



Appetite for Change

July 2021 Research update

Making healthy sustainable
diets easy for everyone

from **IGD**



Our ambition is to make healthy and sustainable diets easy and accessible for everyone, by leading industry collaborations and building greater knowledge of what really works.

Our nutrition experts use the latest research and behavioural science to develop practical tools that help the whole industry. We are collaborating with and inspiring companies to adopt best practice and implement change.

from **IGD**

Background

At IGD our ambition is to make healthy and sustainable diets easy and accessible for everyone.

Over three years, we've undertaken consumer research with 6,000 UK consumers, to understand the opportunities for and barriers to positively shifting diets.

We have captured people's attitudes prior to healthy, sustainable diets, before, during and post COVID-19 restrictions and are now putting theory into practice with millions of UK shoppers, to drive tangible behaviour change in real life settings.

This wave of research was carried out between 30th July - 2nd August, after the lifting of restrictions in England in July

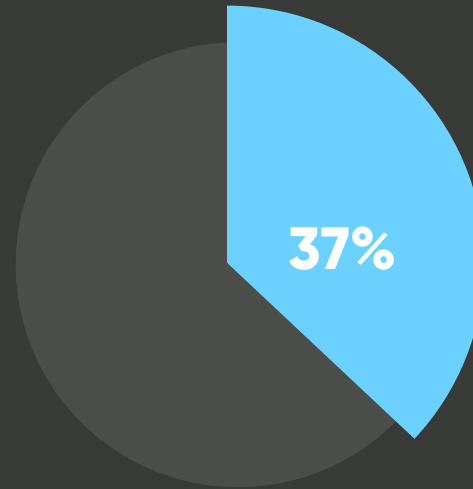
Our latest research....

58% are open to change

There is still a significant Appetite for Change.

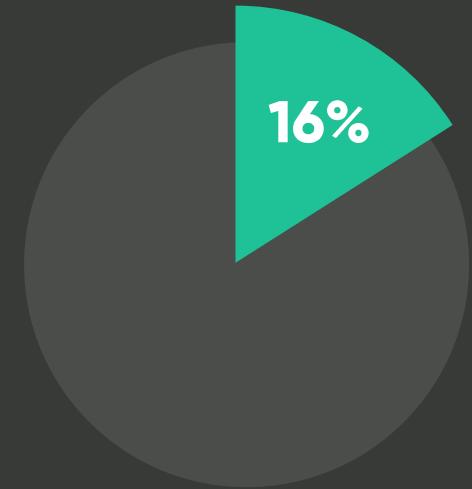
58% of shoppers are willing to change their eating habits to be healthier and more sustainable .

This is consistent over three years.



Perceive healthy, sustainable eating to be more expensive.

This has reduced from 41% in Nov 19 and remains consistent with 38% in July 2020.



List the environment as their main motivator for healthy, sustainable eating

This is a statistically significant increase from 13% in July 2020.

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**Healthy sustainable
diets are important**

Health from **IGD**



Our diet impacts on our health and the planet

Changing what we eat and drink, is the **most impactful way** to improve our health and that of the planet¹



- Obesity is one of the biggest health problems this country faces
- 2/3 of UK adults are above a healthy weight²

- We produce, eat and waste more food than ever
- Up to 1/3 of carbon emissions and 70% of freshwater use is for agriculture¹

Most people aren't eating a healthy diet

- There are several models illustrating a healthy, sustainable diet
- UK government guidance **The Eatwell Guide**¹, sets a good direction of travel, by being better for our health and better for the planet
- Currently less than 1% of the UK population meet these targets



Benefits of following The Eatwell Guide

- 31% GHG emissions
- 34% Land use
- 17% Water use
- 17.9m Years of healthy life

To achieve healthy, sustainable diets...

