based was often avoided altogether, or was used only in passing. This content usually sought to challenge stereotypes, with 'stitching' being a growing trend. A 'stitch' is where one social media poster samples video content from another, usually juxtaposing the first post's incorrect point of view with their own by stitching the two together into one video. Similar patterns are found in other studies and are usually described as polarising, oppositional, combative, and so on (Valor *et al.* 2021). The present analysis, however, finds most vegan-centric posts to be trying to deconstruct stereotypes using humour, educational resources, equity-based arguments (e.g. intersectionality), or simply providing personal evidence of the health benefits of veganism. In short, a more positive tone.

Other brands acknowledged the value of this kind of work, citing examples like VFC for positioning themselves as activist brands (e.g. participants 2, 6, and 12). However, generally this was seen as a high-risk strategy, both in the commercial risks of alienating consumers, but also in terms of risking social change, with most participants saying that saving animals was the main objective, regardless of how products were labelled and how people wanted to label themselves. Returning to our research question – whether plant-based labels help or hinder the vegan movement and Trademark – the issue here is how the goals of the movement and trademark is understood. In terms of reducing suffering on an animal-by-animal basis, anything and everything that works was welcome. However, those that define themselves as activist brands also emphasised how veganism should also lead to (and for some, required) a system-wide shift in values. In the sentiment analysis, content more prominently associated with (or earmarked as) vegan was more likely to explore how vegan worldviews intersected with anti-racism, feminism, and other progressive movements that did not simply wish to reduce or eliminate negative aspects of society (e.g. slavery, violence, or discrimination) but also induce and expand positive aspects (e.g. autonomy, flourishing, and diversity). For those who saw veganism in these broader, positive terms, the plant-based label was a stepping stone, one that could also limit the collective imagination around what is possible.

For many participants it was simply a matter of numbers – with vegans representing anywhere from 1% to 3% of the UK population (as noted earlier, most recent data suggests 1% for vegan), the market was simply not big enough to support most brands, even with promising survey data suggesting that more growth is on the way (Clark 2024; Wunsch 2024). Plant-based appealed to those who would eat non-animal (i.e. vegan) products but did not identify as vegan, which surveys suggest are a faster growing segment that already constitutes around a quarter of the population (Guadarrama *et al.* 2024). Yet, in keeping with the theme of this section, these are working assumptions. As only 2% identify as plant-based (The Vegan Society 2024), there were also open questions in the data around the extent to which flexitarians and other non-vegan consumers were consistently or significantly reducing their consumption of animal products, for instance, whether smaller steps like 'meat-free Mondays' actually engendered larger, more sustained changes, and how more stable and scalable markets for plant-based products could be established without leaning into veganism to some degree.

VEGAN *AND* PLANT-BASED?

The either/or logic favoured plant-based as a label, but most brands rejected this binary approach. Why not use both terms, vegan *and* plant-based?

Several brands interviewed used both terms in various combinations, with some changing these over time to reflect their changing perceptions of what consumers might want. For instance, some products featured 'plant-based' language prominently, but included phrases like 'suitable for vegans' in smaller font, on the side, or on the back. This approach was based on a variation of the asymmetry mentioned earlier, with non-vegans not looking for the word vegan, but vegans being willing to search an entire package for a vegan label or accreditation.

Although the term vegan was seen as potentially off-putting, this seemed to only be the case if vegan was used front and centre. If the word vegan featured alongside plant-based, especially if it was in a less prominent position (e.g. smaller or on the back), its potential negative effects were diminished because it was more of a product description rather than an identity position or political message. In the social media data, the terms 'vegan' and 'plant-based' were used interchangeably and uncontroversially for products, but when applied to people or principles these would become charged. User comments reproduced negative tropes. Arguably some might be bots; however, the purpose of the netnography was not to verify the identities of users, but simply to note cultural circulating themes and the role that they play within the marketplace (Kozinets and Gretzel 2024). Vegan brands and content creators would often be promoting the benefits of vegan lifestyles, the motivators for veganism and so forth. In stitches (discussed earlier) these would explicitly counter anti-vegan content, but elsewhere the tone was simply focusing on education and empowerment.

