EXECUTIVE SUMMARY

ATTITUDES TOWARDS HEALTHY EATING

UK, FEBRUARY 2021

WHILST THE MAJORITY OF PEOPLE STATE THAT THEY TRY TO EAT HEALTHILY ALL OR MOST OF THE TIME, THIS IS IN STARK CONTRAST TO THE TRUE POOR STATE OF THE NATION'S HEALTH, WHICH COVID-19 HAS SHONE A LIGHT ON. THIS WIDESPREAD MISTAKEN BELIEF OF HEALTHY HABITS WILL PROVE A CHALLENGE FOR THE GOVERNMENT AS IT SETS OUT TO ENCOURAGE THE NATION TO LOSE WEIGHT. THE FOCUS ON HEALTHY EATING AND OTHER LIFESTYLE CHANGES DUE TO THE PANDEMIC WILL SUPPORT HOME COOKING LONG TERM. IDEAS AS TO HOW TO EAT HEALTHILY ON A BUDGET WILL WIN FAVOUR DURING THE INCOME SQUEEZE

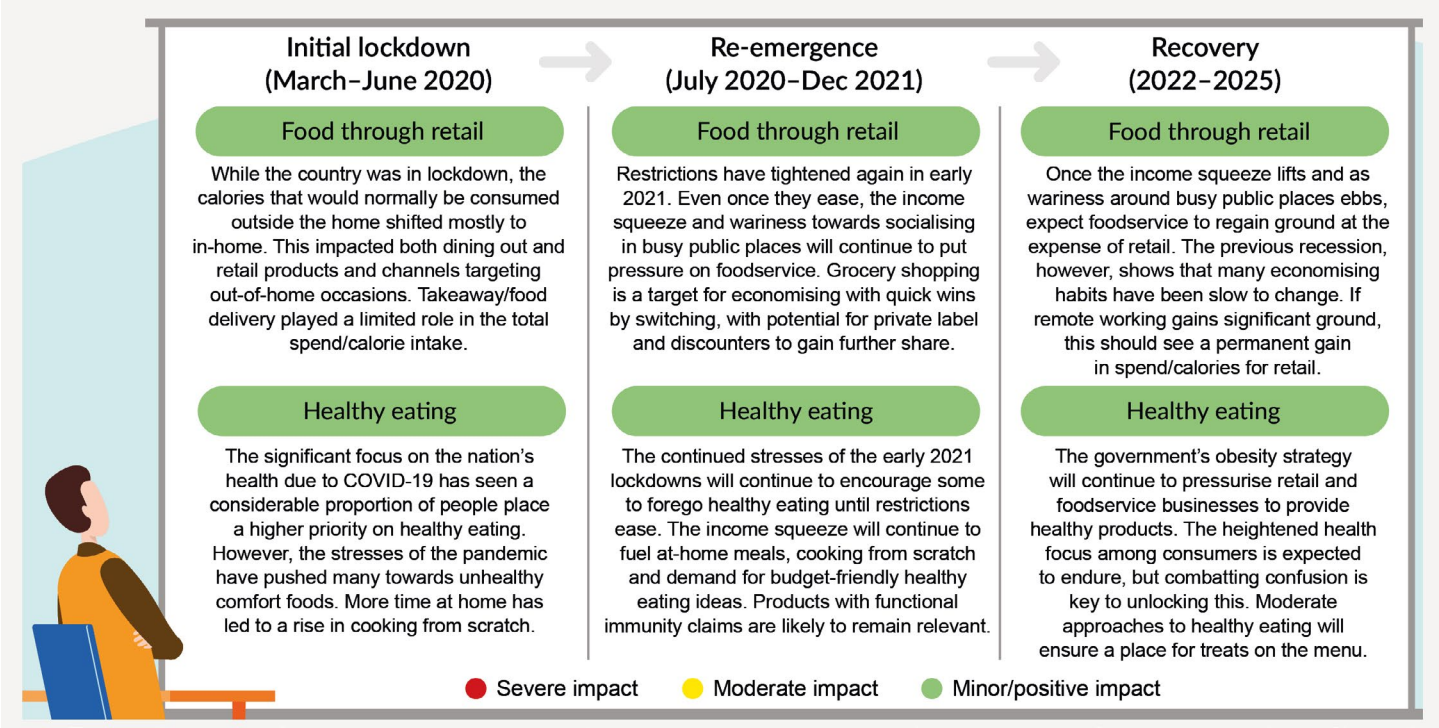
Alice Pilkington, Food & Drink Analyst

Impact of COVID-19 on healthy eating

Figure 1 provides an analysis of the impact of COVID-19 on the food category, as well as the expected impact on healthy eating. It draws on Mintel's expertise in the market, our COVID-19 consumer tracking studies, and our learnings from previous periods of market disruption.

Areas highlighted in red are expected to be particularly hard-hit, yellow reflects an expectation of significant but largely manageable disruption, and green shows that we believe the market will face only minor negative impact, or that it could stand to benefit from the changes in consumer behaviour.

FIGURE 1: SHORT-, MEDIUM- AND LONG-TERM IMPACT OF COVID-19 ON HEALTHY EATING, 19 FEBRUARY 2021



Source: Mintel

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The market

2019 sees little change in the obesity epidemic

Around two-thirds of adults in England are overweight or obese, according to the latest National Health Survey. This portrait of the nation's health is in stark contrast to 68% of people stating that they try to eat healthily all or most of the time (see Market Drivers).

New government strategy aims to get people eating healthier

The Department of Health and Social Care outlined various proposals to improve the nation's diets in July 2020. This includes a new campaign focused on achieving a healthy weight and plans to introduce legislation to end the promotion of foods high in fat, sugar or salt (HFSS) by restricting volume promotions of such foods, the placement of these foods in prominent positions, as well as other measures (see Market Drivers).

Progress on sugar and salt reduction is mixed

Limited success towards the government's 20% voluntary sugar reduction target by 2020 was revealed in October 2020. Overall, there had only been a 3% reduction across the nine food categories deemed to make a major contribution towards children's sugar intake.

