



Survey on England's attitudes towards plant-based meat alternatives

Prepared by Dr. Christopher Bryant
Alternative Proteins Association | 2023

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01 Executive Summary

In this report we present original survey data on opinions of plant-based meat alternatives in England. The key findings include:

1

The vast majority (96%) of consumers are **familiar with plant-based meat alternatives** and over 70% have eaten them.

2

Plant-based meat alternatives were **chosen 3 times more frequently** when these products were **significantly cheaper**

3

The majority (53–65%) would be **more positive** towards plant-based meat alternatives which are **made in the UK**.

4

The majority (60–71%) would be **more likely to buy** plant-based meat alternatives if they had **proven benefits** to society.

5

A large majority (71–76%) are **positive towards subsidizing** alternative proteins to make them cheaper.

6

A large majority (72–94%) agree the **UK government should be proactive supporting** the British alternative proteins industry.

02 Background & Methodology

Background

Alternative proteins have exploded in the UK over the last several years. From supermarket shelves to restaurant menus, meat and dairy alternatives are everywhere.

Here, we present an original survey conducted by the Alternative Proteins Association.

Research Objectives

- To **build on previous research, looking at adoption** of plant-based meat alternatives in the UK
- Examine **opinions of Brits** towards plant-based meat alternatives, and
- Explore areas where **policymakers can support the UK's alternative protein industry** in a sustainable and equitable way

Method

In February 2022, we asked residents of England about their views on plant-based meat alternatives. Participants were recruited through the online survey platform Prolific, the survey was completed on GuidedTrack, and data analysed using SPSS.

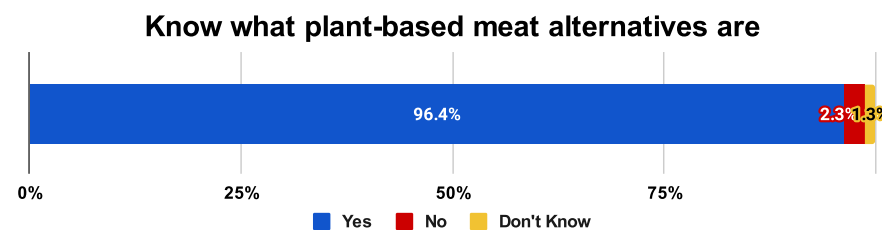
After removing responses that completed the survey excessively fast or slowly, and those who had moved away from England, we analysed data from a representative sample (on gender, age group, and region) of 1,000 consumers across England.

The full survey instrument can be found in Appendix A, and demographics can be found in Appendix B.

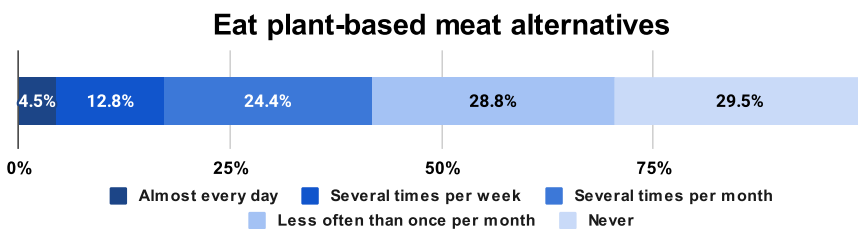
03 Findings

Familiarity and Use

First, participants answered questions about the familiarity with plant-based meat and how often they ate it themselves.



96%
Respondents knew what plant-based meat alternatives are



71%
Respondents had eaten plant-based meat alternatives

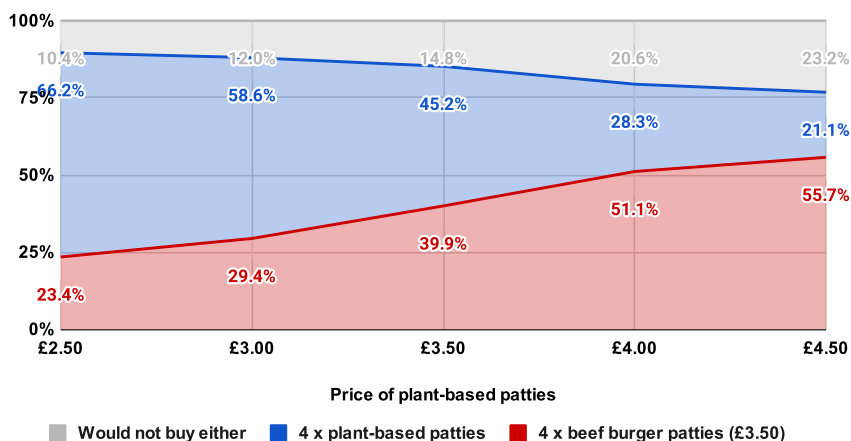
As shown, 71% of respondents said that they had eaten plant-based meat alternatives, while just 29% said they had never eaten plant-based meat alternatives.

