PLANT-BASED FOR THE FUTURE II

Insights on European consumer preferences, opinions and demands for plant-based meat and dairy alternatives

DÖHLER NATURAL FOOD & BEVERAGE INGREDIENTS

eit Food

UNIVERSITÄT HOHENHEIM

DANONE NUTRICIA RESEARCH

AARHUS UNIVERSITY

Findings included in this paper are based on the results of a quantitative study conceived in cooperation by Dr. René Nachtsheim (Döhler), Prof. Derek V. Byrne, Dr. Niki Alexi (Aarhus University), Dr. Beate Gebhardt (University of Hohenheim), and Dr. Aukje Verhoeven (Danone) as part of the 2020 EIT Food project "The V-Place – Enabling consumer choice in Vegan or Vegetarian Food Products" led by the Hohenheim Research Center for Bioeconomy at the University of Hohenheim, Germany

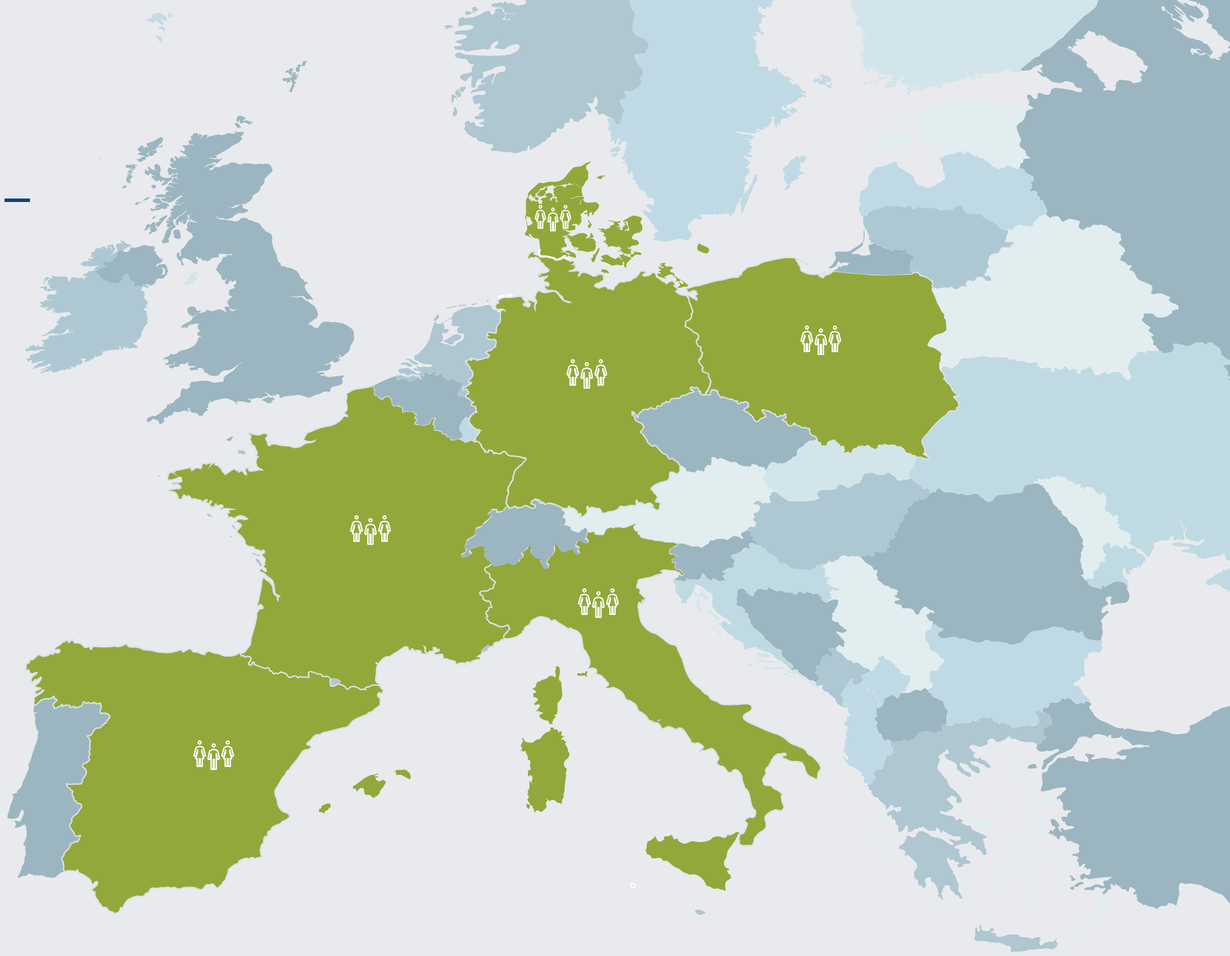
PLANT-BASED FOOD IN EUROPE – SCOPE OF THIS STUDY

Plant-based food items such as alternatives to meat and dairy have made their ways into the European food retailing industry. The increasing number of product novelties together with the rising consumer demands suggest that this product category is here to stay.

The research this paper is based upon was conducted as part of the EU funded V-Place project, intended to explore and support the growing group of consumers who already purchase plant-based products or who are interested in reducing animal-sourced food items in their diet.

Consumers between the ages of 18 and 70 from Spain, France, Italy, Germany, Denmark and Poland were surveyed to get a clearer picture on the current state of attitudes and challenges they experience regarding plant-based dairy and meat products.

Further insights were gathered to identify areas of improvement for companies and policy makers to support the consumers' demands and wishes by reacting directly to the identified needs and barriers.



This study aimed to gain insights on the thoughts and behaviours of Europeans that either currently consume plant-based meat and dairy alternatives ("consumers") or intend to do so in the future ("future users").

Participants who did not consume and did not intend on consuming plant-based alternatives ("non-consumers") were identified and screened out with a set of screening questions.

In total, the sample size of this study including screen-outs was 4867.
The qualified consumer sample (without screen-outs) consisted of 3086 participants of whom 75% were identified as consumers and 25% as future users.

PRODUCTS & LIFESTYLES – TERMINOLOGY AND IMPORTANT DIFFERENCES

Product variety, labels, lifestyles, and eating habits have evolved throughout the last decade and have certainly become more complex. When discussing different products and eating habits, it is important to be precise in terminology to ensure clarity and avoid misunderstandings. In the various countries of the survey, the words in the native language may have more nuanced connotations.

PRODUCT PROPERTIES

- **Vegan** – Vegan products do not contain any animal-based ingredients, such as meat, fish, dairy, eggs and honey. The production process must not use animal-derived products either, such as gelatine for clarifying juice or wine, or animal-based glue for product packaging.
- **Vegetarian** – Vegetarian foods exclude meat and fish, but may include ingredients like dairy, eggs, and honey.
- **Plant-based** – For food, the term plant-based refers only to a processed product's ingredients. A plant-based product does not contain any animal-based ingredients.
- **Plant food** – Plant foods refer to unprocessed plants that are part of the human diet, such as fruit, vegetables, legumes and spices.

EATING HABITS

Vegan
Vegans refrain from including any animal based products in their diet, thus excluding meat, fish, dairy, eggs, honey, etc. Their diet may consist of plant foods and processed foods that purely contain plant-based ingredients.

Vegetarian
A vegetarian diet includes animal-based ingredients but no meat. Therefore, eggs, dairy and honey may be included whereas meat and fish are excluded.

Pescetarian
Like vegetarians, pescetarians consume animal-based ingredients, such as milk, eggs and honey, but cut out meat. Pescetarians do add fish to their meal plans.

Flexitarian*
Flexitarians deliberately aim to reduce animal products in their diet, but do not strictly exclude any food group.

Omnivore
An omnivore diet does not exclude any foods or food groups.

* Definition used in the context of this Whitepaper. The flexitarian share of consumers is harder to pinpoint compared to other consumer groups.

