

Market and Consumer Insights





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INTRODUCTION

The COVID-19 pandemic has changed many things, from the places we live and work, to the way we travel and socialise. While the diminishing intensity of the pandemic has meant the removal of most restrictions, there are some things that appear to have changed for good, signalling, for many people around the world, the start of a 'new normal'.

One of the many aspects of life which were shaken up by the pandemic was food and eating. So many of our food choices are made habitually – with high frequency and little reflection. When COVID disrupted almost all of our usual habits, it was a catalyst and an opportunity to change our diets.

But how and why, exactly, did people's diets change during the height of the pandemic? Have any of these changes stuck? And what do they mean for the future?



Unsplash/Jimmy Dean

In September 2022, ProVeg International surveyed a representative sample of 1,000 UK residents about their eating habits before, during, and after the pandemic. The results were conclusive: our diets have, indeed, changed, and it seems for the better.

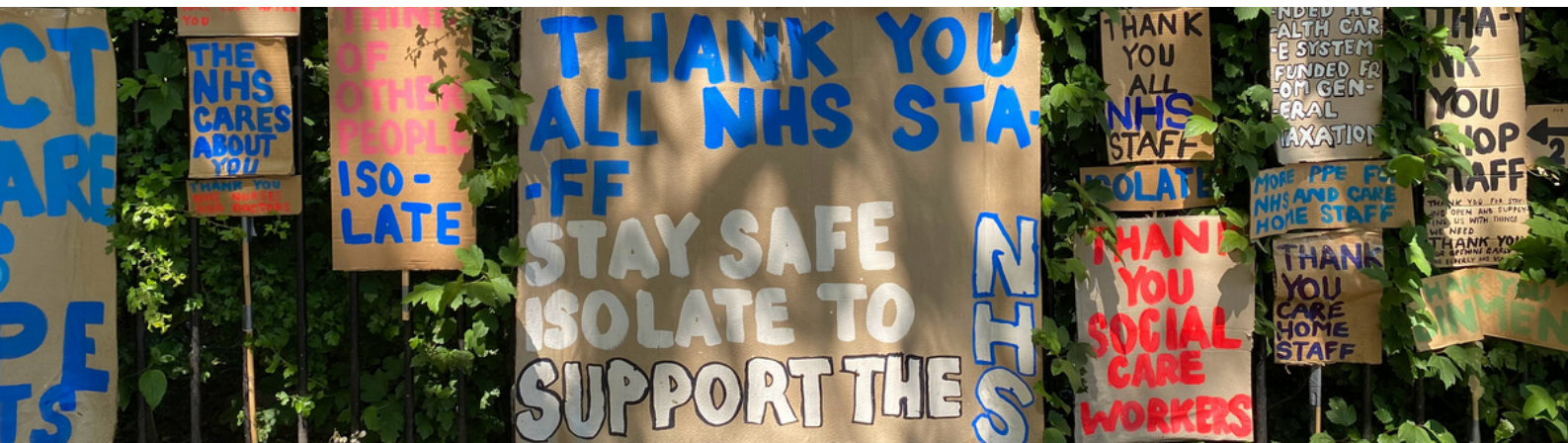
Using the results of the ProVeg survey, along with additional research and expert insights, this report assesses the impact that the pandemic has had and is continuing to have on plant-based businesses and the sector, globally. With the help of many leading plant-based businesses, we hope to gain a deeper understanding of the implications thus far and what they might mean for the future, so that we, along with other NGOs and businesses, will be better informed when we formulate proposals directed at policymakers.

Let's jump in.



PART I: THE DATA

How and why did people's dietary habits change?



At the height of COVID-19, governments around the world implemented lockdown measures to curb the spread of the disease. These regulations limited people's movements and temporarily closed schools, and businesses, as well as local and national borders. Not only did this affect *where* and *how* people could consume food – for example, consumers could no longer attend restaurants and school or work canteens – but *what* they could eat, since COVID

imposed blows on all areas of the food-supply chain, affecting farm production, food processing, logistics, and the transportation of supplies to stockists. As a direct result, consumers had to alter their purchasing habits and preferences, swapping some of their favourite foods for other options, and perhaps trying something new for the first time.

