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Healthy sustainable diets: driving change

Our second report on
how the food industry can
drive healthier and more
sustainable diets in the UK

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Health from **IGD**





Foreword – Susan Barratt

With our diets having such a huge impact on our health and our planet, now is the time for collective action. The most impactful way to make a difference is to change what we eat and drink.

IGD has spent three years working with industry to build knowledge around how to shift diets. We have facilitated five large-scale behaviour change interventions to date, accelerating the pace of change within food retail and health policy.

Since the release of [IGD's Driving Change](#) report last year, we have seen healthy and sustainable diets become embedded into the government food strategy.

As a result, multiple government departments have joined forces to fund research on driving positive behaviour change for health and sustainability.

Whilst there has been good momentum, the cost-of-living crisis amplifies the urgency for action. It is already exacerbating financial pressure on businesses and households.

High inflation is causing a decline in real incomes and health is falling down the priority list for many struggling households. For the poorest households, the cost of travel will reduce the ability to shop around, and the cost of cooking a meal may become a genuine factor in deciding what, or how often, to eat.

In previous recessions, we have seen increasing levels of both obesity and malnutrition, especially in low-income groups. We must act now to ensure health disparities do not worsen.

This report explores findings, from three retail trials with Sainsbury's and ASDA, run in partnership with IGD and the University of Leeds.

Encouragingly, one trial resulted in long-term behaviour change, with low-income families buying more fruit and vegetables and fewer unhealthy discretionary items.

This is a hugely exciting project, demonstrating the genuine opportunity our industry has to improve diets.

Please use this report to drive change and create impact in your organisation; and join us in making healthy and sustainable diets easy for everyone.

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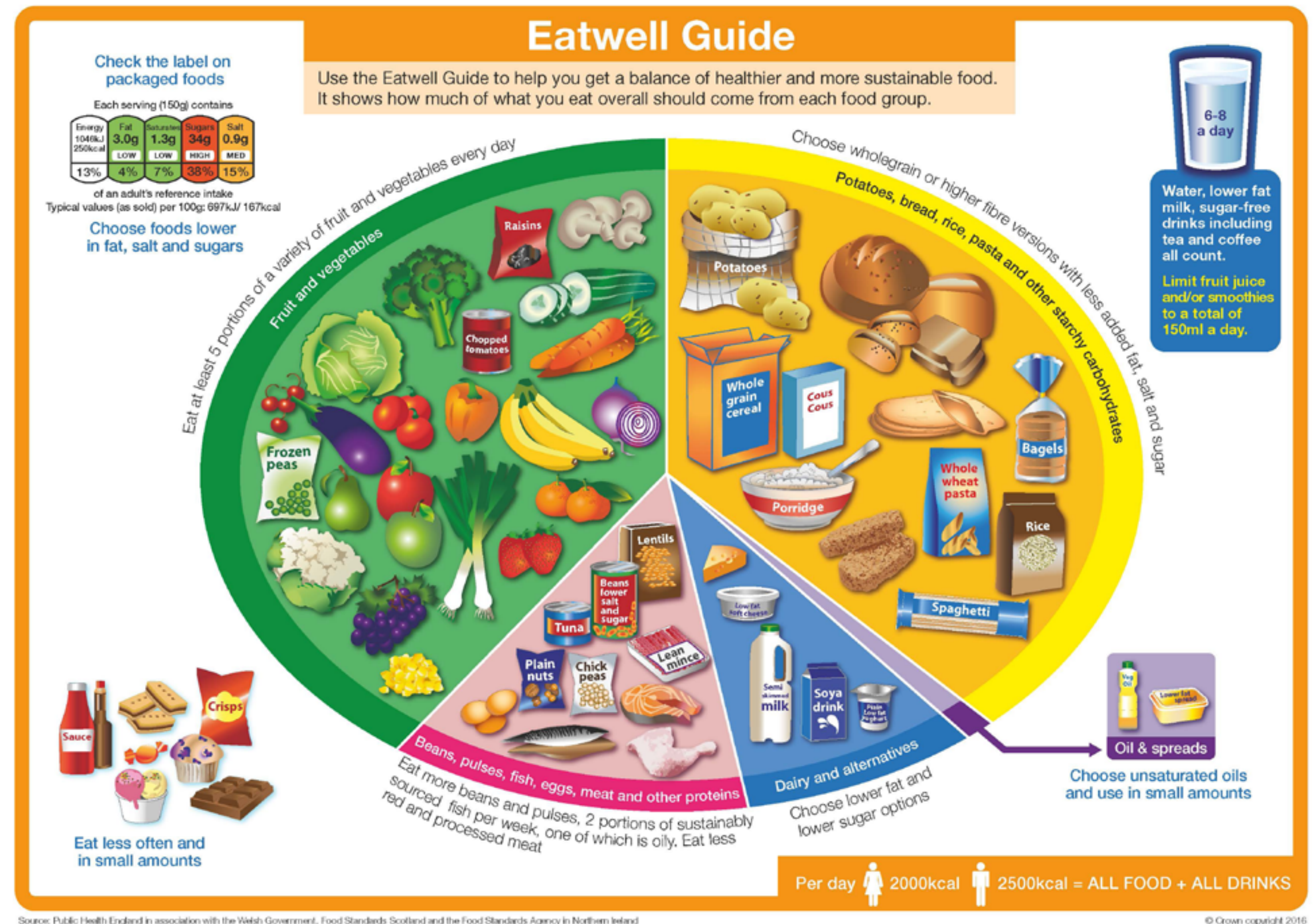


Most people aren't eating a healthy diet

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

Benefits of everyone in the UK adopting The Eatwell Guide

- 31% greenhouse gas emissions
- 34% land use
- 17% water use
- 17.9m years of healthy life



Source: BNF literature review 2020, Eatwell guide, 2015, The Carbon Trust (2016) 'The Eatwell Guide: Modelling the Health Implications of Incorporating New Sugar and Fibre Guidelines

Together, we are building knowledge of how to shift behaviour

IGD conducted three years of consumer [research](#) alongside behaviour change experts to understand the appetite for healthy and sustainable diets, and identified **five levers that can drive behaviour change**.

Together with our industry working group and the University of Leeds, we are putting theory into practice to understand what works and what doesn't to promote better food choices, in real-life settings.

Five large-scale trials in retail settings across the UK have now concluded, with short and long-term impact being analysed.

This report shares findings from our first three trials and recommendations on how industry can effectively shift consumer behaviour towards healthier and more sustainable diets.