In such content the term plant-based might also be employed, but there was very little content that explicitly sought to explain the differences or define the two terms in relation to one another. For this reason many brands also valued official accreditation, such as that provided by The Vegan Society. Although some participants expressed a view that consumers were trusting enough to believe a brand that used the word vegan without accreditation, an external organisation was still seen as a powerful tool, with The Vegan Society's Vegan Trademark being referred to as "the gold standard" for vegan consumers (participant 12).

To clarify, The Vegan Society's Trademark standards are as follows;

No animal-derived ingredients or by-products in the finished product or anywhere along the supply chain.

The development and/or manufacture of the product, and its ingredients, must not involve or have involved, testing of any sort on animals conducted at the initiative of the company or on its behalf, or by parties over whom the company has effective control.

> *The sentiment analysis suggested that **the rise of misinformation is making consumers more concerned about claims and counter-claims***

Self-certification was discussed by some brands, but with notable ambivalence. It was unclear whether consumers valued third-party accreditation, and if so to what extent and under what conditions. To reiterate the arguments of activist brands and social media activists outlined earlier, it depended on whether the vegan label was merely a product description or whether it was also a signal of deeper values. In the former case, a working assumption was that brands were seen as generally trustworthy by consumers – though participant 1 spoke at length about how a rigorous accreditation process was valuable not only to reassure consumers, but to educate brands on how to improve their processes. In the latter case, the sentiment analysis suggested that the rise of misinformation is making consumers more concerned about claims and counter-claims. For instance, a recurring meme online shows milk being hidden in products that would usually be considered vegan by default. Although this seems to highlight a lack of transparency in terms of ingredients, it also hints at a deeper concern about brands' disingenuous relationship to veganism and vegan values.

A mixed or dual approach was therefore assumed to be a useful strategy to appeal to vegans and non-vegans at the same time. Although this does not necessarily require an accredited vegan logo (with 'suitable for vegans' or 'vegan' being used or some brands creating their own roundel), it does mean that any popularisation of plant-based labelling does not necessarily come at the expense of vegan labels, including The Vegan Society's Vegan Trademark. Yet, the sentiment analysis suggests that accreditation plays (at least) two roles: one is a literal or basic role as an indicator of ingredients—that is, confirming the absence of animal-derived components. Second, consumers may interpret such labels more broadly, treating them as symbolic or cultural markers aligned with certain ethical or environmental values. Navigating these two meanings could raise questions for consumers, but also brands. However, it is important to note that these labels do not, in themselves, verify sustainability practices or cultural commitments, and such interpretations may reflect consumer assumptions rather than substantiated claims. Participant 16, who worked with several vegan/plant-based brands, summarised this line of thinking as follows, "from a certification standpoint, I think it's really important to have vegan because for vegan consumers ... that's a marker of trust and quality. But in everything else ... so our marketing copy ... on social media, that's where we don't hone in on vegan ... vegan is a controversial term and it's loaded for a lot of consumers." At first glance, and following the initial analysis, this seems like a 'safe' approach. However, it also runs the risk of a brand appearing disingenuous. Even consumers who are not identifying as vegans themselves may be put off by brands that do not live their espoused value, as years of branding theory shows (Holt 2004).

