

Thought Leadership

Plant-based meat substitutes



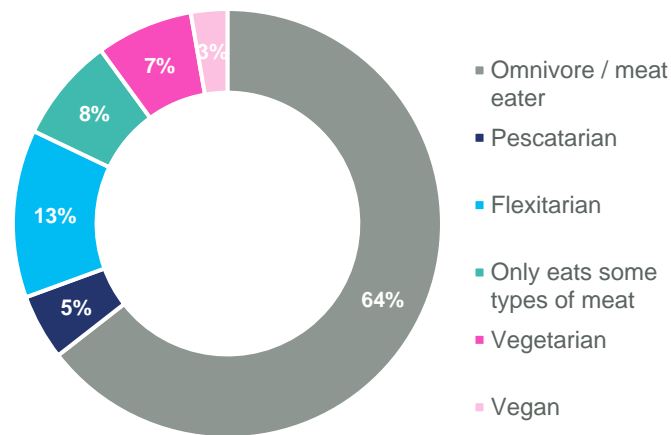
Key findings

24 January 2023

UK adults' meat-eating habits

Over 3 in 10 UK adults limit meat consumption

UK Adults' Meat Eating Habits



Although the majority (64%) of UK adults describe their dietary habits as omnivorous, a significant minority avoid some or all types of meat. Over one in ten (13%) are flexitarian, avoiding meat most of the time. An additional 8% only eat some types of meat. Furthermore, 15% avoid meat altogether: 7% say they're vegetarian, 5% are pescatarian, and 3% are vegan.

The percentage of adults avoiding meat most or all the time is highest for young adults, which suggests that these dietary habits might be gaining popularity. Four in ten (39%) 18-34-year-olds identified as flexitarian, pescatarian, vegetarian, or vegan. In comparison, a quarter (25%) of 35-54-year-olds identified in these same categories. Only one in five (22%) of those 55 and over avoid meat most or all the time.

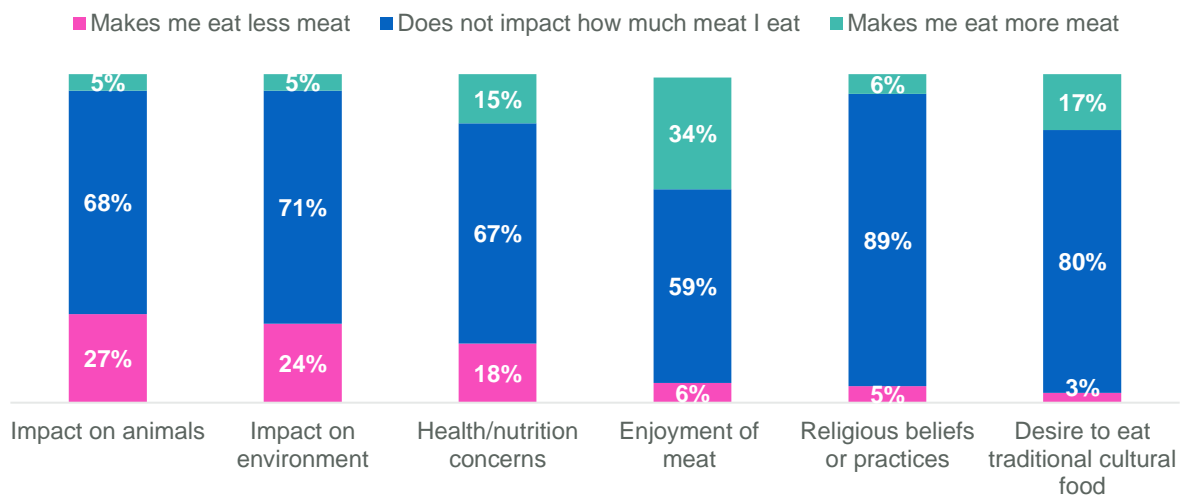
Most non-meat eaters (vegans, vegetarians, and pescatarians) did eat meat at some point in their life. Only 8% have avoided meat their whole lives. However, a third (33%) have avoided meat for over ten years. About one in five (21%) non-meat eaters stopped eating meat between five and ten years ago. The remaining 37% stopped eating meat less than five years ago.

