Savanta:

Q1 | 2023 REPORT

Grocery Eye

Supporting healthy eating

SAVANTA.COM

make better decisions

Background

The Grocery Eye has been running **since 2014**, surveying around **2,000 people UK Nat Rep Shoppers** each quarter, and covering grocery shopping behaviour with a focus on 4 key topics: **healthy eating(Q1)**, plant based/meat reduction (Q2), sustainability (Q3), shopping missions and occasions (Q4).

Socio-economic attitudes

As with our Consumer Compass, we track four groups – defined by socio-economic attitudes –to understand consumer resilience to economic downturns

14%

Insulated

I'm aware of the problems in the wider economy but it has not really affected me much personally

36%

Cautious

I'm just a bit more cautious about how much I spend and saving a bit more

33%

Squeezed

I'm taking action to buy cheaper brands and/or going to less expensive shops

17%

Sufferers

I've cut all of the expenditure that I can because I'm really worried about the future

Key findings

- The impact of the cost-of-living crisis has revealed a clear link between financial resilience and the ability to maintain a healthy and nutritious lifestyle
- With financial and stress pressures having increased drastically over the last 12 months, the number of consumers who claim to be healthier has significantly declined
- But the aspiration to live a healthier lifestyle remains across all demographics and resilience groups – albeit with slightly different goals and strategies

