

KANTAR

Consumption of
meat alternatives
and engagement
with Veganuary

Prepared by Kantar
for Food Standards
Scotland

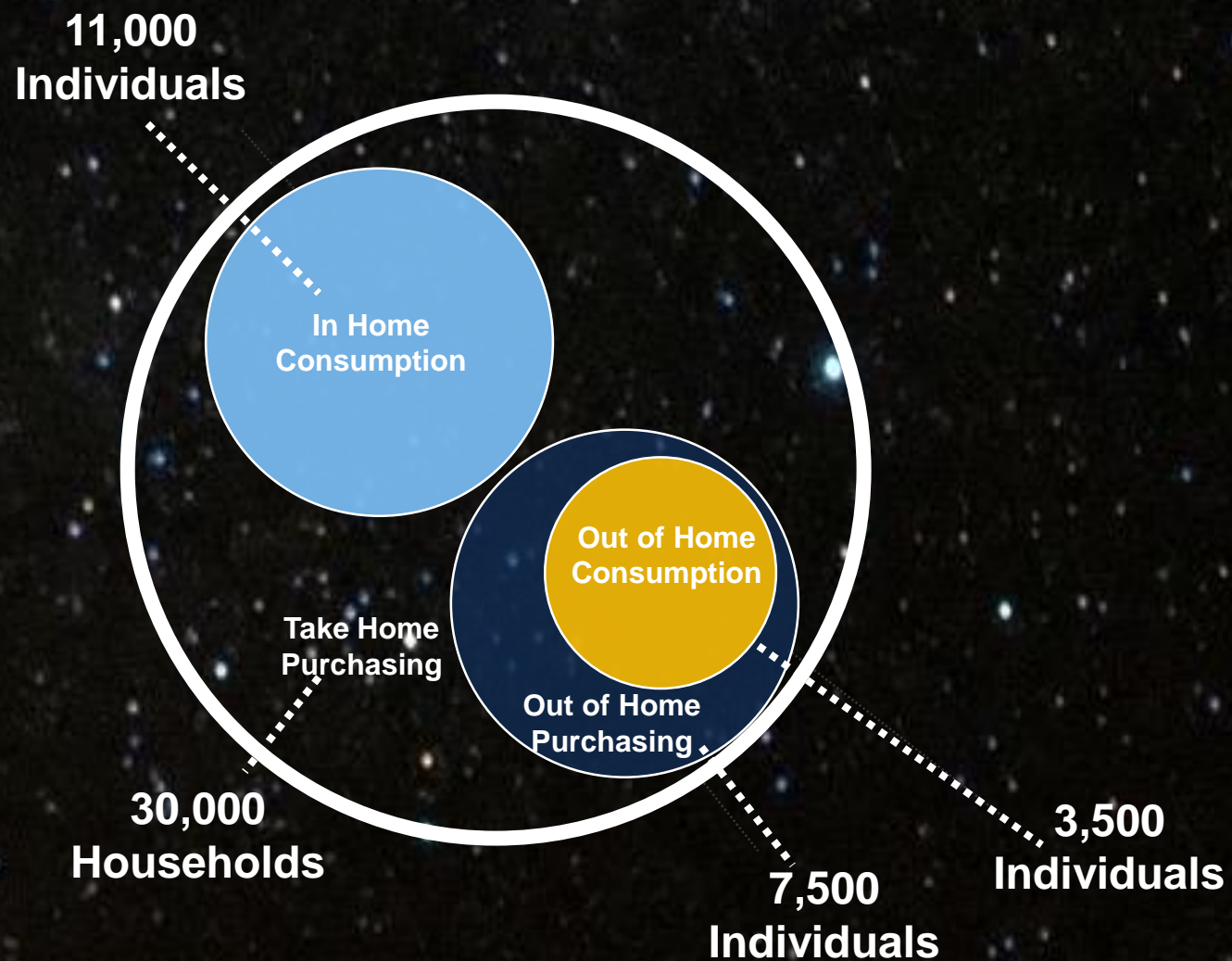
Chris Barron
Consumer Insight Director



Background to the Kantar usage panel

- Kantar are a market research company who collect longitudinal information on purchases into the home from a large Great Britain household consumer panel of around 30,000 households. A subset of around 11,000 individuals from these households also record the food and drink they eat at home or carry out (around 1,000 in Scotland). This subset of the main purchasing panel is called the usage panel.
- The panel is demographically and geographically representative of the GB population. The collected data is then weighted up to reflect the full population in Great Britain.
- Each panellist completes an average of 4 week long diaries each year, recording all the foods and drinks they consume at home or carry out. They also record information for all individuals in the household, including children.
- The usage panel collects information on how often foods and drinks are consumed, alongside information such as when, where and why foods were consumed. Panellists are not asked to weigh their food and therefore the data does not provide quantities of food and drink consumed.
- The usage panel does not include any food or drink purchased or consumed outside of the home (OOH), for example from restaurants, cafes, or 'on the go'. This information is collected by another subset of the main purchasing panel, with 7,500 individuals in GB recording their OOH purchases. Of this, 3,500 also record their OOH consumption.

What panels do Kantar have and how do they interact?



How does the usage panel work?

40,000 individual weekly diaries are completed across GB each year (approx. 3.5k from Scotland)

Each panellist completes a average of 4 week long diaries each year

Panellists record all foods and drinks consumed at home or carried out

Information is recorded for all individuals in the household including children

Usage panel data is linked to purchasing from wider take home purchase panel

Panellists are demographically representative of GB population

How does a panellist record what they eat?

