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An Exploratory Study of the Meat Substitute Market in Norway

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Summary

This thesis explores the meat substitute market in Norway, more specifically in Oslo. We have investigated Norwegian consumers' understanding of meat substitute products, their motivations for purchase and in which situations meat substitute products are consumed.

We have used a qualitative, explorative approach including two studies: a pre-study and a main study. Here, we have combined semi-structured interviews with observations to gain as much knowledge about the participants as possible. Our study found that there are differences between meat eaters and non-meat eaters which should be taken into consideration when developing and marketing new meat substitute products. We also identified a gap in the meat substitute market, which is meat substitute products for breakfast and lunch. The meat substitute products for dinner is much improved, but there are little or no products made specifically for breakfast or lunch to substitute e.g. ham, spreading etc. This gap should be explored, as it has been in our neighbor countries.

We also found that non-meat eaters and people who sometimes consume meat, had different requirements for products, and that this is something that should be explored further in research as well as in advertising. The more you eat meat, the more you would want a meat substitute product to be similar to meat. This makes factors like taste, texture and appearance more important for meat eaters than for non-meat eaters. Both groups consider fish to be a healthy substitute for meat, in contrast to traditional vegans and vegetarians who consider fish to be meat.

When it came to the different types of motivations, we found that the most important factor was what results they were hoping for when changing their diet. Respondents focusing on the positives of eating less meat, seemed to eat less meat substitute products than respondents focusing on avoiding negative consequences from eating meat. In the same way focusing on skin, weight and health also seemed to result in a higher motivation to eat meat substitute products than larger goals, like focusing on the environment.

1. Introduction

In this thesis, we will take a closer look at the Norwegian meat substitute market, focusing on the consumers of meat substitute products (hereby MSP). As we have noticed an increase in MSP available in Norwegian grocery stores and restaurants, we find it interesting to look deeper into the consumers of these products and their motives for purchasing MSP over meat.

Since 2016, many different companies have entered the Norwegian meat substitute market with new products. McDonalds has launched a vegetarian burger in their restaurants, followed by Burger King doing the same thing. Narvesen has launched vegetarian hot dogs, and different Norwegian grocery stores like Rema 1000 has launched their own vegetarian product line, Meatish. But why this sudden interest in MSP?

Based on this growing trend of MSP in the market, we are interested in further exploring the motives of the consumers of MSP. Some research has been conducted on vegans and vegetarians, as well as on the opinions of meat eaters towards those who choose to live completely meatless. However, little research has been conducted on so-called flexitarians; those who sometimes choose to eat meat, and sometimes not.

We focus on the Norwegian market, because while there is limited literature on MSP in general, the research already conducted mainly focus on USA and Holland. Also, by focusing on one country, we can avoid picking up on differences based in culture and tradition instead of types of consumers.

A better understanding of motives for purchasing MSP can help better segment the market for MSP, and be used to better target these segments more effectively with specific products and tailored marketing campaigns.

First, we introduce the topic of interest and the background for why it is interesting to further investigate. Second, we present the previous literature on the topic. Third, we present our pre-study and main study along with an analysis of both. And lastly,

we will draw some lines that should be helpful for future research, present our model based on our results, as well as some managerial implications of marketing and growth of the Norwegian MSP market.

1.1 Background

Baum and Whiteman, a global consultancy firm specializing in food and restaurant trends, predicted in December of 2017 that the main food trend for 2018 is going to be plant-based dining (Baum and Whiteman, 2017). This report discusses how the trend seems to be led by consumers and can therefore more easily be seen in shops where meat is being moved to give room for plant-based foods. They claim that restaurants, who are often the ones leading new trends in food, are falling behind: “But one mega-trend finds restaurants way behind the curve: The rapid consumer shift to "plant-based" foods. (...) Look to grocery store shelves because that's where innovation is showing up largely by cheeky packaged goods startups who've figured out this new consumer psyche” (Baum and Whiteman, 2017).

The Baum and Whiteman report also provides some more data in defense of their plant-based dining trend, including;

- 66% of U.S. consumers of alternative proteins believe that to be a healthier option for red meat.
- About 83% of U.S. consumers are eating more plant-based foods to improve health, while 62% do it to control their weight.
- The market research company Mintel found that there has been a 25% increase in vegetarian claiming products, and a shocking 257% increase in vegan claiming products in grocery stores between 2012 and 2016.

But at the same time, the numbers of North Americans following vegetarian and vegan diets are still at only 6% and 3% (All numbers from Baum and Whiteman ,2017; “2018 Food & Beverage Trend Report”).

These numbers seem to point towards a more plant-based dining by meat-eaters reducing their meat intake. Based on the numbers we found in the next section, we assume that this trend is also present in the Norwegian market.

1.1.1 Scandinavia and meatless diets

Having a meatless diet is something that has been present throughout human history, because of reasons including religion, environmental concern, animal welfare and health (Waterman, 2008). A 2016 study from YouGov, an affiliate of Virke Markedsanalyse which conducts market surveys and data analysis, shows that Norwegians consumed the most amount of meals without meat amongst the Nordic countries in the survey, with four out of five respondents having eaten one main meal without meat or fish the past week (YouGov, 2016). Interestingly though, 66% of these Norwegians said that this was just a coincidence, compared to 34% of Swedes saying it was because of an active choice to eat more vegetarian.

The most common reason mentioned in the study for all Scandinavian countries was “health reasons”, accounting for 30% of the 168 Norwegian respondents. The second most important reason for Norwegians and Swedes, were environmental reasons. For Danes, it was financial reasons, and for Finns, animal welfare.

Even if this data is based on a small sample, we can see a general trend for the Norwegian sample which ranks the most common motivations in order from most important to least important: health, environmental, animal rights and lastly, financial reasons.

1.1.2 Vegans, vegetarians, and flexitarians in Norway

There are not a lot of definite statistics about vegans and vegetarians in Norway, and any possible growth is undocumented. However, according to Google Trends, a way of exploring what the world uses Google for, the number of searches of words like “vegetar” and “veganisme” have more than doubled in Norway for the past three years. We have also noticed an increase in easily available options in Oslo for vegans, vegetarians and others that for different reasons wish to cut back on meat. In contrast to the Baum and Whiteman report, we perceive the Norwegian restaurant and café industries to be leading the way here. Some common examples are vegan kebabs, vegetarian hamburgers, and soy and oat milk options at many coffee shops in Oslo.

Food companies have launched their own product lines of vegan and vegetarian products in Norwegian grocery stores. Rema 1000 with their “Meatish” products, Coop’s “Vegetardag”, Hoff with their “Liv Laga”, in addition to well-established brands like Oumph, Oatly, Hälsans Kök and Quorn. Norgesgruppen reported that they experienced a 28,6% increase in sales of MSP from 2015 to 2016 (Framtiden i våre hender, 2017).

Blogs and books like Mia Frogner’s “Grønn Bonanza” has been all over the bookseller charts with its focus on “expanding the idea of a good meal”, instead of on being “a vegetarian cookbook” (Cappelen Damm, 2016). This wider focus is interesting to us as it changes the focus from selling products and meals to people that are already eating meat-free to focusing on introducing more meat-free options to the average consumer.

If nothing else, this indicates an increase in the interest around the topic, which could be related to the launch of more MSP in Norwegian grocery stores.

1.1.3 Switching from meat to MSP

One reason to believe that meatless diets will not be adopted by the majority, is due to people’s view and opinions about meatless diets. The definite choice to eat meatless, is a norm-challenging behavior with many opinions and strong biases linked to it. Choosing to live meatless can be viewed as a threat to the status quo, and can therefore be met with resistance (Waterman, 2008). For a country like Norway, which has a pretty strong western view of the benefits of individualism, this might be less of a threat in itself.

However, a rise in individualism has been seen across the globe, with cultures stepping away from collectivism, and instead, seeing uniqueness as a strong value (Santos, Varnum & Grossmann, 2017). This gives us reason to believe that the negative stigma of choosing to eat different from most of the population, could be disappearing worldwide. At the same time, we can also assume that as eating meat-

free becomes more common and as more information related to not eating meat is spread, the actual norm of how people should eat might change.

Worldwide campaigns like “Meat Free Mondays”, led by celebrities like Paul McCartney, Jamie Oliver and Emma Thompson, have for years tried to sell the idea of eating meatless as an easy way of saving the planet. Looking at the statistics for Norway they seem to be succeeding. Opinion did a large survey for NOAH in 2011, which we will use as our baseline study, where they found that about 4% of Norwegians are vegetarians or vegans, which calculates to over 200.000 Norwegians (Opinion for NOAH, 2011). The same study showed that half of the Norwegian population ate a vegetarian dinner 1-2 times a week, whilst the number for 750.000 other Norwegians was 3-7 times a week. The listed reasons for wanting to eat less meat were health benefits, environmental concerns and animal welfare (Opinion for NOAH, 2011).

Despite the knowledge of the benefits of eating less meat, we see that the meat consumption in Norway continues to increase, despite a quarter of all Norwegians saying that they plan on eating less meat (Evensen, 2017). However, there is a gap between what Norwegians say they want to do, and what they do. In this thesis, we wish to gain a better understanding of these motives, and how they can be turned into changed behavior.

As mentioned above, the numbers we have, say that there are over 200.000 people in Norway who abstain from eating meat entirely (Opinion, 2011). As this is quite a small number, we will instead look at the potential Norwegian market for MSP as anyone in Norway currently eating or trying to eat meat-free once a week, so around half of Norway’s population, or around 2,6 million people.

1.1.4 Norwegian grocery stores and food producing companies

Until recently, getting vegetarian and vegan options for cheese, milk or meat required either a trip to Sweden or to an expensive healthcare shop. As international brands like Hälsans Kök and Oatly started becoming more and more available, it seemed like the Norwegian competition came mostly from grocery stores own

private labels, like Coop's "Vegetardag", which includes everything from burgers, to "servalat" (bologna sausage) and sauce and dressings. Coop even sold their burgers at Oslo's Øyafestivalen, a festival in Oslo with a main focus on organic and vegetarian food choices (Øyafestivalen, 2017).

Synnøve Finden and Go'Vegan

In September of 2017, the Norwegian company Synnøve Finden launched a new vegan cheese called Go'Vegan, which was directly marketed towards the Norwegian vegan community. We got in touch with their Category Manager, Preben Owren, who was responsible for the launch of this product. He told us that they started working on this vegan cheese as they had seen a gap in the vegan cheese market, where the existing products were both few, and very expensive.

As it was their first time producing a cheese free of dairy products, they cooperated with a French producer with the correct experience and equipment for non-dairy cheese. They also collaborated with a well-known Norwegian vegan cookbook author, Jane H. Johansen, the woman behind the well-known Norwegian vegan blog, Veganmisjonen, to make sure they met the vegans' expectations for this new cheese substitute. Together, they cooperated to optimize the taste, melting ability, design and even the name of the product. Synnøve Finden informs us that although it is not their "cash cow" product, they are very satisfied with the results so far, and they also came out with a "block cheese" version of Go'Vegan in a later launch.

With this product, Synnøve Finden aimed for a much smaller market than for a MSP as cheese does not have the same negative connotations as meat and is not something people typically change out unless they have dietary restrictions that require it. Even though this is not a MSP, we believe that this example shows how smaller consumer groups are being taken seriously and driving new launches in the Norwegian market. If the Norwegian vegan market is large enough to sustain several types of vegan cheese, the market for meat substitute products should be large enough to sustain new launches and more products.

Hoff and “Liv Laga”

Hoff, a Norwegian potato-based food processing company, also released a line of vegetarian burgers called “Liv Laga” in 2017 that we found very interesting as they were very clearly marketed to the general public.

These “Liv Laga” vegetarian burgers are two different types of soy- and gluten free “burgers” clearly marketed as meat substitute products. We believe that it is very clear that they are using a general targeting of regular, meat-eating families with their advertising, perhaps especially those that want to, for example, partake in Meatfree Mondays. The name alone, “made for life”, also hints at an expression that refers to something being sustainable and sturdy. As the name is one of the most important pieces of branding, it is clear that they have their main focus on sustainability and health, which makes sense as this is an easy argument to make. The products are easily cooked and prepared in the commercial, as well as the branding of the products as “burgers” also shows the convenience and simplicity of cooking and eating the products. Both of these ideas are also strengthened by their slogan “Have a meat-free day!” and on their web page showing the full statement: “By replacing a meat dinner with HOFF Liv Laga veggie burger, you are doing something positive both for yourself and the environment”.

Through television ads focusing on families eating the burgers together, they also work to normalize a meat-free dinner, showing how through their MSP a meat-free meal can be just as good and easy as one with meat. This idea is further strengthened through the focus on the many ways you can use their “burgers” to create other types of meatless dinners, including their webpage being a recipe hub. Some examples include the MSP served sliced in a salad or on the side with hummus, to show the versatility of the product.

As part of the launch we also noticed several stores having a Hoff Liv Laga-stand with people handing out free samples, which is a classic strategy for introducing new concepts and in this case familiarizing shoppers that may not have tried a potato-burger before. It will be interesting to see in the coming year if they will continue to branch out this new concept with more potato-based products. This

could be another step in normalizing the use of MSP as an alternative to familiar processed meats like sausages, burgers, and chicken tenders.

