Evolving appetites: An in-depth look at attitudes towards plant-based eating

Austria

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smart protein

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Top 10 key takeaways

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52% of meat consumers in Austria say that they have **reduced their yearly meat** intake.

Austria has the **second-highest share of flexitarians (37%)** of the surveyed countries, and the largest vegans segments (5%).

The primary motives for reducing meat or dairy consumption are **health (47%), animal welfare (31%), and the environment (27%).**

Austrian respondents say that they plan to substitute animal-based foods with legumes (36%), legume-based foods (34%), plant-based dairy alternatives (31%), and plant-based meat alternatives (24%).

Price (38%) and taste (26%) remain the key barriers when choosing plant-based alternatives.

54% of Austrian consumers intend purchasing plant-based alternatives from **supermarkets**, while 37% plan to buy them from **discounters**.

The most commonly requested plant-based alternatives in stores and places of consumption are **plant-based sweets and snacks** (29%), followed by **plant-based milk** (28%).

42% of Austrian respondents trust plant-based alternatives more than they did three years ago.

Austrian respondents trust plant-based alternatives due to their **accurate labelling (52%), reliability (51%), and safety (50%).**

55% of respondents would like policymakers to **enhance transparency standards in product certifications,** and support campaigns to reduce meat or dairy consumption.

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Introduction

In the Austrian plant-based retail market, there has been a notable increase in consumer demand as evidenced by a 22% growth in sales of plant-based foods between 2020 and 2022, reaching €99.6 million.[a]

Our findings underscore the **significant potential of the plant-based market in Austria**, suggesting **promising opportunities for both retail and food-service companies** to expand their plant-based product portfolios.

Furthermore, evidence from prior research shows **a substantial decline in meat consumption in Austria** since 2013. According to Statistics Austria, meat consumption has decreased from 65.1 kg to 58.6 kg over the past decade, reflecting a significant reduction of 10%.[b] The driving forces behind this decline include concerns related to health, animal welfare, and environmental impacts.

While the results of the Smart Protein survey reflect a growing interest in plant-based diets in Austria, they also show that 38% of Austrian participants find plant-based products expensive. In response to this perceived price barrier, Billa, one of Austria's largest retailers, has discounted its plant-based brand Vegavita to match or beat the prices of animal-based equivalents. In addition, Vegane Gesellschaft Österreich (the Vegan Society Austria) advocates against tax discrimination in Austria, citing the 20% tax rate on plant-based milk compared to cow's milk (10%).[c] Spar, Another Austrian retail giant, has seen sales of its plant-based private label line more than double over the past five years, growing by 24% in 2023 alone.[d] This **reflects a broader European shift towards promoting affordable and accessible plant-based options**.

As we look ahead towards the coming years, these positive outcomes align with the overarching trends identified in the Smart Protein consumer survey, **suggesting a promising trajectory for the plant-based market in Austria** which reflects **the global shift towards more plant-centric lifestyles**.

a) GFI (2022): Austria plant-based food retail market insights.
https://gfieurope.org/wp-content/uploads/2023/04/2020-2022-Austria-retail-market-insights_updated.pdf.
b) Vegan Society Austria (2023): Tierprodukte am österreichischen Markt immer unbeliebter. https://www.vegan.at/versorgungsbilanzen-neu.
c) Vegconomist (2023): Yet Another EU Retailer Drops Vegan Prices as BILLA Makes "Plant-Based Possible for Everyone".
https://vegconomist.com/retail-e-commerce/billa-drops-vegan-prices/.
d) Vegconomist (2024): Österreich: Umsatz von SPAR Veggie in fünf Jahren mehr als verdoppelt.
https://vegconomist.de/handel-e-commerce/oesterreich-umsatz-von-spar-veggie-in-fuenf-jahren-mehr-als-verdoppelt/.

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Survey

- Conducted online by Innova Market Insights.
- 20-minute-long questionnaire.
- Conducted in June 2023, as a follow-up to the previous survey conducted in June 2021, the results of which are used in this report to compare changes in behaviours and attitudes over the last two years.
- Countries covered by the research: Austria, Germany, Spain, France, Italy, the United Kingdom, Denmark, Poland, Romania, the Netherlands.

Participants

- 750, all over the age of 18.
- 20% of participants in each age group:
  - 18-24 years old
  - 25-34 years old
  - 35-44 years old
  - 45-54 years old
  - 55-70 years old
- 49,6% men, 49,7% women and 0,7% other.
- Only consumers who are responsible for household grocery shopping participated.

