Savanta:

Q2 | 2023 REPORT

Grocery Eye

Focus on heathy eating and plant-based diets

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make better decisions

Background

Savanta 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).

Key trends

Only **22%**

of consumers worry food inflation will have a negative impact on their diet (vs 27% last year)

Boomers quite suspicious of free-from products with very strong attitudinal barriers to plant-based products

37%

Cooking from scratch to save money

While GenZ's love story with high protein products, and to a lesser extend free from continues

Key takeouts

Segment & target

NPD and messaging need to account for strong differences in healthy cues

Enable easy navigation

Younger generations would prefer to see plant-based options with their relevant category, not separate

Segment & target

NPD and messaging need to account for strong differences in healthy cues

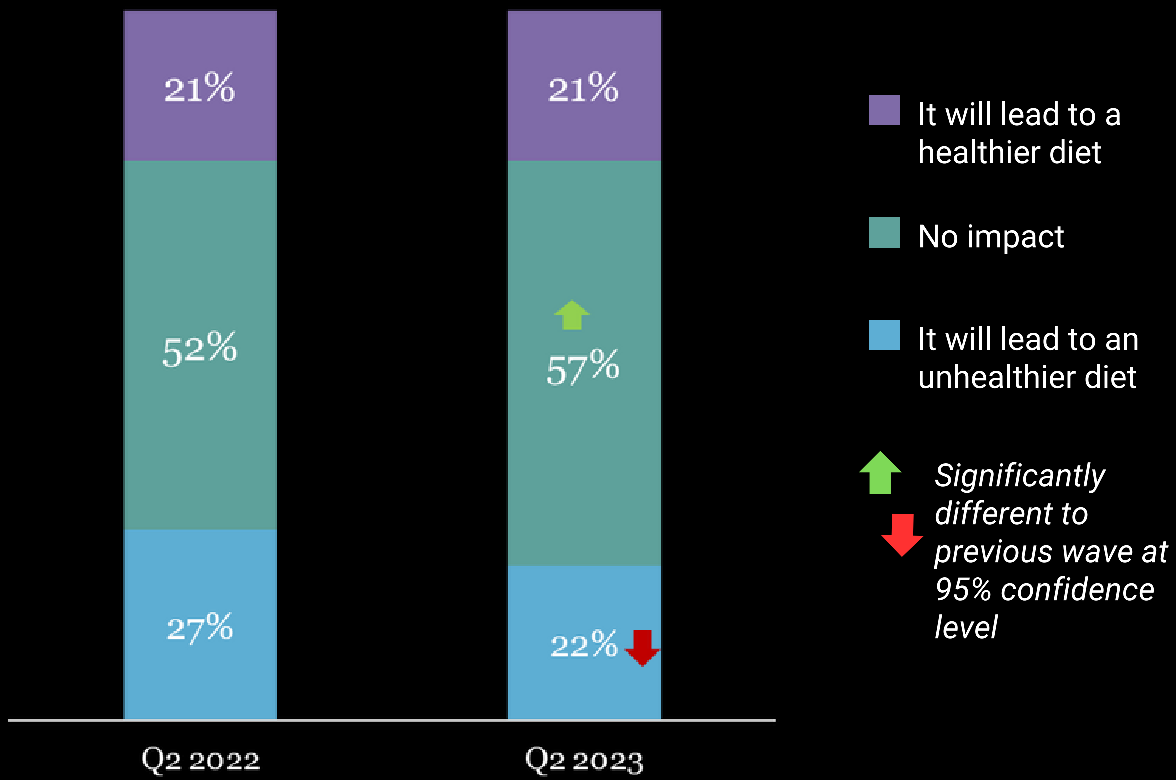
Surf the protein wave

As it provides the biggest opportunity for health conscious GenZs and Millennials

Challenges of maintaining a healthy diet despite food inflation

As they come to grips with food inflation, consumers are increasingly confident it doesn't have to impact their diet negatively

Expect impact of food inflation on diet



This change is being driven by **millennials** this wave, with a 12%-point decline in those stating it will lead to an unhealthier diet

23% (-12%)

As they become more confident

QGEV30a. With inflation rising, what impact, if any, do you think that price increases will have on your diet in the next few months? Base: All respondents (n=c.2000 per wave); Millennials (n=c.515 per wave)