This represents an increase from the 55% recorded by Harris Interactive in 2018, and the 63% recorded by YouGov in June 2021.

Price Sensitivity

Participants also indicated their preference between beef burgers and plant-based burgers when shown a range of different price points for plant-based meat.

Choice of different options at plant-based price points



45%
Respondents chose plant-based patties vs beef at price parity

59%
Respondents chose plant-based patties vs beef when priced lower

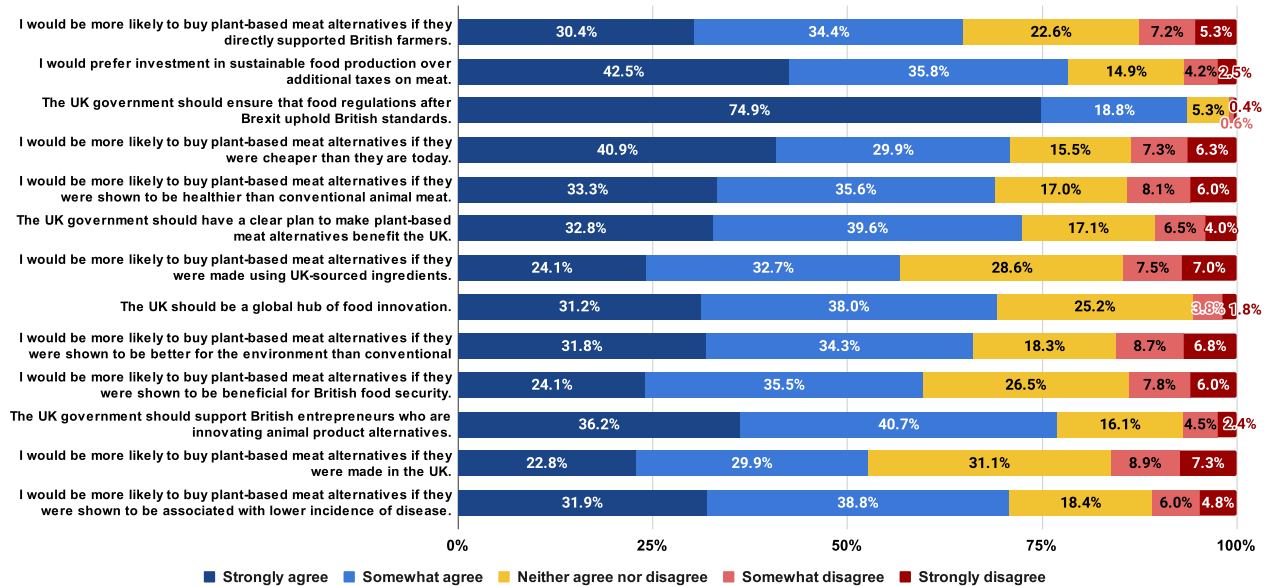
As shown, more respondents chose plant-based patties when they were priced lower (beef burgers were consistently priced at £3.50 for 4).

Currently, plant-based meat alternatives tend to be more expensive than meat; at these price points, we can see many more people selecting beef patties. When they are at price parity (both products at £3.50), more participants chose plant-based patties (45%) than chose beef (40%). At lower prices, many more participants chose plant-based patties – 59% when priced at £3.00, and 66% when priced at £2.50.

Broader Implications of Plant-Based Meat Alternatives

The following pages show agreement with a series of statements about plant-based meat alternatives.

Opinions of plant based meat alternatives



We can see the total proportion who agree/disagree by combining the two blue/red sections respectively.

As shown, more than 50% of participants agreed, and fewer than 20% disagreed with each of the statements.

MORE LIKELY TO BUY PLANT-BASED MEAT ALTERNATIVES IF THEY	% THAT AGREED
Directly supported British farmers	65%
Were made in the UK	53%
Were made using UK-sourced ingredients	57%
Were shown to benefit British food security	60%
Were associated with lower incidence of disease	71%
Were shown to be healthier than conventional meat	69%
Were better for the environment	66%
Were cheaper than they are today	71%

STATEMENT	% THAT AGREED
Would prefer investment in sustainable food production over additional taxes on meat	76%
Agree that UK Government should support British entrepreneurs innovating animal product alternatives	77%
Agree that the UK Government should have a clear plan to make plant-based meat alternatives benefit the UK	72%
Agree that UK should be a hub for global food innovation	79%
Agree that the UK Government should ensure food regulations after Brexit uphold British standards	94%

04 Appendices

Appendix A: Survey Questions

1. Do you know what plant-based meat alternatives are?

- Yes
- No
- Don't know

2. How often do you eat plant-based meat alternatives (e.g. plant-based burgers, plant-based sausages, plant-based nuggets)?