Motivations for eating & avoiding meat

A quarter (24%) of meat eaters say that they eat less meat than they would otherwise because of meat's impact on the environment. A quarter (27%) also report that their meat consumption is lowered due to the impact on animals. Women are more likely than men to eat less meat out of concern for animals or the environment – about three in ten women (32% and 28% respectively) report doing so for both these reasons, compared to two in ten men (21% and 19% respectively).

On the other hand, 35% of UK adults report consuming more meat simply out of an enjoyment of it, and about a fifth (17%) of meat eaters say they eat more meat out of a desire to consume traditional cultural or family recipes. Interestingly, younger adults are more likely to eat meat because of these traditional reasons (29%). Additionally, a third (33%) of 18-34-year-old meat-eaters eat more meat because of health or nutrition concerns, whereas a fifth (22%) of meat eaters 55 and older eat less meat for the same reason.

Factors informing UK meat eaters' eating habits for meat

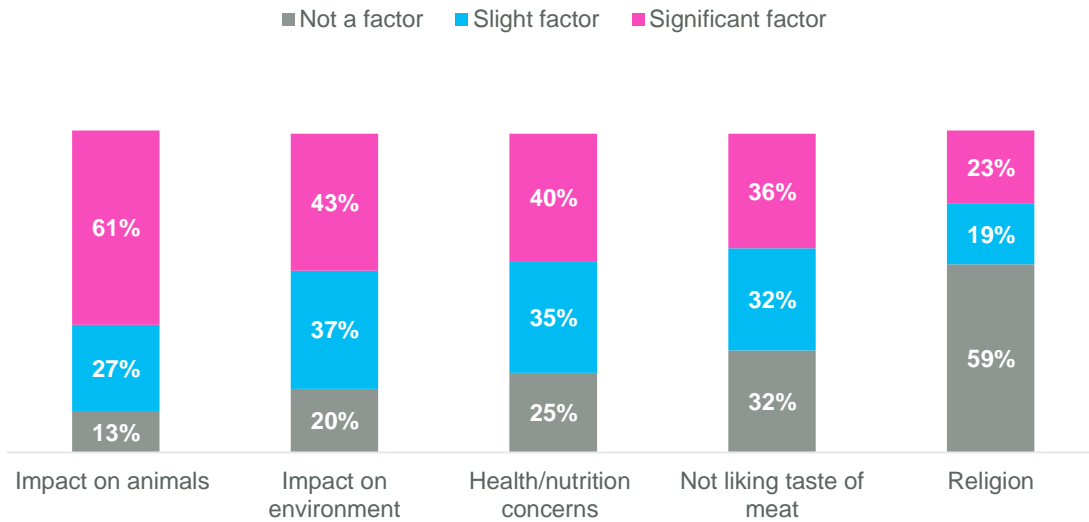


For those who don't eat meat, the impact on animals is the top reason for avoiding it. Almost nine in ten (87%) non-meat eaters avoid meat at least in part due to this. In addition, four-fifths (80%) of non-meat eaters cite environmental impact as a reason for avoiding meat.

Three quarters (75%) of non-meat eaters say that health and nutrition concerns contribute to them not eating meat. This reasoning is more common for young adults than older adults, which is especially interesting since amongst non-meat eaters, older adults are more likely to reduce their meat consumption for health reasons. About seven in ten (68%) non-meat eaters say that not liking the taste of meat is also a reason that they don't eat meat.

About a quarter of those who don't eat meat say that religion is a significant factor in this choice (23%), and another fifth (19%) say that it's a slight factor for them. Interestingly, this reason is more common amongst younger non-meat eaters. About a third of those 18-34 and 35-54 (32% and 28% respectively) say that religion is a significant factor in why they avoid meat, whereas only 6% of those 55 and older do. An additional third of 18-34 year olds (35%) say that religion is a slight factor in this decision, compared to fewer than one in ten of those aged 35 and up (9% for 35-54 and 7% for 55+).