CONSUMERS OF PLANT-BASED DAIRY AND MEAT PRODUCTS

A GROWING NUMBER OF CONSUMERS WISH TO REDUCE THEIR CONSUMPTION OF ANIMAL PRODUCTS

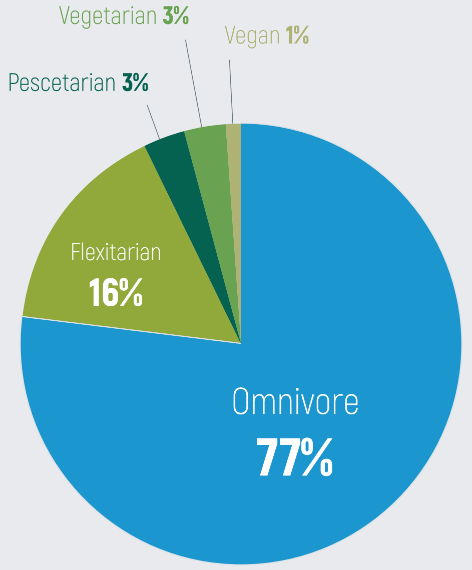
The amount of consumers on the lookout for plant-based alternatives for the animal products they have become accustomed to is growing rapidly. And so is the plant-based food market. By 2026, the revenue generated from plant milk is estimated to hit $21 Billion – growing 75 % from an estimated $12 Billion in 2019 [1]. For plant-based meat alternatives, market researchers estimate the market value to almost triple from $11 Billion in 2019 to $30 Billion in 2026 [2].

The first section of this two part study, a qualitative deep-dive into consumer and expert opinions on plant-based foods, previously shed some light on this consumer group. (See also: PLANT-BASED FOR THE FUTURE Insights on European consumer and expert opinions, a white-paper published by University of Hohenheim and Partners, 2020).

EUROPEAN CONSUMERS: FLEXITARIAN BY GROCERY LIST BUT NOT BY DEFINITION

This development is not only driven by vegans or vegetarians. Rather, it is driven by a highly diverse customer group that actively reduces animal products without omitting them completely from their diet: flexitarians.

Whilst it is traceable that the amount of consumers actively seeking to reduce their consumption of animal products is growing, many do not identify with the term flexitarian. In all countries surveyed, the majority (77%) of participants consider themselves omnivore and only 16% identify themselves as flexitarians. However, 48% stated that they are consuming plant based dairy products, which is triple the amount of self-identified flexitarians. The label 'flexitarian' was most popular with the Germans (25% of participants identified as flexitarian) and the French (18% of participants).



Overall, the label 'flexitarian' has only been adopted by 16% of the participants. Most consider themselves omnivore, even if they consume plant-based products.

Based on 4867 participants.

Sample size: 4867 including participants who are not interested in increasing their plant-based consumption.

[1] Global Market Insight, Report ID: GMI3137, published February 2019. Last accessed 03/2021. https://www.gminsights.com/industry-analysis/plant-based-ingredients-market

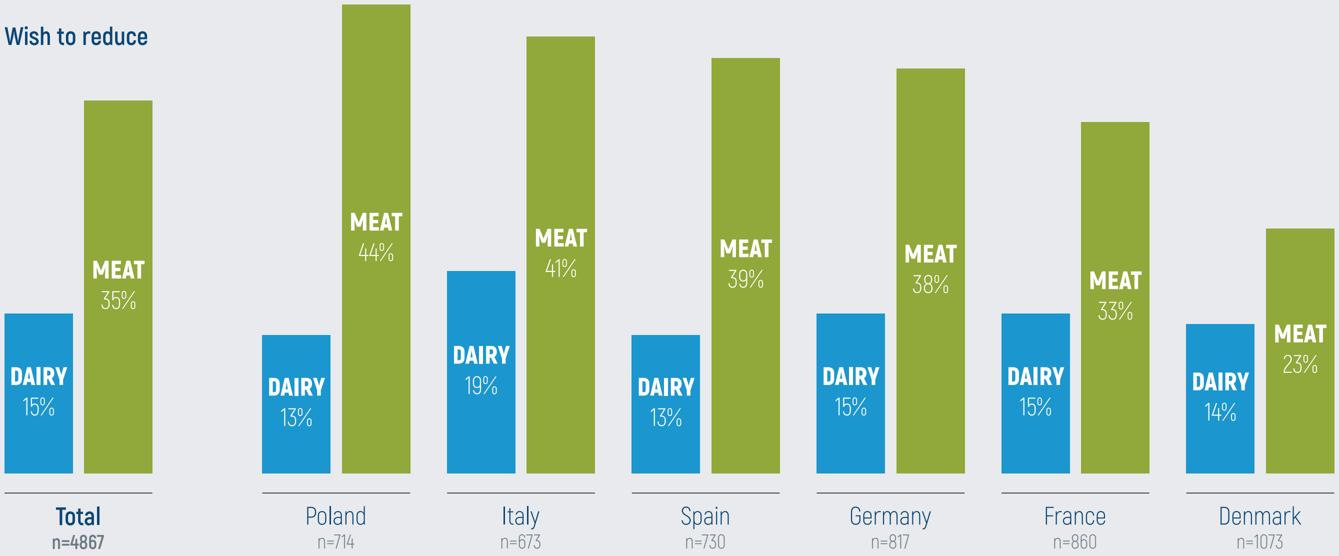
[2] Statista, Forecasted market value of plant-based meat worldwide from 2019 to 2027 (in billion U.S. dollars). Last accessed 03/2021. https://www.statista.com/statistics/877369/global-meat-substitutes-market-value/

CONSUMERS OF PLANT-BASED DAIRY AND MEAT PRODUCTS

INTENTION TO REDUCE MEAT IS HIGHER THAN TO REDUCE DAIRY

The wish to reduce certain animal food groups is present among many – albeit not equally applicable for different food types. Overall, the study found that more participants intend to reduce meat products than dairy (35% vs. 15%). The most committed about reducing their dairy intake are the Italians (19%), the Germans, and the French (both 15%). While the highest intention to reduce meat was detected in Poland (44%) and Italy (41%).

Interestingly, more than half of those who have voiced the intention to reduce their consumption of dairy consider themselves omnivore (56%), while only a quarter of them adopt the term flexitarian (27%). The situation is similar for those who want to reduce eating meat: 61% call themselves omnivores and only 28% identify as flexitarian.



Overall, reducinge one's meat consumption is of higher interest than reducing dairy products.

Based on 4867 participants

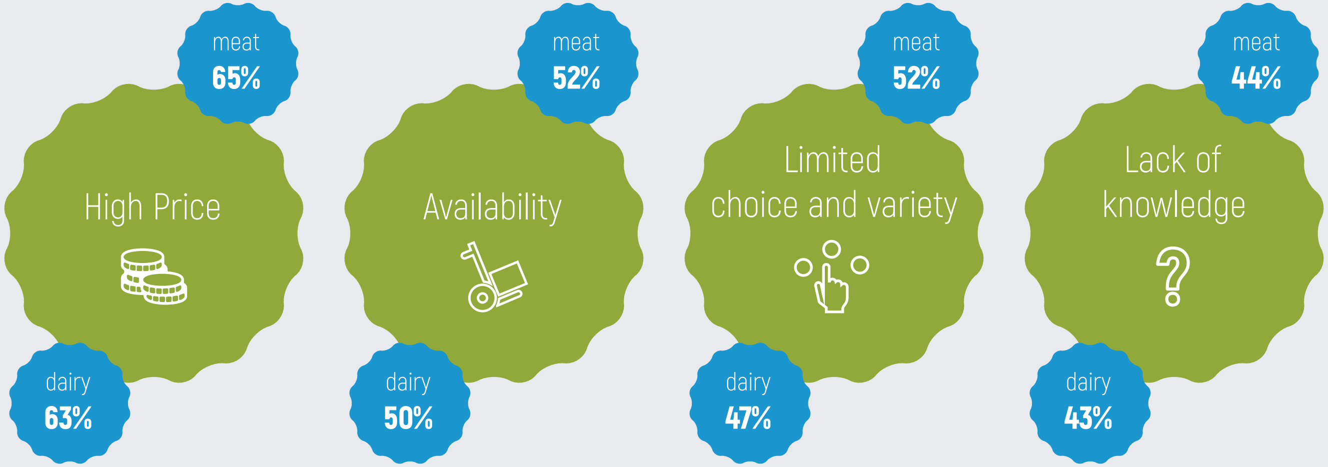
Sample size: 4867 including participants who are not interested in increasing their plant-based consumption.

PLANT-BASED DAIRY AND MEAT PRODUCTS: COMMON CONSUMER BARRIERS

PLANT-BASED MEAT AND DAIRY: PRICE AND AVAILABILITY LIMIT SALES, CONSUMERS SAY

Despite a growing demand for plant-based dairy and meat products, there is still potential for growth. Looking into common barriers that keep consumers from buying these products more frequently, many report high prices (dairy 63%, meat 65%) and availability; with more than half stating they would buy more but feel limited by availability of products (dairy 50%, meat 52%). Other challenges include limited choice and variety (dairy 47%, meat 52%) and even lack of knowledge about nutrients and ingredients of the products at all (dairy 43%, meat 44%).

These common barriers are consistent between the countries surveyed.