- Almost every day
- Several times per week
- Several times per month
- Less often than once per month
- Never

3. To what extent do you agree with the following statements? (Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree)

- I would be more likely to buy plant-based meat alternatives if they were cheaper than they are today.
- I would be more likely to buy plant-based meat alternatives if they were made in the UK.
- I would be more likely to buy plant-based meat alternatives if they were made using UK-sourced ingredients.
- I would be more likely to buy plant-based meat alternatives if they directly supported British farmers.
- The UK government should have a clear plan to make plant-based meat alternatives benefit the UK.
- The UK government should support British entrepreneurs who are innovating animal product alternatives.
- The UK should be a global hub of food innovation.
- The UK alternative protein industry should take advantage of our world-leading biotechnology capacities.
- The UK government should ensure that food regulations after Brexit uphold British standards.
- I would prefer investment in sustainable food production over additional taxes on meat.
- I would be more likely to buy plant-based meat alternatives if they were shown to be better for the environment than conventional animal meat.
- I would be more likely to buy plant-based meat alternatives if they were shown to be healthier than conventional animal meat.
- I would be more likely to buy plant-based meat alternatives if they were shown to be beneficial for British food security.
- I would be more likely to buy plant-based meat alternatives if they were shown to be associated with lower incidence of disease.

Appendix A: Survey Questions

4. Please select which option you would choose from the following (or no choice):

- 4 x beef burger patties - £3.50; 4 x plant-based burger patties - £2.50
- 4 x beef burger patties - £3.50; 4 x plant-based burger patties - £3.00
- 4 x beef burger patties - £3.50; 4 x plant-based burger patties - £3.50
- 4 x beef burger patties - £3.50; 4 x plant-based burger patties - £4.00
- 4 x beef burger patties - £3.50; 4 x plant-based burger patties - £4.50

Demographics

5. Please indicate your gender

- Male
- Female
- Other _____

6. Please enter your age in years

- _____

7. Which of the following best describes your diet?

- Omnivore
- Flexitarian
- Pescetarian
- Vegetarian
- Vegan

8. Which of the following foods have you eaten in the last 3 months?

- Red meat (beef, pork, lamb)
- Poultry (chicken, turkey)
- Seafood (fish, shellfish)
- Dairy (milk, cheese, yogurt)
- Eggs (including as ingredients)
- None of the above

Appendix A: Survey Questions

9. In which area do you live?

- Scotland
- Northern Ireland
- Wales
- North East
- North West
- Yorkshire and the Humber
- West Midlands
- East Midlands
- South West
- South East
- East of England
- Greater London
- I don't live in the UK

10. Which of the following best describes the area where you live?

- Rural
- Suburban
- Urban

11. What is the highest level of education you have completed?

- Some school
- GCSEs or equivalent
- A Levels or equivalent
- Bachelor's degree
- Master's degree
- Professional or doctorate degree

