

Healthy, Sustainable Diets: Driving Change

Together with industry,
we are helping shift
consumer behaviours

Social Impact from **IGD**



Making healthy, sustainable diets easy and accessible for everyone



Obesity is one of the biggest health problems this country faces. Just 1% of the UK population currently meets government healthy eating guidance.¹

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

Large-scale consumer behaviour change is not easy; people rarely do what they say they will, and they certainly don't 'do what they are told to do'.

To find out what truly drives long-term behaviour change, IGD has joined forces with leading retailers, manufacturers and researchers at the University of Leeds, to put theory into practice through a series of real-life behaviour change trials, reaching millions of consumers.

This report explores our initial findings, specifically what consumers say and what they do when we make fruit and vegetables more accessible at the point of sale. Already, we see a positive impact from nudge tactics, pricing and product placement; and in 2022, we will share outcomes from further trials that are underway with several UK retailers.

This is a hugely exciting project, demonstrating the genuine opportunity our industry has to make healthy and sustainable diets easier and more accessible for everyone.

Please use this report to drive a change in approach in your organisation and work with us as we trial real-life solutions to inspire others across our industry.

Susan Barratt, CEO, IGD

Executive Summary

Driving change

How we produce and consume food in the UK negatively impacts our own health and that of the planet¹. Less than 1% of the UK population meet the Government’s Eatwell Guide, but evidence shows that we would live longer and more sustainably if we did².

With increasing interest from consumers and policy makers, we have an opportunity to collectively make healthy, sustainable diets easier and more accessible for all.

Understanding consumers

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

Together with our industry working group and the University of Leeds, we’re turning theory into action by trialing these levers in real-life settings with millions of consumers.

Initial findings and future trials

Our first trial shows that applying three behavioural levers impacts sales of many fruits and vegetables, and increases the range of products in a basket.

However, the trial only delivered strong short-term results and so more testing is needed to understand how to create a sustained change.

IGD has further trials in progress with five major retailers in the UK. In 2022, we will make practical recommendations for industry to drive long-lasting dietary change.

The five levers



1. <https://www.gov.uk/government/publications/health-matters-obesity-and-the-food-environment/health-matters-obesity-and-the-food-environment--2>.
2. [EAT Lancet \(2019\)](#)

Contents

- 5** / The case for healthy, sustainable diets
- 9** / Working with industry to drive positive change
- 12** / Findings from our first trial



The case for healthy, sustainable diets

Social Impact from IGD



What we eat and drink is impacting our health and the planet¹

UK Government guidance, the Eatwell Guide, sets a good direction of travel for how our diets can be better for our health and the planet

Benefits of following The Eatwell Guide⁶

- ▼ 31% GHG emissions
- ▼ 34% land use
- ▼ 17% water use
- ▲ 17.9m years of healthy life



Health challenges

Current diets are fueling obesity, type 2 diabetes, heart disease, and some cancers¹.

Two thirds of UK adults are above a healthy weight² and childhood obesity has doubled in 30 years³.

Obesity disproportionately affects children living in deprived areas and some ethnic minority groups³.

