Are British Shoppers Going Vegan?
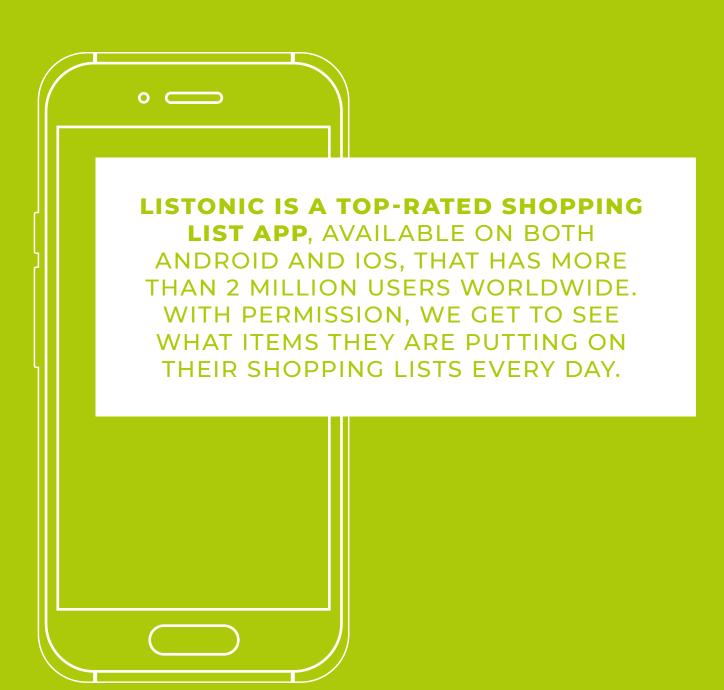
Vegan and
Non-Vegan trends

British Shopping Lists
2014-2018

Listonic

Introduction

LISTONIC IS A TOP-RATED SHOPPING LIST APP, AVAILABLE ON BOTH ANDROID AND IOS, THAT HAS MORE THAN 2 MILLION USERS WORLDWIDE. WITH PERMISSION, WE GET TO SEE WHAT ITEMS THEY ARE PUTTING ON THEIR SHOPPING LISTS EVERY DAY.

Listonic

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Method

We took shopping list data from our UK users over 5 years from 2014 - 2018, detailing the names of items they have been putting on their shopping lists and the categories these come under.

WE LOOKED FOR:

Frequency of appearance of brands, products, and keywords relating to veganism.

% of shopping lists vegan products take up on shopping lists compared to non-vegan.

Trends in the difference between the % of vegan and non-vegan products year by year.

Trends in the difference between the % of vegan and non-vegan products month by month.

Conclusions

1 **LISTONIC'S UK USERS AREN'T GOING VEGAN, BUT ARE BECOMING MORE FLEXITARIAN**

There has been a steady increase in the number of vegan products, compared to the number of non-vegan products, on users' shopping lists since 2016. However, non-vegan products, such as meat and dairy, have not significantly decreased to the same effect.

This shows that whilst vegan products are being embraced, British shoppers are reluctant to give up their meat, eggs, and dairy, and are instead turning to flexitarianism.

2 **VEGANUARY ONLY HAD AN IMPACT ON USERS' SHOPPING LISTS RECENTLY**

A spike in the amount of vegan products in January is only evident in 2018. During 2014-2017, the summer months saw the biggest increase in the % difference between vegan and non-vegan products, not January.

3 **ALMOND MILK IS THE UK'S FAVOURITE DAIRY MILK ALTERNATIVE**

Almond milk is 47% more popular than soy milk among UK users.

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01 Introduction

Veganism is currently a growing topic in the UK. This is partly being stoked by the environmental crisis, which is seeing people become more aware of the sustainability and environmental impact of certain sectors of the food industry; particularly the meat and animal product sectors.

There have also been several high-profile vegan food launches in the UK, such as Gregg's vegan sausage roll, and KFC's vegan burger. January 2019 also saw vegan campaign, "Veganuary", officially involving ¼ million participants.