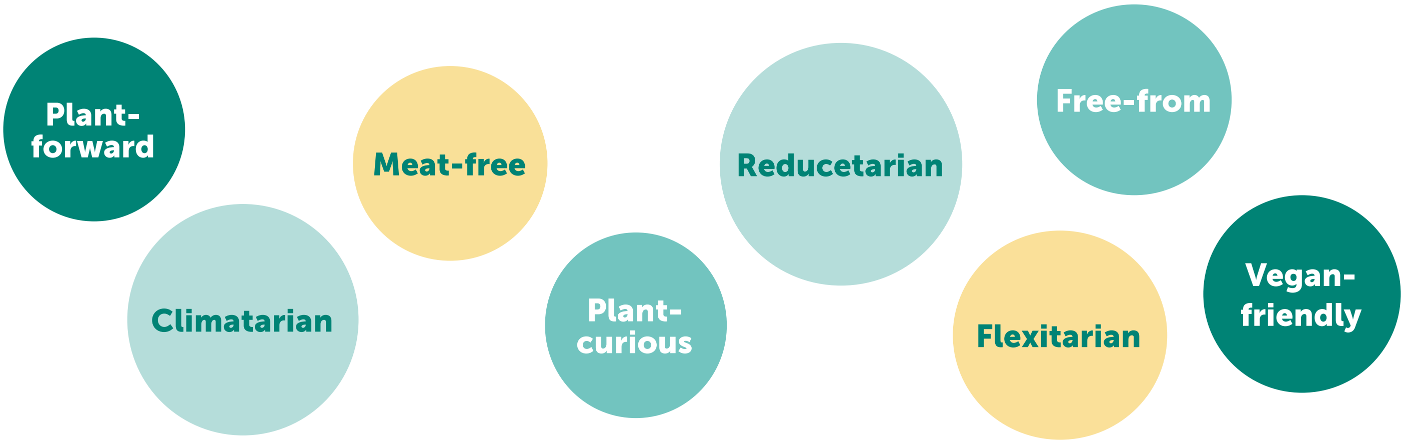
Another layer of complexity is added for brands that have a business-to-consumer and a business-to-business or retail/wholesale market, because the latter tend to prefer clearer labelling. As participant 5 explained, although their brand has moved from displaying 'vegan' prominently in marketing for consumers, they still describe themselves as '100%' or 'entirely' vegan for retail customers. In terms of literal, basic, or product accreditation, business-to-business marketing is far more concerned about accuracy and transparency. The present data set does not speak to whether metaphorical or cultural issues are as concerning for business-to-business customers, although the threat of reputational damage may be great for those brands that adopt value-driven marketing strategies. Further research on such working assumptions would be beneficial.

It is also interesting to note that a combined approach seems to work especially well in the beauty industry, when the vegan label is combined with cruelty-free labelling. For the beauty brands interviewed, the term 'plant-based' could work for certain products (implying natural ingredients, healthiness and so on), but was seen as less appropriate for others (e.g. those with more artificial ingredients or where too many natural ingredients might be interpreted as less efficacious). Cruelty-free has a long history in the beauty industry, with participants arguing that consumers have good awareness about (and an aversion to) animal testing for cosmetics. Participant 4 went so far as saying that cruelty-free was becoming an *expectation* in many markets (with one exception being China, where animal testing is still associated with safety), and pointed out that the term 'vegan' was interpreted positively when combined with 'cruelty-free' because it highlighted that no animal has been harmed. The negative stereotypes mentioned by other participants in other industries did not seem as important here.

Social media data affirm that different sectors, industries, or markets tend to favour slightly different terminology, but also that the concerns around vegan and plant-based terminology seem less pronounced. Cruelty-free is assumed to be clearly defined and, despite the central emphasis on a negatively valanced term ('cruelty'), seems to be positively regarded by brands and the consumers they research or work with. Yet, this leads into another approach – could brands dispense with vegan and plant-based altogether?

It is also interesting to note that ***a combined approach seems to work especially well in the beauty industry, when the vegan label is combined with cruelty-free labelling***

NEITHER VEGAN *NOR* PLANT-BASED?



As noted earlier, the meanings of the term plant-based were also shifting, with several participants concerned that it could accumulate negative associations if it (a) becomes synonymous with vegan stereotypes, (b) remains distinct, but is seen as an ill-defined, unreliable term, or (c) is seen as a fad (e.g. on social media).