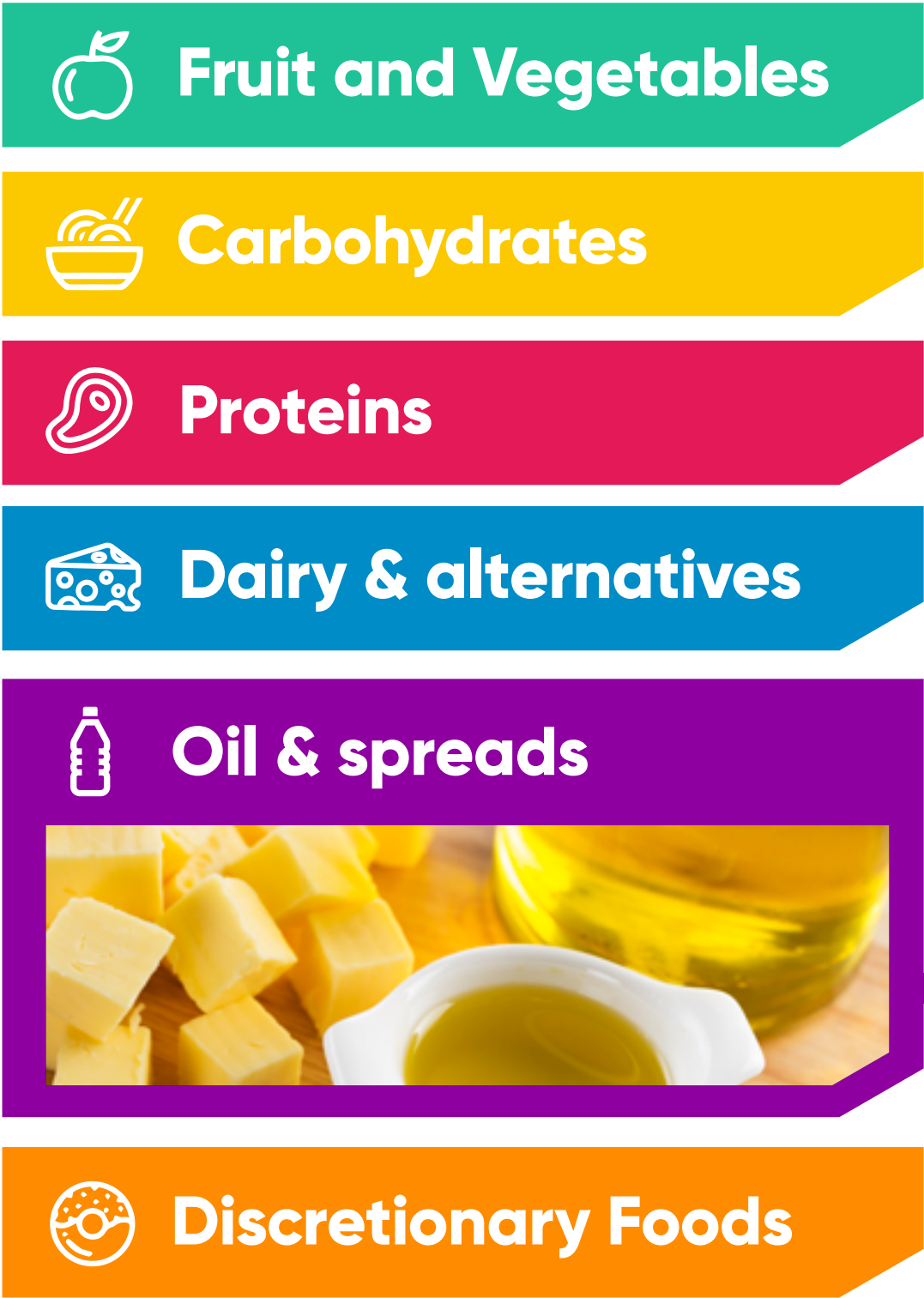
The five levers



Trials measure shift towards the Eatwell Guide

In order to meet the UK government dietary guidelines, most people need to eat:

- more fruit and vegetables
- less meat and dairy
- fewer discretionary foods



These foods are not located on the plate of the Eatwell Guide as they should be eaten less often and in small amounts. Typically, this group represents food items that are high in fat, salt and sugar.

Composite foods

In this research an additional category, 'ready meals and composite dishes', represents ready meals and other products that cannot be attributed to one single food group - for example, lasagne.



Chapter 1

Can boosting the value of Healthy Start vouchers help low-income families improve their diets?

Shoppers redeeming Healthy Start vouchers in Sainsbury's were eligible for £2 extra a week to spend on fruit and vegetables.

This successfully shifted behaviour, with more fruit and vegetables and fewer discretionary items purchased, even after the financial incentives stopped.

Chapter 2

Should plant-based products be sold alongside meat?

Asda moved plant-based meat alternatives out of a designated bay within the meat aisle, to sit alongside their meat counterparts.

This resulted in a reduction in sales of relocated products, showing consumers did not support the new placement.

Chapter 3

Do promotions on fruit and vegetables drive long-term behaviour change?

Sainsbury's used prominent placement, a reduced price and colourful posters to encourage shoppers to buy a variety of fruit and vegetables.

A strong uplift in portions sold was achieved but only for a short period of time.

Chapter 4

Recommendations for industry

Our trials to date demonstrate how challenging price perception and personalising interventions can drive positive behaviour change. Using multiple behavioural levers in combination can also be effective.

Chapter 1

Does boosting the value of Healthy Start vouchers help low-income families improve their diets?

Behaviour change levers used in this trial:

① Incentivisation

Health from IGD



Healthy Start Scheme

Healthy Start is a government food assistance programme for low-income families

Nutrition during pregnancy and early years directly impacts long-term health.

To reduce dietary inequalities in the UK, the Healthy Start Scheme has been in place since 2006. It provides financial support to low-income families and pregnant women through **vouchers for fruit, vegetables, pulses, milk or infant formula.**

Expanding the scheme and increasing the value was a recommendation of the [National Food Strategy Independent Review – The Plan.](#)

