

Public attitudes survey 2024

Animal Welfare.
Worldwide.



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Executive summary

The public want to reduce meat consumption, but action is stalling

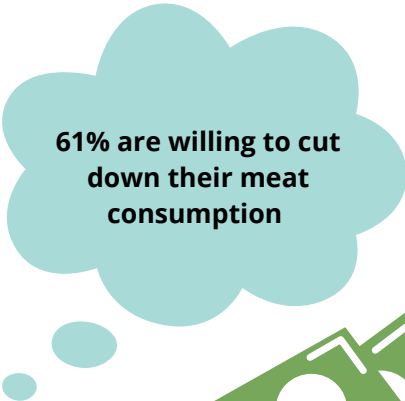
Awareness of the issues surrounding meat production and consumption is high, as is the willingness to reduce meat intake. Despite this awareness, slow progress is being made on reducing meat consumption. Overall, people want a food system that is good for the environment and animals, but governments across the UK are letting them down. We need a cohesive, joined up food and farming strategy that delivers for animals, people and the planet. Organisations working in the sector can support this by transferring their focus from 'why', to the 'how'.

Despite wanting to, the majority can't access 'better' meat and dairy products

Household food insecurity is high, meaning people are unable to afford their typical shop. In accordance with this, the major barrier to buying 'better' meat and dairy is the price. Finding ways to mainstream 'less and better' is key, taking the burden off the individual by changing the system. One means of achieving this is through improved public procurement, a commitment made by Labour during their election manifesto to half of all food purchased across the public sector to be locally produced or 'certified to higher environmental standards'. People agree that the public sector can create a market for 'better' meat and dairy through revised menus in schools and hospitals.

The public supports our farmers, and believe restoring nature and food production go hand in hand


Farmers in the UK continue to yield strong support from the British public, particularly those who use 'better' farming practices. Voters are calling on the government to implement farming policy which provides for both nature and food security, and advocate high standards in trade policy.



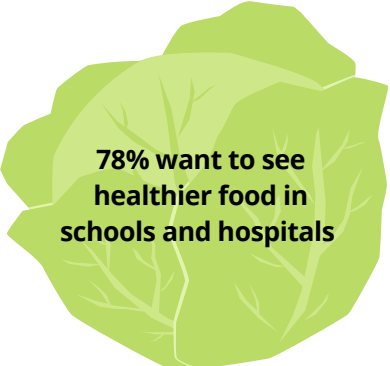
61% are willing to cut down their meat consumption



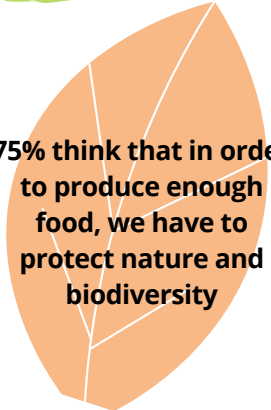
24% have cut down their meat consumption in the past year



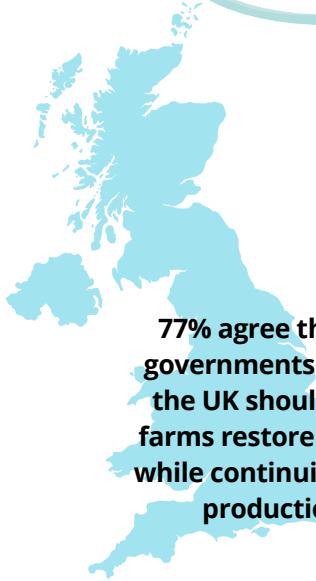
67% of the respondents stated meat produced to higher standards, e.g. free range or organic, was too expensive for them to buy regularly



78% want to see healthier food in schools and hospitals



75% think that in order to produce enough food, we have to protect nature and biodiversity



77% agree that all governments across the UK should help farms restore nature while continuing food production

Introduction

Every year Eating Better conducts a Public attitude survey to measure changing attitudes around food options, with a particular focus on meat and dairy consumption. As an alliance of organisations who advocate for healthy, sustainable and fair food systems, understanding public opinion is important for three main reasons:

Opinions drive behaviour

This survey provides valuable insights into the current trends and sentiments driving citizen behaviour. By examining public attitudes towards meat and dairy consumption, we can identify areas of opportunity and potential blockers to more people taking up sustainable and ethical food options.

Benchmarking our efforts

Public opinion serves as a critical benchmark for evaluating the effectiveness of advocacy efforts aimed at enabling 'Less and Better' meat and dairy consumption. By gauging the impact of our collective initiatives on shifting public attitudes, we can refine our strategies and maximise our impact.