As they have learnt in the past year how to adapt their dietary behaviours by…

43%

1 …Shopping around to find the cheapest prices

37%

2 …Cooking from scratch to save more money

35%

3 …Cutting down on unhealthy treats

QGEV30b. Which, if any, of the following do you agree with when thinking about healthy diet and inflation? Inflation means... Base: All respondents (n=2000)

Significantly different to previous wave at 95% confidence level

However, Gen X and Boomers appear to be better able to manage this change than younger generations

Gen Z

Solution: eating less

Most likely compared to other groups…

…buying cheaper but poorer quality food (29%)

…are not eating enough (23%)

Least likely compared to other groups…

… cutting down on unhealthy treats (29%)

Millennials

Solution: mitigating impact of costs

More likely compared to other groups…

… buying cheaper but poorer quality food (30%)

… Agree it is making healthy food out of reach as too expensive (26%)

… are rethinking recipes to make healthy food stretch further (20%)

Gen X

Solution: mitigating impact of costs

Most likely compared to other groups…

… are shopping around to find the cheapest prices (49%)

… are cutting down on unhealthy treats (37%)

Baby Boomers

Solution: adapting cooking habits

Most likely compared to other groups…

… are rethinking recipes to make healthy food stretch further (23%)

… are cooking from scratch more to save money (46%)

Least likely compared to other groups…

… are buying cheaper but poorer quality food (20%)

Savanta: *QGEV30b. Which, if any, of the following do you agree with when thinking about healthy diet and inflation? Inflation means…*
Base: Gen Z (n=271); Millenials (n=518); Gen X (n=498); Baby Boomers (n=713)

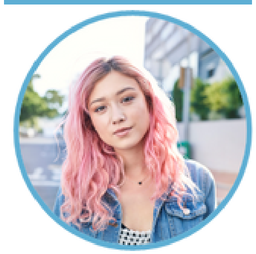
Initiatives from retailers and manufacturers to showcase good value recipes provides reinforcement for older generations and maybe some inspiration and education for younger ones

The many definition(s) of healthy food

Significantly different to previous wave at 95% confidence level

Aside from fruit and veg intake, indicators of a healthy food shop are becoming more generationally different

Top three most important considerations when shopping for healthy food items (%)



