

THE FUTURE OF FAST FOOD

Consumer insights into
plant-based menu items



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INTRODUCTION

This consumer insight report takes a dive into the diverse world of plant-based fast food.

We've collected data from the US, the UK, and Germany, and the results provide some interesting insights. By digging into the findings, we've uncovered what's driving these culinary changes and what gets consumers excited. The following data will help your company to make the right moves and keep up with today's fast-changing food scene and the transformation of our global food system.



In recent years, there's been a major shift in what people are choosing to eat. Health, ethics, and our planet's well-being are moving into the spotlight. This shift towards plant-based eating is everywhere, notably in the fast-food industry. The rise of plant-based options isn't just changing menus and shopping habits; it's also changing how we think about food, including fast food.

The major players – including Burger King, Subway, KFC, and Domino's Pizza – are clearly aware of this shift, as reflected in their changing menu options, although the fried chicken and pizza market segments are falling behind in the plant-based race. In general, fast food chains are not just adding a simple veggie burger – they're cooking up a whole range of plant-based goodies that cater to both full-on vegans and the growing number of people who are looking to cut down on their meat consumption.

At ProVeg, we recently looked at how the major fast-food restaurants are doing in terms of their plant-based menu options. (Click [here](#) to see the results of that ranking). The goal of this latest survey was to find out if consumers perception match or differ from our ranking analysis. This exploration sheds light on the dynamic relationship between consumer perceptions of fast-food menus and the chains' actual offerings.

ABOUT THE SURVEY

The data presented here was collected through an online survey conducted in July 2023. A total of 1,500 respondents from the US, the UK, and Germany (500 respondents from each country) participated in the survey. These countries were chosen based on the high share of flexitarians and popularity of fast food restaurants.

We collected data in relation to several demographic categories, including age, gender, and educational background, setting quotas for age, gender, and dietary habits in order to ensure that the sample was representative of the general population and equally distributed with respect to these variables. The sample consisted of people who follow various dietary habits.

EXECUTIVE SUMMARY

Just under half of consumers are open to trying plant-based fast food: 46% of respondents said that they are open to trying the plant-based products available in fast-food restaurants, with vegans, vegetarians and flexitarians showing the highest willingness to consume these products. There is a higher openness to trying plant-based alternatives in the UK, with 47% of people likely to try a plant-based option in fast-food restaurants, followed by 42% in the US, and 35% in Germany.

Half of consumers are satisfied with the plant-based options that are currently available: Overall, 50% of consumers are satisfied with the current plant-based offerings in fast-food chains. German participants expressed the highest level of satisfaction, followed closely by UK and US respondents.

About 60% of consumers are happy to see plant-based options available in fast-food restaurants: Overall, 61% of respondents stated that they are in favour of fast-food restaurants including plant-based options on their menus. In Germany, 62% hold a positive opinion of brands that have vegan or plant-based choices on their menu, closely followed by the UK, where 61% share the same sentiment, and the US, where the figure is 58%.

McDonald's leads the field in terms of repeat purchases: McDonald's leads in terms of the most frequent consumption, while Burger King has the highest trialling rate, indicating that a larger number of people who have tried its plant-based products without consistently purchasing them. Most consumers know about the plant-based options offered by Burger King and Subway, although they have not tried them for themselves. When asked about brands that consumers do not associate with plant-based options, KFC and Pizza Hut emerged as the top choices.

Subway and McDonald's are the winners when it comes to taste and product range: Subway and McDonald's lead overall, with the highest awareness among German and UK consumers in terms of having both the tastiest and the most plant-based options. In the US, Subway and Burger King take first and second place, respectively, in both 'most options' and 'tastiest' options.

