

Report in Brief

This exclusive report from Cultivate Research summarizes the available quantitative research on the number of vegetarian and vegan consumers in the United States.



The Bottom Line

A small proportion of U.S. adults (1-3% of the population, or 2-6 million adults) are “actual” vegetarians or vegans, although about twice that number (4-6%) considers themselves vegetarian when asked by researchers. The number of vegetarian and vegan youths seems roughly comparable to adults (2-3%, or 1-1.5 million children), but research on vegetarian children age 18 and under is currently very limited. However, while vegetarians and vegans are a small percent of the population, they are frequent purchasers of vegetarian foods and are also “thought leaders” when it comes to food purchases in general.

About Cultivate Research

Cultivate Research is the leading consumer and market research company serving the needs of the vegetarian foods industry and related businesses. We provide high-quality research consulting services, presentations, and written reports to support the strategy and marketing needs of vegetarian food manufacturers, distributors, retailers, and marketers.

To learn more about Cultivate Research, visit us online at www.CultivateResearch.com.

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Introduction and Overview

The proportion of the U.S. consumer population that is either vegetarian or vegan represents a primary target audience for vegetarian food businesses. These consumers have been the subject of many research studies conducted by various companies and organizations in recent years. By examining the results, businesses can better understand the market for vegetarian foods.

To understand the *actual* vegetarian population, one must isolate specific types of animal-based foods and ask carefully worded questions to ensure that respondents fully understand the definition of vegetarianism. However, the more common approach to measuring vegetarianism is to simply ask respondents if they are vegetarian or not. Both responses are useful to know, but the number of actual vegetarians is the better measure; each approach is described in more detail in later sections.

In a nutshell, based on the surveys summarized in this report, 1-3% of adults and 2-3% of youths are actual vegetarians and vegans (the vast majority are vegetarian, not vegan). There are about 225 million adults (age 18 and over) and 45 million youths (age 6-17) in the U.S., according to Census Bureau estimates for 2006. The number of self-reported vegetarians and vegans is roughly double the number of actual vegetarians and vegans (no self-reported data are available for youths). The following table shows Cultivate Research's estimates for the current size of both populations.

	U.S. Adults (age 18+)		U.S. Youths (age 8-17)	
	(%)	(#)	(%)	(#)
Actual Vegans & Vegetarians	1 – 3%	2 – 6 million	2 – 3%	1 – 1.5 million
Self-Reported Vegetarians	4 – 6%	8 – 13 million	N/a	N/a

Actual Vegetarians and Vegans

In recent years, the Vegetarian Resource Group (VRG) and Cultivate Research have completed studies using comprehensive definitions of “meat” in an attempt to accurately measure vegetarianism in the U.S. VRG conducts surveys of adults every three years (most recently in 2006), as well as surveys of youths age 8-17 that are conducted every five years. In its surveys, VRG asks respondents, “Which of the following foods do you NEVER eat?” The Cultivate Research study in 2005 took a slightly different approach, instead asking respondents to report how often they eat “any type of meat, including chicken, turkey, fish/shellfish, beef, pork, veal, or lamb.”

Measuring the number of actual vegetarians and vegans in the U.S. is difficult because they are a small segment of the population. Surveying them typically results in less precise data and minor changes in the percent of actual vegetarians and vegans over time may not necessarily represent meaningful trends. Despite these concerns, however, it is informative to look at how many people report eating a truly vegetarian/vegan diet, using an inclusive and appropriate definition of the term “meat.” See the following table for a summary of the VRG and Cultivate Research studies, as well as studies from other sources that used a relatively comprehensive approach to defining vegetarianism.

RESEARCH ON ACTUAL VEGETARIANS AND VEGANS

Year	Source	% of Adults	# of Adults	% of Youths	# of Youths
2008	Vegetarian Times	3%	7.3 million	N/a	N/a
2007	Centers for Disease Control	N/a	N/a	0.5%	367 thousand
2006	Vegetarian Resource Group	2%	5.2 million	N/a	N/a
2005	Harris Interactive	N/a	N/a	3%	
2005	Cultivate Research	1%	2.2 million	N/a	N/a
2005	Vegetarian Resource Group	N/a	N/a	3%	1.3 million
2003	Vegetarian Resource Group	3%	6.5 million	N/a	N/a
2000	Vegetarian Resource Group	3%	6.3 million	N/a	N/a
2000	Vegetarian Resource Group	N/a	N/a	2%	900 thousand
1997	Vegetarian Resource Group	1%	2.0 million	N/a	N/a
1995	HealthFocus, Inc.	3%	5.8 million	N/a	N/a
1995	Vegetarian Resource Group	N/a	N/a	< 2%	800 thousand

Based on the data shown in the previous table, we estimate that actual vegetarians and vegans represent between 1% and 3% of the adult population in the U.S., or between 2 and 6.5 million persons. The most recent studies from VRG and Cultivate Research provide estimates ranging from 1.3% to 2.8% of adults. Regarding youths, the data are limited, but the most recent study conducted by the Centers for Disease Control estimates that at least 0.5% of the youth population is vegetarian.

Although this statistic has been used to estimate the vegetarian youth population, the actual number is probably somewhat higher because the CDC research studied individuals with respect to diet as a form of alternative or complementary therapy and likely excludes youths who eat vegetarian for other reasons such as animal welfare or environmental reasons. The VRG studies suggest that the CDC results are understated. Most recently, VRG found that 2-3% of youths age 8-17 are actual vegetarians and vegans. This translates to between 900 thousand and 1.3 million vegetarian/vegan youths, significantly higher than the CDC estimates. In summary, the data show consistently modest numbers of actual vegetarians and vegans, but there is no discernible trend over time.