Opinions influence policy

Public opinion informs policy and decision-making processes at both local and national levels. By presenting robust data on public attitudes towards food, we can advocate for evidence-based policies that support the transition towards more sustainable and equitable food systems. With a new UK Government, there is a new and clear opportunity to reform our food system if policy is ambitious.

In this report, we present the findings of the Eating Better x FOUR PAWS UK 2024 Public attitudes survey, offering insights and analysis that will inform our collective efforts to create a healthier, more sustainable, and more just food system for all.



The way in which we farm animals urgently needs to change, not just to protect their welfare, but also to protect the planet and our own health and wellbeing.

By ending factory farming and transitioning towards more sustainable and ethical food and farming systems, we can create a future where farmers are rewarded for prioritising animal welfare, producing nutritious food, tackling climate change and restoring nature.



Emily Wilson

Head of Programmes and Campaigns
FOUR PAWS UK



An overview of 'less and better'

Awareness

The public are aware of the need for change

Over the past decade, the focus of the Eating Better alliance has been to empower the public, policy makers and industry with the knowledge they need to make a shift towards healthy and sustainable diets. As a result, the public are becoming increasingly aware of the impact of meat production and consumption:

41%

Agree with the statement:
"Producing and consuming
meat/livestock products has a
significant negative impact on
the environment"

45%

Think their health would
benefit from a reduction in
meat

45%

Are influenced by animal
welfare when deciding what
meat products to buy

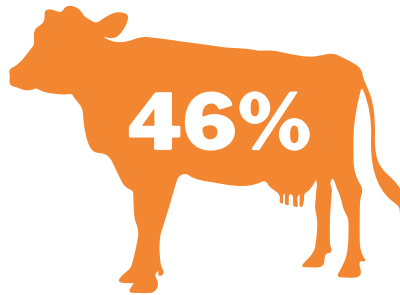
Since 2013, there has been a 32% increase in the amount of people who agree that producing and consuming livestock can have a negative impact on the environment, increasing from 31% in 2013 to 41% in 2024.



An overview of 'less and better'



Welfare, carbon emissions, and money are the top three motivators behind reducing meat consumption.



Listed animal welfare as a top 3 motivator



Listed reducing carbon emissions as a top 3 motivator



Listed money saving as a top 3 motivator

Deep dive

Voters support improvements to animal welfare

Voter support for improving animal welfare is high; across the 5 major political parties of the UK¹ animal welfare was consistently the most popular motivator behind reducing meat consumption. Recent polling showed that over two thirds of the British public believe that if a political party were to announce plans to pass laws improving animal welfare it would have the right priorities.² Despite this strong public sentiment, action on animal welfare often suffers at the hand of weak promises and diluted action in policy. Since the Animal Welfare (Kept Animals) Bill was dropped in 2023, we have entered a period of policy inertia in which animal welfare has been continually deprioritised.

Next steps:

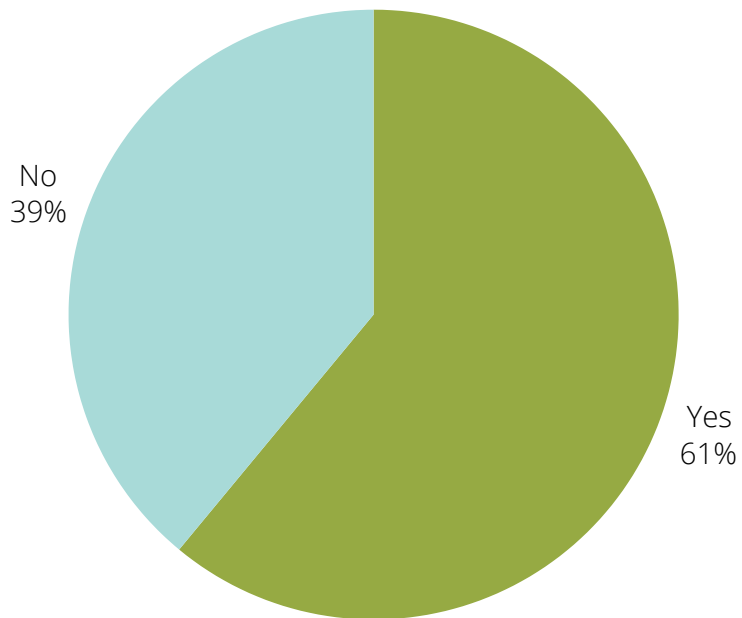
[Animals Matter](#) sets out a series of key policies that the next UK Government must introduce in order to improve animal protection laws, as our polling shows the public supports. Such policies would not only help to improve the welfare of all farmed animals, but would shift British farming away from an industrial model of agriculture towards nature friendly farming practices.