12. In general, how would you describe your political views?

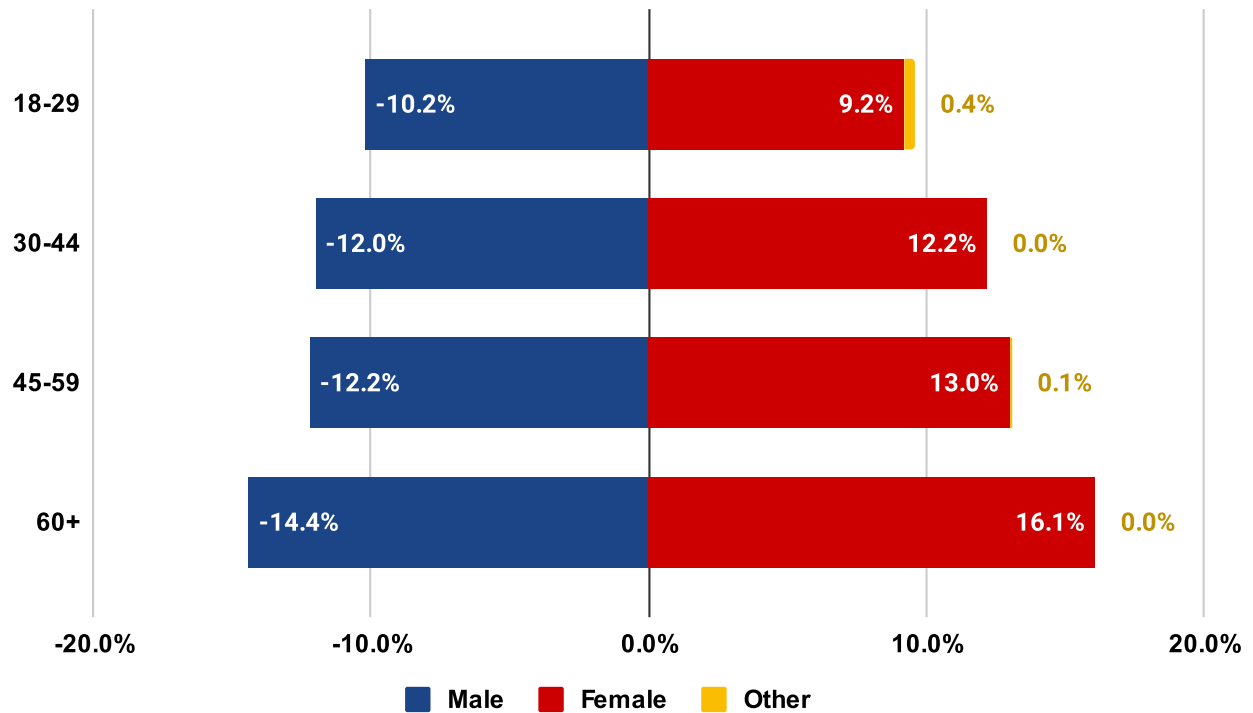
- Very conservative
- Conservative
- Moderate
- Liberal
- Very liberal
- Don't know/no political views

13. What is your annual household income before taxes?

- Less than £20,000
- £20,000 to £34,999
- £35,000 to £49,999
- £50,000 to £74,999
- £75,000 to £99,999
- Over £100,000

Appendix B: Demographics

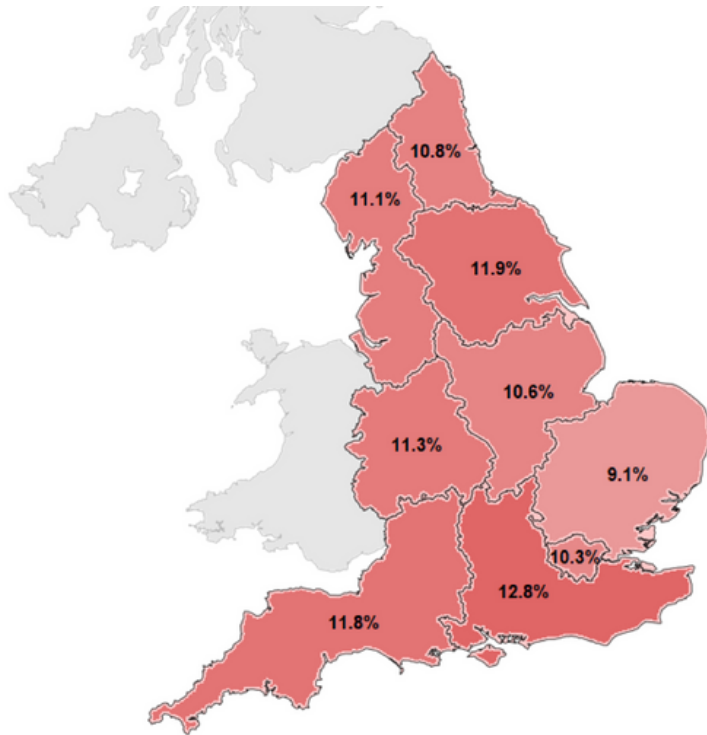
Before looking at the main findings, we present demographic charts to demonstrate the sample representativeness. Population pyramid showing the total proportion of participants in each age/gender group.



