

the obvious advantages.

Now, all of this is ridiculous and totally unrealistic, and to go back to our original title, of course vegetable protein isn't going to be tomorrow's meat replacer, but the example I've given isn't too difficult to imagine from some of the views expressed outside the industry. We've heard this week all of the undeniable advantages of using soy and Gordon Harrington has spoken of soy complementing the meat industry, not competing with it, but the success and the

growth rate of our industry depends upon its image. Dr. Willner discussed the problems associated with the launch of vegetable protein into Sweden — from poor quality products and mistakes being made. It is vital that we continue to work to create the right image for our products, so that the situation I described earlier doesn't become a widespread concept of our industry aims.

We must ensure that we are seen as "angels" rather than "devils."

## How the Consumers Perceive Proteins

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This presentation will be limited to how consumers perceive soy proteins. When I began writing this paper, my thoughts touched on the following questions which I would like to cover during this short paper and the following discussion: (a.) why are consumer perceptions important; (b.) what is the available data on consumer perceptions of soy proteins; (c.) how have the consumers obtained their perceptions and how will they augment these perceptions in the future?

At least three factors argue for the importance of considering consumer perceptions.

First, the greatest importance generally associated with consumer perceptions derives from the psychological model that a person's attitudes and perceptions are a determinant of the person's behavior. Although this model is intuitively attractive, I personally am only a cautious and conditional supporter of this model. I do believe that the consumers' perceptions of a food can affect the consumers' propensity to buy that food, but this is a very difficult model to apply in commercial practice. Scientists have had more success refuting this psychological model than in confirming it.

A second importance of consumers' perceptions is the effect these perceptions can have on the writing of regulations. In general, regulators are limited to writing laws which are within the range of the consumers' perceptions.

A third importance of consumers' perceptions of soy proteins is the value of these in defining marketing strategies and tactics for foods which contain soy proteins. As an example of this practice, Cummings described how Cadburys used measures of consumer perceptions to determine their product objectives, product name, and colors for packaging.

The most complete consumer research on soy proteins which is public comes from the United States. This is the data base which I have relied on and on which I have developed my own conclusions to consumers' perceptions. Those of you who are interested in markets outside of the United States should still be able to find some value in this information as a standard for comparison; a base from which you can make adjustments to reflect the differences between the markets you are interested in and the U.S. markets. The available public research in the United States includes: (a.) focus groups discussions with housewives; (b.) telephone surveys of consumers; (c.) a national sample of consumer interviews; (d.) a test market of sausage containing isolated soy protein; (e.) and a national sample attitude survey sponsored by Food Protein Council and conducted by the Gallup Organization.

We could take the time to review each of the specific findings of these research efforts, but I do not believe it is appropriate to this forum or in the short time period we have. Therefore, I will review what I believe are some key findings from the Gallup study and then conclude with some of the observations that I have made on the combined

body of available consumer research. With respect to awareness, the Gallup study has two findings that are relevant. The first is that 33% of the consumers stated that the soybean would be the most important source of the protein in the future. This is the largest number of people to make this conclusion for any of the foods mentioned. The rest of the foods receiving less frequent mentions included beef, fish, powdered milk, cheese, peanuts and pork.

A second observation from the Gallup study relevant to awareness is that 54% of the consumers stated that they had eaten foods containing soy proteins during the last year. I believe these two observations indicate an exceptionally high level of awareness by consumers of soy proteins. This, therefore, gives a great deal of credibility to the other findings within the Gallup study. The Gallup study indicates an important finding with respect to relationship between soy proteins and food quality. Thirty-nine percent of the consumers said that soy protein improves the quality of the finished food. Twenty-six percent said that soy protein will have no effect on the finished foods quality. For the marketers of finished food products, this indicates that soy proteins can have a positive effect on the quality image of the foods in which they are used. However, from the soy protein industries' point of view, this result defines the consumers' expectations on the quality of foods which contain soy proteins, and in marketing you must meet the consumers' expectations in order to be successful.

Another significant finding of the Gallup study is the effect of soy protein being declared on the label of food products. Fifty percent of the consumers stated that the declaration of soy protein would have no effect on whether they will purchase the product or not. Additionally, 11% stated they are more likely to buy food products which declare soy protein as an ingredient. This finding is similar to other research that has been done in the area of soy protein declaration's effect on purchase behavior. In my own research, I have come to the conclusion that about 6% of the consumers do not want to buy any foods which contain soy protein. On the other hand, there is also another 6% of the consumers who would prefer to buy products because they contain soy protein. However, this implies that for about 85% to 95% of the consumers, the presence or absence of soy protein is not a significant factor in their purchase decision.

We can continue on like this — reciting specific data from research — but as I have indicated, this is probably not the proper place or time for this review. Therefore, we will not present the complete patchwork of data that has been accumulated. I will state a few of the conclusions that I have reached after analyzing the total body of available research.

From the analysis of the Gallup study and from Ralston

Purina's own research, it can be concluded that the more positive perceptions of soy proteins tend to be in the more affluent and educated segments of the market. This situation poses a challenge to the soy protein industry, since the more heavily promoted and salable aspect of soy proteins has been the economic value they provide in food. However, the research indicates that the most receptive market segment is the most capable of absorbing increasing food prices and the least responsive to economic arguments.

A second conclusion is that the consumers have a very limited experience with foods containing soy proteins or with information on soy protein. As a result, the perceptions which the consumers do hold – both positive or negative – are not strongly held. The consumer is still very flexible and receptive to new experiences and new information regarding soy proteins. Therefore, the consumer is still in an infant or developmental stage in the formation of their long term perceptions of soy proteins. We and the soy protein industry must be very cautious in the way we present our products to the consumers for this reason.

A third conclusion that I have reached is that consumers are not differentiating among the various types of soy

proteins. They are not differentiating among soy flour products, soy concentrate products and isolated soy proteins. Primarily, the consumer generalizes all "soy proteins" to be textured soy protein. This is for two reasons. The first is that the consumer can most easily understand the role of textured soy proteins. It is easy to comprehend that a particle soy protein replaces a particle of meat. A second reason for this generalization is that the consumer had had a conspicuous experience with textured soy proteins or foods containing textured soy proteins.

My final conclusion from the available consumer research is that the soy protein industry is in a dynamic market situation with respect to the consumers' perception of soy proteins. Positive perception of soy proteins by consumers in the future will depend upon the food industry's ability to repeatedly provide experiences with foods containing soy proteins which meet their expectations. This I cannot emphasize enough. We, in the soy protein industry and food industry, in order to obtain long term positive perceptions of food containing soy proteins, must meet the consumers' expectations.