Eating Better YouGov Survey quick analysis – April 2019

Top-line insights

Awareness of livestock's environmental impacts is growing.
38% of sample aware, compared to 31% in 2017. Awareness is highest among 18-24 year olds (49%), left-wing/centre-left voters (55% Lib Dem; 48% Labour), 'remain' voters (51%), and those from a higher socio-economic background (44% ABC1). Regionally, awareness is greatest in London (50%) and Scotland (43%).

Young people are talking the talk when it comes to eating healthily and sustainably, but aren't walking the walk. 65+ leading the way despite lower levels of awareness.
Despite being the group with the highest awareness (49% aware of environmental impact of meat production) and greatest intention to moderate their meat consumption for climate reasons (38%), 33% of 18-24 year olds are still eating meat daily. This is compared to just 15% of over-65s, despite this age group having the lowest awareness about the environmental impacts of meat production (32%).

30% of 50-64 year olds, and 26% of over-65s report eating less meat than this time last year, compared to just 16% of 18-24 year olds. In fact, 8% of 18-24 year olds report eating more meat now than a year ago – the group with the highest growth in this area.

Animal welfare remains the principal driver of reducing meat consumption (38%), but climate impact is becoming increasingly important.
Meat's carbon footprint (29%) has now overtaken health (24%), and it is the only driver we analysed which has seen more people choosing since 2017.

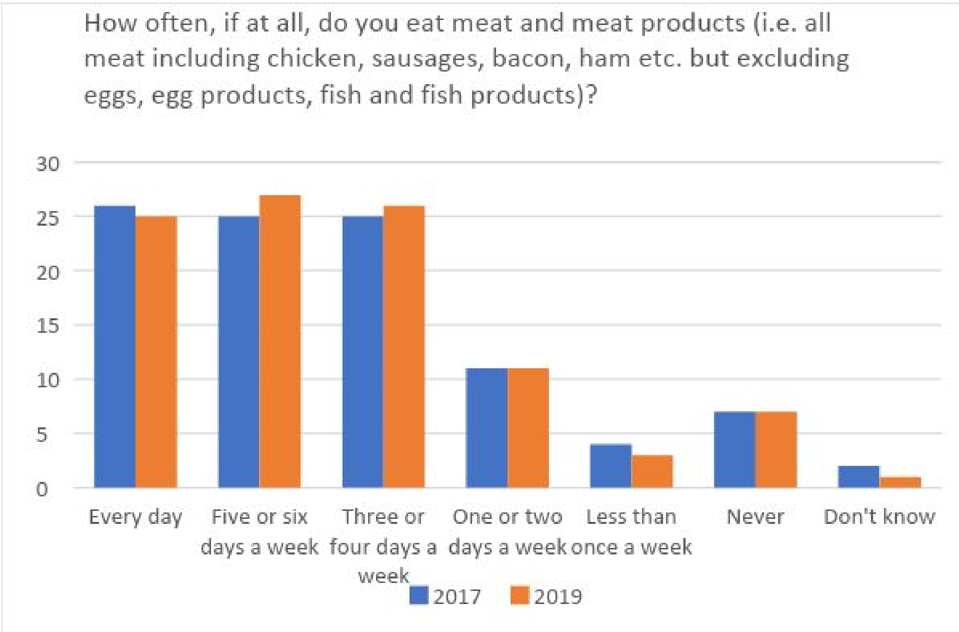
Food is a deeply social issue, with evident socio-political divides when it comes to meat consumption and the environmental impact of the food we eat.
51% of 'remain' voters in the 2016 EU referendum are aware of environmental impacts of meat production, compared to just 26% of 'leave' voters.

This trend continues across drivers of meat consumption, with 42% of 'remainers' driven to moderate their meat consumption by their concern for the carbon footprint of meat production, compared to just 19% of 'leavers'.