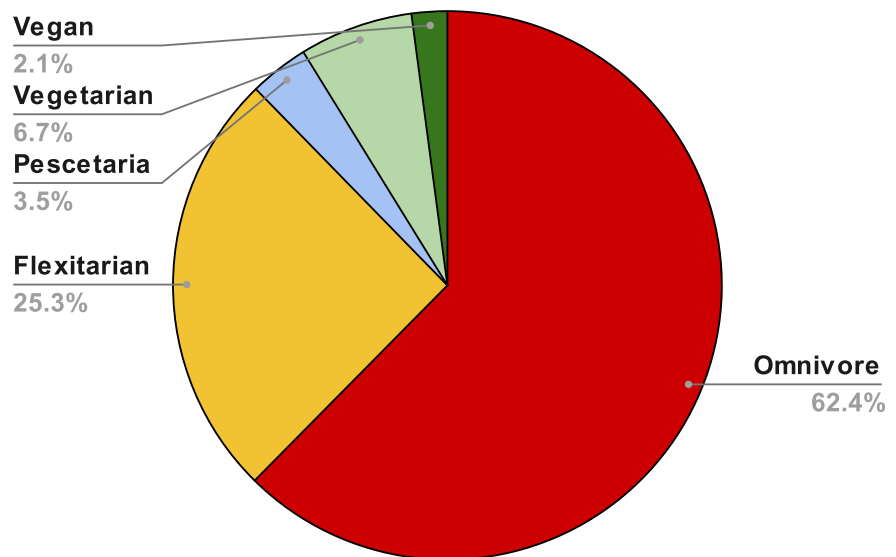
The sample was recruited to be representative of age/gender/region groups based on ONS data.

Appendix B: Demographics

Map of England showing the proportion of respondents from each region



Pie chart showing respondents by dietary group

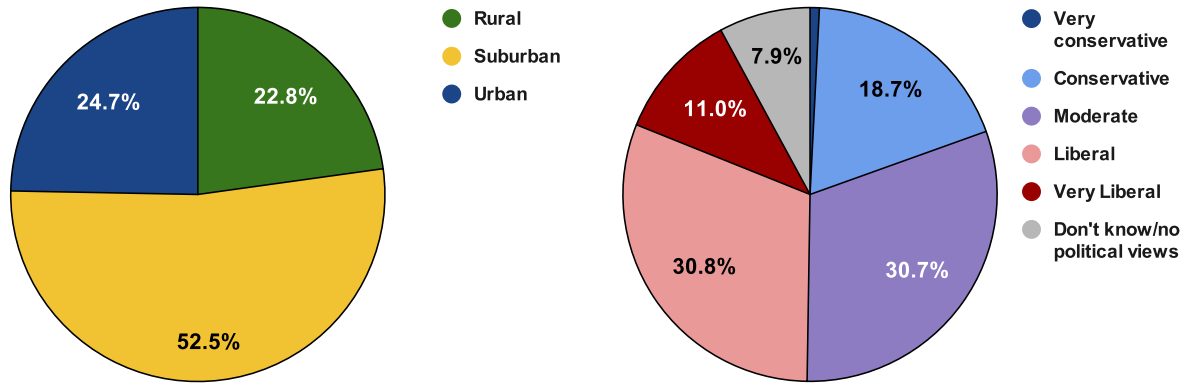


1 in 8 respondents were following meat-free diets
roughly consistent with other recent UK diet surveys.

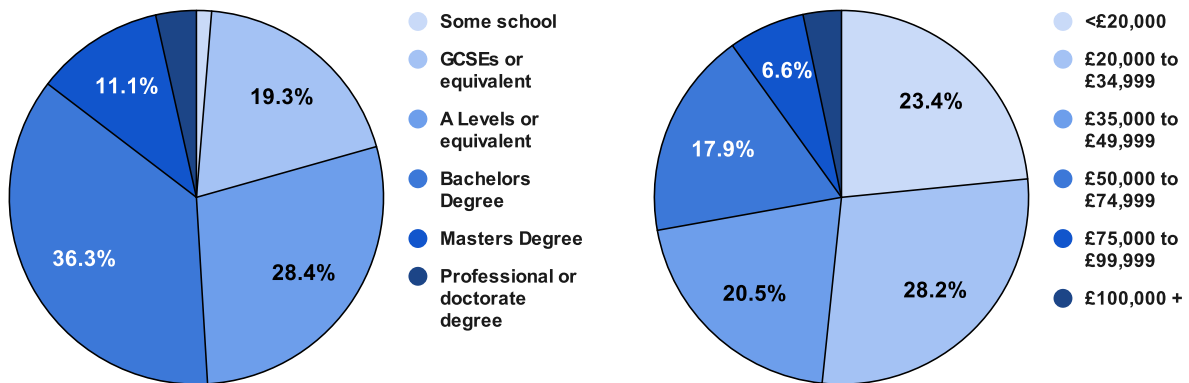
1 in 4 respondents identified as flexitarians
similar to the proportion of flexitarians in France and Germany

Appendix B: Demographics

Pie charts showing respondents by area and politics



Pie charts showing respondents by education and household income



As shown, the sample was representative in terms of age, gender, and region, and represented a range of political, education, and income backgrounds.

Thank you

Alternative Proteins Association

London, United Kingdom

alternativeproteinassociation.com

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