BARRIERS AND OPPORTUNITIES FOR THE UPTAKE OF MORE PLANT-BASED DIETS

INSIGHTS FROM THE PLANTPRO PROJECT*

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* based on research by Jessica Aschemann-Witzel and Martje Mulders

AGENDA

- **Status** – how large and widespread is interest in plant-rich diets so far?
- **Segments** – which different segments differing in views & actions are in Denmark?
- **Barriers & opportunities** – how to push the development?

Image: colourbox

DATA FROM PLANTPRO PROJECT

Innovationsfonden

Funded by Innovation Fund Denmark
grant nr 0224-00044B

8.4 mill DKK investment by IFD

Headed by professor Jessica Aschemann-Witzel

See more at https://mgmt.au.dk/plantpro/

April 2021- March 2024

18 partners
MAPP Centre /Aarhus University, Food Science / University of Copenhagen, Copenhagen Business School, Plantebranchen, Dansk Vegetarisk Forening, Simple Feast, Beyond Coffee, Thinktank OneThird, Circular Food Technology, Møllerup Brands, Food Innovation House, Orkla, Naturli, Planteslagterne, Upfield, Eachthing, Rema1000, Fair Trees.

Plant-Rich diets

Reduced food waste

Technology acceptance

PLANTPRO 'BENCHMARK' SURVEY

nnovationsfonden

Aim of Benchmark: survey at the start, middle and end of the project to be able to ***measure progress*** in terms of the objectives of the project.

Data of the Benchmark: Representative Danish consumer sample - 1126 responses

STATUS – HOW LARGE AND WIDESPREAD IS INTEREST IN PLANT-RICH DIETS SO FAR?

DK COMPARED TO EUROPE

According to the EU project SmartProtein:

- ❑ 30% of Europeans identify as ‘flexitarians’ and 7% as ‘plant-based diet’

Share of flexitarians / following a plant-based diet per country:

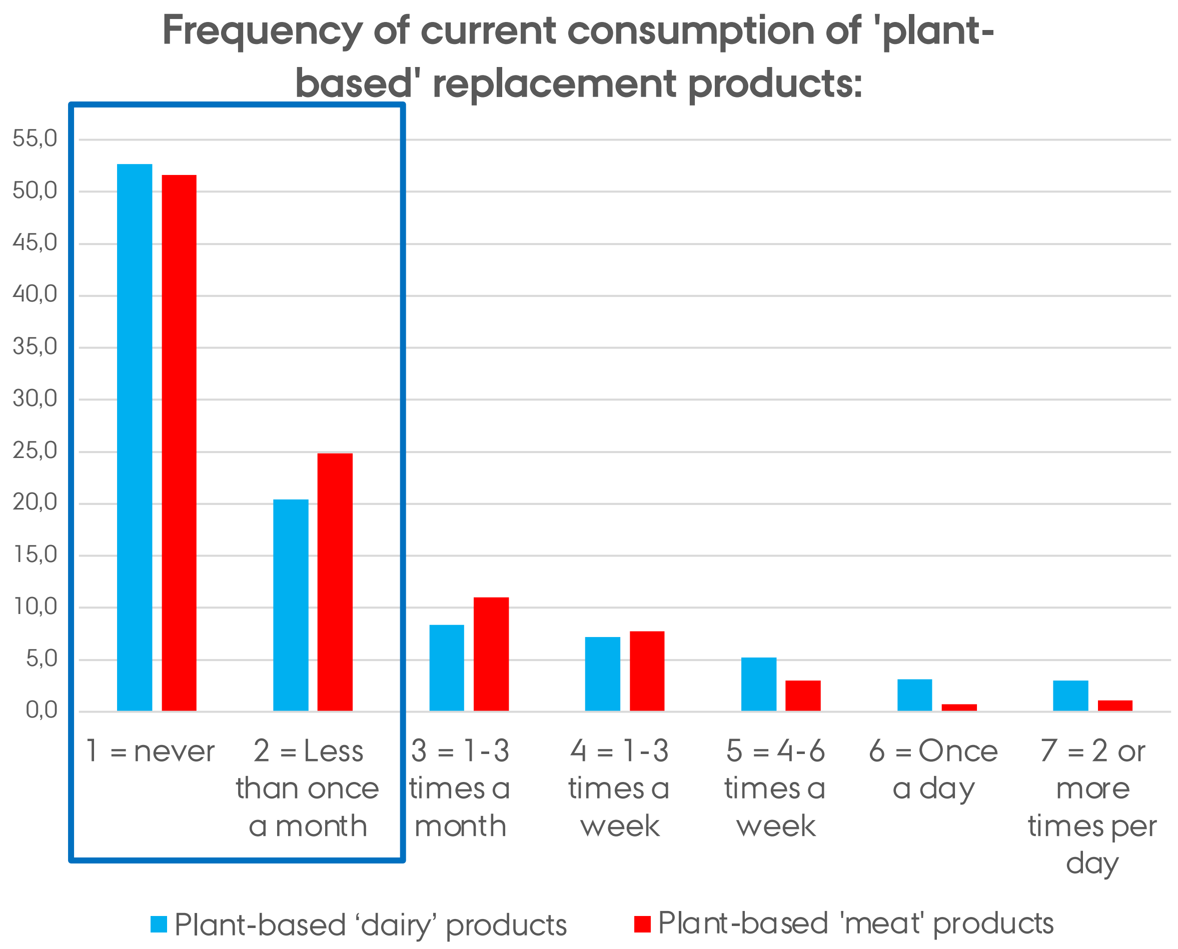
- ❑ Denmark 24% / 9%
- ❑ Germany 30% / 10%
- ❑ Netherlands 42% / 7%
- ❑ UK 23% / 9%

