

ATTITUDES TOWARDS HEALTHY EATING – UK – 2024

A renewed consumer focus on health as the cost of living crisis eases will support sales of BFY products and put pressure on those with a less healthy image.



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Attitudes Towards Healthy Eating – UK – 2024

This report looks at the following areas:

- The impact of consumers' financial situation on healthy eating
- The latest health-led NPD trends across selected food and drink categories
- An overview of consumer intentions to eat healthily
- Sources consumers learn about healthy eating from, with a focus on social media
- Attributes consumers associate with highly processed foods including opportunities to help brands cut through the UPF narrative
- Consumer behaviours and attitudes related to healthy eating, such as interest in plant variety, initiatives to support healthier food choices and the interplay between enjoyment and healthy eating.



A renewed consumer focus on health as the cost of living crisis eases will support sales of BFY products and put pressure on those with a less healthy image.

Overview

Rising living costs in 2022 led many people to reassess their spending, including on groceries. Many made the healthiness of their diets a lower priority, with a marked dip in those reporting to eat healthily all/most of the time. With consumer finances expected to improve gradually going forward, healthy dietary choices will become more front of mind. Some **42%** of food and drink buyers report that they would step up their buying of healthy food/drink products as the cost of living crisis eases.

UPFs are the latest health foe in the limelight, making headlines in 2023. This media focus has caught the attention of many consumers, **46%** having noticed news/social media stories about

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UPFs recently and **64%** thinking that highly processed foods are unhealthy. A **renewed consumer focus on health** as the cost of living crisis eases will put further pressure on brands to combat such connotations.

The benefits of eating a wide variety of plants has been spotlighted of late by industry commentators and nutrition experts. This focus on plant variety builds upon the established role of fruit and vegetables in a healthy diet. Efforts to lean into the momentum around this trend should chime, **73%** and **62%** of adults saying that eating a wide variety of plant products is important to support general health and gut health respectively.

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Report Content

EXECUTIVE SUMMARY

Opportunities

- Highly processed foods come under scrutiny, additives are consumers' top marker of processed foods
- Consumers learn about healthy eating from a variety of sources
- Plant variety trend has gained momentum but consumers deem it costly to adopt

Market dynamics and outlook

- The nation continues to see high rates of overweight and obesity
 - Graph 1: prevalence of overweight and obesity among children in Reception and Year 6 in England, 2019/20-22/23
 - Graph 2: prevalence of overweight and obesity in England, by gender, 1993-2021
- Government measures on HFSS slow to roll out
- WHO recommended against use of non-sugar sweeteners

What consumers want and why

- Commitment to healthy eating continues to grow among consumers
 - Graph 3: how often people try to eat healthily, 2017-22 and 2024
- People learn about healthy eating from a variety of sources
 - Graph 4: sources for learning about healthy eating*, 2024
- Consumer markers of processed foods diverge from industry's
 - Graph 5: attributes associated with highly processed food and drink*, 2024
- Consumers welcome support to make healthier food choices
 - Graph 6: behaviours relating to healthy eating, 2024
- Plant variety trend has gained visibility, but many deem it costly to adopt
 - Graph 7: attitudes towards healthy eating, 2024

Innovation and marketing

- Protein and fibre claims lead in food launches, fortification and calories in drinks
 - Graph 8: selected health claims in food product launches, 2018-24
 - Graph 9: selected health claims in drinks launches, 2018-24
- HFSS-compliant products continue to feature prominently in NPD
- Positive health NPD spans from the expected to the less common categories

MARKET DYNAMICS

Macro-economic factors

- Economic output has stagnated since the cost of living crisis began

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- Graph 10: GDP, 2021-23
- Inflation is still the key factor affecting consumers' finances
 - Graph 11: CPI inflation rate, 2021-23
- Interest rates expected to fall in 2024, but borrowing pressures will remain
- Food price inflation falls...
 - Graph 12: consumer price inflation for all food, 2022-23
- ... but food and drink prices still top the list of consumer concerns
 - Graph 13: "Have you been affected by any of these issues over the last two months? Please select all that apply.", 2023
- Consumer sentiment: the recovery is continuing...
 - Graph 14: the financial wellbeing index, 2016-23
- ...and people feel more confident about their financial prospects
 - Graph 15: the financial confidence index, 2016-23

