



Analyzing survey responses on vegan fast food



Executive summary

Did you know that the vegan food sector is projected to be worth \$162 billion by 2030? With veganism becoming more and more mainstream, we wanted to find out what people think about fast food vendors' vegan offerings and which US vegan fast-food brand is people's favorite and why.

For one, our snap survey of Americans who have eaten vegan fast food at either McDonald's, Burger King or KFC, revealed that marketing tactics around encouraging meat-eaters to try vegan food options and focusing messaging on menu items being 'plant-based' have proven most promising. Additionally, we were able to uncover that brands can appeal to Gen Z by highlighting lack of cruelty to animals. Last but not least, our survey analysis discovered that Burger King's vegan offering currently trumps that of the competition.

Audience and methodology

Our snap survey was comprised of five questions, including three open-ends:

- Which fast food restaurant has the best vegan food? (multiple choice: McDonald's, Burger King or KFC)
- 2. Please explain in as much detail as possible why you selected your answer.
- 3. What best describes your dietary lifestyle choice? (multiple choice: vegan, vegetarian, meat eater, flexitarian, pescetarian)
- 4. What's your favorite vegan fast food item? Please describe the taste and the texture in as much detail as you can.
- 5. Tell us more about any other vegan foods you'd like to see on the menu at your favorite restaurant.

Using the online survey platform Pollfish, we collected over 350 responses. As is the case with many online survey providers, Pollfish offers basic analytics relating to quantitative survey responses. This automated analysis of structured responses gave us insight into respondent demographics, dietary preferences and respondents' favorite vegan fast-food chain.



As a next step, we conducted text analysis on the open-end responses using Relative Insight. Leveraging the structured data points associated with each response to segment open-ends, we then created comparisons across different age groups, diet types and preferred fast-food vendors to understand the shape of consumer preferences.

Key insights

Meat eaters vs. vegans

When it comes to meat eaters and flexitarians, vegan fast food is all about the experience of trying something new. This is evidenced by the fact that these populations were 10.4x more likely to use words like 'try' and 'tried' when discussing vegan fast food.

Project: Vegan fast food - Burger King, McDonald's and KFC 🔹 Description: Analysis of a survey comparing what respondents thought about veg	an fast food.						
I want to learn how consumers discuss 'vegan fast food' by compared with 'meat	eaters'						
Meat eaters 'try' food Meat eaters were more likely to say that they 'tried' vegan fast food, rather than eating it regularly. meat eaters differences 10.4x more likely Words	Ģ 4	again, it has to be the impossible whopperi it might be one of the few I tried, but I highly recommend it to others. I would say it honestly tastes like a regular burger to me just with a few slight differences. Date: 17 Aug 22 Age: 19 - 24	"	burger king is the only place where I've tried the plant based burgers, I wasn't aware the other places had them.	"	there isn't really much. I'm not a fan of the stuff, just tried it. Dete: 17 Aug 22 Age: 35 - 44	"
		I don't like vegan food but tried it at md Date: 17 Aug 22 Age: 35 - 44	"				

Vegans, in contrast, stick to the food they know. They were 5.7x more likely to use frequency-based words like 'often', and they were 6.7x more likely to specifically use the word 'always'. Their go-to vegan dish is French fries.

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want to learn how consumers discuss 'vegan fast food' by compared w	ith 'meat eaters'			
Vegans have their favorites Vegans are more likely to highlight that they 'always' eat certain fast foods.		fries because fries have fries have always been my favourite	fries because I can get them anywhere and they can be made various ways. they can	the burger is very juicy and tasty as always
vegans differences 5.9x more likely	A 3	Date: 17 Aug 22 Age: 18 - 24	always be different, unlike burgers.	Date: 17 Aug 22 Age: 45 - 54
			Date: 17 Aug 22 Age: 25 - 34	
Topics x5.1 Frequency				
Words x6.7 always				



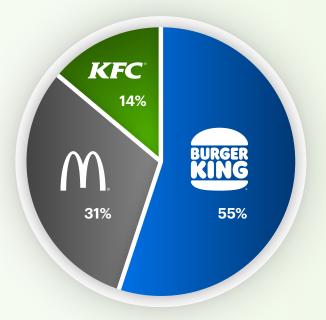
Gen Z vs. Millennials and Gen X

Gen Z's main motivation for eating vegan fast food is animal welfare, which is evidenced by the fact that they are 4.8x more likely to mention animals than Millennials and Gen X. Additionally, our survey analysis found that Gen Z has trust issues regarding fast food vendors. They were infinitely more likely to use words related to 'trust' and 'confidence' or rather the lack thereof.