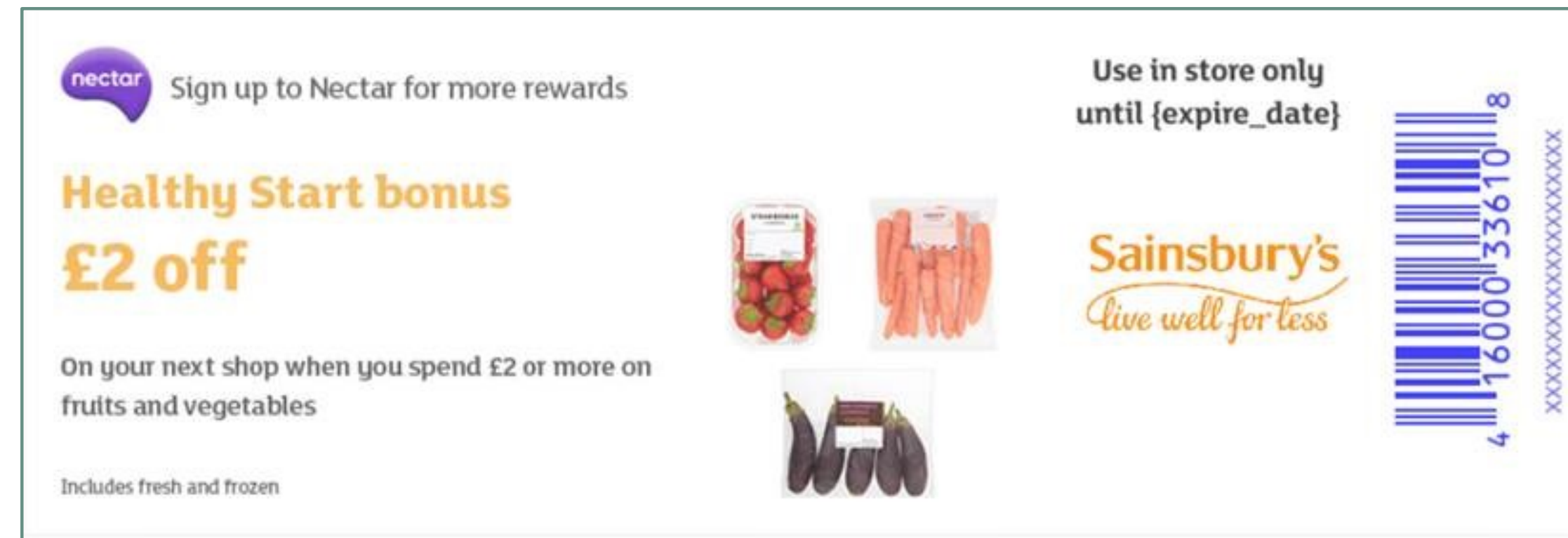
Summary

- Expectant mothers and families with children under four are eligible if receiving:
 - Child Tax Credit (annual income of £16,190 or less)
 - Universal Credit (monthly earnings of £408 or less)
- The government increased the weekly Healthy Start voucher value from £3.10 to £4.25 in April 2021
- During the trial in 2021, Healthy Start Vouchers were paper. In 2022 vouchers were digitalised and replaced with a Healthy Start card



What happened in the trial?

- To tackle increasing financial pressure, between February and August 2021 Sainsbury's offered customers a £2 top-up voucher each time they used a government Healthy Start voucher in the supermarket
- Vouchers could be printed in any of Sainsbury's 800 supermarkets but not in convenience stores or online
- The vouchers were redeemable in any Sainsburys store against fresh, canned and frozen fruit and vegetables
- With the University of Leeds, we've investigated how these top-ups impacted the shopping habits of 1383 regular shoppers across four UK regions who used Healthy Start Voucher top-ups*



*Regular Sainsburys shoppers purchase from multiple product categories using the Nectar loyalty card

Key findings

1. When using top-up vouchers, shopping habits shifted positively towards the Eatwell Guide
2. Healthier habits continued when not using the vouchers and after the trial finished
3. There is an opportunity to encourage use of the top-up scheme



1. When using top-up vouchers, shopping habits shifted positively towards the Eatwell Guide

In order to meet UK government dietary guidelines, we need to consume more fruit and vegetables, less meat and dairy and less discretionary foods.

When using top-up vouchers, shopping habits shifted positively towards the Eatwell Guide with fewer discretionary purchases and a higher intake of fruit and vegetables. On average these baskets contained:

- ▲ 13 extra portions of fruits and vegetables
- ▲ 12% more fresh fruit*
- ▼ Fewer composite dishes
- ▼ Fewer discretionary products
- ▼ Less protein rich food e.g. meat

How did shoppers spend their top-ups?

98% of vouchers redeemed the full £2 on fruit and vegetables, as intended**. Vouchers were spent mainly on fresh fruit and vegetables rather than frozen, canned or dried.

This is the second IGD incentivisation trial where fruit has outperformed vegetables.

Just 5% of top-up vouchers were used on frozen vegetables.

