



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:

1. 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.

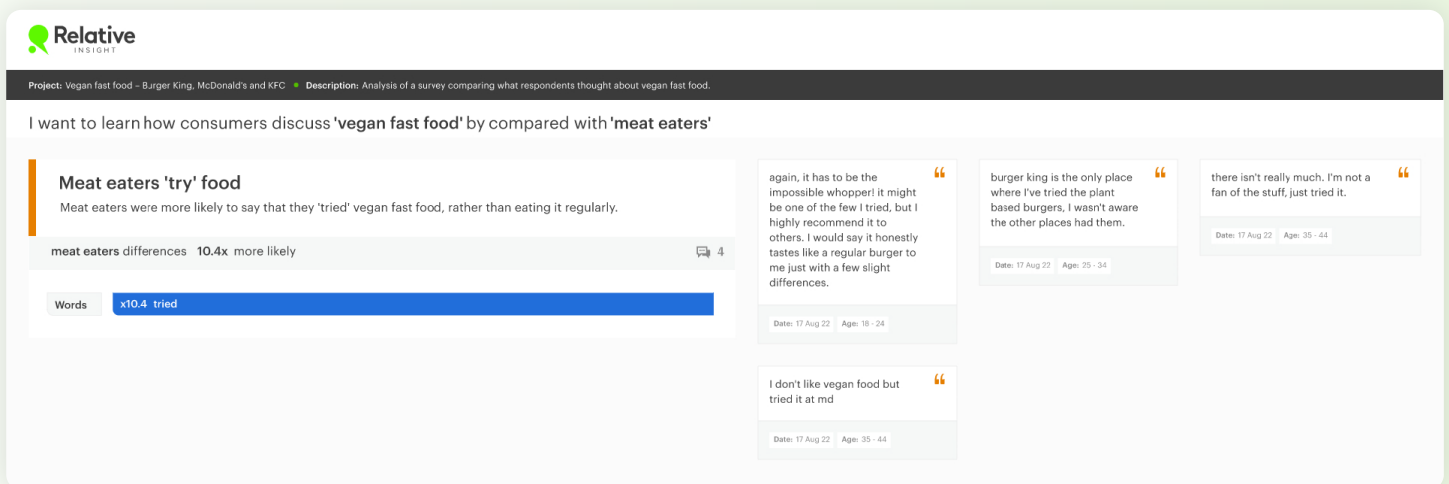
Using the online survey platform Pollfish, we collected over 350 responses. As is the case with many online survey providers, Pollfish offers basic analytics relating to quantitative survey responses. This automated analysis of structured responses gave us insight into respondent demographics, dietary 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.

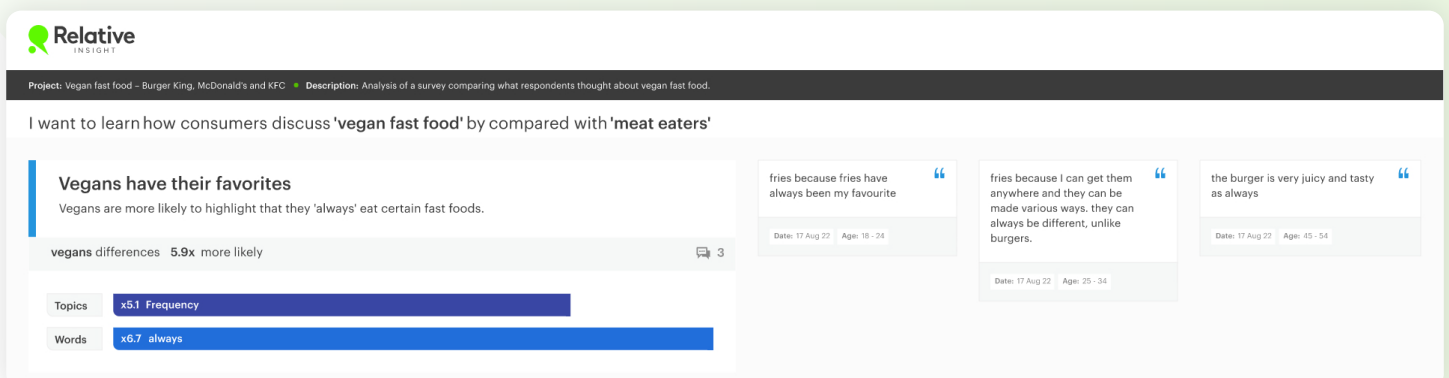
Key insights

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.

