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Research report: **United Kingdom**
May 2025

Understanding plant-based category dynamics, motivations and consumers

About Plant Futures, HarrisX and GFI Europe

This research has been designed, funded and conducted jointly by Plant Futures Collective, HarrisX and the Good Food Institute Europe.

The Plant Futures Collective is a leading UK consultancy and insights partner for plant-based food businesses, building collective action to accelerate the shift toward healthier, more sustainable diets.

HarrisX is a global market research, data analytics, and strategy consulting company that leverages cutting-edge technology, data and creativity to drive strategic growth.

The Good Food Institute Europe is a nonprofit and think tank helping to build a more sustainable, secure and just food system by diversifying protein production. We champion the science, policies and investment needed to make alternative proteins delicious, affordable and accessible across Europe.

About the UK plant-based market: **Why is this research important?**

The UK's plant-based market has faced a turbulent few years.

Over the last decade, there has been a large expansion of plant-based brands and innovations in the UK, with many retailers introducing their own ranges, and plant-based milks becoming common in settings such as cafés. A wave of popularity led the UK to become Europe's second-largest retail market for plant-based foods, with market size roughly doubling between 2016 and 2020.

Since 2021, however, sales have fallen, with consumers citing taste and price as their top concerns. Cost has been a high priority for UK consumers due to the cost-of-living crisis – although the rate of inflation in the food sector has passed its peak – and remains relevant to the plant-based sector, where products often cost more per kg than their animal-based equivalents. There has also been a media backlash focusing on ultra-processed foods, but this narrative is increasingly being questioned.

However, data for the early part of 2024 suggests that the rate of decline may be slowing in some categories.

Meanwhile, plant-based meat and plant-based milk are bought by a large minority of households each year – showing that the market for plant-based foods extends beyond the relatively small percentage of people who follow a strict vegan or vegetarian diet.

The UK population is still interested in reducing their meat consumption, with many recognising the environmental and health benefits of doing so. Addressing consumers' concerns around factors such as taste and price is therefore key.

This research aims to explore current and intended consumption patterns, assess how plant-based foods and animal meat and dairy are perceived across a range of factors, and identify groups of consumers who want to reduce their animal meat and dairy consumption and/or eat more plant-based foods.

What's included in this report:

Research Details:

10-minute online survey conducted between 27 November and 17 December 2024

2,394 respondents in the UK, split as follows:

- n=1,062 Nationally Representative (Nat Rep) of the UK's adult population (18+)
  Sample is nationally representative by age, gender, income, ethnicity, and region

- n=1,332 additional plant-based consumers
  *Classified as having consumed at least one plant-based subcategory** in the last month*
  Sample is representative of the demographic profile derived from the Nat Rep sample

The total sample is weighted to accurately reflect the proportion of plant-based consumers (% of the population who have consumed at least one plant-based subcategory in the last month) within the Nat Rep adult population in the UK, ensuring they are not over-represented while maintaining the robustness of this consumer group

*Note: the unweighted base sizes are displayed on each page, please refrain from using these figures for any calculations

1. Category Dynamics

Category dynamics:

Summary & implications

What have we learnt?

While 41% of the UK population report actively reducing or eliminating meat from their diets, the majority still consume animal-based products regularly. This research highlights notable fluidity in self-identified diet types (eg, some self-identified vegetarians/vegans have consumed meat on odd occasions over the past year).

Only 56% of UK adults report any consumption in the previous month of the eight plant-based categories studied in this research. This suggests that many consumers have not been driven to try plant-based products. However, there is positive momentum among current consumers of plant-based foods, who report an overall increase in their consumption across all subcategories in the last year.

UK adults say they are cutting back on red meat and dairy desserts, while increasing their intake of white meat and fish. Among those reducing their consumption of animal meat and dairy, the primary drivers of change are health considerations, cost, and taste preferences.

A significant proportion of UK adults claim they intend to increase their consumption of plant-based foods and/or reduce animal-based products, indicating a potential shift towards more sustainable and health-conscious dietary choices. But this should be taken cautiously as we know intentions don’t always lead to behaviour change.

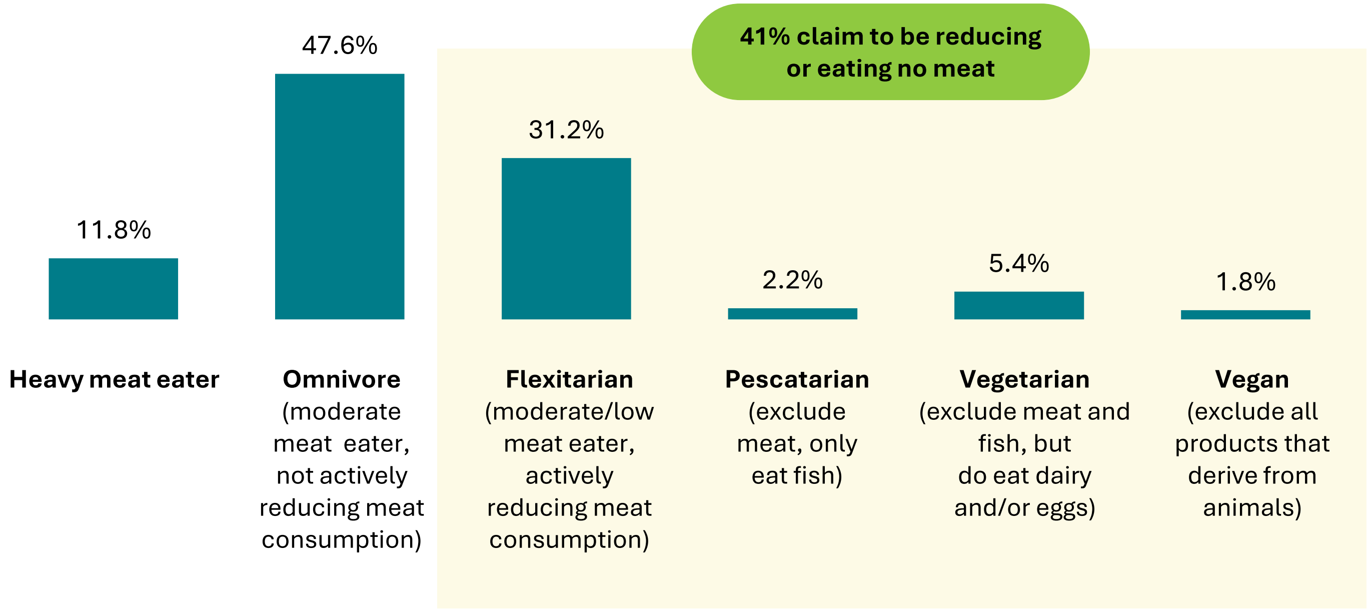
Implications

- To reach the large flexitarian market as well as omnivores who are open to trying plant-based foods, there is an opportunity for plant-based brands to make their marketing and visual identity **welcoming to all dietary groups.**
- Many potential consumers of plant-based products also consume animal-based foods. Plant-based brands can consider **framing plant-based foods as complementary to animal-based foods** instead of using narratives about eliminating animal meat and dairy consumption.
- Plant-based meat consumption is more common among people who report reducing their red meat consumption, suggesting that there is an opportunity for brands to cater to the needs of this group by providing **plant-based versions of red meat products** such as sausages, mince and steak.
- Since self-reported eating patterns and intention to change do not always match actual current and future behaviour, it is also important to understand the **underlying motivational drivers of change** – which the next section of this report explores.