An overview of 'less and better'

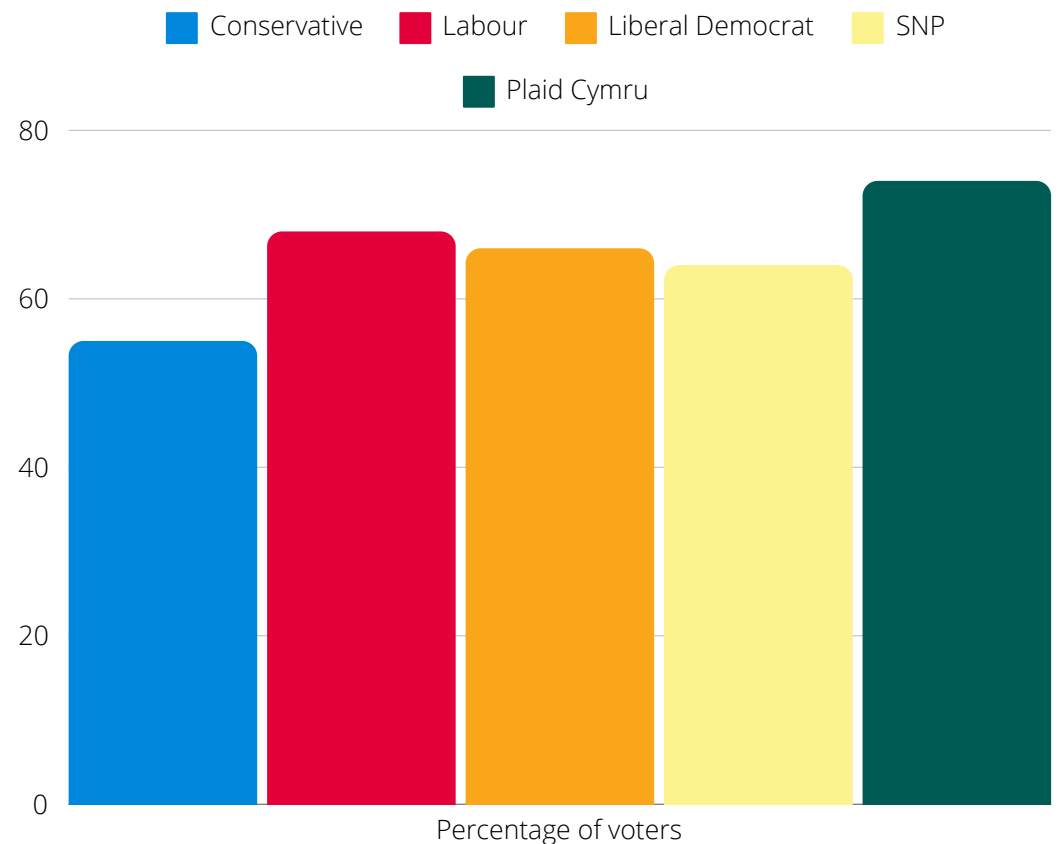


Almost two thirds are willing to cut down their meat consumption

Possibly as a result of increasing awareness around the environmental and ethical concerns associated with livestock production and consumption, the UK public is becoming more willing to reduce their meat consumption. This is a testament to the work of those who have been campaigning for change over the past decade.



Interestingly, a significantly higher number of Labour and Plaid Cymru voters were found to be willing to reduce their meat intake than Conservative:



An overview of 'less and better'

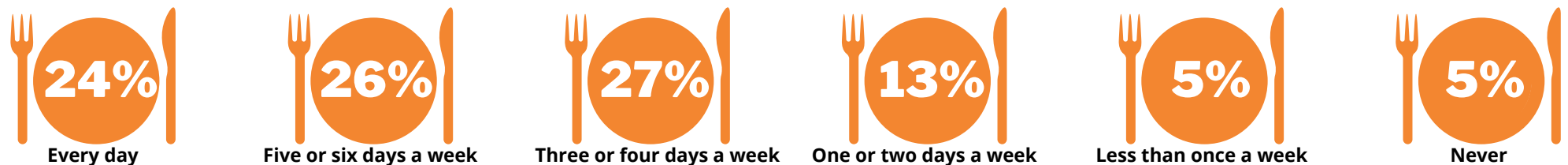


Almost a quarter (24%) claim to be eating less meat than they were a year ago

The amount of people eating less meat than they did a year ago has increased by 26% from 2017 (19%) to 2024 (24%). While this is an encouraging shift, the vast majority still report unchanged eating habits, with 64% eating the same amount. Given that two thirds are open to reducing their meat consumption, there is a clear disconnect between intention and action. The rise in those eating less does suggest a positive trend.