This is reflected in the survey results gathered by ProVeg. When asked how their eating patterns changed during the pandemic's peak, **46% of people agreed or strongly agreed that their habits had changed substantially**, and **39%** said they ate a greater variety of foods. More specifically, and encouragingly, **26%** agreed or strongly agreed that they ate both fewer animal-based foods and more plant-based foods during the height of the pandemic. Although the majority of respondents disagreed with these statements, we cannot discount the volume of people who altered their eating habits during COVID.

39%

...said they ate a greater variety of foods during the pandemic.

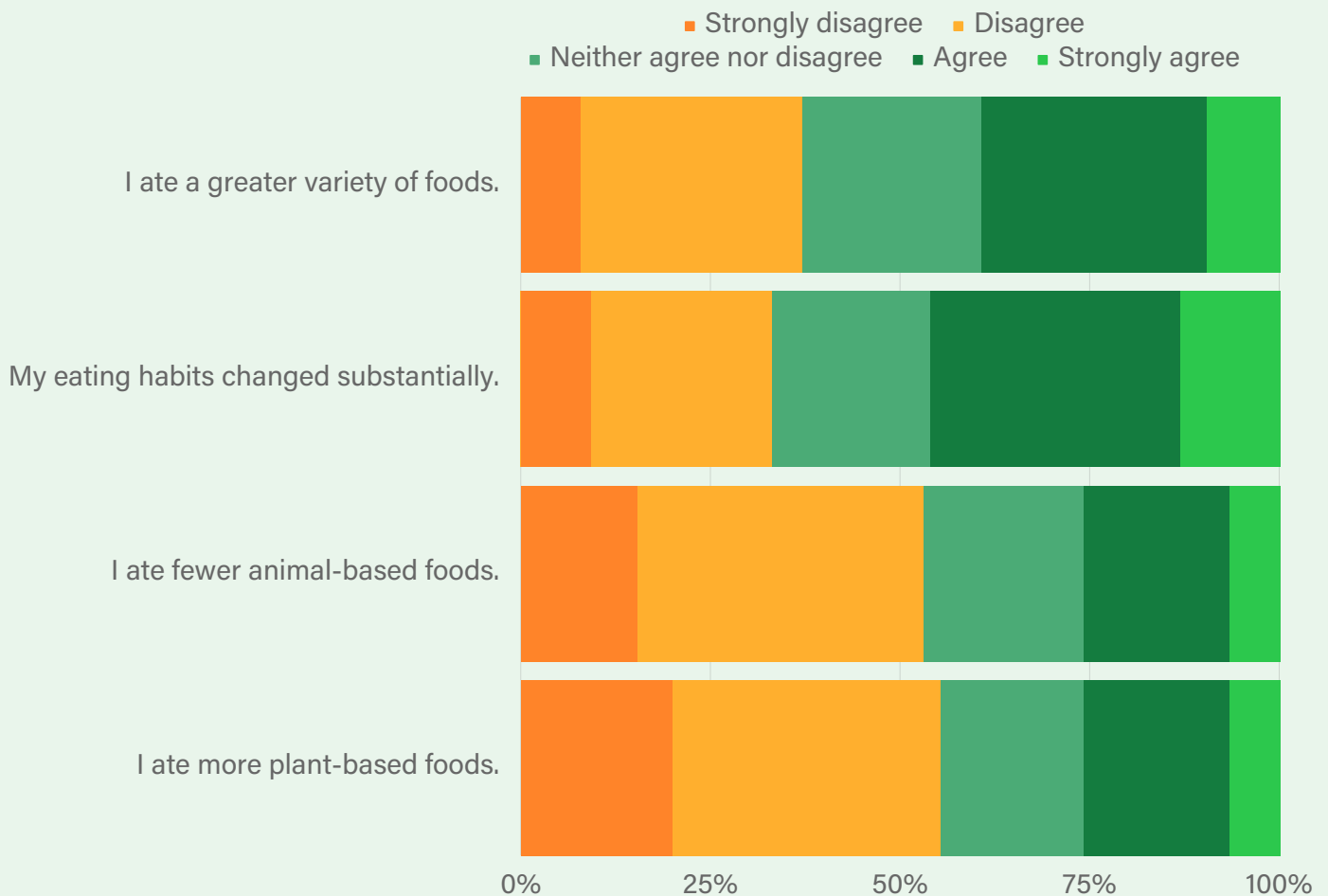
26%

...agreed that they ate fewer animal-based foods and more plant-based foods during the pandemic.

46%

...agreed or strongly agreed that their eating habits changed substantially during the pandemic.

HOW DID YOUR EATING PATTERNS CHANGE DURING THE HEIGHT OF THE PANDEMIC?



While the accessibility of foods during the pandemic affected people's dietary habits, it was not the only reason for the changes – health motivations stemming directly from the coronavirus also played a great part.

Interestingly, a mid-pandemic Veganuary poll found results akin to ProVeg's: during the pandemic, **32% more people worldwide** – not just in the UK – were eating more plant-based foods as a result of COVID. Of these, 41% stated that they were doing so because of **the link between animal farming and pandemics**. By switching from animal-based foods to plant-based options, consumers enacted a desire to prevent future outbreaks caused by similar zoonotic diseases, which jump from animal to human.



In an in-depth investigation for the School of Public Health at Imperial College London, this was explained in more detail:

"Animal farming has created conditions that make it easy for RNA viruses like COVID-19 to spread. As agriculture encroaches more on wilderness, humans come into close contact with more wildlife and so there is a heightened risk of viral species being able to infect humans."²