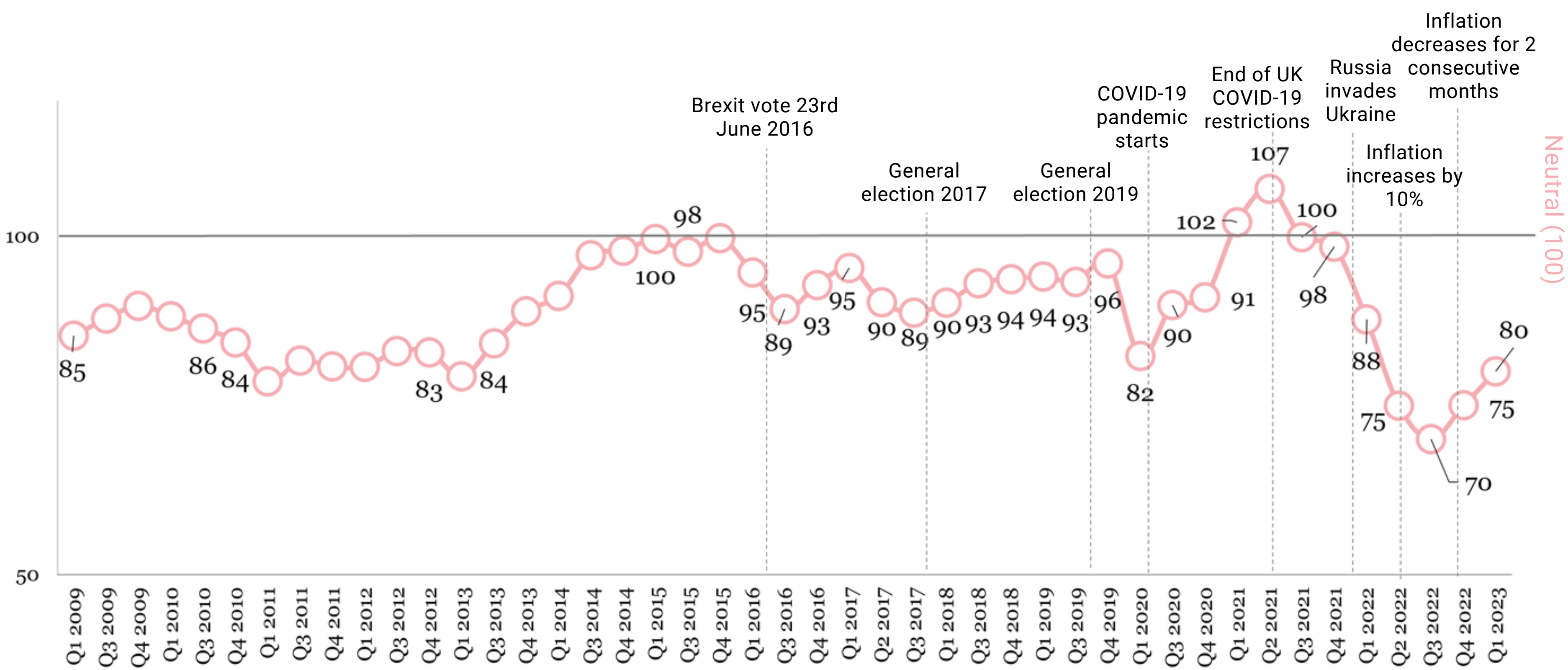
Key findings

- In response to the cost-of-living crisis, we see consumers finding ways to make their money go further by reducing waste, buying lower quantities and changing the way they prepare meals
- Priority decision drivers are starting to shift with taste and quality still being top of the list but not as much as they used to, and other criteria such as health being deprioritised in a cost trade-off
- What is seen as healthy remains similar to past waves, although there are indications of the younger generation approaching healthiness differently, both in terms of what they are looking for and how they are looking for it

Consumer health & the cost-of-living crisis

Whilst we have seen some uplift in overall confidence this quarter, scores remain in negative territory as consumers continue to cut back.

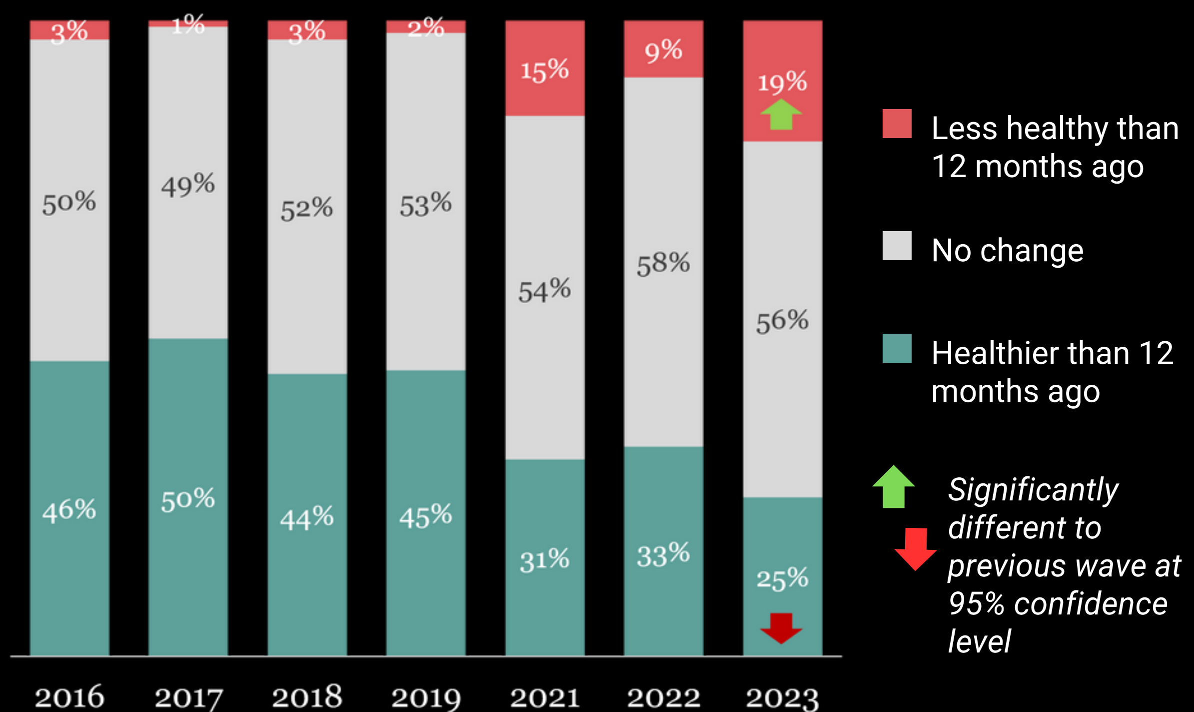
Consumer confidence Index (CCI)



Base: Total sample: Pre Feb/spring '19 (circa 1000 per wave). Feb/Spring '19 onwards (2000)

Probably one of the factors driving a an significant decrease in claimed healthiness – both physical and mental - in the last 12 months

% change in healthiness in the last 12 months



Savanta:

QGEV9. In the last 12 months, would you say you have become more, or less, healthy than you used to be? Base: Total (c. 2000 per wave)

Stress and anxiety remain the key barriers to healthy living, with associated cost not far behind

Top drivers of decrease in healthiness

			Comparison to 2022
1	Stress & anxiety	50%	=
2	Cost of healthy foods	38%	+2
3	Lack of willpower	34%	-14

