# Results Online Survey V-Place

## Split by country

EIT Food is supported by the EIT
a body of the European Union

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# Background & Methodology

# Background

**V-Place Project**

- Creating a consumer centric online communication about sustainable & healthy food consumption
- Targeted & appealing to the general consumer that wants a meat-/ milk free diet (vegan, vegetarian) or try to reduce animal food products)
- Without facing nutritional deficits & while achieving sensory satisfaction

**Quantitative Online Survey**

- Get a clearer view on the current state of consumer attitudes and challenges regarding plant-based dairy and meat products
- Identify areas of improvement for companies and policy makers and feed the V-Place website with according information answering directly to the identified needs and barriers.

# Methodology – Intended Consumer Sample Online Survey

**01** **Sample size**

n=3000 (n=500 per country), recruited by an external panel provider

**02** **Countries**

France, Germany, Spain, Italy, Denmark, Poland

**03** **Gender**

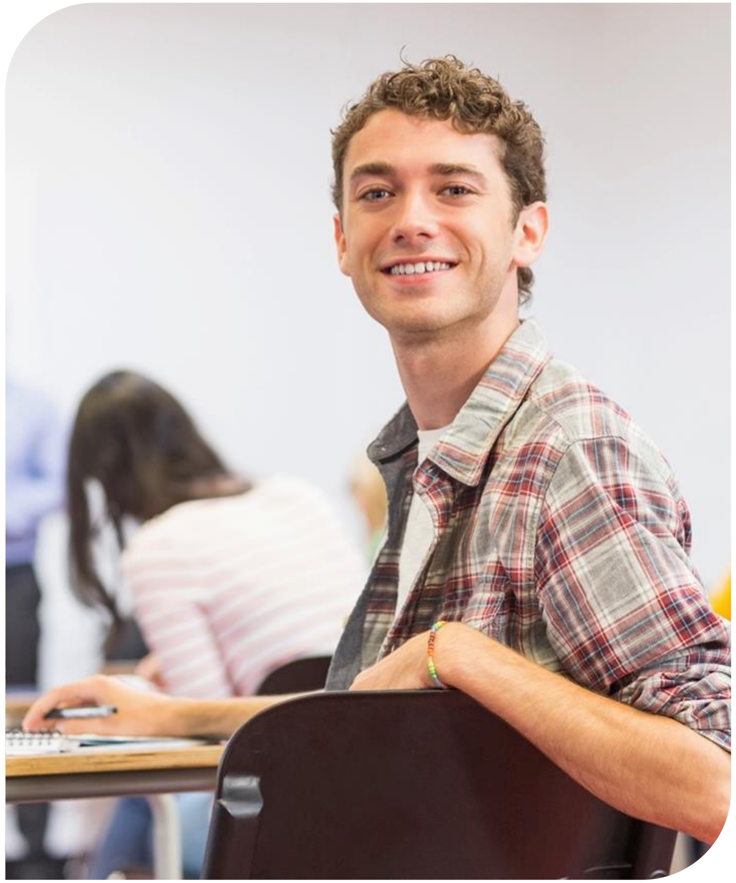
| | |
|---|---|
| Female | 50% |
| Male | 50% |

**04** **Age**

| | |
|---|---|
| 18-24 years | 20% |
| 25-34 years | 20% |
| 35-44 years | 20% |
| 45-54 years | 20% |
| 55-70 years | 20% |

**05** **Consumption behaviour plant-based food**

| | |
|---|---|
| Consumers | 40-50% |
| Intenders | 40-50% |
| Non-Consumer & Non-Intender | 0% |



# Methodology – Consumer Sample Qualified

**01** **Sample size**

n=3086, recruited by an external panel provider

**02** **Countries**

Denmark (16%), France (17%), Germany (17%), Italy (17%), Poland (17%), Spain (17%)