All this has meant that veganism has become far more visible in the public eye than ever before.
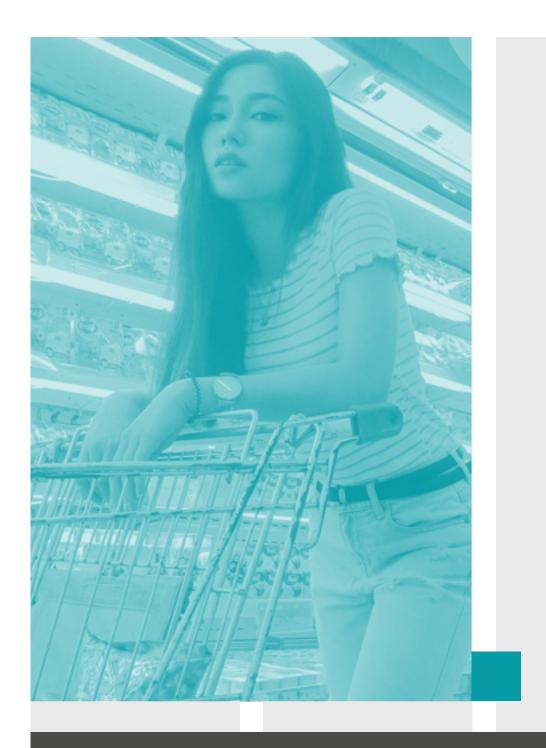
BUT IS THIS HAVING AN AFFECT ON THE COMPOSITION OF BRITISH SHOPPING LISTS?

Our app, Listonic, is one of the top-rated and most download shopping lists apps on both Android and iOS. With permission, we're able to see what items users are putting on their lists. Therefore, we are in a key position to determine any trends towards veganism among our British users.

We also wanted to look to see if campaigns to make people consider switching to veganism are having any effect. The most well known of these is Veganuary, where people are challenged to go the whole month of January without eating any meat or animal products.

Therefore, if Veganuary is an effective campaign, we should see a spike in the % difference between vegan and non-vegan products on users' lists in January.

If the people in the UK really are turning vegan, then we should:

1 See vegan products take up an increasing % of shopping and non-vegan products take up a decreasing %

2 See an increase in the % difference between vegan and non-vegan products on shopping lists

02 Analysis

Differences Between Number of Vegan and Non-Vegan Products (Yearly)

Methodology

Veganism is the rejection of any products that have been made from or from the exploitation of animals. The two categories within the Listonic app that wholly comply with veganism's parameters are "Produce" and "Pasta & Grains". Conversely, the only categories in Listonic that wholly contain non-vegan food are "Meat" and "Dairy Products".

The reason the data was confined to only these four categories is that other categories contain many vegan and non-vegan products i.e. "Canned food" includes meat as well as vegetables.

Instead of comparing the frequency of items within the categories directly, we looked at the % difference between these frequencies per year. This was worked out by taking the yearly total of vegan products (V), subtracting the yearly total of non-vegan products (NV), and then dividing that by the sum of both totals.

$$N=(V-NV)/(V+NV)$$

V - yearly total of vegan products

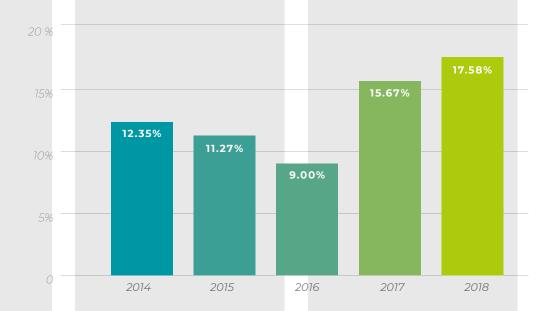**NV -** yearly total of non-vegan products

SINCE 2016 USERS HAVE STARTED TO ADD MORE VEGAN PRODUCTS TO THEIR SHOPPING LISTS

By comparing the % difference between the 2 categories, we're able to account for any influxes in product frequencies that are caused by the growth of the app's user base or increased seasonal use. E.g. We tend to have significantly more users using the app between October and December because of winter holiday shopping.

The bigger the % gap, the higher the number of vegan products are being bought in comparison to non-vegan. A negative % difference would mean that non-vegan products outnumber vegan products.

Percentage Difference between Frequency of Products in Vegan to Non-Vegan Categories per Year

Year	Value
2014	12.35%
2015	11.27%
2016	9.00%
2017	15.67%
2018	17.58%

Results

It's only since 2016 that users have started to add more vegan products to their shopping lists. 2014 - 2016 saw the difference in the frequency of vegan products to non-vegan products shrink, suggesting that users were increasing the amount of non-vegan goods they were buying.