1.2 Objectives

The main objective in this thesis is to gain a deeper understanding of Norwegian consumers' understanding of meat substitute products, their motivations to buy MSP, and in which situations they consume MSP. To do this, we aim to study different consumers who are currently purchasing, consuming or avoiding MSP to gain a better understanding of how they fit into this larger trend. This information can be used both to understand a young and, seemingly, growing market, and to create more attractive products and more effective marketing campaigns.

Because of the large differences in consumers' reasons for not choosing meat, ranging from vegans and vegetarians that base part of their identity on the fact that they do not eat meat, to people who try to eat less red meat, we assume that there are differences in motivation and reasoning that affects what people eat, and which MSP they are interested in. To understand these differences, and what they mean for the future of this product category, we want to compare the different groups' thoughts and reasoning for choosing, or not choosing, MSP.

Based on the fact that half of all Norwegians seem interested in eating meat-free at least once a week, and with increasing interest around vegan and vegetarian cuisine and diets, we believe that there are many different groups and segments with different motivations and habits. We are most interested in the different types related to the largest segment that we assume is interested in MSP, which is also the group with the least amount of research conducted on them; people who sometimes choose to eat meat, and sometimes not.

2. Previous Research

Previous research conducted in the area of meat substitute products, can be dated back to the 1950s. An article by Wrenshall from 1951 emphasizes the importance of meat substitutes having meat-like flavors, texture and consistency. This article also describes the motives of Americans for purchasing such products as being

mostly for financial reasons, being an inexpensive substitute for meat products at the time (Wrenshall, 1951). However, meat is cheaper than ever in Norway. Porkchops now sell for 29,90 NOK per kg, as opposed to 91 NOK per kg in 1986 (Framtiden i våre hender, 2009). This leads us to believe that there must be other motives than financial ones, to explain the increasing consumption of MSP. Therefore, it is interesting to look into how the motives might have changed today.

2.1 Defining Meat Substitute Products

Meat substitutes, also referred to as meat replacers, meat alternatives or meat analogs (Davies & Lightowler, 1998; Sadler, 2004), are primarily made of vegetables and proteins like soy, fungi or cereal protein. The aims of such products are to either give vegetarians easy options to substitute meat, or to decrease the meat consumptions of non-vegetarians. Since there are many more non-vegetarians than vegetarians this means that the main focus to grow the market should be on attracting new customers, meaning that meat substitute products need to facilitate to the needs of non-vegetarians looking to replace meat without converting directly to beans and lentils. The first products sold as meat substitute products were soy and tofu, introduced to the Western market in the 1960s. Other, more meat-copying MSPs, like vegan chicken bites, from companies like Tivall from Israel and Quorn from England were introduced less than 25 years ago (Davies & Lightowler, 1998; Sadler, 2004).

2.1.1 General segmentation of the MSP market

To better understand the MSP market, we need to define the different targeted segments. According to a study conducted on the health attitudes of the Dutch population, three segments were suggested: vegetarians, non-vegetarian consumers of meat substitutes, and meat consumers (Hoek, A. C., Luning, P. A., Stafleu, A., & de Graaf, C., 2004).

The study showed that vegetarians and consumers of meat-substitutes had similar socio-demographic profiles: higher education levels, higher socioeconomic status, smaller households and more urbanized residential areas compared to meat consumers. In addition, the studies showed that vegetarians had more positive

attitudes towards the importance of product information and health than meat consumers. It was also suggested that in strategies to promote meat substitutes to non-vegetarian consumers, the focus should not only be on the health and ecological aspects of foods, but also on the price and quality of the product. It seems clear that these different factors all affect the image and knowledge consumers have of a product, also affecting the motivation to buy and try.

The Norwegian Directorate of Health's annual report on eating habits amongst Norwegian inhabitants, reports that Norwegians aim to consume less hot dogs and red meat, believing that to be a healthier diet (Helsedirektoratet, 2016). In addition, they name the attributes Norwegians value the most when shopping; good taste, healthiness, price and amount of natural ingredients. This is interesting when marketing new MSP, especially when targeting meat-eaters who might need an extra push to challenge their eating habits.

One of few researchers we have found to have done extensive research on this topic is the Dutch Dr. Annet C. Hoek, especially regarding consumer acceptance and health attitudes towards MSP. A study she conducted in 2004 of Dutch consumers, found that consumers of MSP tend to have a higher educational level than meat consumers (Hoek, et al. 2004). This aligns with the findings of the Norwegian Directorate of Health's annual report on Norwegian Eating Habits (2016), which found that people with a higher education tend to eat meat less often than those with a lower education.

Hoek's study also found that non-vegetarian consumers of MSP put a remarkable high importance on price and the quality of the product as compared to what it was attempting to substitute. She also found that women were the main users of MSP in this category. Hoek et. al. state that "in order to make meat substitutes more attractive to meat consumers, we would not recommend to focus on communication of ethical arguments, but to significantly improve the sensory quality and resemblance to meat." (Hoek et al. 2011). They also found that the less consumers were using MSP, the more they wanted the products to be similar to meat. Another important finding is that non-vegetarians rated *convenience* and *familiarity* to be more important than vegetarians.

Based on previous research in demographics and behavior of users and non-users of MSP as discussed in this section, we have derived the following research questions for this section:

1. Who are the main purchasers of MSP?
 - i. Do they differ across age, income, background?
2. What they buy - do they buy MSP that echo meat products (like vegetarian burgers, minced meat, sausage, etc. made with soy protein or similar), or MSP that do not (like products with beans, peas, sweet potato, etc.?)

2.2 The motivations of vegetarians, non-vegetarian consumers of MSP and meat eaters

Hoek (2011) also found that the unfamiliarity of MSP compared to meat is a critical product feature that can be limiting to consumer acceptance. This means that having a housemate/ partner or a group of friends who are positive towards, and uses MSP, contributes positively to a higher consumption of MSP for the people around them.

Previous research also shows that there are differences in motives, motivations and reasoning for purchasing MSP for non-users, light/medium users and heavy users. Hoek et al. (2011) describes the differences in food choice motivation as being different for these user groups, with non- to light/medium users having a higher focus on health, ecological welfare and weight control, and medium to heavy users having a higher interest in ecological welfare. Here, Hoek shows that non-users and light/medium users are more motivated by their own body and health when choosing MSP (Hoek, A. C., Luning, P. A., Weijzen, P., Engels, W., Kok, F. J., & de Graaf, C., 2011). If this is true for the Norwegian market, it can be an important part of marketing to this segment and means that campaigns like Hoff's Liv Laga might be focusing on the wrong aspects of meat-free eating.

Based on this we have derived the following research questions related to motivations:

3. What are the given reasons and motivations for purchase or non-purchase?
 - i. Do they differ across sometimes-meat eaters and non-meat eaters?
 - ii. Do the different reasons vary in strength?

2.3 Social influences and situational eating habits

As most eating takes place in the presence of other people, the influence of others on what we choose to eat should not be ignored when discussing food (Rozin, 2005), it should not be surprising that our eating behavior is influenced by social factors such as the modeling effect. The modeling effect is a social phenomenon in which one adapts ones' intake of food to that of others (Schachter, 1971).

Since we previously have discussed higher awareness of MSP through both own experiences and that of friends, we believe that this is extra interesting in our case. Social influence is interesting to look at for all of our participants, but especially for those that live and eat with others on a daily basis.

We are also interested to see if there is a difference in MSP consumption at home versus in restaurants, or when visiting others. Considering the Baum and Whiteman trend report and our own contrasting experiences we want to see if there is a difference in how our respondents considers restaurant, and store offerings. From this we have derived the final research questions:

- 4: When do different consumers choose MSP?
 - i. At home, at work, in restaurants?
 - ii. When eating alone or with others?

3. Method

In our thesis, we wish to investigate Norwegian consumers' understanding of MSP, their motivation for purchasing and consuming it, and in which situations they are consumed. Since there is not a lot of research conducted in this area, we find it best to use an explorative approach to better answer and understand the "why" questions and to hopefully provide new insight. We use a grounded theory approach because we wish to contribute with propositions, rather than to test a specific hypothesis (Willig, 2013).

3.1 Qualitative study

Since our objective is to gain understanding of the intentions, motivations and reasons why consumers purchase and consume MSP, we chose a qualitative approach. Through use of qualitative interviews, we can avoid yes/no answers, and add why/how questions to go deeper into the subject of matter and gather more information.

Due to being limited by time, we chose one round of structured interviews for our pre-study and then a round of semi-structured interviews combined with observations for our main study to fully capture the objects thoughts and perspectives in our final study.

3.2 In-depth interviews and observations

The style of qualitative information gathering we have chosen, is mainly the use of in-depth interviews. In-depth interviews are a qualitative research technique that involves conducting intensive, individual interviews, with a small number of respondents to explore their perspectives on a particular idea, program or situation (Boyce & Neale, 2006). The purpose of a qualitative interview is to gain an understanding of the participants' everyday life, from their own perspective. By interviewing a variety of participants, and not only vegetarians and vegans, we hope that this will help us gain a thorough understanding for why people chose, or do not chose MSP.

In addition to in-depth interviews, we also added an observational element in our main study. The purpose of observing our participants in action, was to gain a broader view of their habits and actions through watching, to see whether their answers match how they behave in the kitchen. We wanted to see how they behave and act, as much on their own terms as possible. By seeing them in their natural element we also hope to be able to pick up on outside influences and other things that can affect how they answer our questions. It also allowed us to witness how they prepare the meal, with who, and their thoughts around what a dinner meal should consist of and how much time should be spent on it.

This type of observational research is related to the ethnography method, and although we are not following our respondents for several years, we do believe that there is important information to pick up on and note through observing them while they are shopping, cooking and eating.

3.3 Interview guide

The main goal of our interview guide, was to cover all topics of interest and gain as much information as possible related to our research questions. This led to our interview guide mostly consisting of open-ended questions. The interview guide for our pre-study intended to open for new definitions, and possible topics we had not thought of. This allowed us to improve the interview guide and add more topics and questions for our main study.

Our main questions were very wide, attempting to open up for discussion and related thoughts. We also prepared several follow-up questions in advance to be used if the conversation stopped or swerved too much from the main topic. We wanted to, as much as possible, have a conversational feel to the interview to make our respondents feel comfortable enough to inject their own thoughts and opinions without guiding questions. This is also why we decided to do the main part of the interview while they were preparing dinner. Our hope was that the comfortable setting and having something to do that was relevant to the topic at hand would make it easier for the respondents to act naturally and reflect around the topic, while allowing us to observe them (see appendix 1).

4. Studies and results

4.1 *Pre-study*

As our topic of research contains a lot of terms that may not be immediately understood, and is based around individual perceptions, we decided to do a pre-study. Our main goal was to gain more knowledge about the topic and to look for weaknesses in understanding before the main interviews, to create as specific and clear questions as possible. The pre-study also helped us gain an understanding of vegans and vegetarians, and their perceptions of each other.

For the first interviews, the sampling itself is less important, as it is not meant to be representative, but we do want to represent both meat eaters and non-meat eaters. Because of this, and time limitations, we used a convenience sample to create as most of a heterogeneous sample as possible. By contacting people with the background and diets that we were most interested in, we managed to talk to four widely different respondents.

4.1.1 *Participants pre-study*

To start we contacted friends and family that we knew had different eating habits and backgrounds, hoping that these interviews would improve our understanding of how the term MSP would be understood by different people with different eating habits, and to gain a stronger knowledge for the second round of interviews.

As our interview objects were our acquaintances, it made it easier for us to know that our participants were comfortable with the situation. We stated that the pre-study was a way for us to align different definitions and to gain insight into people's thoughts, ideas and perceptions of MSP. We also asked how they themselves would rate their level of MSP consumption, to get a general overview to compare with their answers as well as to compare respondents. We are at this point just looking for people that are representative of Hoek et al.'s (2011) three suggested segments; vegetarians and non-vegetarian consumers of meat substitutes, and excluding meat consumers, to see if they fit with the characteristics suggested by Hoek.

For privacy and anonymity reasons we have changed all names according to the ABCD-principle. Instead of using “respondent A” and similar, we give each respondent a new name in alphabetical order, as seen in table 1. We also made this clear to our respondents before their interview. Table 1 also includes a general overview of respondents.

Name	Age	“Label”	Living situation	Level of education	Level of MSP consumption
Pesc-Anna	22	Pescetarian	Partner: Meat-eater	Bachelor	High
EnviCons-Beate	27	Non-vegetarian consumer of MSP	Single	Master	Medium
NonVeg-Christian	24	Non-vegetarian consumer of MSP	Partner: Meat-eater, MSP	High School	Low
Vegan-Dina	21	Vegan	Partner: Meat-eater	High School	Medium

Table 1: Pre-Study Respondents

4.1.2 Procedure Pre-study

As we chose a convenience sample, we already knew their eating habits which enabled us to choose a mixture of vegetarians and non-vegetarian consumers of MSP.