Evidence shows we need to eat:

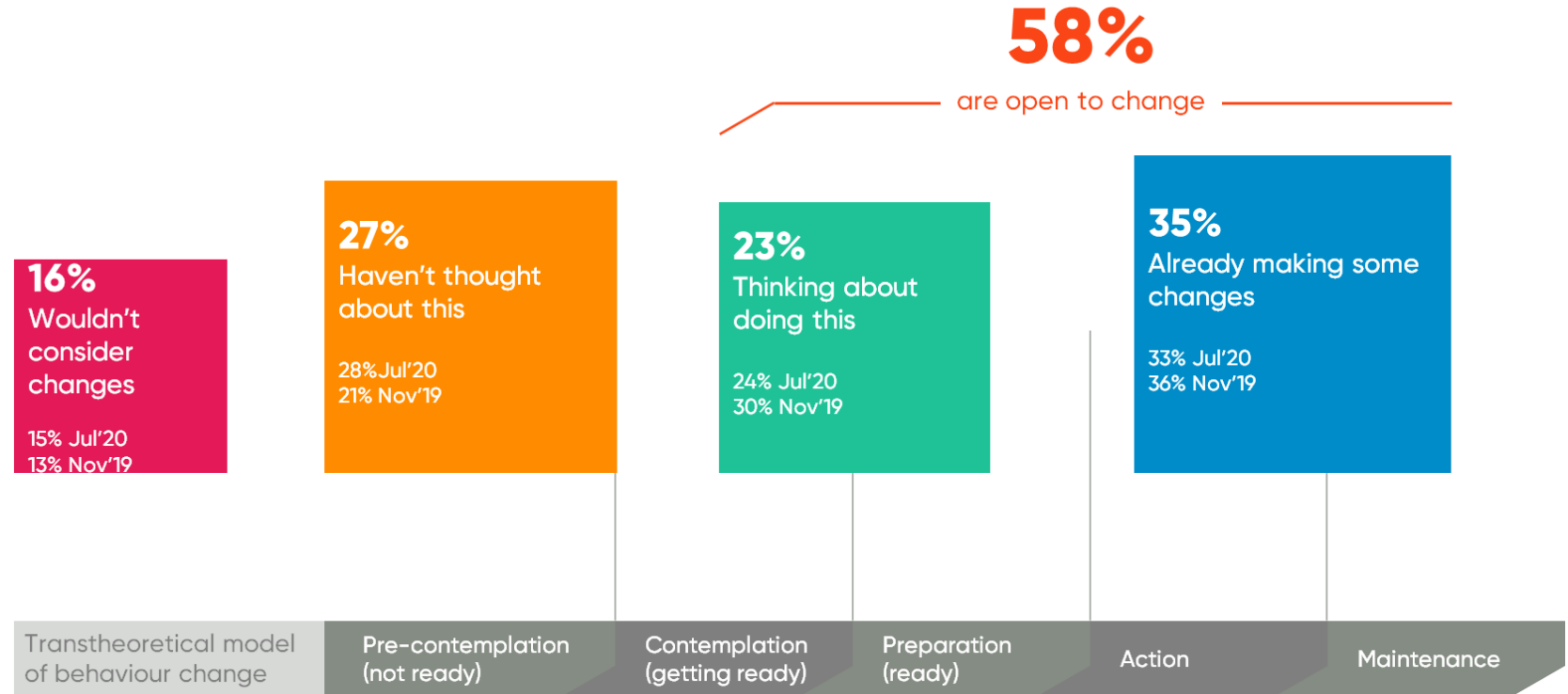
- ▶ More plant-derived foods, like fruit, veg, beans and grains
- ▶ Less meat and dairy
- ▶ Less of foods high in fat, sugar and salt

Appetite for Change has remained

The transtheoretical model of behaviour change, maps consumer readiness for change as a five-stage journey from not ready to maintaining new habits. It allows us to group individuals and find targeted solutions to help them become healthier and more sustainable.