However, there is a significant increase in this gap between 2016 - 2018, with the difference in 2018 being nearly double of that in 2016, rising from 9.00% to 17.58%

Percentage of Shopping List Each Category Occupies

Methodology

To look further into whether our users' shopping habits are becoming more vegan, we decided to also look at the % of space on a shopping list that both vegan and non-vegan products take up.

If there is a growing increase in the % of space vegan products take up on shopping lists, then this would be a definite example of users becoming more vegan. Likewise, a downward trend in the amount of space non-vegan products occupy on shopping lists would show a definite move towards veganism.

Percentage Amount of Users' Shopping Lists Vegan and Non-Vegan Categories Occupy, by Year

	2014	2015	2016	2017	2018
VEGAN	28.05%	29.95%	27.43%	30.97%	31.57%
NON-VEGAN	21.88%	23.89%	22.90%	22.58%	22.13%

Results

There has definitely been some growth in what % of shopping lists vegan products occupy, especially since 2016, growing 4.14% between 2016 and 2018. However, the space non-vegan products take up on shopping lists didn't decrease as much, only shrinking a nominal 0.77% over the same period.

This certainly shows that shoppers are not yet completely eschewing meat and dairy, despite buying more vegan products.
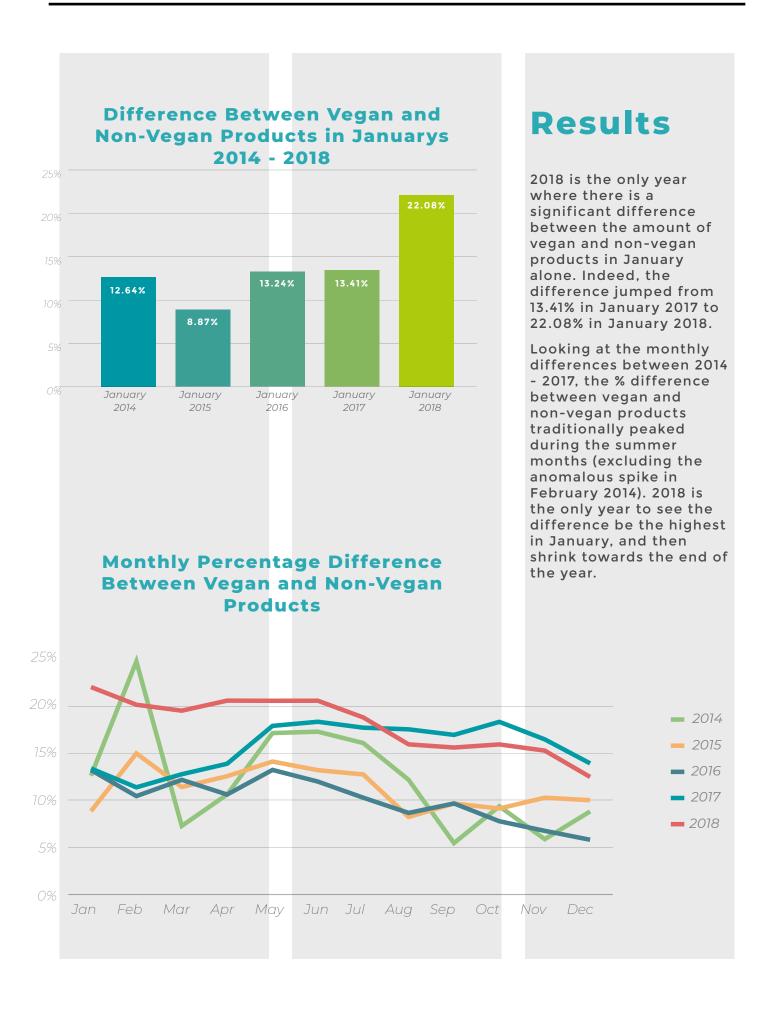
SHOPPERS ARE NOT YET COMPLETELY ESCHEWING MEAT AND DAIRY, DESPITE BUYING MORE VEGAN PRODUCTS

Differences between the % of vegan and non-vegan products (monthly): Impact of Veganuary

Methodology

We looked at the difference between the amount of vegan and non-vegan products on users' shopping lists on a month by month basis in the same manner as we did for the year by year analysis.