* as a proportion of their total fruit and vegetable purchase

** based on deep-dive analysis in the Yorkshire and Humber region

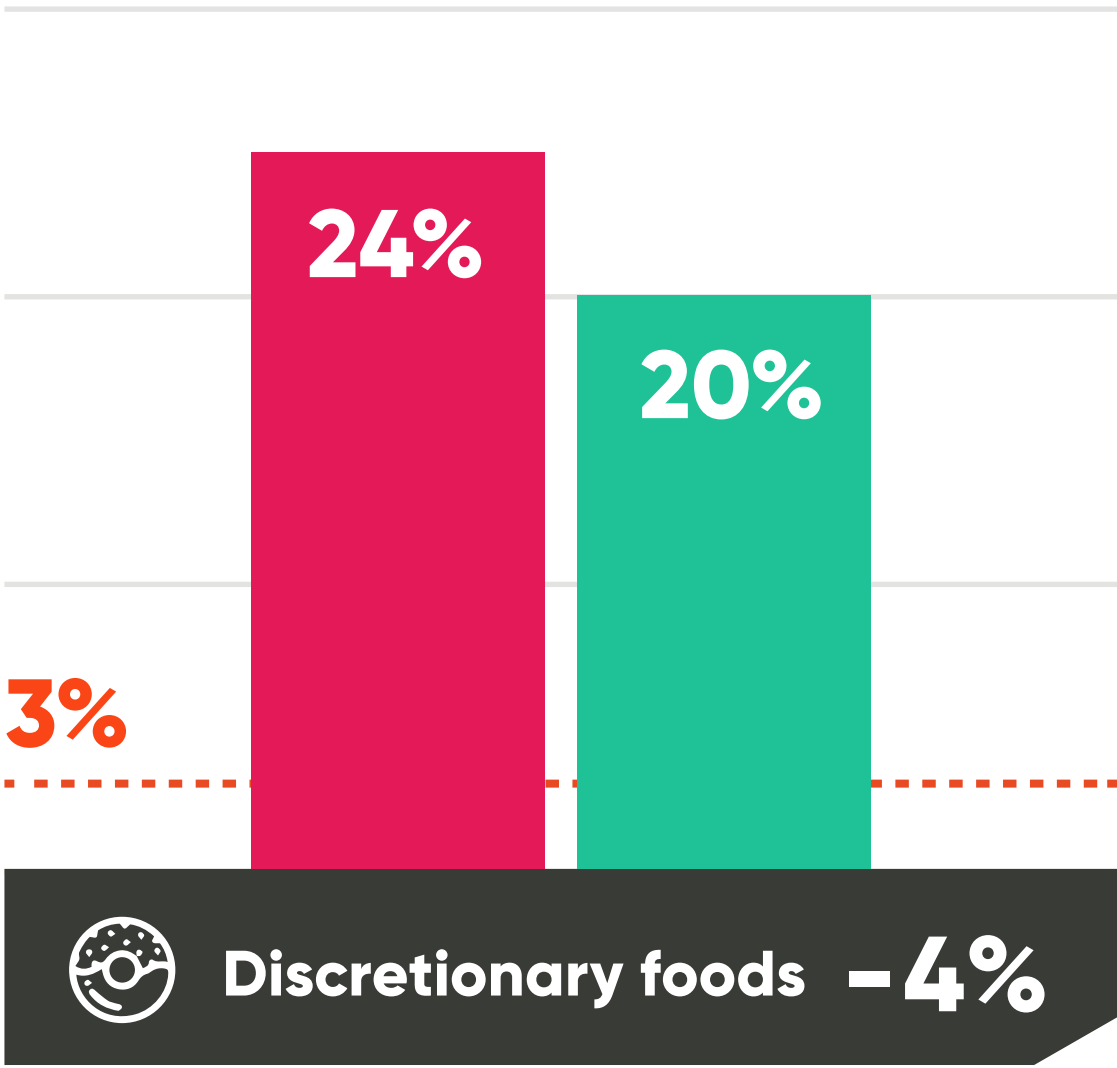
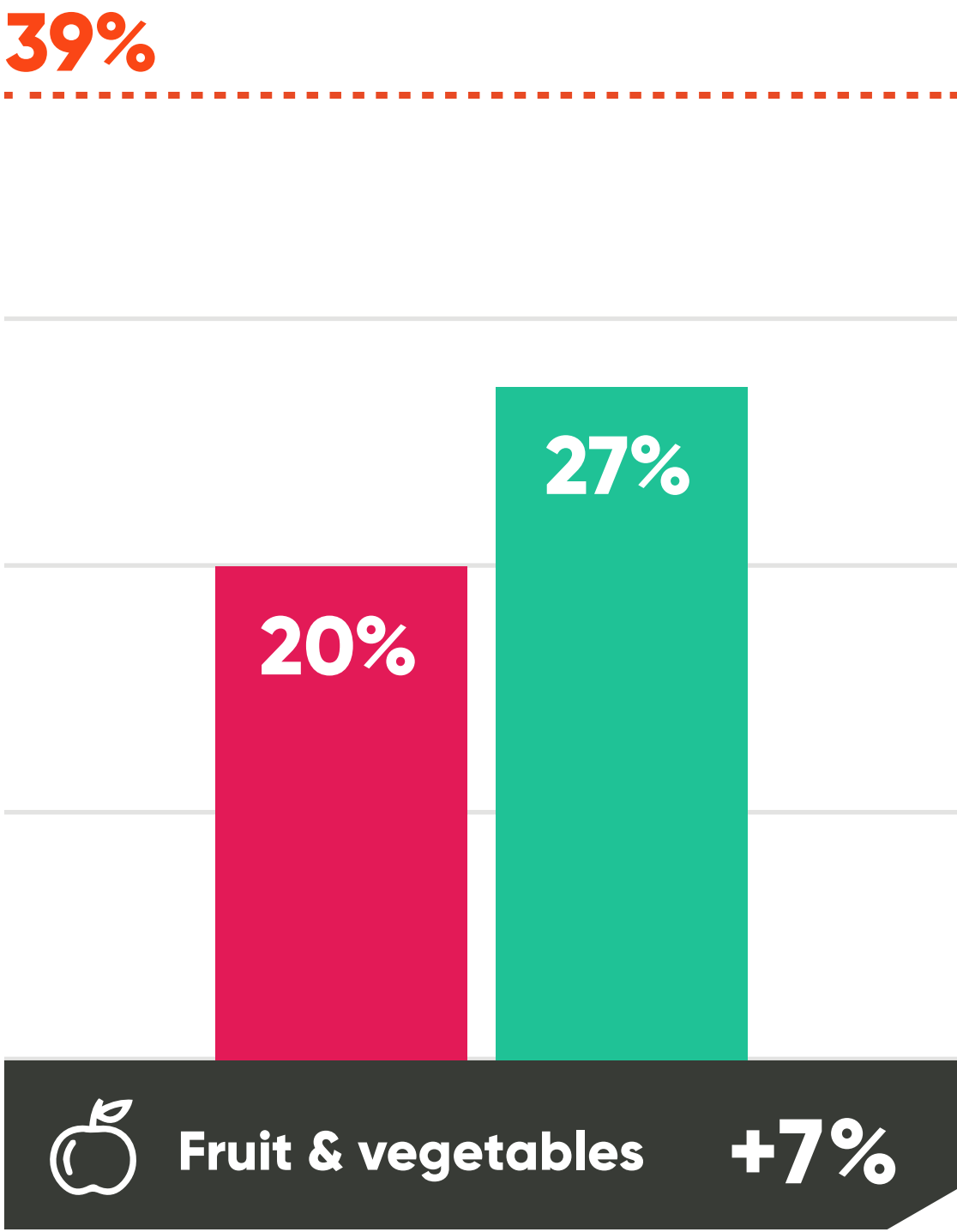


1. When using top-up vouchers, shopping habits shifted positively towards the Eatwell Guide

Baskets bought by users of the Healthy Start scheme are a long way from meeting the proportions of the Eatwell Guide. When redeeming the top-up vouchers, proportions shifted to have 7% more in fruit and vegetables, fewer protein rich foods, and 4% less discretionary foods.

- Eatwell target
- Before trial
- During trial for transactions redeeming top-up vouchers