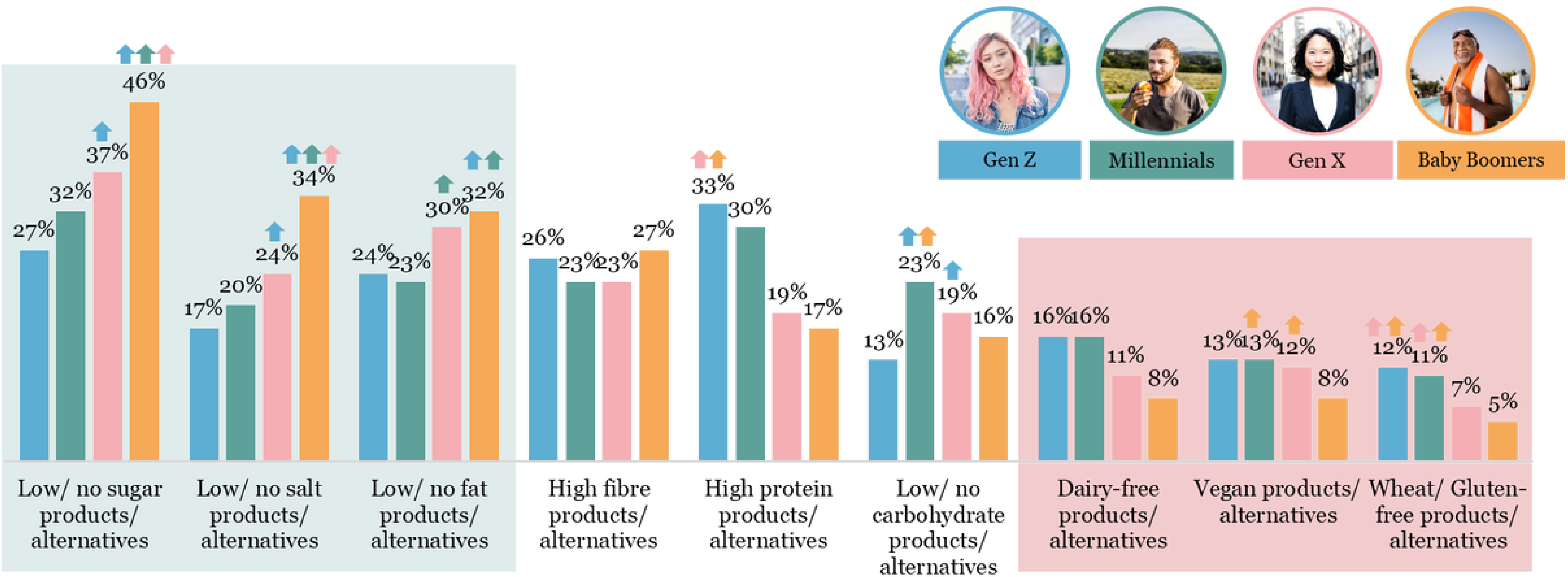

	Gen Z	Millennials	Gen X	Baby Boomers
1	Fruit & Veg content (33%)	Fruit & Veg content (36%)	Fruit & Veg content (38%)	Sugar content (50%)
2	Protein content (33%)	Sugar content (30%)	Sugar content (35%)	Fruit & Veg content (45%)
3	Calorie content (27%)	Protein content (30%)	Fat content (33%)	Fat content (41%)

Savanta: *QGEV12. If you are looking for a healthy food for yourself, which of these would be the most important considerations? Gen Z (231), Millenials (533), Gen X (489), Baby Boomers (798)*

Significantly different to previous wave at 95% confidence level

Boomers are all about no fat / no sugar and quite suspicious of the free-from 'fad'

Types of food and drink products of interest: by generation (%)



QGEV16. Which, if any, of these types of food and drink products would be of interest to you? Gen Z (231), Millenials (533), Gen X (489), Baby Boomers (798)

And Gen Z are fully embracing high protein products

33%

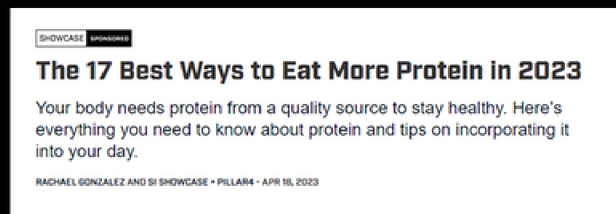
1 in 3 Gen Z's are interested in **high-protein products** double that of Baby Boomers

13%

While cutting out things, such as **carbohydrates**, is of **least importance** to them

QGEV16. Which, if any, of these types of food and drink products would be of interest to you? Gen Z (231), Millenials (533), Gen X (489), Baby Boomers (798)

And high protein diets are all over social media…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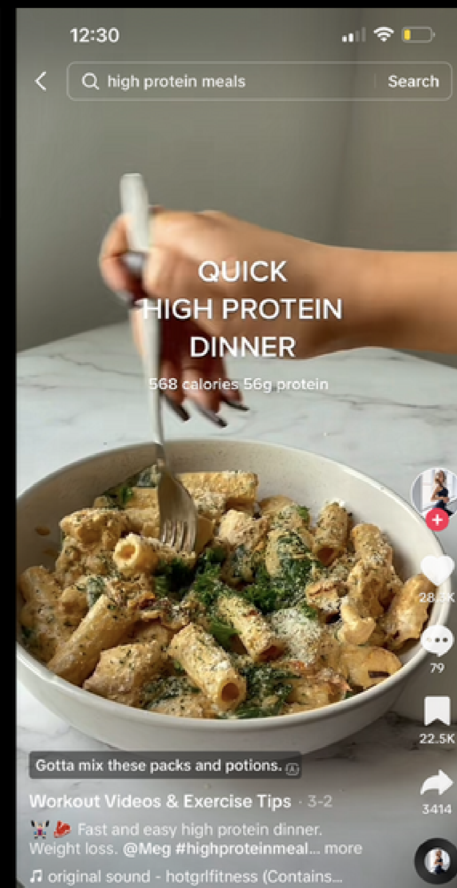
The 17 Best Ways to Eat More Protein in 2023

Your body needs protein from a quality source to stay healthy. Here's everything you need to know about protein and tips on incorporating it into your day.