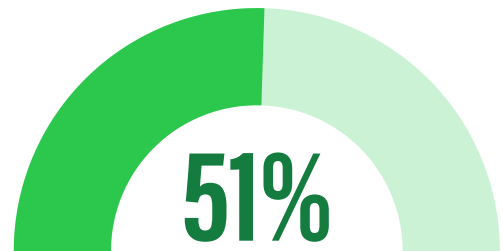
The report, led by scientists, goes on to suggest that by reforming destructive agriculture practices and the world's unsustainable food system, we could prevent the risk of future pandemics and create a more sustainable and resilient future – an idea which seems, at least in part, to have instigated people's changes in dietary habits during the UK coronavirus lockdowns.

As well as global health, **personal health** was also a factor, with people eating more plant-based foods as a means of boosting immunity during a time of worldwide health anxiety. In a pan-European (EU) consumer survey, ProVeg found that **health is one of the main drivers for plant-based purchases**. This is because a plant-based diet is associated with lower levels of cholesterol, allows consumers to avoid harmful toxins and contaminants, and can even lessen the likelihood of developing osteoporosis, some cancers, and heart diseases.³



On top of this, research by Mintel indicates there is a strong belief in the healing power of plants, with **half of Brits (51%) believing that plant and botanical ingredients can have medicinal benefits.**⁴

By opting for more plant-based (and less animal-based) foods, consumers took greater control over their own health, which seemed particularly precarious during the pandemic.



Veganuary's poll backs this up, with **73%** of those who reduced their animal-protein intake during the peak of COVID stating that they were doing so to be healthier.⁵



"Although the COVID-19 pandemic has caused more heartbreak and hardship, these results offer hope that we will embrace this opportunity to change and build a better future. Choosing a plant-based diet is one positive step each of us can take to protect our health and our planet, as well as prevent future pandemics."⁶

Toni Vernelli

VEGANUARY HEAD OF COMMUNICATIONS

Research by Mintel found another interesting factor related to habit disruption: a desire to show compassion.