Significantly different to previous wave at 95% confidence level

QGEV9_2. What has led you to be less healthy? Base: Those who say they have become less healthy. Q1 2022 (191), Q1 2023 (376)

And although the majority would like to do more about their health, there are clear disparities between resilience groups

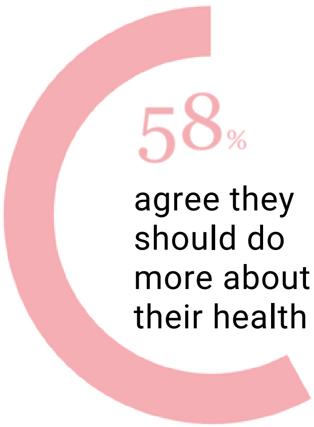
Attitudes/perceptions to current health

Insulated

‘I always make sure I eat 5 a day’	52% ↑
‘I consider my diet to be very healthy’	51% ↑
‘I should do more about my health’	46% ↓
‘I often buy pre-prepared food'	40% ↑

Sufferers

‘I always make sure I eat 5 a day’	32% ↑
‘I consider my diet to be very healthy’	31% ↑
‘I should do more about my health’	64% ↓
‘I often buy pre-prepared food'	70% ↓



↑ ↓ *Significantly different to previous wave at 95% confidence level*

QGEV10. Thinking about your eating habits, attitudes, and behaviour nowadays, how much do you agree or disagree with the following statements? Base: Total (2000), Insulated (284), Sufferers (339)

Consumers are trying to make their money go further by reducing waste, buying lower quantities and changing the way they prepare meals

Agreement with statements (NET Agree %)

73%

Are reducing the amount of food they waste

59%

Are preparing their meals differently to save energy costs

56%

Have cut back on the quantity of their food purchases

QGEV31_1. I am planning all meals for the week in advance: Thinking about your approach to mealtimes overall, to what extent do you agree or disagree with the following statements? Base (n=2000)

However, many are taking even more drastic measures such as cutting out meals

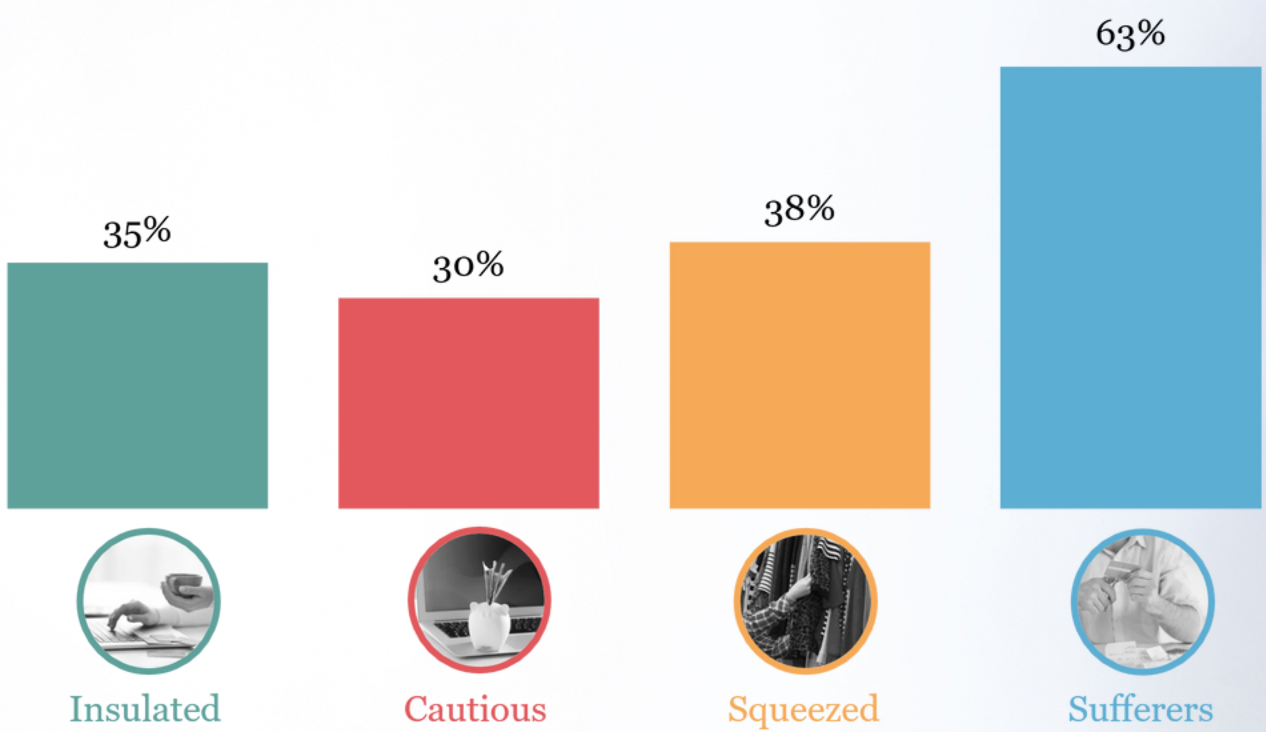
26% Cut-out or sometimes skip breakfast, lunch, or dinner