Natural beats processed for all audiences.
Natural unprocessed products are by far the most popular for proteins eaten in the last month (52% pulses; 45% nuts and seeds). Meat alternatives are less popular (26%). These results largely hold across socio-economic backgrounds and ages, although there's a regional difference – fewer nuts and seeds are consumed in the North of England and Scotland (38%) than in London (52%).

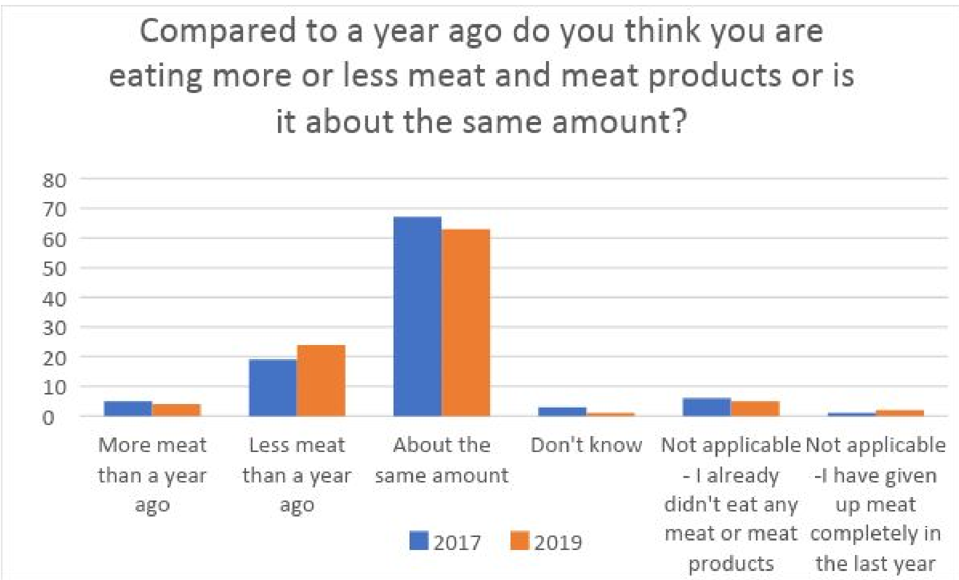
Survey results overview

Regularity of meat eating



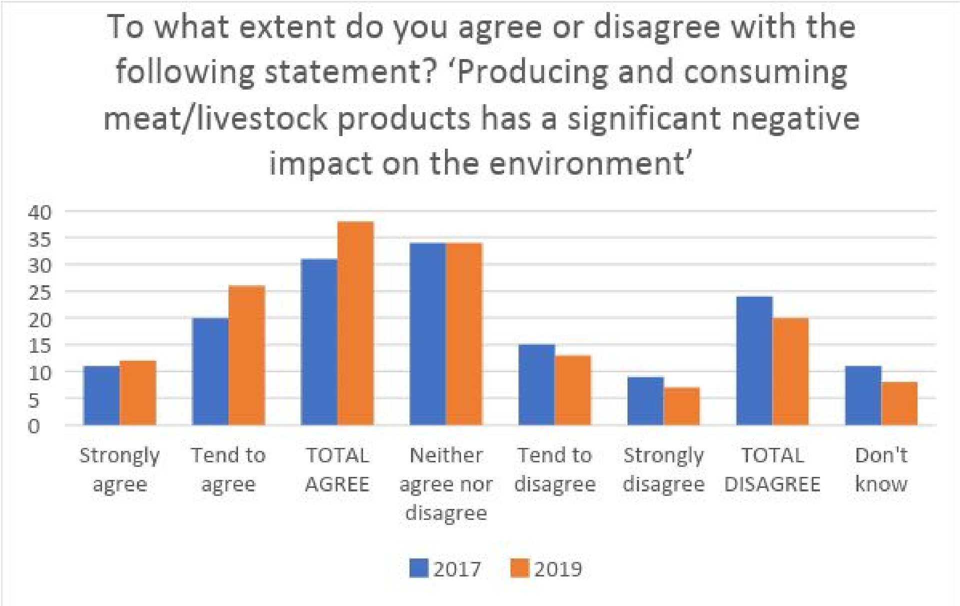
- There is very little change year on year. A very slight fall in the percentage of people eating meat every day (1%) and a slight increase in people eating it five or six days a week and three or four days a week.
- Interestingly the youngest group (18-24 yos) are most likely to eat meat every day. This is counter to what we are regularly told, that change is coming from younger people.

