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

The United Kingdom

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Top 10 key takeaways

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48% of meat consumers in the UK say that they have reduced their annual meat intake.

25% of UK respondents view themselves as flexitarian, 7% as vegetarian, 4% as pescatarian, and 2% as vegan.

The main motives for reducing meat and dairy consumption are **health** (48%), **the environment** (29%), and **animal welfare** (25%).

Respondents in the UK intend to substitute animal-based foods with legumes (57%), legume-based foods (43%), plant-based meat alternatives (39%), and plant-based dairy alternatives (41%).

Price (43%) **and taste** (37%) remain the key barriers to choosing plant-based alternatives.

74% of consumers in the UK intend to purchase plant-based alternatives from **supermarkets**, while 31% plan on buying them from **discounters**.

The most requested plant-based alternatives are **plant-based meat** (35%), **plant-based poultry** (28%), and **plant-based sweets and snacks** (27%).

49% of UK respondents say that they **trust plant-based alternatives more than they did three years ago**.

UK respondents trust plant-based alternatives mostly due to their **safety** (61%), **accurate labeling** (61%), and **reliability** (58%).

72% of respondents are in favour of the **removal of taxes on foods that support a healthier lifestyle**, while 70% think that there should be **improved standards for transparency** in product certification.

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Introduction

Comprising of four significant economies with major agricultural producers and distributors, the United Kingdom is a key player in the alternative-proteins industry, whose potential has not gone unnoticed by the UK government. **Signaling substantial interest and involvement,** over the last twelve years, the UK government has budgeted **nearly half a billion pounds to advancing food systems[a]**.

According to GFI Europe's report on alternative proteins in the UK[a], UK Research and Innovation (UKRI), an organisation sponsored by the Department for Science, Innovation and Technology, has invested over £43 million into alternative-protein R&D[b] since 2012, with 65% of this investment occurring between January 2022 and May 2023. Additionally, the UK government recently launched the 'Better Food for All' competition, allocating £20 million to agriculture- and food-systems-related innovations, including a specific focus on plant-based and alternative proteins, along with their incorporation into food products".

Concurrently, the diversity and quantity of alternative-proteins startups and research conducted by universities and companies in the private sector are continuing to grow, contributing to the UK's increasing competitiveness in the space. In 2021, British data company Beauhurst reported that **863 Food-tech companies had been established since 2011, attracting £2.6 billion in equity investments and £97.6 million in grants**. Independent think tank Green Alliance additionally placed the annual value of the UK's plant-based industry at £6.8 billion, with projections for the creation of **25,000 new jobs** by 2035.[c]

With this report's findings confirming the increased awareness and popularity of plant-based dietary lifestyles, there still remains significant opportunities for consumer engagement and product development, tailoring to consumers' persistent taste and affordability concerns. Set against the ongoing growth of plant-based food culture in the UK, this report explores current consumer trends and **creative strategies to engage new customers and retain existing ones.**

a) Good Food Institute Europe (2023). *Sustainable proteins in the United Kingdom. An ecosystem review.*
b) Plant-based, fermentation and cultivated meat, seafood, eggs and dairy.
c) Green Alliance (2023). *Appetite for change. Why the UK should lead the emerging alternative proteins market.*

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Survey methodology

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Survey

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

Participants

- 750, all over the age of 18.
- 20% of participants in each age group:
  - 18-24 years old
  - 25-34 years old
  - 35-44 years old
  - 45-54 years old
  - 55-70 years old
- 49,87% men, 50% women and 0,3% other.
- Only consumers who are responsible for household grocery shopping participated.

4 key changes compared to 2021

The United Kingdom

Compared to the results of the 2021 report,[1] four key developments in the UK are evident:

No 1. In 2021, 37% of consumers reported a decrease in their yearly meat intake.[2] In 2023, this figure increased to 48%.

No 2. In 2021, 35% of respondents said that they followed a flexitarian, pescatarian, vegetarian, or vegan diet.[3] In 2023, this increased to 38%, with flexitarians showing the biggest increase.

No 3. While concerns around the affordability of plant-based alternatives[5] remained the biggest issue in both 2021 and 2023, taste replaced lack of information as the second-most prominent barrier to following a plant-centric diet.

No 4. 49% of UK respondents said that they trust plant-based alternatives more than they did three years ago.