Interestingly, more women have reduced their meat intake compared to men; 27% of women have started eating less meat in the last year, compared to 21% of men.

40% of people follow a flexitarian diet, eating meat 1- 4 times a week



Over the past 10 years, our polling has shown a consistent decrease in the number of people eating meat every day, with a shift towards flexitarian diets where people consume meat 1-4 times a week. Since 2017 the most popular response to 'how often do you eat meat' has lowered from 'everyday' (26%), to 5-6 times a week in 2019 (27%), to 3-4 times a week in 2020 (29%). This year, 3-4 times a week remains the most popular answer.

Despite this, the data suggests more people are choosing to eat meat everyday. In fact, the amount of people eating meat at least 5 times a week has increased from 43% in 2022 to 50% in 2024. Further exploration and assessment are needed to determine if this represents a temporary change or a reversal of the trend. It may reflect a polarisation between those eating less and those eating more.

This data on the frequency of meat consumption does not reflect that 24% report to be eating less meat. As such, it is possible that people are reducing their meat consumption through smaller portion sizes, rather than reducing how often they consume meat. Further investigation is needed to explore these dynamics.

An overview of 'less and better'



Younger people understand the consequences of meat production and consumption, but are not shifting their eating habits

Despite 46% of 18-24 year olds agreeing that livestock production and consumption can cause environmental harm, this age group contains the lowest number who have reduced their meat consumption in the past year (16%), the highest proportion of people who have increased their meat consumption (19%), and the highest proportion of people who eat meat everyday at 40%. Of this age group, just 7% eat meat less than once a week or never.

Deep dive

Mobilising young voices

The disconnect between understanding and action in 18-24 year olds demonstrates that beliefs do not necessarily translate into action. In line with the high levels of environmental awareness of this age bracket, we found that 60% of 18-24 year olds are willing to reduce their meat consumption. This highlights that while recognising the link between environmental harm and meat consumption is a foundational step in encouraging younger generations to embrace meat reduction,³ it does not necessarily enable it.

Next steps:

In order to mobilise action in younger generations, the blockers which are curtailing action must be dissolved. While general barriers to 'less and better'⁴ stand true for 18-24 year olds, this age group has been found to be disproportionately affected by specific narratives around reducing meat consumption:

Health concerns: Young adults are affected by misinformation and fear around the perceived lack of protein in a plant based diet.⁵ This has been found particularly true in young men.⁶

Barrier

Better education on the health benefits which can be achieved through a reduced meat diet can work to dissolve this barrier.⁷ In practice, this would mean incorporating sustainability goals and the benefits of plant-based protein into the school curriculum and the [Eatwell Guide](#). Additionally, healthcare professionals and policy makers should be encouraged to effectively communicate the positive health outcomes of reducing meat intake.

Solution

Deep dive (Continued)

Low familiarity: lack of convenience and high cost: young adults describe low familiarity and perceived difficulty in preparing plant-based meals⁸ as a barrier, often citing that ready-made or convenience plant based foods are too expensive.⁹

Barrier

While education and increasing access to affordable fresh ingredients would work to alleviate these barriers,¹⁰ utilising levers which lessen the financial burden would further improve uptake. One example would be increasing the availability of plant-based foods in public cafeterias or university eateries.¹¹

Solution

Restriction and lack of enjoyment: Plant based diets are often perceived as reducing the food options available to young adults, while the options that are available are believed to be less appealing.¹²

Barrier

Those advocating for meat reductions should avoid framing change as people losing out.¹³ Additionally, communications should focus on the possible variety, tastes, and convenience of cooking plant based meals.¹⁴

Solution

Peer pressure: Young adults have been found to be disproportionately affected by the opinions of others, using the ambition for social acceptance as a blocker to behaving in line with their beliefs.¹⁵

Barrier

As a direct inverse to the barrier, peer influence, particularly among university students, has been found to significantly impact dietary choices in favour of plant-based diets.¹⁶ Social modelling, where individuals adjust their diets to match those of their peers, positively impacts dietary choices, potentially fostering the acceptance of plant-based diets.^{17 18} Focusing on interventions such as those used by SOS UK is a strong way to approach this topic. Additionally, exposure to plant-based diets through social media channels has been found to increase acceptance and adoption among young people, as demonstrated by research linking increased exposure to food content with a greater likelihood of following such diets.^{19 20} Campaigns such as 'Find you ooh' by Hubbub, exemplifying this in action.