smart protein

www.smartproteinproject.eu

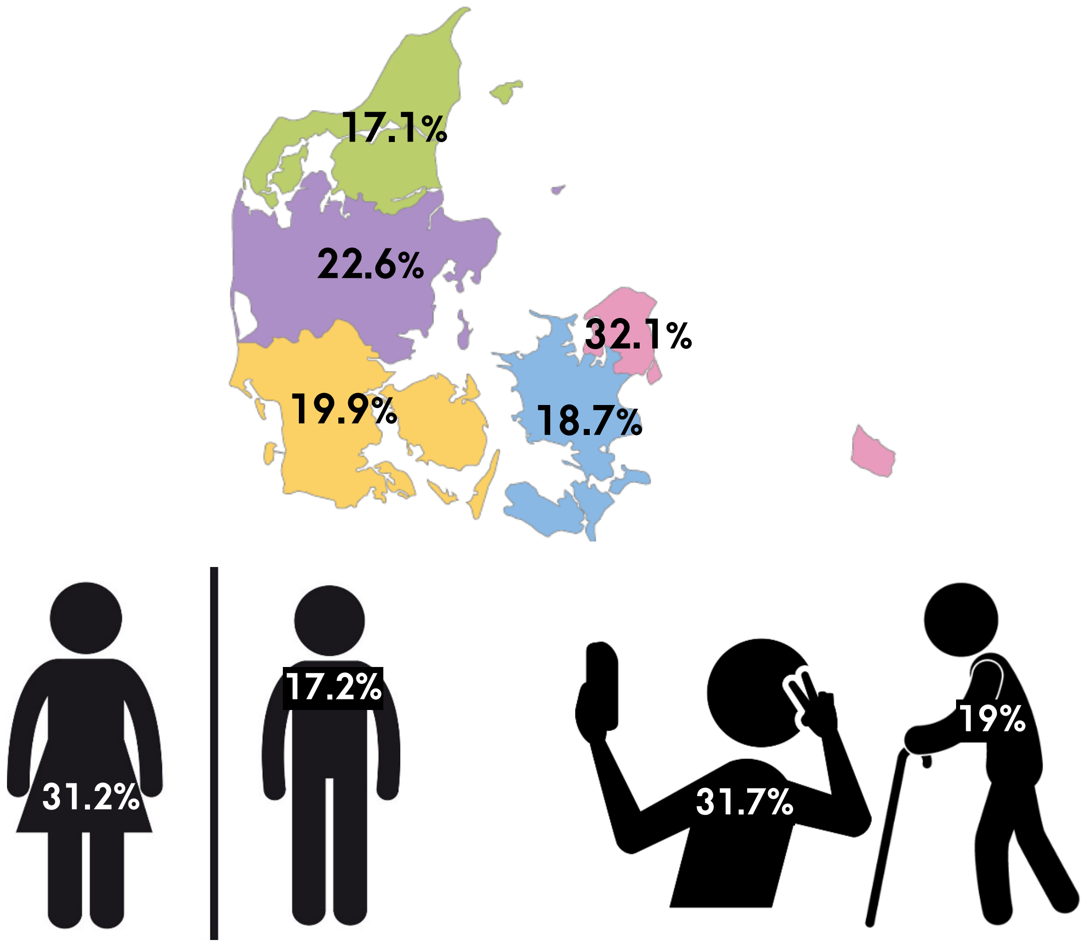
What consumers want:

SELF-PERCEPTION AND CONSUMPTION

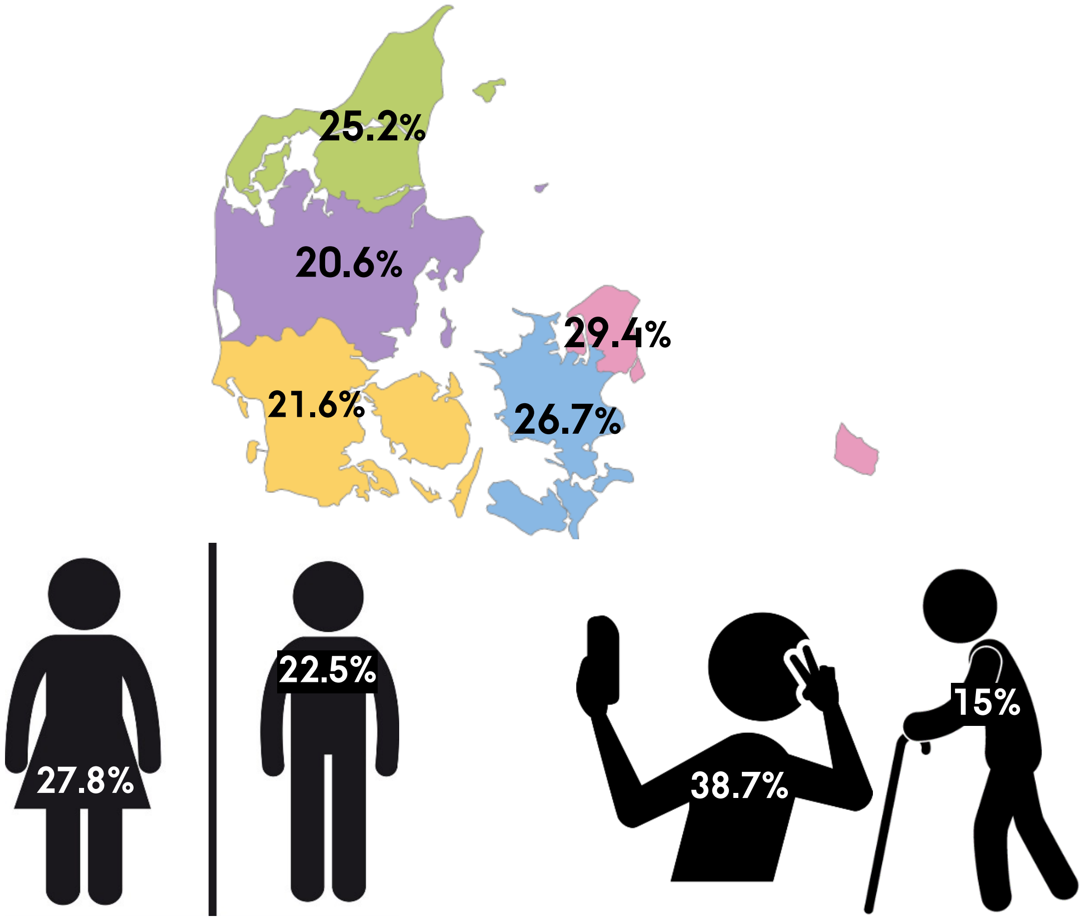


SELF-PERCEPTION AND CONSUMPTION

Non meat-eaters