Mintel Food and Drink Associate Alex Beckett explains that, for many consumers, moving to a more plant-based diet was a way of trying to help the world during a period of devastation wrought by the pandemic.

"People want the world to change for the better right now and they are searching for ways to show compassion. For consumers struggling to know how to make a positive difference, cutting out animal protein may be seen as a way of tackling the climate crisis [and] showing compassion for nature."⁷

NEW HABITS STICKING

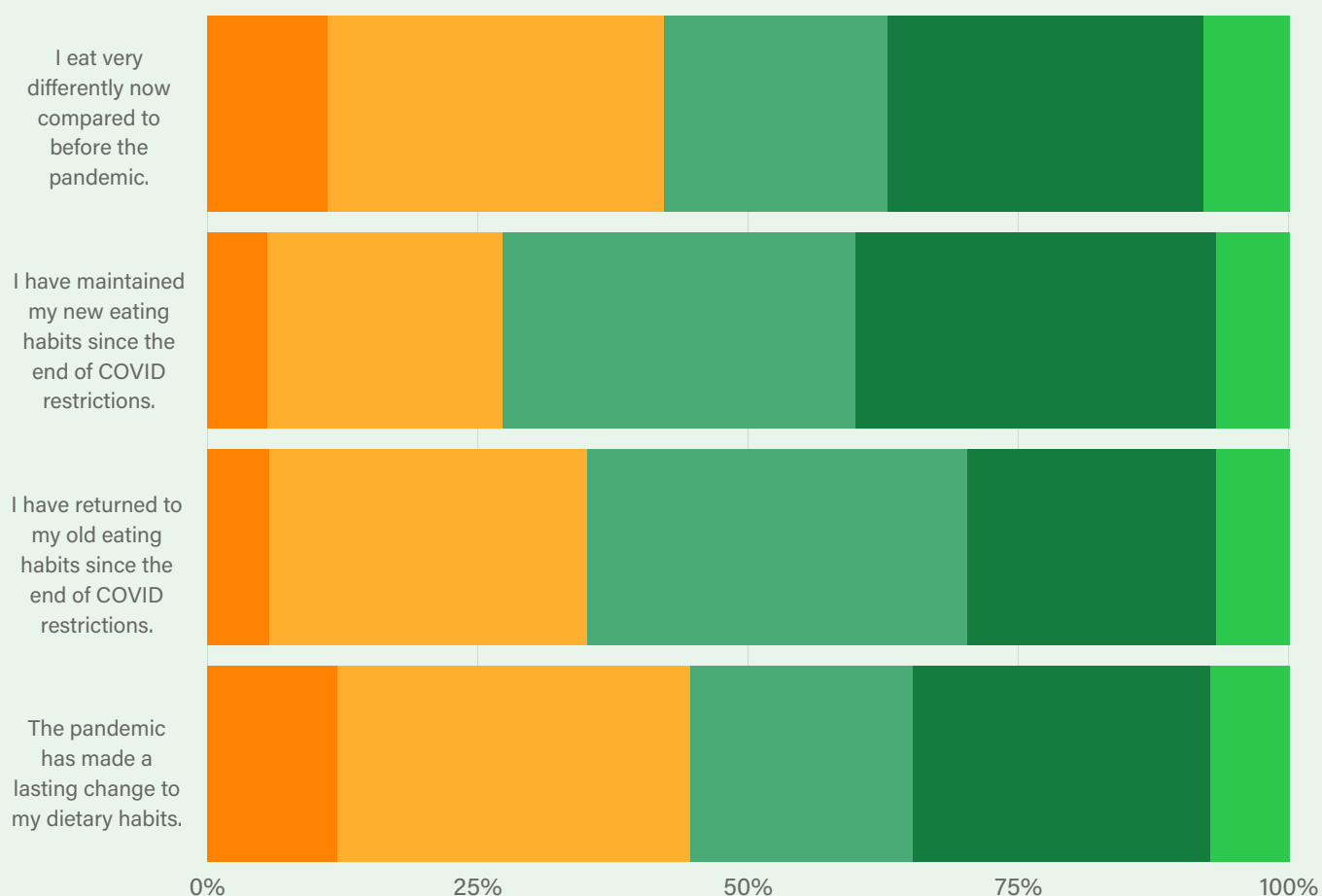
As we have seen, the pandemic did alter consumers' dietary habits. This was for a number of reasons, including availability of foods, health motivations, and a desire to enact compassion. However, did consumers stick with their reduced animal-based food consumption after COVID restrictions were lifted?