The methodology adopted in this study could not speak to the changing meanings of plant-based (although several participants asked for research along these lines, as discussed in the penultimate section). What the data collected here *can* demonstrate, however, is that many other labels were already in circulation, albeit not used as frequently or prominently as plant-based or vegan.

On the last point, participants compared vegan products with free-from products for two reasons. First, many vegan products do not use dairy, eggs and other allergens, and so may be appealing to consumers who are not vegan for animal-related or environmental reasons, but still find vegan labelling a useful shortcut for health and safety reasons. It is important to caution here that **The Vegan Society** points out that vegan labelling does not necessarily mean that products are entirely guaranteed to be 'free-from' and have provided **detailed guidance** on different kinds of labelling. The above merely reflects the ways in which brand managers make informal or colloquial comparisons between the two markets. This leads to the second point, that the success of the free-from market in raising awareness (amongst consumers) and securing buy-in (from retailers creating a dedicated space) was something that many brands wanted to emulate. As participant 10 explained, some retailers currently mix vegan products alongside non-vegan products based on category (e.g. vegan alternatives to mince next to cow mince), whereas others have begun to create dedicated sections (but usually dotted around a store), whereas 'free-from' products have their own centralised space.

In the online space, these other terms were far less prominent. Examples like free-from also seemed to occupy a different cultural domain altogether, associated with allergy campaigning rather than animals, the environment, or health in a broader sense. Thus, while brands drew parallels to try and make sense of what a successful market can look like, consumers did not necessarily draw the same parallels. Indeed, while content creators might use terms like 'dairy-free' or 'nut-free' when describing the benefits of their recipes, these were secondary or tertiary considerations. Conversely, while a deep dive into the free-from market was beyond the scope of this research, exploratory data suggest that free-from consumers, brands and content creators do not draw consistent or salient connections to veganism, plant-based markets and animal-related social movements.

Indeed, not all participants wanted to emulate the free-from market, insofar as this would involve separating vegan products out and would hinder any attempts at popularising or normalising vegan lifestyles. Most participants seemed to endorse what participant 11 described as a 'norm-changing' approach where non-animal products were simply pervasive and thus began to be seen as normal. As part of this approach, even the label 'plant-based' could be too distinctive. Instead, several brands were looking to find ways to describe their products without using the term vegan or plant-based, or any similar label like plant-curious or vegan-friendly.

This could be described as a no-label or label-less approach, where brands describe their products using their ingredients (e.g. tofu or mushroom), so signal animal-free products without using any terms that they perceive to be loaded. For some start-up brands this was seen as an eventual end goal, with vegan and/or plant-based being preferred initially given high consumer awareness for these terms. However, this was (at the time of writing) an undefined space, with rapidly shifting technologies and regulations creating a great deal of uncertainty for brands, but also perceived opportunities to shape this terra incognita. In particular, this was also a consideration for brands that currently sold vegan/plant-based products, but were experimenting with 'lab-grown' innovations, which would not technically be vegan or plant-based, but could still be considered ethical. The philosophical or ethical debates around cultured meat lie outside the scope of the present study. Interested readers should read The Vegan Society's recent research briefing (Huntley and McLaren 2024). What is relevant here is that these issues were being considered by brands and further contributed to a sense that both vegan and plant-based may be problematic terms. For many brands the ideal label would be one with no negative connotations, one that signalled a product was suitable for vegans without alienating other groups. However, this perfect label (or label-less product strategy) was elusive. A minimalist approach that avoided as many connotations as possible may be more confusing for consumers who want clear direction on whether a brand suits their needs (both in terms of physical product characteristics and more cultural, identity or value-based considerations). This shift away from identity connotations may reflect a growing concern about brands being overly exposed in an era of identity politics (Nauta 2024), however it runs against the grain of much branding theory (Holt 2004). The ambiguity or 'boringness' of plant-based branding may therefore be as risky as using the vegan label – albeit in a different way and under different conditions.