**03** **Gender**

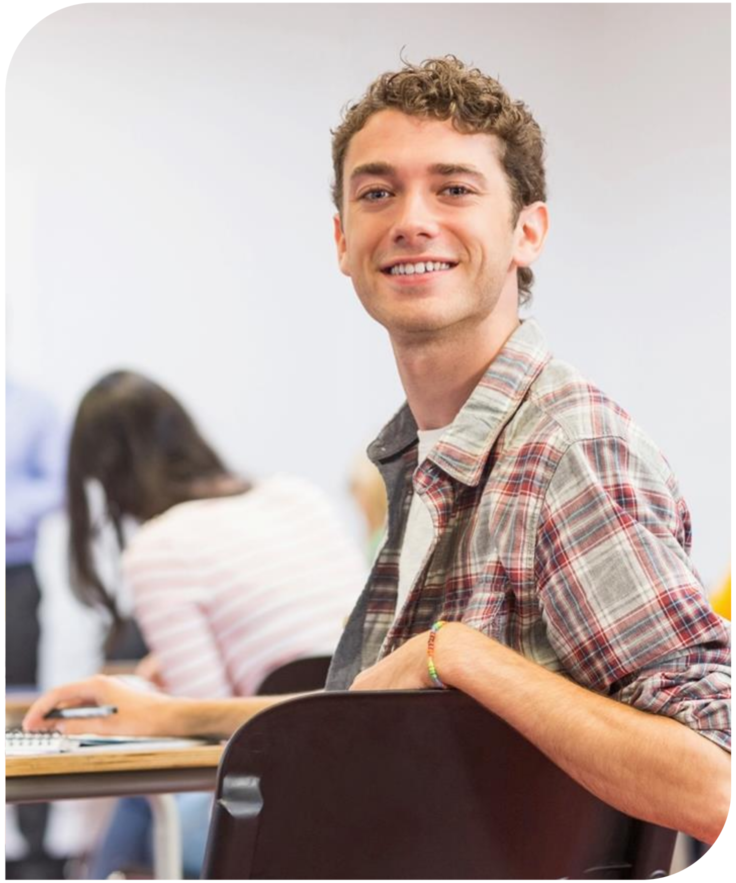
| | |
|---|---|
| Female | 50% |
| Male | 50% |

**04** **Age**

| | |
|---|---|
| 18-24 years | 21% |
| 25-34 years | 20% |
| 35-44 years | 20% |
| 45-54 years | 20% |
| 55-70 years | 20% |

**05** **Consumption behaviour plant-based food**

| | |
|---|---|
| Consumers | 75% |
| Intenders | 25% |
| Non-Consumer & Non-Intender | 0 % |



# Methodology – Consumer Sample including Screen Outs

**01** **Sample size**

n=4867, recruited by an external panel provider

**02** **Countries**

Denmark (22%), France (18%), Germany (17%), Italy (14%), Poland (15%), Spain (15%)

**03** **Gender**

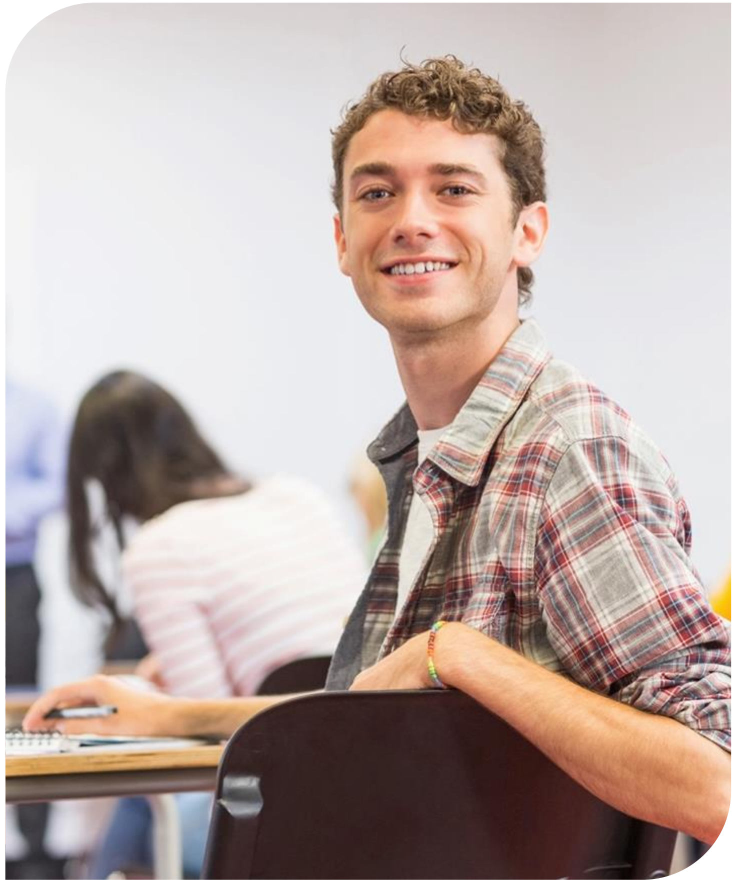
| | |
|---|---|
| Female | 49% |
| Male | 51% |