We conducted four interviews, either in our own, or their home. We were not looking for definite answers, or for generalizable facts, but to best possibly understand our respondents and their point of view, and through this be able to compare these different views. Through this, we hope to gain a better understanding of different interpretations of MSP in a way that will help us in our main study.

4.1.3 Results pre-study

The main results we found in our pre-study was that we could see three main views on what a meat substitute product was; something that “pretends to be” meat, something that reminds you of meat and something that more generally can be used instead of meat as a source of protein.

“It (a MSP) is a product made of natural ingredients, like vegetables, that have been put together in a way that makes it similar in consistency, and a bit in flavor, to meat.”

- (NonVeg-Christian)

“I consider a meat substitute product as something that directly pretends to be meat, like a veggie hot dog, soy-burger, tofu-turkey and similar.”

- (EnviCons-Beate)

This could be an interesting route to look further into, especially if it relates to the reasons people purchase meat substitute products. As discussed by Hoek (2011), the differences in user groups could be related to what factors of a product is seen as the most important, and this information would be relevant to what marketing fits best to different types of MSP.

Even though many respondents mentioned fish as an alternative to meat, no one mentioned it in relation to a meat substitute product. This might also be seen in the different views they had regarding if fish is considered vegetarian friendly or not.

“I prefer to eat fish, like “makrell i tomat”, on my bread as spread, something vegans, and possibly most vegetarians, wouldn’t allow”

– (Pesc-Anna)

“Unlike a vegan, a vegetarian can therefore eat milk products and similar. Their diet is though free of meat, but I wonder if some vegetarians do allow themselves (to eat) fish.”

- (EnviCons-Beate)

This position of fish as some form of MSP was not something we had considered before this pre-study, but after the interviews, we started considering the interesting aspects this could bring to the focus of the paper. We decided to follow this thread more in the next study to see how fish could fit into this model of meat substitutes, since for many, fish was considered one of the best things to eat.

When it comes to situations and times when people mostly seems to eat and/or purchase MSP, we see dinner come up as the most natural time to eat meat free. This can also relate to the fact that this is the meal people seem to generally connect the most to meat, and therefore, is the most natural place to try to cut back for people that do eat meat most of the time. We can also see that there is a separation between having dinner at home and dinner out, with meat free options being easier when people can cook them themselves.

“(...) it’s mostly dinner that separates my diet from a regular vegetarian diet.” - (Pesc-Anna)

“I mostly eat meat-free all days when I make my own dinner.” - (EnviCons-Beate)

“I continued drinking milk and eating eggs for a while, especially if we were out amongst others or at a restaurant, because it was so much easier getting vegetarian food than vegan food. (...) At home I had more control over my food.” - (Vegan-Dina)

We can also see people mention specific situations, like barbecuing where the availability of MSP is easier, meaning that being a vegetarian is much more flexible than it has been before. They also mention the existence of substitute products as making it easier to eat out with others without standing out, like with falafel-style burgers at restaurants.

“I mostly buy soy-sausages and pretend that it’s hot dogs, and that’s especially something I buy for barbecuing in the park as a direct substitute to the regular hot dogs my friends will be grilling.” - (EnviCons-Beate)

When we discuss what they consider most important when it comes to what they eat, we get similar types of responses as mentioned earlier; health, the environment and animal welfare are mentioned as main reasons to eat less meat. Economy is

mostly used as a reason against choosing MSP and not against choosing meat, which would make sense considering the low price of meat currently, as discussed in the background section of this paper.

“But then when I went back to eating meat, it turned out that my body felt a lot better while I wasn’t eating eggs, milk, meat or any of it.” - (Vegan-Dina)

“I try to shop for things I can use as many different things, mostly vegetables and similar, both because they are often the cheapest option, and because it means I don’t have to shop as often.” - (EnviCons-Beate)

“The most important thing is that it’s good (for you) and makes sure your body works”. - (NonVeg-Christian)

“I would like more environmentally friendly options. I try to avoid soy and tofu as well as meat, and instead choosing beet burgers or similar.” - (EnviCons-Beate)

“I guess it depends on the situation, but I think for many the most important thing is that it should be quick and easy (to make).” –(Pesc-Anna)

When it comes to MSP our young, urban respondents seem in general to be very positive. They mention it being a way of lowering the effort needed to choose differently, and it being a necessary step to lowering the meat consumption by letting people mostly continue on with the way they are currently eating.

“Since we are mostly used to including meat in several meals a day, we need a replacement for it if we are going to be able to reduce meat consumption” - (Pesc-Anna)

“(…) some of the best consequences of there being more meat replacement products and similar is that it means it requires less effort and energy to choose different.” - (EnviCons-Beate)

The demand for MSP is clearly there, but the selection could be better. As Pesc-Anna mentioned, we eat meat for other meals than just dinner, and therefore need MSPs for both breakfast and lunch, too.

“The current selection isn’t good enough, and I feel as if it isn’t very inviting for people that like meat. (...) I don’t care to go from meat to meat substitutes that aren’t good enough replacements when it comes to taste and texture.” - (NonVeg-Christian)

«I used those two weeks as a vegetarian as a kind of detox-thing, where you weren’t supposed to eat meat for two weeks to lower your calorie intake”- (Vegan-Dina)

We also had someone mention the growing trend of laboratory grown meat, which is still in very early stages, but that could replace meat that involves killing animals.

“I especially believe that new products that look like meat will come in and take over, things people recognize that look like meat, but aren’t from animals. Maybe things made in laboratories where no animals have been involved.” – (EnviCons-Beate)

In a future market where meat and meat from labs will be available, animal welfare and environmental concerns about red meat might disappear, but the health aspect might still stick around. This can be perceived as a potential threat to the MSP market, especially for those focusing on health and environmental reasons. As this still seems far in the future, this is not something we will focus on going forward, but it is worth noting.

“My boyfriend is generally skeptical to my food, but later I’ve been able to find more and more options that he is interested in trying, things like bbq oomph! and similar things.” – (Vegan-Dina)

“I probably would never have tried some of those things if it wasn’t for my girlfriend being interested in it”
– (NonVeg-Christian)

Just as expected, the factor of who someone is living with, and how they eat, does affect how open someone is to MSP, and how much experience they have. Things that are similar to familiar foods does lower the bar of trying something new, but there still seem to be a barrier.

4.1.4 Pre-study and Hoek et. al.

Our results here do not directly fit with Hoek's results related to non-, light- and medium users being most interested in health and weight control, with our only vegan respondent being the person most motivated by body and health issues, but we can still see the general lines she describes. The light- and medium users mention health (NonVeg-Christian, Vegan-Dina), ecological welfare (EnviCons-Beate), and weight (Vegan-Dina), although in a way that focuses on meat-free not being a diet in itself. As this is a small sample, collected to provide insight, we will not conclude from this.

4.2 Main Study

For our main study we chose semi-structured interviews with open-ended questions. We extended our interview guide from our pre-study, opened it up further around our research questions, as well as adding in an observational element and a self-reporting element with a food diary. As our main objective was still to gain a better understanding of why consumers choose MSP as an alternative to meat, we wanted to avoid limiting the answers and thoughts of our respondents. To help them feel more comfortable we also chose to interview them while they were going through their regular routines at home, as well as while they were thinking about and interacting with food, as with the shopping round.

4.2.1 Procedure main study

For this study we also chose a convenience sample. Prior to the interview, we had asked our participants to write down a food diary of their seven last dinners. This gave us a chance to discuss the meals with them, see how they combine and choose food, and discuss the setting the food was consumed in. This also allowed us to analyze beyond the one dinner they cooked in our presence.

Another interesting factor about letting them self-report, as well as explain their reasoning, is that it shows us what they themselves see as good reasons for MSP, meat, or other meals. This gives us more reasons, situations and motivations to discuss.

The first part of the interview-process was in a local grocery store, where the participants themselves would shop for dinner as they normally do. Here, we asked them to describe what they were doing, and we would ask questions and observe at the same time. Then, the interview continued in the kitchen preparing the meal. This allowed us to observe the entire preparation and cooking process while continuing the interview.

We chose to video record the shopping trips, and then recorded the rest of the interviews regularly, both just using our phones as the quality of sound was more than good enough, and this made the whole process much easier. We both listened, and watched, through all the recordings at first, before we started transcribing. Then, we started back at the beginning, listening through and writing everything down in separate documents.

4.2.2 Coding and analysis

In “The coding manual for qualitative researchers” (2015), Saldaña goes through the main steps of coding, in a qualitative text. One of the things he discusses is the importance of “pre-coding”, where the researcher marks significant quotes or passages that strikes as important in the first read-through, what Boyatziz (1998, quoted in Saldaña) calls “codable moments”. We have done this throughout our interviews, focusing each section around a quote that stuck out to us as a fitting framing of each interview.

We have used a conventional content analysis for our coding, starting with our observations, and then deriving and defining our codes based on the data instead of starting from a theory of codes (Hsieh & Shannon, 2005). This means that while our interview guide (see attachment 1) was already divided into the following

topics: “the term meat substitute product”, “situations for use of meat substitutes”, “motivations for eating meat substitutes”, “shopping for meat substitutes”, “the future of meat substitutes”, and “view of vegetarians and meat eating”, we did not use these directly when coding our data. Instead we followed Creswells (2007, as cited in Saldaña 2015) system, expanding this to several categories sorting them into “themes”. Part of the reason for this is that he notes that when coding, something unexpected can appear in the data, and that this makes it important to not limit what you can find when coding (Creswell, 2007, as cited in Saldaña 2015).

The actual coding process was long and extensive. We did not find any transcription software working well enough for our Norwegian interviews, and so decided it was easier to just do it by hand as we had so few. We also chose not to use any statistical software, as our data material consisted of only 4 interviews, as well as the previously coded pre-study interviews. It therefore made sense for us to code by hand, mainly using markers in different colors (see figure 1 for illustration).

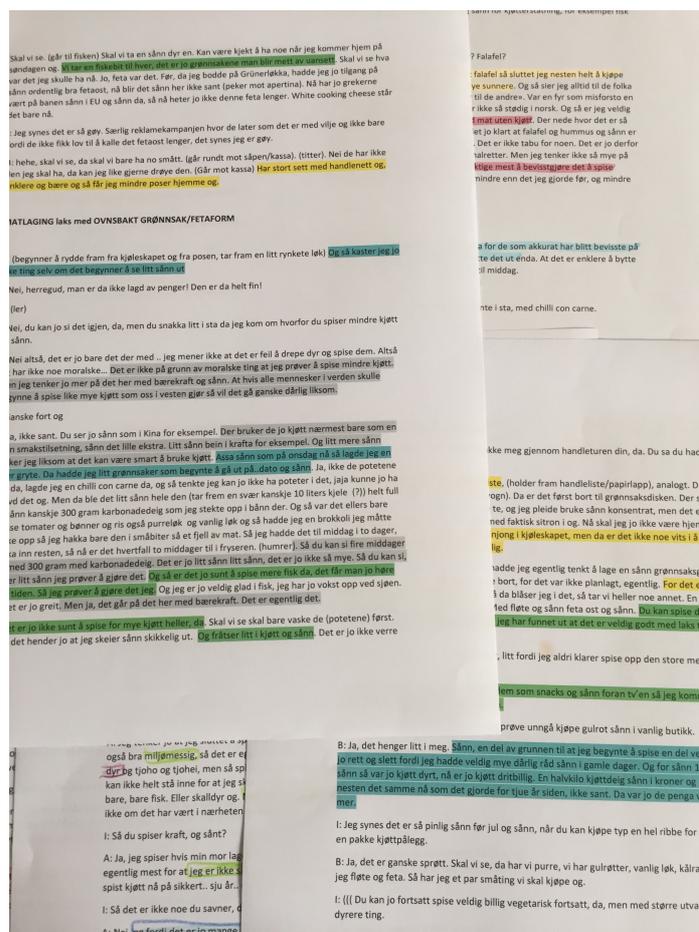


Fig. 1: Example of color coordinating.

To group the coded data together we used discussion, reasoning and our senses to determine which data “looked alike” and “felt alike” (Lincoln & Guba, 1985, p347 as cited in Saldaña 2015 p9) to group them together in subcategories and main categories, or themes.

To better describe and refine the three categories we found (see fig.2,3 and 4), we turned to Saldaña (2015) again and developed a “rule for inclusion” for each category:

Understanding: Different understandings and definitions related to what it means to eat meat substitute products, and what a meat substitute product is.

Situation: Anything related to other aspects of the meal, like where it is eaten, who it is eaten with and when it is eaten.

Motivation: Personal factors, knowledge and beliefs that drive people to want to eat less, or no, meat, as well as personal factors, knowledge and beliefs that drive people to want to eat MSP.

Creswell suggests five to six major themes (Creswell 2007; Saldaña 2015), but we have instead chosen to follow Wolcott (1994; Saldaña 2015) and use three themes to report our qualitative work based on our hierarchical coding. Our three chosen themes are; “situation”, “motivation” and “understanding”, and these themes will be the main topics used in our analysis from here.

