



# Appetite for Change

Understanding how to shift consumer behaviour towards healthy and sustainable diets

## FULL RESEARCH FINDINGS



# Foreword



Our food system sustains us, nourishes us and supports our health and wellbeing, encompassing what we grow and how we grow it, what we eat and how we eat it.

It's adapted and thrived throughout world wars, the industrial revolution and recent population growth. The UK has developed a world-class food supply chain. However, we produce, consume and waste more food than ever before and both the health of the nation and the future security of our environment are at risk.

Sustaining ourselves for the future will require significant shifts in how the food system currently operates and delivers. It's complex, emotive and contentious. Our national dietary guidelines (The Eatwell Guide) provide a useful direction of travel although as a nation we are a long way from meeting this guidance. The

real opportunity comes from changing diets; if we empower and enable consumers, they will help drive change that is required.

Extensive studies have shown that education alone will not change behaviour<sup>1</sup>, so we've collaborated with behaviour change experts and a wide range of stakeholders from across the food system to understand how, together, we can advocate and nudge consumers on this journey. The scale of this change could be phenomenal: our research found that 66% of people in the UK are open to making changes to what they eat and drink.

This new report outlines the key opportunities to start shifting people's behaviour and recommends next steps for your business to act. We know that healthy, sustainable and affordable food is at the heart of government thinking. This year will see publication of the National Food Strategy<sup>2</sup> - the first independent review of our nation's entire food system for 75 years. We all have a role to play, but our impact will be much greater if we come together to drive the change required.

I look forward to embracing these new opportunities together. Get in touch to get involved.

**Susan Barratt**  
CEO, IGD



# Key findings

There are three core findings from our research. They highlight opportunities to support consumers in making better choices for improved health and sustainability outcomes:

1

## There's significant appetite for change

66%

of people are thinking about or already changing their diets, and they want help to do it.

2

## Consumers are confused

Most consumers overestimate how healthy and sustainable their diets already are. They rate themselves...

6.3/10

...for achieving a healthy and sustainable diet.

Although many understand the principles of a balanced diet, what we put on our plates doesn't reflect this.

3

## Change is possible, but it needs to be easy and targeted

This is a tale of three different mindsets;

1. those who are making changes to their diets to be healthier and more sustainable
2. those who are thinking about it
3. those who see no reason to change

Health is the primary driver for most, but concern for the environment is growing, especially among younger consumers.

There are practical steps, targeted for each mindset, that we can take to shift consumer behaviours towards healthy and sustainable diets.

# Contents

## How to use this guide

This guide has been created as a catalyst to drive discussion and action around healthy and sustainable diets.

Our consumer research shows that there are practical solutions, underpinned by rigorous research that we can act on now.

This is our full consumer research report, discussing our methodology, qualitative and quantitative research and next steps for action.

If you are time pressed, our [summary report](#) shares the top-line insights.

## What you can do within your organisation

Use our research to shape your strategy, understand which mindset your shoppers and consumers are in, and use our behaviour change model to identify the most relevant solutions.

## What we can do together

Continue to build our knowledge of healthy and sustainable diets, test practical interventions in real-life settings to drive positive change, and keep this important topic high on our agenda.

## Stay connected

There is a need for more research in this area. We are keen to bring industry and academia together to identify the most effective interventions within real world settings.

Get in touch by emailing: [healthyeating@igd.com](mailto:healthyeating@igd.com)





# Setting the scene

# Sustainable food systems are broad and complex

As a nation and a planet we face a significant public health and environmental challenge<sup>3-7</sup>.

There is increasing focus on the role of the food we produce, consume and waste as part of this debate, and there is now overwhelming evidence that current diets are impacting the planet: without change food security is at risk for future generations.

The challenge in promoting both healthy and sustainable consumption is that food systems are incredibly complex. Focus areas span production methods, land use, transport and food waste to name a few. There is a real need to build on the existing evidence base. But there is a real urgency to act too – so where do we start?

Changing what we eat and drink can make a big difference to the health of the population and the planet. Unhealthy diets are the leading cause of ill health worldwide<sup>8</sup> and there is growing awareness of the impact our food choices are having on the planet. Substantial scientific evidence links healthy diets and environmental sustainability.

Through this project, we've sought to understand the consumer perspective on transitioning towards healthy and sustainable diets:

- What does 'healthy and sustainable' mean for UK consumers?
- What is the appetite for change?
- What are the practical steps that food retailers, manufacturers and foodservice providers can take to facilitate this transition?

Our aim is to inspire our whole industry to engage in this transition through evidence-based and consumer focused practical solutions, underpinned by rigorous research, that we can get on with now.



# Substantial scientific evidence links healthy diets and environmental sustainability

Various models illustrate what a healthy and sustainable diet could look like, but a consistent definition is yet to be agreed<sup>3-7,9</sup>.

**However, all these models share broad principles. These principles were used to underpin our research:**

- Increasing the proportion of foods coming from plant-based sources (e.g. fruit, vegetables, nuts, wholegrain starchy carbohydrates, beans, pulses)
- Reducing meat and dairy (especially red and processed meat)
- Reducing foods high in fat, salt and sugar

For now, our national dietary guidelines (The Eatwell Guide<sup>9</sup>) provide a useful direction of travel and are underpinned by both healthy and sustainable principles.

However, we're a long way from meeting this guidance, with only around 1% of the population currently eating a diet that reflects the recommendations<sup>10</sup>. Furthermore, many experts believe the model does not go far enough from an environmental perspective.

We know there is a gap between intent and action, so we have used behaviour change science to underpin our research findings.





# How we approached this research





# Our methodology

Our approach has been collaborative and comprehensive, combining qualitative and quantitative research with extensive engagement with stakeholders across the food system (industry, academia, government, NGOs).

A review of the literature and meetings with industry in 2019 demonstrated the need for change, but highlighted that few practical solutions had been established.

## Qualitative

- An online community of 24 people, kept a 7-day food diary and answered daily questions about their eating habits
- Focus groups with a further 36 people, built deeper understanding of what healthy and sustainable means and how open they are to changing their diets
- Different attitudes to change and potential solutions emerged, which we wanted to test with a larger quantitative sample

## Quantitative

- We undertook a survey of 1,000 nationally representative consumers to further quantify attitudes and opportunities
- Reaction time testing was used to test conscious and subconscious reactions to stimulus and communication. This identifies solutions that promote or nudge a transition towards healthy and sustainable diets. This testing demonstrates the gap between intent and action, and the strength of different approaches

## Stakeholder workshops

- Throughout this process we adopted a collaborative approach, with industry and non-industry stakeholders, running multiple workshops to gain input into the research design and help interpret the findings into actionable solutions

### Review & briefing

Review of existing literature, media and industry conversations.



### Online community

A digital 7-day food diary and contextual questions with 24 people.



### Stakeholder workshop

Workshop with food system stakeholders to shape the research.



### Focus groups

6 focus groups conducted in London and Leeds (36 people).



### Quant online survey

Nationally representative online quantitative survey with 1,000 UK consumers.



### Stakeholder workshop

Workshop with food system stakeholders to identify next steps.

# Research based on behaviour science

As humans, we don't always make rational decisions. Food can be especially emotive and is often a source of pleasure.

This means our decisions and eating habits are often hard to understand.

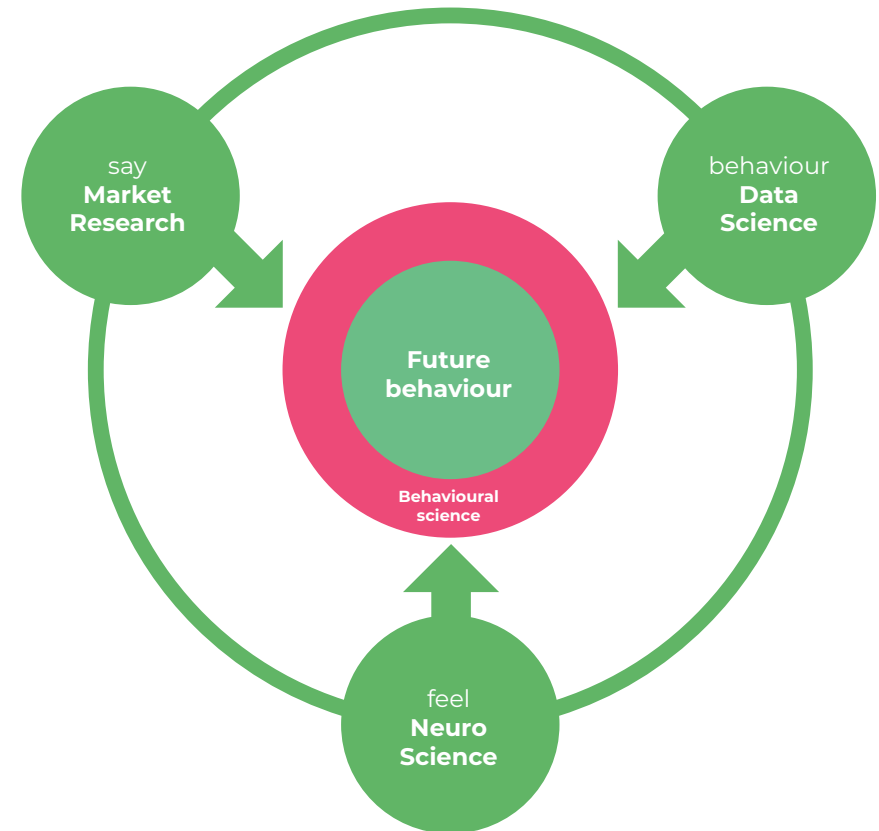
To get under the skin of how we can influence consumer behaviour, we have partnered with Walnut Unlimited, specialists in behavior science. Walnut apply this specialist knowledge to all their research in order to better understand people and why they really do what they do.

