Results Online Survey V-Place

Split by user category

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DÖHLER
NATURAL FOOD & BEVERAGE INGREDIENTS

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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**

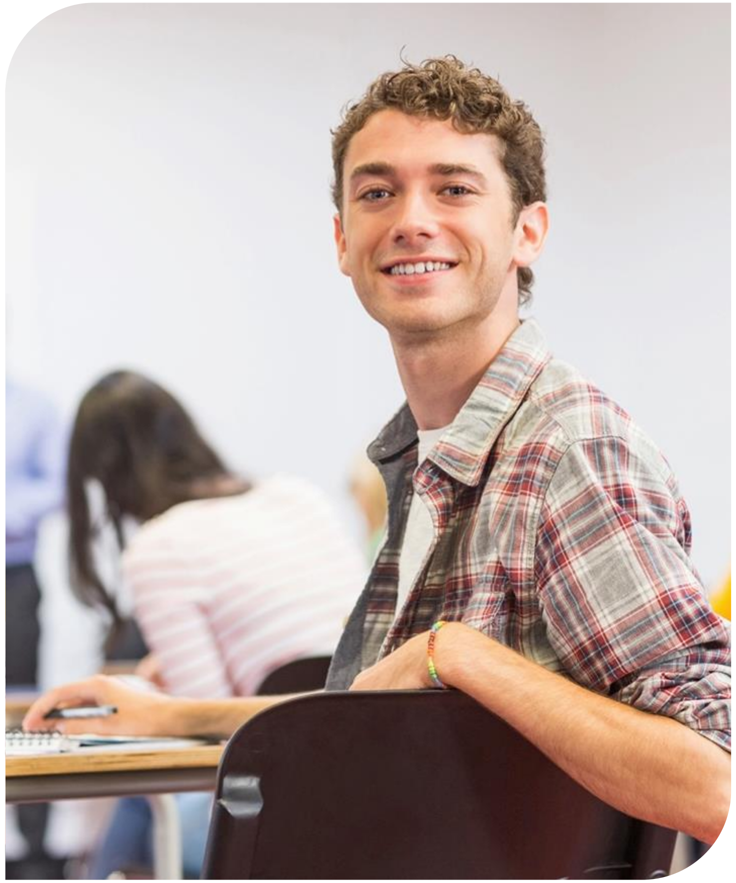
Female	50%
Male	50%

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%
Future Users	40-50%
Non-Consumer & Non-Future User	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**

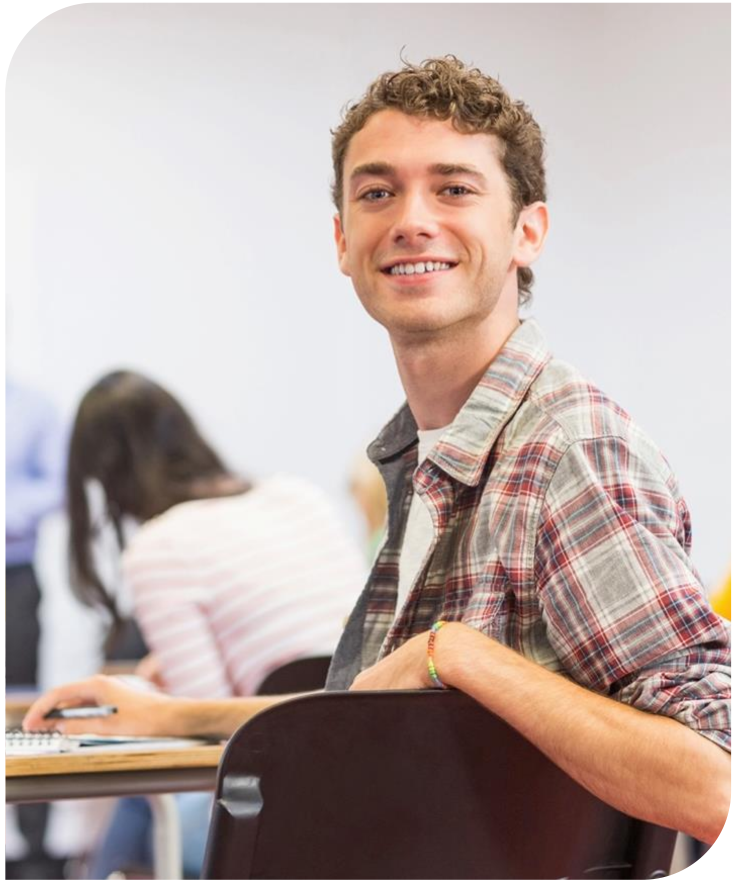
Female	50%
Male	50%

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%
Future Users (Former Intenders)	25%
Non-Consumer & Non-Future User	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**