4 key changes compared to 2021

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In comparison to the results of the 2021 report,[1] four key developments in Austria are evident:

No 1. In 2021, 48% of Austrian consumers reported a decrease in their yearly meat intake.[2] In 2023, it increased to 51%.

No 2. In 2021, 56% of respondents said that they followed an omnivore diet. In 2023, this decreased to 48%. The number of vegans increased from 2% in 2021 to 5% in 2023.

No 3. Concerns about the affordability of plant-based alternatives[4] are more prominent in 2023 than they were two years earlier, with cost now ranking as the most significant barrier to following a plant-based diet.

No 4. 42% of respondents in Austria said that they trust plant-based alternatives more than they did three years ago.

1) 'What consumers want: A survey on European consumer attitudes towards plant-based foods.
2) Omnivore – I frequently eat meat (such as beef, pork, chicken, turkey, fish and/or shellfish)
3) Flexitarian – I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead
4) Products made solely from plant-based ingredients and are developed to resemble conventional animal-based foods such as meat or dairy. (Exam

Consumer attitudes & behaviours towards plant-based foods

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Meat consumption: behaviours and attitudes

Meat consumers in Austria have shown notable shifts in their consumption of meat and dairy,[5] with **52% having reduced their meat intake compared to the previous year**. 15% of meat reducers have significantly decreased their consumption – by 50% or more – while 36% have made reductions that fall below the 50% threshold. 41% report no changes in their levels of meat consumption, while 8% say that they have increased their meat intake. Beef and pork have seen the most substantial reductions, accounting for 26% and 37%, respectively, among the choices provided. Changes in consumption of other animal-based products are marginal, with less than 6% of meat or dairy consumers reporting notable changes. **The primary motive behind the reduction in meat or dairy consumption is health**,[6] with 47% of respondents citing it as their leading reason. Following closely behind, 31% of people expressed concerns about animal welfare, while 27% highlighted environmental impacts as their primary motivation.

Compared to the total European sample, Austria shows a slight deviation from the average in certain aspects. 37% of Austrian consumers are reducing their rate of pork consumption, which is 6% more than Europe as a whole. Additionally, 10% of Austrian consumers have reduced their milk consumption, which is significantly higher than the overall European figure of 6%.

Dietary lifestyles in Austria

Compared to 2021, Austria stands out as one of the few countries showing a **notable decrease in the number of omnivores**, as well as a **substantial increase in the number of vegans**. Currently, 48% of Austrian respondents identify as omnivore (8% less than in 2021), 37% as flexitarian, 5% as pescatarian, 5% as vegetarian, and 5% as vegan.

When asked about the duration of their selected dietary lifestyle,[7] **49% of Austrian consumers say that they have been following a flexitarian diet for more than two years,** while 39% have been following a pescatarian diet, 34% a vegetarian diet, and 11% a vegan diet for a similar period.

	2021	2023	% change
Omnivore	56	48	-8
Flexitarian	35	37	+2
Pescatarian	2	5	+3
Vegetarian	5	5	0
Vegan	2	5	+3

Q3: Which category best describes your current dietary lifestyle? (AT n=750)

5) Compared to a year ago, how much meat (e.g. beef, pork, chicken) are you eating now? | Single choice
6) Which of the following reasons best describe why you have chosen to decrease your consumption of meat or dairy products? | Multiple choice
7) How long have you been following your current dietary lifestyle? | Single choice

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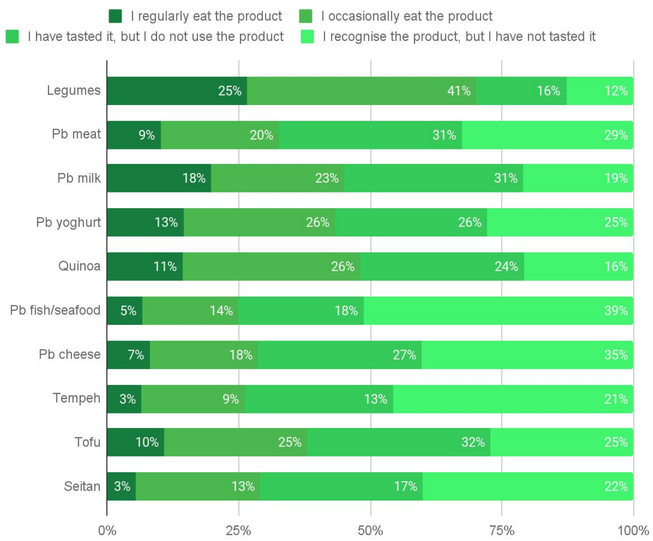
Familiarity of plant-based foods*



Q6 How familiar are you with the following food products? (AT n=750)

Legumes rank as the most-familiar plant-based food in Austria, with 65% of respondents reporting regular or occasional consumption, followed by plant-based milk (41%), plant-based yoghurt (39%), and quinoa (37%).