41%

of the UK population report following diets that are either reducing or contain no meat.

Current diet (claimed/self-identified)
Among the total UK adult population, based on descriptions below



- 59% are heavy meat eaters/omnivores (not actively reducing meat).
- 31% are flexitarians (actively reducing meat consumption).
- 2% are pescatarians, 5% are vegetarians and 2% are vegans.
- This aligns with similar research from YouGov (2025).

B8. How would you best describe your diet?
Unweighted N = 2,394

Almost all UK adults report having consumed at least one animal-based subcategory in the last week.

- Dairy and milk consumption are most common.
- Self-identified Flexitarians are most distinct from Omnivores in relation to their red meat consumption (72% monthly for Flexitarians vs 90% for Omnivores).

Are diets more fluid than we might think?

Dietary definitions are not always rigidly applied. This research found that a small minority of vegetarians report eating some meat, and a minority of vegans report eating some meat and/or dairy.

Claimed incidence of animal-based subcategory consumption
Among the total UK adult population

Type of animal-based food	In the last 12 months	In the last month	In the last week
At least one animal-based subcategory	**98%**	**98%**	**97%**
Dairy (eg cheese, butter, etc)	93%	88%	81%
Milk (eg cow milk, goat milk, etc)	91%	86%	80%
White meat (eg chicken, turkey, etc)	89%	84%	73%
Eggs (from chickens, ducks, etc)	90%	82%	68%
Red meat (eg beef, pork, lamb, etc)	84%	76%	58%
Dairy-based desserts (eg, chocolate, cookies, ice cream)	87%	72%	51%
Fish or seafood (eg salmon, mussels, etc)	79%	67%	47%

B1/2/3. In the last 12 months/ month/ week, which of the following items have you eaten or drunk…?
Unweighted N = 2,394

56%

of UK adults report plant-based consumption in the previous month, demonstrating further room for growth.

- Monthly penetration is highest for vegetable-based meals at 37%, followed by plant-based milk at 27%, and plant-based meat at 23%.
- Weekly consumption of plant-based subcategories is low (up to 26% for vegetable-based meals).

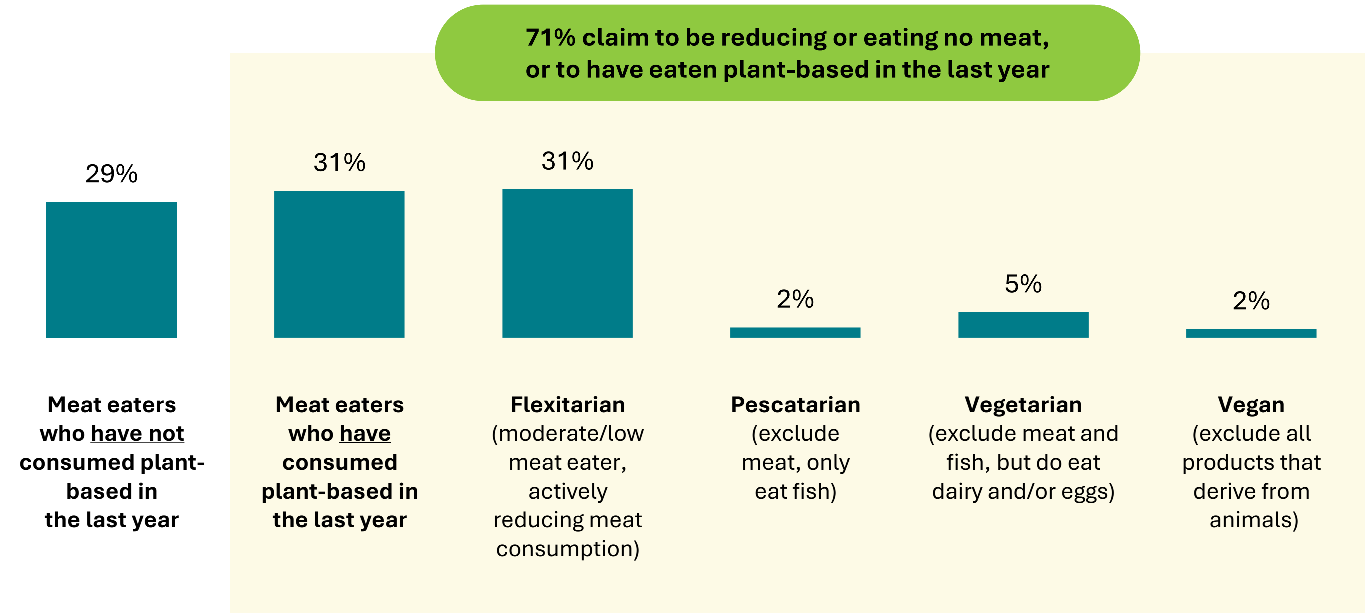
Claimed incidence of plant-based subcategory consumption
Among the total UK adult population

Type of plant-based food	In the last 12 months	In the last month	In the last week
At least one plant-based subcategory	65%	56%	44%
Vegetable based meals (eg, made with falafel, lentils, chickpeas, beans, etc)	46%	37%	26%
Plant-based milk (eg, oat milk, almond milk, soy milk, etc)	38%	27%	19%
Plant-based meat (eg, alternatives to chicken, mince, burgers/sausages, etc)	34%	23%	14%
Plant-based dairy (eg, alternatives to cheese, yoghurt, etc)	26%	16%	10%
Plant-based desserts (eg, alternatives to chocolate, cookies, ice cream, cakes, etc)	22%	13%	8%
Tofu, seitan, tempeh	18%	12%	7%
Plant-based fish/seafood (eg, alternatives to salmon, sushi, etc)	12%	7%	4%
Plant-based eggs / egg alternatives	10%	6%	4%

B1/2/3. In the last 12 months/ month/ week, which of the following items have you eaten or drunk…?
Unweighted N = 2,394

The size of total addressable plant-based market increases to 71% when including meat eaters who also report consuming plant-based in the last year.

Current self-identified diet & reported plant-based consumption in the last year
Among the total UK adult population



- In the past year, 52% of all heavy meat eaters/omnivores have consumed at least one plant-based subcategory.
- This shows that the potential market for plant-based foods extends even further than self-identified flexitarians.

B8. How would you best describe your diet?
Unweighted N = 2,394

31% of UK adults claim to have reduced their consumption of red meat. This is offset by increased consumption of white meat and fish.

- Some people in the UK also report reducing their dairy-based desserts consumption.
- However, most people report no change in their consumption levels of animal-based foods over the last year.

Are consumers substituting red meat with plant-based meat alternatives?

38% of red meat 'reducers' have consumed plant-based meat in the last month, compared to just 27% for people who have not reduced their red meat consumption.

Claimed change in consumption frequency of animal-based subcategories over the last 12 months Among UK adults who have consumed each subcategory within the last 12 months

Type of animal-based food	A lot/a bit less	About the same	A lot/a bit more	Net momentum (increase – decrease)
White meat (eg, chicken, turkey, etc)	12%	62%	26%	+14%
Fish or seafood (eg, salmon, mussels, etc)	19%	56%	25%	+6%
Eggs (from chickens, ducks, etc)	16%	63%	21%	+5%
Milk (eg, cow milk, goat milk, etc)	14%	69%	16%	+2%
Dairy (eg, cheese, butter, etc)	15%	68%	17%	+2%
Dairy-based desserts (eg, chocolate, cookies, ice cream)	27%	57%	17%	-10%
Red meat (eg, beef, pork, lamb, etc)	31%	55%	14%	-17%

B4. How has the frequency at which you have eaten/drunk the following changed over the last 12 months? Minimum base size of 1,894.