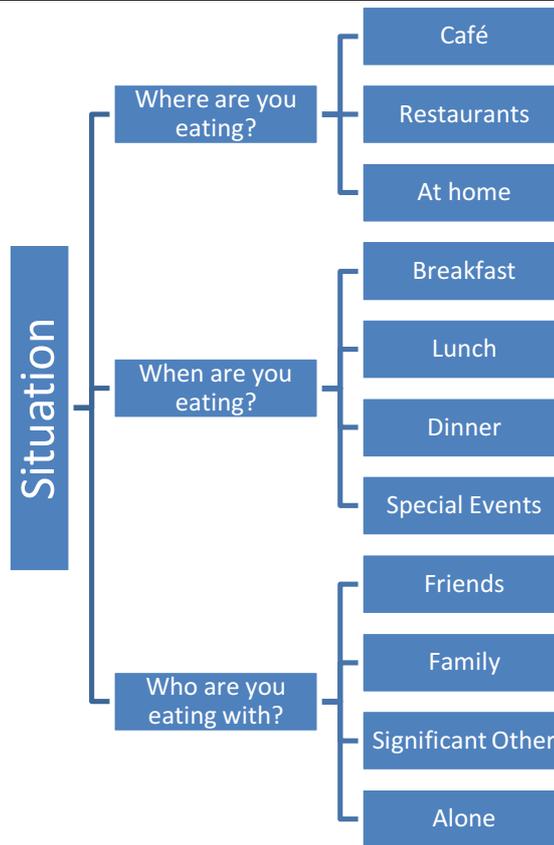


Fig.2 Situation

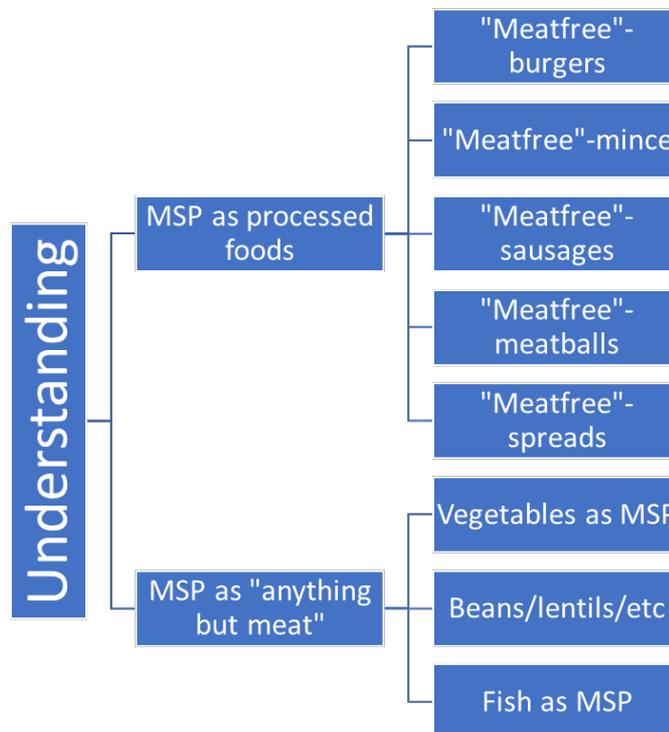


Fig.3 Understanding

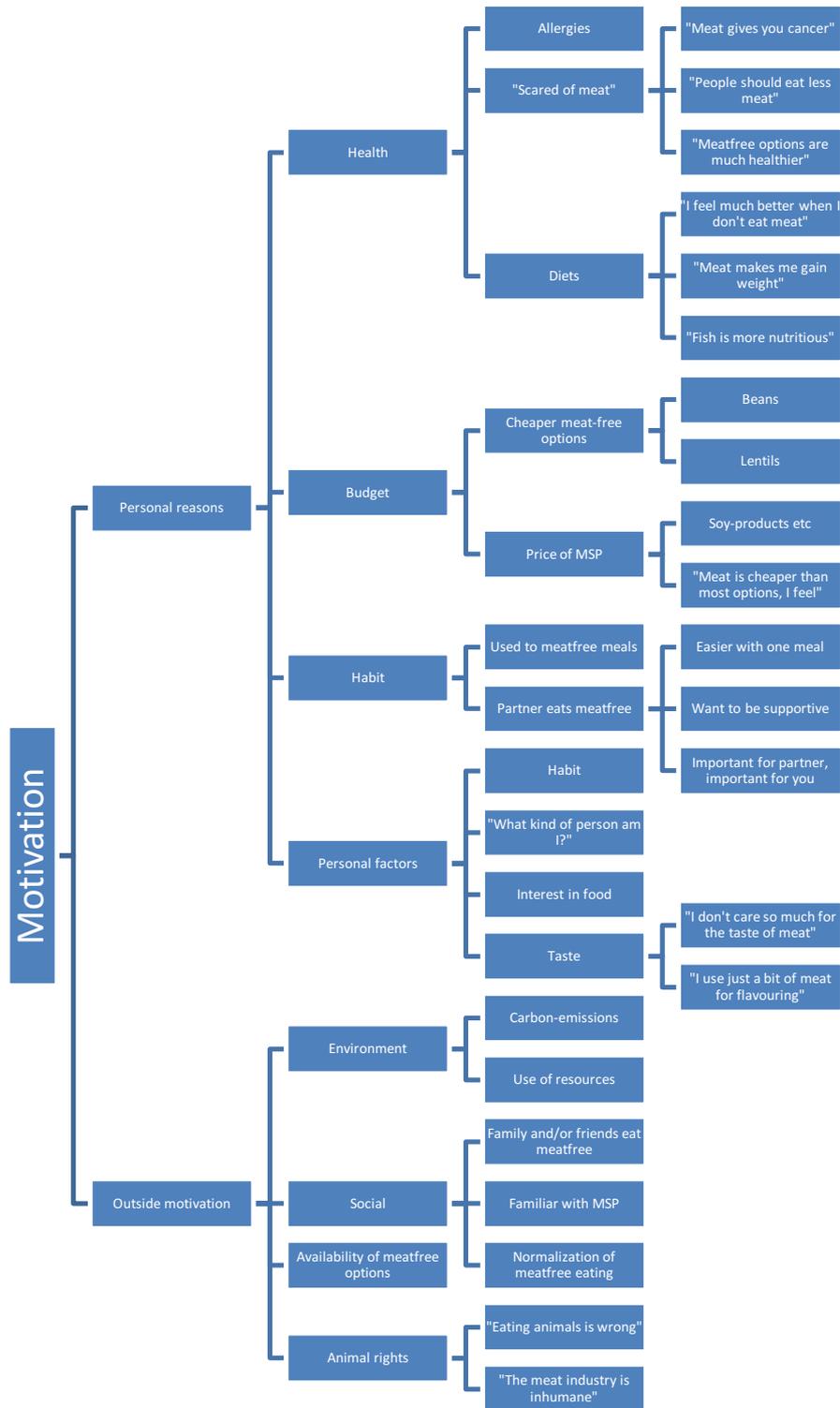


Fig.4 Motivation

4.2.3 *Participants Main Study*

When choosing our sample of participants, our main goal was for them to differentiate in age, gender and “label” to provide us with nuanced perspectives and answers. Therefore, we ended up with two women and two men in different age groups. We had a few demands when it came to the participants: all had to be over the age of 18 and have moved out from their childhood home. This allowed us to ensure that they were responsible for their own shopping, and therefore economically attached to their purchases. This would also allow us to keep budget and price as a direct factor.

We also made sure our interview objects were familiar with eating meatless, even if it was not something they did every day, because our main interest is in the large part of Norwegians that are already eating some meat-free meals. Therefore, our main focus was still on vegetarians and non-vegetarians consuming meat substitutes, as described by Hoek (2004). One of our participants turned out to only eat vegetarian when eating with his vegetarian girlfriend, making him a good representative of a meat consumer that was also aware of MSP, as well as an interesting person to discuss the motivations of the people around us as behavior-changing.

It was hard to establish how many participants we needed when we started planning this main study. The standard for knowing when to stop in qualitative research is to keep interviewing until adding people stops adding to your understanding, but as we knew that we probably would not be able to do several rounds of interviews in the time frame we had we figured we would, as with the pre-study, focus on picking diverse enough people to hopefully get very different responses. As we had a lot of material from our pre-study to compare with as well, we figured we had enough data to do so after interviewing four objects of both vegetarians and non-vegetarian consumers of MSP, especially when we also had a lot of material from our pre-study to compare and contrast with.

This time we also asked our interview objects to rate their own level of MSP consumption, as well as to fill out a week-long food journal to give us a better overview of their diet that allows us to also compare them ourselves.

Just like with our pre-study, all names have been changed randomly according to the ABCD-principle, and no identifying information has been used as seen in table 2. We again chose to create a more descriptive name based on their eating habits to make it easier to sort their responses, while avoiding the same descriptive from the pre-study, to not mix respondents from each study.

Name	Age	“Label”	Significant other	Level of education	Level of MSP consumption
Health-Elise	22	Pescetarian	Partner: meat-eater	Bachelor	High
Veggie-Frida	27	Pescetarian	Non-live-in partner: meat-eater	Master	Low
NonVeg-George	24	Non-vegetarian consumer of MSP	Partner: pescetarian	Master	Medium
Budget-Harald	47	Meat eater	Single	Bachelor	None

Table 2: Main Study Respondents

After we coded and sorted all the interviews as described, we went through each person alone for each of the sections, before summarizing each one and then using that and the topics from our code-tree to answer our research questions.

4.3 Results main study

4.3.1 The Shopping Round

Health-Elise

“I do not have a specific plan today, other than a nutritional and healthy dinner which keeps me full for a while.”

Health-Elise is a 22-year-old woman, who has been living in Oslo for three years. She just finished her bachelor’s degree and is currently working. She has been a pescetarian for about a year now and lives in an apartment with her meat-eating boyfriend.

We met Health-Elise at her local store, after she got off work. We walked into the store (Kiwi), and she started plucking food items of the shelves along the way. She first picked up a package of fresh pasta. She told us she normally plans what she and her co-habitant eats, but that she did not have a plan that day and therefore decided to do something very simple. Walking through the store she picked up a package of veggie meatballs but informs us that she prefers to make them herself.

“I think Rema1000 has a better selection of MSP than Kiwi. There they have a meatless minced meat, so that you can make veggie meatballs yourself. But I guess we’ll go with the pre-cooked ones today.”

We asked if she had tried the brand she chose before, and she said that she had, and that she preferred using meat substitutes when she was in a rush, and especially when she was cooking for both herself and her boyfriend. Sometimes they will make separate dinners, and sometimes he will cook something with meat on the side, but for everyday dinner it was just easier to make something they would both eat.

We continue further inside the store, and she picks up a carton of chopped tomatoes for her sauce. We ask if there is a reason behind her choosing chopped tomatoes instead of a glass of spaghetti sauce, especially considering her talk about just making something as simple as possible.

“I always buy chopped tomatoes instead of the prepared spaghetti sauce because it is often more nutritional when you cook it yourself. In addition, it is also cheaper as it costs only 5 NOK instead of the 40 NOK you have to pay for a spaghetti sauce. You really only need salt and pepper with this (chopped tomatoes).”

It seems as if Elise is more concerned with eating healthy, nutritional foods, and preferably simple food that she can make herself. She mentions that while meat-free food is good for the environment, and that played a part in her cutting down on meat, it was the health-aspect that made her give it up completely. When confronted about the plastic packaging of both the pasta and the veggie meatballs she says: *“I am working on my plastic consumption and try to avoid it as much as possible. However, I do wrap my vegetables in the fridge in plastic. That might be the biggest source of plastic in our household, but we do recycle all of it. I also use an aluminum water bottle at work, so that I avoid using the plastic cups that are there.”*

She does not pick up anything else and in the end, she ends up buying just the pasta, the box of chopped tomatoes and the veggie meatballs. She gets a plastic bag to put them all in and says that she uses them as trash bags at home.

Veggie-Frida

“I always start my shopping with checking what’s on offer (walks straight over to the ice box marked: 40% off, short durability)”

Frida is a pescetarian, meaning that she eats fish, but not meat, although she describes herself as a vegetarian. She is a student, currently working on her second degree, and lives alone in an apartment in the center of Oslo.

We met Frida at her apartment, and then walked over to the store together. She told us that she never really has a plan before she makes dinner, and that she still did not know what she wanted to eat, and therefore also did not know what she was buying. When we got to the store, she walked decisively over to the sale section to first see what was available there. On that particular day there were meatballs and meat slices, and therefore, no options for her, but she mentioned that she often bases her dinner around something she finds there, both because it helps her decide and because it is a cheap way of eating. *“And, of course, anything that means food isn’t thrown away is always good.”*

She decides on a pasta salad in the hot weather and so we start walking looking for the necessary ingredients. While choosing a salad she considers the amount of plastic surrounding the product, and ends up with her second choice as the first one she wanted was in a plastic box in a plastic bag.