Poor progress towards the PHE's salt targets was revealed in September 2020. Not a single one of the 28 broad food categories had all products under the maximum salt target set by PHE in 2014, intended to be achieved by 2017 (see Market Drivers).

Food industry tasked with 20% calorie reduction by 2024

A new strategy to reduce public calorie intake was unveiled by PHE and the DHSC in March 2018. This tasked retailers and manufacturers with reducing calories in popular everyday foods such as ready meals, pizza and pastry products by 20% by 2024. In the wake of COVID-19, PHE renewed these calls to the food industry, encouraging it to play its role in the national effort against COVID-19 and obesity (see Market Drivers).

Projected growth of older demographics between 2020-25 points to untapped opportunities

Between 2020 and 2025, the biggest increase in population is going to take place amongst the over-55s, with this group growing to 22.7 million people, or one in three people in the UK. Tapping into the particular health concerns of older demographics could help brands benefit from the increased spending power of these growing groups (see Market Drivers).

Companies and brands

Growth in L/N/R sugar claims slows in 2020

L/N/R sugar claims gathered pace across food launches over 2013-19. They lost share in 2020 but are likely to take on even greater relevance thanks to COVID-19 shining a light on the state of the nation's health and the government's new obesity strategy.

Calling out no added sugar continues to be a common theme in the snack category, particularly where snacks rely on their fruit content for sweetness. Yogurts and fromage frais are one category which has seen considerable success in sugar reduction by turning to sweeteners, with high-profile activity on this front also in cakes.

The lack of significant progress towards the 20% target of sugar reduction by 2020, and the upcoming ban on location and volume promotions of HFSS foods from April 2022, will keep the pressure on food manufacturers to prioritise sugar reduction in their innovation (see Launch Activity and Innovation).

L/N/R calorie claims lose share of NPD in 2020

Given the renewed focus on obesity and that 25% of people say the COVID-19 outbreak has made them buy food/drink products to help with weight management, L/N/R calorie claims will have gained relevance. However, these claims only featured on 1.4% of launches in 2020.