Change in meat consumption over time



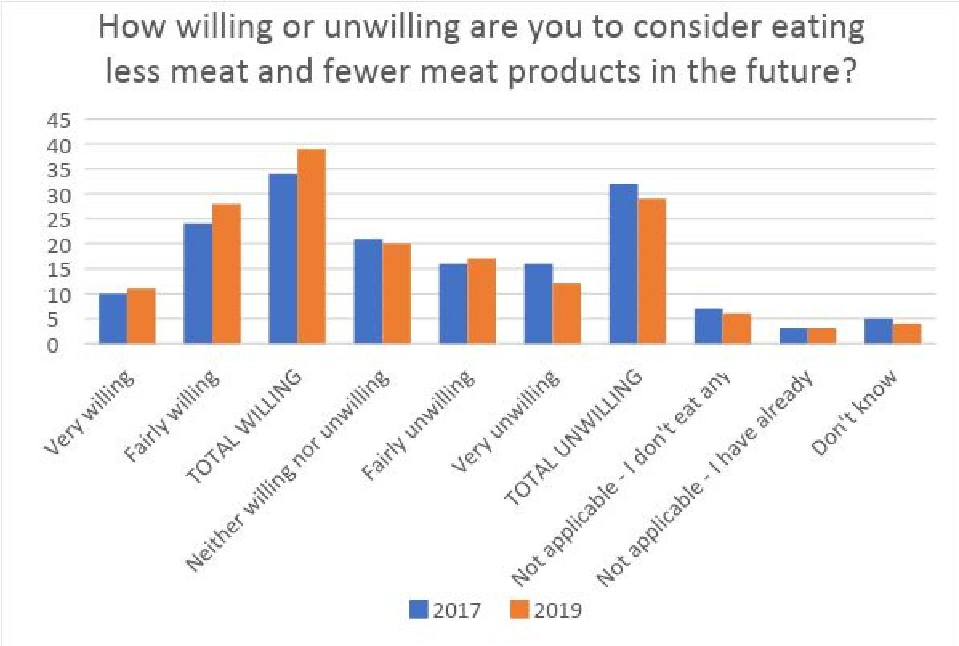
* Most people think they are eating ‘about the same amount of meat’ as a year ago.
* More people think they are eating ‘less meat than a year ago’ than think they are eating ‘more meat than a year ago.’
* Again the 18-24 year old age group are the most likely age group to be eating ‘more meat than a year ago,’ and the least likely age group to be eating ‘less meat than a year ago.’