Diary is filled out online on day of consumption for maximum recording accuracy

Panellists select day of week, followed by meal occasion

Products are selected from a **virtual cupboard** containing icons for all products purchased

This creates product level records of all food and drink consumption in-home

The screenshot displays the 'Food & Drink Diary' web application interface. At the top, there is a navigation bar with links for HOME, F.A.Q.s, REWARDS, HELP, CONTACT, and SIGN & LOG OUT. A yellow callout box says 'click here to watch the demo >'. Below the navigation bar is a header area with a strawberry icon and a 'help?' link. The main content area is divided into several sections:

- Day Selection:** A sidebar on the left shows 'Please choose a day' with 'MONDAY' selected. Below it, 'MONDAY' is repeated, followed by 'Breakfast' and a 'FULL NOW!' button with an 'edit' link.
- Who did or did not eat?:** A form with a question mark icon. It includes a table with columns: 'All ate:', 'Ate at home', 'Carried out of home (eg lunchbox)', 'Did not eat/drink', and 'ate out (not made in home)'. The rows are for 'Myself' and 'Alex'. There are radio buttons for each cell. To the right, there is a 'Time of day eaten' dropdown menu with options '6:00am - 6:59am' and '6:00am - 6:59am'.
- Adding products...:** A section with a search bar 'Product search: please enter product' and a 'find' button. Below the search bar is a list of product categories: 'FAVOURITE PRODUCTS', 'Hot Drinks', 'Cold Drinks', 'Breakfast Cereals', 'Cereal Bars', 'Bread & Rolls' (highlighted), 'Other Bakery', 'Butter+Dairy Spreads+Margarine', 'Jams Marmalade & Spreads', 'Fresh Fruit', 'Yoghurts & other tub desserts', 'Eggs', 'Fresh Bacon+Ham+Gammon', 'Joints', 'Sausages & Frankfurters', and 'Sauces Relish & Condiments'. There are buttons for 'full product list' and 'create dish'.
- Product Grid:** A grid of product images and names under the 'Bread & Rolls' category. Products include: '2 Baguettes (300g)', '2 Garlic Baguettes (340g)', 'Assam 2 Plain Naan Breads (200g)', 'Burgin Soya & Linseed Bread (300g)', 'Hovis Sliced White Bread (400g)', 'Hovis Wheatgerm Original Bread (400g)', 'Hovis Wheatgerm Original Bread (400g)', 'Kingsmill 10/10 Bread (400g)', 'Kingsmill White Farmhouse Bread (400g)', 'Mills & Spencer (MS) (Evo) The Bakery Multiseed White Bagel (1pk)', 'New York Bakery Co 4 Cornmeal & Raisin Bagels', 'Planet Deli 2 Garlic & Coriander White Tzatziki Bread (200g)', 'Sainsbury's Bakery Freshly Baked Bacon', 'Sainsbury's By Soft Round White Rolls (1pk)', 'Sainsbury's Garlic Baguettes (210g)', 'Sainsbury's Indian Garlic & Coriander Naan (130g)', 'The Traditional Range Granary Original Medium Sliced Brown Bread With Added Wheat Fibre (400g)', 'Waitrose Assorted Mini Rolls (12 pack)', 'Waitrose Essentials Plain White Burger Buns (1pk)', 'Waitburtons Danish Lighter White Bread (400g)', and 'Waitburtons Thin Sliced Bread With Sesame Seed Sunflower Seed Brown Linseed (400g)'. There are 'NO IMAGES AVAILABLE' messages for some products.
- Monday Breakfast:** A dark grey header with 'Monday Breakfast' and a 'we ate' button. Below it is a 'Cancel occasion' button.

Panellists describe the occasion, the meal preparation and record their reasons for consuming

The image displays three overlapping survey windows from a digital interface. The top window, titled "Who had what?", shows a list of products including "Burgen Soya & Linseed Bread", "Lurpak Butter Slightly Salted", "Grandessa Strawberry & Champagne Conserve", "Taylors Of Harrogate Yorkshire Gold 160 Te...", and "Robertson's Golden Shredless". The middle window, titled "How was the food prepared?", also lists the same products. The bottom window, titled "Please click on every product to enter your reasons for eating or drinking", shows the same product list. A sub-window titled "Select as many main reasons as apply" is open over the product list, showing a list of reasons with checkboxes: "Enjoy the taste" (checked), "Fancied a change", "Quick to prepare", "Easy to prepare or clean up", "All that was available", "Lower in fat/salt/sugar" (checked), "Filling", "Complements rest of meal", "Health benefits (fibre/vitamins etc)", "More natural / less processed" (checked), and "Calorie or portion control".

Who had what? 1 of 3

How was the food prepared? 2 of 3

Please click on every product to enter your reasons for eating or drinking 3 of 3

Burgen Soya & Linseed Bread (800g)

- Lurpak Butter Slightly Salted (500g)
- Grandessa Strawberry & Champagne Conserve ...
- Taylors Of Harrogate Yorkshire Gold 160 Te...
- Robertson's Golden Shredless (454g)

Select as many main reasons as apply

- Enjoy the taste
- Fancied a change
- Quick to prepare
- Easy to prepare or clean up
- All that was available
- Lower in fat/salt/sugar
- Filling
- Complements rest of meal
- Health benefits (fibre/vitamins etc)
- More natural / less processed
- Calorie or portion control

previous next

We are then able to report on a variety of measures...



Who

- Age
- Gender
- No. People Present
- Demographics
- Guests



What

- Dishes
- Compliment-ary Products
- GB Plate



When

- Occasions
- Type of Occasion
- Time of Day
- Days of Week



Where

- In Home
- Carried-out
- Lunchbox?



Why

- Needs States
- Needs Benchmark
- Motivations



How

- Prep Method
- Prep Time of the Occasion



Throughout the presentation there is a view on demographics, broken down by:

Lifestage of buyer:

Under 45s, No Children

Age of main shopper is under 45 and there are no children in the household. This would include student households.