In terms of future behaviours, **36% of respondents are likely to substitute animal-based foods with legumes**, while 33% are likely to do so with legume-based foods, and 31% intend opting for plant-based dairy alternatives. These percentages are much lower than in the other European countries surveyed, highlighting the need to enhance the appeal of plant-based options in Austria.

Market opportunities for plant-based alternatives

Top 5 drivers when purchasing plant-based alternatives[8]

1. Taste (55%)
2. Affordability (48%)
3. Health (42%)
4. Freshness (31%)
5. Environmentally friendly (23%)

Top 5 barriers when purchasing plant-based alternatives[9]

1. Too expensive (38%)
2. Not tasty enough (26%)
3. Don't want to change routine (26%)
4. Worried about health (26%)
5. Need more information (22%)

Compared to 2021, taste remains the main motivator for consumers when choosing plant-based alternatives, while **affordability increased in significance as a key motivator**. Concerns about freshness declined, while there was an increase in **health-related concerns about plant-based products**.

When it comes to purchase location,[10] 54% of Austrians are most likely to buy plant-based alternatives at supermarkets, followed by discounters (37%) and organic supermarkets (22%). Austria stands out with a particularly high share of consumers shopping at drug stores (17%). In terms of consumption location,[10] **62% of respondents are most likely to consume plant-based alternatives at home**, while 22% consume them in conventional restaurants, 14% in plant-based restaurants, 12% rely on online orders or takeaways, and 7% consume them at school or in work canteens. In terms of the variety of plant-based products available,[11] **29% want to see more plant-based sweets and snacks** (such as chocolate, chips, and cookies), followed by more plant-based milk (28%).

8) What are the most important factors when choosing plant-based food alternatives? It is important to me that the plant-based food alternatives I chc
9) Which of the following do you encounter as barriers when choosing plant-based food alternatives?| Multiple choice (max 5).
10) Where are you likely to purchase/consume plant-based food alternatives most frequently in the future? |Multiple choice.
11) What kind of plant-based food alternative(s) do you wish you could buy more often in the supermarket or at points of consumption (e.g. restaurants, cafes, etc.)? |Multiple choice.
*Pb= plant-based // Legumes (e.g. lentils, chickpeas) Pb cheese (e.g. sliced/grated cheese) Pb fish/seafood (e.g. fish sticks/tuna) Pb meat (e.g. burgers/sausages) Pb milk (e.g. soy/oat milk Pb yoghurt (e.g. soy/oat yoghurt)

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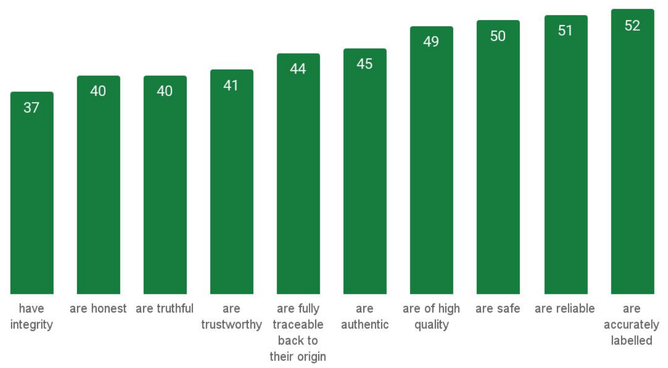
Trust levels towards alternative proteins

Austrian consumers trust plant-based protein sources such as cereals and pulses the most, followed by fungi (e.g., mushrooms, mycelium, yeast) and cultivated protein (e.g. cultivated meat and dairy). They trust insect-based protein the least, followed by algae-based protein.[12] Compared to 2021, plant-based proteins have gained the most momentum. **42% of respondents say that they trust plant-based alternatives more than they did three year ago**,[13] while 35% are neutral on the matter. Conversely, 18% trust plant-based alternatives less, and 5% are uncertain about their opinion.



Q20: I trust that plant-based food alternatives... | Single choice | Total agreement level (Strongly agree + Agree + Somewhat Agree) (FR n=750)

Plant-based proteins are trusted for their **accurate labelling (52%), reliability (51%), and safety (50%)**. However, aspects related to integrity, honesty, and truthfulness, garnered less than 40% agreement and could be further leveraged to strengthen consumer confidence in these products. Enhancing efforts in these areas could bolster consumer confidence and promote a deeper sense of trust and reliability in these products.