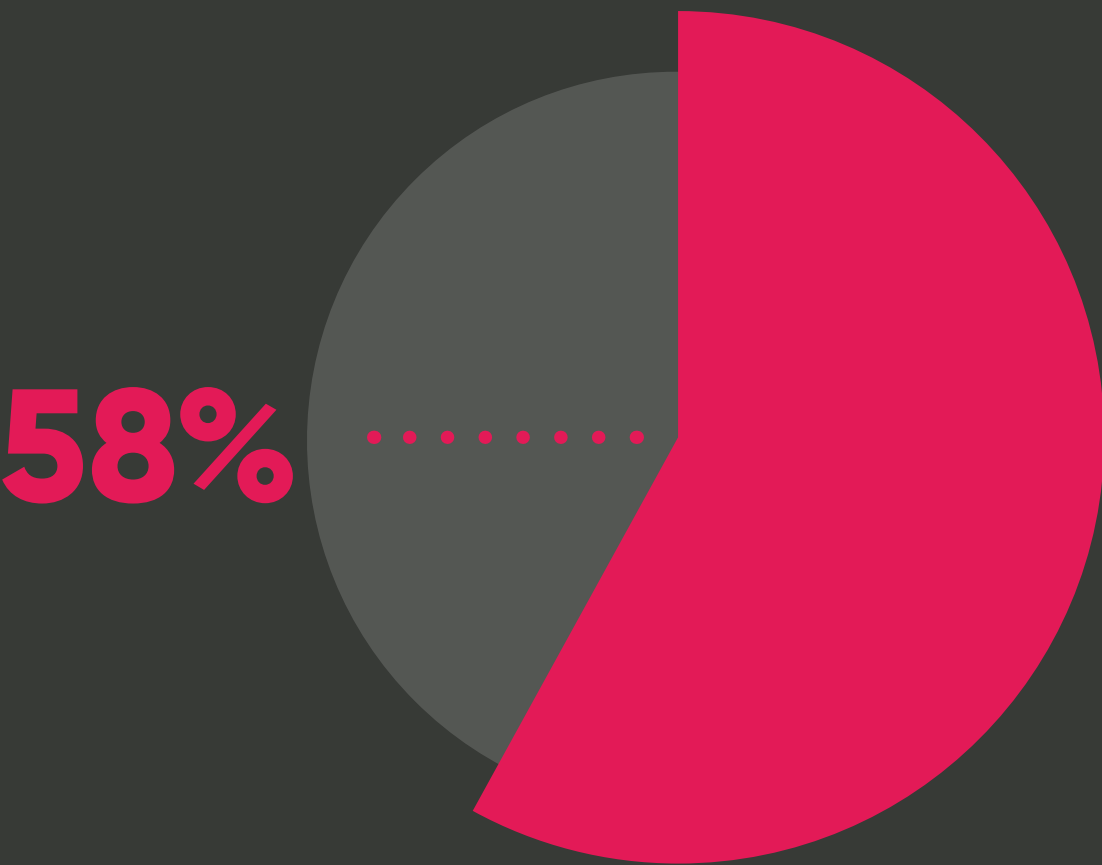
Environmental challenges

Up to one third of carbon emissions and 70% of freshwater use is for agriculture⁴.

Meat and dairy make up a third of the calories we eat, yet 85% of UK farmland is used for feeding and rearing livestock⁵.

1. BDA (2020 update), One Blue Dot 2. NHS Digital (2020) Statistics on Obesity, Physical Activity and Diet, England, 2020 3. Dame Sally Davies (2019) Time to Solve Childhood Obesity. An Independent Report by the Chief Medical Officer 4. EAT Lancet (2019) 5. National Food Strategy (2021) 6. The Carbon Trust (2016) The Eatwell Guide: Modelling the Health Implications of Incorporating New Sugar and Fibre Guidelines