Brands operating in multiple markets noted that the term vegan was used in multiple languages, whereas plant-based needed to be translated

As noted earlier, concepts like *ahimsa* exist in other cultures to capture notions like non-cruelty to animals, but these are more philosophical notions, not necessarily terms that can be applied to products or brands (participant 18). For this reason it is possible that established terms like vegan or plant-based may be popularised beyond the Global North, reinforcing their usefulness. Those brands operating in multiple markets noted that the term vegan was used in multiple languages, whereas plant-based needed to be translated and did not always work. As such, it may be that the global reach of the vegan label may outweigh any temporary or local concerns.

MORE RESEARCH NEEDED

To conclude thus far, participants generally agreed that 'vegan' could be considered high-risk with 'plant-based' being more neutral or positive, attractive to non-vegans without necessarily alienating vegans. Yet, they acknowledged that the meanings of the term 'plant-based' were not always clear and were subject to change, both over time and across cultures. A closer analysis suggested that plant-based was not necessarily a 'safe bet'. Rather than choosing between vegan or plant-based, most brands adopted a mixed or dual approach, but this could increase the likelihood of brands being seen as disingenuous or not clearly committed. Some brands were looking for a new label that could be informative without being off-putting to any potential consumer, but was difficult and came with its own risk of being seen as meaningless and uninspiring. Taken collectively, brands seemed to have a general sense that a 'plant-based-plus-vegan' labelling system was best, but they also felt that this rested on many assumptions and only a small amount of data or evidence. Seemingly simple labels of 'vegan' and 'plant-based' are fuzzy, dynamic and sometimes controversial, but at other times simply used in a nonchalant manner, with little concern or major significance. The general conclusion? More research is necessary.

Given the need for further research, all of the formal interviews finished by asking participants what they would like to ask or find out, if they could commission research. The labels 'vegan' and 'plant-based' are simply the most visible islands in a larger, tectonically shifting archipelago of actors, innovations and macrohistorical questions. A deeper and broader exploration is needed. However, as the purpose of a netnography is to provide a holistic picture that integrates a wide variety of patterns into a clearer framework, this report concludes by highlighting three key research questions that could provide focused next steps and make best use of limited resources:

1

Do consumers expect vegan brands to be 100% vegan? So, the owners are vegan, the entire business is vegan and so on... or is it less black and white now? (If so, is there a role for a more expansive Vegan Trademark that incorporates organisational culture, values and strategic vision and so forth? In effect, The Vegan Society's alternative to B Corp businesses).

2

How can we talk about veganism? How can brands tell the vegan story? It means 'no animals were used in the making of this product', but is there a way of telling this story to the typical consumer?

3

What is it that could encourage you to try vegan at the checkout? (Many participants' questions are looking beyond labels to price, quality and so forth. Perhaps we need to take a step back from our initial research question – do labels matter that much when other factors are at play?).

Before closing, however, let us again ask (and try to answer) our opening research question. Does the label 'plant-based' help or hinder the vegan movement and Vegan Trademark? This report has concluded by saying that more research is needed and that the present picture remains uncertain. However, emerging from the patterns in the data it appears there is an opportunity for veganism to be reclaimed as a label. Much of the concern around this term being polarising, risky, or identity-based is a working assumption, driven by prevailing cultural discourses, but not necessarily reflected in the everyday conversations and choices of consumers. There is certainly still much misinformation, misunderstanding and misapprehension around veganism amongst non-vegan consumers and brands, but this is not necessarily intractable. As noted earlier, perhaps the best way to transform the meaning of the vegan label is to work through the current complexities and concerns, rather than try to work around them by using another term like plant-based. Indeed, if plant-based labels are defined more clearly (and perhaps even legally defined or more widely accredited), it may simply become synonymic with vegan. The three earlier questions point us in a new direction, then: how might veganism be reclaimed?