- What motivates, and what doesn't?
- How do they feel about the world around them?
- How does that influence their decisions and behaviour?

By applying a behaviour science lens to this research, which involves over 1,000 consumers, we've gained a deeper understanding of the conscious and subconscious drivers behind consumer decisions.

From this, we've identified opportunities for food retailers, manufacturers, and foodservice to promote behaviour change.

This behavioural approach is increasingly used by government, academia, NGOs and leading businesses.



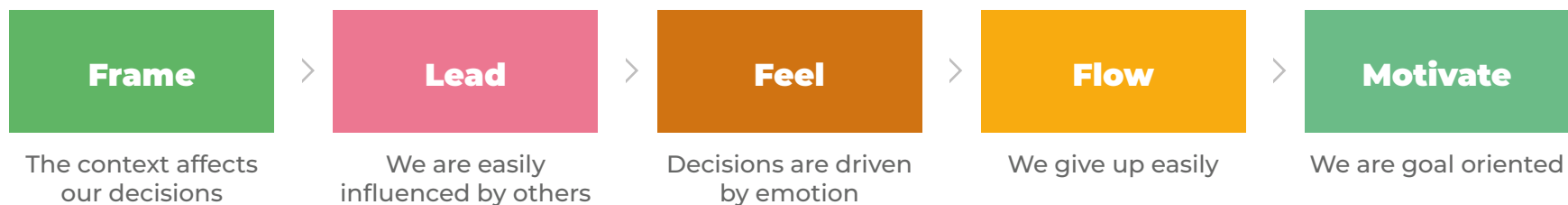


# The behaviour science framework

One barrier to using behaviour science in research is that it's complex and there are many cognitive biases to learn.

To simplify this and help bridge academia and the commercial world, Walnut has developed a simple framework which we have applied throughout our research. It brings together 5 key shortcuts that our brains use when making decisions.

The 5 shortcuts are based on principles from behavioural economics, psychology and the social sciences.



## Frame

### How are the options presented?

#### Framing losses

How choices are presented, whether it be as a loss or as a potential gain affects the choices we make.

Actively marketing only diet varieties of soft drinks has been shown to make them more appealing than the regular varieties.

Framing the healthier choice as positive, not as missing out, will help shift purchasing.

## Lead

### Are there any social influences present?

#### Social Proof

People use the behaviour and attitudes of others to influence their own.

Products with higher online ratings are more appealing than those with a low weighting.

People give weight to customer reviews and testimonials. They give even more weight to the review of a friend or family member.

## Feel

### What are the emotions evoked?

#### Loss aversion

The pain of losing looms much longer than the joy of a gain of equivalent value.

A 10p carrier bag charge is significantly more successful for reducing plastic than a 10p discount for bringing your own bag.

We try harder to avoid losses than to receive gains of equal value.

## Flow

### How easy is it to understand and to action?

#### Chunk and sequence

Information grouped into familiar, manageable units is more easily processed and remembered. We are more likely to take action when complex activities are broken down into smaller tasks.

Inspiring people to give up meat each Monday and providing recipes to do so feels more manageable.

We find it easier to take small, defined and sequenced tasks.

## Motivate

### Is there anything that motivates to do it again?

#### Feedback Loops

We are motivated when we see how our actions modify subsequent results.

A product claim '20p from your purchase will benefit a local charity' can encourage purchase.

We are motivated when we see how our actions create subsequent results.





**Consumers  
are confused**



# What does healthy eating mean to consumers?

We're exposed to a huge amount of information on healthy eating. Whilst this information can sometimes be confusing, our focus groups found that most people can describe a healthy diet.

To most a healthy diet revolves around balance.

## What does balance mean to consumers?

- Varied diets with different food groups
- Offsetting less healthy days with healthier days
- Treating themselves

## Do health and sustainability align?

There is growing awareness of the need to increase plant-based foods and reduce red and processed meat.

### Watch out

There is a wealth of research linking healthy and sustainable foods, but the consumer assumption that plant-based meals are automatically healthy is not always correct. There are both healthy and unhealthy plant-based options available to buy and cook.





# Consumer understanding is aligned with the academic principles for healthy and sustainable diets

People understand the need to evolve their diets so they are healthier. In our research they were able to describe the broad principles of healthy and sustainable diets.

## Academic literature

There is widely accepted evidence that articulates the principles of healthy and sustainable diets:

Increase the proportion of foods coming from plant-based sources (e.g. fruit, veg, nuts, wholegrain starchy carbohydrates, beans, pulses)

Reduce meat and dairy consumption (especially red and processed meat)

Reduce foods high in fat, salt and/or sugar

## Consumer research

Why do you feel your current diet is not healthy and sustainable?

“Too much convenience food and not enough veg currently”  
*Male, 51*

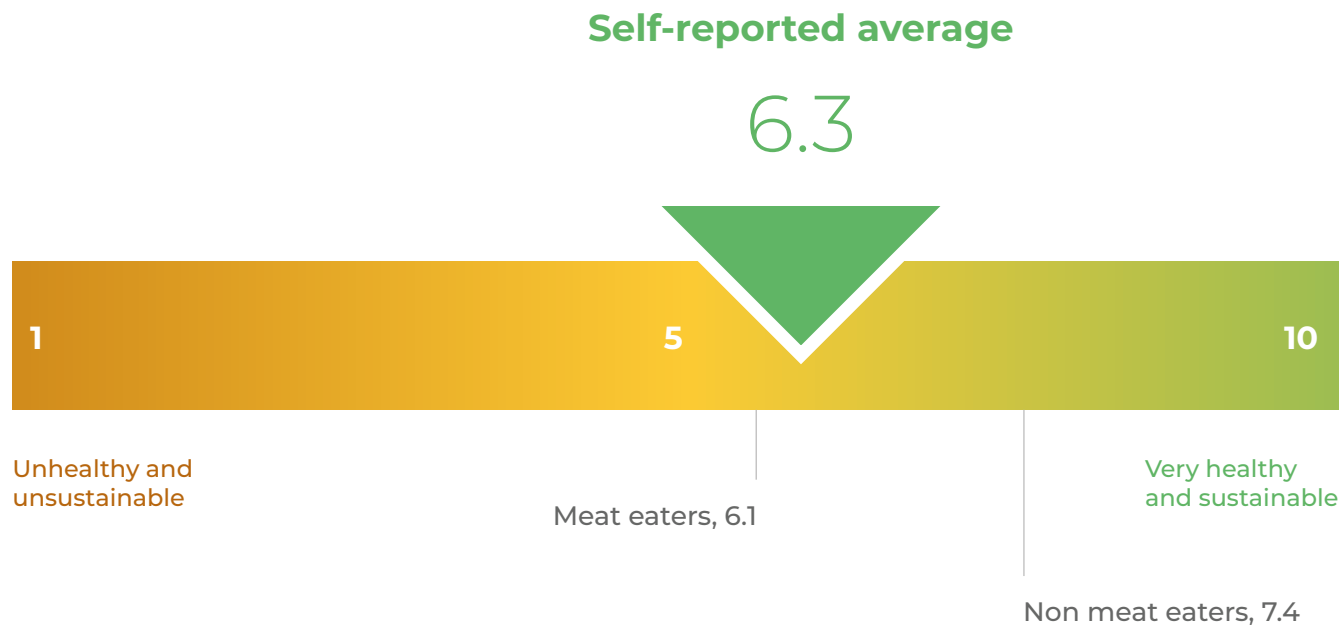
“Too much processed meat, non-organic products, lots of packaging involved.”  
*Male, 32*

“More processed foods than fresh foods.”  
*Male, 33*

# Most people see their own diets positively

Very few people have a diet that is reflective of government guidelines and therefore you might expect most consumers to rate their diets negatively.

However, when asked 'how healthy and sustainable would you say your current everyday eating habits are?' the self-reported average was 6.3 / 10, suggesting that many consumers view their diets positively and overestimate how healthy and sustainable they are. Vegans, vegetarians, and pescatarians perceive themselves as having healthier and more sustainable diets than meat eaters.



## Overconfidence bias

People tend to be more confident in their own abilities and overestimate their performance compared to the average.

# What activities are associated with how healthy and sustainable people think they are?

Self reported diet score

## Rating 1-4

(17% of all consumers)

Consumers in this group claim to undertake activities such as reducing alcohol intake to improve their health. They are more likely to be male and are often not solely responsible for the food shop. They are often in a lower socioeconomic group (C2DEs).

- 45% are increasing how many meals they cook from scratch
- 10% are cutting out or significantly reducing intake of meat
- 6% are cutting out or significantly reducing dairy consumption

## Rating 5-7

(57% of all consumers)

Consumers in this group are more likely to be increasing fruit and vegetable consumption, reducing their sugar consumption and cooking more from scratch. They are more likely to be in a higher socioeconomic group (ABC1s).

- 59% are increasing how many meals they cook from scratch
- 58% are increasing intake of fruit and vegetables
- 48% are eating fewer high sugar products

## Rating 8-10

(26% of all consumers)

Consumers in this group are more likely to be reducing their meat and dairy intake, increasing consumption of wholegrains, and increasing their intake of plant-based meat alternatives.

- 42% are increasing intake of plant-based foods
- 39% are cutting out or significantly reducing intake of meat
- 23% are cutting out or significantly reducing dairy consumption

Unhealthy and unsustainable

Very healthy and sustainable



# There are many barriers to changing diets

In our research, consumers often quoted reducing meat consumption as an approach to achieving a healthier and sustainable diet.

Although many consumers associate reducing meat consumption with healthy and sustainable diets, the reality is that most people in the UK (91%) eat meat to serve a variety of needs; with roughly 1 in 5 eating it everyday.