Families

A household containing children (anyone 15 and under)

Over 45s, No Children

Age of main shopper is over 45 and there are no children in the household. This is made up of Older Dependents (main shopper 45-64, 3+ people in HH), Empty Nesters (main shopper is 45-64, 1-2 people in HH) and Retirees.

Social Class

Class A

Upper Middle Class; Higher Managerial Position

Class B

Middle Class; Intermediate Managerial

Class C1

Lower Middle; Junior Managerial, Supervisory, Clerical Workers

Class C2

Skilled Working Class; Skilled Manual Workers, Craftsmen, Specialist

Class D

Working Class; Semi/Unskilled Manual Workers, Apprentices, Labourers

Class E

Non-working

The slide deck focuses on consumers' behaviour in Scotland but additional data for GB has been used to provide further insights where Scotland data was not available. The relevant data source is identified by a marker in the top right hand corner of each slide.



Glossary of Terms

Veganuary: Veganuary is a non-profit organisation that encourages people to try a vegan diet in January and beyond.

Meat alternatives: Includes products such as meat free mince, sausages, burgers and meat substitute pieces.

Occasions: An individual's eating or drinking moment. Note if a family of four all eat a meal this counts as four occasions.

Servings: As above but counting for each individual element of the meal. We use Servings when looking at need states because different elements of a meal may be for different needs.

Need States: Panellists select from a pre-defined list all relevant drivers of consumption.

Ate Out/Out of home (OOH): When panellists fill in an occasion that took place out of the house they will select that they 'Ate Out'.

X w/e: The X number of weeks prior to the date given. For example, 4 w/e 27 Dec 20 would cover the 4 weeks from 30th November 2020 to 27th December 2020.

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Engagement with
Veganuary in 2021



Worldpanel Plus: using mobile technology to gather receipts and survey responses from a large scale online Community

- + **>90,000** live users / shoppers and growing.
- + Over **500,000+** receipts a week, many received within minutes of the shop. We can see shoppers' behaviour as it happens in real time.
- + Speaking to real Shoppers, identifying the real choices that shoppers make

1. Retailer
2. Product Detail
4. Total Spend

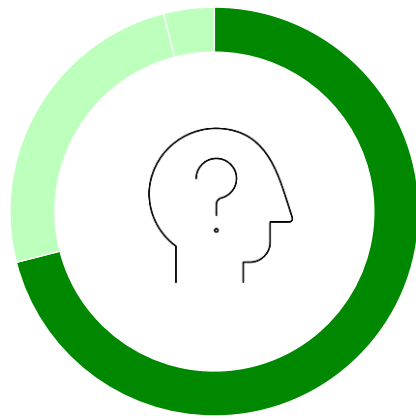
3. Price paid

5. Date and Time

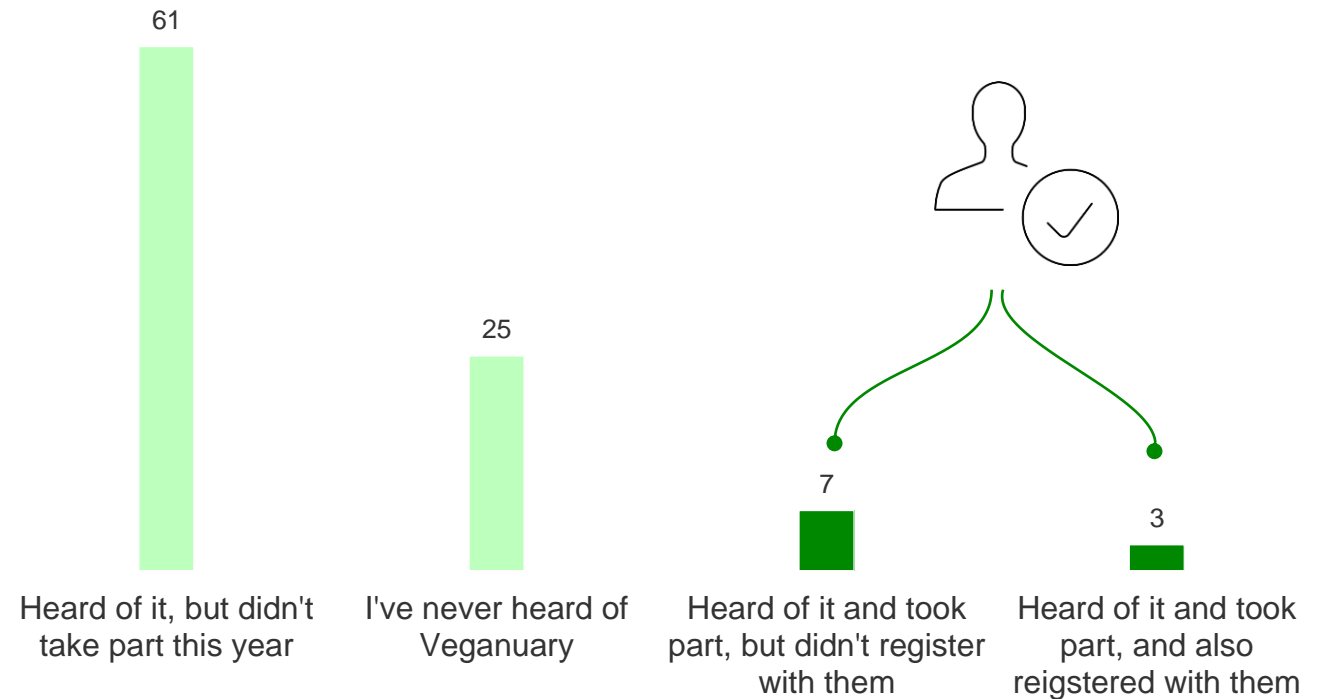


Across GB: Over 71% of respondents were aware of Veganuary in 2021, with 10% participating (vs. 9% in 2020).

Have you heard of Veganuary and were you involved this year?