Common barriers that keep consumers from opting more often for plant-based meat and dairy products.

Sample size meat results: 2740 Sample size dairy results: 2896

CONSUMERS OF PLANT-BASED DAIRY AND MEAT PRODUCTS

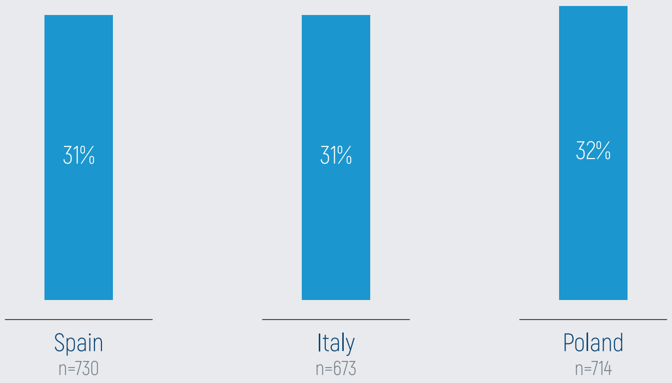
MORE CONSUMERS WANT TO REDUCE MEAT CONSUMPTION THAN MILK CONSUMPTION

Overall, 25% of surveyed consumers voiced their intent to add more plant-based meat products to their meals. Leading the field are Spain, Italy and Poland, where almost a third of consumers want to increase their consumption of meat alternatives. When it comes to dairy, consumers seem slightly more reluctant to change their eating habits. Overall, only 25% intend to increase the amount of plant-based dairy on their shopping lists. Again, Poland (34%), Spain (30%), Italy (31%) are most keen to stock their fridges with plant-based products from the dairy aisle.

When it comes to plant-based meat, one in four consumers intends to increase their consumption of such products in the future. However, these intentions seem to differ between the countries. From all countries surveyed, Spain, Italy and Poland have the highest percentage of consumers who want to increase their consumption of plant-based meat products (Spain 31%, Italy 31%, Poland 32%).

However, those who have not yet acquired a taste for plant-based patties, steaks and sausages, generally don't feel they will be trying these products in the near future. However, Italians (12%) and Polish (11%) report to be slightly more open and may consider venturing into the plant-based meat-aisle more often.

Highest percentages of consumers who want to increase their consumption of plant-based meat products



Sample size: 4867 including participants who are not interested in increasing their plant-based consumption.

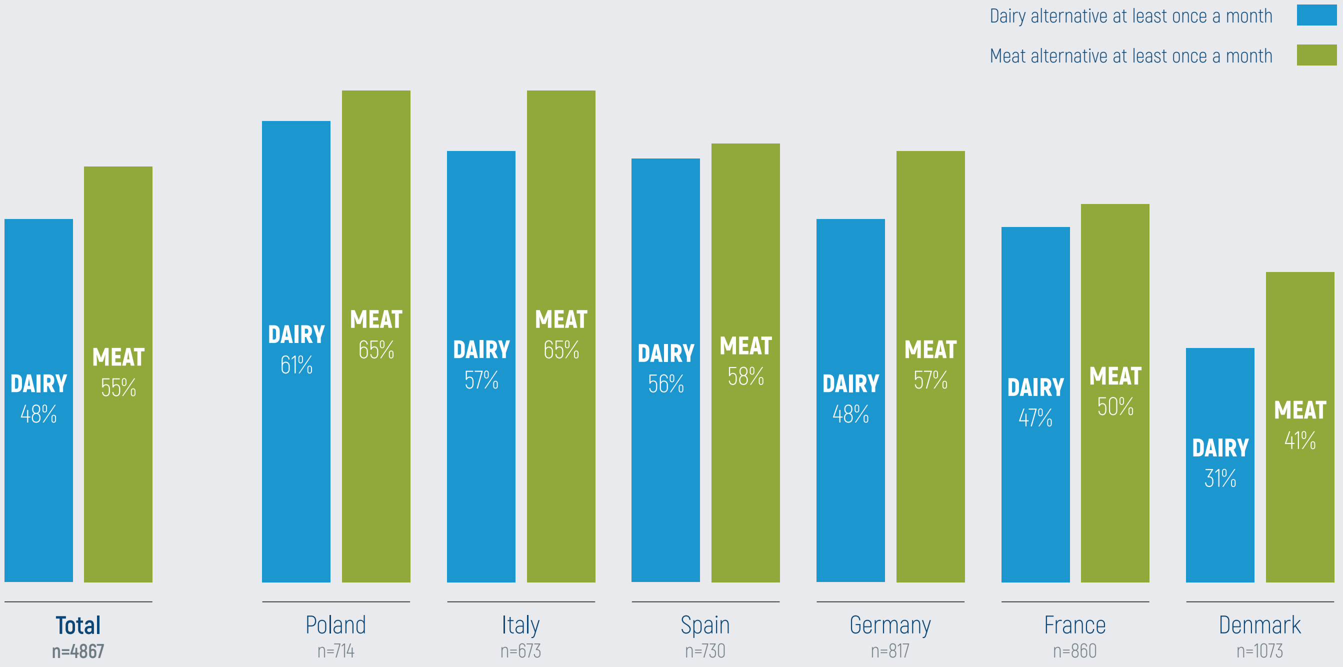
PLANT-BASED DAIRY AND MEAT PRODUCTS: DRIVERS & BARRIERS

CONSUMPTION OF PLANT-BASED DAIRY AND PLANT-BASED MEAT GO HAND IN HAND

Overall, 58% of those surveyed across the countries consume plant-based dairy products at least once a month, and 55% of them consume plant-based meat products at least once a month.

Among the countries sampled; Italy, Poland and Spain have the highest rates of consumers, who opt for plant based meat and dairy at least once a month. Conversely, Denmark has the highest number of consumers that have not consumed plant-based dairy or meat products until now.

Most significantly, consumers that opt for one type of plant-based food tend to opt for other plant-based options from other categories as well. Among all those surveyed, 46% of heavy plant-based dairy users are also frequent plant-based meat users, while 86% non-users of plant-based dairy also choose not to consume plant-based meat.



Italy & Poland have the highest percentage of people who consume plant-based meat products at least once a month, whereas Denmark has the highest share of consumers who never consume these products.

Results are based on 4867 participants.

Sample size: 4867 including participants who are not interested in increasing their plant-based consumption; and 2198 participants who do not consume plant-based meat or dairy.

PLANT-BASED DAIRY AND MEAT PRODUCTS DRIVERS & BARRIERS

CONSUMERS PREFER TO SHOP AT SUPERMARKETS FOR PLANT-BASED PRODUCTS

Plant-based options are more and more widely available, with even mainstream supermarkets and discount supermarkets carrying multiple brands of plant-based dairy and meat items. Experts theorised that plant-based brands would benefit from being listed in the stores consumers have grown accustomed to, as it makes the choosing of plant-based products more convenient and easy for consumers.

The present study supports this theory. Especially for future users, product availability in regular supermarkets and discount supermarkets is vital.

Overall, consumers reported that the places they most often shop for plant-based dairy are supermarkets (66%) and discount supermarkets (43%). The overall least frequented options were farmer's markets (10%) and online grocery delivery services (10%). Compared to other shopping profiles, those consumers who purchase the most plant-based dairy items are more likely to shop at organic supermarkets than other consumers.

Similarly, consumers prefer to shop at supermarkets (60%) and discount supermarkets (42%) when it comes to meat alternatives. French consumers lean more towards organic supermarkets as their second most preferred location to shop for plant-based meat products.