There are many reasons people choose to eat meat. Therefore the notion of eating less of it can feel like a significant loss.

## Core element of daily diet

Those who enjoy meat are reluctant to lose it from daily meals. It is seen as part of a balanced diet that includes protein, carbohydrates, and vegetables. They may cut-down on carbs, but not on the meat which is perceived as a high value item.

## Emotional needs

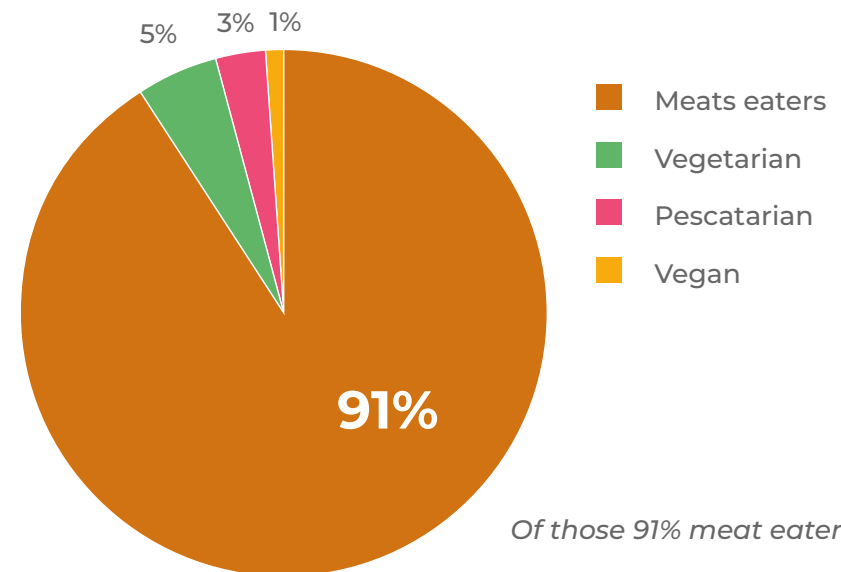
Meat satisfies several emotional needs. Pleasure and enjoyment are important both to the individual and to the family. Meat offers ease and versatility due to the familiarity of traditional meals.

## Physical needs

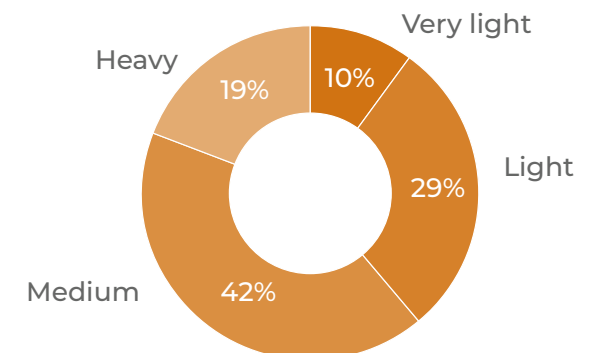
Meat is also felt to satisfy physical needs, providing nutrition and energy. It's seen as a source of essential nutrients that are 'key to a balanced diet'. It's filling and provides a sense of satisfaction and energy.

Which of the following best describes you?

Base: Total sample, n=1,002



Of those 91% meat eaters:



Heavy: Eat meat everyday

Medium: Eat meat every other day or a few times a week

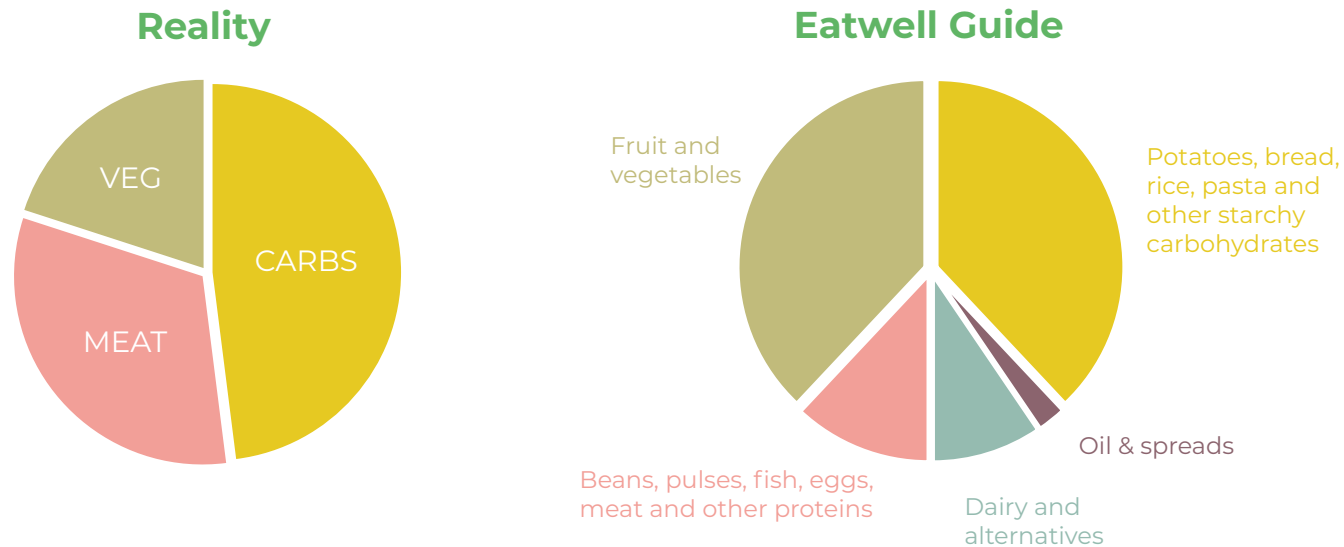
Light: Eat meat once or twice a week at most

Very Light: Eat meat every two weeks or less

# There is a gap between recommendations and reality

Although most people can describe a balanced diet and recall public health recommendations - the Eatwell Guide, it can be hard to translate this knowledge into action.

Consumers who eat meat on a daily basis, feel they are already achieving a 'balanced diet' and often see no need to change. This is reinforced by their food diaries which show that the proportions of food groups people consume is not aligned with public health recommendations (the Eatwell Guide). The food diaries showed plates that contained too much carbohydrate, not enough fruit and vegetables and too much meat as a proportion of each meal. We also noted in our focus groups and food diaries that portion sizes are regularly misjudged.





A top-down view of a white ceramic dish filled with lentil soup. The soup contains green lentils, sliced carrots, mushrooms, and spinach. Two wooden spoons are resting in the dish. In the background, there are pita breads, a whole carrot, and a red tomato. A semi-transparent dark grey box with white text is overlaid on the left side of the dish.

**There is  
significant  
appetite for  
change**



# Introducing the transtheoretical model of behaviour change

The transtheoretical model of behaviour change is a well evidenced model that maps consumer readiness for change as a five-stage journey.<sup>11,12</sup>

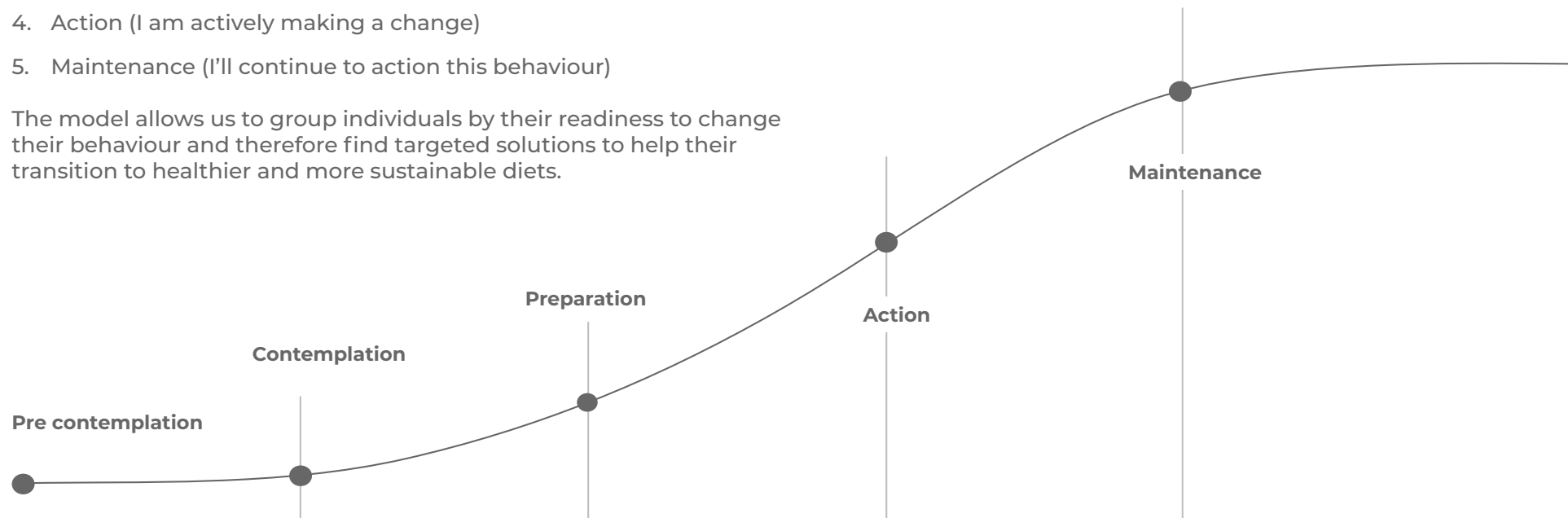
These are:

1. Precontemplation (I haven't considered that, yet)
2. Contemplation (I'm considering that)
3. Preparation (I am getting ready to make a change)
4. Action (I am actively making a change)
5. Maintenance (I'll continue to action this behaviour)

The model allows us to group individuals by their readiness to change their behaviour and therefore find targeted solutions to help their transition to healthier and more sustainable diets.