The main reasons for reducing animal meat and dairy are linked to cost, health and taste preferences.

- Many consumers who have reduced their meat and dairy cite reasons related to health.
- Cost – related to the price of meat and dairy in the context of the rising cost-of-living – is another key reason for meat and dairy reduction.

Reasons for reducing animal-based category consumption over the last 12 months (coded verbatim)
Among UK adults who reduced their consumption of animal-based foods within the last 12 months

Related to health

Cost	Cost of animal-based food & drink in the rising cost of living	25%
Health	Healthier lifestyle and diet	24%
Taste preferences	Changing taste preferences	19%
Lifestyle changes	Shift to vegetarian/vegan diets, dietary experimentation	12%
Medical conditions	Managing health conditions (eg, diabetes, high cholesterol)	7%
Environmental concerns	Environmental impact of animal-based food production	7%
No specific reason	No reason given	7%
Weight management	Managing weight, reducing calorie intake	5%
Ethical concerns	Animal welfare and ethical treatment in farming	3%
Availability	Changes in produce availability	2%

B7. You have told us that you have been eating less of the following animal-based products over the last 12 months. Please tell us in your own words why this is? Unweighted N = 1,264

Among plant-based consumers, there has been positive momentum in claimed consumption patterns over the last year.

- Consumers of plant-based foods report an increase in consumption over the last 12 months.
- This is consistent across subcategories.
- Some of the increases will be driven by trial by new consumers. The numbers do not capture lapsed consumers who reduced consumption to zero in the last year – which explains how the reported increases can be consistent with falling **retail sales**.

Claimed change in consumption frequency of plant-based subcategories over the last 12 months Among UK adults who have consumed each subcategory within the last 12 months

Type of plant-based food	A lot/a bit less	About the same	A lot/a bit more	Net momentum (increase – decrease)
Vegetable based meals (eg, made with falafel, lentils, chickpeas, beans, etc)	15%	44%	41%	+26%
Plant-based milk (eg, oat milk, almond milk, soy milk, etc)	17%	41%	42%	+26%
Plant-based eggs / egg alternatives	20%	34%	45%	+25%
Plant-based meat (eg, alternatives to chicken, mince, burgers/sausages, etc)	18%	42%	40%	+22%
Plant-based dairy (eg, alternatives to cheese, yoghurt, etc)	18%	43%	39%	+21%
Plant-based fish/seafood (eg, alternatives to salmon, sushi, etc)	24%	33%	43%	+19%
Plant-based desserts (eg, alternatives to chocolate, cookies, ice cream, cakes)	21%	39%	39%	+18%
Tofu, seitan, tempeh	21%	41%	38%	+17%

B4. How has the frequency at which you have eaten/drunk the following changed over the last 12 months? Minimum base size of 367.

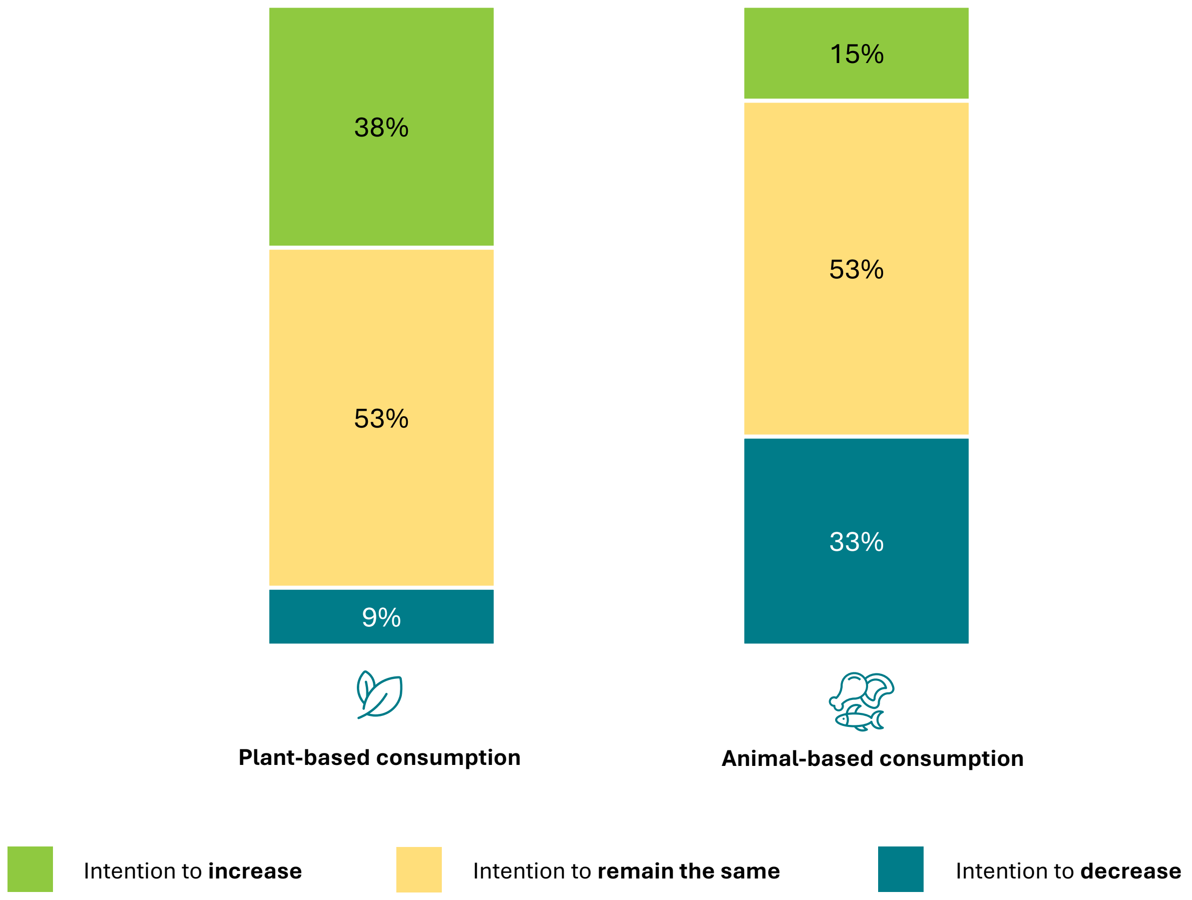
Claimed intentions among UK adults point to a willingness to increase consumption of plant-based and reduce animal meat and dairy.

- 33% of UK adults intend to decrease their animal meat and dairy consumption.
- 38% of UK adults intend to increase their plant-based foods consumption.

Watch out! We know claimed intention doesn't always lead to actual behaviour changes.

We know from other data sources that there has been a stagnation of UK plant-based food sales in recent years. While consumer intention might be there, it doesn't guarantee behaviours always follow intentions.

Overall intention to increase/decrease plant-based and animal-based consumption
Among the total UK adult population



C1. Firstly, are you looking to decrease or increase the amount of plant-based foods you consume? C3. Firstly, are you looking to decrease or increase the amount of animal meat and dairy you consume? Unweighted N = 2,394

2. Consumer, Capability, Opportunity & Motivation

What is the **COM-B model** and how have we applied it as part of this research?