MEAT ALTERNATIVES:

60% Supermarket
42% Discount supermarket

DAIRY ALTERNATIVES:

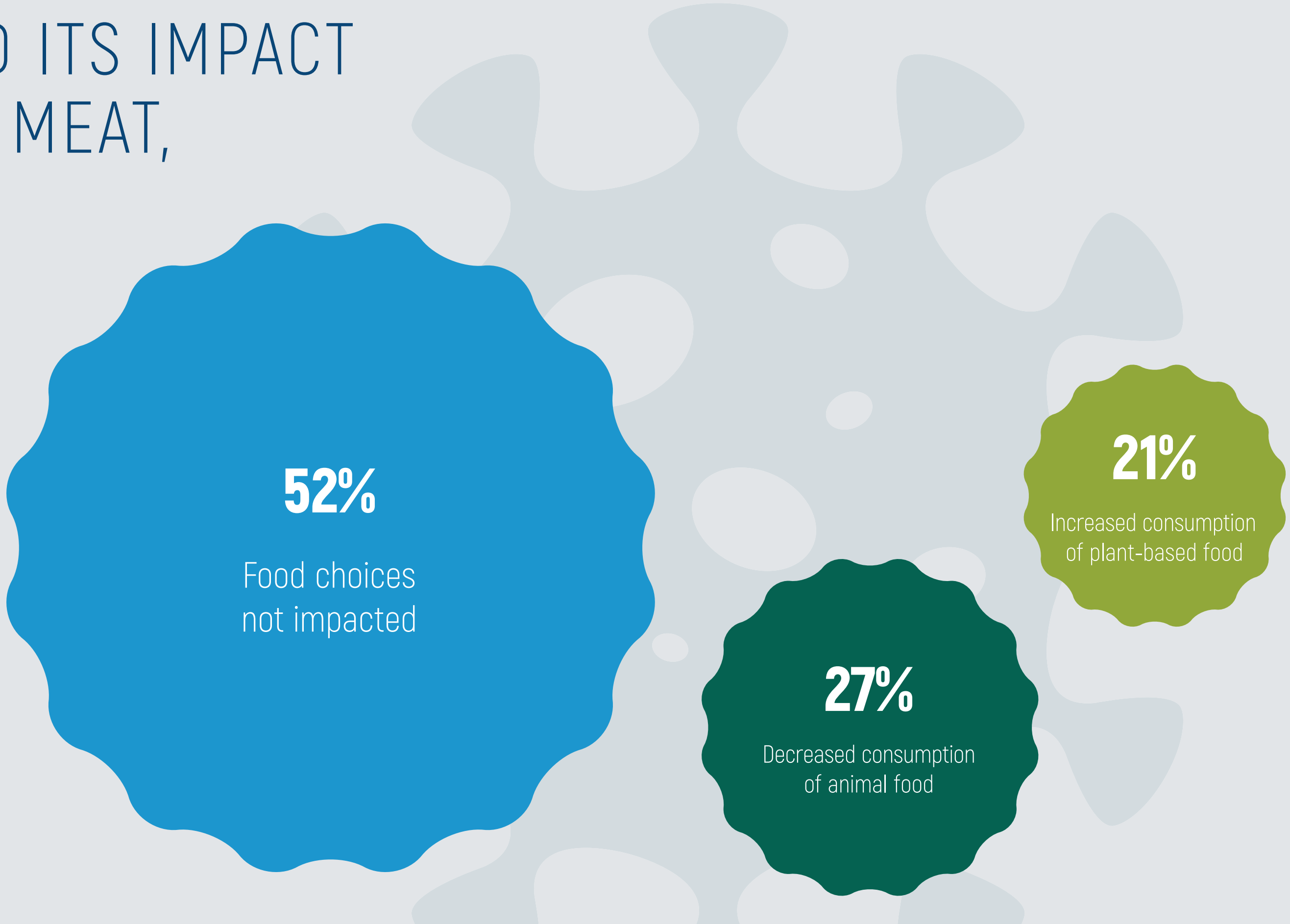
66% Supermarket
43% Discount supermarket

Sample size meat results: 2600   Sample size dairy results: 2789

A GLOBAL PANDEMIC AND ITS IMPACT ON FOOD CHOICES: LESS MEAT, MORE PLANT-BASED

What has COVID-19 to do with all of this? During the COVID-19 pandemic, the daily lives of millions were altered significantly. The pandemic's impact affected supply chains of all sorts of goods on a global scale, including food items. Additionally, media coverage of food safety issues and closed restaurants is likely to have shaped the daily food choices of consumers worldwide.

Most of those surveyed reported their food choices were not impacted by the COVID-19 pandemic (52%). However, 27% reported that they ate less animal derived food products and 21% reported an increased consumption of plant-based food products.



How the pandemic affected consumer food choices.

Sample size: 3086 including participants who are not interested in increasing their plant-based consumption; and 2198 participants who do not consume plant-based meat or dairy.

PLANT-BASED DAIRY

INSIGHTS ON THE CONSUMPTION OF DAIRY ALTERNATIVES IN EUROPE

The amount of plant-based dairy alternatives on the market is growing massively. In 2019 alone, the global demand for plant-based milk was estimated at more than $12 billion with a forecast to attain more than 11% compound annual growth up to 2026.

Oats, soybeans, rice, almonds and coconuts are just a few of the basic ingredients that manufacturers use to recreate and reinvent accustomed product categories like milk, cheese, ice cream and yoghurt.

During the purchasing process, several factors have an influence upon a consumer's decision for or against a certain product. Good taste, resemblant texture and attractive packaging might be some of the more obvious factors that attract consumers. Furthermore, media reports on the harmful effects of animal agriculture on climate change and pollution, and increasing concerns about animal welfare, also factor into the directing of consumers away from animal products and towards plant-based alternatives.

PLANT-BASED DAIRY

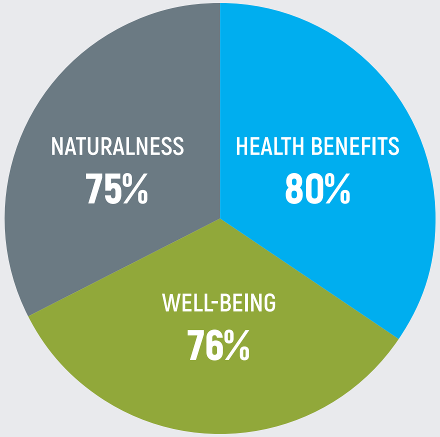
HEALTH BENEFITS AND WELL-BEING DRIVE THE DEMAND FOR PLANT-BASED DAIRY

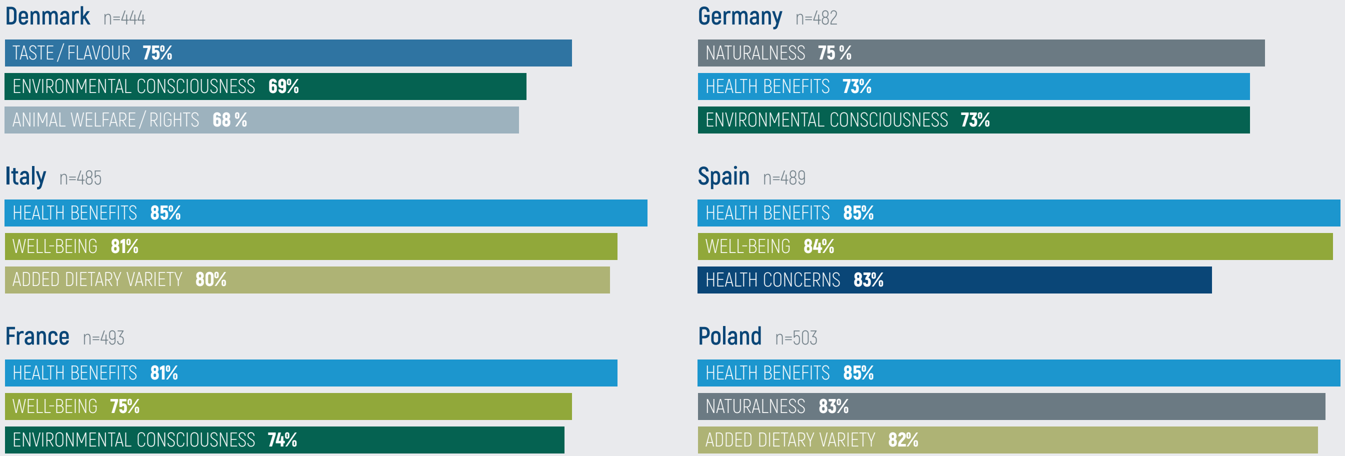
In fact, the main drivers for consumers to opt for plant-based products are health benefits (80%), benefits for their well-being (76%) and the perceived naturalness of the products (75%)

Interestingly, environmental consciousness and animal welfare were not the primary drivers mentioned, though ranging between 74% and 70%, respectively, these were still important motivators to go for plant-based products for many consumers.