When those respondents who had made changes to their diet were asked by ProVeg about the extent to which they'd stuck to their new dietary habits, 35% of respondents said that they had made a lasting change while 37% said that they eat very differently now, compared to before the pandemic.



TO WHAT EXTENT HAVE YOU STUCK TO NEW DIETARY HABITS SINCE THE END OF COVID RESTRICTIONS?

Strongly disagree
Disagree
Neither agree nor disagree
Agree
Strongly agree



Moreover, while 41% said they had maintained their new eating habits since the end of the restrictions, just 30% said they had returned to their old eating habits. This shows a real propensity to continue eating more plant-based foods.

On top of this, 18% of people agreed or strongly agreed that they had both increased their consumption of plant-based foods and decreased their consumption of animal-based products during the pandemic. Of these people, 70% agreed or strongly agreed that they had maintained their new eating habits since the end of COVID restrictions, while only 28% agreed or strongly agreed that they had returned to their old eating habits.

The results show a definite movement towards eating more plant-based foods and a move away from animal-based products. With this in mind, the future certainly looks bright for dietary change in favour of more plant-based foods in the UK.



DIETS, THEN AND NOW

The results so far have shown that a significant number of consumers have changed how frequently they eat plant-based and animal-based foods, with the pandemic being a great catalyst for this. However, we should also ask if this shift also changed the way in which consumers identify – as omnivore, flexitarian, pescatarian, vegetarian, or vegan?

When asked to characterise their diets now, compared to before the pandemic, ProVeg found that there was no great change in the proportion of people identifying as vegan, vegetarian, or pescatarian.

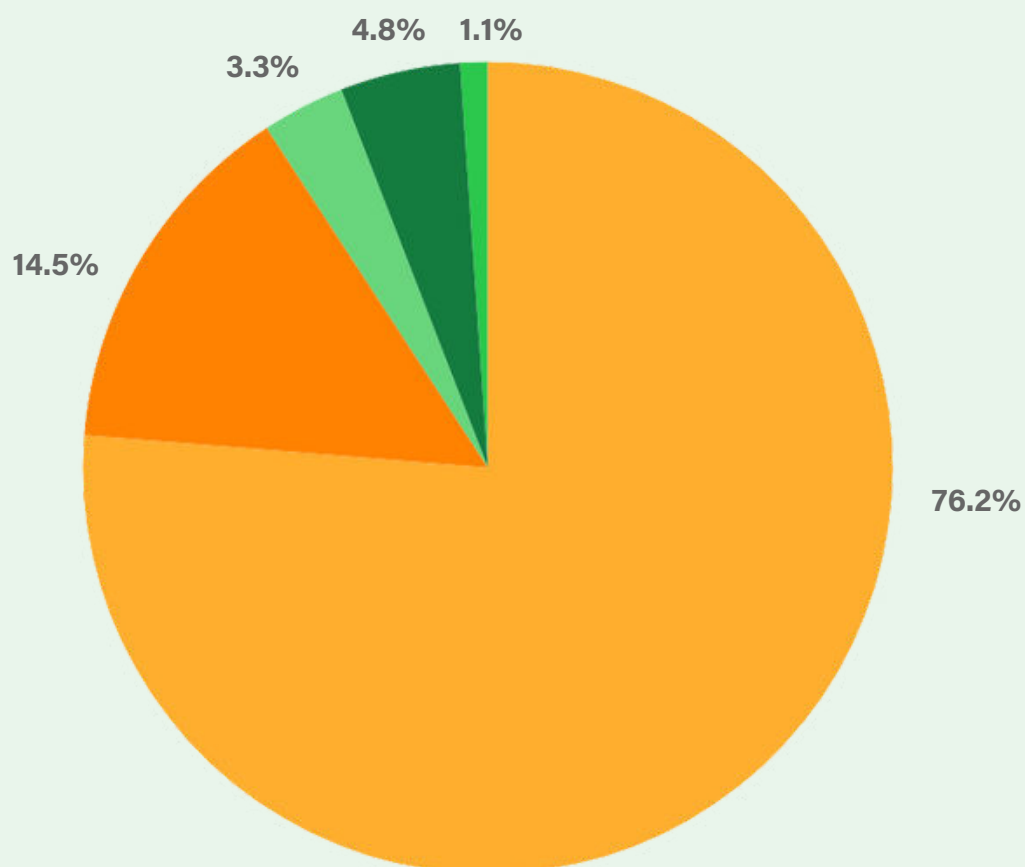
However, the number of flexitarians doubled (+16.1%), and the proportion of omnivores fell by 16 percentage points.