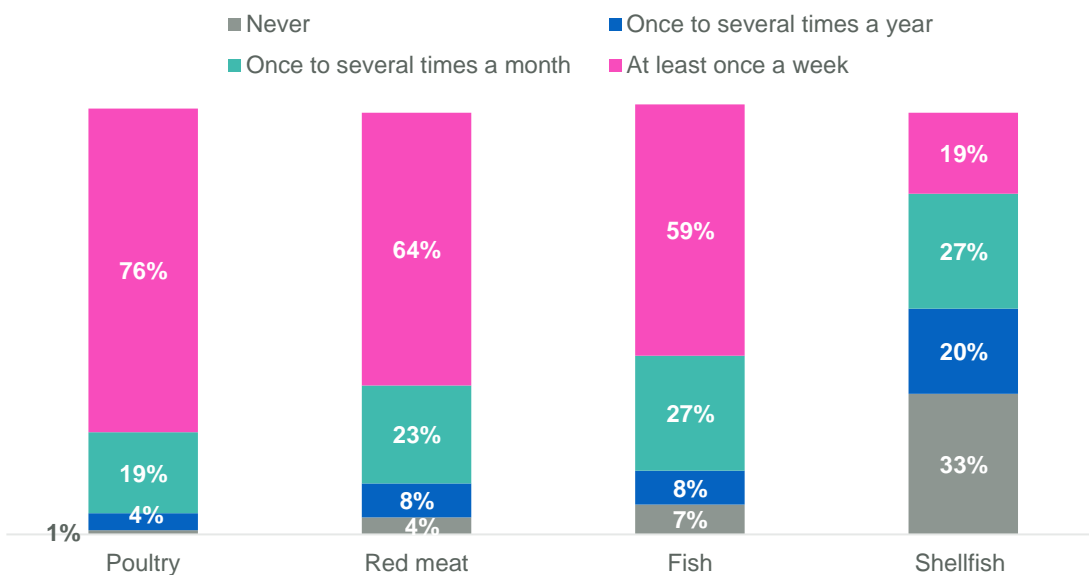
Factors influencing meat avoidance for UK non-meat eaters



Poultry most popular amongst UK meat eaters

Amongst UK adults who do eat meat, poultry is consumed most often. Three quarters (76%) of meat-eating adults eat poultry at least once a week. In addition, over six in ten (64%) eat red meat at least weekly. Men eat red meat more frequently than women: seven in ten men (70%) report eating red meat at least once a week, whereas only six in ten women (59%) eat it that often.

Meat eating frequency for UK adults



Both meat-eaters and pescatarians eat fish much more frequently than shellfish. Six in ten meat-eaters (59%) have fish at least once a week, along with seven in ten pescatarians (72%). In contrast,

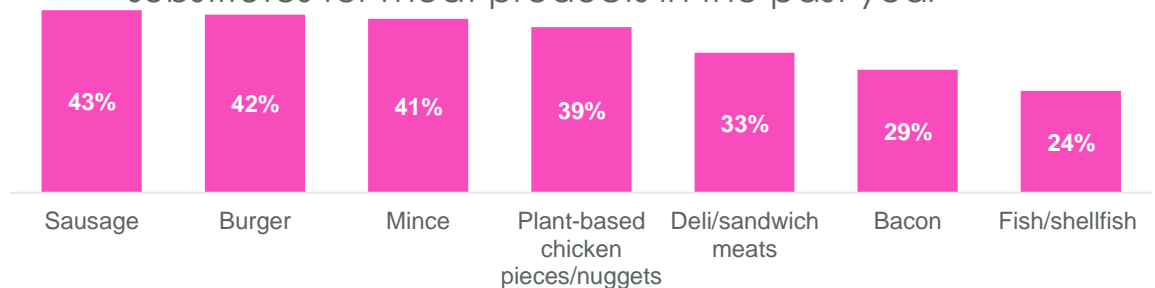
only a fifth of meat-eaters eat shellfish weekly (19%), and a third never eat it at all (33%). Interestingly, nearly a third of meat-eating adults 18-34 eat shellfish weekly (28%). A quarter of pescatarians (24%) eat shellfish at least once a week.

Plant-based meat consumption & preferences

Over half of UK adults have tried plant-based meat in the last year

About six in ten adults (58%) have tried at least one kind of plant-based meat substitute in the last year. Plant-based sausages, burgers, mince, and chicken are the most commonly eaten, with about four in ten saying that they have eaten each of these foods.