However, the drivers mentioned most by the countries were dominated by health and well-being. Here are the most important reasons to choose plant-based dairy options named by the different countries surveyed:

Main drivers for consumers to choose plant-based dairy products





Sample size: 2896

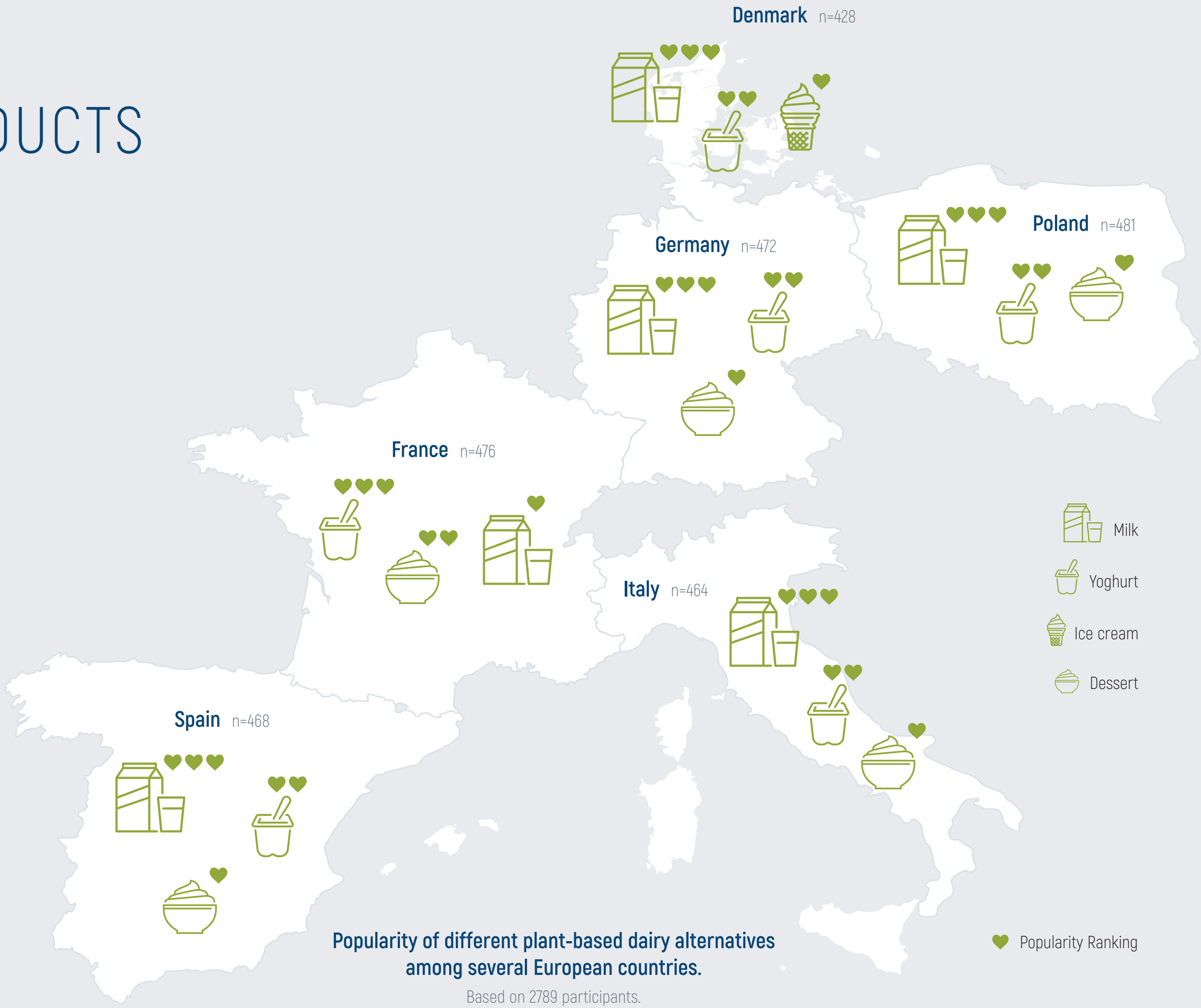
PLANT-BASED DAIRY PRODUCTS

PLANT-BASED DAIRY MORE ACCEPTED THAN EVER

With a growing variety of products, these days almost no wish for plant-based dairy products remains unfulfilled. Whether a consumer is looking for a creamy, barista-quality milk alternative, a fruity yoghurt dessert, or a indulgent ice-cream treat, more and more supermarkets all over Europe are able to provide for their cravings.

When asked for their favourite products,, milk was the most popular item on the plant-based dairy menu, with 75% of consumers opting for plant-based drinks at least once a month, and 45% at least once a week. The runner-up on the popularity-scale is yoghurt, being consumed by 69% at least once a month and 37% at least once a week. A strong third place goes to dessert: 64% consume plant-based desserts at least once a month, 34% at least once a week.

Figures based on 2789 participants.



Popularity of different plant-based dairy alternatives among several European countries.

Based on 2789 participants.

PLANT-BASED MEAT

INSIGHTS ON THE CONSUMPTION OF MEAT ALTERNATIVES IN EUROPE

Until recent years, meatless substitutes didn't have the best reputation. The most common product in the western world was tofu, a rather colourless and tasteless product, when unseasoned. On top of that, it was mostly hidden in organic supermarkets and specialty stores, out of plain sight for most consumers.

The plant-based meat arena has changed a lot since then. Today, ground 'meat', chicken-less chicken tenders, burgers, sausages, schnitzel and more have made their way into regular supermarkets. Restaurants, fast food chains and the food service industry have picked up on the development as well, continuously adding plant-based options to their menus to cater the growing demand.

Valued at €4.4 billion in 2019, the European market for plant-based meat alternatives is expected to grow rapidly to €7.5 billion by 2025 – an in increase of over 70% in just six years [1].

[1] ING Research – Growth of meat and dairy alternatives is stirring up the European food industry – October 2020. Last accessed June 2021. https://think.ing.com/uploads/reports/ING_report_-_Growth_of_meat_and_dairy_alternatives_is_stirring_up_the_European_food_industry.pdf

PLANT-BASED MEAT PRODUCTS

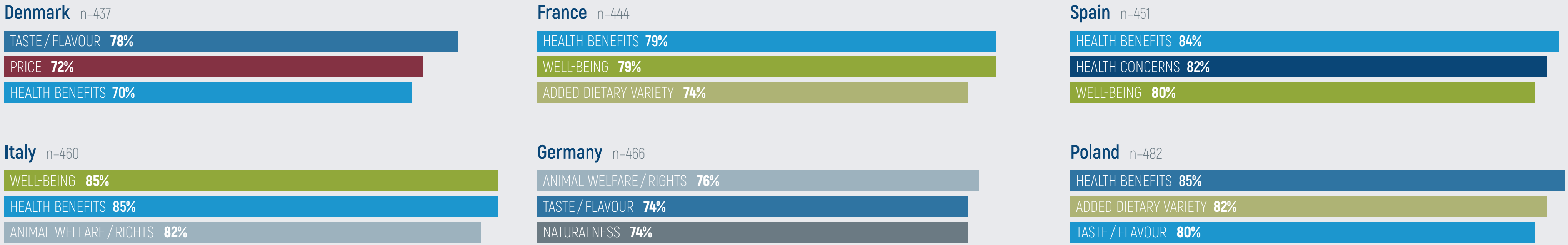
INSIGHTS ON THE CONSUMPTION OF MEAT ALTERNATIVES IN EUROPE

The grapid growth in the market has been driven by consumers who have become more interested in plant-based meat alternatives. While their demand is growing at an increasing pace, one might wonder what reasoning is behind the decision to opt for the veggie burger instead of the one made from beef.

According to the presented survey, the overall most important drivers to choose plant-based meat options are health benefits (79%), flavour experience (77%) and benefits for well-being (75%). In contrast to the rationale of purchasing plant-based dairy, animal welfare and environmental consciousness were strong drivers as well (74% and 72% respectively).

Diving deeper into what drives consumers of the different countries surveyed, health benefits and well-being are the dominant reasons for Italian, Spanish, French and Polish consumers opting for plant-based meat alternatives. The Germans, on the other side, are most driven by animal welfare and animal rights. Another large majority of Germans is attracted by novel flavours – so are most of the Danish consumers that chose plant-based meat alternatives.

Top choices for the countries:



Main drivers: why European consumers opt for plant-based meat alternatives.

Based on 2740 participants.