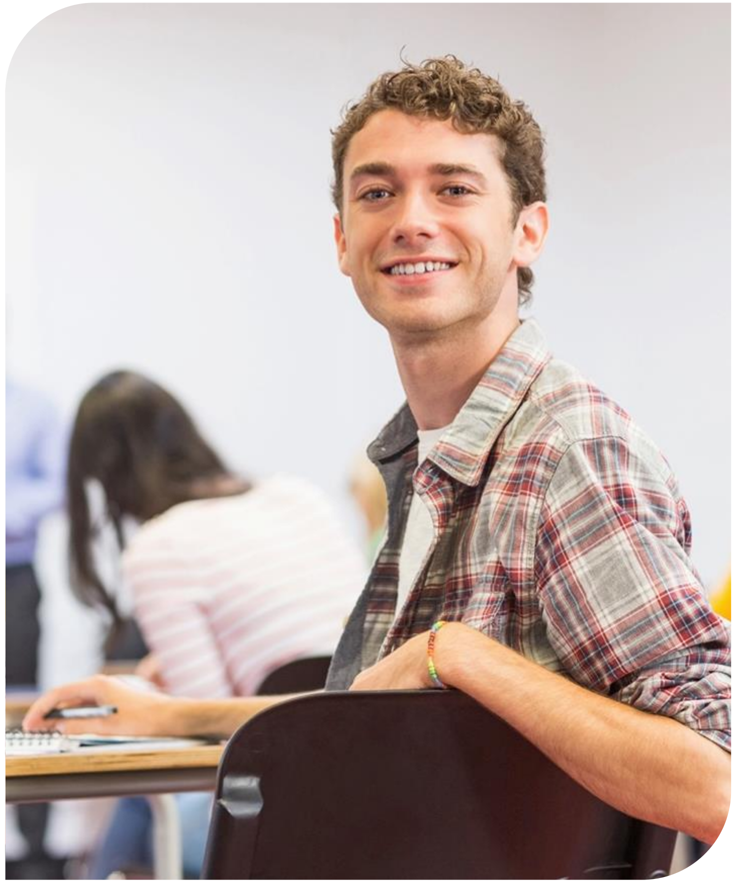
Female	49%
Male	51%

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%
Future Users (Former Intender)	16%
Non-Consumer & Non-Future User	37%



Quota Definitions for recruitment

- 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)
- Future User: No consumption of plant-based dairy or meat products but is planning to consume more in the future and participants consuming plant-based dairy or meat products once a month or several times a month and is not planning to consume less 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 (Q6=1 **AND** Q7≤3 **for BOTH** PB Dairy and PB Meat or Q6=2-3 **AND** Q7≤2 **for BOTH** PB Dairy and PB Meat)

Category Definitions PB Dairy Products for User Split Analysis

- Non-User: Consumption of plant-based dairy products less than several times a month and is not planning to consume more in the future
- Future User: No consumption of plant-based dairy products but is planning to consume more in the future and participants consuming plant-based dairy products once a month or several times a month and is not planning to consume less in the future (S6 = 1 in PB Dairy AND S7 = 4-5 for PB dairy ; S6 = 2-3 in PB Dairy AND S7 = 3-5 for PB dairy)
- Moderate User: Consumption of plant-based dairy products   several times a month or once a week (S6 = 4 or 5 PB Dairy AND S7 = 1-5 for PB Dairy)
- Heavy User: Consumption of plant-based dairy products several times a week or daily (S6 = 6 or 7 PB Dairy AND S7 = 1-5 for PB Dairy)

Category Definitions PB Meat Products for User Split Analysis

- Non-User: Consumption of plant-based meat products less than several times a month and is not planning to consume more in the future
- Future User: No consumption of plant-based meat products but is planning to consume more in the future and participants consuming plant-based meat products once a month or several times a month and is not planning to consume less in the future(S6 = 1 in PB Dairy AND S7 = 4-5 for PB dairy ; S6 = 2-3 in PB Dairy AND S7 = 3-5 for PB dairy)
- Moderate User: Consumption of plant-based dairy products   several times a month or once a week (S6 = 4 or 5 PB Dairy AND S7 = 1-5 for PB Dairy)
- Heavy User: Consumption of plant-based dairy products several times a week or daily (S6 = 6 or 7 PB Dairy AND S7 = 1-5 for PB Dairy)