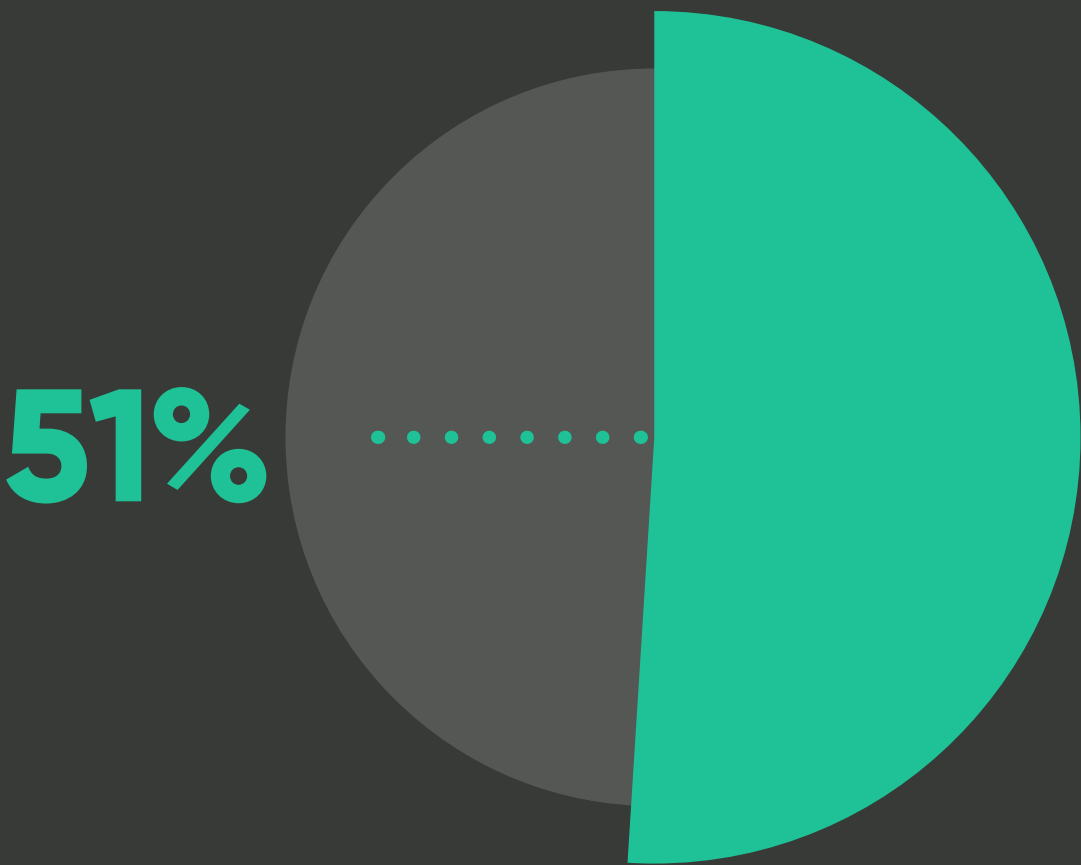
Shoppers increasingly want help to eat healthy, sustainable diets



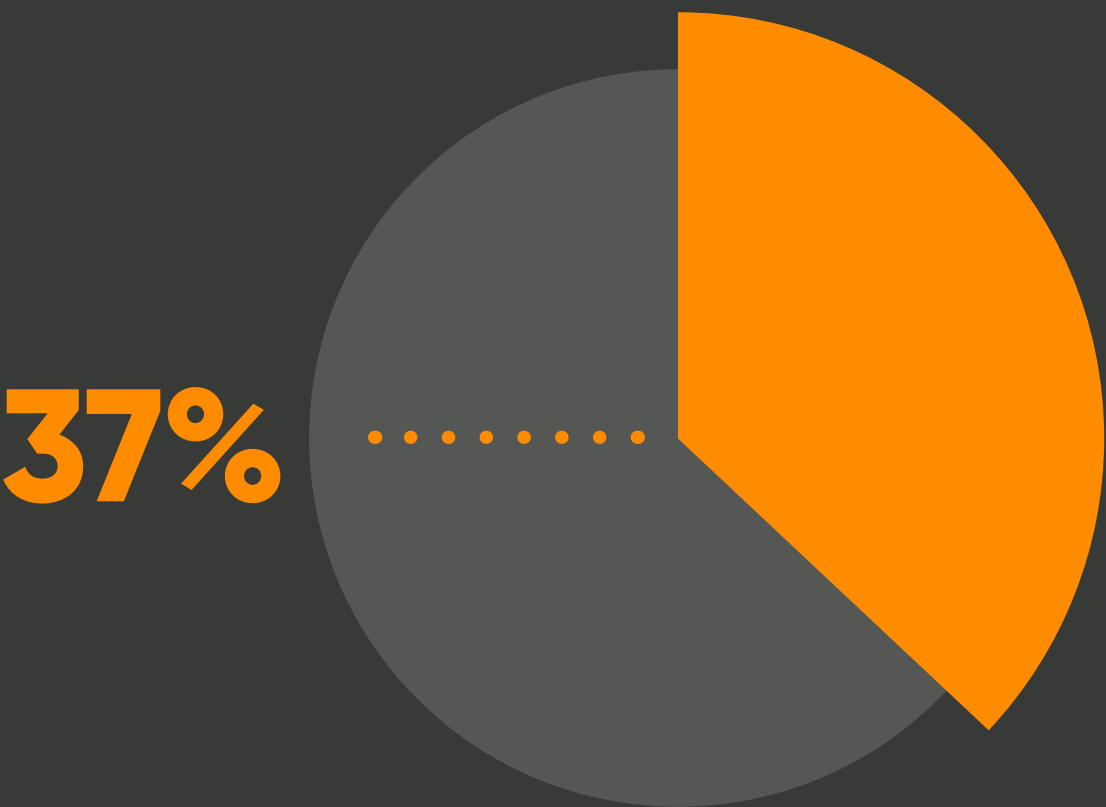
There is a significant Appetite for Change.