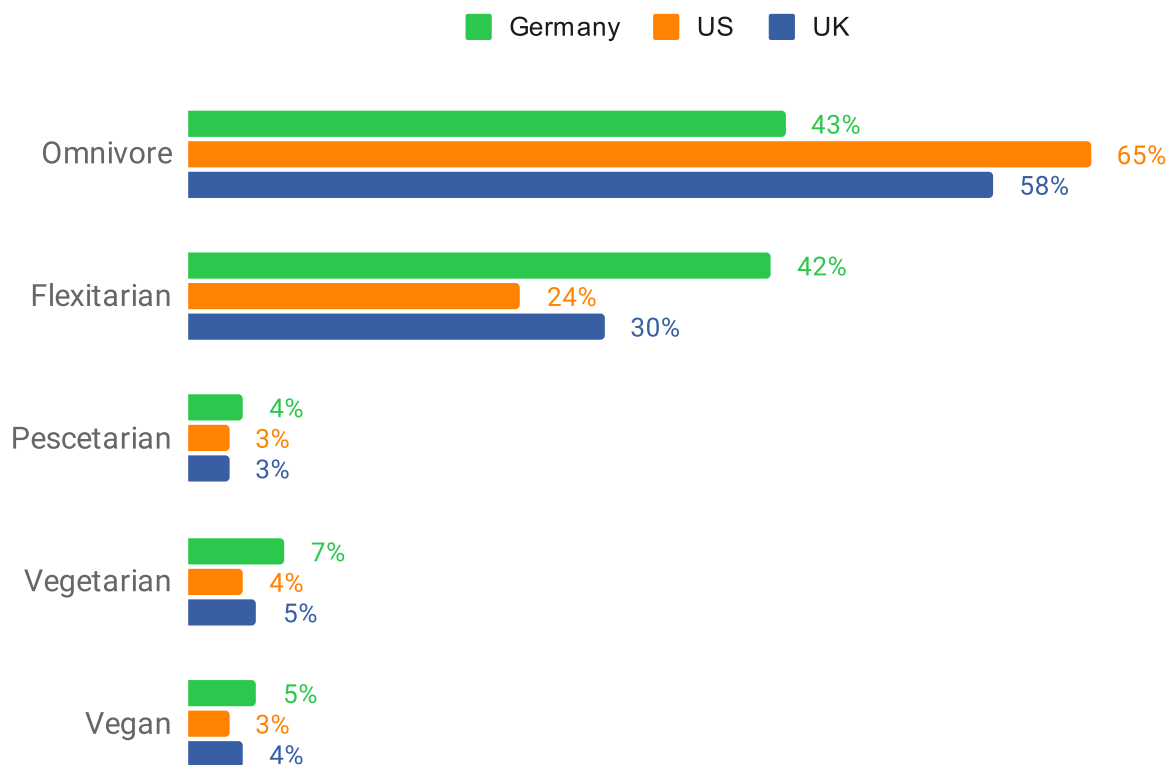
Taste and price are the key purchase drivers: Overall, taste and price are the main priority for consumers. As such, brands should continue to enhance tasty and affordable experiences at every point of contact. Convenience and the tendency of consumers to try new products and experiences presents an opportunity for brands to further leverage engagement among consumers.

60% of consumers understand the labelling used for plant-based products: More than 60% of consumers across Germany, the US, and the UK understand the plant-based or vegan labeling systems used in fast-food restaurants.

Only 13% of consumers find cross-contact completely unacceptable: 42% of consumers in the US and Germany think that it is acceptable for plant-based patties to potentially come into contact with meat or other animal-based products on fast-food grills. 31% are undecided, while 14% show some level of intolerance and 13% find it very unacceptable. In the UK, however, only 34% of consumers think that cross-contact is acceptable.

RESULTS

DIETARY LIFESTYLE



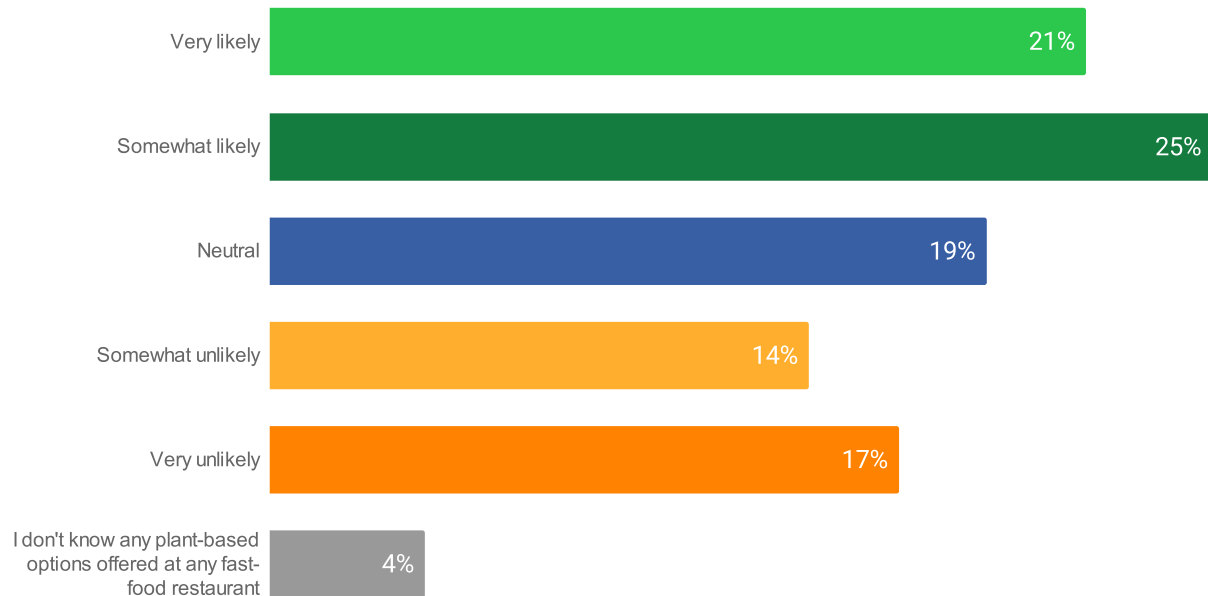
Q1: Which category best describes your current dietary lifestyle?