Percent of UK adults who have tried various plant-based substitutes for meat products in the past year



Young adults and non-meat eaters consume more of each type of plant-based meat than older adults and meat eaters. For each of the plant-based substitutes, almost a quarter of 18-34 year olds report eating them at least once a week (between 22% and 25% for all categories).

Not surprisingly, non-meat eaters are the most likely to eat plant-based meat substitutes on a weekly basis. Almost two fifths of non-meat eaters eat plant-based sausages weekly (36%).

Percent of UK adults who eat plant-based meat products weekly



Although meat eaters consume plant-based meat substitutes less frequently than non-meat eaters, a substantial portion of meat eaters also eat plant-based meat substitutes periodically. About one in five meat eating adults eat plant-based burgers (18%), sausages (19%), mince (19%), and/or chicken (19%) at least once a month, suggesting that the market for these products is not entirely made up of those who don't eat meat products.

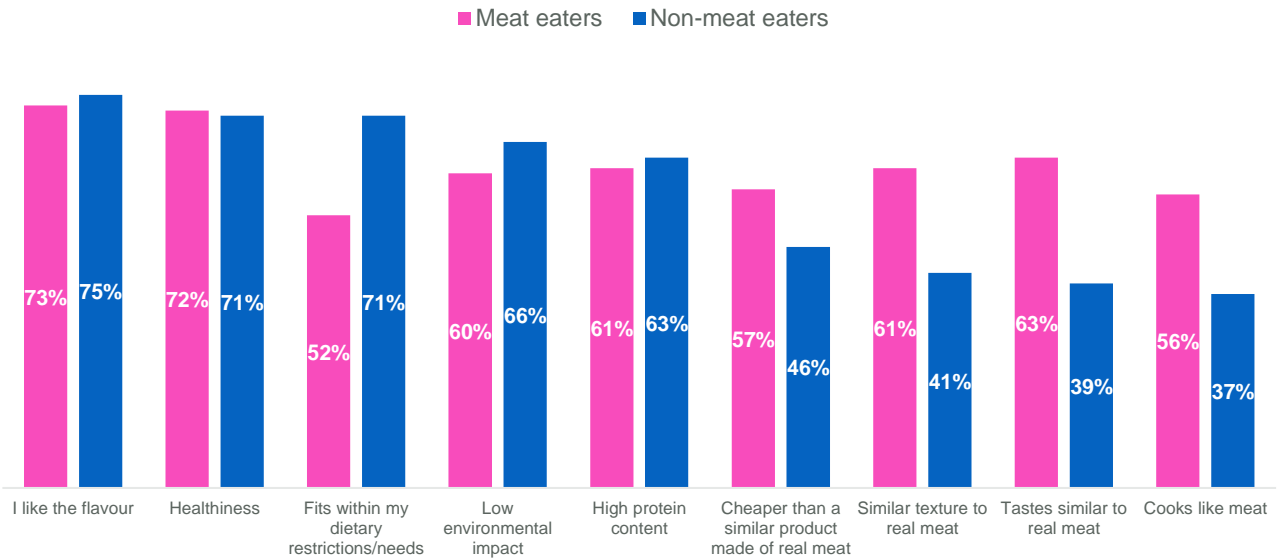
New vegetarians most likely to eat plant-based meat weekly

People who haven't eaten meat for less than five years are more likely to eat plant-based meat substitutes on a weekly basis than people who haven't eaten meat for longer. Two fifths of people who stopped eating meat less than five years ago eat plant-based burgers and/or sausage weekly, and about a third eat plant-based bacon, fish or shellfish, sandwich meat, chicken, and/or mince weekly. For people who haven't eaten meat for five to ten years, these rates decrease for most of these foods.

Good flavour, healthiness most important to UK adults when choosing plant-based meat

Plant-based meat eaters are most interested in whether their plant-based meat substitutes have a flavour they like (73%) and are healthy (72%). Three in five people who eat plant-based meat prefer plant-based meat products that have high protein content (61%) and/or a low environmental impact (61%). Less than three in five shop for plant-based meat substitutes based on whether the product tastes and/or has a similar texture to real meat (57% and 56% respectively).