“I try to avoid vegetables that are wrapped in plastic, but with salad there’s no option. This one even as an extra layer of plastic...I do want this one though (long pause)”. (Us: Don’t look at us, we’re just watching) *“Yeah, but I’m judging myself. I’ll take the other one instead, it has just one layer of plastic.”*

When shopping her main reasoning is all tied to the environment. She puts her tomatoes straight in her basket without a plastic bag, avoids wrapped products, and tries to just buy exactly what she will need that day, and the next, to avoid throwing things away. Several times while walking around the store she lists the vegetables she has at home, as she narrates her thought process. She avoids products with soy and is skeptical to organic food which she worries requires too much water to be feasible for everyone. *“I’m going to pick the non-organic one, because it’s cheaper, and also because I’m not sure how much better the organic one is in the long run.”*

We further ask her more about the soy, as that is a common ingredient in a lot of vegetarian food. *“I haven’t really gone in-depth on soy, but I’ve heard that it’s not a very environmentally friendly alternative, and therefore, I just think that it’s an easy thing for me to not buy. If someone serves it to me I’ll eat it, I’m not, like, scared of it, it’s just not something I need or feel like I should support.”*

At the end she bought fresh tortellini with spinach and ricotta, an avocado, one lime, two tomatoes (without plastic bag), one bag of arugula salad, one fresh mozzarella and a lip balm. She goes through the self-check-out and puts everything in her homemade shopping tote. *“I try to always bring my own bag to bring my shopping home, but I haven’t started trying to bring my own small bags, like I’ve seen some people do to avoid using the small plastic ones. Instead I just don’t use any bags for that at all.”*

NonVeg-George

“My plan is to save the world by cutting back on meat, through tasty and nutritious meals.”

NonVeg-George is a 24-year-old man, who has recently finished his masters. He is now working in Oslo and lives in an apartment with his girlfriend. His girlfriend mostly eats a vegan diet because of allergies and intolerances, while he is a meat eater, who sometimes eats MSP at home. *“I have a vegetarian diet when I eat at home with my girlfriend, but I eat meat when I’m not with her.”*

We meet George outside of his local store, Rema1000. He just got off work and does not really have a plan for his dinner today. He is cooking for both himself and his girlfriend, and he informs us that the dinner will be vegetarian-friendly. We enter the store, and he immediately states that he is not really that hungry and wants to do something simple. *“I think I’ll go for a pasta salad today. I know we have some vegetarian chicken in the fridge, so I’ll just get some pasta and vegetables.”*

He picks up some gluten free pasta made of lentils and informs me that his girlfriend suspects she might be reacting to gluten, so they are testing out different alternatives to see if that helps. As she has specific dietary restrictions he often ends up basing his shopping around her for every day meals they eat together.

He also picks up a crème fraiche product from Oatly, meaning it is dairy free and oat-based, and again informs us that his girlfriend is also lactose intolerant. In the

end, he ends up buying lentil pasta, cherry tomatoes, corn, asparagus, Oatly crème fraiche and a bottle of Pepsi max in a quick shopping trip.

Budget-Harald

“A part of the reason I started eating vegetarian was simply because I had a pretty bad economy when I was young. And about fifteen years ago, meat was very expensive, but now meat is insanely cheap.”

Harald says he always brings a shopping list to the store, a habit formed back when he had very little money and would travel for a bit to get to the cheaper stores. We meet up outside the shop, and he starts by apologizing for this being a bit of a different shopping trip for him as he is leaving that night for a long weekend. *“Normally, I shop for the whole weekend on Friday, but now I’m just getting things for dinner today, and some small things for a late snack when I get home Monday night”*.

He walks determined through the store, as he talks about how he started eating meat free dinners because of his financial situation. *“Half a kilo of minced meat in NOK is basically the same now that it was twenty years ago, right. So back then it was a lot more expensive.”*

Vegetable casseroles and beans were a good way of filling up on a small budget for him and his daughter. Now that he has a more stable economy, he likes to buy the things he feels like eating, instead of the cheapest option, but he still does not like to waste. *“We used to eat this casserole just on its own, me and my daughter, but now that I can afford it, I enjoy having a bit of salmon with it”*.

He likes to shop effectively, with a plan and without unnecessary rambling, and as he walks, he is always a few steps ahead no matter how fast we try to keep up. He normally buys in bulk to save time and money by making larger amounts of food for freezing. This also fits with his schedule which revolves around weeks of night-and day shifts and does not always allow him the time he would prefer for cooking. *“Now that I’m not going to be home for a while I am just planning on making half*

the amount I normally would make, especially because this is the type of food that's even better the next day."

He ended up with two pieces of salmon, a celery, a box of feta cheese, one lemon, carrots, cream, an onion and scallions. He has his own bag with him to carry it in. *"It is easier to bring my own, and then I also don't have to fill my house up with unnecessary stuff"*.

4.3.2 Discussion Shopping Round

Our main thoughts when looking over the data from the shopping round is that it gave us a quick access into the different motivations people had for choosing MSP for dinner, as well as their routines and habits related to dinner. We have heard talk of money, health, and the environment, as well as consideration of others, meaning that we can assume that we have at least one representative for each of the main motivation types that came up during our research.

There also seem to be a link between the main focus of the shopping round and their self-described way of eating. We can see this with Budget-Harald, the only person we followed with both a plan and a shopping list, whose focus is on saving time and money through bulk buying and planned dinners, leading to fewer trips to the store and less money spent. This fits well with his focus on price which is the main reason as to why he started eating less meat, but also shows us the power of habit.

In contrast, NonVeg-George does not focus or mention price at all. Instead he talks about how his girlfriend's dietary restrictions affect the choices they both make when it comes to what food they buy and eat. The fact that his girlfriend generally needs to be very careful about what she eats, has probably helped shift his focus to the food itself. His motivation for choosing meat-free products does not seem to be based on an intrinsic motivation. As he considers himself a meat-eater, his girlfriend is the reason he mostly eats vegetarian. Their use of MSP is interesting, especially when we remember Vegan-Dina and her use of MSP to get her boyfriend willing to eat the same food she would. It seems possible that MSP is a way of compromising around not having meat for dinner. Being motivated to only cook

one dinner does in general seem to lean towards less or no meat in all situations where one person in a family chooses to not eat meat.

Health-Elise seems more motivated for health and environmental reasons. She states that she typically chooses healthy options, instead of quick solutions. Having struggled with acne in her past, she is very aware of her dietary choices. In addition to being lactose intolerant, she also tries to eat gluten free. Her motivations are mostly intrinsic, except for caring for the environment.

Veggie-Frida mainly focus on what choices affects the environment the most when she is in the store. This is most obvious through her long pause over what salad to pick, but also through her browsing of the discount shelves. She avoids soy products, a classic ingredient of MSP, and instead, focus on the fruit and vegetables section. She seems completely uninterested in processed foods and alternatives to meat and tends to go for classic vegetarian dishes and ingredients.

4.3.3 The Food Diary

We created a simple table (table 3) to easily compare the different meals of the different respondents, as well as a color coding system to more easily compare the amount of different types of meals. We decided to code into five different categories; Meat (red), fish and shellfish (blue), solely vegetable based (dark green), based around a classic vegetable protein option like beans or chickpeas (light green), and a more “classic” MSP category (yellow) for things like soy hot dogs or veggie burgers.

	Health-Elise	Veggie-Frida	NonVeg-George	Budget-Harald
<i>Day 1</i>	Cod and vegetables	Vegetable lasagna	Angus burger	Crabstick salad
<i>Day 2</i>	Vegetarian fajitas with mushroom	Spaghetti with peas and tomato sauce	Burger and fries	Bratwurst and potato salad
<i>Day 3</i>	Pizza Margarita	Veggie hot dogs	Indian with chicken	Chili con carne
<i>Day 4</i>	Vegetarian Indian with chickpeas	Leftover vegetarian lasagna	Pepperoni pizza	Sushi
<i>Day 5</i>	Salmon, potatoes and vegetables	Too Good To Go (Focaccia with shrimp)	Biff with pepper sauce	Chili con carne
<i>Day 6</i>	Pasta with chickpeas	Veggie hot dogs with salad	Cod with vegetables	Veggie pizza (four cheeses)
<i>Day 7</i>	Monkfish with vegetables and fries	Red curry with vegetable mix	Tapas, cheese and ham	Trout and baked vegetables

Table 3: Food Diary Overview

We can easily separate the two vegetarians from the two meat eaters, but we can also see that the selection shows very little use of replacement products that mimic meat. This seems strange compared to how much people say they consume MSP, with the only clear example being veggie hot dogs from a barbecue, and then the leftovers from the same purchase later in the week.

What we can see, is that the two respondents who seemed the most interested in eating healthy, Health-Elise and Budget-Harald, are the ones with the most fish in their diet. Whereas Veggie-Frida has a weekly menu mostly based around leftovers and a majority of all dinners are based around vegetables, without fish or meat. NonVeg-George has been eating mostly meat, making us believe that he has not

been eating with his girlfriend for most of the week, making all of these food diaries seemingly fit the diets described to us.

Health-Elise

Elise has been on vacation and informs us that her week menu is not representative to her everyday life. Having spent two weeks in Spain, she has not cooked a single meal herself, but rather ordered what she wanted and staying away from meat.

She says that meat is a central part of the Spanish food culture, with MSP not being well represented in that market, at least not yet. However, with Elise being a pescetarian, she had been able to enjoy great seafood paellas and local produce.

Elise's food journal consists of zero meals containing MSP, but there are also zero meals containing meat. She informs us that all the restaurants she visited had some kind of a vegetarian option, with some being better than others. As she normally cooks all the meals herself, she mentions being on holiday as also having a vacation from being as strict about her diet as she normally is. Instead, she focuses on trying new ingredients and combinations, but she still makes sure to completely avoid meat.

Veggie-Frida

Frida has a food diary where we can see, almost, the order of the meals even without knowing. She made vegetable lasagna, had leftovers for lunch the next day, and ended up just having a small portion of spaghetti with peas for dinner ("because it was quick and easy and it was too hot to make more effort"). The next day she had soy hot dogs, because she was in a birthday in a park, and the next day she had the last bit of lasagna. The next day she ordered a bag from Too Good To Go, a service where you can buy leftover food from bakeries and restaurants, and had the contents of that for dinner; a shrimp sandwich and a big cinnamon bun. The next day, she fried up the last of the hot dogs with a quick salad, to make sure that she finished them in time, and then the last day she made a vegetable red curry which she "had wanted for days", but "had to" postpone until she had finished all her leftovers.

We can easily see what she described as we were at her house; a strong drive to not throw food, and a focus on quick and easy meals that she can make on her way out to dance, or class, or work. We can see that for most of these meals she mainly eats vegetables as the main ingredient. With exceptions of the hot dogs and the shrimp sandwich, there are no main protein source really substituting for meat.

NonVeg-George

George said during the interview that he normally eats: *“a lot of vegetarian food, and fish, like fish burgers. I also enjoy tacos with the Meatish minced meat.”* However, this is not the main impression his food diary gives, and so we are interested to discuss it with him. George informs us that he has been on vacation without his girlfriend, and therefore his food diary is not representative for how it would normally look when he eats at home. His week menu consists of mostly meat, and one dinner containing fish. This fits with his earlier statements about being influenced by his girlfriend to go for more meat-free alternatives, but it is also possible that there is mostly meat because he normally does not eat it except when eating out, and that this would not be representative if it had been a longer period without his girlfriend.

Budget-Harald

It is easy to see when looking at Harald’s food diary that he is a meat eater, when compared to our two vegetarians. But what is also obvious, is how many colors are represented. When we also know that the chili con carne he had twice for dinner was made with about 200 grams of meat for about 6 portions (four that he froze), and that he only ate one bratwurst, instead filling up with potato salad and asparagus, the picture becomes even more balanced.

There are three meals with meat, but only the bratwurst dinner had meat as the main role in the dish. He had three dinners with fish/crab sticks, and one vegetarian pizza that can be counted as MSP. This wide variety of meals fits well with his statement of eating what he wants, while not being wasteful. It is easy to see his food philosophy in this diary; he uses little meat, compared to the average of a Norwegian adult man, prefers to cook in bulk and save his money for eating out, and enjoys both food and cooking.

4.3.4 Discussion Food Diary

Through the food diaries we had a chance to see the results of the respondents' different views on meat, MSP and meat-less eating. This gives us a chance, especially when used together with the information from the shopping round, to get a more complete picture of how our respondents eat and shop.

Of course, we had to consider that two of the respondents were on vacation while filling out the form, but with Health-Elise, this should not really affect her choices when it comes to not eating meat. Her main motivation is related to food choices that she believes are the best and healthiest for her, and even if she does not eat that much pizza and fries in a regular week as she does when eating out, we can still see that she is avoiding meat and dairy.

As we have already mentioned in the part related to NonVeg-George it is hard to say how much of his meat consumption is related to being on vacation, and how much is related to eating without his girlfriend. It does show that he is not motivated, or interested in, completely changing his diet to a meat-free one, but ideally this food diary should be compared to a regular one where he is at home.

Both Veggie-Frida and Budget-Harald wrote their food diaries for regular weeks of their lives, and we can see that these diaries match better with the meals they cooked when we were present, and with the food philosophies they described. These two also stand out from the two others as they have made a choice to eat less meat over a much longer time, and also do not have to consider someone else's preferences in their cooking or eating habits.