Packaging revamps and product relaunches of meals and meal centres contributed to L/N/R calorie activity during the year. Snacks also saw a lot of action in these claims in 2020, much of this coming from products using more unusual ingredients such as chickpeas and broad beans. Permissible indulgence through portion control also continued, such as the launch of smaller formats of Mars, Snickers and Twix chocolate bars at 100 calories or less (see Launch Activity and Innovation).

High/added fibre claims feature on 5% of launches

High/added fibre claims have been gaining share of launches in the food category for a number of years, though dipping in 2020, as fibre's role in both good digestive health and health overall continues to be discussed in the public arena. Linked to this, the number of launches with a functional digestive claim has also been on the rise.

Snacks, breakfast cereals and bakery products dominate launches with high/added fibre claims, helped by their often naturally high-fibre core ingredients. These claims are so common that brands have begun to call out the amount of fibre their products provide per serving to drive standout, with more leading brands also exploring inulin (see Launch Activity and Innovation).

Growth in functional immunity claims can tap into concerns brought about by COVID-19

Launches with a functional immunity claim are decidedly rare in the food category, at less than 1% of the total. The spotlight that the COVID-19 pandemic has shone on this health aspect will have contributed to a rise in launches calling out this claim in the second half of 2020. Leading brands have explored immunity claims in segments as varied as bread, plant-based milk and drinking yogurts (Launch Activity and Innovation).

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The consumer

The COVID-19 pandemic sees nearly a third place higher priority on eating healthily

The COVID-19 pandemic has transformed obesity from a long-term health concern to an immediate risk as it is linked to higher severity of the disease. This has put a heightened spotlight on the impact lifestyles can have on people's overall health (see Impact of COVID-19 on Consumer Behaviour).

Increase in cooking from scratch during 2020

With nationwide lockdowns and local restrictions keeping the nation at home during long stretches of 2020 and into 2021, there has been an increase in cooking from scratch. More cooking from scratch is predicted to be a long-term consequence of the pandemic. This underlines the competition that prepared better-for-you products are facing from scratch cooking during the outbreak, with this expected for some time to come (see Impact of COVID-19 on Consumer Behaviour).

More working from home expected in the long term

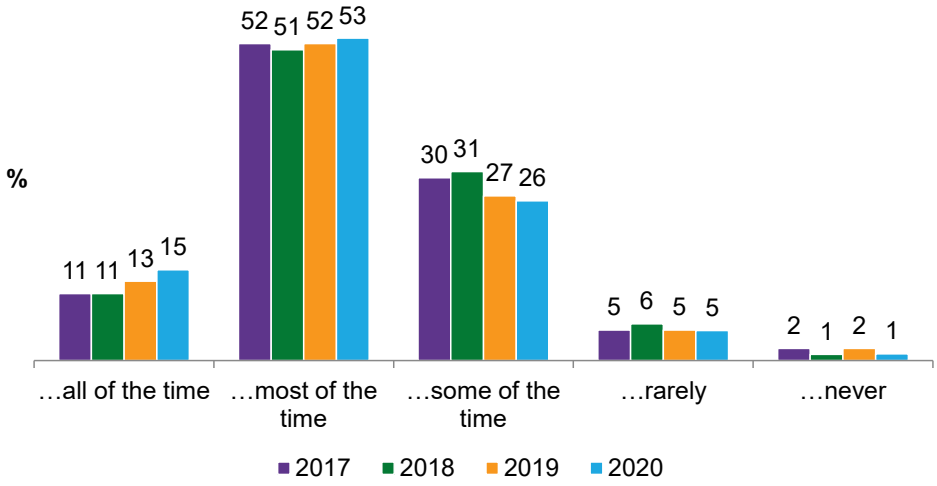
With increased working from home predicted to be a long-term consequence of COVID-19, this stands to create lasting shifts in eating habits. Avoiding the daily commute for many will mean they are in less of a rush, which 27% of people state pushes them towards unhealthy foods and drinks, suggesting opportunities for better-for-you products to tap into this sense of more time (see Impact of COVID-19 on Consumer Behaviour).