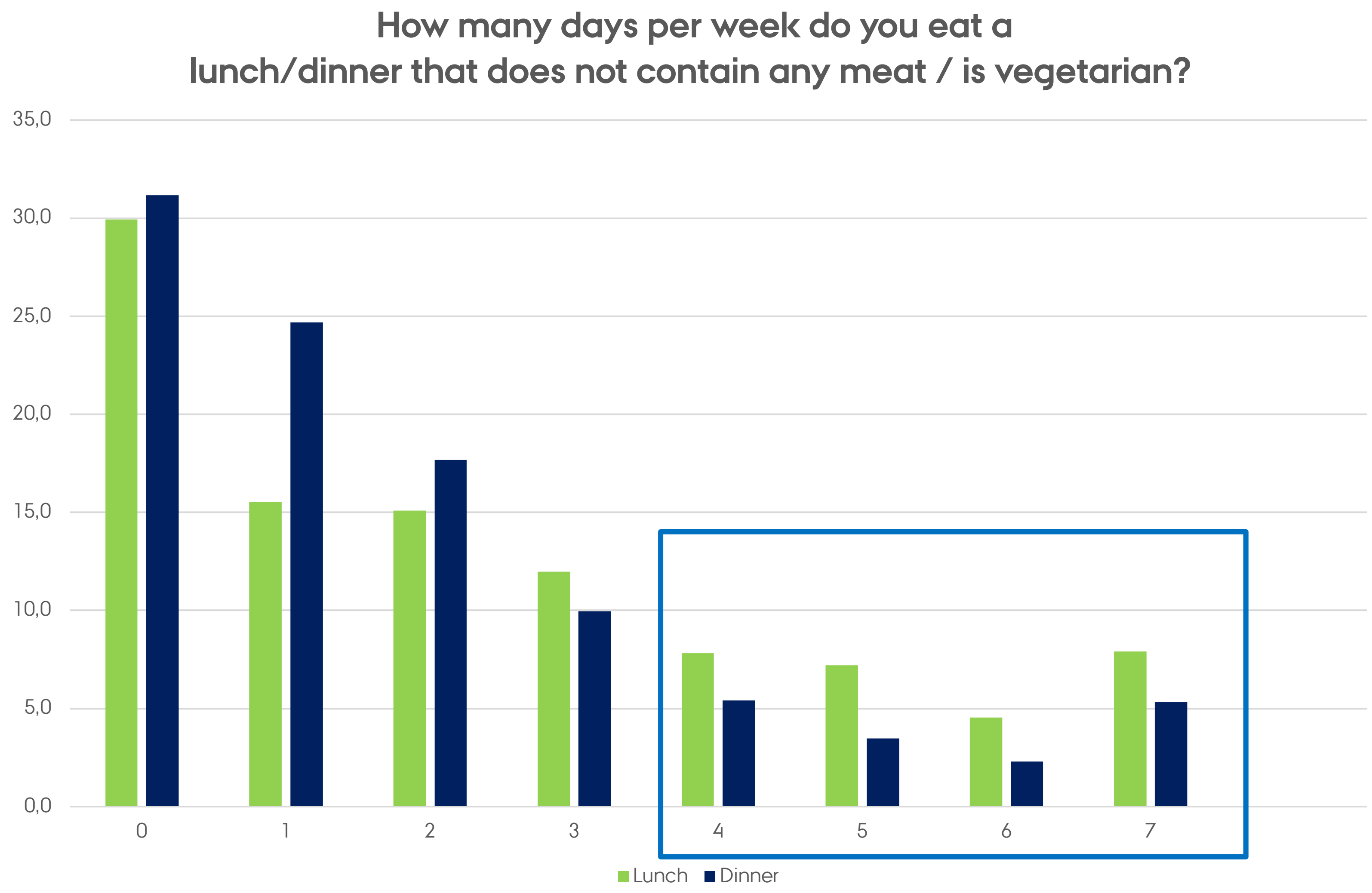
Frequency of current consumption of ‘plant-based’ replacement products: more than once a month