This reflects a lasting change in the dietary habits of a substantial number of people.

Learn more about flexitarian consumers in our in-depth article, [here](#).

HOW WOULD YOU CHARACTERISE YOUR DIET NOW, COMPARED TO BEFORE THE PANDEMIC?

■ Omnivore ■ Flexitarian ■ Pescetarian ■ Vegetarian ■ Vegan



PART II: USING THE DATA

How should businesses react to the changes in dietary habits?



Bearing in mind the increased proportion of UK flexitarians (up by 16.1%), there are considerable opportunities for plant-based industry players in the UK and Europe (with flexitarians constituting almost 30% of Europeans).

Research shows that **flexitarians are responsible for up to 90% of plant-based purchases**, meaning that they constitute the consumer demographic that is driving the plant-based sector. As such, producers and retailers of plant-based products should target their products to

flexitarians rather than vegans if they want to maximise sales and profits.

Moving away from focussing on vegan and vegetarian consumers means that businesses can reach a total audience that is more than 10 times larger! In order to do this, companies must consider all aspects of their plant-based product: packaging, marketing, pricing, and merchandising. Doing so is the most effective way to increase both sales and profit.



PROVEG TIP



Are you unsure of how to target flexitarian consumers? ProVeg is here to help. Whether you're launching a new product or want to optimise your existing marketing strategy, ProVeg has you covered. We have an extensive network in Europe in both the B2B and B2C arenas, and can create a customised marketing and merchandising strategy, or assist with product development and whitespace ideation, to help you reach your goals. Drop us a line at corporate@proveg.com to get started.



CONCLUSION

As demonstrated, ProVeg's survey of the impact of COVID-19 on diets found that **the pandemic did affect dietary habits during and after the coronavirus lockdown measures**. A significant proportion of consumers reported substantially altered eating habits, greater consumption of plant-based foods, and a reduction in animal-based products, as well as maintained dietary changes following the end of implemented restrictions.

To summarise, the survey discovered that:

26% of people ate more plant-based (and fewer animal-based) foods during the height of the pandemic.

46% of people substantially changed their eating habits during the height of the pandemic.

35% of people made a lasting change after lockdown restrictions ended.

37% of people eat very differently now, compared to before the pandemic.

41% of people have maintained their new eating habits since the end of restrictions.


18% of people both increased consumption of plant foods and decreased consumption of animal-based products during the pandemic.

Of these people, 70% have maintained their new eating habits since the end of COVID restrictions.

There was no great change in the proportion of people identifying as vegan, vegetarian, or pescatarian.

The proportion of flexitarians more than doubled, growing by 16.1%.