**04** **Age**

| | |
|---|---|
| 18-24 years | 15% |
| 25-34 years | 15% |
| 35-44 years | 19% |
| 45-54 years | 22% |
| 55-70 years | 29% |

**05** **Consumption behaviour plant-based food**

| | |
|---|---|
| Consumers | 47% |
| Intenders | 16% |
| Non-Consumer & Non-Intender | 37% |



# Quota Definitions

- Consumer: Consumption of plant-based dairy or meat products at least several times a month (S6 ≥ 4 in either a. PB Dairy or b. PB Meat AND S7 = 1-5 for PB Dairy AND/OR PB Meat)
- Intender: Consumption of plant-based dairy or meat products less than several times a month but is planning to consume more in the future (S6 = 1 in either a. PB Dairy or b. PB Meat OR BOTH AND S7 = 4-5 for PB dairy OR PB Meat OR both ; S6 = 2-3 in either a. PB Dairy or b. PB Meat OR BOTH AND S7 = 3-5 for PB dairy OR PB Meat OR both)
- Non-Consumer: Consumption of plant-based dairy or meat products less than several times a month and is not planning to consume more in the future

# Sections and number of participants

| Section | Description | Participants | Total | DK | FRA | GER | ITA | PL | ESP |
|---|---|---|---|---|---|---|---|---|---|
| Screener | Screener | All | 4867 | 1073 | 860 | 817 | 673 | 714 | 730 |
| Part A1 | PB Dairy shopping behavior & consumption | Users of category | 2789 | 428 | 476 | 472 | 464 | 481 | 468 |
| Part A2 | PB Dairy drivers, barriers & expectations | Users & Future Users of category | 2896 | 444 | 493 | 482 | 485 | 503 | 489 |
| Part B1 | PB Meat shopping behavior & consumption | Users of category | 2600 | 418 | 416 | 456 | 433 | 454 | 423 |
| Part B2 | PB Meat drivers, barriers & expectations | Users & Future Users of category | 2740 | 437 | 444 | 466 | 460 | 482 | 451 |
| Part C | Food related behavior & Interests | All qualified | 3086 | 500 | 514 | 516 | 516 | 522 | 528 |
| Part D | Information behavior | All qualified | 3086 | 500 | 514 | 516 | 516 | 522 | 528 |
| Part E | Sociodemographic | All qualified | 3086 | 500 | 514 | 516 | 516 | 522 | 528 |

# Question Overview Screener

| | |
|---|---|
| **S1** | Age? |
| **S2** | Please indicate your gender? |
| **S3** | Please indicate the diet style which currently fits you the best? |
| **S4** | How long have you been following your current diet style? |
| **S5** | Do you intend to increase or to reduce the consumption of the following food categories in the future? |
| **S6** | How often do you currently consume the following plant-based food categories? |
| **S7** | Do you intend to increase or to reduce the consumption of the following plant-based food categories in the future? |
| **C1** | Non-Consumer, Intender & Consumer Distribution |
| **C2** | Intender, Moderate User & Heavy User Distribution |