4.3.5 The Cooking and Interview Session

Health-Elise

We cooked in one of our apartments, as it was closer to Elise's workplace. She was comfortable in the kitchen as she had been over many times before and immediately started collecting the pots and pans she planned to use. We asked her if she could explain why she became a pescetarian in the first place.

“First and foremost, because of my skin. I had been struggling with acne for years, until I saw a lot of articles online about how cutting back on meat can help balance your hormones and improve your acne.”

Elise informs us that her skin looks better now, and we conclude from this that her motivations are health and aesthetic reasons and that, as she states, the environmental benefits are a bonus. She talks about how she also noticed other positive changes in how she felt when she started cutting back on meat, and how she started finding a lot of information about the meat industry and the effects of meat when she started reading more.

“In addition, consumption of meat and especially processed meat, is linked to cancer. You can read about it in a report from the World's Health Organization.”

This is the first time she mentions something that reminds us of a more political, vegan mindset. She says that she gets her information from watching documentaries, reading reports and articles.

While she is cooking the tomato sauce, she adds salt and pepper to the mix. We are interested in hearing more about this self-researched view on vegetarian and vegan diets, and asked her again about her thoughts on eating meat free in a larger perspective.

“You do save the environment, by stopping the meat production industry. In addition, many of the animals are treated badly, like e.g. cows where their udders are ten times larger than they should be, and they walk around in pain for people to be able to drink milk. Even in Norway.”

This is something we also heard mentioned in our pre-study from people who had watched documentaries, like “Cowspiracy”. Vegan-Dina also mentioned this as typical of what vegan blogs and Facebook groups she followed would share, as well as certain friends of her that would share it on Facebook with strong messages intended to shock people of their milk and cheese consumption. We follow up on

her thoughts on dairy products, as vegetarians and pescetarians typically would allow these types of foods into their diet.

“I try to avoid dairy products, because it gives me acne. That’s why I eat a lot of Oatly products. I also eat vegan cheese.”

As she cooks the meatballs the pasta is now boiling. It is easy to see that she has made this dish a hundred times before, as she mentioned, only with homemade meatballs. We ask her to explain her history with meat consumption.

“I eat meat if I’m visiting e.g. my in-laws. I will not say no if someone has been preparing food for me. But when I can choose myself, I never buy meat. I have eaten a lot of meat throughout my childhood, like “fårepølse” for breakfast every day. But I do not miss eating meat, other than “fårepølse”, “mør” and “spekeskinke” (fermented ham), which are different kinds of salty ham. I miss this pizza I used to make with “spekeskinke.”

Although she allows herself to consume meat when it is served to her, she does not allow herself to eat the kind of meat she really misses. We want to know what types of products she wishes companies would put out on the market to not make her miss those kinds of meats so much.

“I wish there were more vegetarian product for breakfast and lunch, like spreads for bread. I also wish there were substitutes for chicken, bacon and steak. But it is mostly products to put on my bread that I miss.”

Having tried multiple substitutes for chicken ourselves, we informed her that there are several chicken substitutes on the market now. The brand Quorn has different chicken substitutes, as well as the Swedish brand Oumph!. This makes her excited and she says that she will try them as soon as possible.

Veggie-Frida

Frida lives close to the store, so we follow her into her apartment, and watch as she takes out the rest of her ingredients from her seemingly quite empty refrigerator. She laughs about how this feels a bit like holding a class in home economics while she washes her hands. She cooks quite a lot, but does not find it very fun, so unless she has people over, she tends to make things quite simple. She starts by offering us both a large glass of water after escaping the heat outside and continues by turning on the water for the pasta, before starting to clean and cut the vegetables.

“I normally tend to wash, cut and prepare everything before I get started, but obviously, with a pasta salad it’s just positive if the pasta is the first thing finished, so I’ll start with boiling some water.”

We ask her if she wants to start with just talking a bit about how she eats, especially because of how many decisions she seemed to make and consider during the shopping trip.

“Well, I mostly stopped eating meat because I don’t really like the taste of meat. But then, of course, it’s also good for the environment, which is my main motivation. And then it’s also nice to not kill animals, but I do eat fish, which is also an animal, so I can’t really claim that I’m thinking too much about animals, I guess. At this point, I haven’t eaten meat in seven years, so it just sounds really gross to me as well.”

She laughs again at how she guesses she has more than enough reason not to eat meat, but at the same time still eats fish and shellfish. We try to ask her about MSP, but she struggles a bit to define what that means to her. She substitutes burgers with fishcakes on the grill, more vegetables for beef in pasta sauce, and she substitutes chicken with beans in fajitas, but she does not really consider either of those to be something she chooses because she cannot eat meat, instead starting with what she does want to eat. Finally, when we discuss barbecuing, she lights up.

“Oh! One thing I did miss when I started not eating meat was all the options for barbecuing! I do love fishcakes, but you do get kind of tired of it over a whole summer. Now, there are so many options for me! Both burgers and sausages, and they’re available almost everywhere so I can easily join my friends out even if we haven’t planned it in advance! I guess that’s the one actual replacement product that I really like and use almost regularly, especially in summer.”

We talked a bit about why she is not really interested in replacement products outside this very specific scenario, and when she thinks about it she decides that it is because MSP seem very easy and quick, which is good when she suddenly needs food for certain situations, but because she normally only cooks quick and easy things anyway, it is not something that she misses in her regular day-to-day cooking.

“A regular dinner for me, is normally a lot of vegetables and quite often based around some leftovers. I hate throwing away food, so I try to always plan my dinner based on what I already have in my fridge.”

We mention that we noticed that she seemed very conscious of what her food was made of, as well as how it was packaged, and asked if she thought this might be related to her non-use of the most common MSP products. She answered that since everything is in plastic, she does not let that stop her from buying something she wants, it is just when she is choosing between two options that she always tries to choose the less packaged option.

“I used to go shopping at Grønland, where it’s easier to avoid plastic, but I’m so bad at planning my meals that it became too difficult. I was never able to buy for more than maybe two days at a time.”

As she opens her fridge to show us that it is almost empty, I notice a meatless “servelat” option from Coops “vegetardag” series and ask her about it. She mentions that she did not think about it when we were discussing meat replacements earlier, because she assumed we were talking about dinner, but that she did find

being meat-free more of a challenge when it came to what to put on bread, especially for breakfast and lunch.

“If you don’t eat meat, there’s really only cheese or jam you can have on your bread. Or “makrell i tomat”, but I don’t really feel like I can bring that with me in places, because I know many people hate the smell. So now I’m testing this fake pepper-meat slice thing from Coop, and it’s okay, just for some variation with my cheese, and that is a specific fake meat replacing product, but I do think I just bought it because I wanted some more variety and not because I specifically missed meat.”

She decides that she might buy more MSP for lunch and breakfast if they were available and tasty, but that it probably ties to her thinking lunch and breakfast are very boring meals and just wants an easy accessible option for variety. She laughs; *“Just like what I said I didn’t really need for dinner.”*

NonVeg-George

When we get back to George’s apartment, his girlfriend is also back from work. He starts emptying the grocery bag, and she takes the meatless chicken out of the fridge. He starts chopping the vegetables and turns on the oven plates for the pasta water. We are curious as to why George decided to cut back on meat, even when not eating with his girlfriend.

“It is good for you (to cut back on meat), and it makes me eat more fish. I don’t know if I would have cut back, if it hadn’t been for my girlfriend, though.”

For George, the social influence of his girlfriend is a crucial factor for his action of cutting back on meat. We follow up the general discussion about what you can eat if you do not eat meat and ask him what he thinks of cutting back on meat in a larger perspective.

“I think more people should eat less meat. I’m not saying that everyone should become a vegetarian, or a pescetarian, but everyone benefits from eating less meat

and considering which meat they eat. E.g. you should not choose the cheapest chicken or minced meat, which is probably produced in a poorly manner. You should rather buy quality meat but limit your intake and be more conscious”.

We could not help but to think that George contradicts himself. Earlier, he stated that he probably would not cut back on meat if it was not for his girlfriend, and now he states that he thinks more people should cut back on meat consumption. Could this be the social desirability bias kicking in?

The pasta salad is coming together, and we ask him whether he thinks chickpeas or beans could replace meat for him in a regular dinner.

“No, I’m all about the meat substitutes there, like soy hot dogs, mushroom burgers etc. Yesterday we ate the Meatish minced meat, and the day before that we ate those Meatish nuggets from Rema1000. I also like those burgers from Linda McCartney.”

There seems to be quite a lot of MSP which he enjoys the taste and texture of. At the same time, he makes it clear that he misses meat, as he only eats it when eating out, or when he is making dinner for himself, without his girlfriend. We wish to know what the producers of MSP could do better to make him consume more of their products.

“Some of the products have a distinct flavor, like BBQ. It does not go well with everything, so I wish there were more basic products, which you could use for spaghetti and pizza. Something more like just regular meat.”

He adds something which we had also heard from several other participants, regarding spreads for bread, for breakfast and lunch:

“Lately, I have limited my intake of salami and meat for breakfast and lunch as I ate it all the time. However, that leaves cheese and chocolate spreads to put on my piece of bread, which gets boring very fast.”

Budget-Harald

On the short walk back to Harald's new apartment he asks us about our paper, about who we have talked to so far, and seems very interested in the whole idea of MSP, which he claims he does not think he has ever eaten.

"I mean, of course I've eaten things that substitute for meat, but not ever a product that I bought finished and... let's call it ready for eating, which is the associations I get when you say "product" specifically."

He says that he of course would be interested in tasting it if it was served to him or easily available, and then he seems to catch himself and starts talking about how most of his experience with vegetarian "meat" products have been his daughter bringing them home for Christmas dinner and how that is not really a situation where he is interested in trying something new at all.

"Compared to a regular meatball, I'm sure they are much more tempting than compared to my mother's "juleribbe" (Christmas ham)."

He says that he loves to cook, and that he tries to limit using meat when cooking. He says he is inspired by the Chinese, where he says that they use meat more as a seasoning than as a main component, for example by making pots on bones and then just adding vegetables to that. This type of philosophy is also linked to the reasoning behind him trying to cut back on meat.

"There are no moral reasons behind me trying to eat less meat. Mostly I'm thinking about all this sustainability talk. That if everyone in the world would start eating the same amount of meat as us in the west, everything will go pretty bad quickly. I guess that's a moral reason in itself, but it's not tied to animal rights or anything like that."

He also mentions getting older as a reason to start cutting back for more personal reasons, related to health and weight. It is clear that he also sees meat as something that makes you gain weight and feel heavier, just like what we have heard from "Health-Elise". This, as well as his experience and level of comfort in cooking

without meat, means that vegetable dishes like falafel and chili sin carne, always have seemed more appropriate for his lifestyle than a soy burger.

“If I was motivated by animal welfare, I think vegetarian beef and things would be more tempting to me. But because I’m trying to be healthier, I feel like fish and vegetables are probably better for me than more processed foods. If I want a burger, I want a burger, then I’m not picking a healthy option instead.”

The most important thing for him when it comes to food, is cutting back without feeling like he is depriving himself of anything. He just switches some options with better ones, instead of cutting anything out completely. He discovered he likes falafel more than he enjoys regular kebabs, so he switched them out completely. He knows that he just needs about 100 grams of meat in a pasta sauce for it to taste like meat, so he does not use more. Instead, he fills up with beans and vegetables.

“For me the most important thing is to be more conscious of eating less meat, not what I’m switching it out with. And eating less of it than I did, and less than the average person.”

While he expertly cuts vegetables, boils water, offers us a snack and a drink and hums along to the radio, he mentions how he tries to live his life like this in general. A night of binge-eating just meat and watching a movie is not a problem if it just happens once a month, but eating healthy will become impossible if you think of it as a way of denying yourself things that you like. That is why he enjoys edamame beans, which we have been presented with while we are waiting for the vegetables to be cooked. They are salty, spicy and delicious, but healthier than potato chips, and cheaper as well, he tells us. Switching out meat for fish is a similar choice for him, where he feels the alternative is just as good as the meat option or buying the vegetarian spring rolls because they are just as good, but cheaper.

“I guess I’ve never thought of fish as a substitute product because I love fish, but I do use it in situations where I guess others would use meat, so I guess it kind of is.”

4.3.6 *Discussion Cooking Session*

There were many differences focuses in the cooking sessions. The focus was mostly on time and ease, which we can see as most of the meals we joined were quite quick and simple dinners, made in about thirty minutes, whereas Budget-Harald spent around an hour and a half, including oven time. He was also the only person to make more food than for just one meal, planning to freeze down some portions.

Most of the meals were just made for one, although everyone offered to make food for us as well, except for NonVeg-George, who were also cooking for his girlfriend. Veggie-Frida was studying for an exam, but everyone else made dinner after a day at work, making it likely that they followed the same routine they use every day. We had two meals using processed, finished MSP, in addition to one meal with fish, and one with just vegetables and cheese, giving us a wide variety of meatless dinners.