What is the COM-B model?

The COM-B model is a framework for understanding behaviour change. It identifies three essential components that must be present for any behaviour to occur. These are:

- **Capability (C):** The individual's ***physical*** and ***psychological*** ability to perform the behaviour in question.
- **Opportunity (O):** The ***social*** and ***physical*** external factors that make the behaviour in question possible.
- **Motivation (M):** The internal processes that direct and encourage the behaviour, including both ***reflective*** (conscious) and ***automatic*** (unconscious) motivations.

These components interact to influence behaviour, making the COM-B model a comprehensive tool for designing interventions aimed at behaviour change.

How has it been applied in this research?

The two behaviours we're interested in are the intent to increase the consumption of plant-based foods and the intent to reduce consumption of animal meat and dairy.

Existing research and knowledge was consolidated to create a longlist of attributes that fall under each of the COM-B components.

There were 16 COM-B questions asked about plant-based foods, and 16 about animal meat and dairy foods. The questions about animal meat and dairy mirrored the questions asked about plant-based foods so we could make direct comparisons.

Understanding plant-based and animal-based foods through this COM-B lens can help identify interventions that could increase the behaviours we're interested in.

Consumer capability, opportunity and motivation: **Summary & implications**

What have we learned?

Given the smaller consumer base of plant-based foods, it's unsurprising that overall perceptions of animal-based meat and dairy are rated higher compared to their plant-based equivalents. This disparity is most evident in areas such as social proof, confidence in meal preparation, taste preference, and habitual consumption behaviours.

However, plant-based foods have significant leverage that can drive increased consumption, such as people feeling good after eating them, environmental benefits, and health advantages.

Positive factors associated with plant-based foods are encouraging people towards flexitarianism. Flexitarians are more likely to feel good after eating plant-based foods, enjoy their taste, and be influenced by considerations of animal welfare and environmental sustainability, compared with meat eaters.

On the other hand, negative factors associated with animal-based products are pushing people away from them. Flexitarians are less likely to view animal-based meat and dairy as good value for money, to feel good after consuming them, or to enjoy their taste.

Implications

- To counteract consumers' lack of familiarity with or habitual consumption of plant-based foods, retailers and foodservice outlets can present them as a **mainstream, normal and easily available** option, for example by:
    - Using **integrated-segregated merchandising**, where plant-based options are clearly visible alongside conventional meat and dairy.
    - Experimenting with plant-based **default options** on menus.
- Plant-based brands should consider using social proof in marketing campaigns, such as **endorsement by popular social media influencers**.
- Support consumers in cooking with plant-based products by providing **instructions and recipe suggestions –** for example by using on-package QR codes to link to short instructional/inspirational videos.
- Brands and foodservice outlets can emphasise the feel-good factor by using language that focuses on **taste and enjoyment**.
- Product developers should continue investing in bringing down the **cost** of plant-based foods while meeting consumers' **taste expectations**.

There are far greater levels of capability when it comes to animal meat and dairy vs plant-based.

- Confidence preparing meals using animal meat and dairy is significantly stronger vs plant-based foods.
- There is a lack of knowledge about the nutritional value of plant-based foods, but 50% agree they are important for a balanced diet.
- UK adults think plant-based foods and animal-based foods are similarly important for specific health and fitness goals.

Plant-based / animal-based <u>capabilities</u>
Among the total UK adult population

	Plant-based foods (PB)	Animal-based meat & dairy (AB)	%-point difference (PB-AB %)
% who **are confident about cooking/preparing** a tasty meal using [plant-based foods / animal-based meat and dairy]	45%	83%	-38%
% who **find it easy to judge the quality** of [plant-based foods / animal-based meat and dairy]	35%	65%	-30%
% who **think it's important to eat** [plant-based foods / animal-based meat and dairy] **for a nutritionally balanced diet**	50%	80%	-30%
% who **know some/a lot about the nutritional value** of [plant-based foods / animal-based meat and dairy]	35%	60%	-25%
% who **think it's important to eat** [plant-based foods / animal-based meat and dairy] **for specific health issues or fitness goals**	33%	39%	-6%

Unweighted N = 2,394
NETs calculated on Top 4 Box of a 9-point scale.

The opportunity for UK adults to consume plant-based foods is limited vs animal meat and dairy.

- The plant-based category is perceived as having worse availability and worse value for money vs animal meat and dairy.
- There is far less social proof for plant-based, with fewer friends/family members consuming plant-based vs animal meat and dairy.

Plant-based / animal-based opportunities
Among the total UK adult population

	Plant-based foods (PB)	Animal-based meat & dairy (AB)	%-point difference (PB-AB %)
% who **have some/lots of friends and family who** eat [plant-based foods / animal-based meat and dairy]	24%	86%	-62%
% who **think the availability** of [plant-based foods / animal-based meat and dairy] **is good**	48%	84%	-36%
% who think [plant-based foods / animal-based meat and dairy] **are good value for money**	30%	58%	-28%
% who **often see adverts, news or content about** [plant-based foods / animal-based meat and dairy]	29%	42%	-13%

Unweighted N = 2,394
NETs calculated on Top 4 Box of a 9-point scale.

The strength of consumer motivations are more similar between plant-based and animal meat & dairy.

- Animal welfare, sustainability considerations, processing and industry trust between plant-based and animal meat and dairy draw similar levels of motivation.
- However, 64% of people choose animal meat and dairy out of habit vs 27% for plant-based foods.
- Almost twice as many people enjoy the taste of animal meat and dairy compared to plant-based.

What does 'feeling good' mean in this context?

'Feeling good' can be attributed to feeling full or satisfied after eating, social comfort, enjoyment, and/or a sense of normality.

Plant-based / animal-based motivations
Among the total UK adult population

	Plant-based foods (PB)	Animal-based meat & dairy (AB)	%-point difference (PB-AB %)
% who **often** choose [plant-based foods / animal-based meat and dairy] **out of habit**	27%	64%	-37%
% who **enjoy the taste of** [plant-based foods / animal-based meat and dairy]	44%	81%	-37%
% who **feel good about themselves after eating** [plant-based foods / animal-based meat and dairy]	47%	64%	-17%
% who **trust the** [plant-based foods / animal-based meat and dairy] **industry**	40%	53%	-13%
% who **think** [plant-based foods / animal-based meat and dairy] **are natural**	40%	51%	-11%
% who **are influenced by animal welfare when considering** [plant-based foods / animal-based meat and dairy]	40%	51%	-11%
% who **are influenced by environment/ sustainability when considering** [plant-based foods / animal-based meat and dairy]	38%	40%	-2%

Unweighted N = 2,394
NETs calculated on Top 4 Box of a 9-point scale.

There are some stand-out differences in perceptions towards plant-based foods between UK flexitarians and meat eaters.

These differentiators can be thought of as positive plant-based levers that encourage people towards flexitarianism.

Flexitarians are more likely to:

- Feel good* about themselves after eating plant-based foods.
- Enjoy the taste of plant-based foods.
- Be influenced by animal welfare when considering plant-based foods.
- Be influenced by the environment/ sustainability when considering plant-based foods.