1) 'What consumers want: A survey on European consumer attitudes towards plant-based foods.
2) Meat (e.g. beef, pork, chicken).
3) Flexitarian, vegetarian, pescatarian or vegan.
4) Flexitarian – I sometimes eat meat, but I am trying to reduce my meat consumption and often choose plant-based foods instead.
5) products made solely from plant-based ingredients and are developed to resemble conventional animal-based foods such as meat or dairy. (Examples include soya burgers and soya milk).

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Consumer attitudes & behaviours towards plant-based foods

The United Kingdom

Meat consumption: behaviours and attitudes

Meat consumers in the UK have shown notable shifts in their meat- and dairy-consumption habits since 2021,[5] with **48% of respondents saying that they reduced their meat intake in the previous year**. Of these respondents, 13% significantly decreased their meat consumption by 50% or more, while 35% made fewer reductions. Conversely, 41% report no change in their meat consumption, while 11% say that they have increased their meat intake. Beef and pork showed the most substantial reductions, accounting for 48% and 17%, respectively, Changes in the consumption of other animal-based products such as yoghurt, cheese, and eggs, remain marginal, with less than 4% of meat or dairy consumers reporting notable changes.

The most important motivation for eating less meat and dairy is health,[6] with 48% of respondents citing it as a key reason, followed by environmental concerns, at 29%, and animal welfare, at 25%.

While the percentage of UK consumers who reduced their levels of meat consumption was slightly below that of the average reduction across the countries surveyed (48% vs 52%), UK respondents are among the most likely to decrease their meat consumption for reasons related to health (+1%) and least likely to decrease their consumption due to concerns over antibiotics (-7%).

Dietary lifestyles in the UK

Potentially reflecting the significant presence of alternative proteins in the UK, respondents exhibited a slight shift toward more plant-centric dietary lifestyles. Despite a 1% decrease in the number of self-identified vegans, in 2023, more people were following **flexitarian, pescatarian, or vegetarian lifestyles**, while there was a **decrease in the number of people following omnivore diets**.

When asked how long they had been following their diets[7], **a significant portion of UK respondents said that they have been following a flexitarian, pescatarian, vegetarian, or vegan diet for two years or more**. 36% have been flexitarian for more than two years, while 47% of pescatarians, 58% of vegetarians, and 38% of vegans have similarly been following their diets for two years or more.

	2021	2023	% change
Omnivore	65	62	-3
Flexitarian	23	25	+2
Pescatarian	3	4	+1
Vegetarian	6	7	+1
Vegan	3	2	-1

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

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

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Consumer attitudes & behaviours towards plant-based foods

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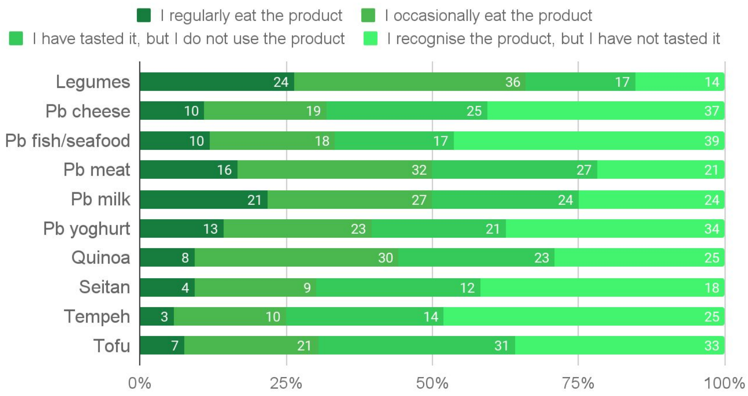
Familiarity of plant-based foods*



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

Legumes rank as the most-familiar plant-based food in the UK, with 60% of respondents reporting at least occasional consumption, followed by plant-based milk (48%), meat (47%), and quinoa (38%).

When asked about their likely future behaviours, **38% of UK respondents said that they were open to substituting animal-based foods with plant-based meat alternatives,** followed by 37% opting for legumes or plant-based dairy alternatives.

Market opportunities for plant-based alternatives

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

1. Taste (66%)
2. Affordability (53%)
3. Health (47%)
4. Freshness (29%)
5. Texture (28%)

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

1. Too expensive (43%)
2. Not tasty enough (37%)
3. Don't want to change routine (24%)
4. Worried about health (24%)
5. Lack of support from friends/family (23%)

Compared to the 2021 results, taste and health remain key motivating factors when buying plant-based alternatives, while **affordability has increased in significance**. While the levels of concern declined across all other barriers to following a plant-based diet, taste rose in ranking of concerns.