The media and online influencers

In terms of the perceived quality of information in mainstream Austrian online media, there are significant opportunities for improved leverage. Compared to the other countries, Austrian consumers show the lowest level of trust in media, highlighting the urgent need to improve the quality of information provided. Our findings reveal that **50% of people use social media for updates on discounts and promotions on food products**, while 36% say that food content on social platforms stimulates their appetite. Additionally, 30% said that social media has an influence on what they buy and eat, as well as on their perceptions of specific products.[15]

Ranking of online medias, by trustworthiness of information:[14]

1. Health and/or nutrition society websites
2. Search engines (e.g. Google)
3. Online collaborative projects (e.g. Wikipedia)
4. News websites
5. Online videos (e.g. Youtube)
6. Government websites
7. Food-company websites
8. NGO websites
9. Online blogs
10. Social-networking sites (e.g. Facebook, Instagram, Pinterest)
11. Online forums (e.g.Reddit)

12) Which of the following alternative proteins do you trust the most? Rank them from 1 (trust the most) to 5 (trust the least). | Single choice
13) When thinking about your overall knowledge and experience with plant-based food alternatives, has your current trust increased or decreased in comparison to three years ago? |Single choice.
14) In general, how much do you trust information about plant-based food products from...| Single choice.
15) Please indicate how much you disagree or agree with each of the following statements concerning social media and food attitudes.| Single choice.

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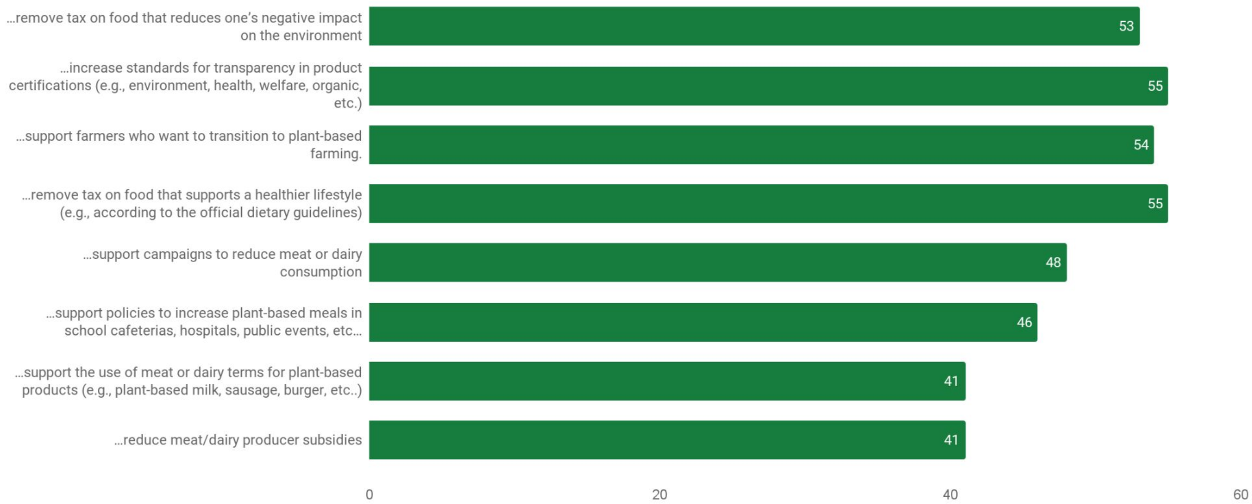
Opinion on policy



Q22: In your opinion, how much do you agree or disagree with the following statements regarding the actions that policymakers should take? I believe that my government should… | Single choice | Total agreement level (Strongly agree + Somewhat agree + Agree) (AT n=750)

Austrian respondents are generally in favor of tax exemptions on foods that have a lower environmental impact (53%), while 55% support enhanced standards for transparent product certifications. Another 54% agree with supporting farmers who want to transition to plant-based farming, while 55% think that policymakers should remove taxes on foods that support a healthier lifestyle. Notably, Austria has the lowest endorsement of political action compared to other European countries, possibly due to a lack of trust in information. This highlights the **importance of clear communication, education, and open discussions when it comes to building trust**.

What trends are likely to shape the future of the plant-based market in Austria?

"Supermarkets are taking the lead together with progressive manufacturers to set new standards in the plant-based assortment. Currently there is a big focus on offering the best taste experience at the best possible price point. In the future this basis will be extended with a stronger focus on local ingredients and production as well as clean label formulations with new ingredients. In addition there will be more plant-based products as standard options as unnecessary animal ingredients will be removed. All retailers and manufacturers will finally choose attractive "plant-based messaging" to reach a wider target group."