In terms of food preferences, US consumers lean heavily towards omnivorous diets, closely followed by the UK. In comparison, flexitarians and omnivores are nearly equal in Germany. This is the most popular dietary type in Germany, with the US and the UK trailing behind quite a bit. Germany also takes the lead in terms of the number of people following a vegetarian diet, And when it comes to veganism, Germany is again at the forefront, followed by the UK, and then the US.

Overall, Germany seems to have a stronger tendency towards plant-based eating habits, compared to the other two countries, which aligns with the overall trend for a high share of German flexitarians.

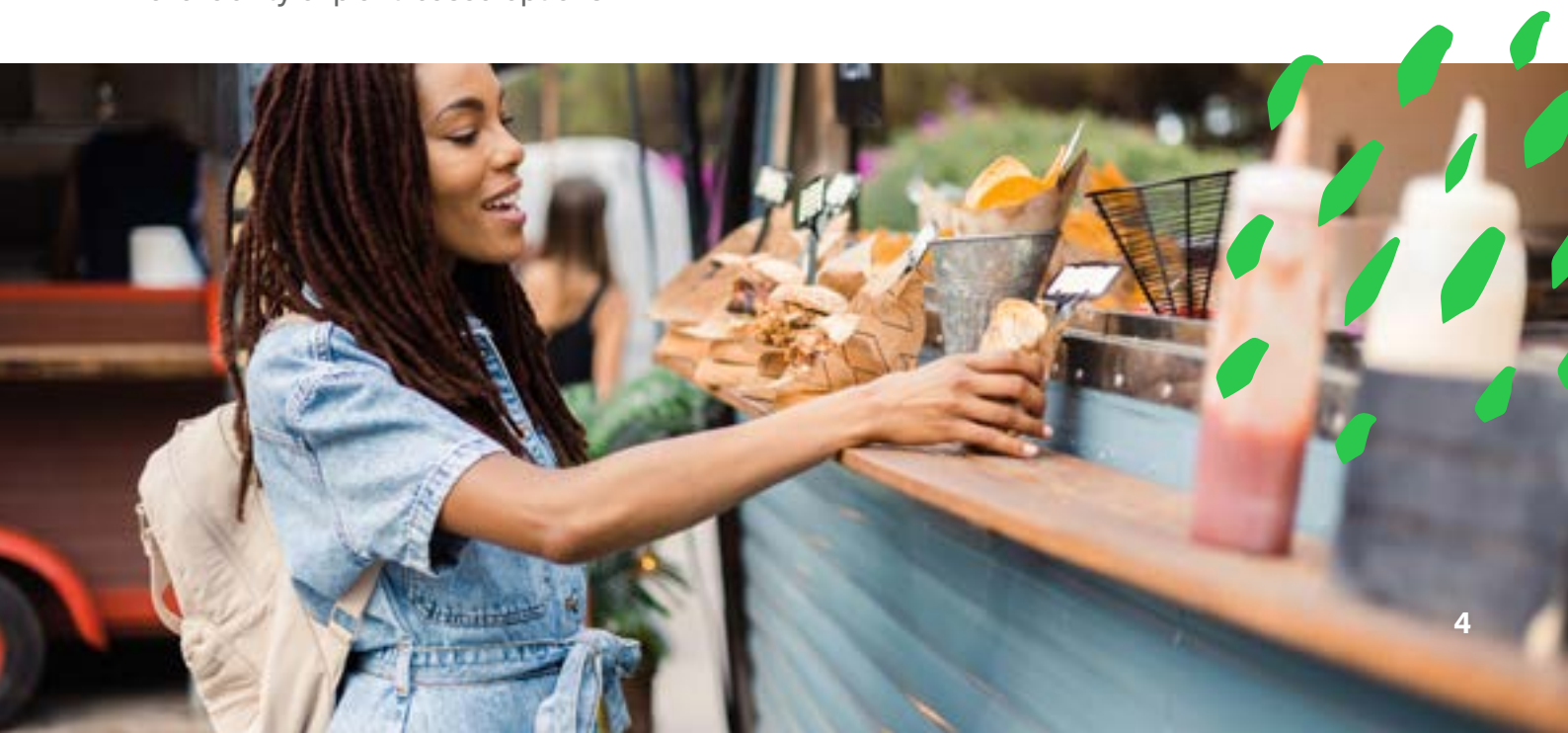


WILLINGNESS TO PURCHASE PLANT-BASED FAST FOOD



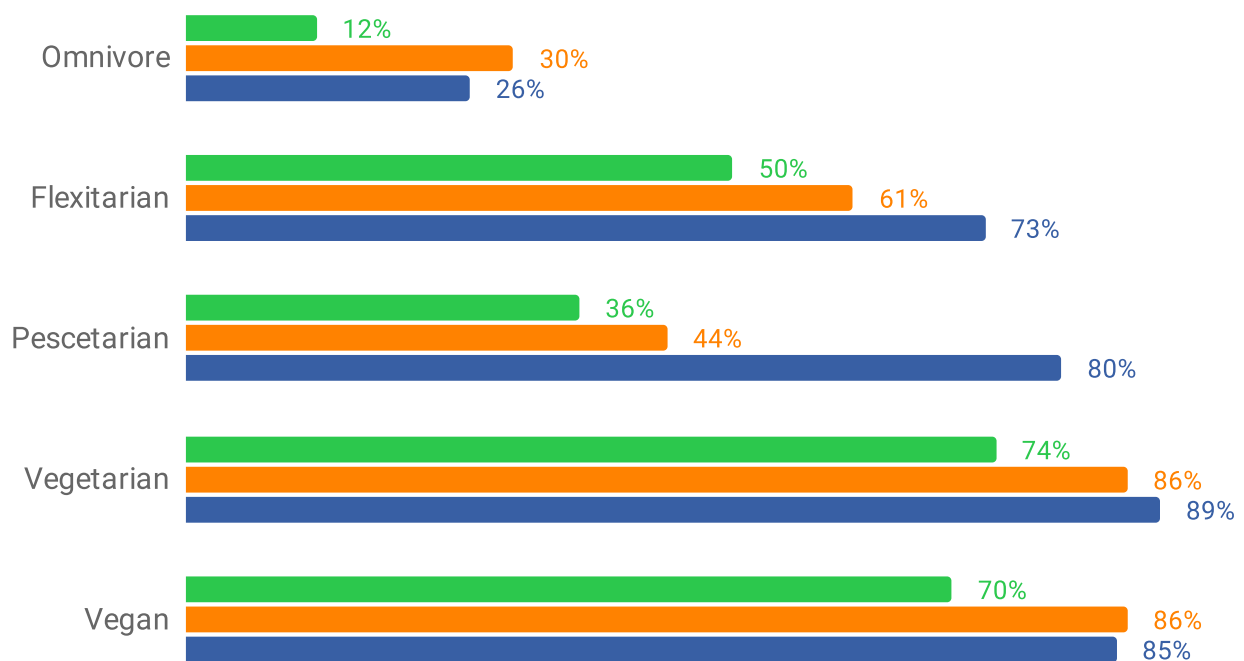
Q2: How likely or unlikely are you to purchase a plant-based option the next time you visit any fast-food restaurant?

When asked about the likelihood of purchasing plant-based options during their next visit to a fast-food restaurants, 45% of participants showed an inclination towards plant-based choices. Approximately 21% of all participants expressed a strong inclination to choose plant-based options, with 25% expressing some inclination. On the other hand, 17% were very reluctant and 14% were somewhat unlikely to consider plant-based options. A further 19% remained neutral and needed more information or incentives. A small percentage (4%) were not aware of the availability of plant-based options.





WILLINGNESS TO PURCHASE PLANT-BASED FAST FOOD (BY DIETARY TYPE)



Q2: How likely or unlikely are you to purchase a plant-based option the next time you visit any fast-food restaurant?
(Sum of 'Very likely' + 'Somewhat likely')

- » Interestingly, in the US (30%) and the UK (26%), omnivores showed higher openness towards plant-based options, compared to Germany (12%).
- » Flexitarians in the US (61%) and the UK (73%) lean more towards plant-based choices than Germany (50%).
- » Pescetarians in the UK (80%) are most likely to choose plant-based options, followed by the US (44%) and Germany (36%).
- » Unsurprisingly, vegetarian consumers in all countries are strongly enthusiastic about plant-based options, with 89% (UK), 86% (US), and 74% (Germany) of vegetarians very likely or somewhat likely to choose a plant-based option.
- » 86% of vegans in both the US and UK showed similar enthusiasm, with Germany slightly lower at 70%.