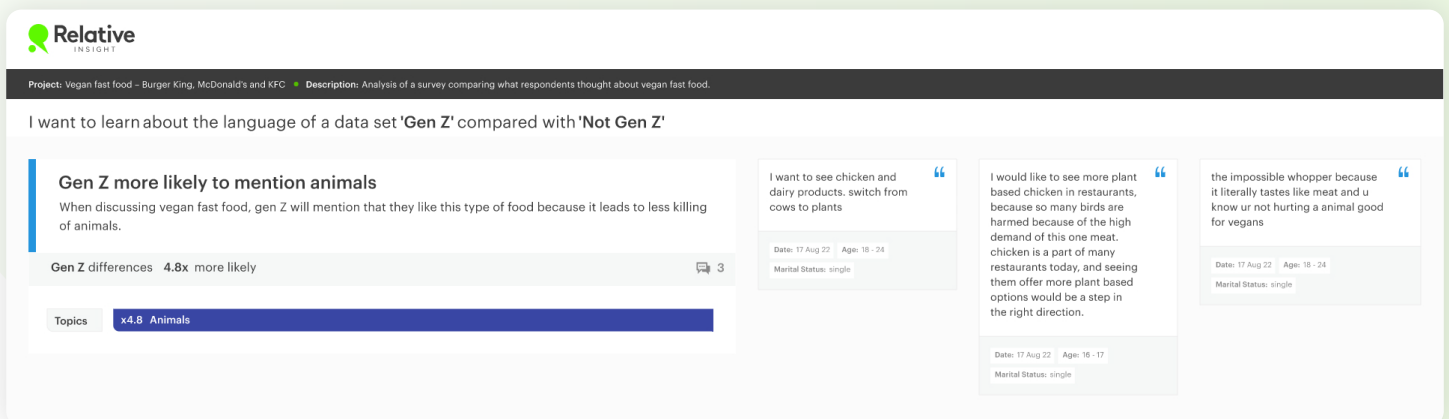
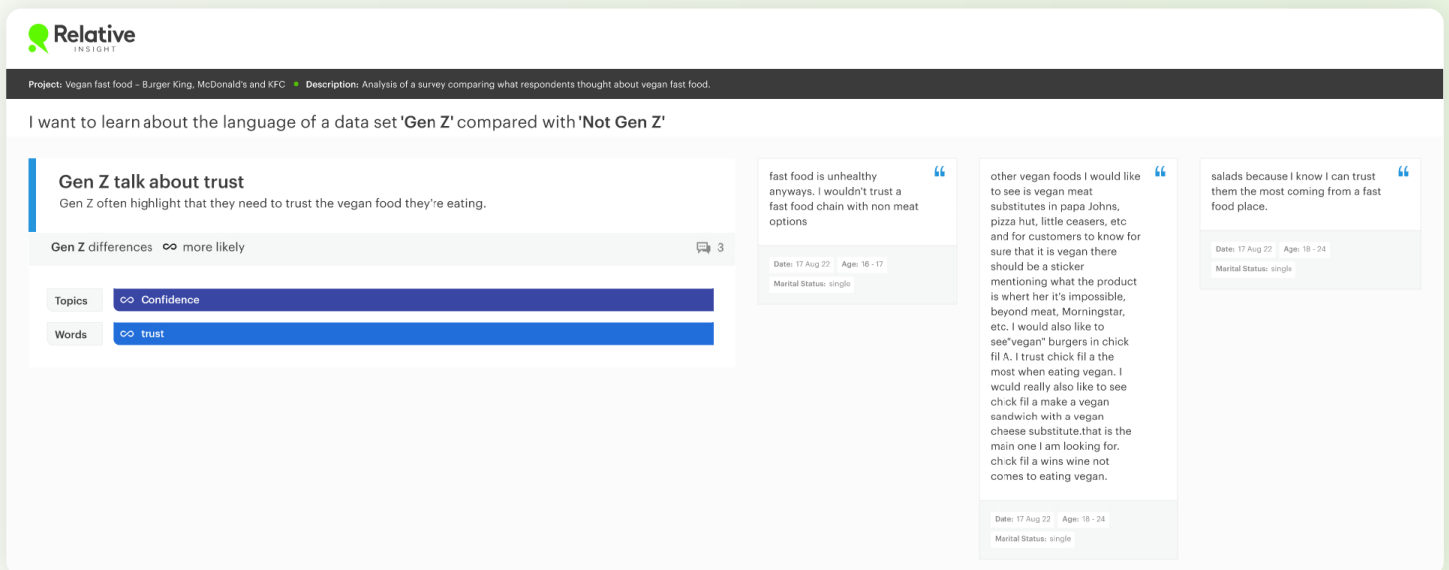