RACHAEL GONZALEZ AND SI SHOWCASE • PILLAR4 • APR 18, 2023


Will protein be the next mega-trend in 2023?

By Natasha Spencer
06-Jan-2023 - Last updated on 27-Dec-2022 at 11:51 GMT



https://www.si.com/showcase/nutrition/how-to-get-more-protein
https://www.bakeryandsnacks.com/Article/2023/01/06/will-protein-be-the-next-mega-trend-in-2023

Leveraging plant-based opportunities

As headlines focus on vegan and plant-based brands' struggles…

Has the vegan bubble burst? Sales stagnate in UK as brands withdraw plant-based products

Oatly, Nestlé and Innocent Drinks are among those pulling products from shelves as figures show even Veganuary backfired

Beyond Meat Wannabes Are Failing as Hype and Money Fade

- A shakeout in once-hot sector is widening as funding dries up
- Consolidation could help winners emerge if growth rebounds

Sources: QGEV16. Which, if any, of these types of food and drink products would be of interest to you? Gen Z (231), Millenials (533), Gen X (489), Baby Boomers (798)
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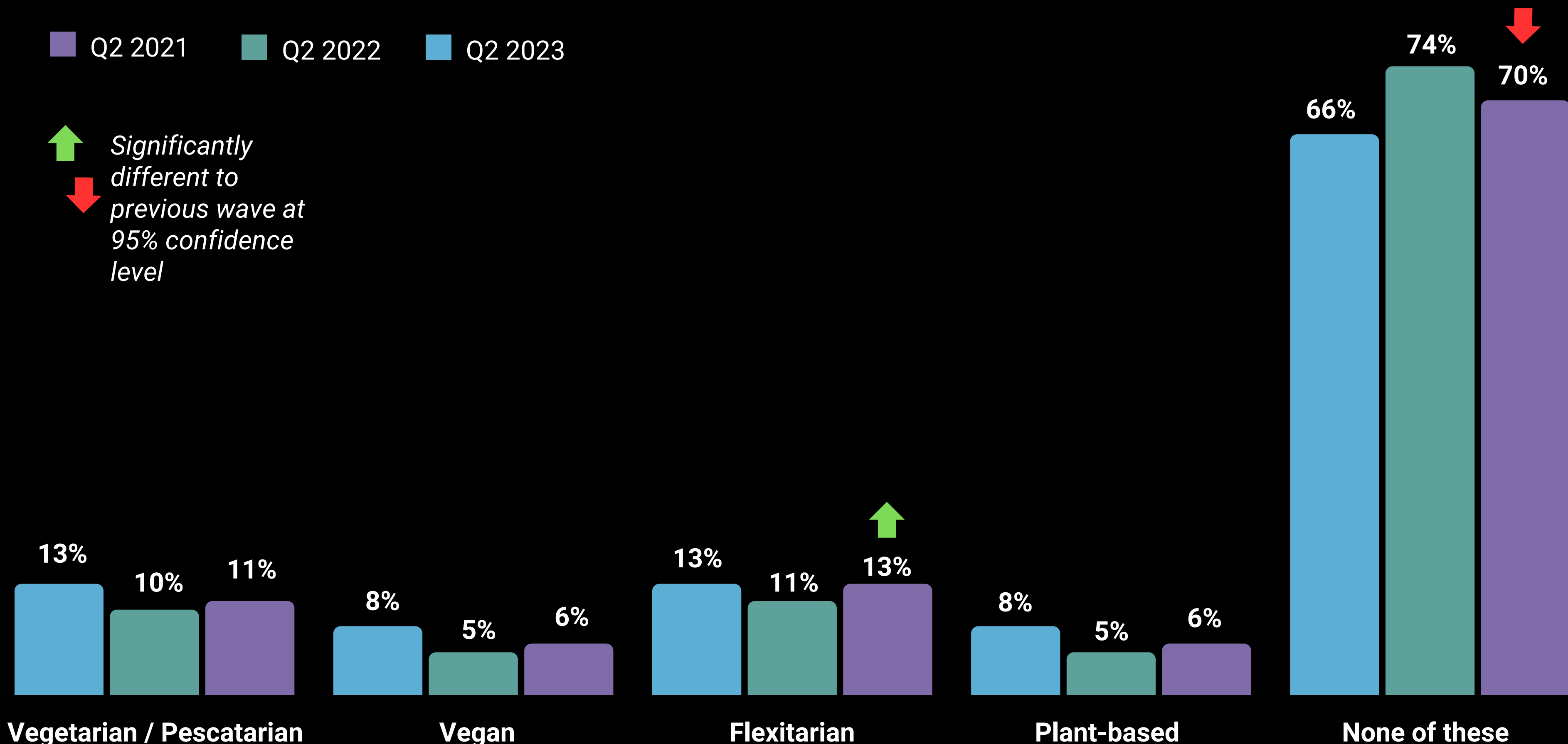
…Own Labels range seem to be more and more prominent in store