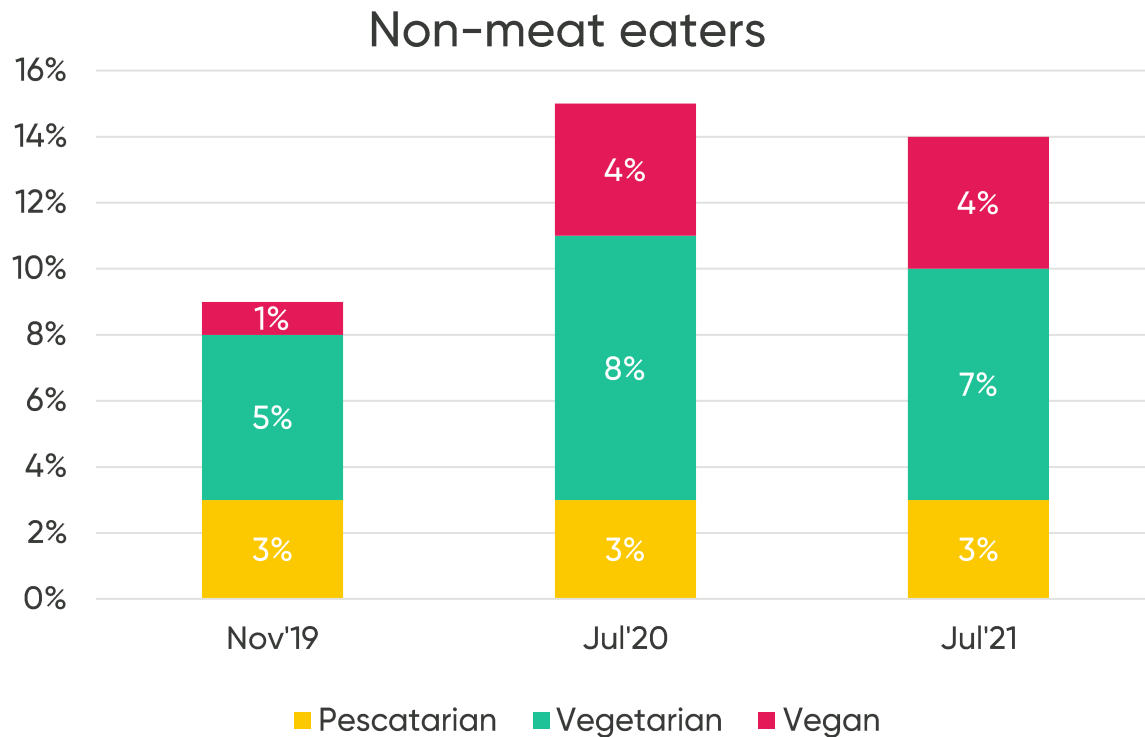
58% of consumers are already changing or considering making changes to be healthier and more sustainable. The blue and green groups present a big opportunity, as they welcome help from industry and are looking for products and solutions to support them.

Maintenance levels (blue) have stayed strong for a few years showing sustained behaviour change is possible, but there has been a reduction in the amount of people preparing to change (green). This means we must make change easy.



Meat-free diets are increasingly popular

Since 2019 all age groups, genders and demographics have seen a rise in non-meat eaters. This is normalising change