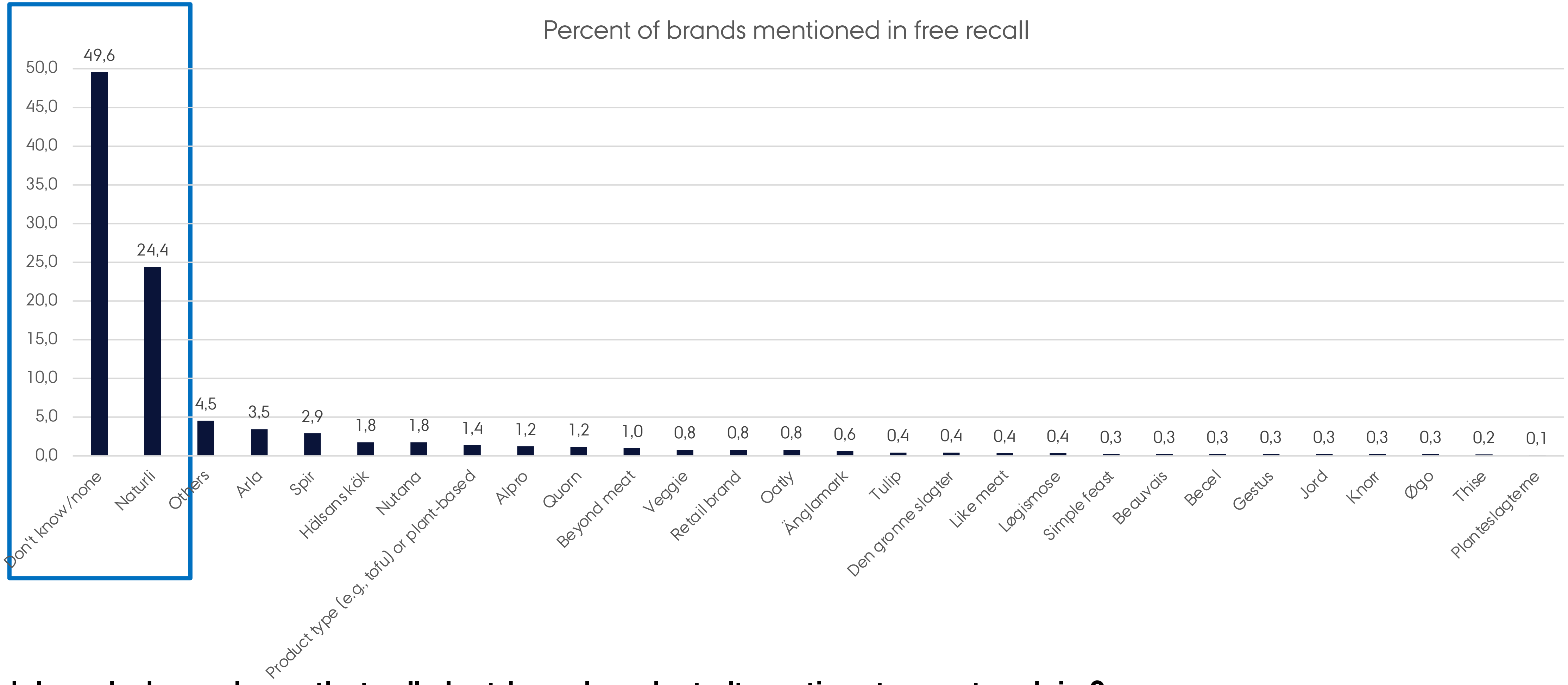
LUNCH OR DINNER WITHOUT MEAT

Lunch 27.4% - 4 or more days out of the week

Dinner 16.5% - 4 or more days out of the week

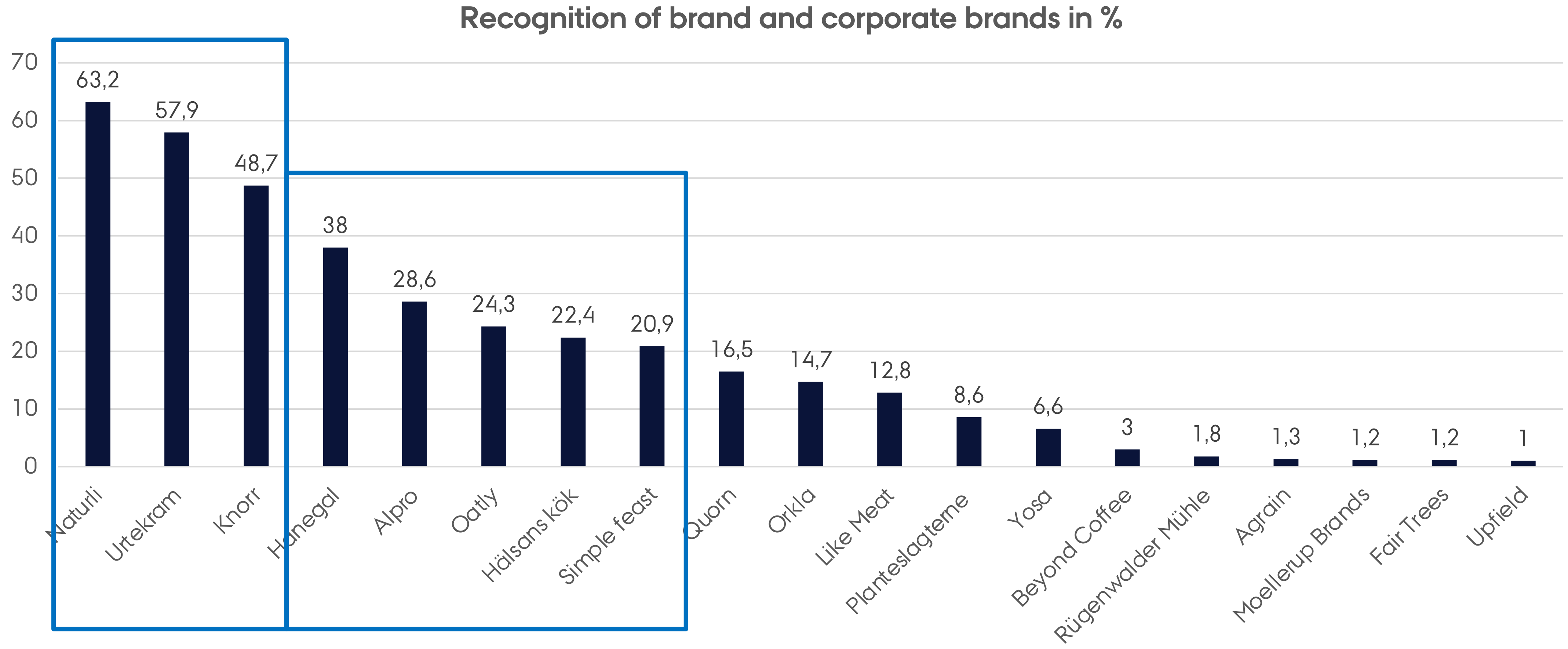


BRAND AWARENESS (UNAIDED)



"Which brands do you know that sell plant-based product alternatives to meat or dairy? Please name as many as you can think of!"