Understanding of meat consumption and its impact on environment



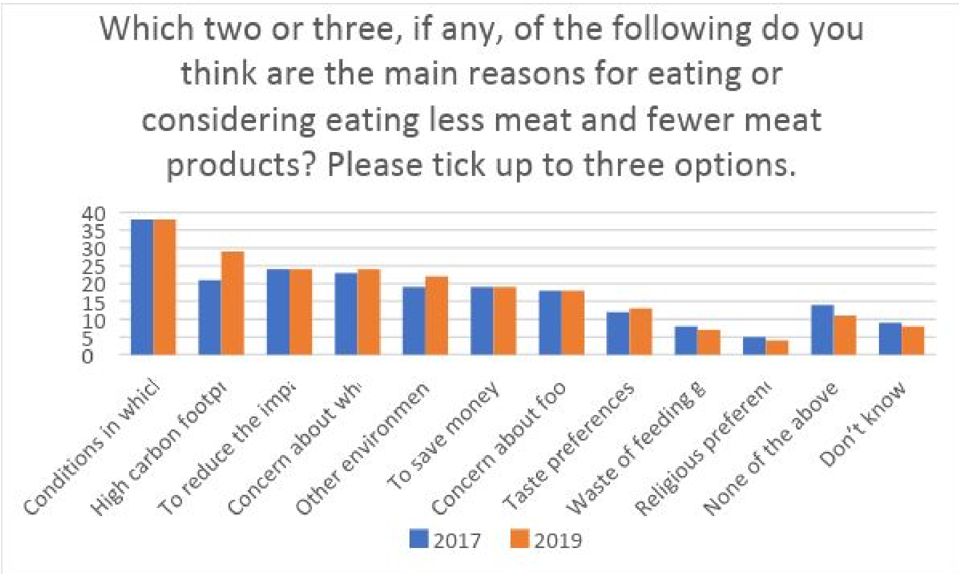
* There is increased agreement that ‘Producing and consuming meat/livestock products has a significant negative impact on the environment’ (38% agree).
* There is a split between Labour (48% agree) and Lib Dem (52% agree) voters who are more likely to agree with this statement than Conservative voters (27% agree).
* Likewise there’s a split between those who voted to ‘remain’ in the 2016 EU Referendum (51% agree), and those who voted to ‘leave’ (26%).
* The younger the age group the more likely that they agree.

Willingness to reduce meat consumption



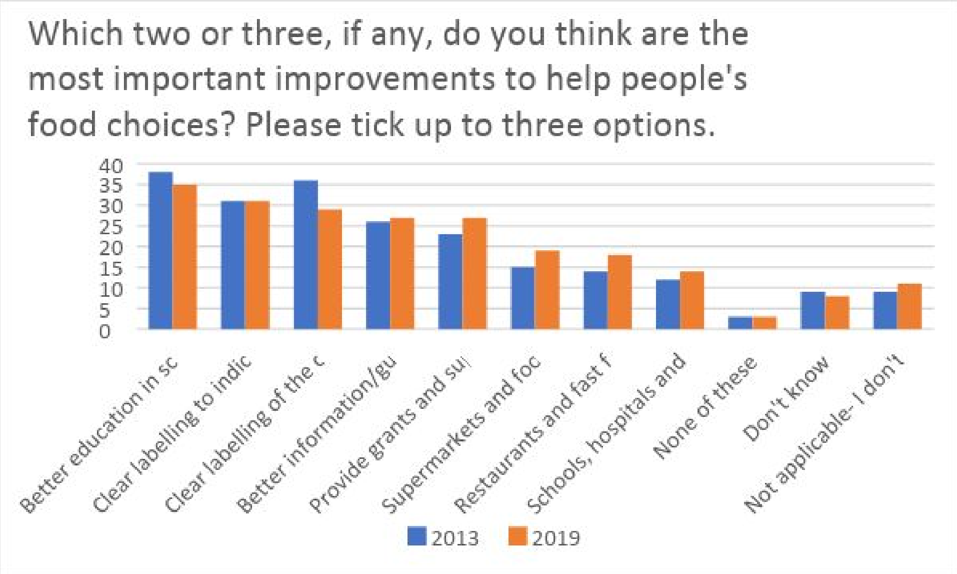
- More people are willing to consider eating less meat and fewer meat products in the future than are unwilling and this gap is growing.
- Females are more likely to be willing to change their consumption.
- There is significant alignment between awareness of meat's environmental impacts and willingness to moderate meat consumption.
- As with all of the questions there is a demographic split, with groups ABC1 being more open to change than C2DE, perhaps understandably as they are more likely to have the means to make changes, as they are more likely to be affluent and have a higher level of education.