Everyone we spoke with seemed pretty pleased with the selection of MSP for dinner, and also felt like they had many options outside of pre-packaged meals. However, we observed complaints about options for other meals. We now start to see a gap in the vegetarian product market. As the MSP for dinners increase, not a lot has happened for the remaining meals of the day; breakfast and lunch, where there seems to be fewer options.

5. Results and analysis

Based on the results from our data coding, we have split our results into the three themes we found. We will discuss all topics based on both the pre-study and main study, the literature and our own data, to answer our research questions in the best way possible. We will also try to look for the best path forward in future studies by creating a model that can be used with future quantitative data.

5.1 Understanding of MSP

5.1.1 What describes the main purchasers of MSP in this sample?

Social factors like the people around us, our friends and family, affect the way we act also. If someone in our social circle, like e.g. a girlfriend, has a certain eating habit, you are more prone to adopt those habits yourself. This goes for our participant NonVeg-George, who is very much influenced by his girlfriend.

Personal factors such as budget and age are particularly important for Budget-Harald. He stated that he used to be on strict budgets in his youth, and that that way of eating has stuck with him. Price is also a major factor for Veggie-Frida as a student with a part-time job. She mainly avoids MSP as they are more expensive than e.g. chickpeas. We will touch more into psychological factors when discussing motivation, but for instance learning and beliefs played a big role for Health-Elise, as she had learned through the internet that the consumption of red meat is linked to cancer, which makes her see meat as a threat, and avoid eating it for health reasons. This seems to be a driving factor in her meat-free diet.

Hoek (2004) found that non-vegetarian consumers of MSP, like our participant NonVeg-George, are more likely to find price and quality to be important attributes to MSP. As stated in his interview, he believes that people should eat less meat, but choose quality meat when purchasing it. Hoek (2011) found that in order to target consumers like George, the focus should not be on ethical arguments, but rather to improve the sensory quality and resemblance to meat. This works well with George's perception of MSP, as he does not consider chickpeas to be a worthy meat substitute. Hoek (2011) also found that having a housemate/partner who is positive about MSP, contributes positively to a higher consumption of MSP. As George stated, he probably would not have switched his meat for MSP if it had not been for his girlfriend. As his girlfriend has special dietary requirements on top of her pescetarian lifestyle the factor of her diet plays a large part in what George buys, eats and has available at home.

Hoek (2004) also found that vegetarians had a more positive attitude towards the importance of product information and health than meat consumers. This does

apply to Health-Elise, as she is the most health-conscious of all our participants, and also the most positive towards MSP. For non-vegetarian consumers of MSP the quality and taste and similarity to meat weighs heavier (Hoek 2004), as it does for George who would not consider a dinner with beans as the main protein to be a proper dinner.

Based on previous research, we would expect people with a higher education, a higher income and a higher social status to eat less meat. However, for our small sample, we see that the person who has the highest education, is also the person with the highest meat consumption.

Things like budget and life situations affect how much time and money people have to spend cooking, and also in large part what type of food they can afford to buy. Our sample is mainly in safe, economically stable positions, with only Veggie-Frida, the one full-time student, and Budget-Harald, talking about the past, mentioning budgeting or checking the price of products in store. None of the respondents have children living at home, which could also affect what type of food they are cooking, and only Harald works a job that is not a standard 9-5. This is also something that comes across in how he cooks food in advance for the days where he works nights.

It should also be mentioned that our sample is quite well-educated, with all respondents having some form of higher education. As such our sample is not representative for the larger population and we do not want to conclude anything based on this, but it should be focused on in a larger study.

5.1.2 What type of MSP do they buy?

We did discover a bit of a generation gap when it came to experience and knowledge of MSP. Harald was the only one we spoke to who had not even tried any MSP and did not really have much knowledge about them either. The little he was aware of were things he had learned from his vegetarian daughter. In contrast, Veggie-Frida, who was the least positive to specific MSP, and did not see the need

for it, did have meatless breakfast sausage in her fridge and soy hot dogs in her food journal.

All participants in the main study agreed that fish was a meat substitute, and most would also call it a meat substitute product in the same way of a tofu-burger. This means that Vegan-Dina was the only one who did not see fish as an alternative to meat. We found this interesting, as both vegans and vegetarians consider fish an animal, and therefore abstain from eating it, but as none of our respondents were motivated by animal welfare, this does make sense. Fish was also considered the healthier option when compared to both meat and processed MSP.

The most popular types of MSP based on our research seems to be direct replacement products, like veggie-meat balls or burgers, as well as fish. There was little use and talk of beans and lentils and food that has traditionally been seen as main parts of a vegetarian diet. It seems that the understanding of what is a substitute for meat is expanding, and in further research it would be interesting to see if this is part of what works to increase the percentage of consumers that sometimes eat meat-free.

5.1.3 *Other factors related to understanding of MSP*

Other factors that seem to relate to how our respondents understand meat-free eating and meat substitute products are things like cultural factors, social factors and psychological factors.

Through all of our interviews, as well as our general research, the cultural focus on eating meatless keeps coming up. The increased focus on the environmental impact of meat, mentioned by everyone we spoke to, even the ones who did not really consider that to be their main motivation personally, as well as the consensus about the health benefits of a diet with less meat, shows that there is a general belief in the Norwegian society at the moment about the positive effects of meat-free eating. This reminds us of the subjective norm as defined by Ajzen (1985) with people perceiving a societal expectation of attempting to decrease meat consumption.

Another factor that kept coming up as a main reason behind food choices was peoples living situations, and what the people around them ate. Respondents with people around them who ate vegetarian or reduced their meat intake, were more positive towards eating meat-free, more aware of MSP and had more options to easily choose to eat meat-free.

Perhaps most importantly, what separates the people we have spoken to, and why and how they choose to eat meat-free, seems based in psychological factors. The different perception they have of meat, including perceived threat of meat-eating and the perceived benefits of how different diets affects how positive they are to meat, while their attitudes towards things like processed food and soy affects what type of MSP will be most interesting to them.

Their previous experiences, knowledge, and attitudes also affects what type of motivation they have. The differences in motivation seems to have a large impact on the extent people go in their dietary choices and is something we will go deeper into in the next section.

5.2 Motivation for choice of MSP

Motivation is the reason for people's actions, desires and needs (Richard, 2000). When it comes to choosing to eat meat-free, motivation seems to be based on people's perception of the results of changing their diet. These results can be things like to lead a healthier lifestyle, contribute to animal welfare or to help reduce the carbon footprint, but also things like improving their skin or losing weight. All of these have been mentioned by our respondents, and we are interested to look deeper into the results of these differences.

5.2.1 What motivates purchase or non-purchase?

In our studies, the respondents refer to MSP as something easy and quick to make for dinner. It is also often a compromise between a vegetarian and a meat-eater, as it is similar to meat. An example that came up, is e.g. Frida going to a barbeque. Being a pescetarian, she finds it much easier to buy her own vegetarian hot dogs,

when going to the store with everyone than buying a piece of fish or having to go home to prepare something. For meat-eaters, MSP makes it easier to cut back on meat, as you cook a vegetarian burger and a meat burger the same way, in the same amount of time.

Also, most of the Norwegian population consider cutting back on meat as a step towards a healthier lifestyle, as stated earlier by half of the population planning on reducing their meat intake. This means that most people believe that meat is not good for you in the long run, and therefore are interested in cutting back for health purposes. We have also seen a lot of news articles, television programs and movies focusing on the environmental impact of the meat industry, as well as animal welfare activists sharing videos focusing on the ethic side of meat consumption.

5.2.2 Do they differ across sometimes meat-eaters and non-meat eaters?

The motivations do seem to slightly differ between people that never eat meat and people that sometimes eat meat-free, although we do not have a large enough sample to state that this is indeed a fact. From our sample we can see that the sometimes meat-eaters seem more focused on either the environment or the positive effects of meat-free eating, whereas the non-meat eaters focus more on the negative effects of eating meat, for example as related to skin or body.

Meat-eaters also seem to have more of a need of meat-free options being more easily available, and more easily used than non-meat eaters. This would be another topic that could be investigated further with longer food diaries from meat-eaters that sometimes eat vegetarian. Therefore, meat-free options that are easily available and also easily used in the dishes they already eat, are more tempting for them than for people that have changed their way of eating entirely.

5.2.3 Do the different reasons vary in strength?

We could not help but to notice a pattern amongst our respondents. Those who are intrinsically motivated, e.g. Health-Elise, eats less meat than those of our respondents who are externally motivated, like NonVeg-George and Budget-

Harald. It would be interesting to go deeper into this and see if there is a difference here in people that have cut out meat completely being more self-motivated, whereas people with more abstract goals just cutting down.

This could mean that if our goals regard ourselves directly, this creates a stronger motivation. With people like NonVeg-George, who is mostly motivated by his girlfriend not eating meat, his goal lies outside of himself, which makes him more distant from the goal itself. This could mean that his motivation is based on her presence, which can be manifested in his food diary.

5.3 Situations for MSP use

We eat differently based on when we are eating, who we are eating with and where we are. Our own personal situation also affects how much time and money we have available, which also affects what choices we make, and choices we can make, when it comes to food.

5.3.1 When do they consume MSP?

While interviewing we mainly focused on dinner, as that seemed like the most interesting meal, based on our pre-study. However, many of them stated that the MSP dinner selection was getting better and better, whilst the MSP selection for breakfast and lunch were still insufficient. This makes it easier to replace meat when eating dinner, but still makes it a challenge for the other meals of the day.

This could mean that instead of what we saw as an increasing need to replace meat for dinner, perhaps due to a tradition-based view of what dinner is, being the reason for the larger amount of dinner focused MSP, it could be the other way around. By looking at the increasing options of “Vegetardag” by Coops vegetarian breakfast selection, it could be a sign that regular consumers who are just interested in eating less meat will buy substitute products for every meal if they are tasty and easily available.

5.3.2 *At home, at work, in restaurants?*

Our participants all cooked at home during our interviews, and this, along with them knowing the topic of the interview, resulted in all of them making meatless dinners. Looking at their food diaries and their description of their own diets it seems that there are two main styles of eating based on situations; there are the people who eat mostly meatless at home and sometimes has meat when going out, making meat something that is appropriate for special occasions but not for every day life. In the same category we would put the people who eat meatless at home, but eat meat if it is being served to them or if someone else has made it for them.

We can see this in two of our participants, Health-Elise and NonVeg-George, who ate at restaurants in their food diaries, which made them able to choose what they really want to eat without having to give any concern to the others they were with. This resulted in Elise still eating only vegan, vegetarian or pescetarian dishes, whilst George had meat for most meals showing that the effect of the same situations gives different results to different people.

5.3.3 *When eating alone or with others?*

Whether our participants eat MSP when eating alone or with others, seems to depend on their meat consumption. George, for example, only consumes MSP when eating with others, in this case, his girlfriend. This is backed up by his food diary, as it only contains meat from the week he was not eating with her.

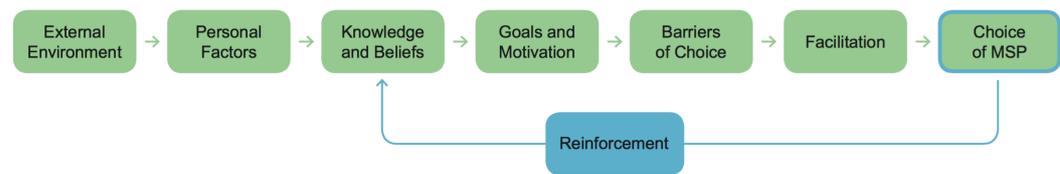
However, even though Elise is a pescetarian at home, she would still eat meat if it was served to her as she does not wish to offend anyone who has been cooking for her. This tells us that she will deviate from her diet, when feeling pressured to do so.

When eating dinner at home with others, one normally cooks one dinner for everyone. This makes it difficult to please everyone around the table, especially if you must consider that one might be a vegan, one might be lactose intolerant and another one may eat gluten free. But in summer, at barbeques, you typically buy what you wish to eat yourself, and it is therefore easy to choose vegetarian sausages, even though everyone else might choose regular sausages. They look alike, the

texture is about the same, and you eat one at a time, which makes it easier to customize as opposed to, for example, the “Meatish” minced meat.

5.4 Model for MSP consumption

The process of choosing and continuing to choose meat-free options is based on many different factors, as we have discussed through this paper. To show what leads people to choose meat-free options, we have created a simple process model as shown in Model 1:



Model 1: Process model

We believe that the entire process starts with the effects of the society we live in, and the people we surround ourselves with. This is all included in “External Environment”, where we also include things like the effects of media, of friends and partners, the general focus in society on meat and meat-free eating. Meat-Free-Mondays, the introduction of new products, bloggers and influencers discussing their diets, and documentaries on TV and online, all work together to introduce reasons to eat meat-free, and ways to do it.