Purchasing habits compared to the Eatwell Guide



2. Healthier habits continued when not using the vouchers and after the trial finished

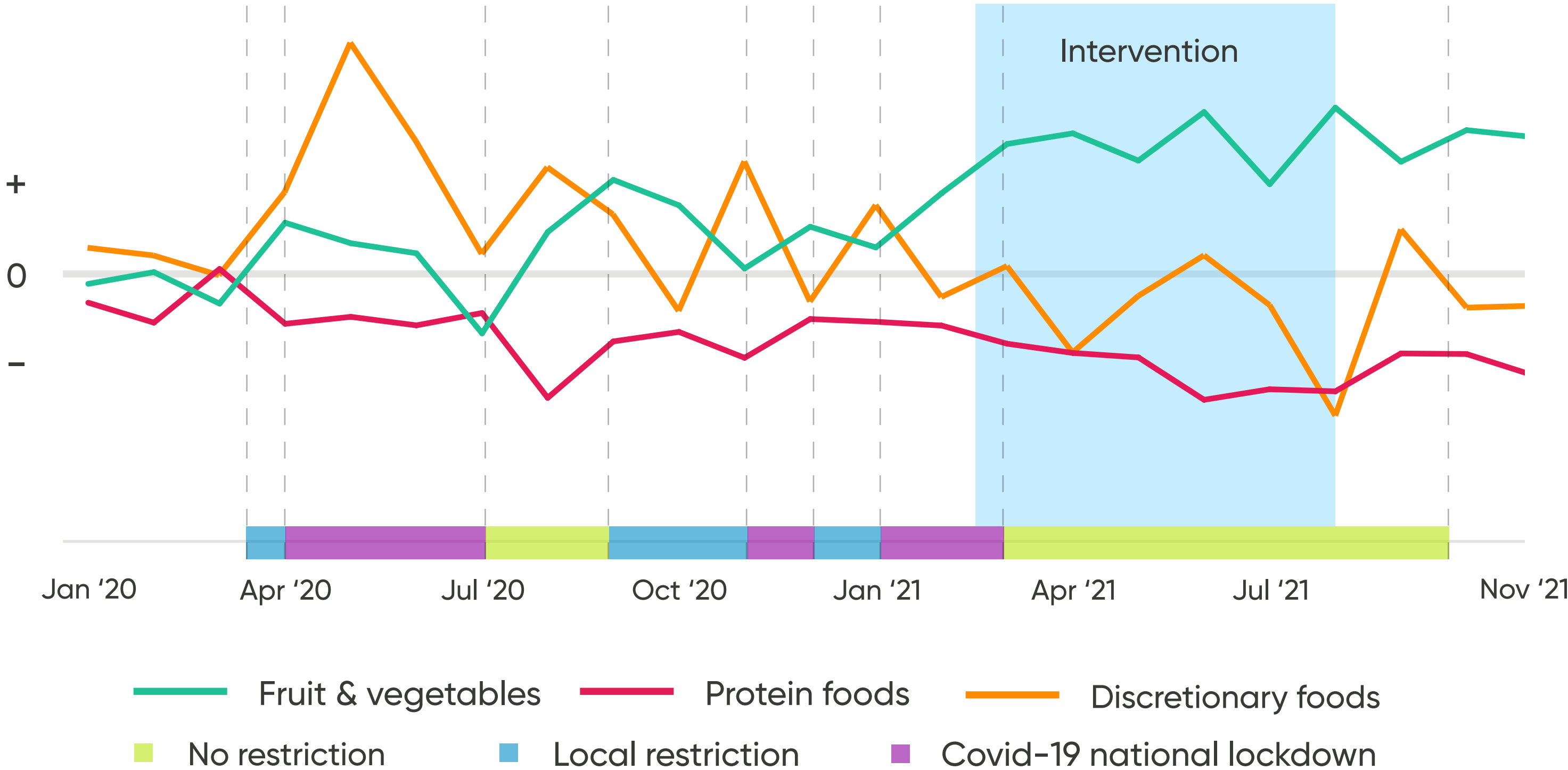
During the intervention period there was a positive impact on the behaviour of engaged shoppers, even on the occasions they were not using a top-up voucher.

Over six months, these shoppers purchased:

- more fruits and vegetables
- fewer discretionary items
- fewer protein rich foods
- This trend cannot necessarily be attributed to the intervention as protein has been steadily declining for some time

A small but significant change in behaviour was measured for the three months after the trial.

Change in Eatwell Guide proportions since 2019 baseline



Note: The government increasing the weekly Healthy Start voucher value from £3.10 to £4.25 in April 2021 likely impacted these results, although baskets using the top up voucher purchased more F&V than baskets without in this cohort of HSV users

*Engaged shoppers are those who engaged with the trial at least once, within the regular shopper cohort

3. There is an opportunity to increase use of the top-up scheme

Redemption rates were high for paper vouchers

During the trial period almost 38,000 top-up vouchers were used by Sainsbury's customers nationwide. This was 17% of all vouchers printed, higher than typical redemption rates of other types of printed vouchers at the time

Most shoppers used the top-up vouchers infrequently

- Half of eligible customers used a top-up voucher only once during the six-month trial period
- Just 2.5% of customers used the voucher 15 or more times in the 28 weeks – getting greater value from the scheme

Vouchers were used more frequently

- in stores in the most deprived areas*, suggesting that those who needed support most were accessing it more often

Digitisation of future interventions may help

- Paper vouchers could only be printed in supermarkets
- Paper vouchers are known to have a poor redemption rate. They are often not picked up, forgotten or lost by the next shopping trip. Sometimes the printers run out of paper
- There is also a stigma around redeeming vouchers in store

*based on deep-dive analysis in the Yorkshire and Humber region

Chapter 2

Should plant-based products be sold alongside meat?

Behaviour change levers used in this trial:

📍 Placement

Health from IGD



Existing research on plant-based placement

Sales of meat-free foods grew by 40% between 2014 and 2019.

By 2021, 38% of UK shoppers claimed to be following or interested in following a flexitarian diet.

In our Appetite for Change research, **57% of people told us that ranging meat-free in the meat aisle would help them choose healthier and more sustainable foods.**

This theory is supported by research:

- The World Resources Institute found presenting vegetarian items in a separate section on menus reduces ordering by 56%
- Two major UK retailers ran trials to investigate the sales impact of moving meat alternatives into the meat aisle in a marked and separate bay

- In both trials, sales of meat-free increased
- In one retailer this was by 31%, with no reduction in meat sales

This suggests prominent placement of plant-based items alongside meat items increases sales but does not always seem to instigate switching.

The following trial moved plant-based products even further into the meat aisle to sit alongside their meat counterparts. We would have expected this to work from the theory, but in practice it did not.



What happened during the trial?

This intervention within ASDA stores measured the impact of placing plant-based meat alternatives directly next to their counterpart meat products.

Before the trial ASDA, as standard practice, ranged plant-based meat alternatives within the meat aisle in a dedicated bay. This bay had a significant amount of marketing at the point of sale; it was brightly coloured and heavily branded using shelf barkers, fins and visual imagery.