Small increase in people trying to eat healthily all or most of the time

The share of people trying to eat healthily all or most of the time has increased slightly in 2020 to 68%, up from 65% in 2019. The balance falls heavily on those stating they eat healthily most of the time, at 53%, reflecting how the majority continue to have an 'everything in moderation' attitude to their diet and continued room for occasional treats. Most people say they try to eat healthily all or most of the time, but this is in stark contrast with the true state of the nation's health, with around two-thirds of adults overweight or obese in 2019 (see Healthy Eating Intentions).

FIGURE 2: HOW OFTEN PEOPLE TRY TO EAT HEALTHILY, NOVEMBER 2017, 2018, 2019 AND 2020

"Which of the following best describes your attitudes towards eating healthily? I try to eat healthily..."



Base: 2,000 internet users aged 16+

Source: Lightspeed/Mintel

Eating five-a-day remains the most common healthy eating behaviour

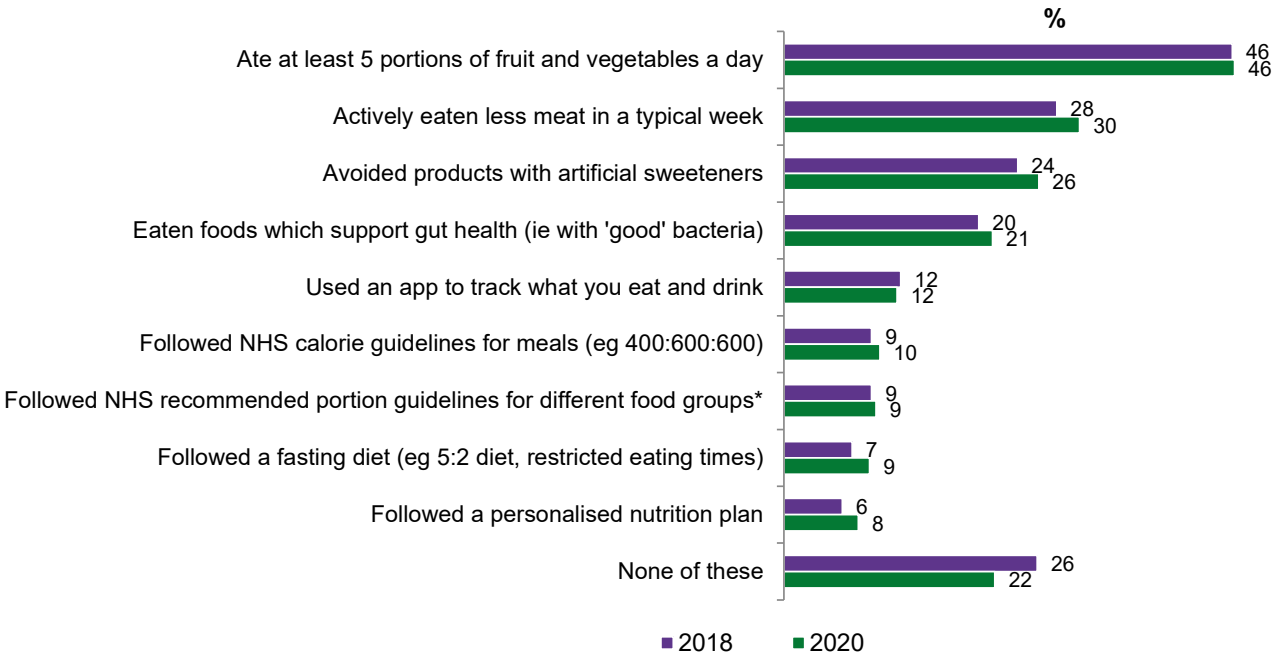
The most common healthy eating behaviour of those researched is eating at least five portions of fruit and vegetables a day, with 46% of people stating they have done this in the last six months, unchanged from 2018. Five-a-day is one of the most well-known adages when it comes to healthy eating, so it is of little surprise that it is the most widely adopted. That 54% still don't reach their five-a-day, including nearly half of those who claim to eat always or mostly healthily, highlights an ongoing opportunity for products that make it easy for people to reach this goal. Convenient formats such as ready-to-cook foods and cooking sauces and 'hidden veg' propositions could tap into people's endeavours here.