Sample Size entire page 2740

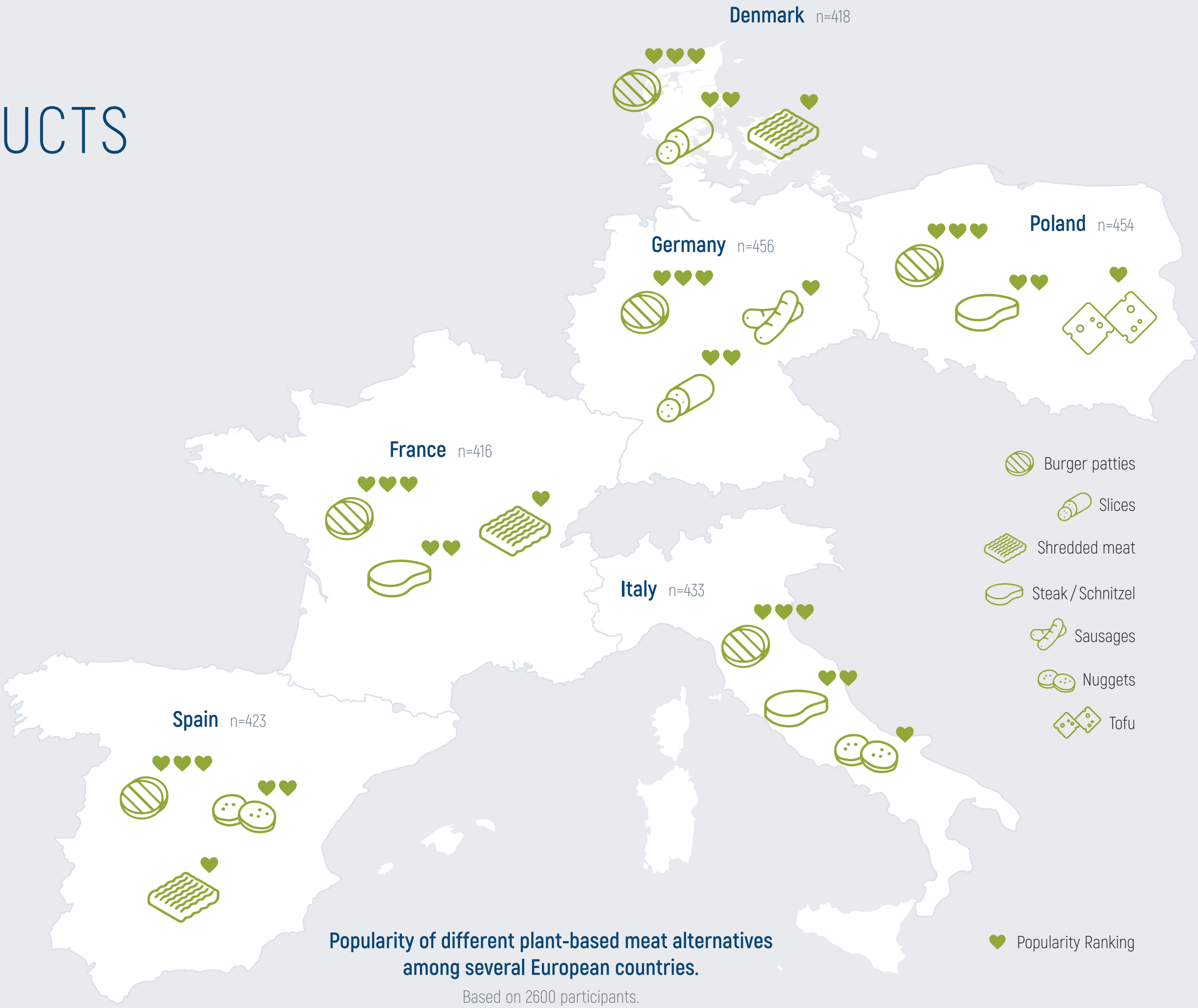
PLANT-BASED MEAT PRODUCTS

THE MOST POPULAR PLANT-BASED MEAT ALTERNATIVES

With more product variety, availability and improved recipes, plant-based meat alternatives have become more accepted among the general population. Similarly, more and more people learn about the products' benefits and switch more and more often to plant-based alternatives. Overall, more than half of the surveyed consumers purchase and eat plant-based sausage, burgers, mince, and the like. 42% do so at least once a month, 24% at least once a week.

Among all options, burger patties are the most popular item amongst those who regularly consume them or are interested in trying them. 66% of these consumers eat meat-free burger patties at least once a month and 29% even at least once a week. On the preference scale, burger patties are closely followed by plant-based steak and schnitzel (consumed by 60% at least once a month and 25% at least once a week), and slices / cold cuts (consumed by 58% at least once a month and 27% at least once a week).

The classics like tofu, tempeh and seitan are less popular with tempeh being the least popular among the given options (consumed by 34% at least once a month and 16% at least once a week).



Popularity of different plant-based meat alternatives among several European countries.

Based on 2600 participants.

ROOM FOR IMPROVEMENT: GROWTH AREAS FOR PLANT-BASED DAIRY PRODUCTS

As demonstrated, a growing number of consumers are keen on adding more plant-based meat and dairy products to their grocery lists more often. Companies react to this demand by launching more and more products into this growing market segment. Between 2017 and 2018, for instance, the amount of plant-based products launched doubled, whereas between 2013 and 2018 this figure had increased by 175%, hinting at the steep growth rates seen in recent years.

In order for companies to decide which new products to focus their energy and resources on, it is useful to check in with consumers and their actual needs and wants.

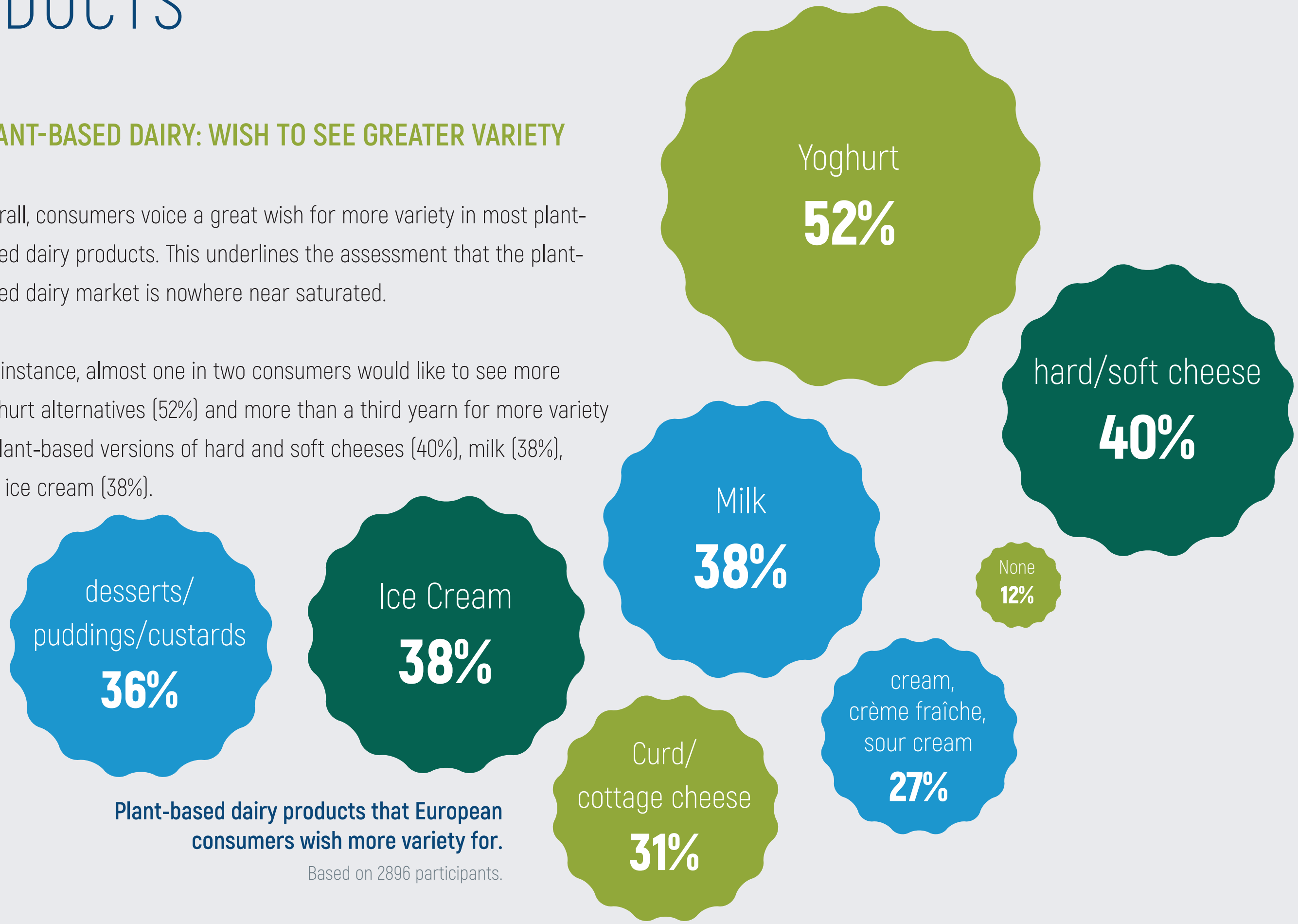
WHAT PRODUCTS AND ASPECTS SHOULD COMPANIES FOCUS ON TO IMPROVE AND GROW THEIR PORTFOLIOS?