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

Sections and number of participants – PB Dairy User Total

Section	Description	Participants	Total	DK	FRA	GER	ITA	PL	ESP
Screener	Screener	All	2847	433	487	472	474	499	482
Part A1	PB Dairy shopping behavior & consumption	Users of category	2740	417	470	462	453	477	461
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	2847	433	487	472	474	499	482
Part B1	PB Meat shopping behavior & consumption	Users of category	2498	392	402	442	412	444	406
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	2847	433	487	472	474	499	482
Part C	Food related behavior & Interests	All qualified	2847	433	487	472	474	499	482
Part D	Information behavior	All qualified	2847	433	487	472	474	499	482
Part E	Sociodemographic	All qualified	2847	433	487	472	474	499	482

Sections and number of participants – PB Meat User Total

Section	Description	Participants	Total	DK	FRA	GER	ITA	PL	ESP
Screener	Screener	All	2664	425	429	458	449	459	444
Part A1	PB Dairy shopping behavior & consumption	Users of category	2398	360	394	418	401	424	401
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	2664	425	429	458	449	459	444
Part B1	PB Meat shopping behavior & consumption	Users of category	2524	406	401	448	422	431	416
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	2664	425	429	458	449	459	444
Part C	Food related behavior & Interests	All qualified	2664	425	429	458	449	459	444
Part D	Information behavior	All qualified	2664	425	429	458	449	459	444
Part E	Sociodemographic	All qualified	2664	425	429	458	449	459	444

Sections and number of participants for user categories

Denmark

Section	Description	Participants	PB Dairy				PB Meat			
			Future	Moderate	Heavy	Total	Future	Moderate	Heavy	Total
Screener	Screener	All	148	149	136	433	177	151	97	425
Part A1	PB Dairy shopping behavior & consumption	Users of category	132	149	136	417	132	135	93	360
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	148	149	136	433	177	151	97	425
Part B1	PB Meat shopping behavior & consumption	Users of category	145	128	119	392	158	151	97	406
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	148	149	136	433	177	151	97	425
Part C	Food related behavior & Interests	All qualified	148	149	136	433	177	151	97	425
Part D	Information behavior	All qualified	148	149	136	433	177	151	97	425
Part E	Sociodemographic	All qualified	148	149	136	433	177	151	97	425

Sections and number of participants for user categories

France

Section	Description	Participants	PB Dairy				PB Meat			
			Future	Moderate	Heavy	Total	Future	Moderate	Heavy	Total
Screener	Screener	All	135	156	196	487	144	172	113	429
Part A1	PB Dairy shopping behavior & consumption	Users of category	118	156	196	470	121	164	109	394
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	135	156	196	487	144	172	113	429
Part B1	PB Meat shopping behavior & consumption	Users of category	95	134	173	402	116	172	113	401
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	135	156	196	487	144	172	113	429
Part C	Food related behavior & Interests	All qualified	135	156	196	487	144	172	113	429
Part D	Information behavior	All qualified	135	156	196	487	144	172	113	429
Part E	Sociodemographic	All qualified	135	156	196	487	144	172	113	429

Sections and number of participants for user categories

Germany

Section	Description	Participants	PB Dairy				PB Meat			
			Future	Moderate	Heavy	Total	Future	Moderate	Heavy	Total
Screener	Screener	All	138	165	169	472	153	195	110	458
Part A1	PB Dairy shopping behavior & consumption	Users of category	128	165	169	462	123	186	109	418
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	138	165	169	472	153	195	110	458
Part B1	PB Meat shopping behavior & consumption	Users of category	138	145	159	442	143	195	110	448
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	138	165	169	472	153	195	110	458
Part C	Food related behavior & Interests	All qualified	138	165	169	472	153	195	110	458
Part D	Information behavior	All qualified	138	165	169	472	153	195	110	458
Part E	Sociodemographic	All qualified	138	165	169	472	153	195	110	458

Sections and number of participants for user categories

Italy

Section	Description	Participants	PB Dairy				PB Meat			
			Future	Moderate	Heavy	Total	Future	Moderate	Heavy	Total
Screener	Screener	All	123	172	179	474	152	171	126	449
Part A1	PB Dairy shopping behavior & consumption	Users of category	102	172	179	453	115	162	124	401
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	123	172	179	474	152	171	126	449
Part B1	PB Meat shopping behavior & consumption	Users of category	100	152	160	412	125	171	126	422
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	123	172	179	474	152	171	126	449
Part C	Food related behavior & Interests	All qualified	123	172	179	474	152	171	126	449
Part D	Information behavior	All qualified	123	172	179	474	152	171	126	449
Part E	Sociodemographic	All qualified	123	172	179	474	152	171	126	449