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

This is consistent over three years.



Over half of people told us they ate fruit and vegetables more often during lockdown, highlighting an opportunity to continue healthy habits.



Cost is the main barrier to change.

37% perceive healthy, sustainable eating to be more expensive.

The opportunity



Taking action on health and sustainability builds trust and brand reputation. It has also been shown to drive sales.

- Sales of meat-free products increased 40% between 2014 and 2019¹
- Sainsbury's achieved a 387% rise in sales of fruit by partnering with Disney²
- Tesco found two thirds of shoppers purchased more fruit and veg when offered free fruit in store³
- Pret-A-Manger show that plant-based is 'not just for veggies' as 80% of their products are vegetarian or vegan⁴

Working with industry to drive positive change

Social Impact from IGD



IGD has established an industry project group to drive change

We will collaboratively identify and test strategies to help shift consumers towards affordable, healthier and more sustainable diets.

Our partners



"We know that many shoppers want to enjoy a healthier and more sustainable diet, and retailers can play a key role in helping them to do so.

This collaboration brings together experts from across the industry to find the most effective ways to help customers make more informed choices."

Joanne Lunn, Health Manager, Waitrose

Together we're turning theory into action



Together with many **leading retailers** and **manufacturers** we're putting theory into practice.

Our research partners – **The University of Leeds** – measure the impact of trials on shopper baskets, in the short and long-term.

With five trials already underway across the nation, we're already reaching **millions of people**, across different demographics.

With learnings from these and future trials, we will recommend how industry can effectively shift consumer behaviour towards healthy and sustainable diets.



UNIVERSITY OF LEEDS



Findings from our first trial

Social Impact from IGD



Our first trial

Hypothesis: reducing the price of fruit and vegetables to 60p in stores across the country, for four weeks, should increase the portions* and variety of products purchased



"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 is the trial and who does it target?

Sainsbury's reduced the price of various fruit and vegetables to 60p, throughout January, for two consecutive years. In addition they've supported this with premium placement and an advertising campaign.

Implemented online and in larger stores across the country, the trial impacts multiple regions and demographics.

With over **20 million transactions each week across the UK**, this is a prime setting to test interventions*.

- ▶ Using sales data, we measure the amount and variety of fruit and vegetables purchased before, during and after the intervention
- ▶ We review the whole transaction; overlaying nutrition information, HFSS** score and Eatwell Guide category data, to understand impact on the wider basket
- ▶ Using anonymised customer data we link future transactions, to see if the promoted products are purchased again in the year after an intervention and whether this impacts the basket
- ▶ Insights into demographics and transaction type allows us to identify trends and opportunities

As most shoppers purchase from multiple food and grocery stores each month, these results represent Sainsbury's shopper baskets and not an individual's entire diet¹.



by Sainsbury's Ripe & Ready Medium Avocado, 60p. Selected stores, subject to availability. [sainsbury.co.uk](https://www.sainsbury.co.uk) Recipe suggestion

Leveraging incentivisation, placement and signposting

This trial applied three behavioural levers



Incentivisation

37% of consumers say that cost is a barrier to them eating a healthy, sustainable diet¹.

Therefore, 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, as does dual siting².

This campaign gave prominent placement to promoted fruit and vegetables.