Verena Wiederkehr
Head of Plant-Based Business Development, Billa AG

Conclusions & recommendations

Austria

Conclusions:

1. **Dietary shifts and motivations:** The consumer landscape in Austria shows a noticeable shift away from meat and dairy consumption, driven largely by health concerns (47%), animal welfare (31%), and environmental awareness (27%).
2. **Dietary lifestyles are evolving:** The number of omnivores has decreased (48%, compared to 56% in 2021), while more individuals now follow a vegan diet (5%, compared to 2% in 2021).
3. **Consumer preferences and challenges:** Taste remains a pivotal factor when choosing plant-based alternatives, while rising concerns about affordability pose a significant challenge. Consumer concerns about health implications and changes in routine also remain prominent.
4. **Consumer trust:** Austrian consumers report lower levels of trust in plant-based protein sources, compared to other European countries. While accurate labeling, reliability, and safety are viewed positively, improving integrity, honesty, and truthfulness is essential for building and enhancing consumer confidence in these products.
5. **Social influencers:** Social media has a significant influence on consumer behaviour.
6. **Government initiatives:** Austrian consumers strongly support government initiatives that promote healthier and more environmentally friendly food choices.

Recommendations:

1. **Promote health benefits:** Educate consumers on the health advantages of plant-based diets through collaborations with educational institutions and community organisations.
2. **Implement a transparent labeling strategy:** Ensure that product labeling is clear and accurate, including third-party certifications, in order to increase trust in plant-based products. Seek third-party certifications from reputable organisations that verify the authenticity and quality of your products.
3. **Expand your targeting of plant-based products:** Tap into the strong motivation of people avoiding meat by expanding the variety of plant-based alternatives in order to appeal to different demographics and occasions.
4. **Improve social media data quality:** Improve the quality and reliability of information shared on social media, while maintaining engaging content. Share success stories, recipes, and tips on making sustainable food choices.
5. **Support public-private partnerships:** Foster partnerships between government, businesses, and nonprofits in order to collectively advance the credibility and sustainability of plant-based products and initiatives.

THE FUTURE OF PLANT-BASED EATING IN EUROPE

Regional variations

%	AV.*	DK	DE	IT	RO	FR	NL	SP	UK	AT	PL
Meat consumers who say that they have reduced their annual meat intake	**52**	48	59	59	48	58	49	48	48	52	48
Consumers who say that they follow a flexitarian, vegan or vegetarian diet	**38**	33	55	31	35	35	47	31	38	52	26
Consumers who say that they eat plant-based foods regularly or occasionally	**36**	36	33	40	37	35	35	39	34	32	36
Consumers who are willing to increase their consumption of plant-based foods	**38**	41	36	45	40	34	33	43	37	31	37
Consumers who cite taste as a barrier	**30**	29	30	26	30	33	31	28	37	26	30
Consumers who cite price as a barrier	**38**	29	39	35	36	40	37	41	43	38	39
Consumers who trust plant-based alternatives more than they did three years ago	**46**	49	42	57	45	37	41	45	49	42	48
Consumers who support policies to increase consumption of plant-based meals	**57**	52	49	64	63	52	53	69	64	46	57
Consumers who support campaigns to reduce meat consumption	**54**	54	51	60	57	53	49	59	57	48	55

AV.: Survey Average
Green: % equal or above survey average
Yellow: % below survey average

*Average, Denmark, Germany, Italy, Romania, France, Netherlands, Spain, the United Kingdom, Austria, Poland

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Imprint

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The **Smart Protein project** is a €10-million, EU-funded project that seeks to develop a new generation of foods that are cost-effective, resource-efficient, and nutritious. Alternative-protein sources, such as legumes and side-streams from beer and pasta production, are used to generate plant-based ingredients as well as plant-based meat, seafood, dairy products, and baked goods.

ProVeg International is a food awareness organisation working to transform the global food system by replacing 50% of animal-based products with plant-based and cultured alternatives by 2040. ProVeg works with decision-making bodies, companies, investors, the media, and the general public to help the world transition to a society and economy that are less reliant on animal agriculture and more sustainable for all humans, animals, and our planet. ProVeg has offices in 12 countries across four continents and is active around the world. ProVeg has permanent observer status with the UNFCCC, special consultative status with ECOSOC, is accredited for UNEA, and has received the United Nations Momentum for Change Award.

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