Sections and number of participants for user categories

Poland

Section	Description	Participants	PB Dairy				PB Meat			
			Future	Moderate	Heavy	Total	Future	Moderate	Heavy	Total
Screener	Screener	All	130	197	172	499	158	174	127	459
Part A1	PB Dairy shopping behavior & consumption	Users of category	108	197	172	477	130	171	123	424
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	130	197	172	499	158	174	127	459
Part B1	PB Meat shopping behavior & consumption	Users of category	97	183	164	444	130	174	127	431
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	130	197	172	499	158	174	127	459
Part C	Food related behavior & Interests	All qualified	130	197	172	499	158	174	127	459
Part D	Information behavior	All qualified	130	197	172	499	158	174	127	459
Part E	Sociodemographic	All qualified	130	197	172	499	158	174	127	459

Sections and number of participants for user categories

Spain

Section	Description	Participants	PB Dairy				PB Meat			
			Future	Moderate	Heavy	Total	Future	Moderate	Heavy	Total
Screener	Screener	All	122	156	204	482	162	167	115	444
Part A1	PB Dairy shopping behavior & consumption	Users of category	101	156	204	461	130	158	113	401
Part A2	PB Dairy drivers, barriers & expectations	Users & Future Users of category	122	156	204	482	162	167	115	444
Part B1	PB Meat shopping behavior & consumption	Users of category	104	132	170	406	134	167	115	416
Part B2	PB Meat drivers, barriers & expectations	Users & Future Users of category	122	156	204	482	162	167	115	444
Part C	Food related behavior & Interests	All qualified	122	156	204	482	162	167	115	444
Part D	Information behavior	All qualified	122	156	204	482	162	167	115	444
Part E	Sociodemographic	All qualified	122	156	204	482	162	167	115	444

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, Future User & Consumer Distribution
C2	Future User, 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 in every user category.

Among plant-based meat **Burger Patties** are the most commonly consumed among all user categories. **Tofu** is among the Top-3 in Germany, Spain and Poland in the plant based meat heavy user group

Majority of **plant-based dairy heavy users in Germany define their self as flexitarian,** whereas in other countries the majority of heavy users describe their self as omnivore. **Majority of Future Users describe their self as omnivore** across all countries

Heavy and moderate users are more likely to reduce dairy and meat consumption than future users

Moderate and heavy users are more willing to increase their plant-based dairy and meat consumption than future users. Additional analysis focusing on consumers willing to increase their plant-based products consumption independent of the consumption frequency should be considered.

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

Reasons for choosing plant-based dairy products vary widely between countries and user groups (interaction). In Germany, heavy users consider environmental consciousness to be important, while future user considers taste as important. In France health benefits are most important among all user groups

Price, availability and limited product choice of plant-based dairy products are the biggest barriers for all user groups across countries. Lack of knowledge is a bigger challenge for future users compared to heavy users. Future users are more price sensitive compared to heavy users.

Future users wish that **taste is equivalent** and **mouthfeel is similar** to the conventional dairy product.

Consumers wish to see a greater variety of **yoghurt** across all countries and user groups. **Future users in Spain** choose **ice cream and desserts** as second, whereas in **Germany cheese is more relevant**

Lower sugar content , lower fat content and **fewer calories** are among the top-3 wishes regarding nutritional content of plant-based dairy products among all user groups.

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

Reasons for choosing plant-based meat products vary widely between countries and user groups (interaction). In Germany, heavy users consider animal welfare to be important, while future user considers taste important. In France Health Benefits is most important among all user groups

Price, availability and limited product choice of plant-based meat products are the biggest barriers for all user groups across countries. Lack of knowledge is a bigger challenge for future users compared to heavy users.

Future users wish that **taste is equivalent** and **mouthfeel is similar** to the conventional meat product.

Consumers wish to see a greater variety of **burger patties, steak/schnitzel** and **sausages. German future users** would like to have greater variety for **slices and toppings.**

Lower fat , higher protein and lower salt content are among the top-3 wishes regarding nutritional content of plant-based meat products.

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

Independent consumer organizations are the most trustworthy for future users in Germany and **governmental organizations** in Denmark

Product packaging is the most attractive format for future users. Future users look less frequnetly for information about plant-based food than moderate or heavy users

Future users are searching more often **online (Internet & websites)** for food related information

German future users would like to have more information about additives and what plant-based products contain. Value for money ratio and naturalness/less additives is more important for future users

Covid-19 did not affect the consumption behavior of future users. Most of the future users did not change their consumption behavior in the last two years

Moderate and heavy users are more likely to purchase food in an **organic supermarket**

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

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