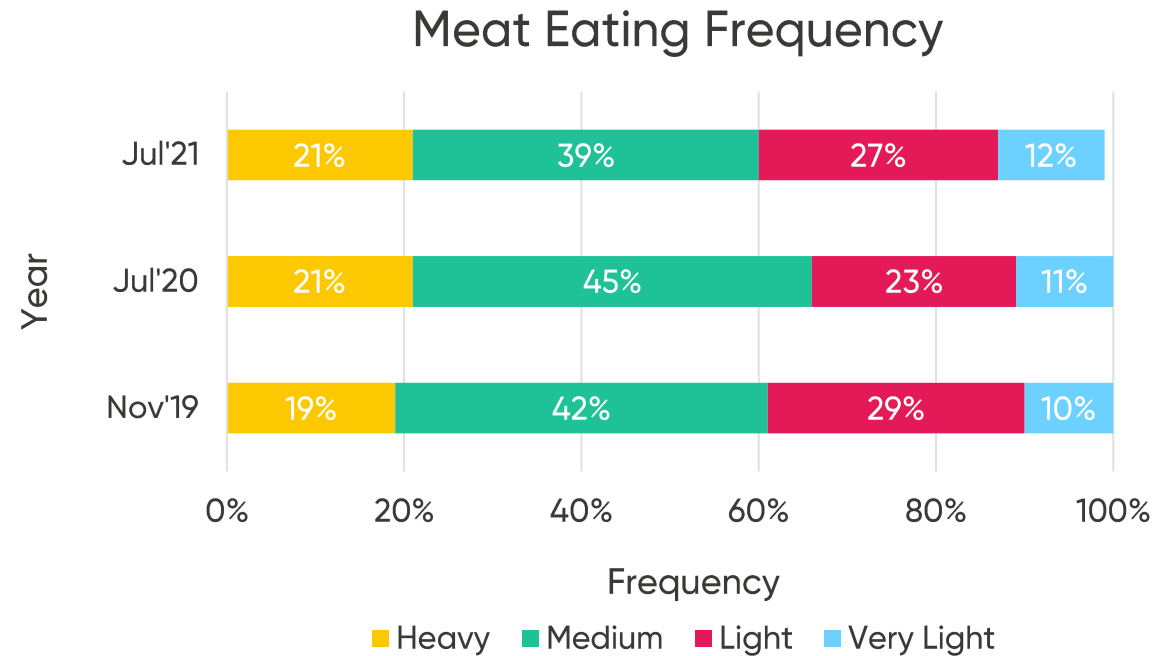


- Many gave up eating meat during the pandemic. One year on, levels of non-meat eaters have been maintained, suggesting long term behaviour change has occurred
- Across most groups, growth seen last year has been maintained. There was however a drop in non-meat eaters aged 25-34 (18% in July 2020, 13% July 2021). Both however are an increase on pre-pandemic levels (11% Nov 2019)
- 18-24s continue to lead the way in reducing meat consumption with 1 in 5 currently not eating meat

For those who eat meat, frequency has reduced



- Meat eating frequency has returned to pre-pandemic levels
- There has been a significant reduction in Medium meat eaters and an increase in Light meat eaters
- Those 18-24 and 55+ are now eating meat significantly less frequently than in 2019 and 2020
- Frequency reduction was most significant in higher socio-economic groups (AB) whose meat consumption now mirrors lower socio-economic groups



Heavy: Eat meat everyday
Medium: Eat meat every other day or a few times a week
Light: Eat meat once or twice a week at most
Very Light: Eat meat every two weeks or less

Positive change is holistic

- ▶ **52% have already increased the amount they cook from scratch**
- ▶ 77% have increasing or thinking about increasing their fruit and veg intake
- ▶ 67% have reduced or are considering reducing consumption of high sugar products