“Healthy for me would be lentils, a bit of protein, some veg in proportions... rather than a massive steak, lots of potatoes and a little bit of veg. It wouldn't be that anymore.”

*Male, Leeds*



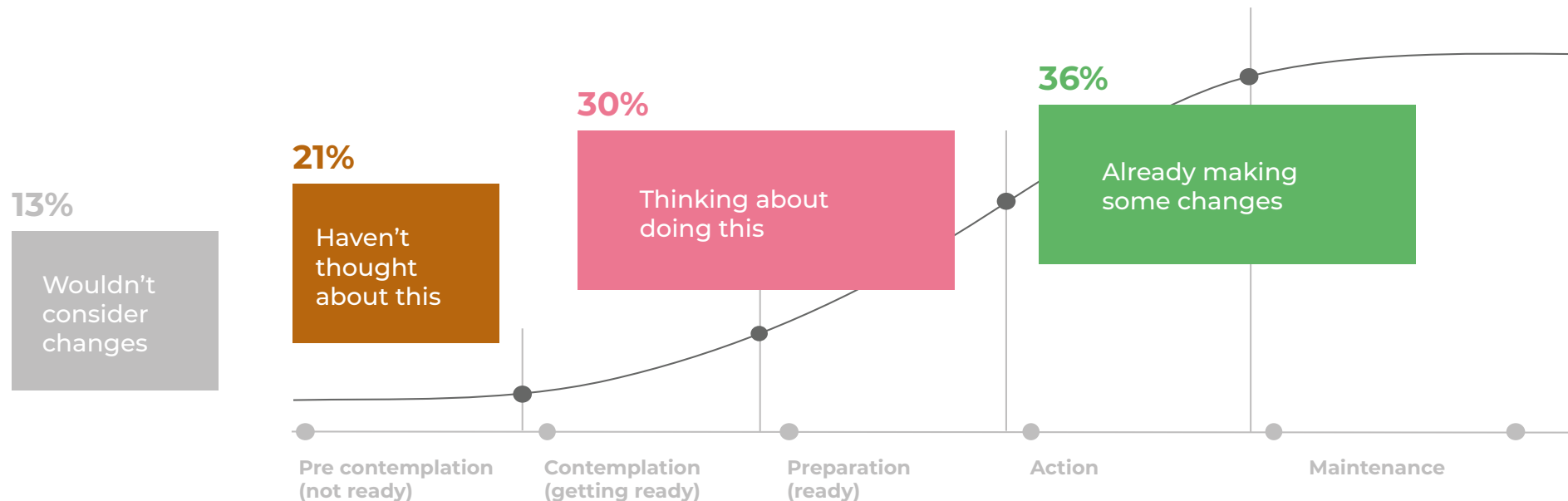
# The appetite for change is significant

Over 66% of consumers are already changing their diets or are thinking about making changes to be healthier and more sustainable.

These two groups present the biggest opportunity: they welcome help from industry and are looking for products and solutions that meet their needs.

There are also people who are resistant to change (13%), and those who haven't thought about it yet (21%). To bring these people on the journey it is critical to help them understand what a balanced diet is and normalise healthier and sustainable choices to avoid a sense of loss.

Nudge tactics, such as adapting store ranging, changing menu layouts and reducing portion size, can help people to make better choices without even noticing.



# A tale of three mindsets

Depending on people's acceptance for change, there are different things that influence their eating habits and food choices. These will determine the way you can inspire change.

## Haven't thought about this

- Fear losing the healthy balance in their diets without daily meat
- Perceived value-for-money of meat is high due to protein content
- Ease of preparation is key
- Vital that the family will love it

## Thinking about doing this

- Fit food around their busy lives
- Meals must be simple and easy to make
- Needs to be easy to access on-the-go
- Keen to reduce feelings of guilt

## Doing this already

- Pleasure comes from the sensorial aspects of food as well as the nutritional value
- Love to experiment with cooking
- Have a broader understanding of sustainability
- Looking for more help with factors beyond their control





# How do people in these mindsets perceive their diets?

Understanding of healthy eating

## I'm doing this already

"I've cut down on my meat because I know it's full of fat, especially red meat is bad for my heart. Instead I'm having more fish, lentils and beans. I'm also trying to avoid processed food with artificial ingredients."

Female, 40s, London

## Thinking about it

"I know I need to be more careful with my portion sizes and having less fatty foods on my plate. I eat lots of vegetables and fruit too. We also always try and cook from scratch."

Male, 60s, Leeds

## Haven't thought about this

"I think I'm healthy, it's all about everything in moderation. Also, make balanced meals with meat, carbs and veg from scratch. It's also about reducing my sugar and salt which I know I have too much of."

Female, 50, Leeds

Behaviour change of eating habits



**Health is  
the primary  
driver**



## Drivers to healthy and sustainable diets...

“

**I try to do something  
more nutritional because  
the children are really  
active**

*Mother, Leeds*

”



# Health is more important than environmental impact when making purchase decisions

Health is the biggest motivator for change.

It's especially important amongst older consumers, aged 45-54, and higher socioeconomic groups (ABC1s).

Personal and family health are significantly more important than environmental impact when making purchase decisions.

The environment can provide a supporting reason to change, especially for younger women. Those aged 18-24 (22%) and those who eat more plant-based diets (28%) are also more motivated by this.



## Behaviour science explains this as present bias.

We give more weight to the here and now and immediate rewards, while placing less value on long-term consequences. Healthy eating may have relatively immediate benefits; whereas sustainability is seen to only have an impact in the distant future.

*We would now like to think about all the different things that may be important to you when deciding what food/drink to buy. Please select the 5 areas that are most important to you.*

*Base: Total sample, n=1,002*

Very important

38% rank  
1st or 2nd

28% rank  
1st or 2nd

Less important

- Price
- Quality
- Ingredients
- How healthy or unhealthy it is**
- Organic
- Special offers
- Supermarket own label
- Brand
- Where the product is from
- Convenience
- Pack size
- Impact on the environment**
- Recyclability/packaging
- Ease of use
- Familiarity with brand/product

# Personal health is the most motivating factor to drive change

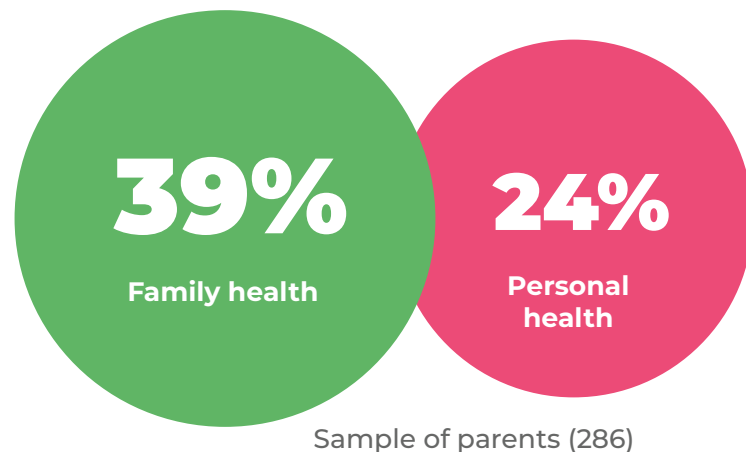
Consumers are particularly motivated by minimising risk of future illness, keeping themselves at a healthy weight and just generally wanting to look after themselves a bit better as they grow older.

Feeling good and having more energy is also motivating.

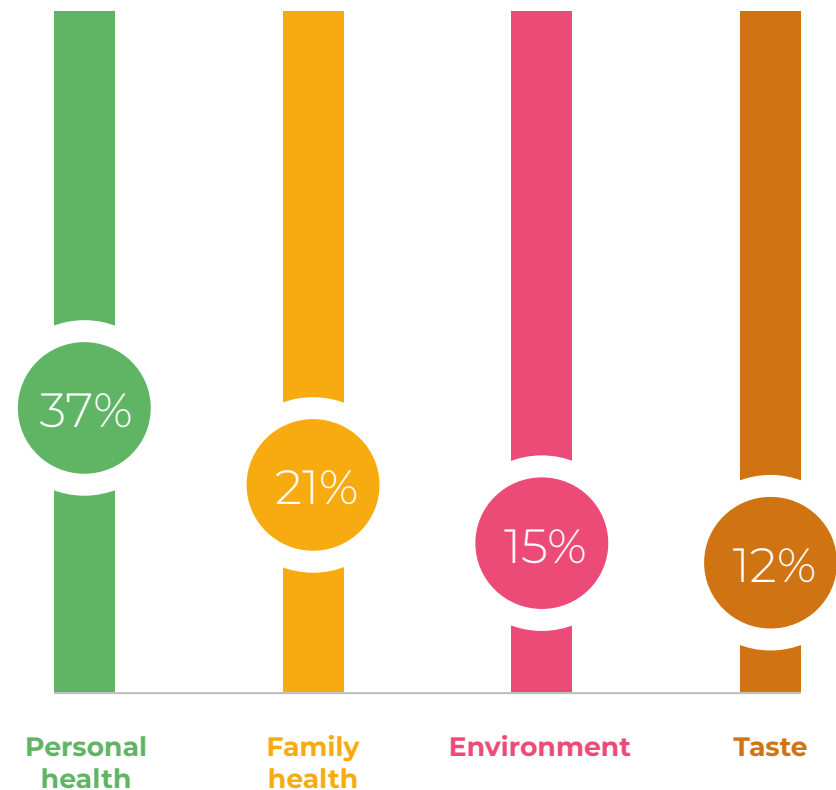
Mental wellbeing is a greater motivator for younger consumers (18-24).

Although family health is rated lower than personal health when looking at a nationally representative sample, family health is actually a bigger driver among parents, particularly early family.