**'Feeling good' can be attributed to feeling full or satisfied after eating, social comfort, enjoyment, and/or a sense of normality.*

Biggest differences in plant-based COM-B factors between flexitarians and meat eaters
Flexitarians (Flexitarian/Pescatarian) and meat eaters (Heavy Meat Eater/Omnivore)

Plant-based food	Flexitarians/ pescatarians	Meat Eaters	%-point difference (flex-meat %)
% who **feel good* about themselves after eating** plant-based foods	62%	34%	+27%
% who **enjoy the taste of** plant-based foods	58%	31%	+27%
% who **are influenced by animal welfare when considering** plant-based foods	54%	28%	+26%
% who **are influenced by environment/ sustainability when considering** plant-based foods	52%	27%	+25%

Meat eaters N = 1,173 Flexitarians N =968
NETs calculated on Top 4 Box of a 9-point scale.

There are also some big differences in perceptions of animal-based foods between UK flexitarians and meat eaters.

These differentiators can be thought about as negative animal-based factors that push people into flexitarianism.

Flexitarians are less likely to:

1. Enjoy the taste of animal-based meat and dairy.
2. Feel good* about themselves after eating animal-based meat and dairy.
3. Think that animal-based meat and dairy are good value for money.

**'Feeling good' can be attributed to feeling full or satisfied after eating, social comfort, enjoyment, and/or a sense of normality.*

Biggest differences in <u>animal-based</u> COM-B factors between Meat Eaters & Flexitarians
Flexitarians (Flexitarian/Pescatarian) and meat eaters (Heavy Meat Eater/Omnivore)

Animal-based meat & dairy	Flexitarians/ pescatarians	Meat Eaters	%-point difference (flex-meat %)
% who **<u>enjoy the taste of</u>** animal-based meat and dairy	52%	76%	-24%
% who **<u>feel good* about themselves after eating</u>** animal-based meat and dairy	52%	74%	-22%
% who think animal-based meat and dairy **<u>are good value for money</u>**	47%	67%	-20%

Meat eaters N = 1,173 Flexitarians N =968
NETs calculated on Top 4 Box of a 9-point scale.

3. Consumer Profiling

Consumer Profiling:
Summary & implications

What have we learned?

The UK population can be categorised into **four different cohorts** – outlined on the next page – based on their future intentions to increase plant-based consumption and/or decrease animal-based consumption, regardless of current dietary patterns.

The data identified 51% of the UK population as intending to change their current consumption by reducing animal-based consumption and/or increasing plant-based consumption. 20% of UK adults have intentions to do both.

We have profiled these four consumer cohorts to understand their:

- Demographic profile.
- Diet, health and fitness profile.
- Notable perceptions of plant-based and animal-based meat and dairy.
- Values and lifestyle profile.

This segmentation and profiling allows for a more nuanced understanding of UK consumers and their flexitarian intentions.

Implications

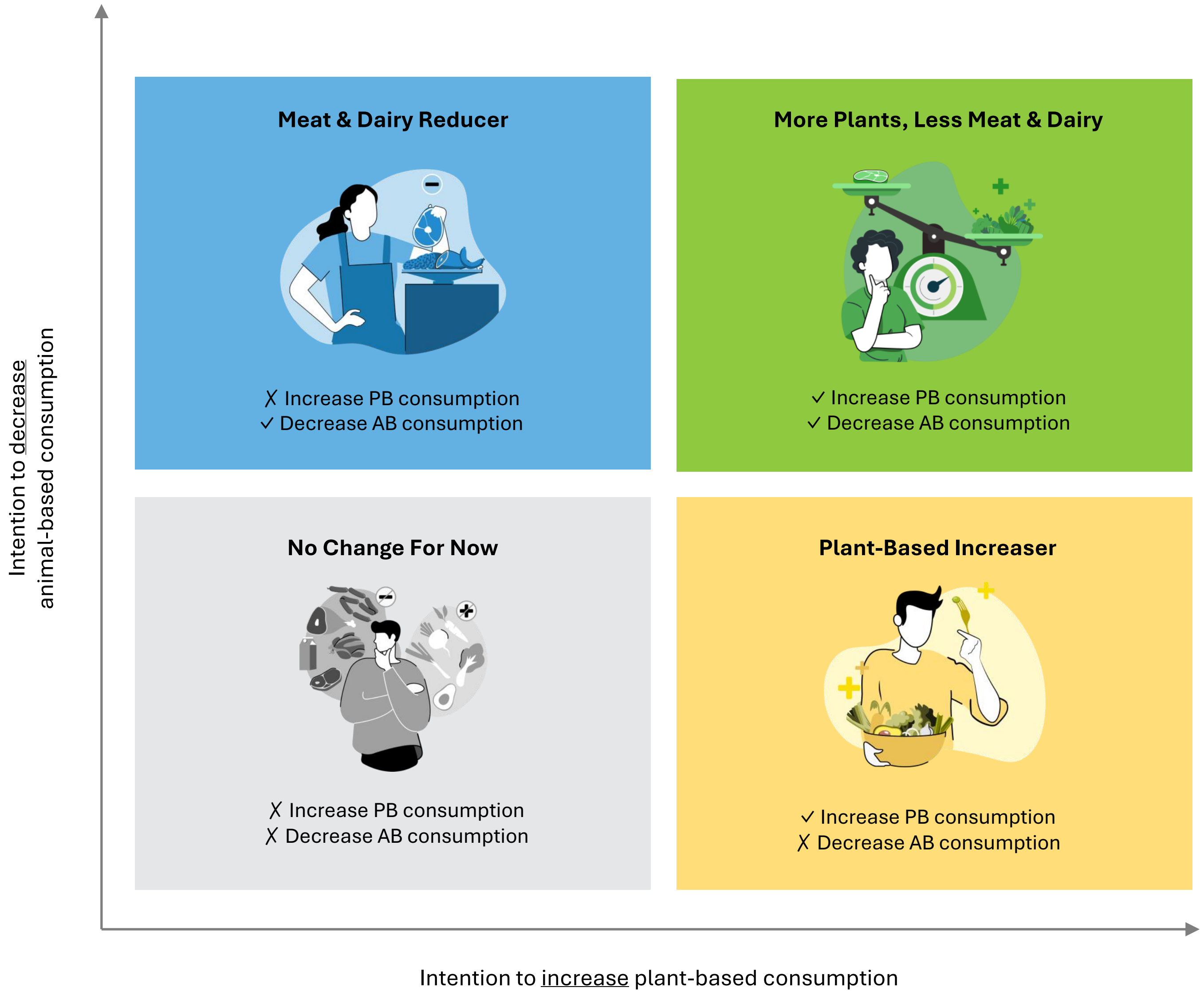
- There is an opportunity for brands to consider which of the four cohorts identified in this research are relevant to their products and how to optimise messaging based on consumers' demographics, values and goals. Two of the cohorts are looking to increase plant-based consumption, but they differ in their priorities as shown below.
- The plant-based industry can reach the **Plant-Based Increaser** cohort – those intending to eat more plant-based foods without reducing animal meat and dairy – by:
    - Targeting **younger, higher income** consumers, especially men and Londoners.
    - Highlighting the **nutritional attributes** of plant-based foods, particularly high protein and high fibre.
    - Showcasing plant-based foods' relevance for fitness goals eg **building muscle**.
- The **More Plants, Less Meat & Dairy** cohort – those intending to cut back on animal meat and dairy at the same time as eating more plant-based – can be reached by:
    - Highlighting the benefits of products for **animal welfare** and the **environment.**
    - Basing marketing on achieving a **healthy lifestyle balance** (without compromise on taste).
    - Supporting goals of **losing weight / reducing body fat.**

We have understood UK adult consumers in a new way

By looking at:

1. Their intention to reduce animal meat and dairy
2. Their intentions to increase plant-based foods

These two metrics create four unique consumer cohorts:

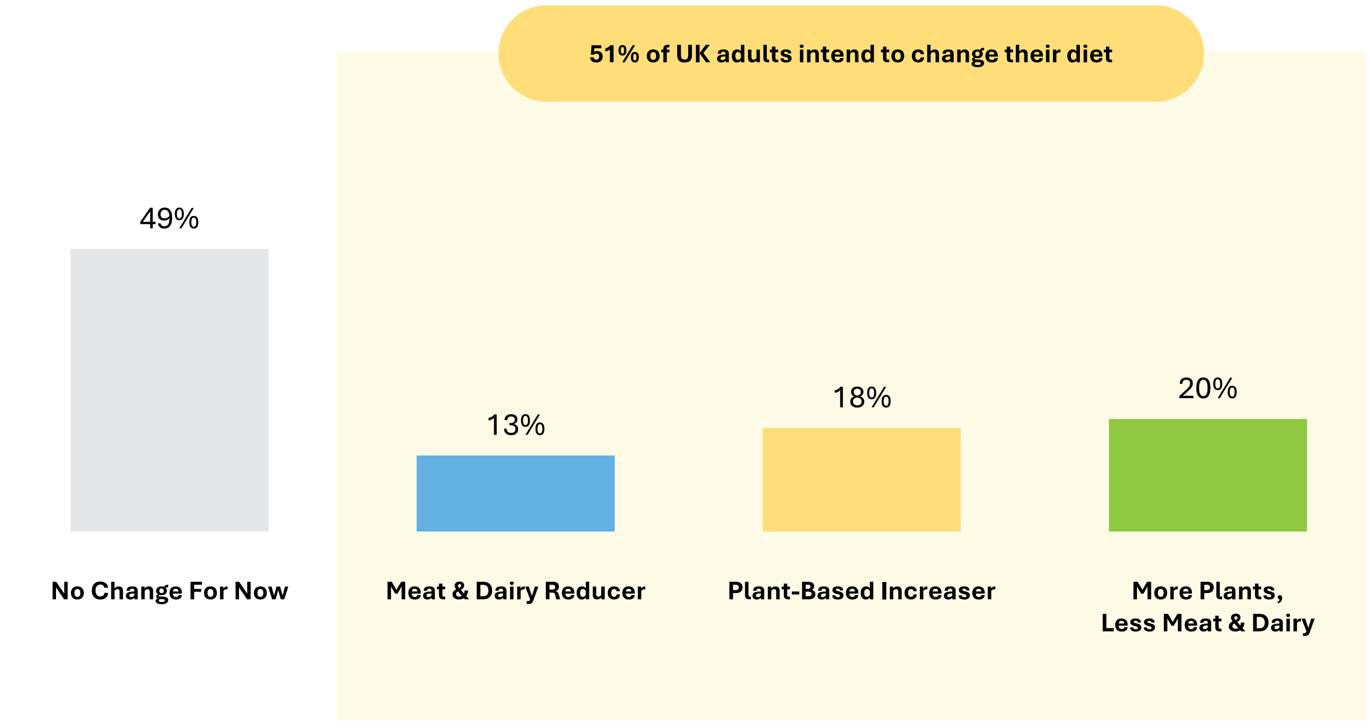


51%

of UK adults intend to change their diet, either by increasing their plant-based consumption, and/or by reducing animal meat and dairy.

20% of the UK population intend to do both. The More Plants, Less Meat & Dairy cohort intends to both reduce their meat and dairy consumption AND increase their consumption of plant-based foods.

Proportion (%) of each consumer cohort among all UK adults
Among the total UK adult population



49% of the UK population

Who are the "No Change for Now" cohort?

Do not intend to reduce their consumption of animal meat and dairy and do not intend to increase their consumption of plant-based foods

Click here for profiling data tables in the appendix

Demographic profile
- 53% are female.
- Skews slightly older (63% are aged 45 or above).
- Highest proportion of low household income (49% have an annual household income of below £30k).
- Lowest educated – 45% are educated up to secondary school level (or lower).

Diet, health and fitness profile
- Self-identified diet: heavy meat eater/omnivore (78%), flexitarian/pescatarian (17%), vegetarian/vegan (6%)
- Least likely to have any health or fitness goals (36% have no goals).
- Unlikely to have any special dietary requirements (83% have none).

Notable category capability, opportunity and motivation factors
- Plant-based foods:
    - Lower capability, motivation and opportunity for plant-based foods overall.
    - Less likely to: feel good after eating plant-based foods, like the taste and be influenced by environment/sustainability when considering plant-based foods.

- Animal-based meat and dairy:
    - Moderately high capability, motivation and opportunity for animal-based foods overall.
    - More likely to: feel good after eating animal meat and dairy, think animal meat and dairy is nutritionally important for a balanced diet, natural to eat and good value for money.
    - Less likely to: be influenced by environment/sustainability or animal welfare when considering animal-based foods.

Values and lifestyle profile
- More likely to prioritise: being financially secure.
- Less likely to prioritise: protecting the environment, protecting animal welfare.

13% | of the UK population

Who are the "Meat & Dairy Reducer" cohort?

Do not intend to increase their consumption of plant-based foods but intend to reduce their consumption of animal meat and dairy

Click here for profiling data tables in the appendix

Demographic profile
- Even gender distribution.
- Skews older (56% are aged 55 or above, 35% are aged 65 or above).
- Mid-low household income (only 17% have an annual household income of £60k or above).

Diet, health and fitness profile
- Self-identified diet: heavy meat eater/omnivore (36%), flexitarian/pescatarian (57%), vegetarian/vegan (7%)
- Strong focus on weight loss / body fat reduction as a health and fitness goal (46%).
- 42% looking to achieve a healthy lifestyle balance (eg, nutrition, sleep, and activity).
- Most likely to be following a low-fat diet (13%).

Notable category capability, opportunity and motivation factors
- Plant-based foods:
  - Lower capability, motivation and opportunity for plant-based foods overall.
  - Less likely to: know lots about the nutritional value of plant-based foods, be confident in preparing plant-based foods, have friends and family who eat plant-based foods, feel good after eating plant-based foods and enjoy the taste of plant-based foods.

- Animal-based meat and dairy:
  - Lower capability, motivation and opportunity for animal-based foods overall.
  - Less likely to: think animal meat and dairy is natural and think animal meat and dairy is good value for money.

Values and lifestyle profile
- More likely to prioritise: animal welfare and protecting the environment.

13% | of the UK population

Who are the "Plant-based Increaser" cohort?

Intend to increase their consumption of plant-based foods but do not intend to reduce their consumption of animal meat and dairy

Click here for profiling data tables in the appendix

Demographic profile
- Predominantly male (62%).
- Skews younger (47% are aged 34 or below).
- More likely to live in London (25%).
- Highest proportion with high household income (34% have an annual household income of £60k or above).
- Highly educated – 48% are educated to university level or above.

Diet, health and fitness profile
- Self-identified diet: heavy meat eater/omnivore (61%), flexitarian/pescatarian (28%), vegetarian/vegan (11%)
- Have the widest range of health and fitness goals. Particularly high for: building muscle, enhancing flexibility and improving mental wellbeing through fitness.
- Most likely to have dietary requirements (39%), especially high protein, high fibre, gluten-free, dairy-free, halal and kosher.