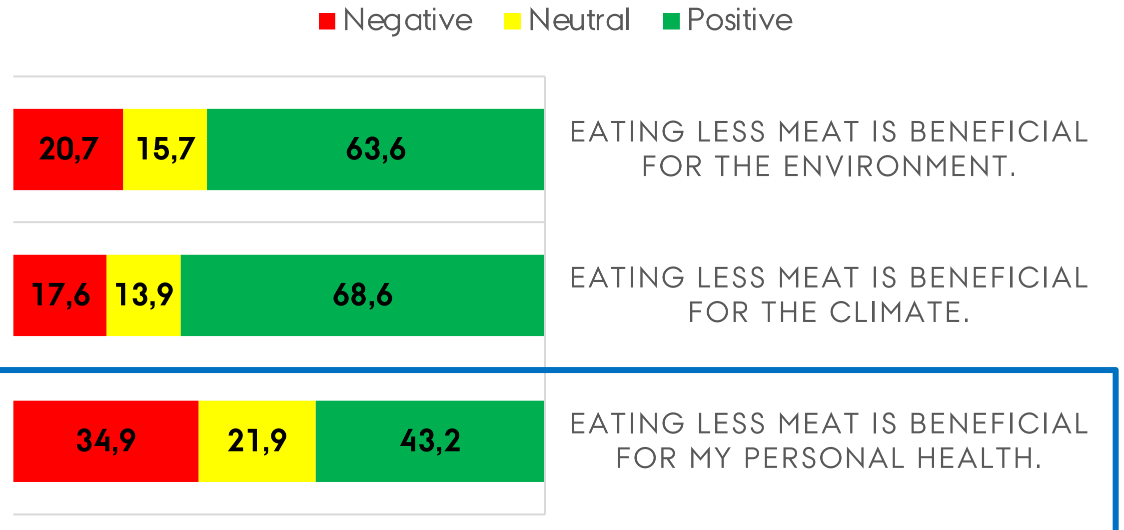
BRAND AWARENESS (AIDED)



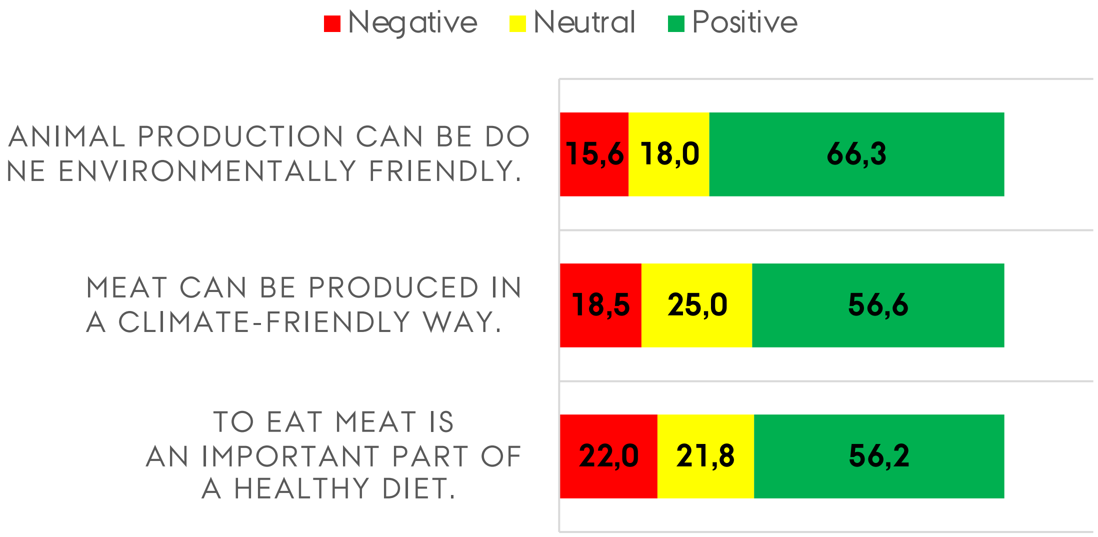
"Which of the following brands and producers that sell plant-based product alternatives to meat or dairy products do you recognize having seen or heard of?
Please tick as many as you recognize!"

BELIEFS ABOUT MEAT REDUCTION / MEAT

NEGATIVE PERCEPTIONS OF MEAT CONSUMPTION



POSITIVE PERCEPTIONS OF MEAT CONSUMPTION



CONFLICT 'PLANT VS MEAT' ?