The uptake of specific NHS guidelines around diets is even lower. Only 16% of people say they have followed NHS calorie guidelines for meals or portion guidelines for different food groups. Adherence is low in part because not everyone is trying to eat healthily. Worryingly for the NHS, uptake is low, at just 35%, even among those who say they try to eat healthily all the time (see Uptake of Healthy Eating Behaviours).

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FIGURE 3: UPTAKE OF SELECTED HEALTHY EATING BEHAVIOURS, NOVEMBER 2018 AND NOVEMBER 2020

"Which of the following have you done in the last 6 months? Please select all that apply."



Base: 2,000 internet users aged 16+

* (ie The Eatwell Guide)

2018 data from Attitudes towards Healthy Eating – UK, February 2019

Source: Lightspeed/Mintel

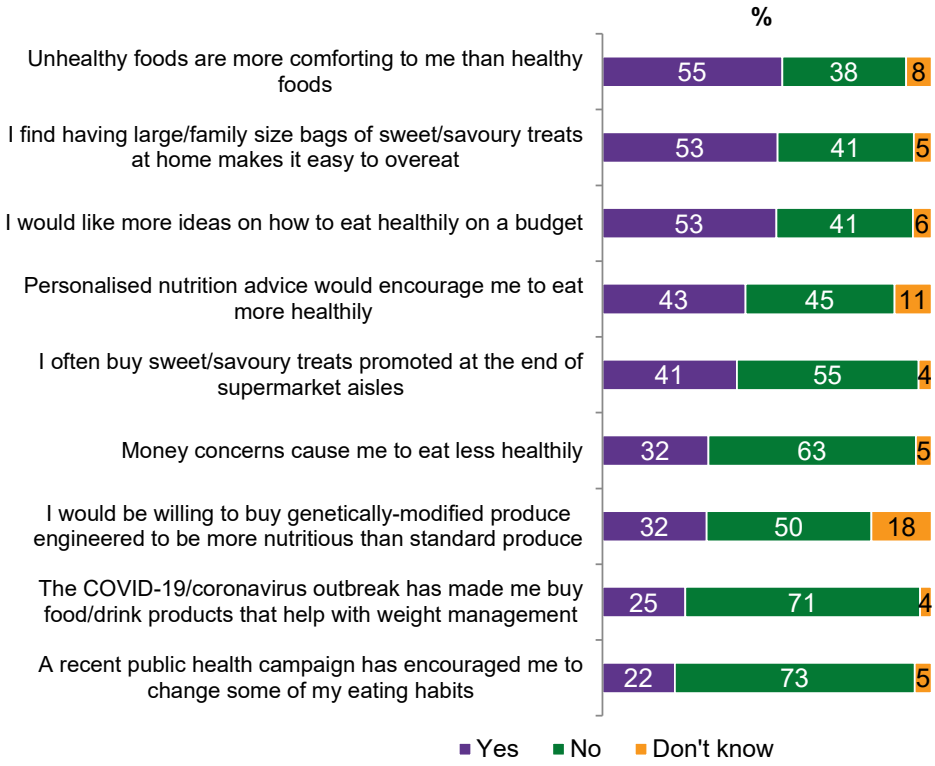
A third state money concerns cause them to eat less healthily

32% of people say that money concerns cause them to eat less healthily. The income squeeze in 2021 brought about by the COVID pandemic thus stands to pose a challenge for the government's new obesity strategy (see Market Drivers). However, 53% of people would like more ideas on how to eat healthily on a budget, signalling opportunities for the government and food industry to keep consumers engaged.

Supermarkets are well-placed to capitalise on this interest, as healthy eating advice from them is widely welcomed. Providing healthy eating guidance at the point of sale can help steer people towards better decisions at a key point in the process. Creating and advertising a 'healthy basket' – a selection of healthy foods which cater for the week and come under a set cost – offers a way for retailers to tap into this demand for inspiration (see Behaviours Related to Healthy Eating).