71% were aware of
Veganuary in 2021
69% in 2020



In 2020 health was the top reason for taking part in Veganuary, with other reasons fairly equally important for taking part....

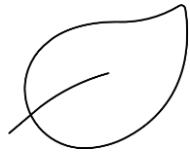
What were your reasons for taking part in Veganuary?

42%



Health
reasons

28%



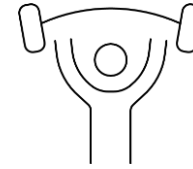
Environmental
reasons

27%



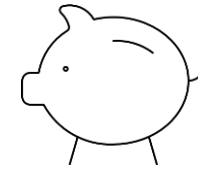
Ethical
reasons

27%



Personal
challenge

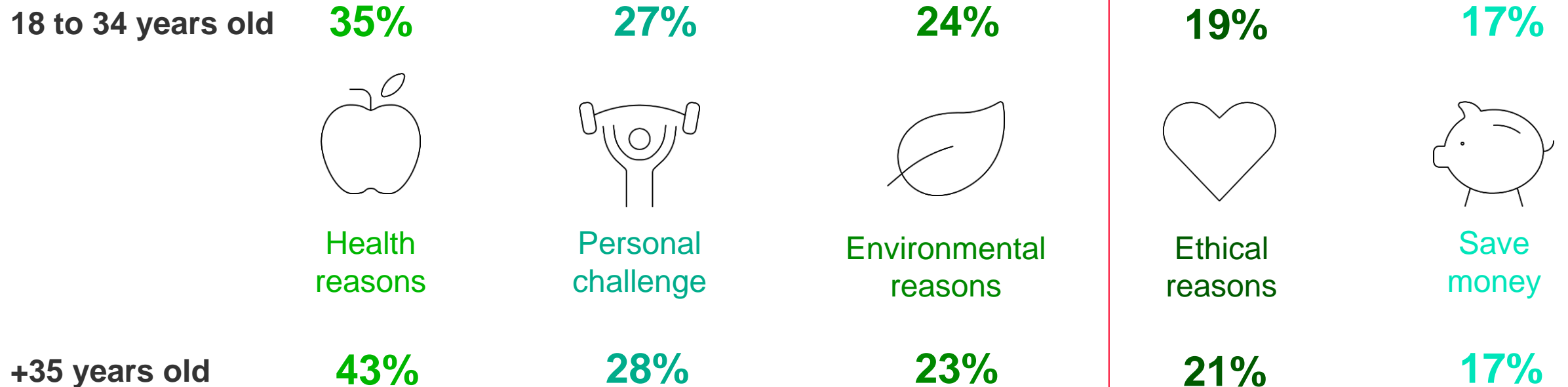
27%



Save
money

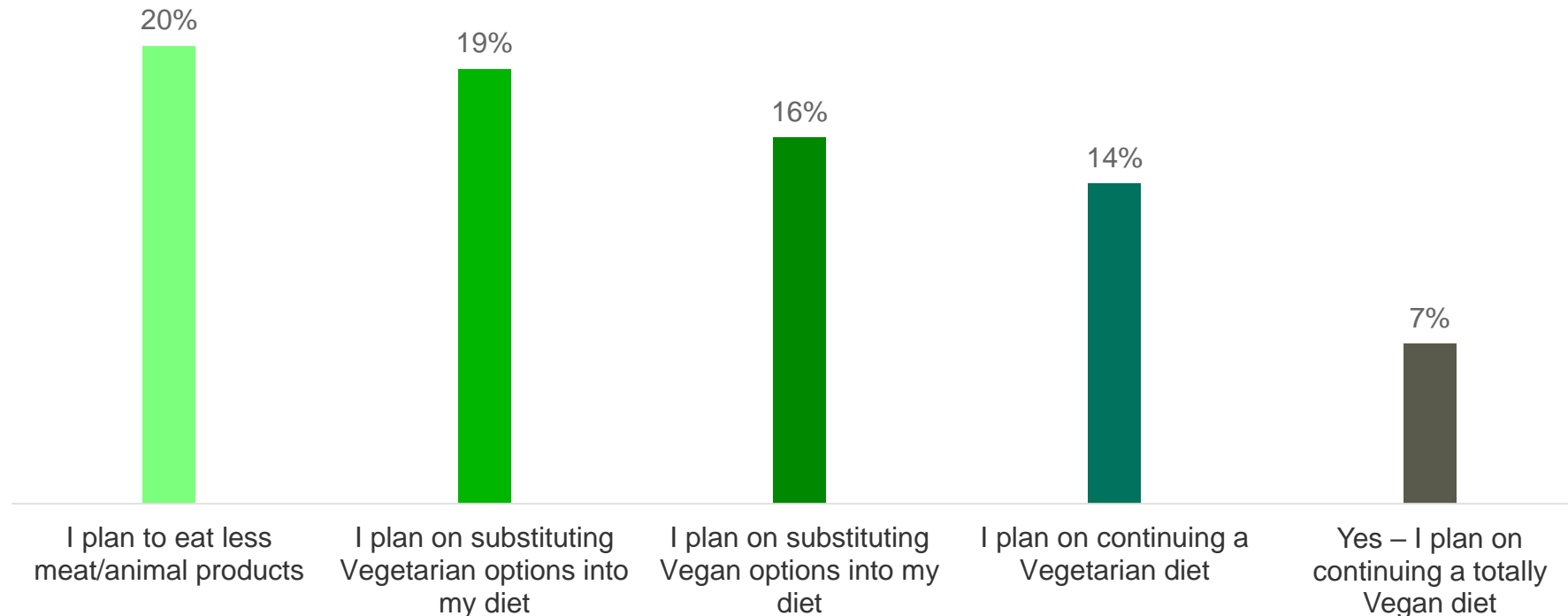
In 2021, health remained the top reason for participating in Veganuary, especially for those aged 35+ years. Compared to 2020, ethical and money saving reasons decreased in 2021.