When it comes to purchase location,[10] 74% of consumers are most likely to buy plant-based alternatives at supermarkets, the highest percentage among all countries surveyed, followed by discounters (32%). In terms of consumption location,[10] **71% of people are most likely to consume such products at home**, 26% at conventional restaurants, 17% through takeaway or online orders, and 16% at an exclusively plant-based restaurant.

In terms of the variety of plant-based products available,[11] **35% want to see more meat products (e.g. burgers and sausages)**, followed by sweets and snacks (27%).

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

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Consumer attitudes & behaviours towards plant-based foods

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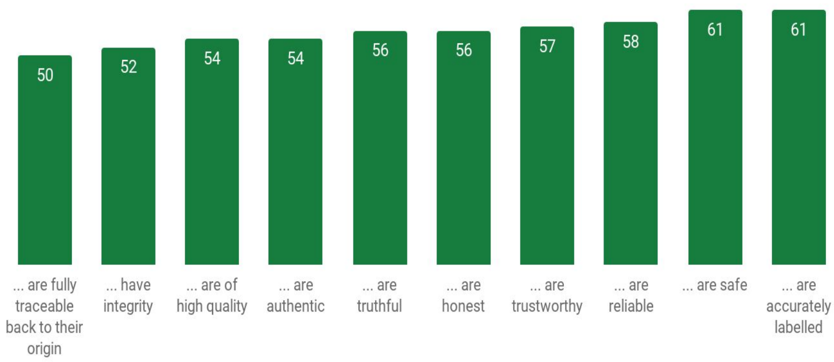
Trust levels towards alternative proteins

UK consumers trust plant-based protein sources such as cereals and pulses the most, followed by fungi (e.g. mushrooms, mycelium, and yeast) and cultivated protein (e.g. cultivated meat and dairy). The protein sources that they trust the least are insect-based protein, followed by algae-based protein.[12] While the trust ranking of the different protein sources remained largely unchanged, **49% of respondents said that they trust plant-based alternatives more than they did three year ago**,[13] while 36% express the same level of trust. About 11% said that they trust plant-based alternatives less now, and 4% were uncertain.



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

Plant-based proteins are trusted mostly for their safety and accurate labelling (61%), reliability (58%), and trustworthiness (57%). While no characteristic fell below the 50% threshold, traceability, integrity, and quality remain comparatively key points for skepticism.

The media and online influencers

Overall, UK respondents trust general search engines the most, followed by organisation-based websites (e.g. health and nutrition societies, food companies, and governments). In 2023, **25% of UK respondents reported using social media to search for information about food products and to read opinions about food products from people with similar interests**. 24% said that they use social media to receive updates on discounts and promotions on food products.[14]

Ranking of online media, by trustworthiness[15]

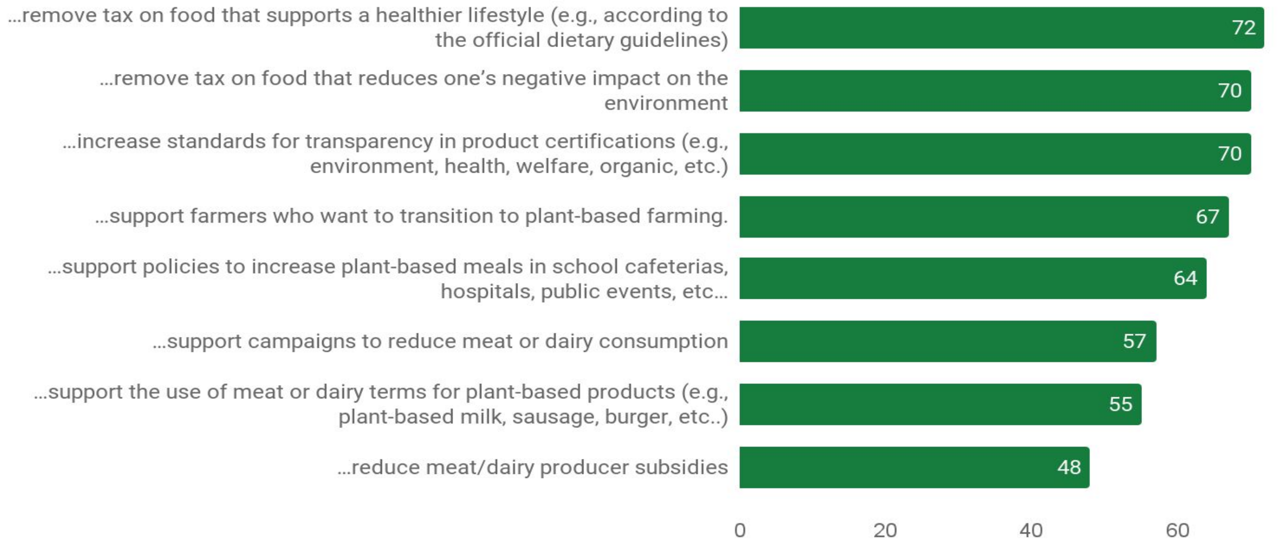
1. Search engines (e.g. Google)
2. Health and/or nutrition society websites
3. Food-company websites
4. Government websites
5. News websites
6. NGO websites
7. Online videos (e.g. YouTube)
8. Online collaborative websites (e.g. Wikipedia)
9. Online blogs
10. Social networking sites (e.g. Facebook, Instagram,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