Understanding of reasons for reducing meat consumption



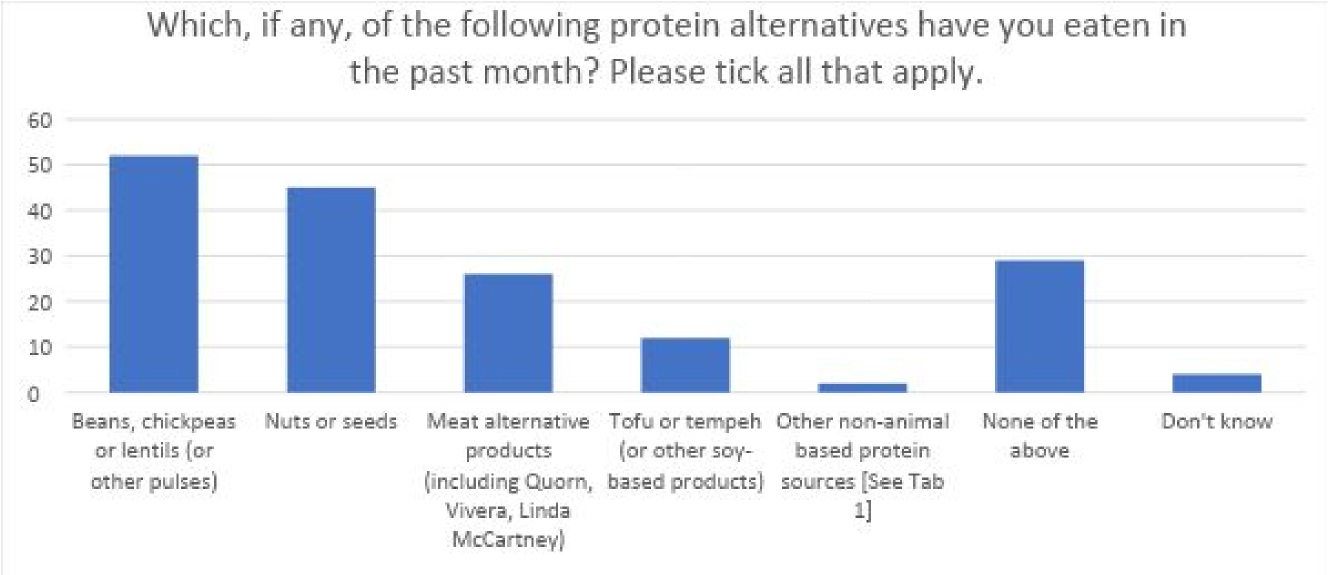
● Animal welfare remains the main reasons for eating or considering eating less meat and fewer meat products.
● The biggest movement from 2017 to 2019 is the increased acceptance of high carbon footprints/climate change as a reason to consume less meat, which has overtaken health (29% carbon footprint; 24% health).
● There is also a marginal increase in wider environmental concerns (e.g. damage to wildlife and habitats, pollution, water usage) as a driver (22%, up from 19% in 2017).

Support for levers to reduce meat consumption



● 'Better education in schools on how what we eat impacts on our health and the environment' (35%), 'clear labelling to indicate how animals are reared' (31%), and 'clear labelling of the country of origin for all meat and meat products' (29%), were the most popular choices for most important improvements to help people's food choices.
● However, better education and origin labelling have declined since 2017 (from 38% and 36% respectively), whereas 'Provide grants and support for farmers producing meat to higher animal welfare and environmental standards' has risen from 23% to 27%.
● Support is also growing for supermarkets and food companies providing better meat-free/meat-reduced alternatives (from 15% in 2017 to 19% in 2019).

Protein alternatives



- Natural unprocessed products are by far the most popular for proteins eaten in the last month (52% pulses; 45% nuts and seeds), followed by meat alternatives (26%).
- These results largely hold across socio-economic backgrounds and ages, although there's a regional difference – fewer nuts and seeds are consumed in the North of England and Scotland (38%) than in London (52%).