As they are not just offering **cheaper options** than their branded equivalents but in some cases, it is also undercutting meat too

One in ten consumers are now choosing plant-based alternatives because they represent better value*

** Sources: https://www.thegrocer.co.uk/plant-based/the-death-of-vegan-brands-and-saviour-of-plant-based-diets/680057.article*

This is reflected by flexitarians increasing significantly this year, while the other diets remain strong



QGEV14. Do you, or anyone else in your household, follow any of these dietary lifestyles? Total UK (n=c.2000 per wave) Baby Boomers (798)

Not everyone will convert to plant-based diets

And Baby Boomers in particular have very strong barriers which might be near impossible to break down

Barriers to plant-based diet

Baby Boomers

I couldn't live without meat	**46%**
I couldn't live without cheese	**36%**
I don't believe in the vegan philosophy	**29%**
I don't think it's a nutritious diet	**27%**
I don't think it's a nutritious diet	**27%**

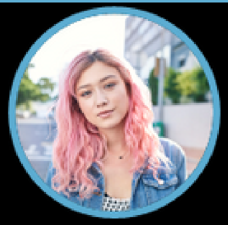
QGEV14b. You said that you don't follow any vegetarian/plant based diets mentioned previously. What are the reasons you choose not to follow a vegetarian/plant-based diet Baby Boomers (798)

But there are opportunities to grow the category with younger generations

Who have lower barriers

Barriers to plant-based diets

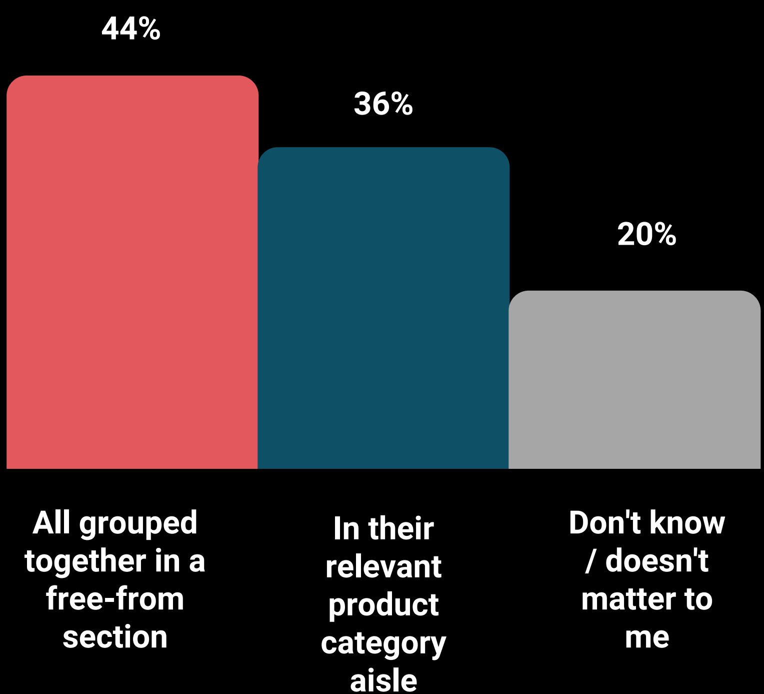
	Gen Z
It's too expensive	34%
I don't like vegan alternatives	24%
I wouldn't know what to cook	17%
It makes cooking more difficult	13%
Vegan items are difficult to find	7%



QGEV14b. You said that you don't follow any vegetarian/plant based diets mentioned previously. What are the reasons you choose not to follow a vegetarian/plant-based diet? Gen Z (231),