34% Limit or cut-out snacks (e.g. crisps, sweets)

QGEV11. Which of the following do you currently do? Base (n=2000)

In this context, eating healthily is likely to be scarified in order to prioritise other essential expenses

Agreement with statements (NET Agree %)



Savanta: *QGEV31_1. I am planning all meals for the week in advance: Thinking about your approach to mealtimes overall, to what extent do you agree or disagree with the following statements? Base (n=2000), Insulated (284), Cautious (722), Squeezed (655), Sufferers (339)*

Supporting healthier choices

Although taste remains key to food and drink purchase, criteria around health and quality are losing traction

Considerations when grocery shopping

#	Consideration	%	*Comparison to 2022*
1	Taste	65%	↓ -5pp
2	Highest quality ingredients	41%	↓ -4pp
3	Minimally/ least processed	38%	-4pp
4	Contains only natural ingredients	33%	-2pp
5	Uses only British ingredients	28%	↓ -3pp

↑↓ *Significantly different to previous wave at 95% confidence level*

Savanta:

QGEV24. How important are each of the following considerations for you when buying food and drink? Base: Total (n=2000)

Heroes and villains remain stable year on year, although language is starting to change

Trying to do	
Cook from scratch	**51%**
Eat plenty of fruit and veg	40%
Eat more white meat	33%
Eat plenty of fibres	29%
Eat plenty of protein	10%

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QGEV11(_1). Which of the following do you currently do?
Base: Total (n=2000 per wave)

Significantly different to previous wave at 95% confidence level

And priorities are different between generations and resilience groups

- Gen Z: stronger focus on nutritional content and free-from diet delivered to them in an authentic and easy to prepare format

- Baby Boomers: More wholesome natural, local ingredients that they can cook from scratch and allow them to manage their sugar and salt content

- Squeezed / Sufferers: stronger focus on the basics, cutting down on 'treat' categories and favouring cooking from scratch with lots of lean ingredients

- Insulated: more open to products that help them being healthy from vegan / vegetarian options to quick & easy prepared food

QGEV11(_1). Which of the following do you currently do? QGEV24. How important are each of the following considerations for you when buying food and drink? Base: Total (n=2000 per wave)

One thing everybody agrees on is the need for more deals and offers, especially on basic food items

Categories where offers/deals are most desired

Fresh fruit & veg	Fresh meat & fish	Dairy	Frozen food	Dry Food (Pasta, rice etc.)
61%	54%	43%	41%	37%

… but also on treats which they might otherwise have to cut off completely

Savanta: *QGEV34. When grocery shopping, in which food categories would you benefit from offers/deals the most? Base: Total (n=2000)*

Notes from the editor: Julie Vigne

Julie Vigne,
Senior Research Director

This wave's results really bring home the reality of the cost of living crisis for many shoppers and the difficult choices that need to be made both in the kitchen and at the supermarket.

The desire to eat more healthily remains strong and almost universal, but how you get there will vary greatly depending on your disposable income and your age.

We are starting to see that Gen Z are redefining what healthy means, going beyond their grand-parents' view of meat-and-2-veg meals cooked from scratch and looking more at how to get their nutrients in a quick and easy way that also feel authentic.

Not all categories are impacted in the same way, but our insights clearly show that understanding who your current and target audiences are remains key to category management and shopper marketing as needs and preferences are strongly differentiated when it comes to healthy eating.

We are working with our clients to help them grow their categories by navigating food & drink trends and identifying and leveraging key needs, decision drivers and influences at point of sale.

Want to learn more?

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Savanta is a full-service global market research and data insight company that helps busisnesses make better decisions.

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