CONSUMER RANKING: FAST FOOD CHAINS

Popular Plant-Based Picks

1. McDonald's (45%)
2. Subway (38%)
3. Burger King (37%)

(I regularly + occasionally purchase them)



Tried But Not Frequent

1. Burger King (48%)
2. McDonald's & Subway (47%)
3. Domino's Pizza (42%)

(I have tried them, but I don't purchase them often)



Known But Untasted

1. Burger King & Subway (51%)
2. KFC & Domino's Pizza (50%)
3. Pizza Hut (47%)

(I know about them, but I have never tried them)



Uncharted Territory

1. KFC & Pizza Hut (51%)
2. Domino's Pizza (50%)
3. Subway & Burger King (41%)

(I don't know this brand/it's plant-based options)



Popular Plant-based Picks: McDonald's takes the lead in terms of most frequent consumption. Subway comes in second place, with Burger King following closely in third place. Domino's Pizza, although well known among consumers, ranked slightly lower than the other three fast-food chains in terms of plant-based consumption. In the US, Subway takes the top spot for most loyal customers, while in the UK and Germany, McDonald's is the number-one consumer choice for plant-based options.

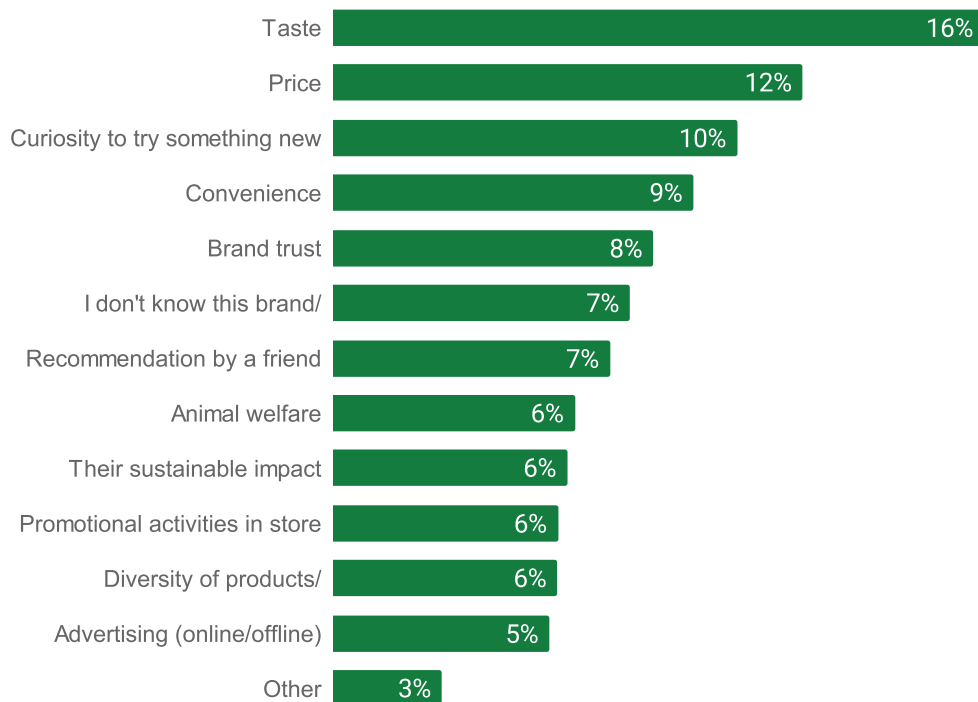
Tried But Not Frequent: Burger King stands out in the highest-trial category, indicating a higher number of people who have tried its plant-based products but do not necessarily continue to buy them. McDonald's and Subway tied for second place, with Domino's Pizza close behind, reflecting a notable number of respondents who have also tried their options.

Known But Untasted: Most consumers indicated that they know about the plant-based options at Burger King and Subway, but have never tried them. The two chains are closely followed by Burger King and Subway, which tied for second place in terms of high familiarity but low trial numbers. Third place goes to Pizza Hut.

Uncharted Territory: When asked about brands that consumers do not associate with plant-based options, KFC and Pizza Hut emerged as top choices. Domino's Pizza is closely followed by Subway and Burger King, which are slightly more widely recognised in terms of offering plant-based meals.

Overall, the rankings suggest that McDonald's dominates in terms of familiarity and consumption of plant-based options, closely followed by Burger King and Subway, which also have strong market positions. However, Burger King stands out for its high trial rankings, suggesting that consumers are curious about its plant-based options, although they may need to make some improvements to encourage more repeat purchases. Pizza Hut and Domino's Pizza rank lowest in terms of both familiarity and consumption. In the case of these two pizza-based chains, it could reflect both limited marketing and limited availability of plant-based alternatives.

MAIN DRIVERS OF PLANT-BASED FAST-FOOD CONSUMPTION



Q4: Which of the following factors have influenced you the most to purchase a plant-based option at the mentioned fast-food restaurants?