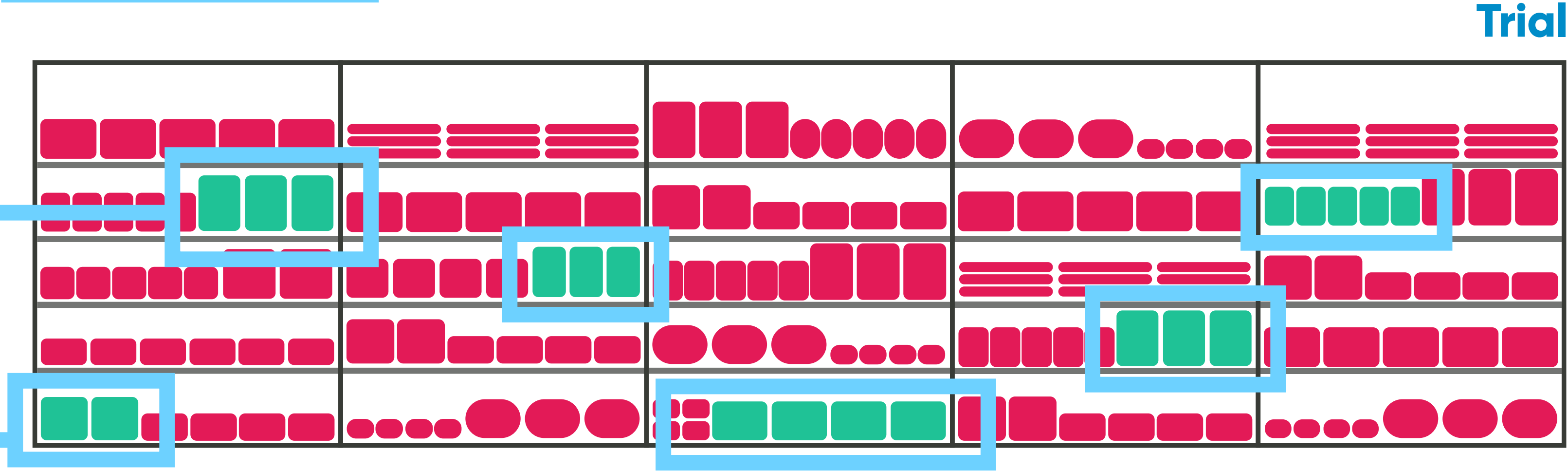
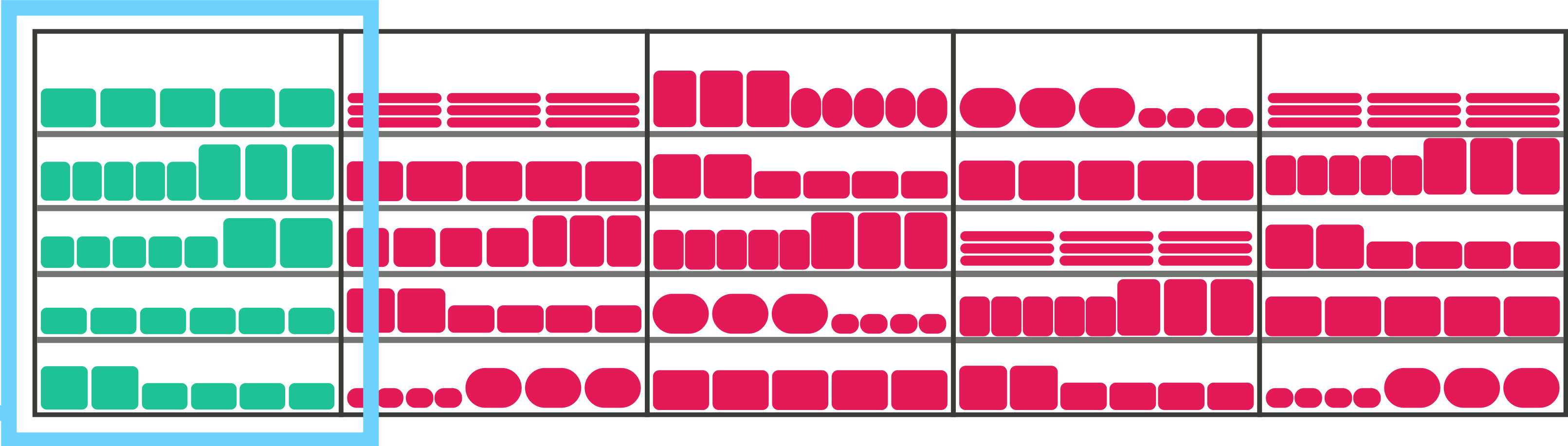
During the trial period, control stores retained the plant-based bay; its position and highly visual merchandising remained consistent.

In the six trial stores, products were relocated within the same aisle, to sit directly alongside their meat counterparts. Price, shelf space and availability remained consistent, but point-of-sale marketing could not be maintained for each individual product.

Complete purchasing data and nutrition information were captured to fully understand the impact on wider purchasing. This was important as plant-based alternatives are not always healthier.



What did it look like?



Key findings

- 1. Sales of relocated products declined by 30%**
- 2. Differences in price between meat and plant-based became obvious to shoppers**
- 3. Shoppers did not switch to other categories such as meat or frozen**



1. Sales of relocated products declined by 30%

- Placing plant-based meat alternatives beside their meat equivalents, rather than in a separate bay within the meat aisle, resulted in a significant reduction in the sales of these plant-based meat alternatives in trial stores
- The decline in sales of relocated products was greater in urban and more deprived areas, supporting the theory that price was a major barrier



2. Differences in price between meat and plant-based became obvious to shoppers

- 37% of shoppers say cost is the main barrier to them adopting healthier and more sustainable diets
- Meat products are often much cheaper than their plant-based meat alternatives
 - During the trial, on average, plant-based bacon was three times more expensive than animal-based bacon
 - Plant-based sausages were five times more expensive than animal-based sausages
- This price difference was highlighted to shoppers by ranging products directly next to each other

There is an opportunity to test placement without a price differential

- Co-op reduced the price of its GRO range to match the price of meat and dairy-based counterparts
- Tesco reduced prices across its Plant Kitchen range to make it more accessible. Reductions were significant, with six sausages reduced from £2.25 to £1.45



3. Shoppers did not switch to other categories such as meat or frozen

- Despite a 30% reduction in sales of relocated plant-based meat alternatives, there was no significant increase in meat sales
- Wider sales of plant-based meat alternatives, vegan and veggie products did not change during the trial period, suggesting shoppers did not replace products, and may have shopped in other stores
 - This suggests regular shoppers of relocated plant-based products were unable to find them

One major consideration is the role of signposting:

- The control store bay was clearly visible, using lots of colour and sitting at the end of an aisle
- Vegetarians and vegans could easily find products within this bay without fully browsing the meat aisle
- Once plant-based meat alternatives were relocated within the aisle, they became much harder for regular purchasers to find



ASDA's perspective

“ At Asda, ensuring our customers can access healthy, sustainable, and affordable food has never been more important. Despite this trial not shifting behaviour towards plant-based meat alternatives, we believe it's important to share our learnings with industry, NGOs and policy makers to build future research that adds value to all.

Building on the learnings we've taken since the launch of Asda's plant-based range in 2020 and on the findings from this trial, we are looking forward to expanding our vegan range by approximately 50% in 2023 to improve choice for customers, as well as improving the price position of meat-free choices. Additionally, encouraged by the findings from this trial, we will simplify the shopping experience for customers when they buy our meat-free ranges, by merchandising products in a dedicated, extended meat-free fixture in-stores.

We believe that findings from IGD's Healthy and Sustainable Diets working group will help to build the evidence base on positive behaviour change and inspire action across retailers, manufacturers and beyond. Running this trial with IGD and the University of Leeds has been a valuable experience for us as a retailer. We know that more needs to be done to understand the complexities of behaviour change and we are looking forward to testing other initiatives to nudge customers towards healthier, plant-based diets.

Beth Fowler

**Nutrition & Health
Strategy Manager**

ASDA



Chapter 3

Do promotions on fruit and vegetables drive long-term behaviour change?

Behaviour change levers used in this trial:

£ Incentivisation 📍 Placement ➡ Signposting

Health from IGD



Promoting fruit and vegetables could help meet 5 A Day guidance

Most people do not manage to eat five portions of fruit and vegetables each day



“ Many customers buy within a narrow range of familiar fruit and vegetables every week, and we know that only around 30–35% of adults achieve their daily 5 A Day. Therefore, this initiative was aimed at helping customers increase their fruit and vegetable intake whilst making it affordable to try something new.