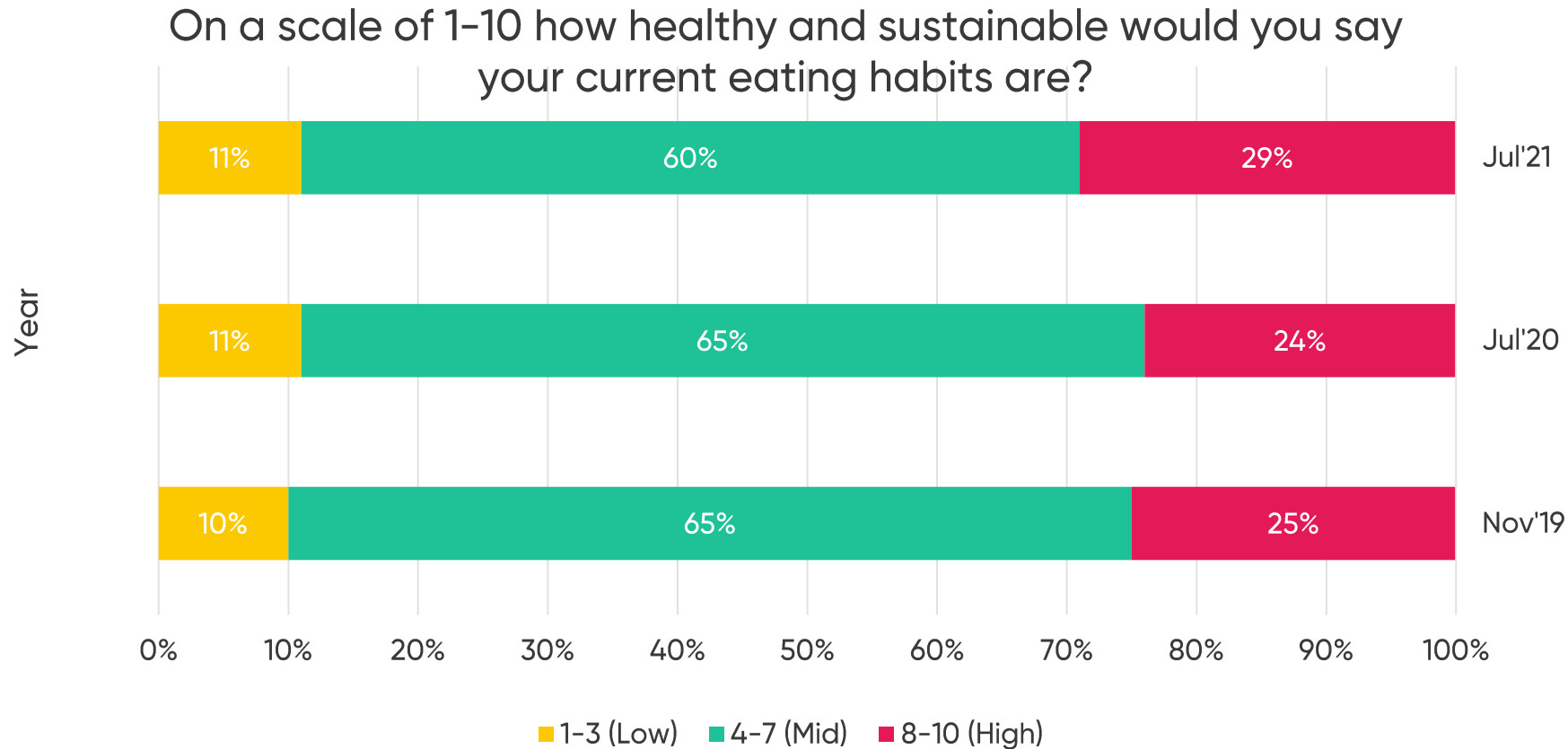


Drivers and barriers

Health from IGD



Most people continue to see their diets positively



Although many say they are willing to change, a challenge we see is 'overconfidence bias' – that we generally overestimate how good we are.

We asked people to rate how healthy and sustainable their current eating habits were and received a positive response.

Unfortunately, we know the average UK diet doesn't meet healthy eating guidance and if consumers already think they are healthy and sustainable, this can be a challenge in driving change.

Between 2020 and 2021, the positive shift was driven by females and AB consumers.