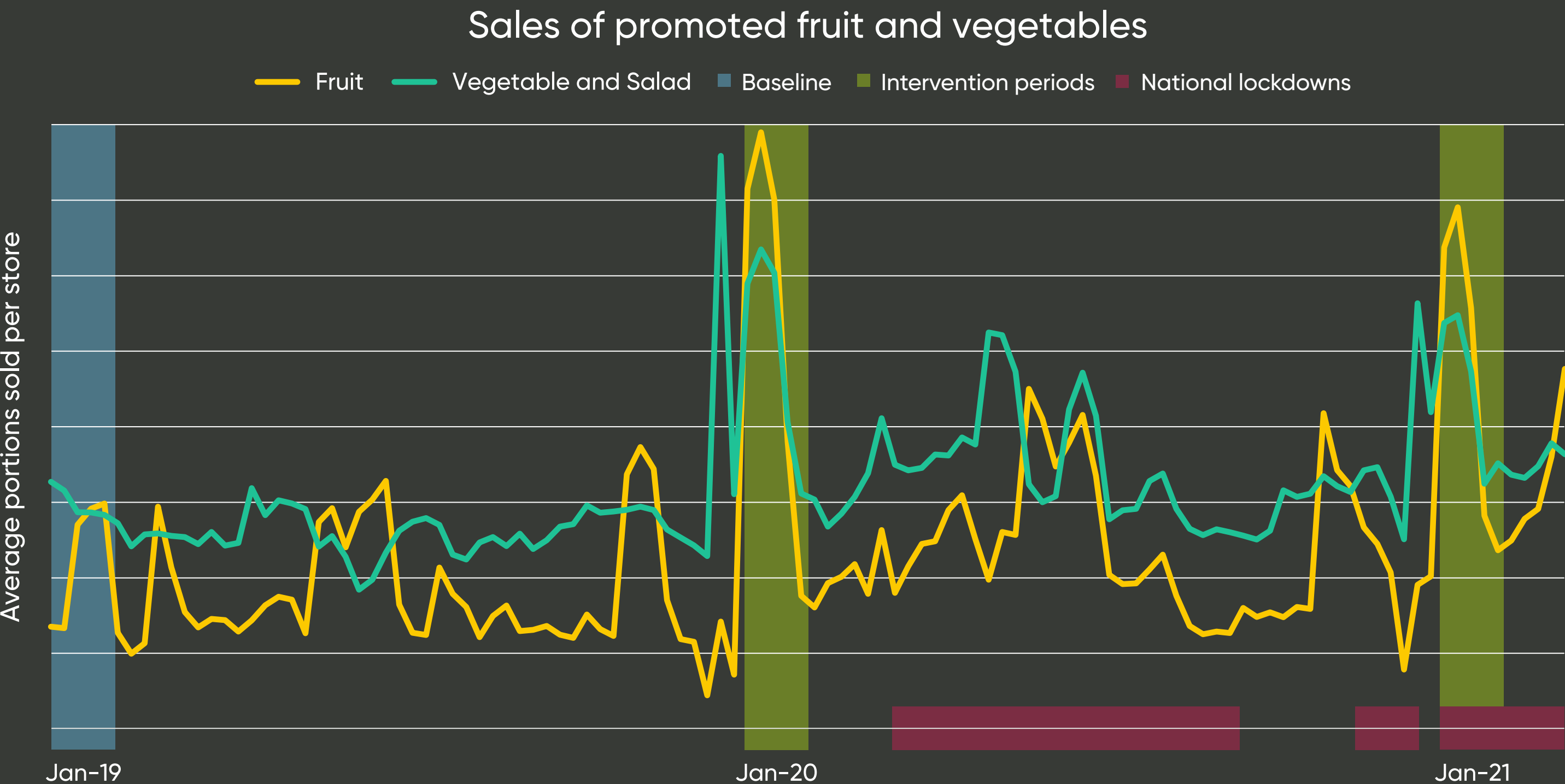


Signposting

Health is the biggest driver for changing diets, and taste can be a barrier¹.

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.

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



Looking across three years, the 60p fruit and vegetable intervention creates 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.

The intervention increased sales of promoted fruit and vegetables, despite a national lockdown

In January 2020 (pre-pandemic) an additional 2.8 million portions of promoted fruit and vegetables were sold online and in stores which ran the promotion. In January 2021 an additional 2.1 million portions were sold, compared to the January 2019 baseline.