Difference Between Vegan and Non-Vegan Products in Januarys 2014 - 2018

25%
20%
15%
10%
5%
0%

12.64% — January 2014
8.87% — January 2015
13.24% — January 2016
13.41% — January 2017
22.08% — January 2018

Monthly Percentage Difference Between Vegan and Non-Vegan Products

25%
20%
15%
10%
5%
0%

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

Legend:
- 2014
- 2015
- 2016
- 2017
- 2018

Results

2018 is the only year where there is a significant difference between the amount of vegan and non-vegan products in January alone. Indeed, the difference jumped from 13.41% in January 2017 to 22.08% in January 2018.

Looking at the monthly differences between 2014 - 2017, the % difference between vegan and non-vegan products traditionally peaked during the summer months (excluding the anomalous spike in February 2014). 2018 is the only year to see the difference be the highest in January, and then shrink towards the end of the year.

Frequency of Named Vegan Products, Keywords, and Brands

Methodology

Looking to see if there are any named products, keywords associated with veganism, or vegan brands appearing on users' lists over the past 5 years will also give us an insight into whether users' shopping habits are turning towards more plant-based food.

WE RAN SEARCHES ACROSS ALL CATEGORIES TO LOOK FOR THE FOLLOWING:

KEYWORDS

Dairy-Free
Meat-Free
Plant-Based
Vegan

VEGAN PRODUCTS

Almond Milk
Cashew Milk
Nutritional Yeast
Quorn
Rice Milk
Seitan
Soy Milk
Soy Yogurt
Tempeh
Tofu
Wheat Gluten

BRANDS

Alpro
Beyond
Boca
Booja-Booja
Field Roast
Gardein
Hippeas
LightLife
Impossible
Larabar
MorningStar
Quorn
Sheese
Simply Balanced
Sophie's Kitchen
Sweet Earth
Tofurkey
Yves

Any significant appearances of these products, brands, and keywords would capture any rise in vegan products that might not come under "Produce" and "Grains & Pasta" due to how they are categorised within the app...

Results

ONLY THE FOLLOWING PRODUCTS RETURNED ANY SIGNIFICANT RESULTS:

- **Almond Milk**
- **Quorn**
- **Rice Milk**
- **Soy Milk**
- **Tofu**

No brands (with the exception of Quorn which is both a brand and a product) or any keywords were returned in the analysis.

Looking at the frequency of the products that are returned, there is a significant increase in their frequency from 2016 onward, suggesting users lists started to go more vegan from then on.

Interestingly, it seems that almond milk is the most popular dairy milk alternative. It's 47% more popular than soy milk.

ALMOND MILK IS 47% MORE POPULAR THAN SOY MILK

Legend:
- Soy Milk
- Almond Milk
- Tofu
- Quorn
- Rice Milk

Chart values:

	2014	2015	2016	2017	2018
Soy Milk			486	1107	3362
Almond Milk		120	650	1786	4956
Tofu	314		250	873	2342
Quorn	73	13	22	216	1000
Rice Milk				30	0

03 Conclusions

1

BRITONS ARE NOT GOING VEGAN BUT ARE BECOMING FLEXITARIAN

UK users are definitely adding more vegan products onto their shopping lists, with a growing difference between the number of non-vegan products bought, as well as the % of users' shopping lists vegan products take up growing, since 2016.

However, products from non-vegan categories like "meat" and "dairy" aren't showing any significant reduction. This suggests British shoppers are still buying significant amounts of meat for their diet rather than none at all.

Therefore, Britons may well be turning to a more "flexitarian" diet: eating more plant-based food and less, but not excluding, meat, eggs, and dairy.

2

ALMOND MILK IS THE MOST POPULAR MILK ALTERNATIVE

Almond milk is 47% more popular than soy milk and is the most frequent named vegan product on users' lists.

BRITISH SHOPPERS ARE STILL BUYING SIGNIFICANT AMOUNTS OF MEAT AND DAIRY IN THEIR DIET

3

VEGANUARY HAS ONLY STARTED HAVING AN EFFECT ON SHOPPING LISTS SINCE 2018

January 2014 - 2017 saw the difference between vegan and non-vegan products peak in the summer months rather than in January. But 2018 saw a spike in the difference between them at its highest in January, suggesting that Veganuary hasn't had any impact until then.

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