What were your reasons for taking part in Veganuary?



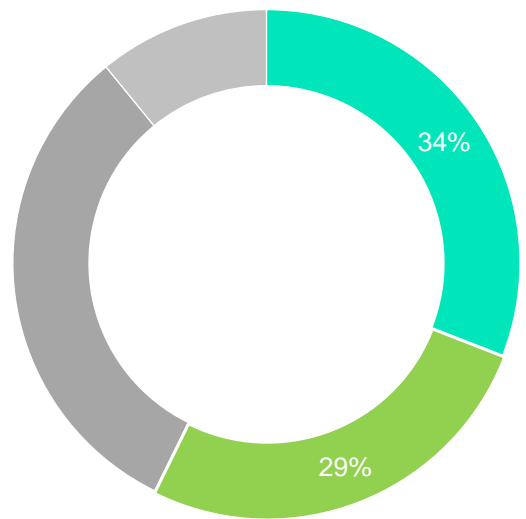
55% of the participants of Veganuary planned to make changes to their diets after January, either by eating less meat or animal products or by introducing vegetarian or vegan substitutes to their diets. A further 21% plan to maintain a full vegan or vegetarian diet after Veganuary.

Once Veganuary is over, do you plan on continuing a Vegan diet?

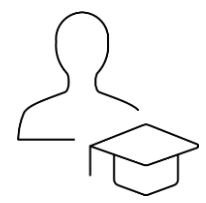


63% of people who didn't take part in Veganuary tried vegan and/or vegetarian products anyway. 18-34 year olds and those from social classes AB and C1 were more likely to try these types of products than other age groups and social classes.

Have you tried any vegan or vegetarian products at any point during January, that you haven't tried before?
(Of those that didn't take part in Veganuary)



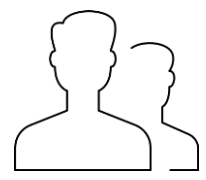
- Yes, I've tried some vegan products
- Yes, I've tried some vegetarian products
- No, I haven't tried any vegan or vegetarian products
- Not sure



Index

Yes, I've tried some vegan products
 Yes, I've tried some vegetarian products

	Class AB	Class C1
Yes, I've tried some vegan products	10% more likely	5% more likely
Yes, I've tried some vegetarian products	7% more likely	4% more likely



Index

Yes, I've tried some vegan products
 Yes, I've tried some vegetarian products

	18-24	25-34
Yes, I've tried some vegan products	25% more likely	12% more likely
Yes, I've tried some vegetarian products	10% more likely	5% less likely

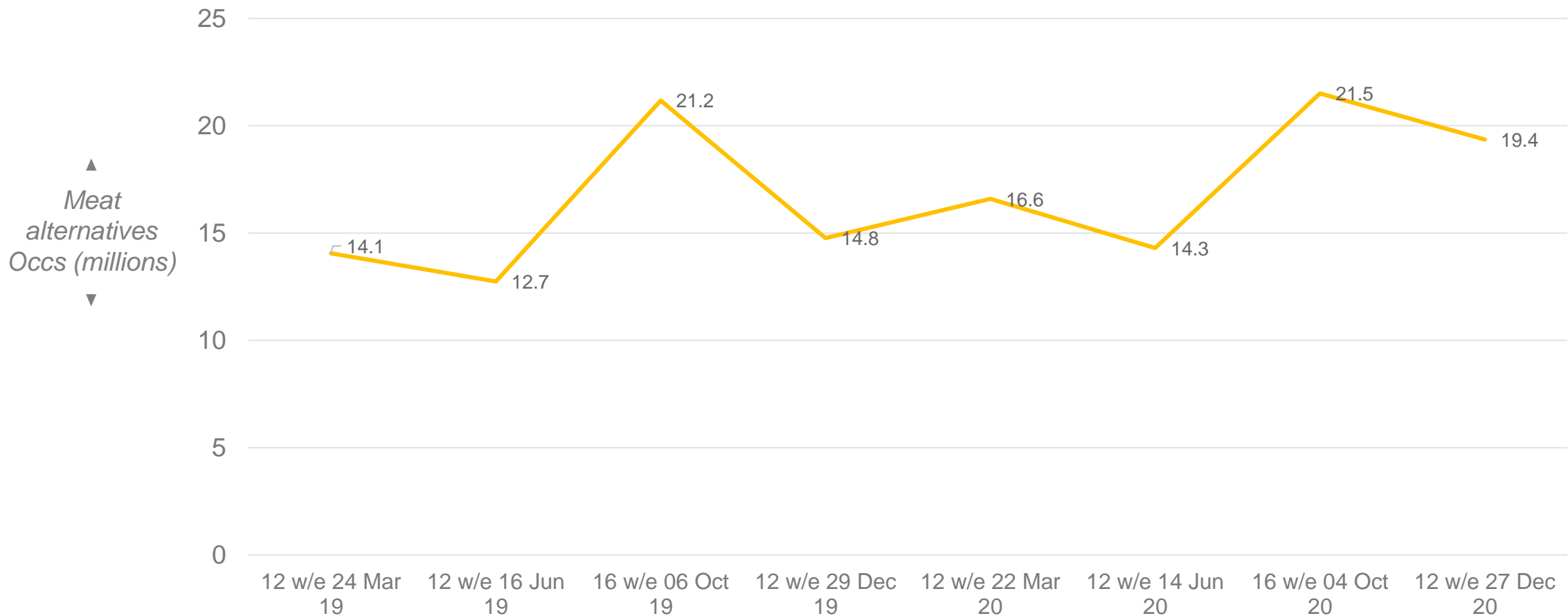
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So are we eating more meat alternative products?