There are two major factors at play here:

1. Thirteen products were offered on promotion in 2020, seven were offered in 2021
2. The January 2021 intervention coincided with the third COVID-19 national lockdown, where the country was urged to stay at home

During this period, shopping habits changed, with many visiting stores less frequently. This could have reduced the impact of placement and signposting on shopper behaviour.



Sales declined after the intervention period, but remained above baseline levels

When the promotion stopped, sales declined rapidly, especially for fruit. However, when the intervention was run a second time, this decline was less pronounced.

It is difficult to conclude what caused the decline as many factors can impact choice. For example, signposting or placement may only interrupt behaviour for a short time.

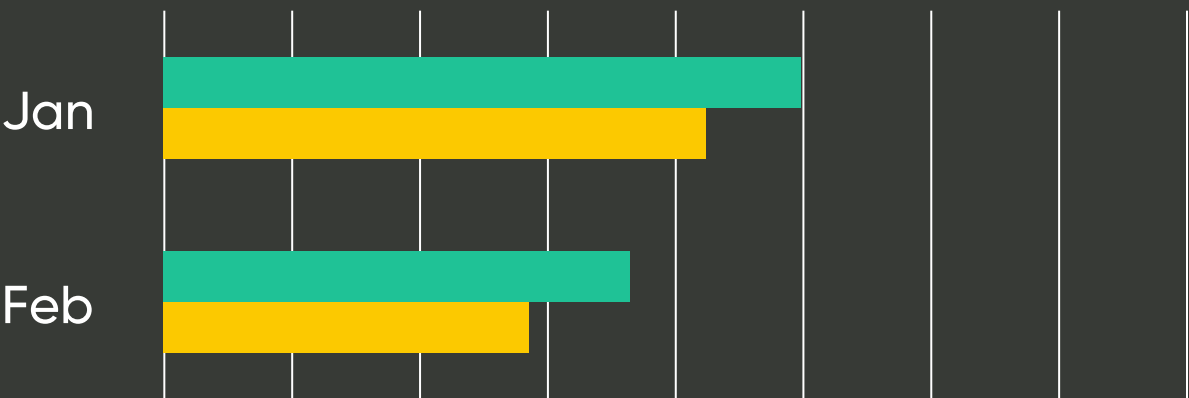
To investigate this further, we will analyse whether over the course of 2021 people continue to buy promoted fruit and vegetables, and the impact of this on the wider basket to understand whether the impact was sustained.



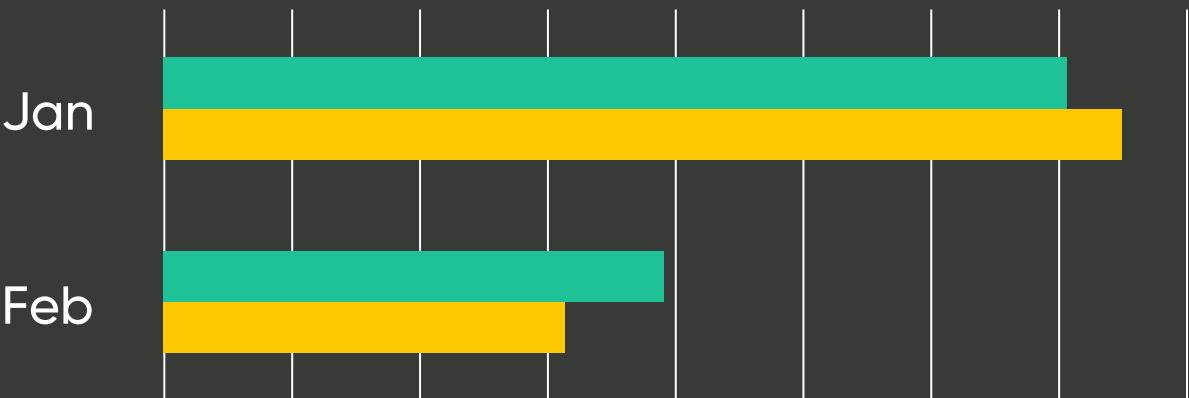
Average portions of promoted fruit and vegetables sold per store