For parents of 0-16 year olds, family health becomes the main driver for dietary change.



## Areas most motivating towards healthy sustainable eating (Total sample)



# When it comes to sustainability shoppers claim packaging recyclability and animal welfare are important

Although it's rarely a primary motivator for change, sustainability and the environment do provide a supporting reason for change.

Animal welfare and recyclability of packaging are most significant to consumers, and this is information they can source on pack or at point of purchase.

These messages also provide motivational feedback loops which is one of the behaviour change shortcuts. For example if your purchase drives better farming practices or reduces waste to landfill, this will motivate you to repeat and potentially maintain this behaviour.

**Those aged 18-24 (22%) and those who eat more plant-based diets (28%) are most motivated by the environment for healthy sustainable eating.**

Animal welfare more important among:

- Females
- 35+ & Late family

Recyclability more important among:

- Females
- 55+ & Empty Nesters

*When choosing food and groceries in a supermarket, how important are each of the following to you?*

*Base: Total sample, n=1,002*

Very important

**Packaging recyclability**

**Animal welfare**

How it has been produced

Impact on the environment

Whether food is produced locally

The distance it has travelled

Whether it's organic or not

Less important

# Why is health more motivating than sustainability, especially when they are linked?

It's human nature to feel a need for control.

Healthy eating generally feels personally relevant. It's within the control of individuals, but sustainability is often seen as beyond our control.

When it comes to protecting the planet, many people believe that they have limited impact and that industry and government need to act instead.

There is also confusion around the environmental impact of the foods we eat, and how we should act.



## Lack of understanding

They say that cows farting are the main reason for climate change, cows have been farting for years so I don't see how that can be the case. I need to know more to be honest.

*Male, 60, London*



## Scepticism

There's a lot of falsehoods, if everyone in the world went vegetarian we wouldn't have enough space to grow all the plants. It's difficult to ascertain the truth from the stretching of the truth.

*Male, 40s, Leeds*



## Lack of trust

This whole big issue with cows is nonsense. There's a tremendous market in vegan and vegetarian products and there's a lot of money to be made. It's all about marketing, advertising and big business.

*Female, 30s, London*



## Barriers to healthy and sustainable diets...

“

**Being healthy is great but  
it never tastes as good as  
unhealthy, does it....?**

*Male, 30, Leeds*

”

# Perceived higher cost is the strongest barrier to healthy and sustainable eating

Families are especially cost sensitive and cost is a significantly stronger barrier for those who perceive themselves to have less healthy diets.

It's less of a concern among AB and 45+ consumers, but still the number one barrier.

It also remains the main barrier among non-meat eaters and those already reducing or considering reducing meat consumption.

*What do you feel is currently preventing you from following more healthy sustainable eating habits, either at all or even more?*

*Base: Total sample, n=1,002*



41%

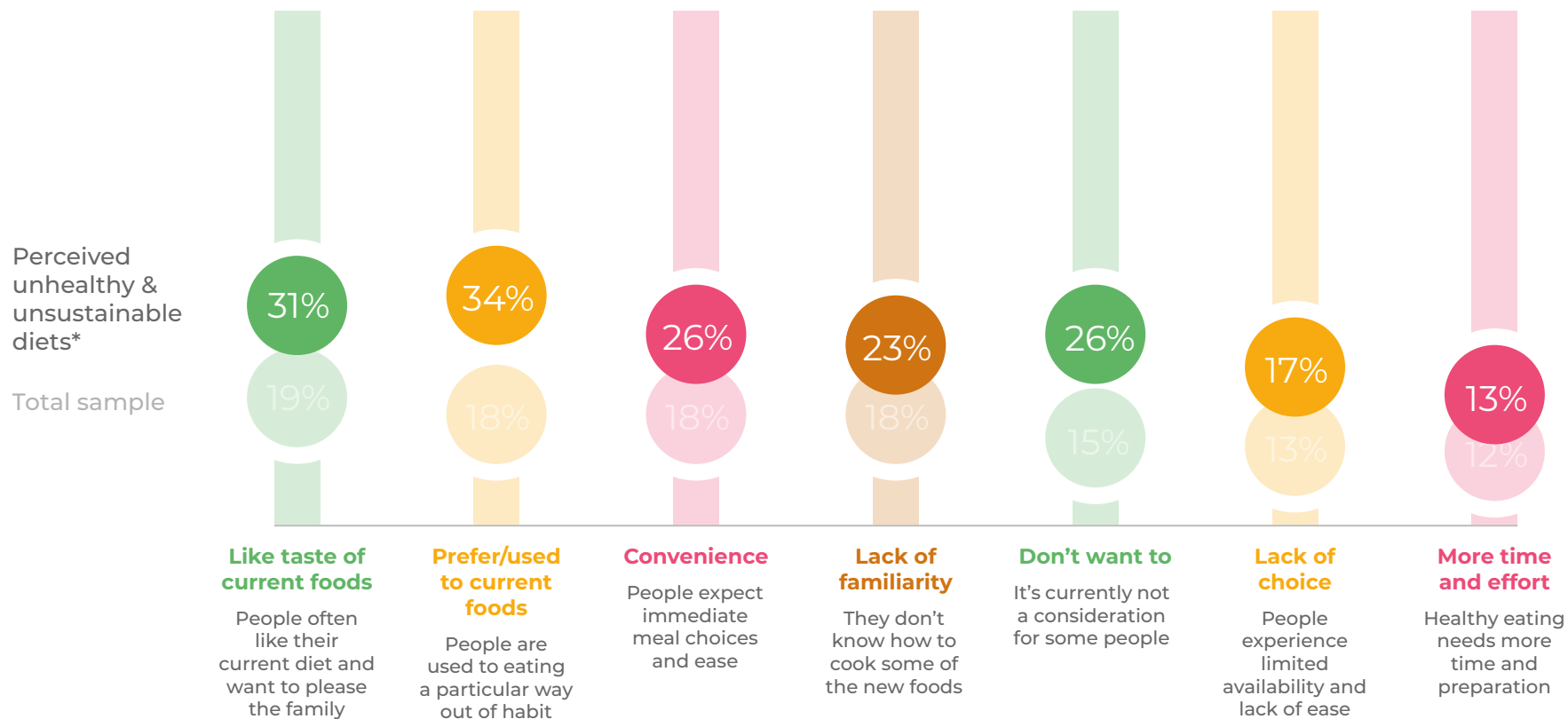
perceive healthy sustainable eating to be more expensive, making it the number one barrier.

# Secondary barriers revolve around a lack of familiarity and perceived higher effort

These barriers also need to be overcome, but apply to a much smaller percentage of consumers than perceived higher cost.



# These barriers are significantly stronger among those who perceive themselves to have less healthy and sustainable diets



\*A low healthy and sustainable diet is defined as a self reported diet score of 1-4. See page 17



“

**It's so much easier to  
buy a ready meal or  
McDonald's when I'm tired  
after a long day, rather  
than thinking about a  
healthy meal that I have  
to cook from scratch.**

*Male, 50s, Leeds*

”



# Testing consumer acceptability of different approaches



# Explaining the research methodology: reaction time testing

Knowing that many consumers are open to change, we used reaction time testing to understand the attractiveness of various solutions that promote healthier and more sustainable eating.

## What is reaction time (RT) testing?

RT testing helps us to understand the strength of association with various solutions. The faster the reaction time the more accessible the attitude from memory, and therefore the stronger the association. It is these strong links that facilitate our unconscious decision-making process.

<b>Says it AND truly believes it (Fast 'Yes')</b>	I agree  Reaction time is <b>FAST</b>
<b>Says it BUT does not truly believe it</b>	I agree  Reaction time is <b>SLOW</b>

## Explaining RT results

1. Consumers are shown a concept or idea
2. They are asked if they would consider trying this
3. We capture both their rational response (% agreement) and their emotional reaction (based on the speed of their response\*)

From this we look at those who would consider trying an intervention, and analyse whether their response was slow, medium or fast. The reaction speed demonstrates the strength of emotional connection with an idea.

The fast answers can be used to identify ideas which consumers are certain they would or would not consider. Their views are strong and considered.

The slower answers can be described as wishful-thinking or uncertain answers. They highlight areas that consumers are not yet sure about. Whilst this highlights some new opportunities and areas where people have not made up their minds, the concepts are less attractive than those receiving a fast yes.

In this testing we measured people's acceptance of concepts both by total responses (explicit) and by only fast answers (implicit).

In short, RT testing shows whether people really believe they would take action.

# We used a variety of stimuli to understand consumers

Having explored numerous ideas to promote healthy and sustainable diets in our focus groups, we identified a selection to evaluate with reaction time testing.

The stimuli tested was intentionally chosen to generate a reaction, allowing us to see what types of interventions can help transition diets. It is neither an exhaustive list nor a recommendation.

However, the way people interact with these concepts has highlighted opportunities and themes to be further researched and those that are likely to be rejected by some consumers.