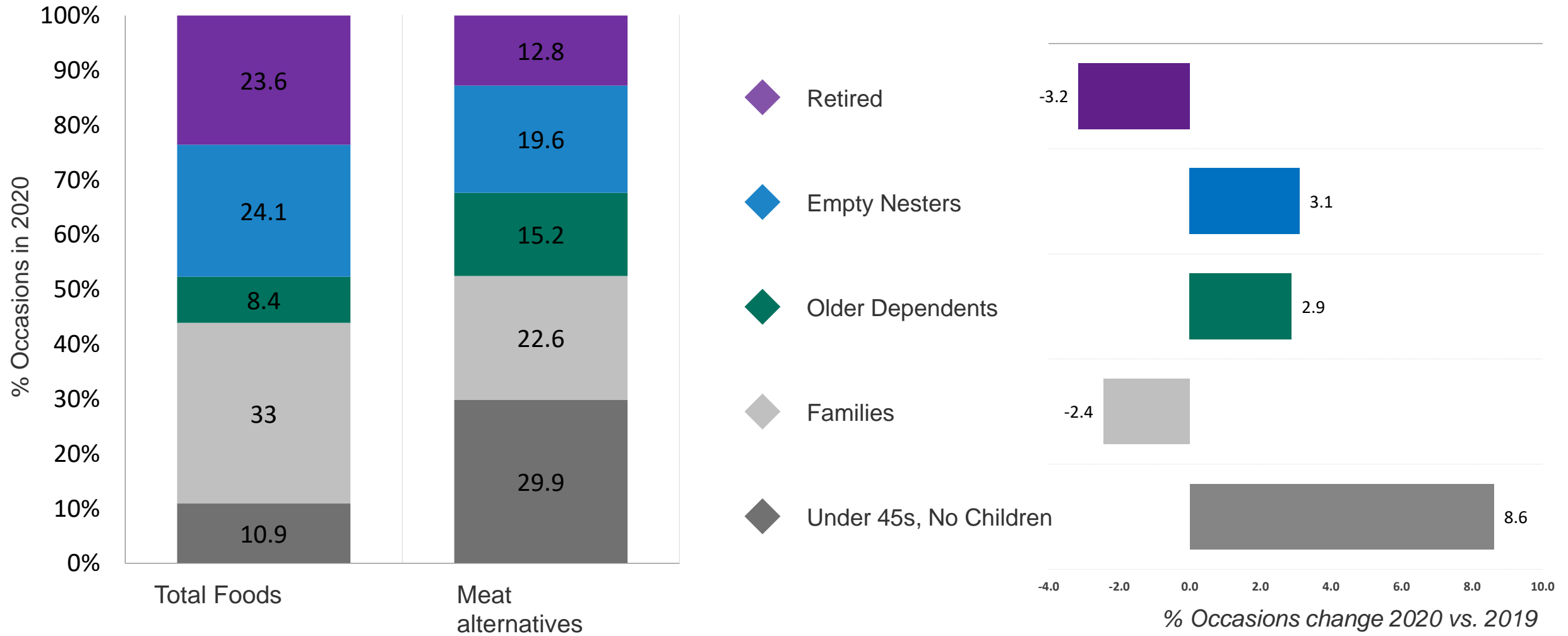
There has been an overall increase in consumption of meat alternative products between 2019 and 2020