# Question Overview Part A

| | |
|---|---|
| **Q1** | To what extend are you using/choosing plant-based dairy products (with plant-based alternatives) instead of conventional dairy products, e.g. soy/oat milk instead of cow milk; coconut yoghurt instead of cow yoghurt? |
| **Q2** | How often do you consume the following plant-based dairy products? |
| **Q3** | Where do you purchase plant-based dairy products most frequently from? |
| **Q4** | Rate how important the following reasons are for your choice to consume plant-based dairy products over conventional ones (IF you are NOT consuming plant-based dairy products currently, rate how important the following reasons are for you to choose this category in the future)? |
| **Q5** | To what extent do you agree with the following statements? I find it challenging to increase my current plant-based dairy products consumption because … |
| **Q6** | For which plant-based dairy products groups would you wish to see a greater variety of? |
| **Q7** | What are your wishes regarding the taste/flavour of plant-based dairy products? |
| **Q8** | What are your wishes regarding the mouthfeel of plant-based dairy products? |
| **Q9** | What are your wishes regarding the nutritional content of plant-based dairy products? |
| **Q10** | To what extent do you agree with the following statements? |

# Question Overview Part B

| | |
|---|---|
| **Q11** | To what extend are you using/choosing plant-based alternatives over conventional meat products, e.g. plant-protein burger patties over beef burger patties; plant-protein nuggets over chicken nuggets? |
| **Q12** | How often do you consume the following plant-based meat product alternatives? |
| **Q13** | Where do you purchase plant-based meat_products more frequently from? Please select max 3 answers |
| **Q14** | Rate how important the following reasons are for your choice to consume plant-based meat products over conventional ones (IF you are NOT consuming plant-based meat products currently, rate how important the following reasons are for you to choose this category in the future) |
| **Q15** | To what extent do you agree with the following statements? I find it challenging to increase my current plant-based meat products consumption because… |
| **Q16** | For which plant-based meat products would you wish to see a greater variety of? Select all that apply from the list below |
| **Q17** | Which of the following would you wish to have as a main ingredient for your plant-based meat products? |
| **Q18** | What are your wishes regarding the taste/flavour of plant-based meat products? Please check all that apply |
| **Q19** | What are your wishes regarding the mouthfeel of plant-based meat products? Please check all that apply. |
| **Q20** | What are your wishes regarding the nutritional content of plant-based meat products? |
| **Q21** | To what extent do you agree with the following statements? |

# Question Overview Part C

| | |
|---|---|
| **Q22** | Who is responsible for food shopping in your household? |
| **Q23** | What is the share of organic food products in your diet? |
| **Q24** | Where do you purchase food products most frequently from? Please select max 3 answers |
| **Q25** | Who is responsible for preparing the food in your household? |
| **Q26** | Which are the most important factors when choosing a food product? Please select max 5 answers |

# Question Overview Part D

| | |
|---|---|
| **Q27** | Which of the following information sources, do you consider the most trustworthy ones, when acquiring food related information? |
| **Q28** | When it comes to acquiring food related information, what are the most attractive formats for you? |
| **Q29** | When it comes to acquiring food related information, where are you most likely to search for it? |
| **Q30** | Are you searching for information about plant-based diets and products? |
| **Q31** | What kind of information would you wish to know about, in terms of plant-based food diets and products? |
| **Q32** | If you could ask a question to a producer of plant-based products, what would that be? |
| **Q33** | Have you ever heard of negative headlines or disturbing issues in the context of plant-based food products? |
| **Q34** | To which of the following topics were these negative headlines or issues related to? Please select all that apply |
| **Q35** | In your opinion, were these negative claims supported/ legitimate? |
| **Q36** | How did your purchasing behaviour of plant-based products change when you heard about these problems or headlines? |
| **Q37** | Indicate from the following options how COVID-19 has affected your food consumption in terms of plant-based and animal products. |