Let's have a look at dairy products first.Product variety, taste, flavour and mouthfeel, as well as nutritional content, are areas to take a closer look at.

PLANT-BASED DAIRY: WISH TO SEE GREATER VARIETY

Overall, consumers voice a great wish for more variety in most plant-based dairy products. This underlines the assessment that the plant-based dairy market is nowhere near saturated.

For instance, almost one in two consumers would like to see more yoghurt alternatives (52%) and more than a third yearn for more variety in plant-based versions of hard and soft cheeses (40%), milk (38%), and ice cream (38%).



Plant-based dairy products that European consumers wish more variety for.

Based on 2896 participants.

ROOM FOR IMPROVEMENT: GROWTH AREAS FOR PLANT-BASED PRODUCTS

OPINIONS DIFFER ABOUT TASTE AND FLAVOUR – BUT NOT WHEN IT COMES TO MOUTHFEEL

When it comes to a product's flavour experience, most consumers prefer a taste similar to their familiar animal products (45%). Especially those consumers interested in consuming plant-based dairy products in the future prefer familiar taste experiences over new flavours. However, a considerable number of consumers is more inclined towards new and alternative taste experiences (37%).

At the same time, mouthfeel seems to be an overall more crucial factor. Every other consumer asks for a similar mouthfeel to the conventional product (50%) and 35% even request the mouthfeel to be exactly the same. Similarly to taste, future plant-based dairy users wish more intensely for a similar mouthfeel. On the other hand, only 30% of consumers stated that they are open to new and alternative experiences.

RECIPES WITH LESS SUGAR AND FAT ARE IN HIGH DEMAND

Not only variety, flavour and mouthfeel are crucial to choosing a product. Consumers are becoming more informed and many check a product's ingredients list before tossing it into the shopping cart.

Their preferences and requests are clear. One in two consumers wish for plant-based dairy products with a lower sugar content (50%) and almost as many (45%) look for products with lower fat content. Other requested improvements are lower overall calories (40%) and fortifications (40%), such as Vitamin B12 and Vitamin D.

While most countries expressed quite similar wishes, fortifications seem more important to Polish consumers than any other consumer group (52% wish for fortifications).

Based on 2896 participants.

ROOM FOR IMPROVEMENT: GROWTH AREAS FOR PLANT-BASED MEAT PRODUCTS

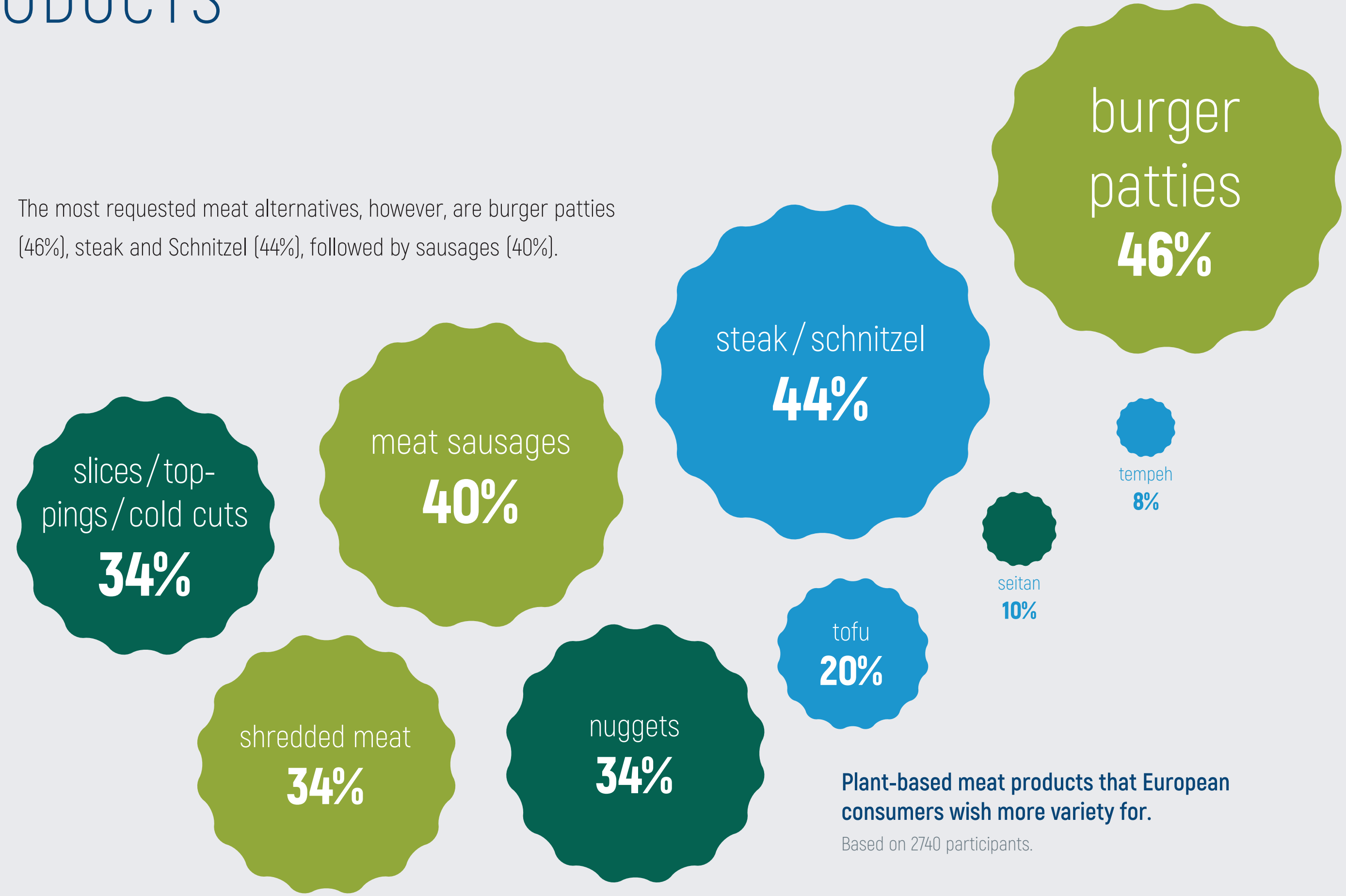
PLANT-BASED MEAT: VARIETY, VARIETY, VARIETY

Plant-based meat alternatives are becoming a more popular option to add protein, vegetables or simply variety to one's diet.

As seen before, many European consumers intend to increase their intake of plant-based meat alternatives.

To make products more appealing, companies producing such alternatives would be wise to add more variety into their portfolios. Consumers ask for more product variety for virtually all items on the plant-based meat market.

The most requested meat alternatives, however, are burger patties (46%), steak and Schnitzel (44%), followed by sausages (40%).



Plant-based meat products that European consumers wish more variety for.

Based on 2740 participants.

ROOM FOR IMPROVEMENT: GROWTH AREAS FOR PLANT-BASED MEAT PRODUCTS

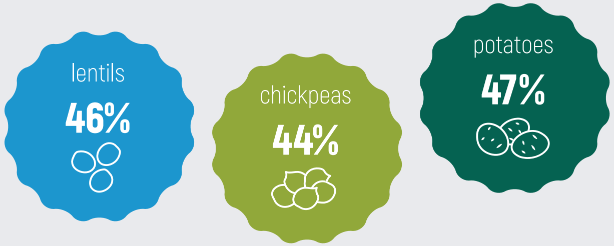
RECIPES: WHICH INGREDIENTS TO FOCUS ON

Historically, soybeans have played a prominent part in plant-based meat alternatives, but in recent times they have had to step aside and share the spotlight with other ingredients, such as peas, lupines, and grains.

When asked for their preferred main ingredient in plant-based meat alternatives, consumers say potatoes (47%), lentils (46%), and chickpeas (44%).

Interestingly, palates and preferences differ between the countries: while in Denmark and Spain chickpeas lead the wish list, Italy, Germany and France are crazy about potatoes. In Poland, lentils win the race for the most popular ingredient.

Overall preferred ingredients:



Favourite ingredients: European consumers wish to see more plant-based meat products based on different ingredients.

Based on 2740 participants.