2019

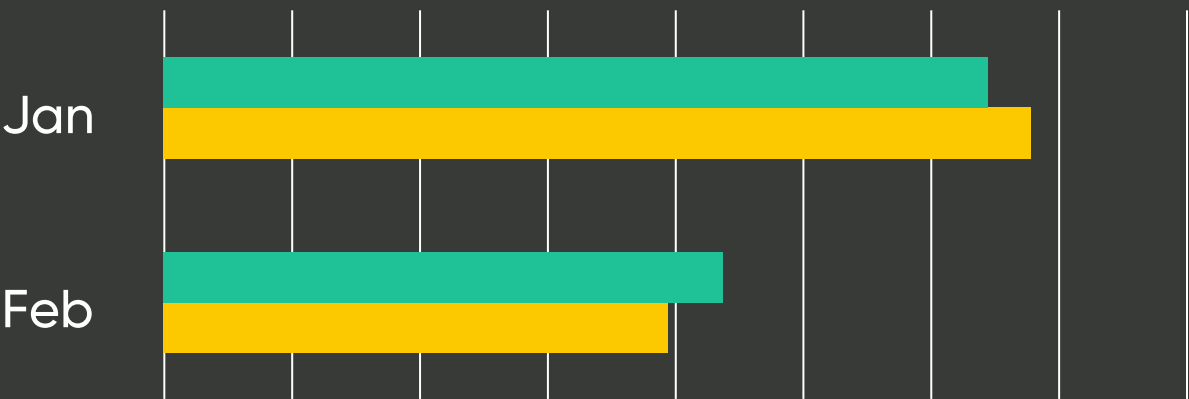
Fruit Vegetables and Salad



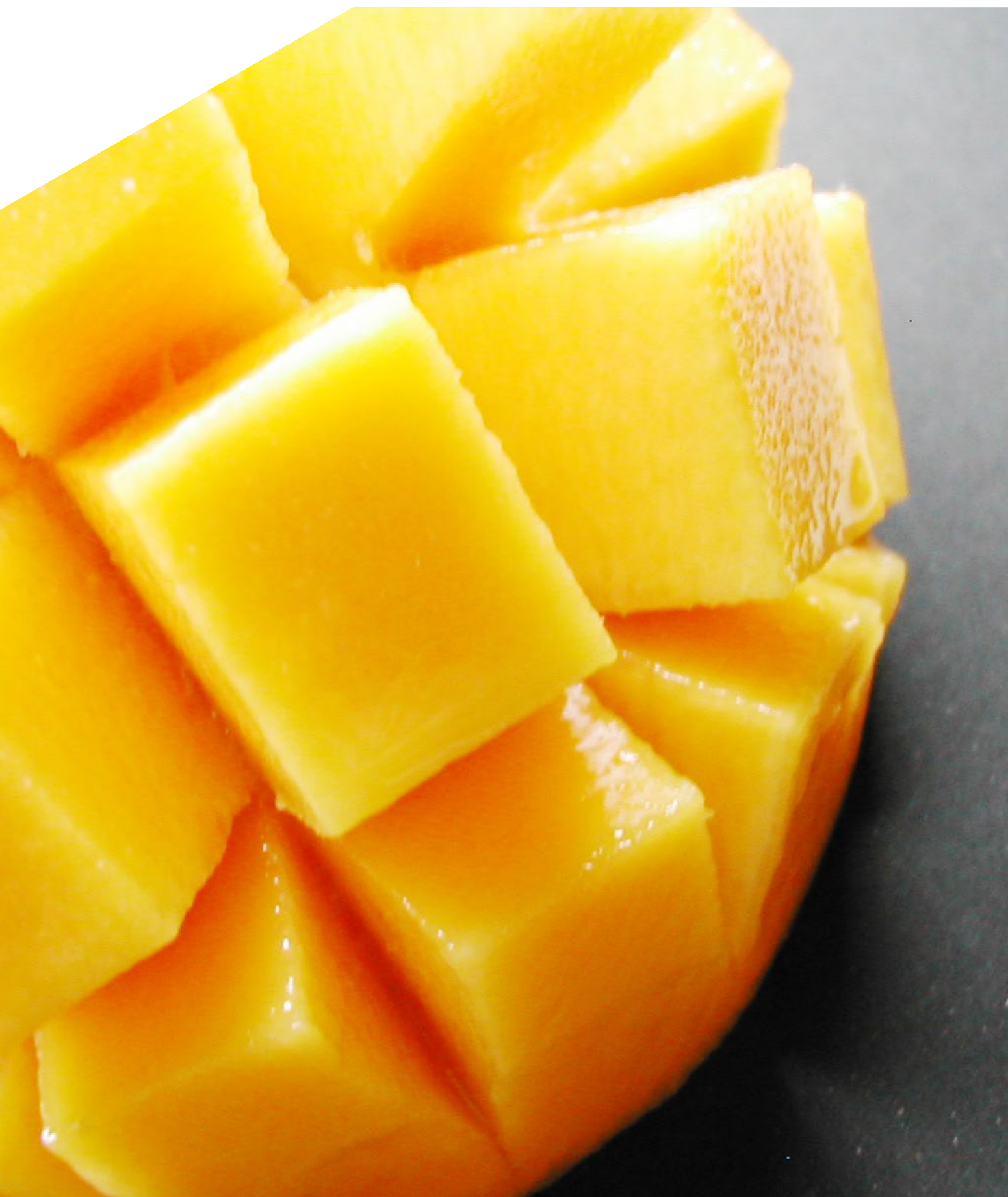
2020



2021



Higher value items performed better



For higher value and exotic fruit items, the promotion generated a greater sales uplift. But not all promoted fruit and vegetables became more appealing to customers, shown in the diagram to the right.

Sales of swedes did not increase above the baseline whilst they were on promotion in either year, showing that incentivising them at 60p and giving them prominent placement did not make them more appealing to customers.

Our Appetite for Change¹ research showed that whilst cost is the biggest barrier to a healthy, sustainable diet; other barriers such as taste, trying something new and knowing how to cook are also important.

Units purchased above baseline varied by product



The intervention impacted fruit and vegetable sales, beyond those on offer

During the intervention period, category wide sales increased

Sales uplift was seen not only on promoted products, but also on fruit and vegetables outside of the promotion.

We recognise that in January consumers are more health conscious and that is reflected by total fruit and vegetable sales being 29% higher than in February 2020.

However, promoted items made up a higher proportion of sales during the intervention period so it is possible that using signposting and placement to support the 60p fruit and vegetable activation contributed to wider category sales by attracting customers into the fruit and vegetable aisles.



Key findings

- ▶ The intervention increased portions of promoted fruit and vegetables sold by 78%
- ▶ Repeating the intervention increased sales, despite a national lockdown