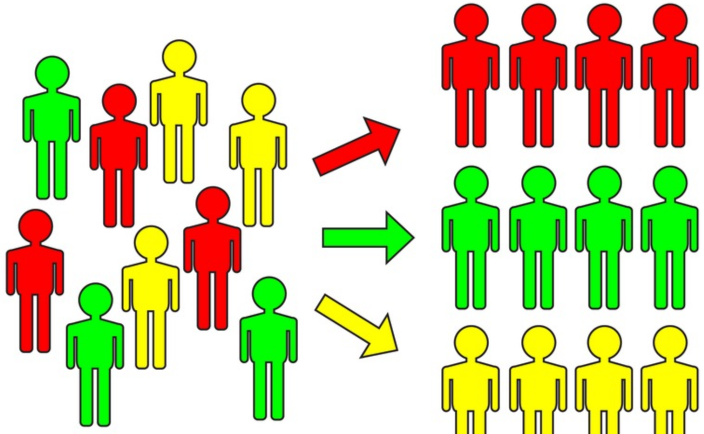
	Disagree (1/2/3)	Neutral (4)	Agree (5/6/7)
I perceive the public discussion around food as highly polarized.	12.8%	30.3%	56.9%
I would like people to be more tolerant towards different dietary choices.	11.9%	19.6%	68.4%
I feel judged for my food choices.	59.8%	17.7%	22.6%
I think food consumption is a matter of personal freedom.	11.4%	17.5%	71.1%
When someone appears to lecture me about which food to eat, I have found myself reacting with the opposite.	40.8%	25.6%	33.7%
I perceive there is a narrative based on 'us' versus 'them' when it comes to eating meat or plant-based foods.	18.0%	20.6%	61.4%

STATUS – HOW LARGE AND WIDESPREAD IS INTEREST IN PLANT-RICH DIETS SO FAR?

- Around one quarter of the Danish population perceive themselves as 'flexitarian'
- Low top of mind awareness of meat or dairy replacement brands
- Effect of meat reduction on health potential barrier
- 2/3 perceive quite a conflict around the issue in society

SEGMENTS – WHICH DIFFERENT SEGMENTS DIFFERING IN VIEWS & ACTIONS IN DK?

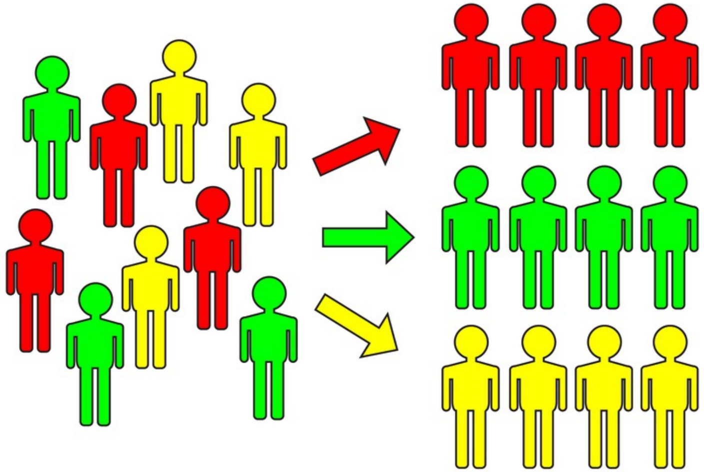
CONSUMER SEGMENTATION APPROACH



1) Segment identification based on mainly psychographic variables.
Perception of conflict, meat reduction benefits and sustainability of meat production, environmental concern, meat reduction behaviour of important peers

2) Segment characterization based on mainly sociodemographic variables.
Gender, age, region, education, dietary identification, cooking capability, etc.