ROOM FOR IMPROVEMENT: GROWTH AREAS FOR PLANT-BASED MEAT PRODUCTS

TASTE AND TEXTURE: WHAT'S CRUCIAL FOR A POSITIVE CONSUMER EXPERIENCE

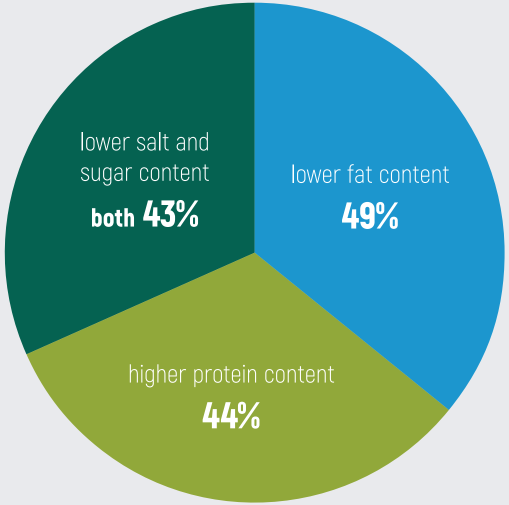
Similarly to plant-based dairy products, texture is where consumers tend to be less flexible with their preferences. A meat alternative's texture should therefore provide a very similar texture as the conventional product. With taste, consumers are relatively more accepting towards novel flavour experiences.

43% of consumers prefer flavours that resemble the meat-based equivalent, while 32% prefer new taste experiences. Tendentially, future plant-based meat users would prefer a similar taste to the conventional product.

When it comes to mouthfeel and a product's haptic, more consumers (46%) voice a preference towards similar experiences, compared to the conventional product. 35% even state that the plant-based alternative should ideally feel exactly the same. Similarly to taste, future plant-based meat users are even more keen on a similar mouthfeel compared to conventional products rather than novel experiences.

NUTRITIONAL CONTENT: RECIPES NEED TWEAKING

A common misunderstanding around plant-based products is that they contain more chemicals and artificial ingredients than conventional products. So when consumers were asked as to how companies may improve their products' recipes and nutritional content; most wished for lower fat content tweaks (49%), and many wished for a higher protein content (44%). A considerable number of consumers also prefer recipes with lower salt and sugar content (both 43%). In Poland, consumers also look for fortified products. 54% request plant-based meat alternatives with added Vitamin B12 and D.



How to tweak recipes: changes consumers would like to see.
Based on 2740 participants.

COMMUNICATION: INFORMATION SOURCES AND FORMATS

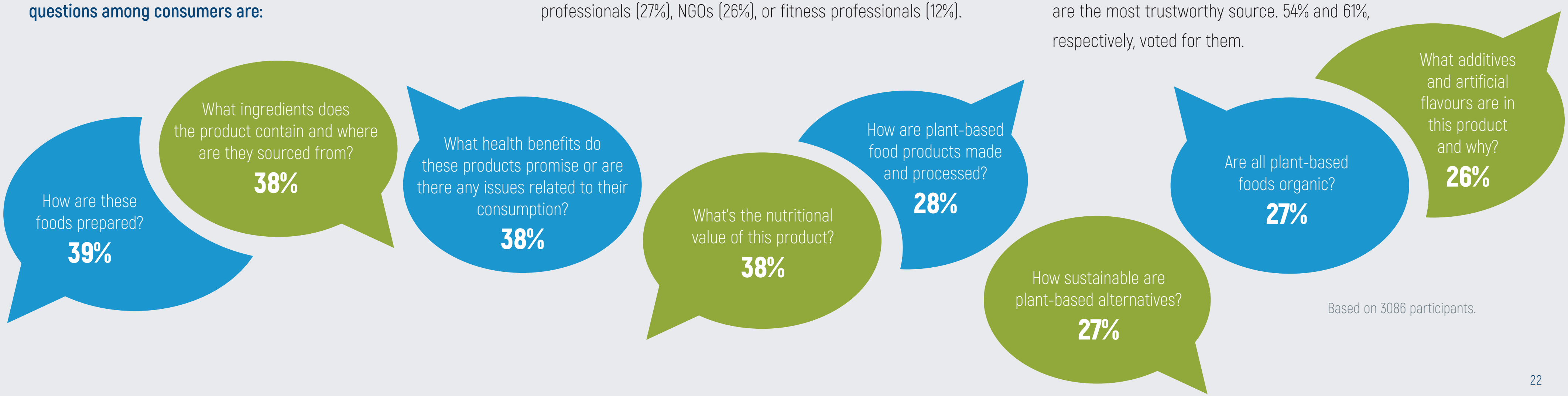
MAKING INFORMED DECISIONS: WHERE CONSUMERS TURN TO

It has never been easier to retrieve all sorts of information in a matter of moments. However, not all sources of information are created equal. Which is trustworthy? Where do consumers seek reliable information on plant-based foods?

According to this survey, consumers indeed have questions concerning plant-based foods. Among the most frequently wondered about questions among consumers are:

With these and more questions in mind, consumers look for answers. When asked who they consider the most reliable source for information, most consumers lean towards professionals: most mentioned were dieticians (43%), medical health professionals (37%), and scientists / research centres (34%). The most trusted source right after professionals? Surprisingly, family and friends were mentioned by 29%, and were thus overall considered more trustworthy than culinary professionals (27%), NGOs (26%), or fitness professionals (12%).

However, who consumers trust most when it comes to plant-based food differs from country to country. For instance, in Denmark public and governmental organisations play a bigger role - 39% of surveyed consumers trust them most. Meanwhile, 45% of Italians and 42% of French trust health professionals the most. While 36% of Germans bestow most of their trust in independent consumer organisations, in Spain and Poland consumers agree that nutritional professionals are the most trustworthy source. 54% and 61%, respectively, voted for them.



Based on 3086 participants.

COMMUNICATION: INFORMATION SOURCES AND FORMATS

PRODUCT TESTS AND LABELS ARE KEY FOR COMMUNICATIONS

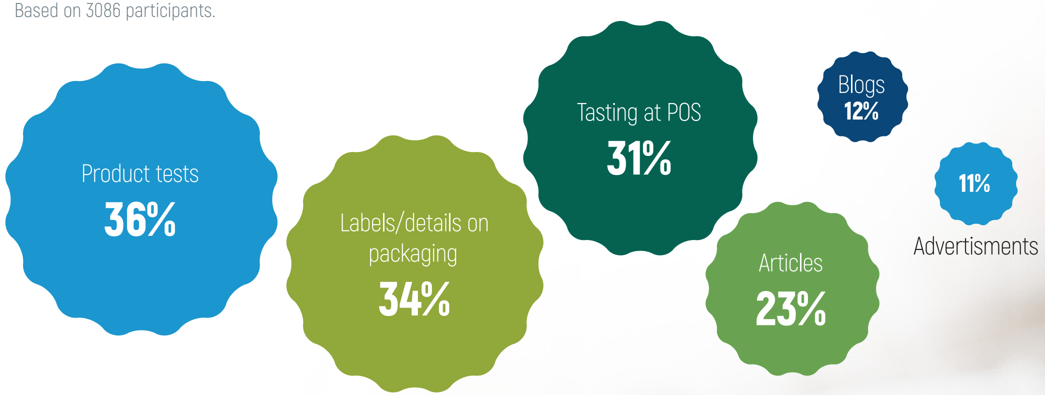
In order to make an informed decision for or against a plant-based product, consumers will look for information before a purchase. Not all sources of information are regarded equally and consumers have distinct preferences on where they like getting insights from. Overall, 36% of consumers like product tests the most. Informative labels and details on nutrients on the packaging are also strongly preferred by 34%. Tasting the product themselves at the point of sale was another favoured format – 31% of consumers prefer to experience the food themselves first. Other formats such as short articles (23%), blogs (12%) and advertisements (11%) were considered less favourable.

Interestingly, there seems to be a preference gradient between the countries. While the central / northern European countries Germany, Denmark and Poland strongly favour product tests as their favourite source of information, southern European countries like Italy and Spain prefer informative labels and packaging the most.

On the other hand, where consumers get information from the most is relatively similar across the countries. The world wide web was mentioned as the overall most important source to get information (64%), followed by TV (27%), personal conversations (27%), and social media (26%).

Preferred sources of information

Based on 3086 participants.



THE FUTURE IS PLANT-BASED

A quantitative study funded by EIT Food and conducted by

Contact
Dr. René Nachtsheim
Senior Project Manager Sensory & Consumer Science, Döhler
Rene.Nachtsheim@doehler.com

Contact
Klaus Hadwiger
University of Hohenheim, Hohenheim Research Center for Bioeconomy (Activity Leader)
Klaus.hadwiger@uni-hohenheim.de

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

With contribution of proveg international

A report created by vegency | united communications GmbH. Issued by University of Hohenheim. Version 1.20210812