Nilani Sritharan

Group Lead: Healthy & Sustainable Diets

Sainsbury's



What happened during the trial?

Sainsbury's reduced the price of various fruits and vegetables to 60p for four weeks in January 2020 and again in January 2021, in 101 stores across the country

This trial applied three behavioural levers



Incentivisation

37% of consumers say that cost is a barrier to them eating a healthy, sustainable diet.

Sainsbury's reduced the price of fruit and vegetables, and clearly communicated this throughout the campaign.



Placement

Using prominent store spaces e.g gondola ends generally increases impulse sales in less healthy categories.

This campaign gave prominent placement to promoted fruit and vegetables.



Signposting

Health is the biggest driver for changing diets, and taste can be a barrier.

The campaign used bright, visually appealing colours and taste cues to champion the health credentials of fruit and vegetables, making them look tasty and exciting.

Key findings

1. Sales of promoted fruit and vegetable portions increased by 78%
2. Healthier shoppers were more engaged
3. During the trial, diets shifted towards the Eatwell Guide, and some behaviour was sustained



1. The intervention increased portions of promoted fruit and vegetables sold by 78%

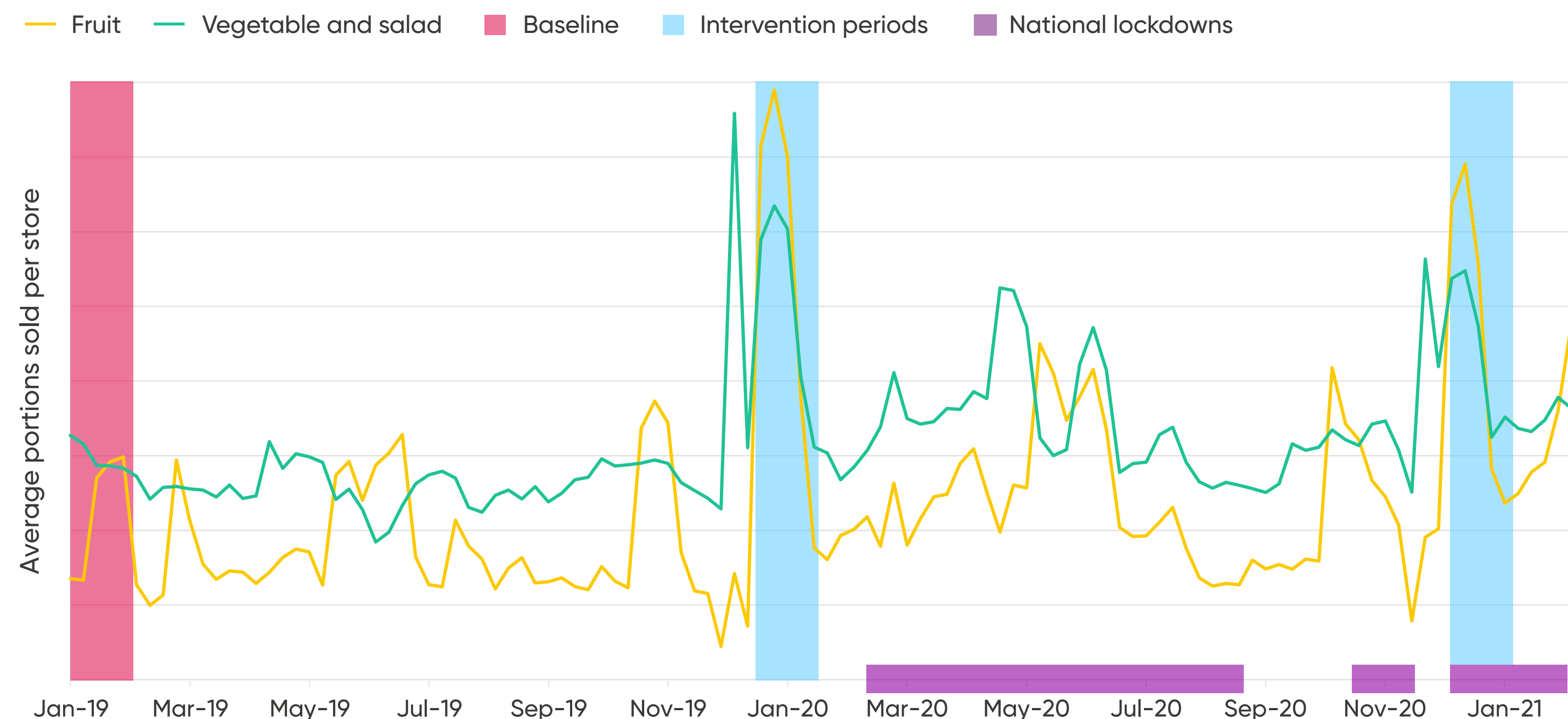
Looking across three years, the 60p fruit and vegetable intervention created a significant short-term sales uplift. In fact, price reductions to 60p led to a 78% uplift on promoted products in 2020 and 56% during the January 2021 Covid-19 national lockdown, compared to the baseline year.

Whilst January is already associated with people prioritising their health, we can see from 2019 baseline data that this intervention contributes to sales far above the expected seasonal increase.

Three weeks into the four-week intervention period, sales of promoted fruit and vegetables declined.

This decline may reflect people's finances prior to payday, or suggest that using placement and signposting only interrupts behaviour for a short time before going unnoticed by shoppers.

Sales of promoted fruit and vegetables



2. Healthier shoppers were more engaged

35% of regular Sainsbury's shoppers engaged with the trial and purchased a promoted item on 14% of their visits.

A common challenge when trying to shift behaviour is that health campaigns often appeal most to shoppers who are already managing to eat more healthily.

During this trial, **shoppers who engaged with the promotions were already purchasing 6% more fruit and vegetables** and less discretionary items than the average shopper. This suggests that the trial's low price point, prominent placement and imagery most appealed to shoppers who already purchase healthier foods.

Opportunities for future research

This intervention took place within the fruit and vegetable section of the store, therefore reaching those who already browse this space.

Using alternative placement to interrupt shoppers throughout the store could encourage shoppers to try new fruits or vegetables for the first time.

Replicating this intervention outside of the month of January would also be interesting.



3. During the trial, diets shifted towards the Eatwell Guide, and some behaviour was sustained

During both trials, engaged shoppers purchased more fruits and vegetables and less discretionary foods as a proportion

- 10% uplift in fruits and vegetables in 2020 and 6% in 2021
- 6% decrease in discretionary items in 2020, 4% in 2021

Generally, shoppers bought the promoted fruits and vegetables as additional items, rather than just switching to the cheaper fruits and vegetables.