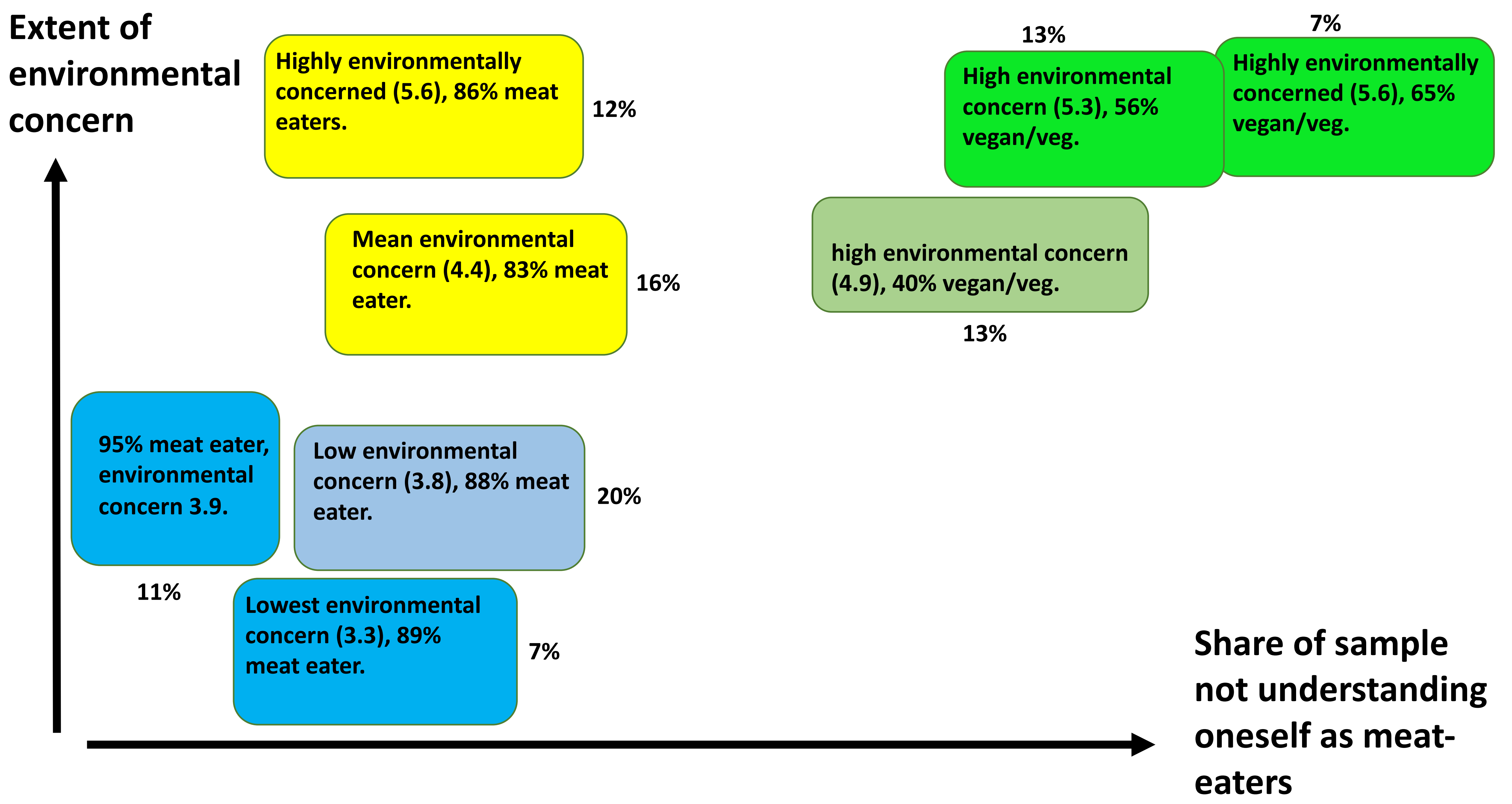
CONSUMER SEGMENTATION APPROACH



3) Segment names that help understanding.

Names that describe the most relevant distinctions, these might exaggerate and stereotype to carve out the differences.

Note: while helpful in applying the results, there is a danger of over-interpretation / insinuation of aspects not supported by data!


Extent of environmental concern
Highly environmentally concerned (5.6), 86% meat eaters.
12%
Mean environmental concern (4.4), 83% meat eater.
16%
95% meat eater, environmental concern 3.9.
11%
Low environmental concern (3.8), 88% meat eater.
20%
Lowest environmental concern (3.3), 89% meat eater.
7%
13%
High environmental concern (5.3), 56% vegan/veg.
7%
Highly environmentally concerned (5.6), 65% vegan/veg.
high environmental concern (4.9), 40% vegan/veg.
13%
Share of sample not understanding oneself as meat-eaters

BARRIERS AND OPPORTUNITIES FOR THE UPTAKE OF PLANT-BASED DIETS

- ✓ Development towards more plant-based diets – headed by young, urban and female frontrunners
- ✓ Health benefits of reducing meat only perceived by a minority of consumers
- ✓ Clear distinction of segments ~ current, potential, and unlikely consumers
- ✓ Important differences in degree of environmental concern, believe in benefit of meat reduction, and knowing others who have reduced meat
- ✓ Targeted information and/or nudging interventions for different consumer groups?

THANK YOU!

PlantPro contributes to accelerating an **efficient green consumer behaviour transition** towards more plant-rich diets and reduced food waste.

We aim to fill a knowledge gap on factors that drive consumer behaviour change towards more sustainable plant-rich diets and upcycled foods and greater acceptance of sustainable food technologies.

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MAPP CENTRE – RESEARCH ON VALUE CREATION IN THE FOOD SECTOR
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