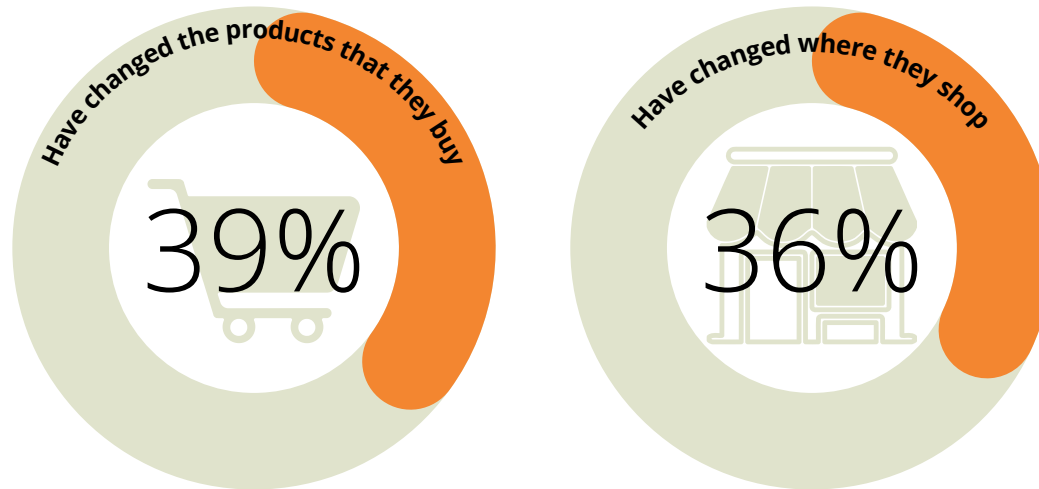
Solution

Blockers to 'less and better'

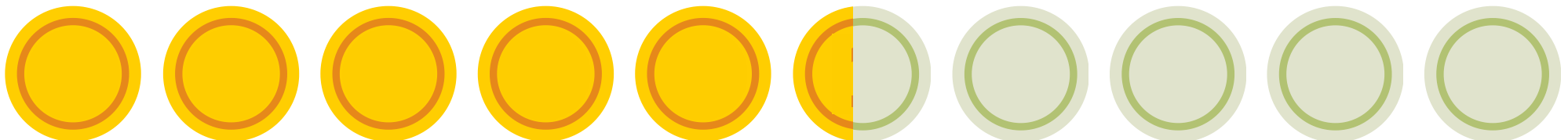


A member of 1 in 5 households in the UK has had to skip a meal within the past year because they couldn't afford food.

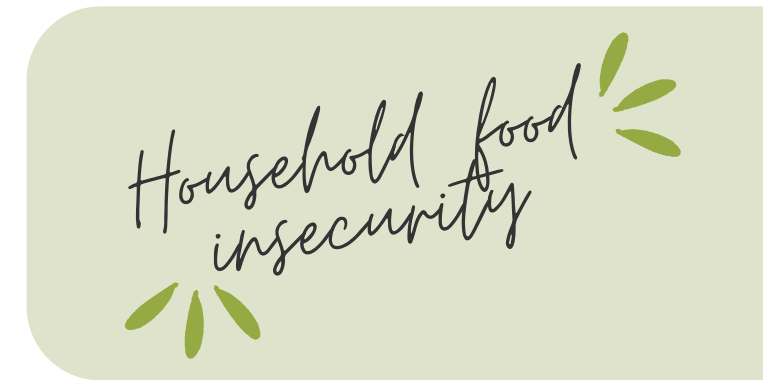
In recent years, food price inflation in the UK has been among the highest of all G7 nations, peaking in 2023 at levels not seen in four decades. Our survey found that in the past year, 40% of people have struggled to afford their weekly food shop. Because of this...



Younger age groups have been affected most by the high costs of living, with 54% reporting to have struggled to afford their typical food shop this past year, compared to 27% of over 55s.



Blockers to 'less and better'



People are changing their food shopping habits to save money

79% reported that they would willingly opt to change their shopping habits in order to save money in their food shop.

Deep dive

Food environments

Income level and financial security have a significant impact on eating behaviour.²¹ A Food Foundation [survey](#) conducted in January 2024 found that over half of food-insecure households reported buying less fruit, and 44% reported purchasing fewer vegetables. The cost of living crisis has led to the [lowest vegetable purchases](#) in the UK in 50 years, reflecting the reality that healthier foods are [more than twice as expensive](#) per calorie as less healthy options. 41% of our respondents cited that they would consider reducing their meat intake to save money. However, plant-based meat and dairy alternatives currently come with a [price premium](#). The current environment of high food costs, cheaper unhealthy options, and expensive plant based substitutes is not conducive to long-term dietary changes.