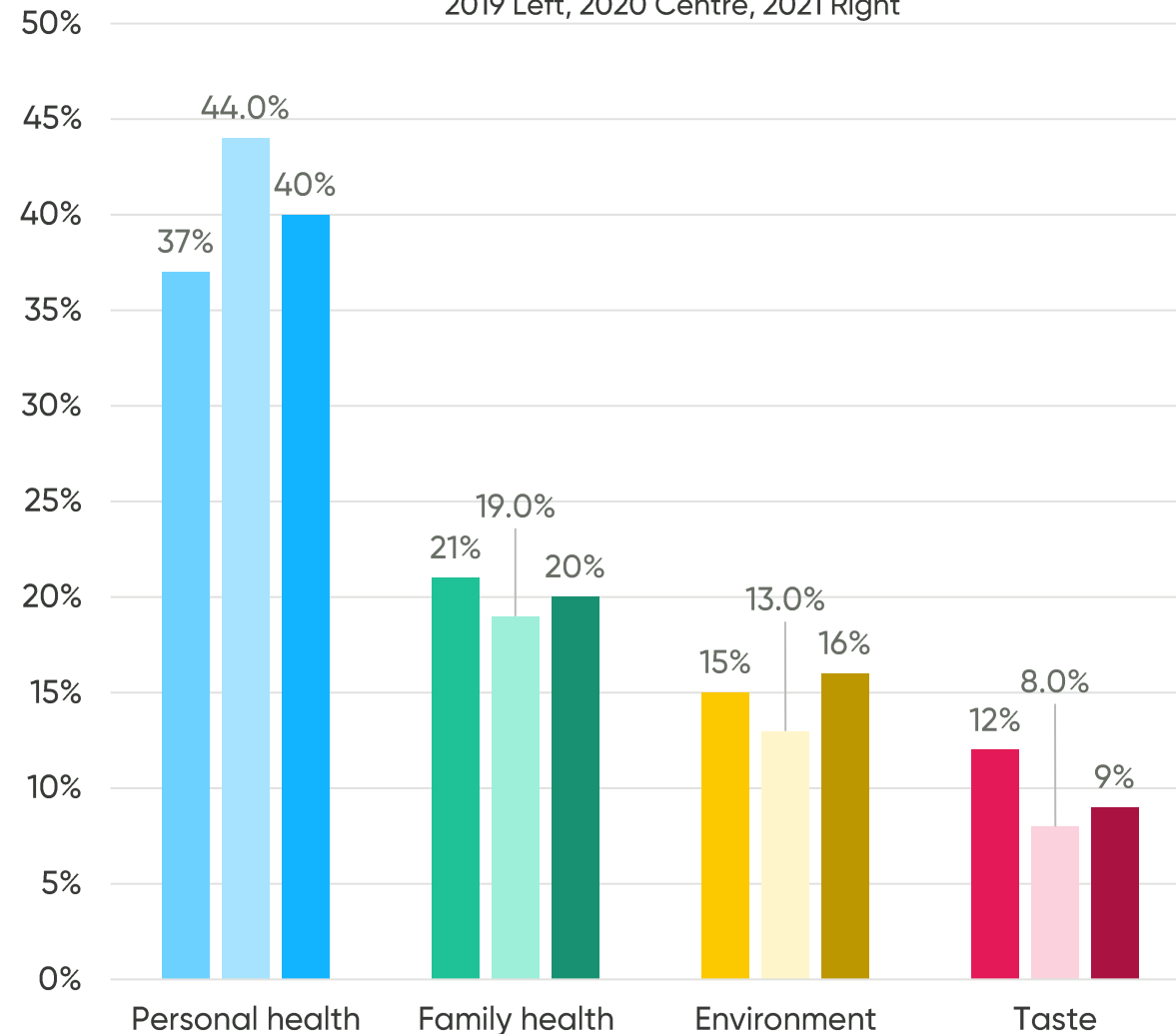
Health remains the primary driver for change

For most, personal health continues to be the main motivator.

Following a decline in lockdown, there has been a significant increase in those claiming the environment is their biggest motivator.

This highlights an audience is returning with sustainability high on their agendas.

Main motivation for healthy, sustainable eating
2019 Left, 2020 Centre, 2021 Right



Perceived higher cost remains the main barrier

Although many feel more confident about their finances, cost remains key



37% perceive healthy, sustainable eating to be more expensive, making it the number one barrier to change

Secondary barriers are similar across years

Lack of choice is significantly less of a barrier, highlighting industry action to innovate in the space of healthy and sustainable food and drinks

	Like taste of current foods	Prefer/ used to current foods	Convenience (easier to buy/prepare less healthy foods)	Lack of familiarity	Don't want to (reduce meat/dairy)	Lack of choice	More time & effort
JUL'21	21%	20%	18%	15%	16%	11% ↓	10%
JUL'20	24% ↑	23% ↑	18%	17%	17%	14%	12%
NOV'19	19%	18%	18%	18%	15%	13%	12%

Opportunities for industry

Health from IGD



Opportunities for industry

Make it easy!