The factors that most influence customers' decisions to order plant-based foods in fast-food restaurants are taste (16%) and price (12%). Ten percent of respondents find trying new foods interesting, while convenience (9%) and brand trust (8%) are also significant factors.

When choosing plant-based products, 7% of people look to recommendations, while ethics and sustainability were both considerations for 6% of people, with variety and in-store promotions also being contributing factors for 6% of people.

It's important to note that 7% of people are unaware of some brands' plant-based options, suggesting that awareness should be raised. This is also likely to be related to the influence of advertising generally, which was only mentioned by 5% of respondents, suggesting that marketing efforts of plant-based options could be much more aggressive.



CONSUMER RANKING: NUMBER OF PLANT-BASED FAST-FOOD OPTIONS

	US	UK	Germany
1.	Subway	McDonalds	Subway
2.	Burger King	Subway	McDonald's
3.	McDonalds	Domino's Pizza	Burger King
4.	Domino's Pizza	Pizza Hut	Domino's Pizza
5.	Pizza Hut	Burger King	Pizza Hut
6.	KFC	KFC	KFC

Q5: Please rank in order, which of the following fast-food restaurants do you think have the most plant-based options on their menu? 1 having the most options, 6 having the least options.

In the US, Subway took the lead as the restaurant perceived as having the biggest number of plant-based options on their menu, followed closely by Burger King.

In the UK, the trend was slightly different, with McDonald's securing the top spot for plant-based options, and Subway in second place.

In Germany, Subway continued to dominate as the restaurant perceived as offering the most plant-based options, followed by McDonald's and Burger King, suggesting that these establishments are making strides to diversify their menus.

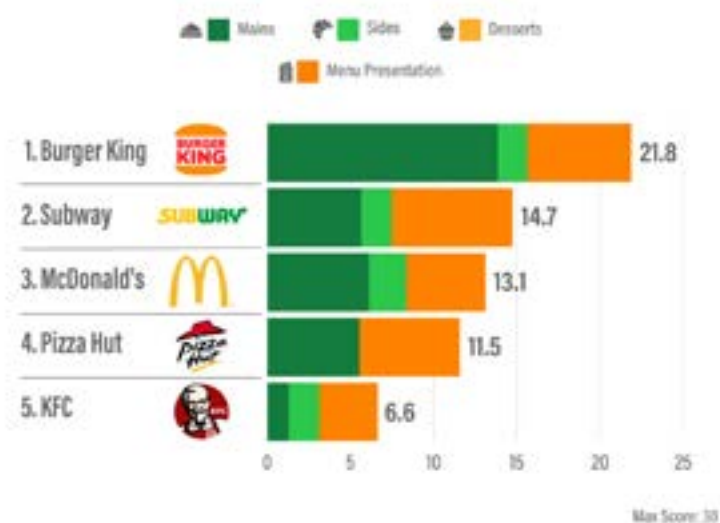
It is worth noting that KFC and Pizza Hut received lower rankings across all three countries, indicating potential opportunities for improvement in their plant-based offerings and promotion of existing options.



Yet, it's worth mentioning that our previous ranking analysis shows a different story. Burger King actually emerged as the top player in the UK, offering a wide range of plant-based options, which might surprise consumers who held different perceptions.

2023 PROVEG INTERNATIONAL FAST-FOOD RANKING

FAST-FOOD PERFORMANCE IN THE UK



Download the 2023 ProVeg International Fast Food Ranking [here](#).

CONSUMER RANKING: TASTE OF PLANT-BASED FAST-FOOD OPTIONS

In the US, Subway claimed the top spot in terms of having the tastiest plant-based options, with Burger King following closely behind.

In the UK, McDonald's emerged as the winner in terms of taste, while Subway took second place, with Domino's Pizza in a respectable third position.

In Germany, Subway once again secured the lead in taste, indicating that its plant-based options are particularly palatable. McDonald's and Burger King also fared well, similarly suggesting that their plant-based offerings are well-received.

Notably, Pizza Hut, Domino's Pizza, and KFC received lower rankings across all three countries, suggesting that there is need to enhance the taste of their plant-based menu items.