Self-Described Vegetarians

The mainstream media and other sources often refer to populations of 10 million or more adult vegetarians in the U.S. While not inaccurate, per se, these estimates are misleading because they are based on “self-described” vegetarians who may or may not be using a correct and inclusive definition of the term “vegetarian.” By simply asking the question, “Do you consider yourself a vegetarian,” the results invariably include people who identify vegetarianism with simply avoiding red meat, eating only chicken and/or fish products, etc. While actual vegetarians and vegans appear to represent between 1% and 3% of the population, self-described vegetarians and vegans (a segment that includes actual vegetarians and vegans) represent a significantly larger 4-6%. This translates to roughly 9-13 million self-described vegetarians and vegans; see the following table for a summary.

RESEARCH ON SELF-DESCRIBED VEGETARIANS AND VEGANS

Year	Source	% of Adults	# of Adults
2005	CBS Corp.	2%	4.5 million
2002	Time / CNN	6%	12.9 million
1999	Gallup	6%	12.1 million
1995	Time / CNN	5%	9.7 million
1992	Time/ CNN	7%	13.2 million
1978	Roper	1%	1.6 million
1943	Gallup	3%	2.9 million

Note: There are no known studies of self-described vegetarianism among youths. However, see the “more information” section for data points regarding youths.

The largest and most recent study was conducted by Time/CNN in 2002 and found that 6% of U.S. adults (12.9 million people) consider themselves vegetarian. Given the sample size of more than 10,000 people, this study represents the most accurate assessment of self-reported vegetarianism ever conducted in the U.S. Interestingly, the Time/CNN results fall at the upper end of the range of estimates of self-reported vegetarianism from previous studies spanning several decades. This might suggest that self-described vegetarians and vegans have increased in number over time. However, it is impossible to make any concrete conclusions about trends based on currently available data.

It is clear that any study using self-reported vegetarianism as its primary measure will overstate the number of true vegetarians and vegans in the population due to a misunderstanding of the terms (e.g., someone who rarely eats chicken and/or fish may identify as vegetarian). However, those who describe themselves as vegetarian but continue to eat some types of animal flesh (roughly 5-7 million adults) are an audience that might be of special interest to vegetarian food companies. These “untrue” vegetarians may only represent a small segment of the population, but they are also predisposed to associating themselves with vegetarianism.

More Information

ADDITIONAL DATA POINTS - ADULTS

Year	Source	% of Adults
2006	Vegetarian Resource Group	9% of women are vegetarian, nearly twice as many as among men (5%).
2006	Vegetarian Resource Group	9% of adults age 45-54 are vegetarian, vs. 5% of 18-24 year olds.
2006	Vegetarian Resource Group	8% of college graduates are vegetarian, vs. 4% of those who have not completed high school.
2005	Cultivate Research	13% of U.S. adults are “semi-vegetarians” who eat meat with less than half of meals.
2005	Cultivate Research	3 times as many people have reduced their meat consumption over the past year than increased it.
2005	Cultivate Research	Vegetarians and semi-vegetarians are predominantly female (these groups are 63% and 70% women, respectively).

ADDITIONAL DATA POINTS - YOUTHS

Year	Source	% of Youths
2005	Vegetarian Resource Group	11% of girls age 13-17 are actual vegetarians using VRG's comprehensive survey wording.
2003	Teenage Research Unlimited	20% of all 12-19 year olds consider vegetarianism to be "in." Specifically, 48% of 16-17 year old girls, 50% of 18-19 year old girls, and 22% of 18-19 year old boys said that they think vegetarianism is "in."
2003	Mintel Research	Adults age 18-24 are three times more likely than the general population to follow a vegetarian diet.
2004	Aramark	24 percent of students indicated that the availability of vegan dishes on campus is important to them.
1995	National Restaurant Association	15% of the nation's 15 million college students eat vegetarian during a typical day.
1995	RoperCollectTrack	Almost half of women college students say vegetarianism is in, versus one half of men students, according to RoperCollegeTrack.

Implications for Vegetarian Food Businesses

By reviewing these research findings, vegetarian food businesses should have a better assessment of the size of the core vegetarian and vegan consumer base. Understanding the magnitude of the total consumer base is helpful to businesses that are assessing the true market potential for their products, as well as segmenting the consumer base in order to plan and implement the most effective sales and marketing strategies for particular products or brands. It is important to note that although vegetarians and vegans are a small segment of consumers, they are frequent consumers of meat and dairy alternatives and they also have significant influence over other consumers.

The research data provided in this report represent only one component of the complete picture needed to make smart business decisions. Vegetarian food companies also need to look at other potential consumer bases. For example, meat reducers are those people who are turning more frequently to meat alternatives, but are not vegetarians or vegans and semi-vegetarians eat vegetarian most of the time. These groups are also part of the core consumer base for vegetarian food. Once all potential consumer bases are identified, vegetarian food businesses must then examine the market drivers and individual influences that encourage each segment to purchase relevant vegetarian food products to formulate the strategies that best encourage such behavior and maximize potential sales.

About Cultivate Research

To assist you in your quest for more sales and greater profitability, Cultivate Research offers a variety of services that will help you understand your market and identify exciting growth opportunities. Original studies conducted by Cultivate Research offer you insight into the relevant consumer segments for vegetarian food businesses, including Active Meat Reducers, Semi-Vegetarians, and Vegetarians and Vegans. These consumers are described in detail in Cultivate Research's *Vegetarian Consumer Trends* report series. Visit our website (www.CultivateResearch.com) to download the free series overview or to learn more about Cultivate Research's custom services.