- ▶ Further research is underway to see if behaviour was sustained
- ▶ Impact was not consistent across promoted products. Higher value items performed better
- ▶ During the intervention period, category wide sales increased
- ▶ The combination of incentivisation, placement and signposting delivered strong short-term results, but not significant long-term change

We need to test further combinations of levers to understand what drives a sustained shift.

4.9m

**Additional portions sold,
across both interventions**

Next steps for this trial

In 2022, we will report on whether consumers continued to eat a greater variety of fruit and vegetables in the year after the trial.

We will report on how the promotion impacted baskets and whether wider baskets shifted towards healthier, more sustainable diets.

Our future trials

We have large-scale trials currently planned and underway with five major UK retailers.

We are looking at what combination of behavioural levers will help to drive long-term behaviour change amongst UK consumers. We look forward to sharing our findings and recommendations with industry.

As sustainability data becomes increasingly accurate and available this will be integrated into future trials.

To work with us, trial real-life solutions and inspire others, get in touch at: healthyeating@igd.com



"I love the collaborative nature of this project – it's both ambitious and bold. The goal of supporting retailers and manufacturers to trial interventions on behaviour change with expert data analysis is challenging but necessary to improve the health of our people and our planet. We are excited to be part of it."

Beth Fowler, Nutrition & Health Manager, Asda



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

Social Impact from **IGD**