**Meat Free Monday**



**Veganuary**



**Go Vegan**



**Carbon traffic light labelling**



**Signposting to local vs imported**



**Blended meat products**



**Meat replacements ("plant")**



**Meat replacements (Vegan/Vegetarian)**



**Jamie Oliver**



**Plant-based cookbooks**



**Meat alternatives within meat aisle**



**Eatwell Guide**





# People consider easy solutions the most



## Easy solutions are given most consideration.

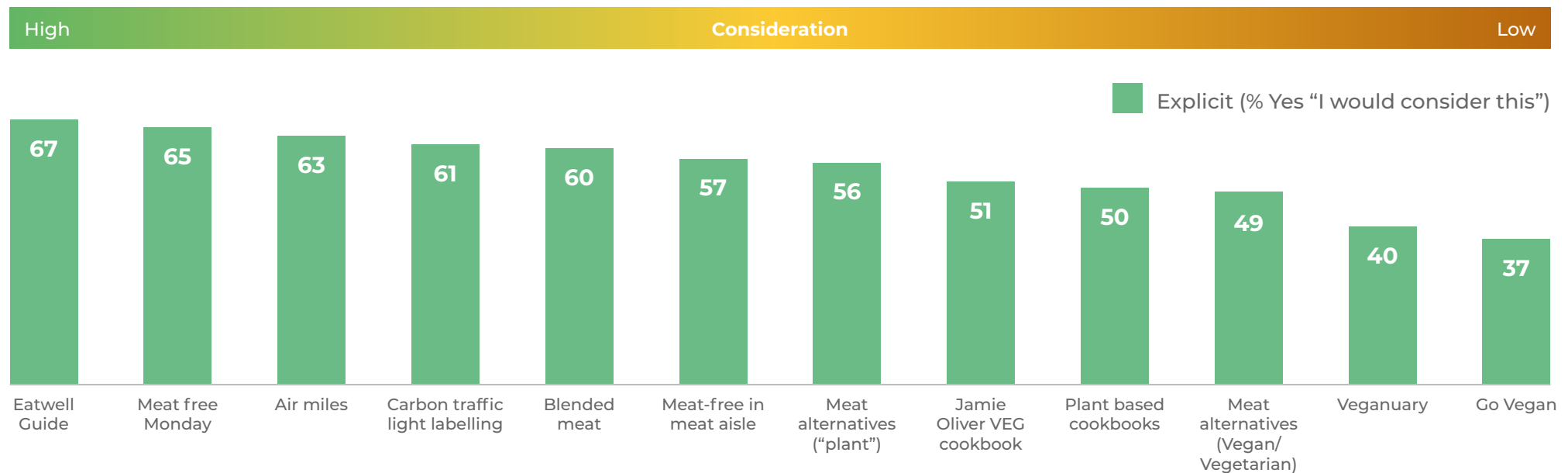
Status quo bias means people are inclined to keep things as they are. We stay with what we know, what we have done before, or what seems like the easiest or default option.

Because of this, it's not surprising that public health recommendation the Eatwell Guide was given most consideration. Sadly we know from our focus groups that people think they are already achieving this.

There are transferable learnings. People can relate to a plate, the concept of balance and to eating most foods (in moderation)

Low perceived effort

High perceived effort



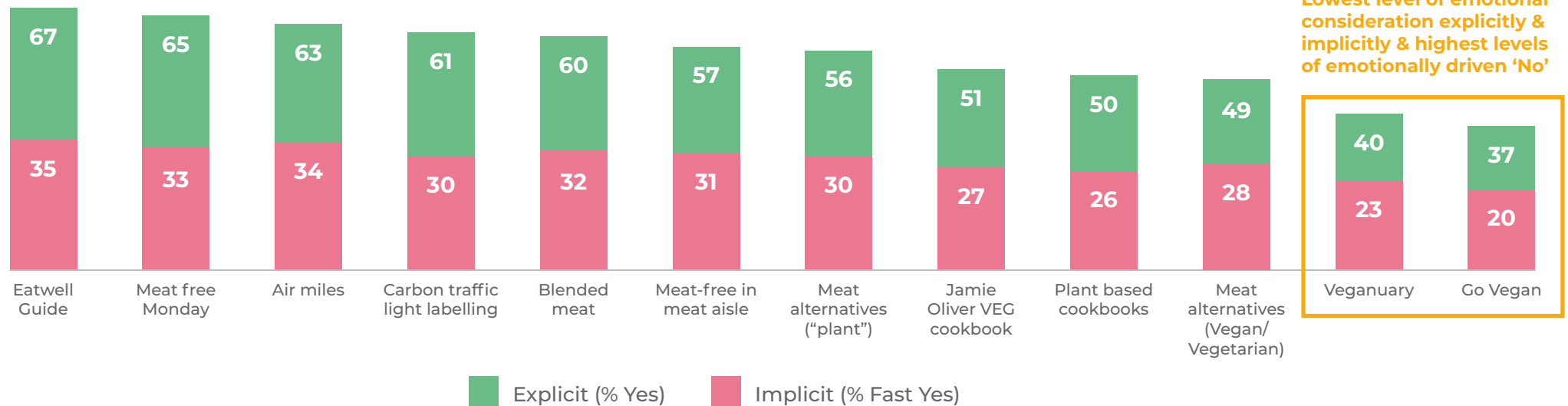
# A rapid response shows people feel strongly

Dramatic lifestyle changes like undertaking Veganuary or going vegan were given the lowest level of consideration.

This was reinforced throughout our research. Despite the UK now being the world leader for vegan food launches, our consumer groups 'considering change' and 'resisting change' are unlikely to try a product labelled vegan

because they don't find it personally relevant and assume it will have poor taste. Brand owners should therefore carefully consider their target audience before using a strong vegan positioning for their products.

Conversely Meat free Monday was given high levels of consideration as this is seen as an easy, manageable step.



# Easy solutions are critical

We learnt that consumers are open to a range of initiatives that make it easier to change eating behaviours, but there are significant demographic differences when testing interventions.

- Younger consumers (18-24) are far more open to considering interventions than older consumers
- Women are more open to considering interventions than men
- Lower socioeconomic groups (DE vs AB) are less open to considering interventions reinforcing cost perception as a barrier
- Those who don't eat meat every day are more open to considering interventions than those who do, and found them personally relevant
- As you would expect, those who are already making changes are much more receptive to all the ideas
- Those who haven't thought about making changes show the highest consideration for the small steps, e.g. blended meat products, demonstrating there is room to nudge this audience to evolve their diets







# Translating the research findings into action



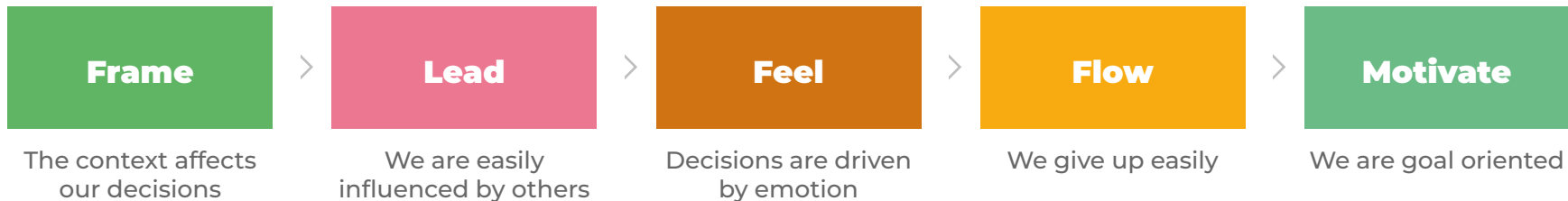


# Applying the behavioural lens to drive change

We have applied behaviour science throughout our entire research process to identify effective approaches that food retailers, manufacturers and foodservice providers can take to influence change.

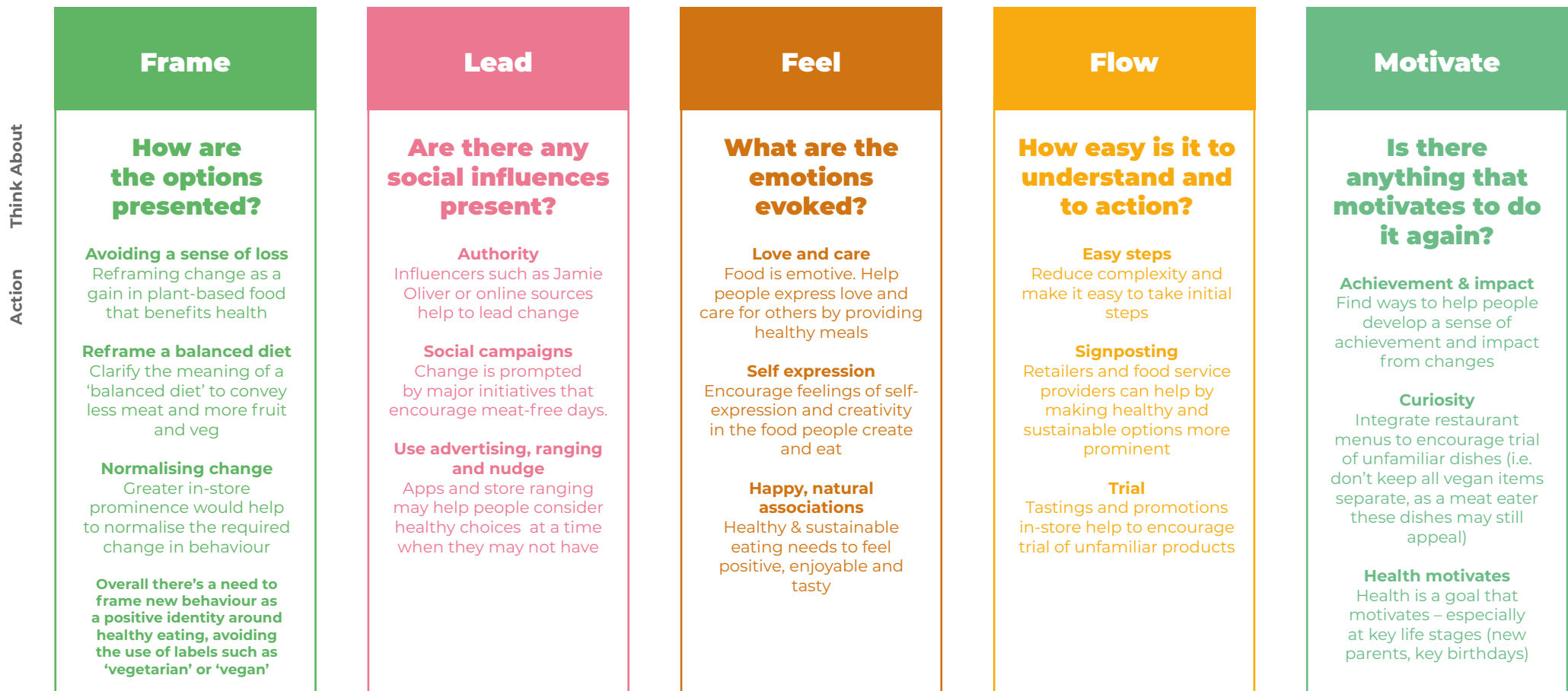


This can be simplified into 5 key shortcuts. The shortcuts are based on principles from behavioural economics, psychology and the social sciences. (See slide 12 for more detail)



# The framework in practice

This chart shows there are many actions that we can take to encourage positive behaviour change towards healthy and sustainable diets. The impact of solutions will vary depending on the mindset of consumers, so targeted and personalised interventions are likely to be more effective.