And expectations of placement in store reflect this, with shoppers divided on optimal location

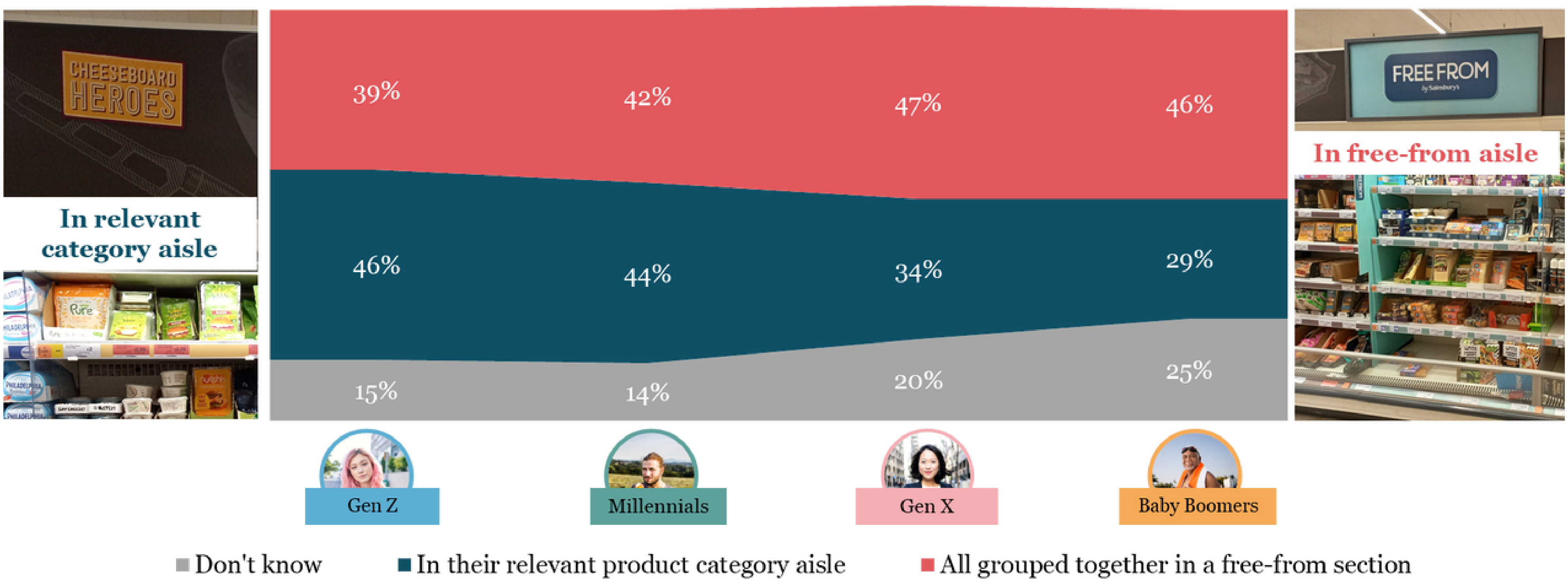
Best location for free-from products



QGEV18a. Where would you expect to see 'free-from' (vegan, vegetarian, plant-based) products placed in a supermarket? Total (n=2000)

With a clear generational divide reflecting openness to the category

Best location for free-from products



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Notes from the editor: Julie Vigne

Julie Vigne,
Senior Research Director

As observed in previous waves, this quarter's Grocery Eye results show once again that there is no one definition of healthy eating, nor one way to achieve a healthy diet.

Reassuringly, we see that consumers are less worried about the impact of the cost of living crisis on their ability to maintain a healthy diet, as they have started to find ways to adapt their shopping and cooking behaviours. However, we also see that this change is easier managed by older generations while some younger consumers are more likely to eat less – and possibly not enough - to combat food inflation.

The desire to eat healthy remains though, with strong opportunities around high protein in particular among GenZs and Millennials. As for plant-based diet, it is still going strong especially around younger generations, but with a focus on finding better value plant-based alternatives.

Our insights clearly show that understanding who your current and target audiences are remains key to NPS, comms but also activation 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?

Find out more

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Make better decisions

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Make better decisions

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

To find out more about the Grocery Eye and healthy eating, contact our Consumer Team

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