Scotland

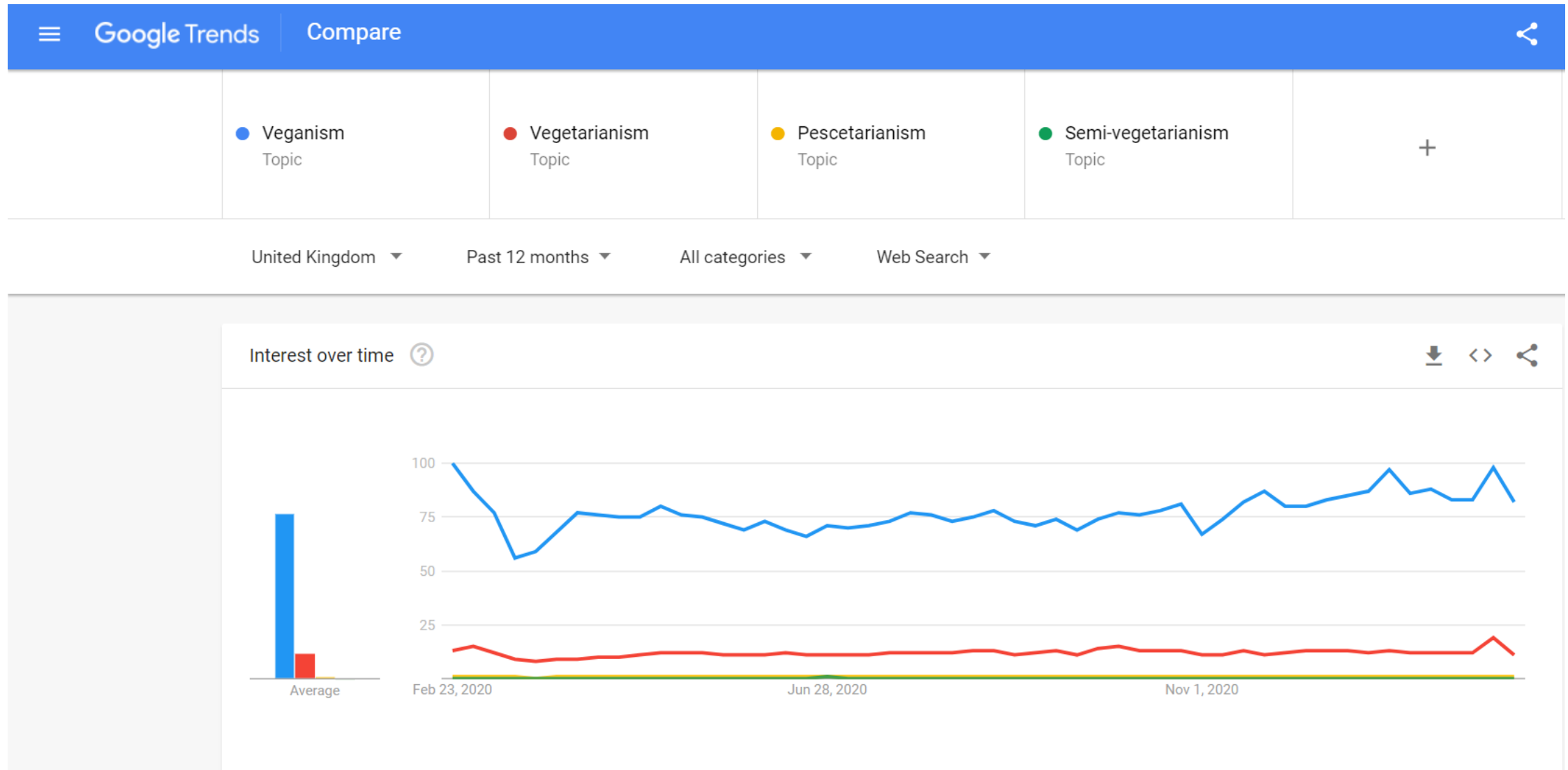


Under 45s households have the greatest share of meat alternative occasions and have seen the largest increase between 2019 and 2020.

Scotland

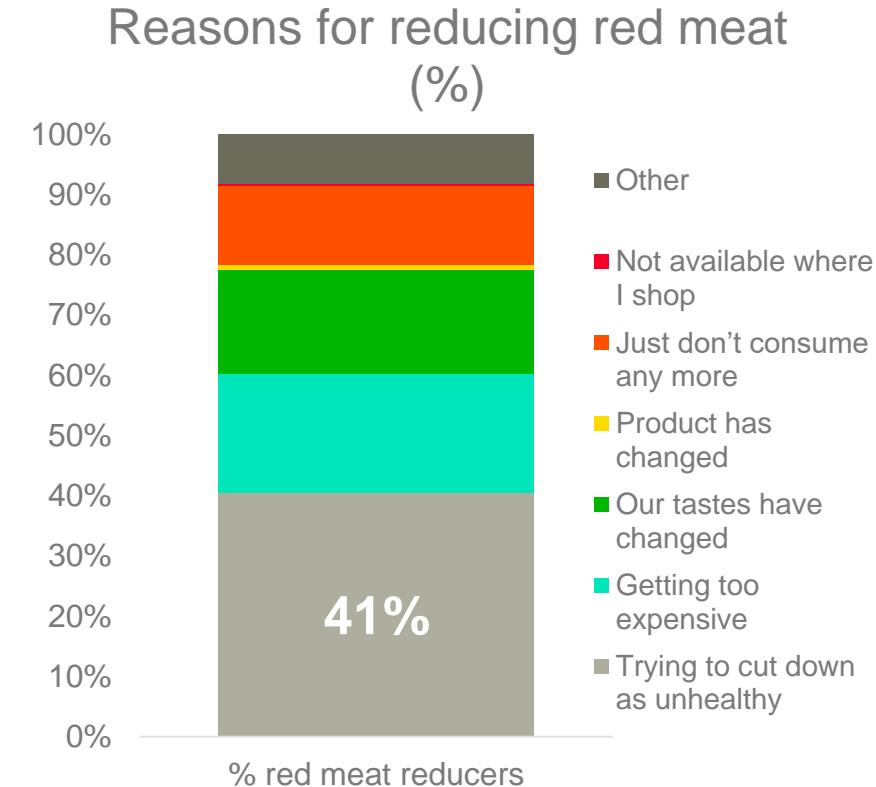
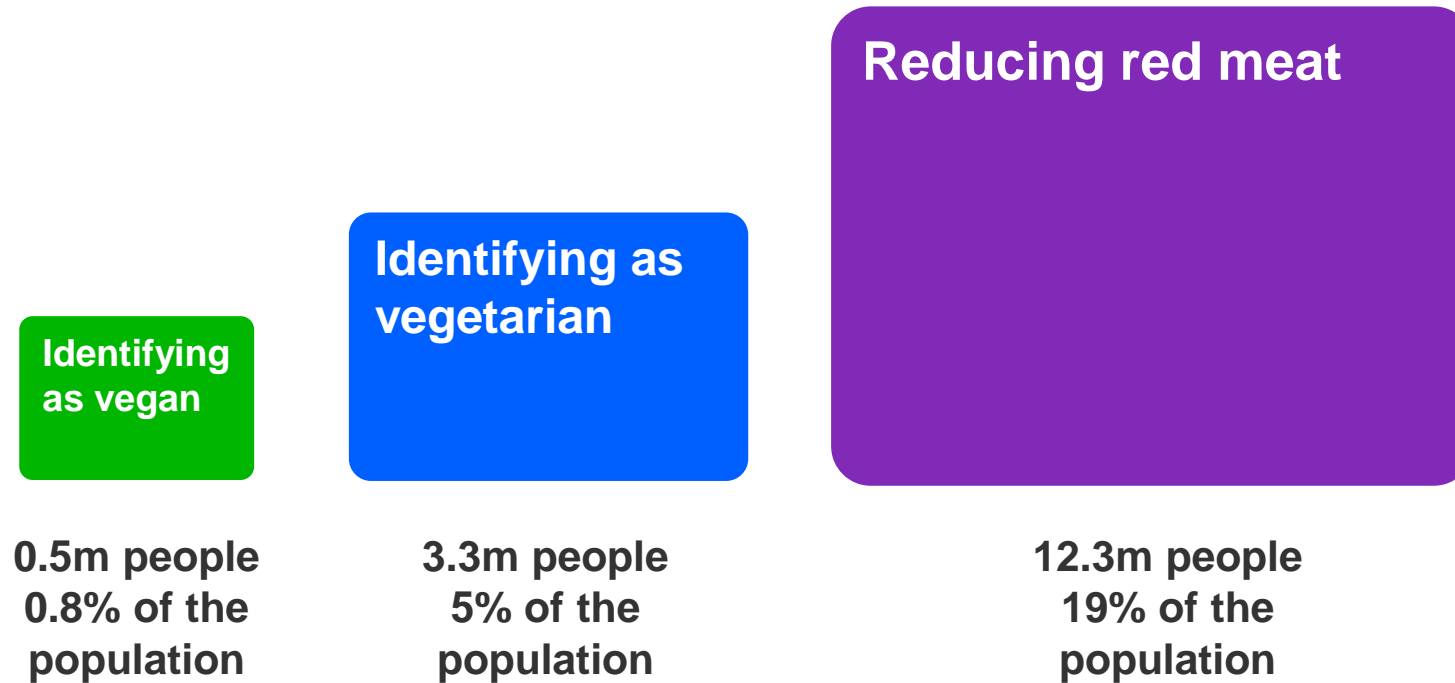