# Question Overview Part E

| | |
|---|---|
| **Q38** | How would you describe your household? |
| **Q39** | How many children live in your household? |
| **Q40** | What is your total annual household income before taxes? |
| **Q41** | What is the highest degree or level of education you have completed? If currently enrolled, indicate highest degree achieved |
| **Q42** | Please indicate the occupation that currently suits you best |

# Summary

# Plant-based dairy and meat products

## Consumption & Diet Style

**Plant-based Milk** is the most frequent consumed plant-based dairy product

Among plant-based meat **Burger Patties** are the most commonly consumed

Majority of **consumers of plant-based dairy products do not define their self as flexitarian,** whereas the majority of the **plant-based meat consumers define their self as flexitarian** . Amount of Flexitarians is increasing most in Germany and Italy

More **consumers want to reduce meat consumption** than milk consumption.

**Consumers who do not eat plant-based products** at the moment are not planning to increase their consumption in the future. The attitude and challenges of this group needs to be analyzed in an **additional study**.

**Spain, Poland & Italy** have the highest consumption frequency for plant-based dairy or meat products. **Denmark** has the highest amount of consumers that have not consumed plant-based dairy or meat products until now.

Participants in this study plan to consume more plant-based products in the future or are already consuming them

Total: n=3086 | Denmark: n=500 | France: n=514 | Germany: n=516 | Italy: n=516 | Poland: n=522 | Spain: n=528

# Plant-based dairy products

## Challenges and expectations

**Health benefits, well being** and **naturalness** are important reasons to choose plant-based dairy products. **Environmental consciousness** is only in Germany, Denmark and France among the top-3 reasons

**Price, availability and limited product choice** of plant-based dairy products are the biggest barriers for consumers

Most consumers wishes that **taste is equivalent** and **mouthfeel is similar** to the conventional dairy product. Distinct consumer clusters exist, who want a completely new or the taste of the plant-based ingredient

Consumers wish to see a greater variety of **yoghurt** and **hard/soft cheese**

**Lower sugar content , lower fat content** and **fewer calories** are among the top-3 wishes regarding nutritional content of plant-based dairy products. Poland is the only country having **fortification with vitamins** and **minerals** within the top-3

Participants in this study plan to consume more plant-based products in the future or are already consuming them
Total: n=3086 | Denmark: n=500 | France: n=514 | Germany: n=516 | Italy: n=516 | Poland: n=522 | Spain: n=528

# Plant-based meat products

## Challenges and expectations

**Health benefits, taste** and **well-being** are important reasons to choose plant-based meat products. **Animal welfare** is only in Italy and Germany among the top-3 reasons.

**Price, availability and limited product choice** of plant-based meat products are the biggest barriers for consumers

Most consumers wishes that **taste is equivalent** and **mouthfeel is similar** to the conventional meat product. Distinct consumer clusters exist, who want a completely new or the taste of the plant-based ingredient

Consumers wish to see a greater variety of **burger patties, steak/schnitzel** and **sausages**

**Lower fat , higher protein and lower salt content** are among the top-3 wishes regarding nutritional content of plant-based meat products. Poland is the only country having **fortification with vitamins** and **minerals** within the top-3

Participants in this study plan to consume more plant-based products in the future or are already consuming them

Total: n=3086 | Denmark: n=500 | France: n=514 | Germany: n=516 | Italy: n=516 | Poland: n=522 | Spain: n=528

# Communication

## Information sources and formats

**Nutritional professionals, health professionals and scientists** are seen as the most trustworthy information sources. **Independent consumer organizations** are the most trustworthy in Germany and **governmental organizations** in Denmark

**Product tests, product packaging** and **tastings** are the most attractive formats

Majority of the consumers is searching **online (Internet & websites)** for food related information

Consumers would like to have more information about **recipes, ingredients and their origin** and **health benefits/issues related to consumption**

Minority of the consumers have heard about negative headlines concerning plant-based nutrition. Negative news were about **nutritional deficiencies** and **genetic modification**

Consumers want to know **why plant-based products are more expensive** than traditional ones and **how they are produced**

Participants in this study plan to consume more plant-based products in the future or are already consuming them

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Food

**Improving food together.**

eitfood.eu

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