In response to this, there are [calls](#) for retailers to fulfil their duty in supporting families during the cost of living crisis by creating an enabling environment for change.

Action to get us there



Retail



Encourage sales of plant-based foods



Set targets for more plant-based foods in the basket and evaluate progress



Embed a sustainable diets strategy across the business

Blockers to 'less and better'

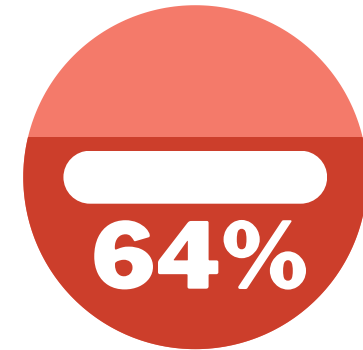
'Better' meat and dairy are inaccessible to almost two thirds of the UK public

When we do consume meat, embracing higher welfare options, such as organic or pasture-raised meat, should ideally become the standard practice. Yet, these alternatives are often associated with beliefs or obstacles that alienate a significant portion of the UK population, rendering the notion of "less and better" inaccessible to many. Interestingly, significantly more 35-54 year olds (70%) face these barriers than both 18-34 year olds (59%) and over 55s (63%).

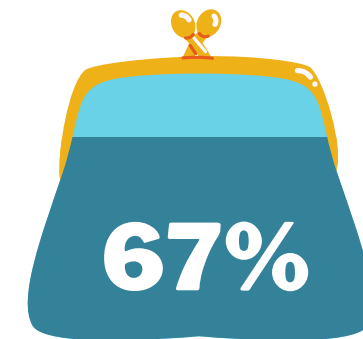
Price is the main barrier to buying 'better'

Two-thirds (67%) of respondents stated that meat produced to higher standards was too expensive for them to buy regularly. This underscores the importance of pairing 'less' with 'better'. Reducing meat consumption and substituting lower-quality meat with affordable plant-based alternatives like beans and pulses can save money, making it easier to afford better meat.

Despite the organic sector experiencing growth in 2023, sales of organic fresh produce declined in supermarkets. As retailers price-match conventional products against the UK's least expensive supermarkets, organic items are perceived to come at an inflated, and according to our data, unaffordable cost. Ideally, farmgate prices for organic, and 'better', products should reflect their high environmental and animal welfare standards with a modest price premium. However, data suggests a significant discrepancy between these farmgate premiums and the prices charged by supermarkets, with some retailers imposing excessively high markups. There is an opportunity for retailers in the UK to reduce the relative premiums of organic and 'better' meat and dairy, unlocking growth for the sector and increasing accessibility.



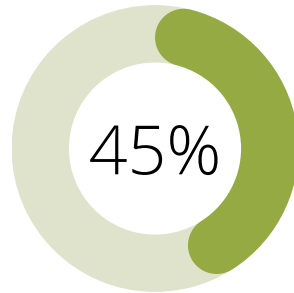
64% of our respondents reported there are barriers which stop them buying 'better' meat



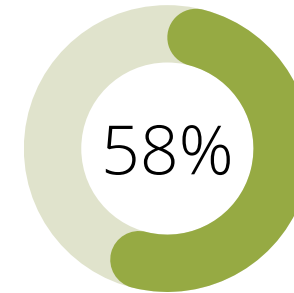
Two-thirds (67%) of respondents stated that meat produced to higher standards was too expensive for them to buy regularly

Blockers to 'less and better'

People would like more choice and better labelling



45% stated that they'd like more choice when it comes to higher welfare products



58% stated they'd be more likely to buy meat that's been produced to higher welfare standards if it was clearly labelled so

Action to get us there

Government



Local authorities improve access to fruit and vegetables



Make vegetables and better meat affordable



Retail



Develop a sourcing policy that delivers 'better'



