

Consumer attitudes and purchase intentions regarding Meat Substitute Products

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Introduction

The vegetarian and vegan food market in Germany has grown significantly throughout the last years¹. Therefore, meat substitute products (MSP) were created for this new market. Such products aim to mimic meat products by using plant-based sources². In order to generate input for the development and promotion strategies of this product variety, there is a need to understand the drivers and barriers between the different consumer groups.

Objectives

- Identification of the main consumers of MSP.
- Identification of the attitudes of the consumer towards the MSP and reasons to buy them.
- Gathering of information in order to help marketers on how and to whom to target their products.

Methods

- Design of a survey with 14 questions
- Data collection conducted randomly in the city of Kassel.
- Total of 200 questionnaires answered.

Constraints

- No support from any company sponsor.
- Observations were not normally distributed.
- Unequal sample size.

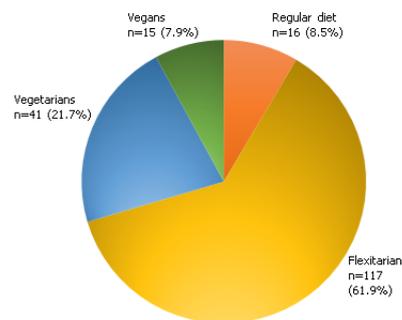


Figure 1: Distribution of consumers' diet

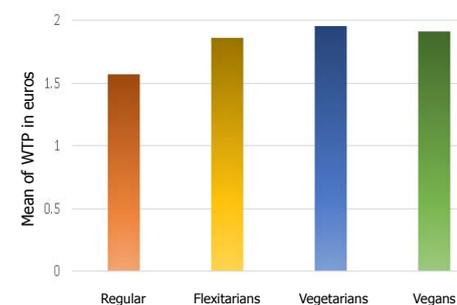


Figure 2: Willingness to pay (WTP) according to the diet

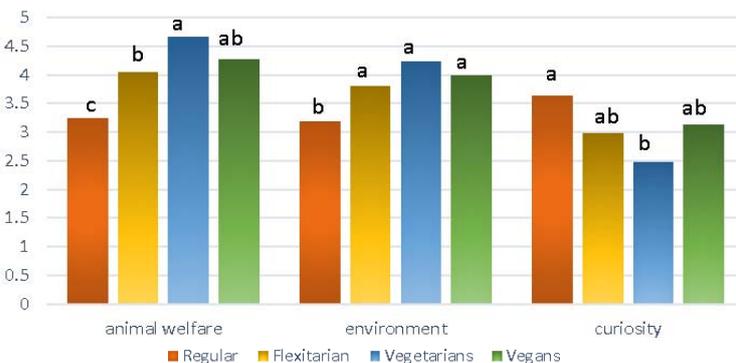


Figure 3: Mean values for the reasons to buy MSP in a scale of importance from 1 to 5. The bars with different letter are significantly different from each other ($p \geq 0.05$)

Statement	Diet			
	Regular	Flexitarian	Vegetarian	Vegan
WTP for Bio-certified	(43.80%) 2.94 ^b	(61.50%) 3.58 ^{ab}	(82.90%) 4.17 ^a	(80%) 3.93 ^a
WTP for vegan meat substitute	(18.80%) 2 ^b	(27.30%) 2.66 ^{ab}	(26.80%) 2.66 ^{ab}	(28.50%) 3.53 ^a
Environmental concern	(43.80%) 3.13 ^b	(60.90%) 3.57 ^{ab}	(75.60%) 4.1 ^a	(73.30%) 4 ^{ab}
Animal welfare	(56.30%) 3.25 ^b	(68.30%) 3.93 ^b	(97.50%) 4.68 ^a	(73.30%) 4.07 ^{ab}
Brands	(18.80%) 2.25 ^a	(24.40%) 2.34 ^a	(24.4%) 2.73 ^a	(46.60%) 3.27 ^a
Taste vs Environment	(31.30%) 3.13 ^a	(14.70%) 2.36 ^{ab}	(12.2%) 2.07 ^b	(13.30%) 2.13 ^b
No additives vs taste	(12.50%) 2.19 ^b	(42.70%) 3.29 ^a	(34.10%) 3.2 ^a	(53.30%) 3.8 ^a
Flavor similar to meat	(31.30%) 2.44 ^a	(27.40%) 2.71 ^a	(17%) 2.24 ^a	(6.70%) 1.93 ^a

Table 1: Mean values and percentages of statements between the consumers' diet in a scale of importance from 1 to 5. The values with different letter are significantly different from each other ($p \geq 0.05$)

Results

- The main consumers of MSP are females following a flexitarian diet, between an age of 18-35 and with a high education level.
- Regular consumers show less concern about the environment and animal welfare but show the highest curiosity.
- Vegan consumers have the lowest frequency of consumption of MSP while the highest frequency belongs to the vegetarian consumers.
- There is a significant effect of the type of diet towards to a higher intention to pay more for an organically certified MSP as well as for a vegan MSP. In both aspects, vegetarians and vegans have the highest mean value.

Conclusions

- Many MSP are branded as vegan, however, the main consumers of such products follow a flexitarian diet. This might be due to vegan consumers' perception towards these products as highly processed.
- Contrarily as expected, the diet has no significant effect on the general willingness to pay for MSP.
- A MSP certified as organic should be marketed particularly for vegans and vegetarian consumers.