The proportion of omnivores fell by 16 percentage points.



If you're looking to learn how to attract more customers and grow your plant-based sales, ProVeg can help. Get in touch with us at corporate@proveg.com to talk about developing your plant-based strategy.

Unsplash/Ralph Ravi Kayden

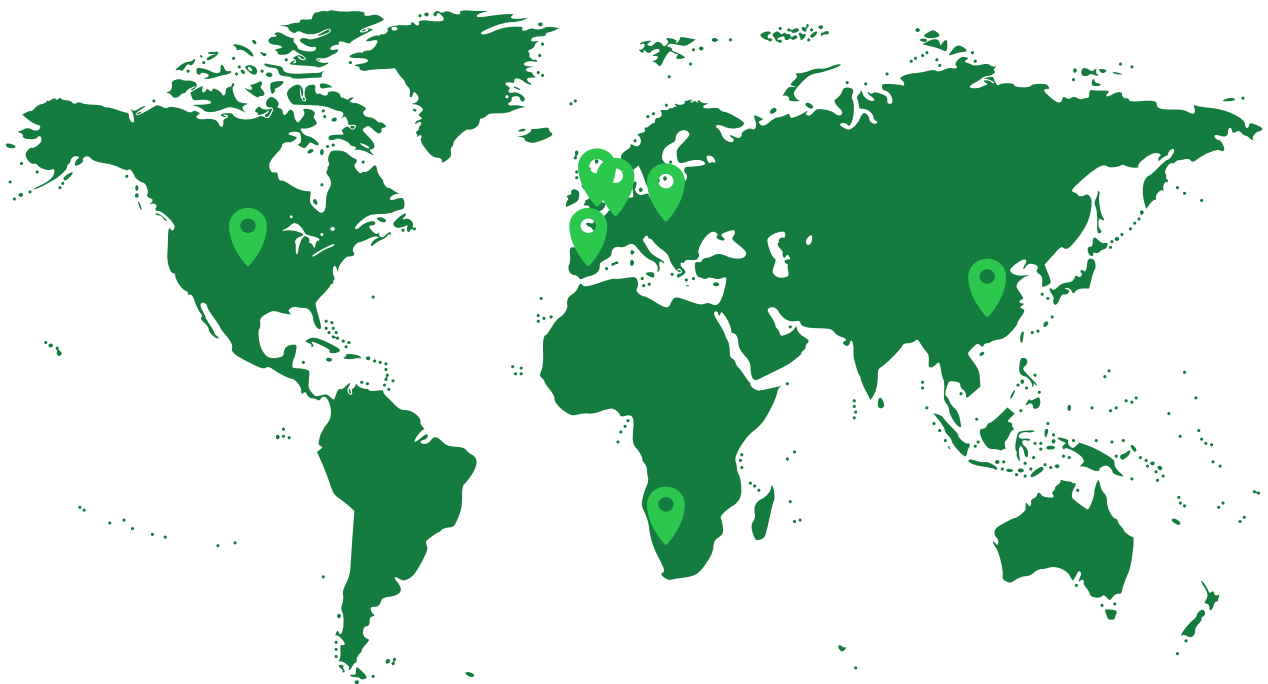
ABOUT PROVEG

ProVeg is an international food awareness organisation working to transform the global food system by replacing conventional animal-based products with plant-based and alternatives.

ProVeg works with international decision-making bodies, governments, food producers, retailers, investors, the media, and the general public to help the world transition to a society and economy that are less dependent on animal agriculture and more sustainable for humans, animals, and planet. As a leading NGO in the

alternative-protein space, we have no commercial agenda. This allows us to provide objective expert advice and help support you successfully and effectively by harnessing the power and profitability of the shift to plant-based eating, in the most appropriate way for your business.

We work with companies along the entire value chain, which gives us unique insights into the key challenges, hurdles, and opportunities at every stage of the journey as you take your product to market.



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