Label origin and method of production for all meat and dairy

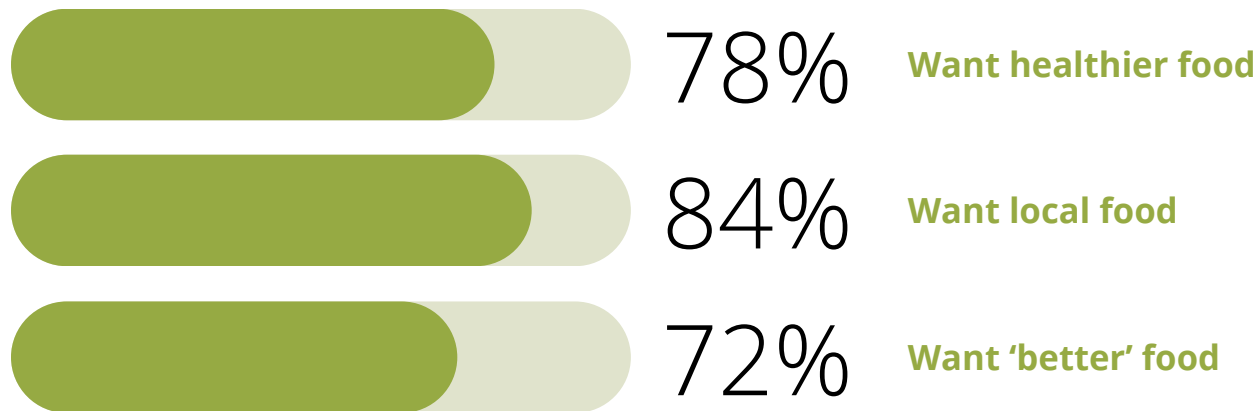
Enablers of action



There is strong support for healthy and sustainable public procurement

Public procurement can address various challenges within food systems, from supporting our farmers to getting more plants on plates. The UK public recognises and supports the potential of leveraging public procurement to achieve these goals.

In our schools and hospitals:



65% agreed that ingredients known to cause health problems, such as processed meat, should not be served in schools and hospitals. With a need to reduce our consumption of meat, focusing on a type of meat we know is linked to health risks is a great place to start. Eating Better's Processed meat report asks public sector caterers to reduce the amount of processed meat on menus, and this survey now confirms the public back this call. Public procurement is a clear focus of the new UK Government and this evidence shows that they will have public support for action in this area.

Enablers of action

Utilising public procurement

Our survey found that 73% of the public want to do more to support our farmers. Produce procured from UK farms, namely those using 'better' practices, is a way of improving access to fresh and nutritious ingredients without the individual incurring the cost. The public are in favour of this idea;



84% think that sourcing UK grown food for schools and hospitals is a good way to support our farmers.



Action to get us there



Government



Normalise sustainable diets through public procurement



Mainstream progress in school food

Enablers of action

Three quarters of people believe that we must protect and restore nature in order to produce enough food

In order to maintain long term food production nature needs to thrive, and our future food and farming systems can be a part of the solution. Switching to farming systems that work in harmony with nature has the capacity to rebuild the environmental damage caused by how we've managed our land over the last 100 years, restoring the wildlife which once coexisted with food production and, crucially, providing a sustainable and secure income for farmers. Our survey shows that the UK public supports this ambition. People agree that having a sustainable diet will help achieve food security.

62% believe that following a sustainable diet will help achieve food security

Implementing 'better' farming methods across the UK has the potential to address climate, nature, and public health concerns while ensuring sufficient food production. With a shift to less and better, combined with efforts to minimise food waste, it's possible to maintain or even enhance current levels of self-sufficiency. Narratives which pit food production against nature restoration are damaging, and not backed by the majority of the UK public. There is strong support for the role policy can play, with **77% agreeing that governments across the UK should help farms restore nature while continuing food production.**



Action to get us there

Government



Rebalance agricultural policy towards better meat and dairy and plant production



Sustainable and healthy dietary guidelines underpin all policy development



Producers



Harness opportunities for more plant production



Switch to better meat and dairy production



Harness the profitability of environmental services

Enablers of action



Support is high for farmers in the UK

The current food system is not working for people, farmers, or the planet. From unfair pay to insufficient policy, the demands placed on the shoulders of producers are causing significant discomfort within the farming community. The UK public are overwhelmingly in favour of better support for our farmers, with 85% agreeing that farmers are important for keeping our country going.

To address the challenges faced by the farming sector, we need urgent, systemic and structural change. The case for change must be solution focussed, working to secure fair and transparent supply chains with fair pay for farmers, while offering the support and funding needed to transition to 'better' practices. Commitments by Labour in their manifesto include making environmental land management schemes 'work for farmers and nature' and to introduce a land use strategy, which are welcome steps in the right direction. The UK public support this mission:

73%

would like to do more to support UK farmers that have high animal welfare and environmental standards



82%

believe that UK farmers should receive a fair share of the price we pay for meat and dairy in shops, cafes and restaurants



Enablers of action



The UK public is heavily in favour of high trade standards for meat and dairy

The UK public is resolute in its backing of high trade standards for meat and dairy. While close to half (49%) are open to imports, they call for quality that mirrors domestic standards. Awareness of the broader implications of trade policy is widespread, with 71% of individuals agreeing that it is imperative for the government to evaluate future trade agreements for their impact on both human health and the environment.