Vegans, in contrast, stick to the food they know. They were 5.7x more likely to use frequency-based words like 'often', and they were 6.7x more likely to specifically use the word 'always'. Their go-to vegan dish is French fries.

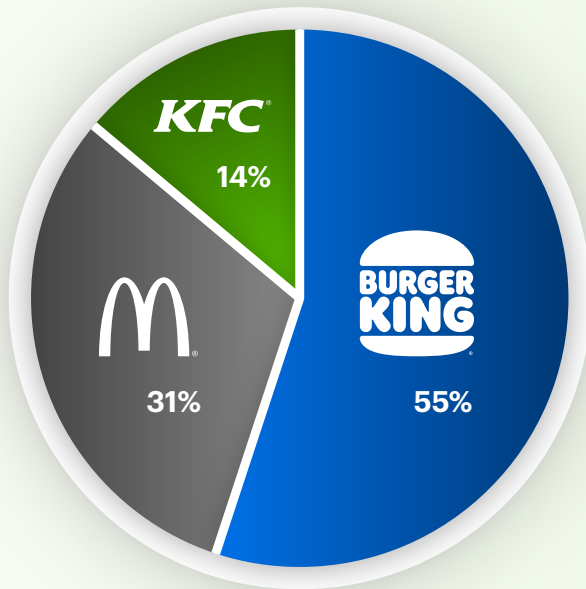


Gen Z vs. Millennials and Gen X

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.