FIGURE 4: BEHAVIOURS RELATED TO HEALTHY EATING, NOVEMBER 2020

"Do the following statements apply to you?"



Base: 2,000 internet users aged 16+

Source: Lightspeed/Mintel

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Celebrations are top prompt to push people towards unhealthy food and drink

Celebrations such as birthdays and Christmas push 46% of people towards unhealthy food/drink. This has fallen sharply from 53% in 2017, likely due to COVID-19 reducing social gatherings in 2020. This underlines how indulgent seasonal products continue to have a role in people's diets and highlights the ongoing role of celebrations as key occasions for indulgent brands to forge links with.

The role that emotions play in prompting people to reach for unhealthy food and drink is undeniable. Considering the countless economic and health worries that COVID-19 has brought about, the role of unhealthy food and drink in providing a mood boost or reward will have been particularly relevant in 2020 (see Factors Contributing to Unhealthy Food/Drink Choices).

Healthier home-cooked versions of takeaway food appeal to 72%

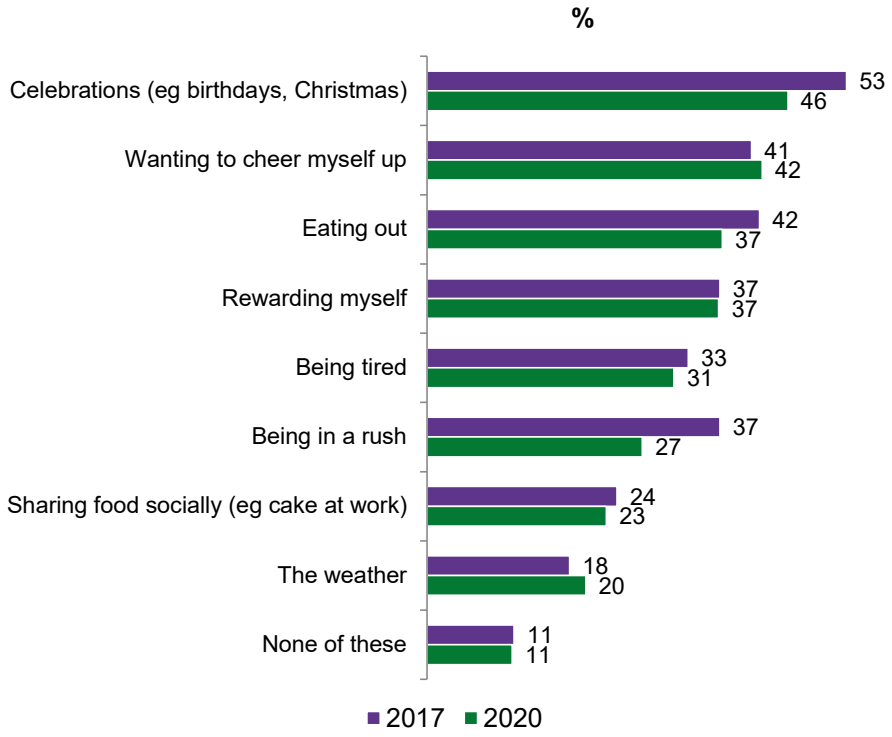
72% of people agree that healthier home-cooked versions of takeaway food are a good choice for an evening in. While 'fakeaways' are not a new concept, they provide a real opportunity for brands given the increased interest in health and scratch cooking brought about by the pandemic. The savings made by making home-cooked versions, instead of buying a takeaway from a restaurant, are also likely to chime well during the income squeeze.

Whilst the retail market offers a raft of indulgent takes on takeaway foods, there are far fewer examples of those with a healthier positioning. By combining traditional takeaway dishes with health claims, brands can stand out in this space.

63% of people agree it's difficult to know whether products with health benefits make a difference. Efficacy is the unique selling point of these products, and if consumers are struggling to see a tangible difference in how they feel, they will struggle to justify the purchase of these typically pricier products. This is likely to become all the more important for consumers as they navigate the income squeeze brought about by COVID-19 (see Attitudes Towards Healthy Eating).