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

Consumer attitudes & behaviours towards plant-based foods

The United Kingdom

Opinion on policy



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

Of all countries surveyed, the UK has the largest proportion of respondents that support the removal of tax on foods that promote a healthier lifestyle (72%). Respondents also agreed with the removal of tax on foods that have a less negative impact on the environment (70%). This is paired with equal agreement to increase transparency standards in product certifications (also 70%). Support for farmers transitioning toward plant-based farming garnered agreement from 67% of respondents, while 64% supported increasing plant-based meals in social, educational, and work settings. These results remain consistent with **UK consumers' prioritisations of health and affordability** while also highlighting areas that require further engagement and strategic focus.

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

"The UK's plant-based market is well established, but this report shows just how much potential there is. The growth in flexitarians and meat reducers is significant and consistent, and we expect even faster growth as the industry makes more gains on taste and affordability - two factors so crucial for consumers. We're seeing the public sector, in particular, take huge strides forward. Schools, universities, and local authorities are accelerating their shifts towards healthier and more planet-friendly food. Some of this is subtle through changes to menu language and layout to encourage better choices, and some is much more overt through public climate commitments."

Jimmy Pierson
Director, ProVeg UK

Conclusions & recommendations

The United Kingdom

Conclusions:

1. **Dietary shifts and motivations:** The consumer landscape in the UK reflects a consistent and growing shift away from meat and dairy consumption, driven largely by motivations around health (48%), environment (29%), and animal welfare (25%).
2. **Dietary lifestyles are evolving:** 2023 respondents exhibited an increase of 4% in self-identified flexitarians, pescatarians, and vegetarians, accompanied by a 3% decrease in respondents identifying as omnivores.
3. **Consumer preferences and challenges:** Taste and affordability remain key drivers and barriers for consumers purchasing plant-based alternatives. Over 70% of consumers additionally report relying on supermarkets for plant-based products.
4. **Consumer trust:** While UK consumers trust plant-based alternatives more than they did three years prior, traceability, integrity, and quality remain causes for hesitancy.
5. **Social influencers:** UK respondents rely most on social media for information about food products and express high levels of trust in organisational websites, such as those of health and nutrition societies, food companies, governmental bodies, etc. UK respondents additionally express one of the highest agreement (top 2 of countries surveyed) with the removal of tax on food supporting healthier lifestyles and foods reducing one's negative impact on the environment.

Recommendations:

1. **Promote health benefits:** Building upon plant-based market momentum, develop engaging and informative campaigns on the health advantages of plant-based diets, positioning them as enhancers for long-term healthy lifestyles.
2. **Implement a transparent labeling strategy:** Pursue third-party certifications from reputable organisations, addressing quality, traceability, and integrity concerns. Clearly convey results, criteria, and resources to access further information.
3. **Address affordability concerns:** Partner with local food producers, manufacturers, and low cost retailers to diversify places of purchase and increase accessibility and affordability of plant-based products.
4. **Cater to evolving consumer preferences:** As UK consumers continue to shift towards plant-based alternatives, there is a need to further advance flavour profiles of existing products and increase variety in several categories, particularly plant-based meats, poultry, and sweets and snacks.
5. **Leverage public policy to increase and maintain plant-based adoption:** Explore the potential for local, state, or national initiatives to reduce tax on products that promote healthier lifestyles and decrease negative environmental impacts.

THE FUTURE OF PLANT-BASED EATING IN EUROPE

Regional variations

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

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

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

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Imprint

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

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

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