Meanwhile, 31% firmly advocate for a 'homegrown-first' approach, backing a halt to meat and dairy imports irrespective of the costs this may incur. This underscores a strong taste for locally sourced produce, indicating the need for policies that ensure such goods meet rigorous standards of quality and welfare.



Making it happen

Action is needed to stimulate an enabling environment to drive the necessary transformation in eating habits. The Better by Half Roadmap lays out these action areas:



- Deliver a cross-departmental food and farming strategy
- Sustainable and healthy dietary guidelines underpin all policy development
- Normalise sustainable diets through public procurement
- Mainstream progress in school food
- Rebalance agricultural policy towards better meat and dairy and plant production
- Develop an integrated land-use plan
- Local authorities improve access to fruit and vegetables
- Make vegetables and better fruit more affordable
- Assess future trade deals for their impact on human health and the environment
- Develop and implement a strategy to facilitate a just transition for agriculture



- Harness opportunities for more plant production
- Switch to better meat and dairy production
- Harness the profitability of environmental services



- Put more plants on plates and menus
- Make plant dishes appealing
- Set targets for more plants and less and better meat and evaluate progress
- Provide exciting plant-based training and development for chefs
- Develop a sourcing policy that delivers 'better'



- Label origin and method of production for all meat and dairy
- Encourage sales of plant foods
- Set targets for more plants in the basket and evaluate progress
- Embed a sustainable diets strategy across the business
- Develop a sourcing policy that delivers 'better'



- Evaluate risks and opportunities of companies in meat and dairy production and sales
- Engage to promote healthy and sustainable production

Policy recommendations

With the Chancellor of the Exchequer stating that the UK's public finances are in the worst state since 1945, identifying crosscutting policy areas will be key to getting maximum benefit from public spend. Food policy represents one of the few genuinely transformative, cross-cutting, policy agendas available to a new government. In order to deliver the actions outlined by the Better by Half roadmap, the UK Government should concentrate on the following areas as a matter of priority:



A food plan

The UK Government should, at the earliest opportunity, introduce a new Food Bill which implements the recommendations put forward in the National Food Strategy. Devolved governments across the UK should develop or continue advancing their own food plans in line with these recommendations and the specific needs of each nation. The food plans should set a target for meat and dairy reduction and enable better production of meat and dairy. As evidenced in Eating Better's *Better by Half Roadmap*, this is a key mechanism for joining up Government policy on food security, farming, public health, net zero, biodiversity and land-use.



Procurement

Reforming public procurement could deliver multiple benefits across the food supply chain and public health. Encouragingly in their manifesto, Labour committed to half of all food purchased across the public sector to be locally produced or 'certified to higher environmental standards'.

The UK Government should redesign the Government Buying Standards for Food (GBSF) to ensure that taxpayer money is spent on food that is both healthy and sustainable. The updated procurement standards should be legally-binding to ensure they are followed, and include a commitment to reduce the amount of livestock products sourced and served in the public sector. It should also commit to introducing minimum standards for sustainability and animal welfare for animal-sourced foods e.g. organic, pasture-fed or certified sustainable fish. Where appropriate, equal measures should be adopted by devolved governments.



Agricultural budget

Without the support to transition, nature and animal-friendly farming will not become the mainstream in the UK. We call for an increase in the UK Government agricultural budget (and devolved budgets) for the new Parliamentary term.

Funding should be directed towards farmers in, or transitioning to, just climate-resilient farming systems, including producing more vegetables, pulses and legumes, more small-scale and new entrant farming enterprises, the infrastructure needed for a more localised food system, and providing advice and support for all farmers.

Acknowledgements

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Thank you to:

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Kayleigh Russell - Social Media Lead, FOUR PAWS UK

Andrew Stark - Senior Research and Policy Manager, Eating Better



Appendix

Methods

Online Omnibus. All figures unless stated otherwise were collected and supplied by Savanta.

Total sample size was 1700 adults (N= 500 England, Scotland and Wales, N= 200 Northern Ireland).

Fieldwork was undertaken between 27th March-4th April 2024.

Political party affiliation was determined based on voting intentions at the time the data was collected for the 2024 General Election.



1. Conservatives, Labour, Liberal Democrats, SNP, Plaid Cymru
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