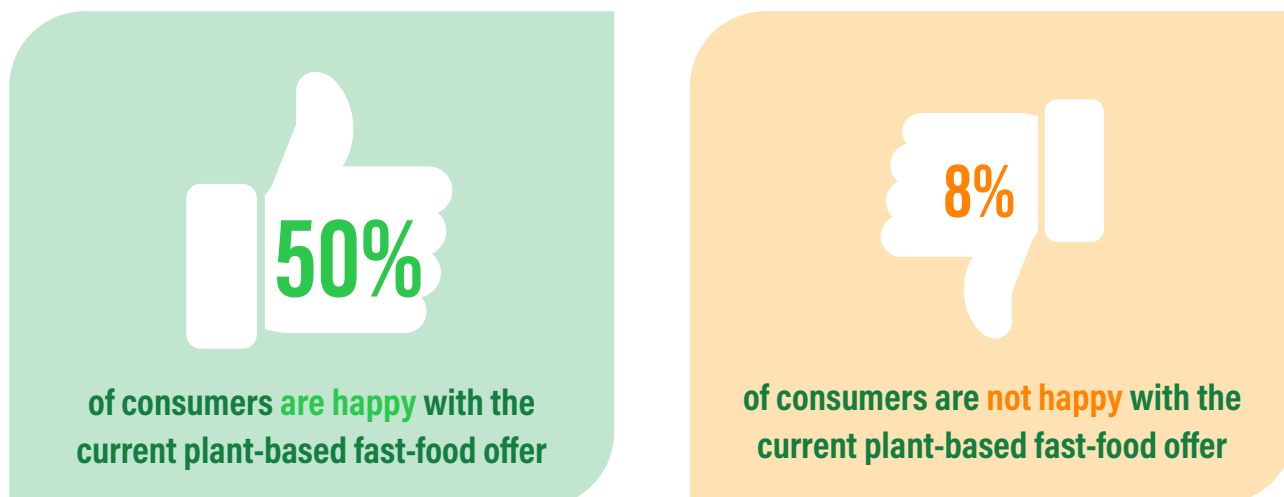
	US	UK	Germany
1.	Subway	McDonalds	Subway
2.	Burger King	Subway	McDonald's
3.	Pizza Hut	Domino's Pizza	Burger King
4.	Domino's Pizza	Pizza Hut	Domino's Pizza
5.	McDonalds	Burger King	Pizza Hut
6.	KFC	KFC	KFC

Q6: Please rank in order, which of the following fast-food restaurants do you think have the tastiest plant-based options on their menu? 1 being the tastiest, 6 being the least tasty.

Download our 2023 ProVeg International Fast-Food Ranking [here](#) to gain insights into how these fast-food restaurants are actually incorporating plant-based options and their corresponding rankings.



SATISFACTION WITH CURRENT PLANT-BASED FAST-FOOD OPTIONS



Q7: How satisfied or unsatisfied are you with the current offer of plant-based options from the fast-food restaurants mentioned above? (Burger King, McDonald's, Subway, Pizza Hut, KFC, Domino's Pizza) (Sum of 'Very satisfied' + 'Somewhat satisfied')

50% of consumers in the US, UK, and Germany stated that they are very or somewhat satisfied with the plant-based offerings currently available in fast-food chains. Of these consumers, 20% reported being very satisfied, while 8% of consumers were very dissatisfied with the plant-based dishes on offer. Germany takes the lead here, with 51% of people expressing satisfaction with the currently available options. The UK follows closely, with 50% of people reporting satisfaction. The US lags slightly behind, with 49% expressing satisfaction.

CONSUMER ATTITUDES TOWARDS PLANT-BASED FAST-FOOD OPTIONS



6 out of 10 people are in favour of plant-based options on fast-food menus

Q8: In general, what is your opinion of fast-food restaurants including plant-based options on their menu?

The data shows that consumer attitudes towards plant-based menu items at fast-food restaurants are generally favourable or neutral. A significant number of customers (61%) are in favour of including plant-based options on fast-food menus ('Very favourable' + 'Somewhat favourable'). Of these consumers, 28% had a very positive impression, while 9% of respondents indicated some level of dissatisfaction.

Germany leads the way in terms of how consumers think of fast-food chains that offer plant-based alternatives, with 62% of respondents saying they had a favourable impression of them. The UK rates follows closely behind, at 61%, with the US not much further behind, at 58%.

UNDERSTANDING OF VEGAN LABELLING AT FAST-FOOD CHAINS

Of the consumers surveyed, 28% of consumers strongly agree, and 39% somewhat agree that they understand the vegan descriptors used in fast-food restaurants, while 24% are undecided. This suggests a need for more clarification which would also benefit the 3% of consumers who considerably disagree and the 7% who slightly disagree with the statement.