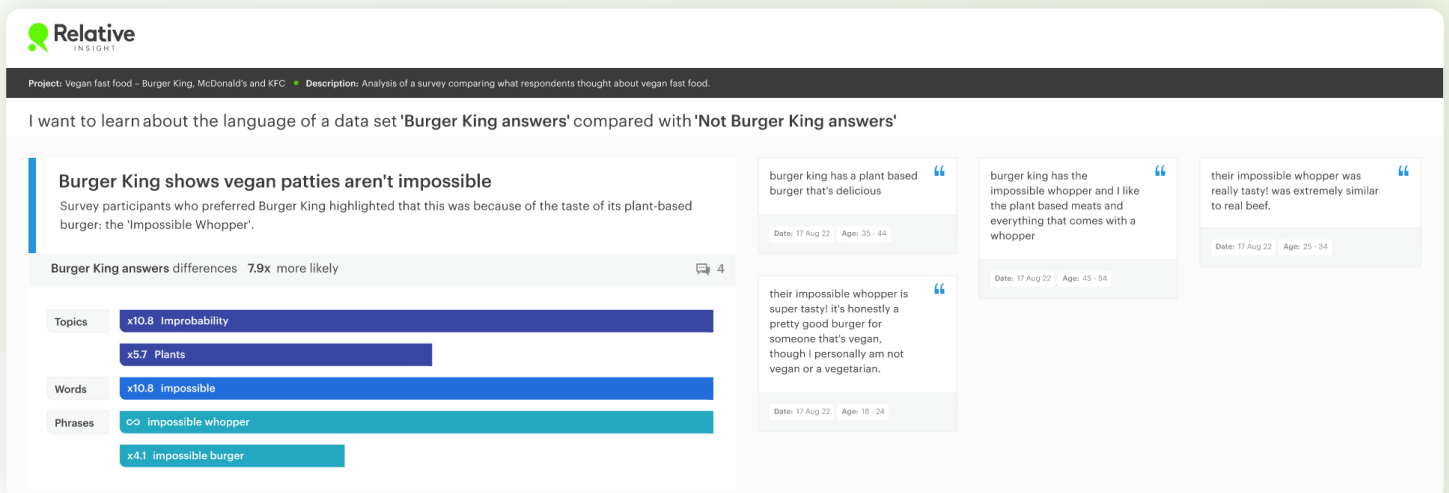


Burger King as the preferred fast-food vendor

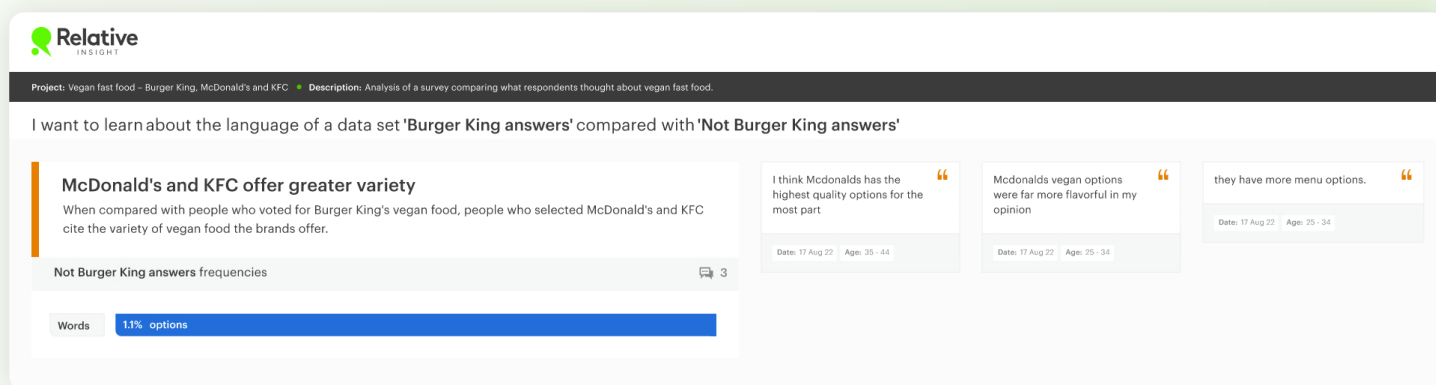
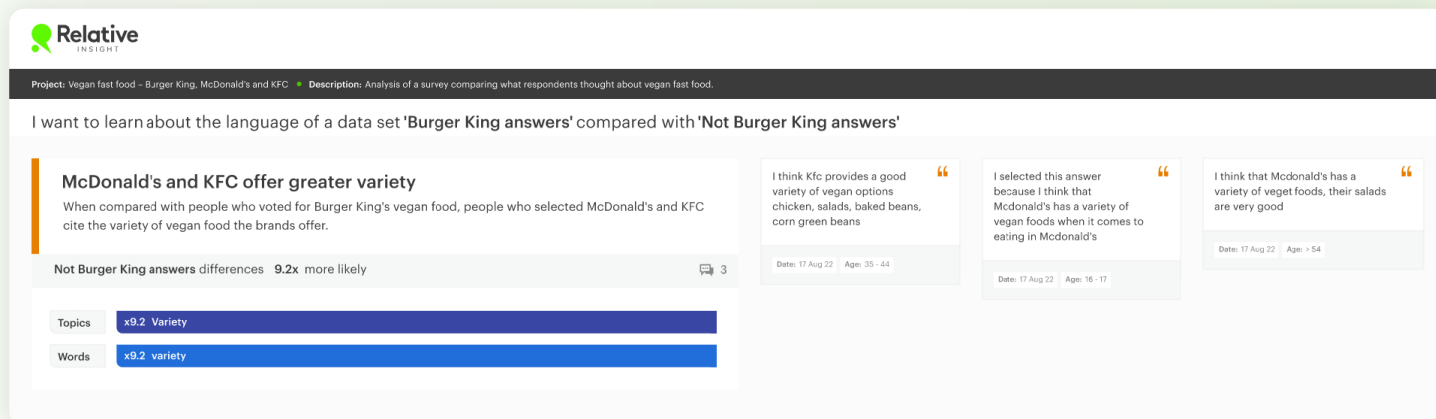


With 55% of respondents saying that they preferred Burger King's vegan options over that of McDonald's (31%) and KFC (14%) our survey analysis revealed a clear winner among the three US fast food chains. To find out why Burger King is the people's favorite, we used text analysis to analyze the survey 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.



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.



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.