The shift toward health didn't continue in other categories

- Although discretionary purchasing (e.g. chocolate bars) reduced, customers did not swap out of high fat, salt or sugar options to healthier alternatives in other categories such as dairy or proteins. This suggests they were not actively making healthier choices across their diet

After running the trial twice, a small but sustained behaviour change was seen for four weeks

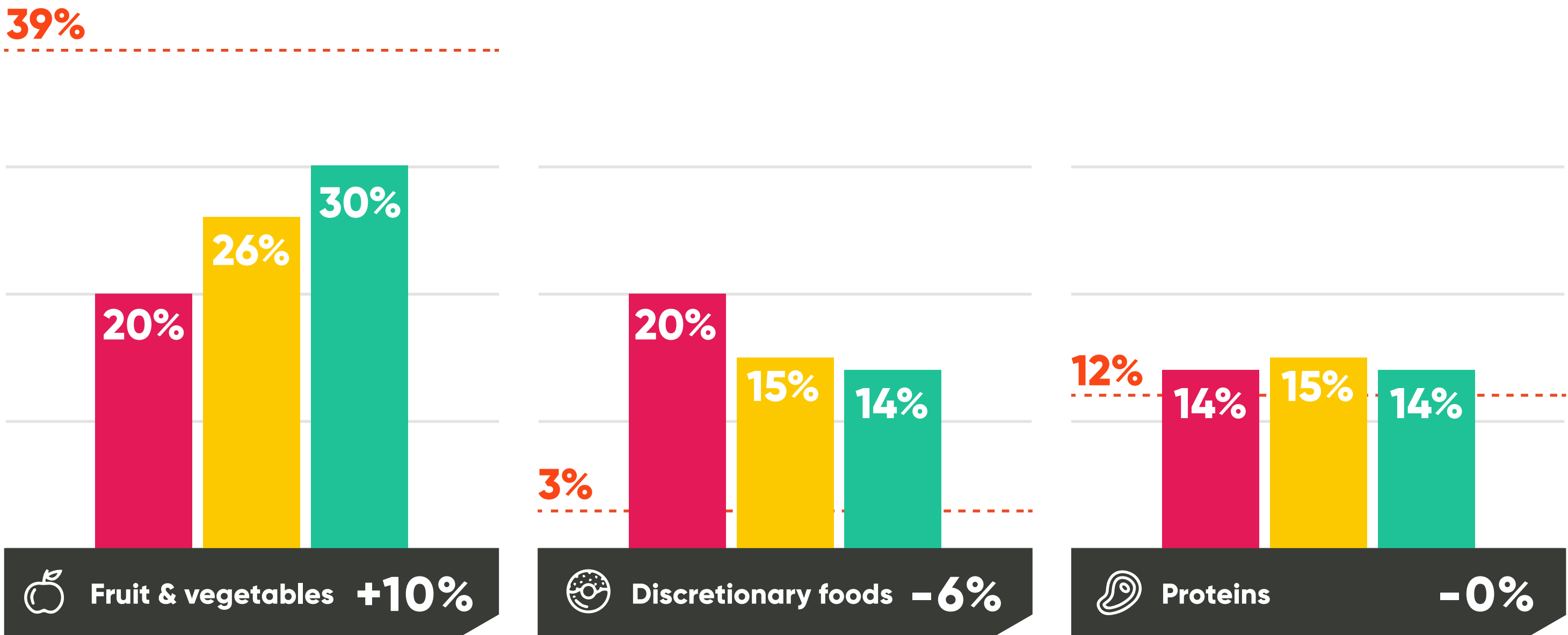
- Engaged shoppers bought more fruits and vegetables after the trial in 2021
- This appears to have increased the amount of fibre in baskets. To meet government recommendations, the UK needs to boost fibre intakes by over 60% so this is a positive outcome

3. During the trial, diets shifted towards the Eatwell Guide, and some behaviour was sustained

Shoppers who went on to engage with the trial were already purchasing a higher proportion of fruit and vegetables than those who did not. The promotion caused engaged shoppers to shift even further towards the Eatwell Guide, although there is still room for improvement.

- Eatwell target
- Not engaged customers 2020
- Engaged customers 2020
- Baskets containing a promoted product 2020

Purchasing habits compared to the Eatwell Guide



Chapter 4

Recommendations for Industry

Health from IGD



Incentives work to change behaviour

Levers related to this recommendation : ⑆ Incentivisation

Perceived cost is the main barrier to healthy, sustainable diets and this is likely to become increasingly important with the evolving cost-of-living crisis.

Trials on Healthy Start top-up vouchers and **incentivisation** of fruit and vegetables showed that this behaviour change lever can be impactful when driving change both in the short and long term. However incentivising healthier and more sustainable options may not be economically viable for industry in the long term.

Interestingly the low-price promotion within the 60p fruit and vegetable trial became less impactful over time. It is possible therefore that rotating short-term promotions will

be more appealing to shoppers than a consistently low price, especially if supporting these promotions with **placement** and **signposting**.

The trial with ASDA did not use incentivisation, and the price difference of plant-based meat alternatives appears to be one barrier to shifting behaviour. Future trials could look to incentivise these products or ensure that their prices reflect their meat counterparts. Some retailers have actively reduced or removed price discrepancies to make switching easier.

Conclusion: Price is a useful tool to shift consumer behaviour, but change is not always sustained.



Maximise the impact of product placement with signposting

Levers related to this recommendation : 📍 Placement ➡ Signposting

Where products are ranged in a store can powerfully impact what people choose to buy.

In the 60p fruit and vegetable trial, using prominent placement in combination with clear signposting on posters and point-of-sale marketing resulted in portions sold increasing by 78%.

In the plant-based placement trial, moving plant-based products out of a designated bay and therefore losing the strong point of sale communication and bright green branding resulted in significantly reduced sales.

Whilst more research is needed, these two trials suggest that using the levers of placement and signposting in combination can grab the attention of shoppers and promote healthier choices.

With many stores around the country changing their layouts this October to meet restrictions on the placement of foods high in fat, salt and sugar, there is now an opportunity to repurpose premium space and ensure that healthier and more sustainable products are easy to find.



Personalise your intervention

Levers related to this recommendation are :

£ Incentivisation 📍 Placement ➡ Signposting 🛒 Product 👤 Influence

We have learnt that interventions fare differently in retail and out-of-home settings, and they also have different impacts on different demographic groups.

The trial on boosting the value of Healthy Start vouchers was the only trial in this report targeted towards supporting a single demographic group; specifically low-income families. This was also the only trial that delivered long-term behaviour change after the trial had stopped.

Whilst more research is needed, this could suggest that targeted interventions are more likely to drive sustained behaviour change.

With the advancement of technology and online retailing, there are increasing opportunities to personalise interventions and position interventions positively as personal rewards rather than required support.



Get involved and share your findings

It's important to share what works and what doesn't across industry. Getting involved in trials on behaviour change could ensure future industry activity is founded on science and is likely to generate positive social impact.

1

Join us

- Work with us to trial real-life solutions and inspire others
- Tell us about your success stories

2

Visit our 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