FIGURE 5: FACTORS MOST LIKELY TO PUSH CONSUMERS TOWARDS HAVING UNHEALTHY FOOD/DRINK, NOVEMBER 2017 AND NOVEMBER 2020

"Which of these are most likely to push you towards eating unhealthy foods/ drinks? Please select up to 5."



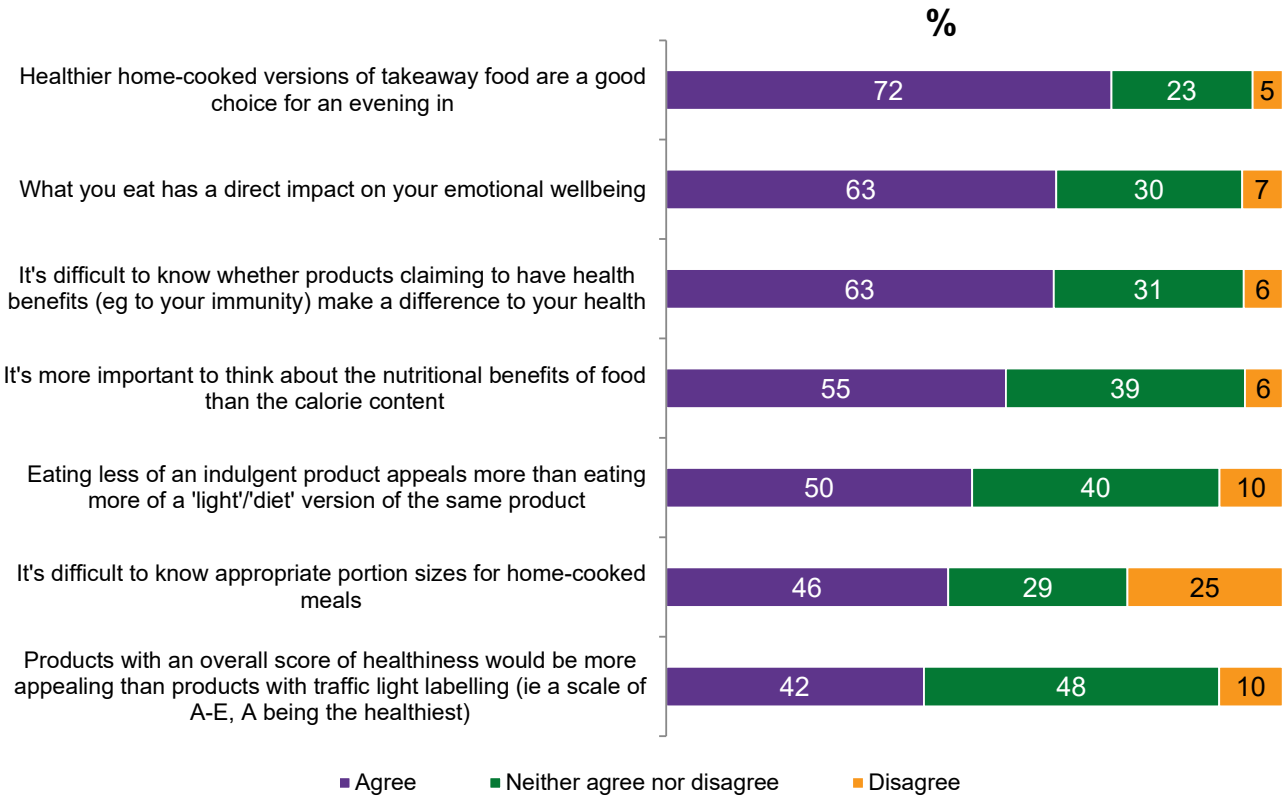
Base: 2,000 internet users aged 16+

Source: Lightspeed/Mintel

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FIGURE 6: ATTITUDES TOWARDS HEALTHY EATING, NOVEMBER 2020

"Do you agree or disagree with the following statements?"



Base: 2,000 internet users aged 16+

Source: Lightspeed/Mintel

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