# Translating behaviour change theory into practical solutions

Looking at the results from both the qualitative and the quantitative stages, we've identified five key approaches to encouraging change.

These approaches can be implemented to target the three mindsets on our change curve.

**Ease:** Make the first steps easy. We are more likely to act when complex activities are broken down into easy tasks *E.g. Meat free Mondays are seen as an attainable way to take a simple step.*

**Signposting:** Use signage to make the right choice easy and highlight the potential gains over perceived loss. *E.g. Labels to highlight healthy and sustainable options.*

**Placement:** Prime positioning would encourage more browsing for those who do not typically eat this type of food and allow for comparison. *E.g. Placing plant-based options side-by-side with meat products provides proximity and ease. Online suggestions can also play a key role for many who are looking to make changes to their diet.*

**Product:** Ensure healthy and sustainable options are appealing and inspiring *E.g. Plant-based meat alternatives would be an easy switch for those who eat little meat offering convenient meals that they know.*

**Influence:** Inspiring ideas and influencers can play a key role. *E.g. Recipe cards and online influencers can motivate and inspire change.*



# The balance of foods and our portion sizes have a role to play

## The Eatwell Guide

The guide feels familiar to many and fits with their self-perceptions of eating a balanced diet of carbs, protein, fruit and vegetables.

As a result of its familiarity it may not establish a strong motivation to change behaviour, especially as our focus groups showed people think their diets already reflect this guidance.

## The Portion Control Chart

Many people would welcome information on portion sizes, as this is not currently an area that they spend much time considering.

People find recommended portions surprisingly small by comparison to what they are eating.

People describe the ways that supermarkets and restaurants package and serve portions, as well as the size of plates and bowls as ways that they judge portions. E.g. one chicken breast = one portion.

For further insight and best practice on setting portion sizes please view [our industry guidance](#).



“

**When I found out the portion control recommendation was the size of the palm of the hand, my wife and I looked at each other; the steak we had the night before was twice that.**

*Male, Leeds*

”



# Meat-free campaigns can work, if they seem easy

## Meat free Monday

Giving up meat one day a week can be a good starting point for those thinking of reducing meat. In RT testing this had the highest level of emotional reactance.

Sometimes small first steps can lead to bigger changes, and small changes are often easier to maintain.

*"It's only one day a week, I pretty much do that anyway so is completely fine." Female, 30s, Leeds*

## Veganuary/Go Vegan

Veganuary seems hard to achieve and is very emotive. For many meat eaters, this big change taps into all the aspects of loss that people fear, including loss of identity.

People who eat meat do not aspire to become vegans.

*"I don't like this, why should I give up meat and cheese for a month, they should tell me why and what the benefits are." Male, 50s, Leeds*



Ease

“

**Each to their own. Don't direct our diets! The information on the leaflets is good, but I don't like the tone. If you went vegan for one day you could save x amount rather than an all or nothing approach. I want the choice. It's too authoritative.**

*Male, London*

”

# Environmental impact signposting has potential to educate

## Air miles and carbon footprints

Bearing in mind environment is a secondary driver to adopting healthy and sustainable diets, indicating air miles and carbon footprints may help to reinforce positive change for those looking for more information.

This is currently an area over-looked by most consumers, who have little idea how far their food products have travelled and how much impact this has on the environment.

## Rearing and origin

Labelling the origin and production methods of meat (e.g British, Free range) motivates some, but many people distance themselves from the production of meat and animal products, mentioning that supermarkets have 'sanitised' it for them.

Cost is a major consideration for shoppers, they will only be willing to pay a small premium for different types of meat.

Those who cannot afford organic or free-range experience guilt.



“

**I'm buying for a family and  
it's a big consideration  
trying to get them to eat  
different foods.**

*Female, 30, Leeds*

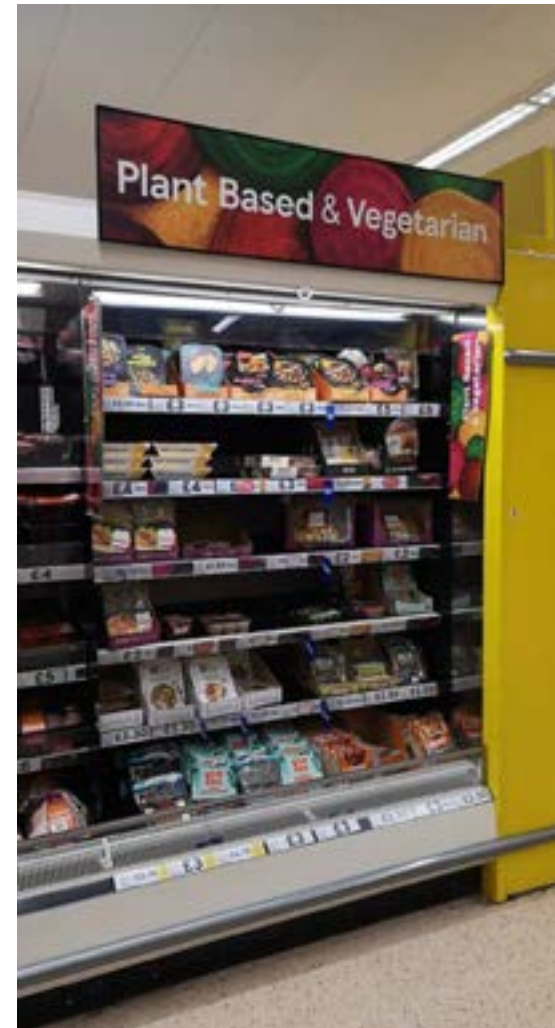
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# The right placement can nudge meat-eaters to try plant-based products

Placing plant-based products with their animal-based equivalents, would normalise their place in the diet. This increases accessibility and avoids a sense of 'it's not for me'.

Prime positioning would encourage more browsing for those who do not typically eat this type of food and allow for comparison.

*N.B. Further in-store placement alongside meat produce needs to be tested with vegan and vegetarian audiences.*



Placement



“

**I think location would have an impact and make me more inclined to pick it up. It would be useful to have it together. The milk aisle is now mixed with cow's milk and alternatives.**

*Female, Leeds*

”

# Meat alternatives resonate with those already reducing or thinking about reducing meat



Product

## Blended meat products

Blended meat products, which are part meat, part plant-based are more appealing to those who don't eat meat every day. They reduce the sense of loss to those making changes as they are still getting the goodness and taste of meat, but with some additional benefits.

These products provide familiarity and are viewed as a low-risk option for families. However parents comment that they would need to be at a reasonable price.



## Plant-based alternatives

Plant-based alternatives would be an easy switch for those who eat little meat offering convenient meals that they know.

Some have a real dislike for these types of products, with many heavy meat eaters claiming that they would rather just eat more vegetables instead of swap meat to a plant-based alternative. Reluctance often stems from the unfamiliarity of the ingredients.



“

**These actually sound good, that way I'm going to get the taste of meat but some of the goodness of the peas and other vegetable protein.**

*Female, Leeds*

”

# Among those thinking of, or already making changes, recipe books offer some inspiration and new ideas

Recipes can help to make the first use of unfamiliar ingredients feel easier.

Some people use recipe books and watch cookery programmes for inspiration. Online inspiration also plays a key role for many who are already making changes to their diet.

There is low emotional resonance towards the plant-based cookbooks we tested. Celebrities like Jamie Oliver bring an element of familiarity and sense of trust, which seems to help, especially among those who are 'thinking about changing their diet'.



Influence



“

**I'm on Facebook on Pinch of Nom, which is like Slimming World recipes. I've got the book as well, but people vary it online. I think Instagram is very false.**

*Female, Leeds*

”





**Change is  
possible,  
but it needs  
to be easy  
and targeted**

# Activities to engage those not considering change

Whilst not a key audience just yet, those not considering change or resisting change can be persuaded to start their journey if there is a change in their circumstances. It is important not to exclude them and continue to build familiarity through positive and inclusive communication.

As healthy and sustainable diets become the norm, these late adopters will join in. Normalise these eating habits by framing them as a wider cultural change, with evidence that more and more people are adopting healthy and sustainable diets.