How this affects you, and what information you pick up and remember, depends on “Personal factors”. Some people are more interested in food, animal welfare, or health, and the information and impressions they gather will depend on these personal factors. Previous experiences, family traditions and where they live, will also affect how they eat, and how open they are to new food options and alternatives. This creates new knowledge and beliefs, like for example Health-Elise who believes that meat causes cancer because of a fear-mongering article, or Veggie-Frida who believes that soy products are bad for the environment without remembering where she read it. People consider these beliefs and make decisions based on perceived threats and benefits, but this also affects their goals:

As we have discovered, one of the most important things affecting how much MSP people consume seems to be linked to their motivation for eating it, or what goals they hope to reach. Their goals and desires are linked to what they hope this change of diet will result in, or in other cases, what they hope a meat-free choice now and then will help them with. A vegan can be motivated by not wanting to eat animals and wanting to hurt the meat industry, while someone like Veggie-Frida can be motivated by not enjoying meat, and Health-Elise can be motivated to avoid dairy to clear up her skin.

Even if people plan to, or have a motivation for, eating meat-less, this does not necessarily mean that it will result in meat-free choices. Two very common barriers regarding food in general, is price and availability. We would like to add another for meat-free options, which is the ability and skill to think of and cook these options. For many it is difficult to think of what to eat when you remove meat from your diet. Vegan-Dina discussed this problem with us in the pre-study where she talked about how in the beginning she would just remove meat from her dinners and leave everything else. This resulted in non-fulfilling meals and made eating meat-free seem very difficult and not like a good option. Depending on what barriers people have, different things can solve them and facilitate the move from intention to behavior. We have called this step “Facilitation”, and more processed MSP seems to be a main factor here in overcoming the previously mentioned barriers.

For people with low barriers, like with Frida who personally does not enjoy meat or with Harald who has eaten vegetarian dinners for years, MSP is not necessarily needed to push them into action. For others, MSP can be a big help. If you believe that it is positive to eat meat-free, that society will reward you for eating meat-free, or you have the time and the budget to do so, it does not mean that you actually will choose a meat-free option. Especially if the options you have are either difficult to find, hard to make use of, or unappealing to you. The availability of more processed MSP like minced “meat” and vegan hamburgers lowers the perceived barriers of purchase by looking like recognizable products, like hamburgers or meatballs.

Also, this type of processed meat substitutes can replace regular meat products without consumers needing special cooking or nutrition skills. Now that these types of products are available in most large supermarkets, and are often placed next to the meat options they were created to replace, choosing them is just as easy as choosing the meat options, which removes a lot of the traditional barriers like specialty stores or high cooking skills.

The next step in the process is the actual choice of some form of MSP. If the results of this choice are positive; if someone's skin clears up, if people around them praises them for their choice, or if they read an article saying that eating less meat is the best thing someone can do for the environment, then this will reinforce the beliefs and motivation and increase the chance of the circle continuing.

This model can be expanded to include different scenarios, like eating in or at a restaurant. It can also include company, whether you eat alone or with others. These are factors which we know influence whether a MSP is chosen or not for dinner. However, due to time limitations, we chose to focus on the factors which affects the process of purchasing MSP directly.

6. Conclusion and recommendations

As the MSP market for dinner keeps growing, we have found that the selection in Norway keeps getting better with new products launching and more stores offering them. Regular stores and supermarkets keeps offering more and more products as the demand from non-vegetarians continue to grow. While we have been working on this paper, we have continuously found more and new products in stores, as well as seen news articles that talk about the positive effects of these diets.

While there are around 200.000 vegetarians in Norway, there are around 1,3 million Norwegians stating that they plan on eating less meat. As our findings show, vegans and vegetarians consider more foods to be a MSP, like chickpeas, lentils, tofu etc., that most of the meat-eating people we spoke to did not consider a proper substitute for meat. Therefore, branding a product as "vegan" or "vegetarian" might leave negative connotations towards the product, as opposed to "meatish" or "meatless" which indicates a resemblance to meat. Previous research found that meat eaters

wish for MSP to be as similar to meat as possible, both in flavor, texture, price and quality.

We would also like to repeat the ranking of reasons for Norwegians to cut back on meat from most important to least important: health, environmental, animal rights, and lastly, economic reasons. Here we can see that the first and most important motivation for Norwegians is health, which is an intrinsic motivation. This means that the average Norwegian cares more about the benefits of themselves, rather than the external, like the environment, although that is listed as reason number two. This means that focusing on the health benefits of MSP in advertising and profiling might be more effective than focusing on environmental benefits like Hoff has done with their “Liv Laga”-products. This is something that should be researched further, preferably with a quantitative study.

The model we presented earlier is also something we believe that can be further expanded and strengthened through the use of more data. Discovering the different weights of the factors for different target groups could be very useful in marketing and development of MSP.

6.1 Managerial implications

When it comes to managerial implications, the most important thing we have discovered is the difference in importance different people place on different aspects of MSP, as well as the power of accessibility and the differences in motivation.

Our respondents who does not eat meat at all, consume less processed-MSP as they also consider chickpeas, fish, lentils etc. to be MSP. This means that MSP like burgers, hot dogs, minced meat, might be more useful for meat-eaters, rather than non-meat eaters, and one might therefore consider focusing the marketing of these products on this larger segment. Meat eaters does not seem to consider meat as a threat in itself, which is why to target this segment, marketers should focus on the health benefits of their products, instead of positioning itself as “vegan” or “vegetarian”.

Even though the market has been much improved these past years, we still see room for improvements, including what we consider to be a gap in the MSP market. We chose to mainly focus on dinner, as that was the meal that our pre-study showed was the most linked with meat, as well as the meal we had the most literature on. However, it seems as though the other meals like breakfast and lunch has been kind of forgotten by the producers of MSP. Norwegians typically eat ham, cheese or different kinds of spreading on bread for breakfast, but there are not a lot of vegan substitutes on this market. Some stores do sell vegan cream cheese, but this is very rare to find. This leaves strawberry jam and vegan cheese as the few options we have today. This gap should be exploited, as it already has been in our neighbor countries, like Sweden. In Sweden you can easily find things like vegan “leverpostei” (liver spread), and different kinds of vegan cream cheeses in all regular supermarkets.

Also, most of the options are expensive, especially compared to how cheap meat has become. The most common types MSP are also processed foods, many based on soy. Our meat-eaters also discuss how there is no substitutes for a steak on the market yet, which makes it difficult to cut back completely. However, the meat-eaters say that there are some good options for reducing meat-intake, like the Meatish minced meat, and the Linda McCartney burgers. This means that all over, the market does provide sufficiently similar options, especially for those wanting to replace a few meat dinners a week with a vegetarian one.

The ease and availability of options also both normalizes the use of MSP and makes it easier to choose it in the store, both things that strengthens the likelihood of purchase. We believe that by working with the larger grocery stores brands should work on creating new meat-free products to be sold near the meat-products they resemble to allow people to choose the meat-free alternative after they have decided what they want to eat for breakfast, lunch or dinner, instead of having to decide in advance and go looking for the meat-free options.

6.2 Limitations

Due to our time frame and lack of financial resources, this study has been conducted with the best intentions of investigating the consumer's different motives, intentions and interest around MSP. Our focus has been to explore the MSP market, and not to gain results that can be generalized for an entire population.

For practical reasons, we have also focused specifically on the Oslo area due to that being our main base. This means that our results should be viewed in this context and be used to better understand the market, and not as a summary of it.

We have also, as mentioned previously during the result section, focused only on non-meat eaters and sometimes-meat eaters during this paper, as we found these groups most interesting for the near-future of the market. In further studies, and also in studies with a longer time horizon, focusing on meat-eaters would also give another important point of view to the debate by focusing on those that do not have an intention to change their way of eating, and those that can not make their intention into action.

6.3 Validity and Reliability

Reliability is often discussed in relation to leading questions, and whether the results can be replicated by another scientist (Kvale & Brinkmann, 2015; 276). We have tried our best to produce reliable results, by letting our participants speak freely and avoiding leading the interview. Since one of us is a flexitarian, we had some previous knowledge about the topic of interest. This allowed us to ask relevant questions, contributing to a shared common interest with our vegetarian/vegan participants and informing our meat-eating participants when necessary.

Validity is a question of whether our method is suitable for examining what we want to examine. There are multiple factors which can affect our interview process. In our case, the interviewees have volunteered to participate, without any incentives. They were also left in charge to choose a location for the interview and cooking session. In most cases the participants chose his or her own local store, as well as their own kitchen. This allowed them to feel comfortable in a familiar setting

and eliminate any disturbing factors. The only thing we encouraged was making something for dinner that they had made before, to try to avoid some attempt at impressing us, or improving on their normal diet.

We believe that for all our interviews, the three different data gathering steps we had; the shopping round, the food diary and the cooking and interview session, fit into the same theme strengthening our belief that we were getting correct information.

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8. Appendix

Appendix 1: Interview Guide - Main Study

<u>Intervjuguide: Hovedstudie</u>
<p>Dette intervjuet omhandler konsumering av og tanker rundt kjøtterstatningsprodukter i norske matbutikker (såkalt Meat Substitute Products). Hvilke tanker har du om dette temaet? (Vi starter med hovedspørsmålet og følger så opp med «hvorfør» og lignende hvis vi får korte svar tilbake. Underspørsmålene til høyre er ment for å hjelpe i øyeblikk hvor samtalen stopper, eller hvor intervjuobjektet blir usikker, og er ikke ment for å avbryte mens de svarer på hovedspørsmålet, eller for å spørre om ting de alt har svart på)</p>
<p><u>Kjøtterstatningsprodukter</u></p> <p>Hva ser du på som kjøtterstatningsprodukter?</p> <ul style="list-style-type: none"> • Hvordan forstår du ordet kjøtterstatningsprodukter? Hvis du kan være så konkret som mulig? • Vil du kalle kikerter et kjøtterstatningsprodukt? Hvorfor/Hvorfor ikke? • Hva med falafel? Hvorfor/Hvorfor ikke? • Falafelburger? • Soyapølser? • Er det noen forskjeller mellom produktene du vil inkludere og ikke?
<p><u>Situasjoner for bruk av kjøtterstatningsprodukter</u></p> <p>Tenk at du skal kjøpe inn mat til middag, er det noen situasjoner hvor du ville vurdert å kjøpe kjøtterstatning? Fortell hvorfor ja eller nei?</p> <ul style="list-style-type: none"> • Hva ville du kjøpt du? • Hva ville du ikke kjøpt? • Hvis nei til MSP til middag, er det noen annen situasjon der det ville vært mer sannsynlig? Hvorfor? • I hvilke situasjoner velger du kjøtterstatningsprodukter, og hvorfor?
<p><u>Motivasjon for konsum av kjøtterstatningsprodukter</u></p> <p>Hvorfor kjøper du kjøtterstatningsprodukter? (motivasjon)</p> <ul style="list-style-type: none"> • Evt: Hvorfor kjøper du ikke kjøtterstatningsprodukter? <p>(Er det spesielle grunner til at du kjøper/ikke kjøper kjøtterstatningsprodukter?)</p> <ul style="list-style-type: none"> • Er det noe du føler dagens tilbud av kjøtterstatningsprodukt mangler?
<p><u>Hvis du handler kjøtterstatningsprodukter, hvilken butikk velger du da og hvorfor?</u></p>
<p>Nærbutikker, spesialbutikker etc? Har det noe med utvalg å gjøre? Beliggenhet? Kan du nevne noen merker som fører kjøtterstatningsprodukter, også butikkenes egne merker?</p>

<p><u>Fremtidens matvaner</u></p> <p>Hvordan tror du nordmenns matvaner vil endre seg i fremtiden?</p> <ul style="list-style-type: none"> • Ser du en endring i mattrender? • Hvordan oppfatter du tilbudet av matvarer i butikken, har det evt. endret seg de siste årene?
<p><u>Personlig forhold til vegetarmat</u></p> <p>Hvordan vil du forklare ditt forhold til vegetarmat og kjøtterstatningsprodukter?</p> <ul style="list-style-type: none"> • Hvordan vil du beskrive deg selv når det kommer til mat? (vegetarianer, pescetarianer...) • Hva tror du er viktig for andre når det kommer til matvalg? • Hender det du spiser kjøttfritt? (Hvis ikke nevner MSP; Hva med MSP?) • Hvorfor ja/nei, og i hvilken sammenheng • Hvilke kjøttfrie produkter tiltrekker deg i butikken, og hvorfor?
<p><u>Kjøtterstatningsprodukt fra A-Å</u></p> <p>Hvordan ser du for deg det ideelle kjøtterstatningsproduktet?</p> <ul style="list-style-type: none"> • Emballasje • Pris • Konsistens, smak, lukt, utseende • Informasjon på emballasje • Næringsinnhold
<p><u>Mat-journal</u></p> <p>Er dette en representativ uke for deg når det kommer til matkonsum? Hvorfor/Hvorfor ikke?</p> <ul style="list-style-type: none"> • Pleier det være mer eller mindre kjøtt/MSP/hjemmelaget/ferdigmat? • Sosiale settinger (selskap etc.) • Lager du mat selv/får du servert? Endrer det hvordan du spiser? • Hva tenker du når du ser hvordan du har spist? Noe du skulle endret? <p>Kan du raskt snakke deg gjennom uka og de forskjellige måltidene du har beskrevet?</p> <p>(Velg en dag/et måltid fra journalen) Kan du snakke litt mer om (...)? Begrunnelse/Motivasjon/Følelser?</p>