Notable category capability, opportunity and motivations
- Plant-based foods:
  - Highest capability, motivation and opportunity for plant-based foods overall.
  - Most likely to: know lots about the nutritional value of plant-based foods, think plant-based foods are good value for money and natural, choose plant-based out of habit, place importance on eating plant-based for specific health/fitness goals, and have friends/family who eat plant-based.

- Animal-based meat and dairy:
  - Also the highest capability, motivation and opportunity for animal meat and dairy overall.
  - More likely to: place importance on eating animal meat and dairy for specific health/fitness goals, feel good after eating animal meat and dairy, know lots about the nutritional value of animal meat and dairy and think animal meat and dairy are natural.

Values and lifestyle profile
- Most likely to be positive about their finances, work life and physical health.
- More likely to prioritise: being successful, learning new skills and keeping up to date with latest trends.
- Less likely to prioritise: animal welfare and protecting the environment.

20% | of the UK population

Who are the “More Plants, Less Meat” cohort?

Intend to increase their consumption of plant-based foods and intend to reduce their consumption of animal meat and dairy

Click here for profiling data tables in the appendix

Demographic profile
- Skews slightly more female (54%).
- No significant age skews.
- Middle-high income.
- Slightly more likely to be higher educated (36% have a university degree or above).

Diet, health and fitness profile
- Self-identified diet: heavy meat eater/omnivore (29%), flexitarian/pescatarian (64%), vegetarian/vegan (8%)
- Strongest focus on weight loss/body fat reduction as a health and fitness goal (51%).
- 47% looking to achieve a healthy lifestyle balance (eg, nutrition, sleep, and activity).

Notable category capability, opportunity and motivations
- Plant-based foods:
  - Higher capability, motivation and opportunity for plant-based foods overall.
  - More likely to: feel good after eating plant-based foods, enjoy the taste of plant-based, be influenced by environment/sustainability when considering plant-based, and think that plant-based foods are nutritionally important.

- Animal-based meat and dairy:
  - Lower capability, motivation and opportunity for animal meat and dairy overall.
  - Less likely to: feel good after eating animal meat and dairy, place importance on eating animal meat and dairy for specific health and fitness goals, choose animal meat and dairy out of habit and trust the animal meat and dairy industry.

Values and lifestyle profile
- More likely to prioritise: animal welfare, protecting the environment and looking after family.

4. Final Thoughts

Final Thoughts:
Summary

What have we learned?

- **There is widespread appetite for changing what we eat.**
  - 41% of the population report that they already follow meatless diets (9% are vegan, vegetarian or pescatarian) or are actively reducing meat intake (31% are flexitarian).
  - Half (51%) of UK adults intend to further change their diets to consume either less meat and dairy (33%) and/or more plant-based foods (38%), split across three main cohorts:
    - **Meat & Dairy Reducers (13%) –** older people wanting to lose weight.
    - **Plant-Based Increasers (18%) –** younger, higher income people, often men, with a variety of health and fitness goals such as building muscle, seeking protein and fibre.
    - **More Plants, Less Meat & Dairy (20%) –** people looking for a balanced lifestyle, often including weight loss goals.
- **Plant-based eating is widespread and goes far beyond those who eliminate meat entirely from their diets.** 71.5% of the UK's adult population are potential consumers of plant-based food, when adding together those following low- or no-meat diets and meat eaters who consumed a plant-based subcategory in the last year. Although only 2% of respondents say they follow a vegan diet, 44% of adults reported consuming a plant-rich food, such as plant-based meat or a vegetable-based meal, in the last week.
- **Wider consumption of plant-based foods is limited by unfamiliarity, taste and availability.**
  - Only 24% of people have friends or family who eat plant-based foods, vs 86% for animal-based foods.
  - Almost twice as many people enjoy the taste of animal-based meat and dairy (81%) vs plant-based foods (44%).
  - Only around half (45%) of respondents feel confident cooking preparing a plant-based meal vs 83% for animal-based meals.
  - Only half (48%) of respondents felt that the availability of plant-based foods is good compared to 84% for animal-based products.

Final Thoughts: **Recommendations**

Recommendations for the plant-based industry as a whole

- **Normalise:** to drive lasting change, retailers and food producers must promote plant-based foods as a natural part of daily life, that are eaten in relatable, everyday settings and at popular usage occasions. This can be achieved by supporting consumers across each of the three COM-B levers leading to behaviour change – Capability, Opportunity and Motivation.
- **Know-how:** to overcome a lack of familiarity with plant-based foods, the industry can help people gain confidence in choosing plant-based products and preparing delicious plant-based dishes, for example by providing simple recipe suggestions.
- **Nutritional necessity:** the plant-based food industry has a unique opportunity to educate consumers on the nutritional benefits of plant-based foods. By collaborating and using the right platforms, brands can connect with consumers' health priorities and show how plant-based foods and diets support and are essential for a balanced diet.

Recommendations for brands

- **Select your segment:** understand what drives your target audience and makes them feel good, whether it's protein for muscle gain, weight loss, or sustainability. Tailoring product messaging to highlight the attributes that align with their priorities will attract like-minded consumers to the relevant brand.
- **Simple:** to bridge the gap between innovation and familiarity, there is an opportunity to develop new products or position existing products using familiar and recognisable formats, cuisines, ingredients, and packaging formats and designs. To create a seamless consumer experience, ensure that products are simple to prepare and that cooking instructions are easy to follow.
- **Satisfy:** as technology continues to improve, brands must prioritise exceptional taste in the rapidly evolving plant-based market. Brands can use regular consumer feedback and track repeat purchase rates to ensure their products are satisfying, delicious, enjoyable and perceived as high quality.

5. Appendix

Demographic Profile by Consumer Cohorts		No Change For Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Gender	Male	47%	50%	62%	46%
	Female	53%	50%	38%	54%
Age	18-24	6%	4%	14%	6%
	25-34	13%	6%	33%	18%
	35-44	17%	15%	23%	17%
	45-54	16%	19%	15%	19%
	55-64	19%	21%	8%	18%
	65+	28%	35%	6%	22%
Annual Household Income	Under £30k	49%	37%	29%	32%
	£30-60k	33%	44%	36%	42%
	£60k+	12%	17%	34%	24%
Region	East Midlands	8%	7%	5%	6%
	East of England	8%	11%	11%	7%
	London	10%	11%	25%	11%
	North East	5%	3%	3%	4%
	North West	11%	12%	9%	14%
	Northern Ireland	2%	1%	4%	5%
	Scotland	10%	6%	4%	8%
	South East	17%	16%	11%	17%
	South West	8%	7%	7%	9%
	Wales	5%	6%	6%	3%
	West Midlands	8%	12%	10%	8%
	Yorkshire and the Humber	7%	7%	5%	8%
Ethnicity	White	86%	82%	70%	82%
	Asian / Asian British	7%	6%	14%	11%
	Black, Black British, Caribbean or African	2%	5%	8%	4%
	Mixed or Multiple	2%	2%	7%	3%
	Other ethnic group	2%	4%	1%	1%
Highest Education	No formal education	2%	4%	0%	1%
	Secondary School	43%	35%	20%	31%
	Sixth Form / College	18%	16%	21%	16%
	Vocational Training / Apprenticeship	15%	19%	11%	16%
	University Degree	19%	23%	38%	29%
	Postgraduate degree (e.g. Masters, PhD etc.)	3%	3%	10%	7%