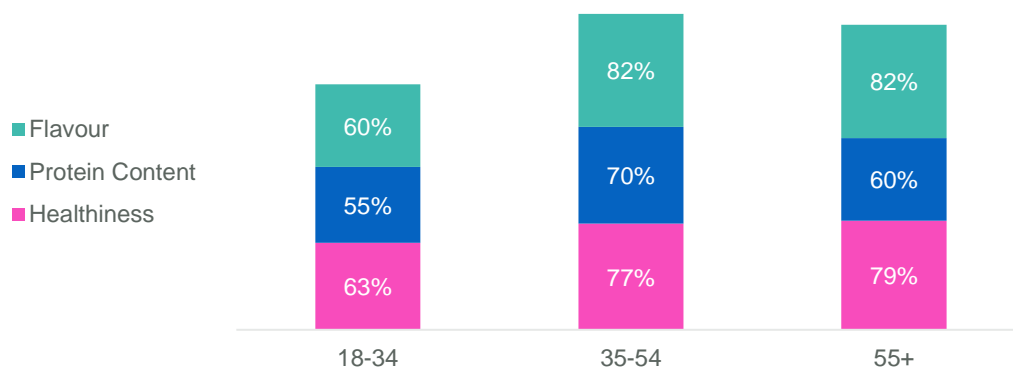
Importance of qualities of plant-based meat for meat eaters and non meat eaters



Plant-based meat eaters who also eat real meat are more concerned with plant-based products being similar to real meat. Six in ten meat eaters think that it's important for a plant-based meat product to taste like (63%), cook like (56%), and/or have a similar texture (61%) to real meat, whereas only four in ten non-meat eaters agree with this (39%, 37%, and 41% respectively). People who don't eat meat but stopped eating meat less than five years ago have preferences that are more similar to meat eaters: six in ten (58%) recent non-meat eaters want products with a similar texture to meat, and half want products with a similar flavour and/or that cook like meat (50% and 54% respectively.)

In general, older adults are more concerned about the healthiness (for example, low salt, low cholesterol, and few ingredients) of their plant-based meat. Middle-aged adults are most likely to consider protein content when choosing plant-based meat.

Percent who say these factors are important when choosing plant-based meat, by age



Bizarrely, only 60% of 18-34-year-olds say that liking the flavour is an important factor to them when choosing a plant-based meat substitute, and 11% say that this is unimportant. Price may not be the driving factor behind this indifference to flavour: Although 57% of 18-34-year-olds say that price is important when choosing these products, 60% of 35-54-year-olds agree with them. Adults 55 and over are less concerned with the price of these products; only 44% say that it's an important consideration.

Some UK adults remain uninterested in plant-based meat

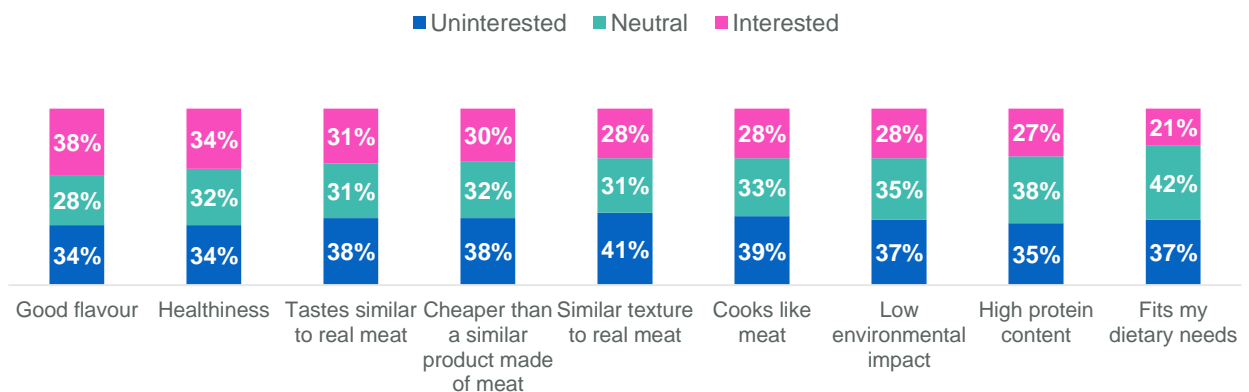
Not all non-meat eaters are interested in plant-based meat substitutes. Even for more popular plant-based products like mince, sausage, and burgers, over one in ten non-meat eaters are uninterested in trying these products. Given that many non-meat eaters cited not enjoying the taste of meat as one of their reasons for not eating meat, it makes sense that a portion of those consumers might not be interested in trying products that aim to imitate the experience of eating meat. However, very few non-meat eaters reported having never tried any plant-based meat substitutes at all.