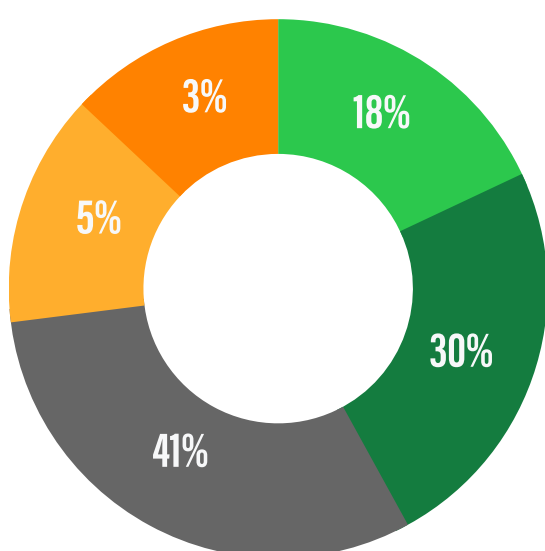
In terms of countries, UK consumers have the highest clarity with regards to plant-based terms in the fast-food sector, followed by the US and Germany.



Q9: To what extent do you agree or disagree with the following statement. "I completely understand what the plant-based or vegan labelling means in fast-food restaurants"

Fast-food businesses are urged to think about implementing clearer labeling on their products – as well as educational campaigns – in order take advantage of the shift towards plant-based eating and further increase consumer awareness of their plant-based offerings.

PERCEPTIONS ABOUT PLANT-BASED ITEMS COMING INTO CONTACT WITH ANIMAL-BASED PRODUCTS



- Very acceptable
- Somewhat acceptable
- Neutral
- Somewhat unacceptable
- Very unacceptable

Q10: What is your overall opinion on vegan patties possibly coming into contact with meat or other animal-based products in fast-food restaurant grills?

42% of consumers think that the vegan patties potentially being cooked on the same grill as meat or other animal-based products is acceptable (18% extremely acceptable + 24% somehow acceptable). A sizable majority (31%) are undecided, while 14% show some level of intolerance and 13% find it very unacceptable.

The different countries reveal different levels of acceptance about cross-contact between plant-based and animal-based food items. Germany leads, with 48% finding it acceptable, followed by the US at 43%, and the UK at 34%.

In order to reassure customers and take their preferences into account, clear and transparent labeling, as well as providing information about cooking techniques, is needed. In addition to fostering confidence and meeting a larger range of dietary requirements, creating specific preparation areas for plant-based foods could boost the dining experience as a whole, while also minimising the serious hygiene risk of cross-contamination.

WAY FORWARD

For benefitting from the shift towards plant-based eating

In summary, the above analysis provides a valuable roadmap for fast-food establishments that are seeking to tap into the surging demand for plant-based choices. By embracing these recommendations, brands can align with evolving consumer preferences while also contributing to a more sustainable and inclusive food landscape. The journey toward a future rich in plant-based offerings is just beginning, and these insights can help to empower fast-food chains to benefit from the shift towards more plant-based eating, while at the same time helping to accelerate the transformation of our food system in a more planet-friendly direction.

1. Cultivate a culture of exploration



Given the UK's greater readiness to try plant-based alternatives, we advise fast-food chains to actively introduce and market plant-based options in the country. Consumer education about the benefits of plant-based choices can further boost this trend. In the US and Germany, efforts to increase receptivity to plant-based offerings should be tailored to the unique cultural and culinary forces that shape consumer choices.

2. Boost satisfaction and positive perceptions

Germany's impressive lead in satisfaction (51%) and positive opinions (62%) about brands that offer vegan or plant-based options sets a benchmark for other markets. We encourage fast-food chains to consistently enhance their plant-based offerings in terms of taste, variety, and quality. Taking such a proactive approach is likely to raise overall customer satisfaction and foster a strong positive perception around a brand's plant-based options and plant-based food in general, while also marking the brand as one that cares about the planet and its future.



3. Harness brand visibility and recognition

With Subway and McDonald's enjoying exceptionally strong brand awareness in the German and UK markets, and Subway and Burger King holding strong positions in the US, fast-food chains can use their brand recognition to strategically promote their plant-based options, thereby boosting consumer engagement and encouraging consumers to try the new offerings. Innovative methods to increase the visibility of these products could further solidify the chains' positions as preferred locations for plant-based eating.



4. Focus on taste and affordability



Our data highlights the importance of taste and price as key purchase drivers across all three countries. We urge fast-food chains to prioritise making tasty and cost-effective plant-based alternatives available. Tapping into consumer curiosity and convenience can deepen engagement. By delivering consistently delightful and satisfying taste experiences at compelling prices, brands can enhance consumer loyalty and expand their market share.

5. Prioritize transparent labeling and cross-contact management

The high levels of understanding with regards to plant-based or vegan labeling reflects a positive trend among consumers. In order to cater to varying preferences regarding plant-based food coming into contact with animal-based products, fast-food chains should adopt transparent communication about their preparation methods. For the UK market, there is an opportunity to address the relatively lower level of acceptance of cross-contact by emphasising stringent practices that ensure the integrity of vegan and plant-based options.



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