Health/fitness/diet Profile by Consumer Cohorts		No Change For Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Personal Health & fitness goals	Lose weight or reduce body fat	37%	46%	30%	51%
	Build muscle or increase strength	15%	15%	30%	21%
	Improve cardiovascular fitness (e.g., running, cycling, swimming)	14%	17%	27%	25%
	Enhance flexibility or mobility (e.g., through yoga or stretching)	11%	13%	22%	18%
	Maintain or achieve a healthy lifestyle balance (e.g., nutrition, sleep, and activity)	28%	42%	43%	47%
	Improve mental well-being through fitness (e.g., stress reduction, mindfulness)	18%	25%	36%	32%
	Train for a specific event or sport (e.g., marathon, triathlon, competition)	3%	3%	13%	2%
	Recover from an injury or improve physical rehabilitation	5%	7%	10%	8%
	None of these	36%	18%	14%	14%
Dietary requirements	Gluten-free / celiac disease	2%	3%	8%	4%
	Dairy-free / lactose intolerant	2%	4%	9%	6%
	Food allergies (e.g. nut, shellfish etc.)	2%	4%	8%	4%
	Low fat	5%	13%	9%	10%
	High protein	4%	4%	18%	9%
	High fibre	3%	5%	12%	8%
	Paleo	0%	2%	2%	0%
	Keto	1%	1%	3%	2%
	Kosher	1%	1%	4%	0%
	Halal	5%	5%	10%	4%
	None of these	83%	74%	61%	71%

Values and lifestyle profile by Consumer Cohorts		No Change For Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
NET positivity (T2B %) about their:	Homelife	44%	45%	43%	42%
	Finances	23%	26%	33%	18%
	Work-life	20%	23%	38%	18%
	Physical health	21%	17%	42%	21%
	Mental health	36%	39%	39%	28%
Most important values (select up to 3)	Protecting the environment	12%	18%	13%	22%
	Keeping fit and healthy	42%	42%	38%	45%
	Protecting animal welfare	13%	20%	10%	16%
	Being financially secure	60%	49%	42%	51%
	Being successful	10%	6%	22%	9%
	Contributing to my community	5%	6%	10%	4%
	Feeling accepted by others	8%	8%	9%	9%
	Having a positive attitude	28%	32%	30%	28%
	Helping others before myself	17%	18%	20%	18%
	Learning new skills	10%	8%	17%	12%
	Maintaining traditional gender roles	7%	3%	8%	2%
	Keeping up to date with the latest trends	3%	2%	9%	1%
	My faith/spirituality	9%	15%	19%	10%
	Looking after my family	62%	57%	42%	66%

Plant-based category capability, opportunity and motivations by Consumer Cohorts			No Change For Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Plant-based COM-B Factors: % stating	Capability	Confident about cooking/preparing a tasty meal with plant-based foods	28%	32%	79%	66%
		Easy for you to judge the quality of plant-based foods	22%	24%	64%	44%
		Think plant-based foods are nutritionally important for a balanced diet	33%	39%	78%	75%
		Know about the nutritional value of plant-based foods	20%	19%	72%	49%
		Agree it is important to eat plant-based foods for a specific health issues or fitness goals	16%	23%	70%	51%
	Opportunity	Good availability of plant-based foods in store/online or in restaurants	38%	37%	72%	61%
		Think plant-based foods are good value for money	16%	20%	66%	41%
		Lots of their friends or family eat/drink plant-based foods	12%	11%	57%	29%
		Regularly see adverts, news or content about plant-based foods	20%	18%	57%	34%
	Motivation	Animal welfare impacts their consideration for plant-based foods	20%	41%	69%	62%
		The environment/sustainability impacts their consideration for plant-based foods	17%	32%	68%	67%
		Trust the plant-based food industry	22%	31%	71%	64%
		Enjoy the taste of eating/drinking plant-based foods	23%	34%	76%	74%
		Regularly choose plant-based foods out of habit, without much thought	12%	16%	63%	40%
		Feel good about themselves after eating/drinking plant-based foods	24%	37%	81%	81%
		Think plant-based foods are natural	26%	38%	72%	47%

Animal meat & dairy category capability, opportunity and motivations by Consumer Cohorts			No Change For Now	Meat & Dairy Reducer	Plant-Based Increaser	More Plants, Less Meat & Dairy
Animal meat & dairy COM-B Factors: % stating	Capability	Confident about cooking/preparing a tasty meal with animal meat & dairy	82%	79%	92%	79%
		Easy for you to judge the quality of animal meat & dairy	65%	55%	77%	59%
		Think animal meat & dairy foods are nutritionally important for a balanced diet	85%	67%	88%	67%
		Know about the nutritional value of animal meat & dairy	56%	46%	79%	60%
		Agree it is important to eat animal meat & dairy for a specific health issues or fitness goals	35%	32%	69%	28%
	Opportunity	Good availability of animal meat & dairy in store/online or in restaurants	84%	74%	90%	83%
		Think animal meat & dairy are good value for money	62%	45%	73%	45%
		Lots of their friends or family eat/drink animal meat & dairy	87%	78%	92%	86%
		Regularly see adverts, news or content about animal meat & dairy	35%	35%	64%	46%
	Motivation	Animal welfare impacts their consideration for animal meat & dairy	38%	52%	71%	63%
		The environment/sustainability impacts their consideration for animal meat & dairy	27%	34%	61%	59%
		Trust the animal meat & dairy industry	57%	41%	69%	40%
		Enjoy the taste of eating/drinking animal meat & dairy	84%	67%	89%	75%
		Regularly choose animal meat & dairy out of habit, without much thought	68%	50%	81%	50%
		Feel good about themselves after eating/drinking animal meat & dairy	71%	49%	81%	40%
		Think animal meat & dairy foods are natural	55%	33%	67%	39%

Reasons for reducing animal-based category consumption over the last 12 months (coded verbatim)

Among UK adults who reduced their consumption of animal-based foods within the last 12 months

Themes	Verbatims (examples)
Cost	“It is too expensive”
	“Because it’s too expensive and I can’t afford it”
Health	“Trying to get healthier. Cutting down on red meat, processed meat and butter”
	“I think it is better for my overall health if i limit these items”
	“I have made a conscious effort to eat more healthily”
Taste preferences	“I recently started to not like the taste of milk and I started taking my coffee without milk most of the time”
	“Not enjoying it as much”
	“Just don't fancy them as much.”
Medical conditions	“My cholesterol is a bit high so I am trying to cut back on red meat and replace it with plant based alternatives.”
	“I am lactose intolerant and been switching over to oat milk”
	“Having problems digesting red meat”
Environmental concerns	“I have been trying meat alternatives to help the environment”
	“To try to lead a more sustainable lifestyle with less animal products”
	“Trying to reduce consumption in order to protect environment”
No specific reason	“No particular reason, it has just turned out that way”
	“Just eating less, no real reason”
Weight management	“If I am trying to lose weight then I eat less red meat and more fish and vegetarian dishes.”
	“Just trying to cut down on meat consumption overall and reduce intake for weight loss”
	“I have been dieting and cutting back on calories”
Ethical concerns	“The adverse effects of rearing animals on the scale that we have is too much. I need to play my part.”
	“I don’t like the idea of animals being killed.”
	“To help save animals”
Availability	“I’m flexitarian and couldn’t find quality meat lately”
	“Less available in store I shop at”
Lifestyle Changes	“Just wanted to do a slight diet change”
	“I'm trying to cut down on meat and diary products”