For meat eaters, disinterest in plant-based meat products is higher. Almost half of meat eaters (47%) reported not having tried any plant-based meat substitute in the past year. For those who hadn't tried any of these products, over half (54%) said that they hadn't because they were happy eating the meat versions of these products.

Older adults were more likely to have not tried any plant-based meat products when compared to younger adults. Interestingly, however, young people were more likely to report that they had never heard of plant-based meat before the survey. One in five (18%) adults aged 18-34 said they had never heard of plant-based meat, but fewer than one in ten adults 35 and older (6% for 35-55 and 8% 55+) had never heard of these products. This suggests that older adults' lower interest in these products is not due to lack of exposure to their existence.

Across the board, people who haven't tried plant-based meat substitutes expressed disinterest or indifference towards any specific aspects of a new product.

Interest in trying plant-based meat product by factor, for those who have never tried it before



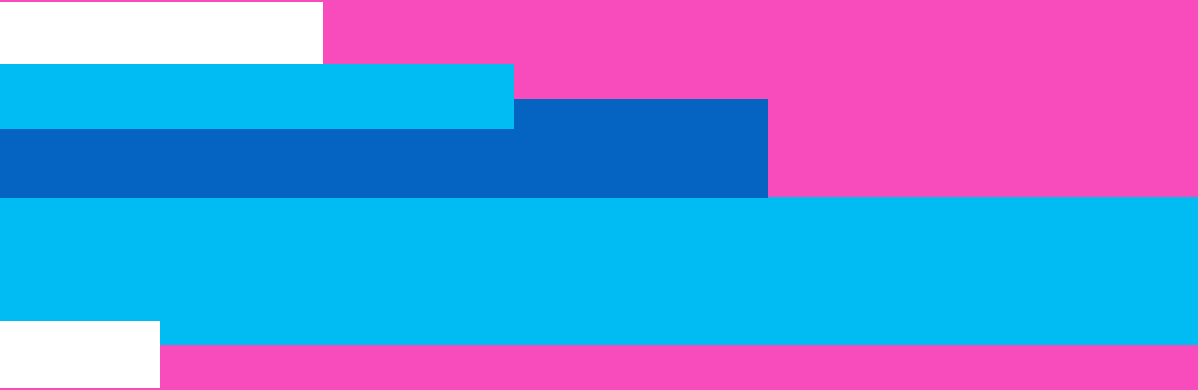


Younger people who'd never eaten these foods expressed more openness to trying plant-based meat products when compared to older adults. Almost half of 18-34 year olds said they'd have interest in a plant-based product if it had a good flavour (47%) and/or if the product was healthy (47%). In addition, younger consumers would be more interested in plant-based products that have high protein contents (44%), taste similar to meat (41%), cook similar to meat (40%), and are cheaper than comparable meat products (39%). Because younger consumers are more open to trying these new products, plant-based meat companies may have an opportunity to expand their customer base to younger audiences who have yet to try their products.

Takeaways

Although the majority of UK adults eat meat, a sizable minority (36%) avoid some or all meat products. As environmental concerns become more urgent, it's possible that more people will be drawn towards products that allow them to approximate the experience of eating meat without eating animals. The plant-based meat industry is growing, and there is a great opportunity for producers of these products to attract meat eating and non-meat eating customers alike.

UK consumers are more concerned with plant-based meat substitutes tasting good rather than these products tasting exactly like meat, which suggests that companies might have some leeway in terms of flavouring these products. Coupled with consumers' interest in healthy products, it's possible that plant-based meat companies could have success with simple products that taste good but are less processed than some of the products on the market that try to taste exactly like meat.



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