Google trends suggests Veganism may be increasing.

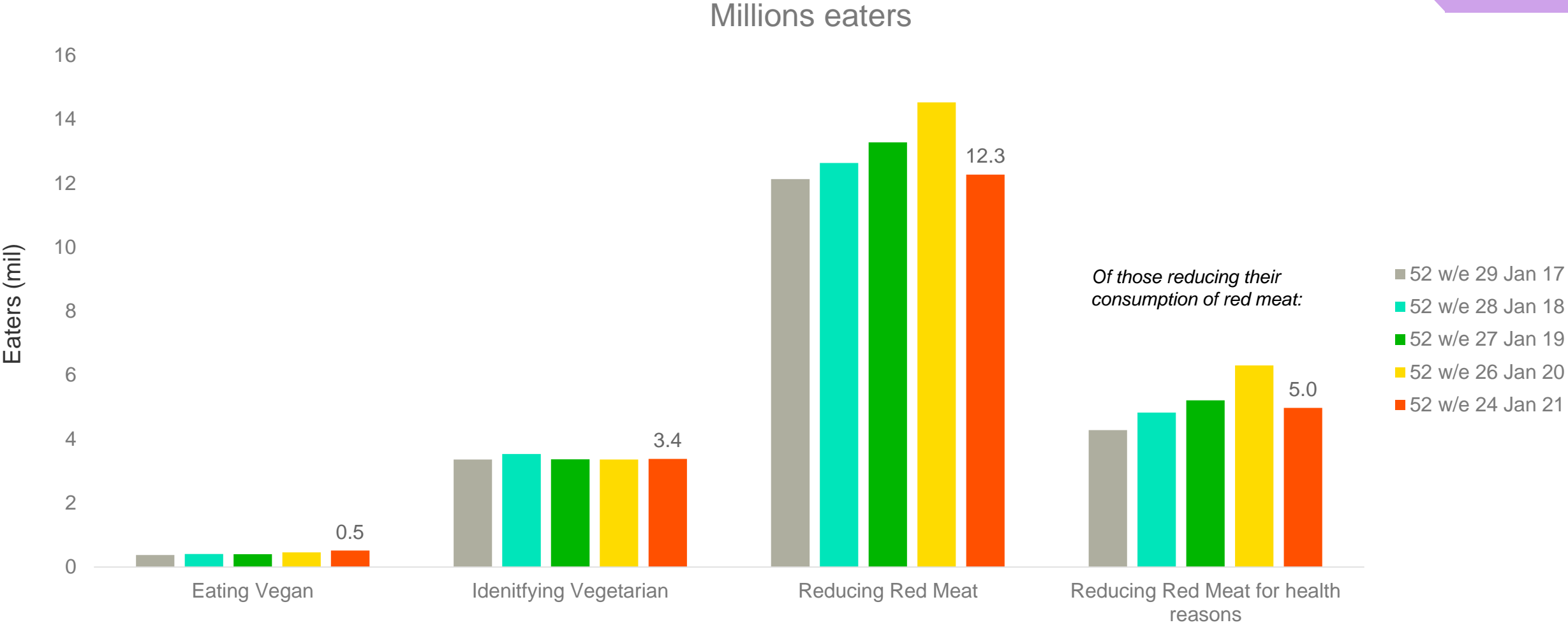


....but when we measure weekly consumption behaviour across GB, the biggest group are those reducing their intake of red meat (12.3 million people in 2020).

GB



However fewer people across GB were claiming to reduce their red meat consumption between January 2020 and January 2021 compared to the previous 3 years.



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Overall summary



Overall summary

This report provides information on consumption of meat alternative products in Scotland between 2019 and 2020, using data from Kantar. The report also provides insights into engagement with Veganuary in 2020 and 2021 across GB.

Key findings include:

- In 2021, 71% of GB respondents were aware of Veganuary, with 10% participating. Health was the lead reason for participating. 55% of the participants of Veganuary planned to make changes to their diets after January, either by eating less meat or animal products or by introducing vegetarian or vegan substitutes to their diets. A further 21% plan to maintain a full vegan or vegetarian diet after Veganuary.
- 63% of people who didn't take part in Veganuary tried vegan and/or vegetarian products anyway. 18-34 year olds and those from social classes AB and C1 were more likely to try these types of products than other age groups and social classes.
- There has been an overall increase in consumption of meat alternative products between 2019 and 2020. Under 45s households have the greatest share of meat alternative occasions and have seen the largest increase between 2019 and 2020, compared to other life stages.
- 19% of the GB population reported reducing their red meat intake in 2020. However, this was lower than in the previous 3 years.

This report complements and adds to existing FSS data on monitoring trends in food consumption and dietary intake.