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Burger King as the preferred fast-food vendor



With 55% of respondents saying that they preferred Burger King's vegan options over that of McDonald's (31%) and KFC (14%) our survey analysis revealed a clear winner among the three US fast food chains. To find out why Burger King is the people's favorite, we used text analysis to analyze the survey open-ends describing people's justifications for their selections. Analyzing the qualitative open-ends revealed that it is the Impossible Whopper that attracts people to Burger King, regardless of whether they are vegans, vegetarians or meat eaters.

What's more, respondents who voted for the chain were 10.8x more likely to use the word 'delicious', and the chain's messaging around the burger being 'plant-based' has also resonated with participants.

Project: Vegan fast food - Burger King, McDonald's and KFC 🔹 Description: Analysis of a survey comparing what respondents thought abo	out vegan fast food.			
I want to learn about the language of a data set 'Burger King answers' compa	ared with 'Not Burger King answers'			
Burger King shows vegan patties aren't impossible Survey participants who preferred Burger King highlighted that this was because of the taste of its	burger king has a plant based burger that's delicious	66 burger king has the impossible whopper and the plant based meats ar		their impossible whopper was file really tasty! was extremely similar to real beef.
burger: the 'Impossible Whopper'.	Date: 17 Aug 22 Age: 35 - 44	everything that comes w whopper	ith a	Date: 17 Aug 22 Age: 25 - 34
Burger King answers differences 7.9x more likely	A	Date: 17 Aug 22 Age: 45 - 54		
Topics x10.8 Improbability x5.7 Plants	their impossible whopper is super tastyl it's honestly a pretty good burger for someone that's vegan, though personally am not vegan or a vegetarian.			
Words x10.8 impossible Phrases co impossible whopper	Date: 17 Aug 22 Age: 18 - 24			
x4.1 impossible burger				

Respondents who voted for McDonald's or KFC as best vegan fast-food chains, on the other hand, praised the chains' strategies based on variety instead of one "hero" product as that of Burger King. They were 9.2x as likely to mention the word 'variety' and related words compared to respondents who voted for Burger King.



Relative

INSIGHT						
Project: Vegan fast food - Burger King, McDonald's and KFC * Description: Analysis of a survey comparing what respondents thought about vegan fast food.						
I want to learn about the language of a data set 'Burger King answers' compared with 'Not Burger King answers'						
McDonald's and KFC offer greater variety When compared with people who voted for Burger King's vegan food, people who selected McDonald's and KFC cite the variety of vegan food the brands offer. Not Burger King answers differences 9.2x more likely Topics x9.2 Variety Words x9.2 variety	I think Kfc provides a good variety of vegan options chicken, salads, baked beans, corr green beans Dete: 17 Aug 22 Age: 25 - 44	I selected this answer because I think that Mcdonal's has a variety of vegan foods when it comes to eating in Mcdonald's Determ 17 Aug 22 Agen 16 - 17	I think that Mcdonald's has a variety of veget foods, their salads are very good Dete: 17 Aug 22 Age: > 54			
Project: Vegan fast food - Burger King, McDonald's and KFC * Description: Analysis of a survey comparing what respondents thought about vegan fast food.						
I want to learn about the language of a data set 'Burger King answers' compared with 'Not B	urger King answers'					
McDonald's and KFC offer greater variety	I think Mcdonalds has the 66 highest quality options for the	Mcdonalds vegan options	they have more menu options. 😘			
When compared with people who voted for Burger King's vegan food, people who selected McDonald's and KFC cite the variety of vegan food the brands offer.	most part	opinion	Date: 17 Aug 22 Age: 25 - 34			
	Date: 17 Aug 22 Age: 35 - 44	Date: 17 Aug 22 Age: 25 - 34				
Not Burger King answers frequencies 🖓 3						
Words 1.1% options						

Recommendations - what does this mean for vegan fast-food brands?

With the help of the analysis of the responses to our vegan fast food snap survey, we were able to pinpoint which vegan fast food marketing tactics have proven successful, which menu items and strategies are most popular and which fast food chain is currently having an edge over the competition.

Moving forward, our recommendations for vegan fast-food brands are:

- Highlight the lack of cruelty to animals to resonate with Gen Z consumers
- Focus marketing tactics around encouraging meat-eaters to try vegan food options
- Center marketing messaging around menu items being 'plant-based'

While Burger King is currently the people's favorite, we believe that producing a product to rival the Impossible Whopper, could massively increase the popularity of McDonald's and KFC's vegan offerings.