- Offer easy solutions to help with the trend for healthy, scratch cooking

Hero Taste

- Influence shoppers with recipe cards, on pack cues and sampling

Challenge cost perception

- Use media, signage and promotions to show that healthy eating can be tasty and budget friendly



Influence

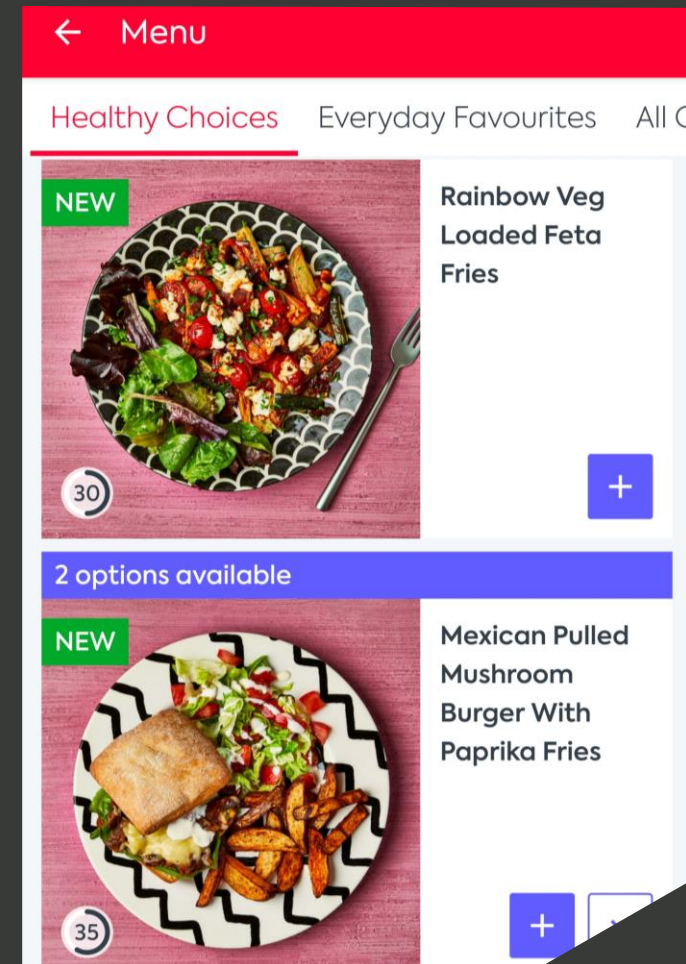
Opportunities for industry

Signpost healthier products

- Use health claims, roundels and nutrition information to empower healthy choices
- As health is top of mind, highlight fruit, veg, grains and pulses using colourful signage and promotions

Interrupt shopping missions with placement

- Help healthy options stand out in store and online to enable quick purchasing decisions