## Top tips

- These consumers are turned off by vegan and vegetarian labels, associating them with poor taste and lack of personal relevance
- Raise their curiosity through new products, trials and placement in store, as well as on restaurant menus
- The biggest barrier is cost perception; try not to price these products out of reach
- Focus on gains not losses. Instead of highlighting the loss of meat, focus on the gains of eating more vegetables and what this means for personal health



**Influence** this group by using inclusive communication to normalise change. *For example, demonstrate that more and more people are adopting healthy and sustainable diets.*



Make it **easy** to understand that their current food choices and portion sizes may not be as healthy and sustainable as they think. *For example, re-balance the components of supermarket products and restaurant meals to reflect healthy and sustainable principles.*



Creating new **products** that are healthy and sustainable will help to motivate and intrigue this group, reinforcing a feeling of 'I'm trying something new, not losing something I love'. *For example, blended meat products provide familiarity and reduce the sense of loss.*



As a starting point, use nudge tactics to prompt easy first steps. Making the switch seem easy, affordable and low effort is critical. This can be done by reflecting on **product, placement** and price. *For example, placing plant-based options side-by-side with meat products provides proximity and ease.*

# Activities to tip those considering change into action

These consumers are on the cusp of taking action and represent the biggest opportunity. Encourage them to make change by interrupting them, for example placing plant-based milk next to dairy in store.

Positive reinforcement is key; allowing these consumers to feel good about the changes they make provides a sense of achievement. To start, communicate the health benefits of the changes they are making (e.g. less saturated fat). For long term impact, it's important to normalise new behaviours by showing that more and more people are adopting healthy and sustainable diets. This will motivate this group to keep up new habits.

## Top tips

- Product placement is very important. Consider ranging plant-based products with their meat alternatives. Give clear signposting that can be recognised and followed
- Don't label products as vegan. These labels suggest the product is 'not for me' and may be perceived as having a poor taste
- Focus on the gains of eating more vegetables and what this means for personal health
- Chunk the challenges into easy and manageable steps, e.g. Meat free Mondays



Inspire and engage this group by making it **easier** to eat more healthy meals both in and out of home. *For example, recipe cards can help to make initial use of unfamiliar ingredients easier, and some people also use recipe books and watch cookery programmes for inspiration.*



Make changes easy by **placing** plant-based substitutes in the meat/ dairy aisles in store. This prime positioning encourages browsing and comparison for those who do not typically eat this type of food.



**Signposting** healthy and sustainable options can encourage people to try something for the first time.



Ensure any change feels **easy** and manageable. *For example, Meat free Mondays appeal much more to this group than Veganuary: whilst it represents more meat free days each year, it's perceived as more attainable.*

# Activities to support and maintain the behaviour of those already making changes

For those who are actively making changes, it's about maintaining excitement and increasing ease. It's important to reinforce the change by making people feel good, providing a sense of achievement and showing the impact that their actions have made.

Providing ways to create healthy meals for the family that will ensure positive feedback. These are often people who enjoy self-expression through food and love to discover and experiment.

## Top tips

- Make it easier by providing more healthy and sustainable choices, especially out of home
- Environment is important. Consider your offering holistically from production to packaging
- Use celebrities and inspiring recipes to influence and reinforce change, in and out of home
- There is an expectation for industry to drive positive change. Schemes that promote welfare, sustainability or better business e.g B-corps can be appealing

## Watch out

- For those actively reducing meat, further in-store placement of plant-based items alongside meat produce needs to be tested



Make it **easy** by finding solutions that fit with a busy lifestyle, especially when eating out. This will help sustain change. Our shopper research suggests that 31% of people would eat out more regularly if more healthy options were available.<sup>13</sup>



There are opportunities for **product** and **placement** here to reduce the effort of maintaining changes. For example, make it easier to eat more healthily by providing easy plant-rich meals or recipe bundles.



Inspiration is required in home too as consumers look to be motivated to try new recipes to cook quick, **easy** and healthy, plant-rich meals.



Unlike other groups, these consumers are motivated by 'doing good for the planet'. Reinforce their actions by **signposting** additional information on how to consume a healthy and sustainable diet, including messaging on pack. Higher expectations from industry mean ethical accreditations can be appealing.



# Next steps

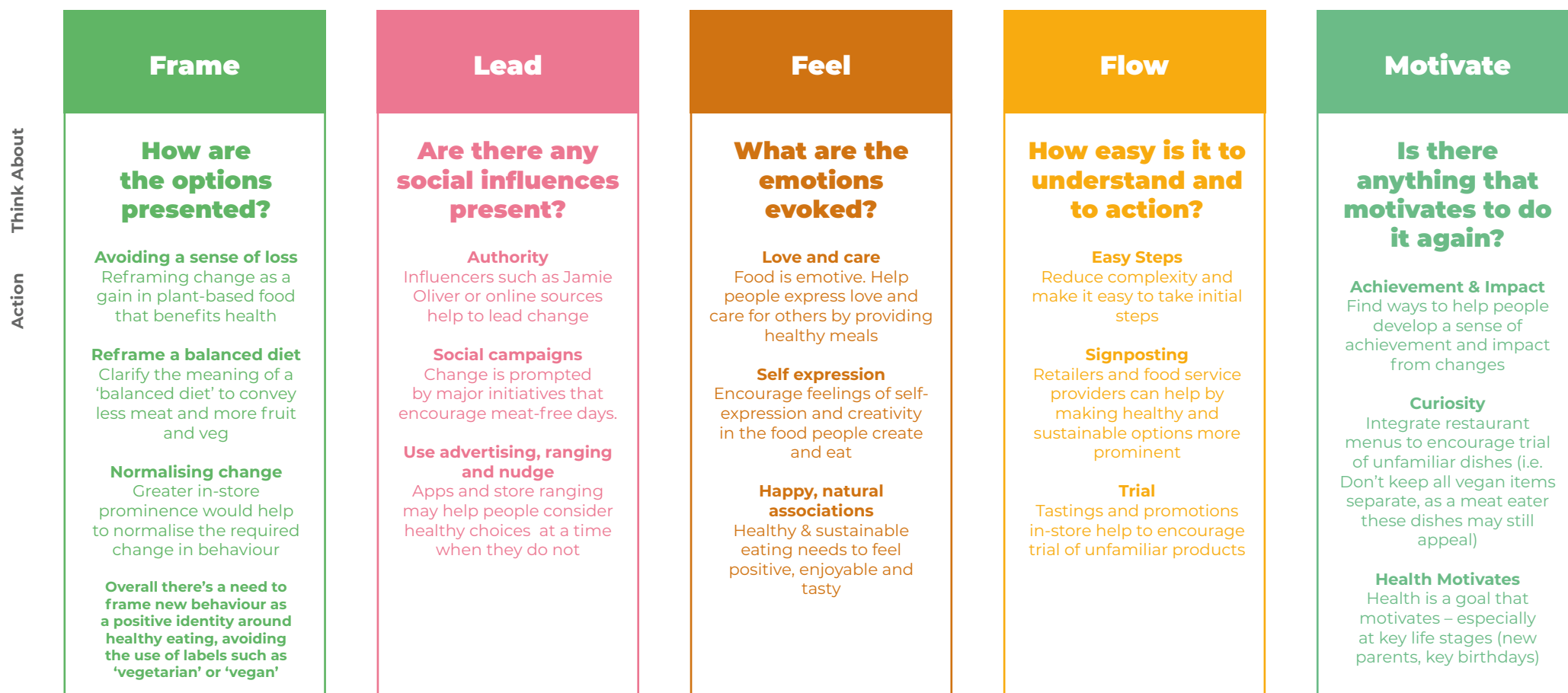




In conclusion, there are many actions that we can take to encourage positive behaviour change towards healthy and sustainable diets. The impact of solutions will vary depending on the mindset of consumers, so targeted and personalised interventions are likely to be more effective.

We all have a role to play, but our impact will be much greater if we come together to drive the change required.

Our 5 behaviour change shortcuts can help you to drive positive change.



# An opportunity for real-life testing

We brought together a range of industry and non-industry stakeholders from across retail, manufacture, foodservice providers, government and academia to explore what interventions we could put in place to drive behaviour change following this research.

We found many organisations are already taking steps to promote better choices, but that there is a need for further evidence. We are therefore keen to bring industry and academia together to test behaviour change interventions in real-life settings and identify the most effective initiatives to drive positive change.

The stakeholder group suggested the following ideas should be tested further. This is not an exhaustive list.

- Meal deals that promote vegetable or salad-based sides (increasing fruit and vegetable consumption)
- Innovative placement both in store and online to 'nudge' purchasing
- Consumer sampling at point of purchase to challenge 'poor taste' stereotype
- More choices for healthier and sustainable food options to eat on the go
- Cost incentivisation of healthier and more sustainable options
- Normalising 'plant-based' to make it accessible for all demographics
- Labelling foods healthy and sustainable

These ideas are echoed in other recent reports including 'A Menu for Change'<sup>14</sup> and a 'Playbook for Guiding Diners Toward Plant-Rich Dishes in Food Service'<sup>15</sup> demonstrating a real opportunity to advance this agenda.

## Get involved

If you would like to get involved with future research please register your interest at

**[IGD.com/healthysustainablediets](https://igd.com/healthysustainablediets)**

or by emailing

**[healthyeating@igd.com](mailto:healthyeating@igd.com)**



# References and acknowledgements



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## Further reading

IGD, 2017. Eating Well Eating Out? Available: <https://www.igd.com/articles/article-viewer/t/eating-well-and-eating-out/i/18186>

IGD, 2019. Can one size fit all? Portion size consumer research. Available: [IGD.com/portionsize](https://www.igd.com/portionsize)

## Definitions

**Plant-based food:** Foods derived from plants and fungi rather than animal sources. This includes fruit and vegetables, beans, grains, legumes, mushrooms, nuts and seeds, plant oils, herbs, and spices.

**Plant-rich:** A diet in which plant-based produce makes up the majority of all foods consumed but that permits small amounts of animal products, including ruminant meat, to be eaten. The terms plant forward diet and sustainable diet are also commonly used to refer to the same pattern of eating.

\*World Resources Institute Playbook for Guiding Diners toward Plant-Rich Dishes in Food Service

# Acknowledgements

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Thank you all for your time and expertise.