CONCLUSIONS: SOME PRACTICAL TAKEAWAYS

Although more research is undoubtedly needed in this ambiguous and ever-shifting market, especially as the vegan movement continues to evolve, this research can still make some actionable suggestions for brands, entrepreneurs and others navigating this space. So, when it comes to the question of 'vegan or plant-based?', this report recommends the following steps for brands.

1 **Clarify for your consumer:** As outlined in our earlier report (***What's in a Name?***), consumers are confused by this shifting landscape of labels. Make it easy – what does this product contain and what does your brand avoid? If consumers can be clear that your offering has no animal-derived ingredients and that animals are not exploited at any stage, then this will allow them to make informed decisions that fit their needs and values. This is where the gold standard of independently verified trademarks can be useful, as they have brand recognition across a range of product categories and do much of the heavy lifting for you.

2 **Choose for your brand:** This research suggests that no label is neutral. Words like 'vegan' and phases like 'plant-based' carry connotations that vary between individuals and over time. While some felt that plant-based was less polarising, others pointed out it could be seen as confusing or boring and while some preferred vegan for its clarity, others were concerned it appealed most to those who identified as vegan. There is no one-size-fits-all choice, but this can be taken as a positive because it means each organisation can make a choice that suits the other elements of their brand identity, purpose and value proposition. So, the second suggestion is to choose purposefully – based on strategic alignment to your brand and by collecting as much evidence as possible – and to regularly return to that decision as your brand evolves or evidence changes. Our research makes the first suggestion for all brands – choose with purpose what fits your brand, your products and your consumer (see suggestion one). Similarly, you can use more than one label (and this report provides many different suggestions), but each brand should ask whether using two (or more) terms

adds additional value, or simply runs the risk of confusing the consumer (see suggestion one).

3 **Still deliberating? Collaborate!** Legislation is changing. Cultural associations are shifting. Attitudes and interpretation vary across markets, social groups and individuals. Even with more data and more research, these moving targets may make it difficult for brand decision-makers to put our first two suggestions into practice. Fortunately, an overarching theme from our research is that there is enough potential growth in the vegan/plant-based market to support many brands. Brands collaborating across different product lines, industries, or consumer segments can help one another to make important decisions (like vegan or plant-based labelling) without competing directly. Brands can also benefit from the work of non-profit organisations like The Vegan Society to better understand their consumers and market trends. The Vegan Trademark is a symbol with strong consumer recognition, but also an independent accreditation scheme that can help brands to better evaluate whether their own production processes, supply chains and brand positioning aligns to vegan definitions or vegan criteria.

What if you're an organisation trying to promote veganism – commercially, culturally, or otherwise?

4 **Take an evidence-based approach:** Our report highlights that many brands are making decisions using limited or mixed evidence, but that they are also open to revising their working assumptions – whatever works! If you are interacting with a brand or other group that assumes (for instance) that vegan is polarising, dig a little deeper into the evidence they are using for this. Work with them to build the case for veganism and vegan labels, by collecting further evidence or commissioning tailor-made research. Our report suggests that plant-based brands or those using other labels would be open to working constructively on their decision-making.

5 **Get ahead of the evidence:** The market and movement are both changing as societal views and technological possibilities are redrawing human relationships with animals, ecosystems and each other. What is a good evidence-based decision today may not be as relevant in a few months, even weeks. Furthermore, society and technology do not simply change by themselves, but due to the work of activists, journalists, teachers, inventors and many others who shift the public conversation, promote new investments and more. Rather than focusing on the present, vegan organisations can continue to work to redefine what labels mean for consumers. If vegan is polarising for some, then how can this be changed? If plant-based is distracting from animal-related reforms, then how can this be addressed? This report is a snapshot of meaning-making at a given point in time. There remains an opportunity to remake those meanings.

This report is a snapshot of meaning-making at a given point in time. ***There remains an opportunity to remake those meanings***

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