Influence



Signposting



Placement



Product

We're turning theory into action

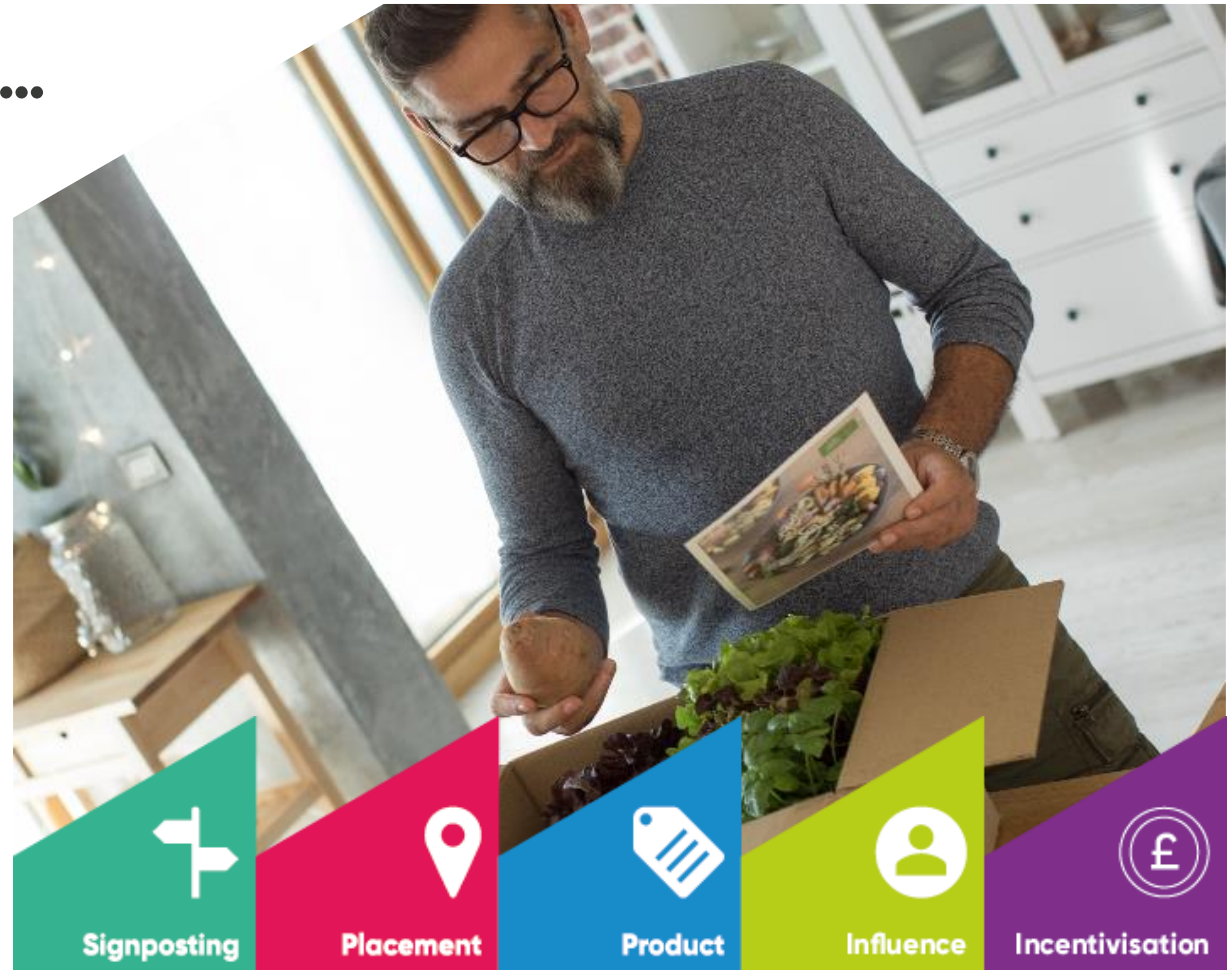
To change behaviour for good...

We aim to make healthy, sustainable diets easy and accessible for everyone

We have used this research and behaviour change theory to identify five levers for behaviour change.

We're now working with industry and the University of Leeds, to test these levers in real-life settings, with millions of people.

We're measuring how pricing, promotions, and placement can impact shoppers' baskets and their eating habits.



How you can take action

1

Visit our new online hub

It's packed with resources to help you:

- understand why healthy, sustainable diets should be central to your business strategy
- get inspiration from what other organisations are doing
- learn about our real-life trials and research partners

Take me to the hub

2

Contact us

- Ask us any questions you have
- Tell us about your success stories
- Work with us to trial real-life solutions and inspire others

Get in touch – Hannah.skeggs@igd.com

Health from IGD