Social, environmental and legal factors

- Overall overweight and obesity levels on upward trajectory
 - Graph 16: prevalence of overweight and obesity in England, by gender, 1993-2021
- Government commissioned reports paints a bleak picture of shelved health plans
 - Graph 17: prevalence of overweight and obesity among children in Reception and Year 6 in England, 2019/20-22/23
- The cost of obesity keeps the issue firmly in the government's sights
- Government measures on HFSS slow to roll out
- Impact of HFSS regulations will not be felt equally
- Media spotlight on ultra-processed foods
- UPF spotlight supports interest in home cooking
- WHO recommends against use of non-sugar sweeteners to control body weight...
 - ... and aspartame attracts media attention
- Salt reduction remains on the health agenda
- Growing consumer focus on positive nutrition
- Widespread experience of stress among consumers
- Population is growing ...
 - Graph 18: trends in the age structure of the UK population, 2018-28
- ... with the healthy ageing trend to gain momentum

WHAT CONSUMERS WANT AND WHY

Healthy eating intentions

- Consumer commitment to healthy eating grows
 - Graph 19: how often people try to eat healthily, 2017-22 and 2024
- Financial situation has a strong bearing on healthy eating

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- Graph 20: how often people try to eat healthily, by financial situation, 2024
- Improving consumer finances will support healthy eating habits
 - Graph 21: expected consumer food/drink buying in response to the to cost of living easing, 2024
- Food and drink products which marry convenience and health will chime
 - Graph 22: agreement with "It is too time consuming to follow a healthy lifestyle", by age, children and healthy eating, 2024
- Food and drink products which marry convenience and health will chime
- Bol Foods' campaign showcases the convenience it offers to time-pressed consumers

Sources for learning about healthy eating

- Consumers learn about healthy eating from a variety of sources...
 - Graph 23: sources for learning about healthy eating*, 2024
- Consumers learn about healthy eating from a variety of sources...
- ... but this varies widely by age
- Half see healthy eating media content as aspirational
- Social media has most influence among younger demographics...
 - Graph 24: sources of education on healthy eating, by age, 2024
- ... and accelerates food trends
- Tie-ups with sports professionals hold potential for boosting healthy image
- Media buzz about injectable weight loss drugs fuels consumer interest
- ...while availability remains highly limited

Attributes associated with highly processed foods

- Highly processed foods come under scrutiny
- UPFs come under scrutiny
- Highly processed foods have a negative health image among consumers
- Consumer markers of processed foods diverge from industry's
 - Graph 25: attributes associated with highly processed food and drink*, 2024
- Attributes associated with highly processed foods vary by age
 - Graph 26: attributes associated with highly processed food and drink*, by age, 2024
- Additives face the most backlash
- Communicate the benefits of processing, including how it can offer health benefits
- Flag short ingredients lists where possible...
- ... but remind consumers of the benefits long ingredient lists can have

Behaviours related to healthy eating

- Consumers welcome support for making healthier food choices
 - Graph 27: behaviours relating to healthy eating, 2024
- Consumers are split on 'nanny state' healthy eating interventions...

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- ... and expect the food industry to be proactive when it comes to health
- Kellogg's uses art to bring its sugar and salt reduction efforts to life
- Choosing healthy options in store still proves difficult for consumers
- Drive visibility of the existing guidance
- Use in-store signposting to guide consumers

Attitudes towards healthy eating

- Stress prompts consumers to search for comfort
 - Graph 28: attitudes towards healthy eating, 2024
- Twinings 'Moment of Calm' TV advert
- Remind people that healthy food and drink can play a role in supporting feel good
- Celebrate the positive emotions associated with healthy eating
- Activia links healthy eating with feeling happier
- Plant variety trend has gained momentum but consumers deem it costly to adopt
- Plant variety trend has gained buzz...
- ... but many deem it costly to adopt
- Examples of brands adopting the plant variety trend
- Address negative perceptions around the taste of naturally high-fibre foods
 - Graph 29: appeal of food and drink companies replacing some sugar with ingredients rich in fibre to support healthier choices, by age, 2024*
- Highlight compelling taste experience of naturally high-fibre foods
- Cadbury's Brunch looks to dispel poor taste associations in BFY snacking

INNOVATION TRENDS

Launch activity and innovation

- Health claims feature on a sizable minority of food and drink products
 - Graph 30: selected health claims in drinks launches, 2018-24
 - Graph 31: health-related claim categories in food product launches, 2018-24
- Protein and fibre claims lead in food, fortification and calories in drinks
 - Graph 32: selected health claims in drinks launches, 2018-24
 - Graph 33: selected health claims in food product launches, 2018-24

Launch activity and innovation – sweet treats

- Minimal non-HFSS presence and few launches with 'better-for-you' claims in chocolate
- Products with better-for-you positioning remain rare in sweet biscuits
- Small number of launches make reduced sugar claims in cakes and sweet baked goods
- Better-for-you ice cream launches range from less fat and sugar to high protein and added vegetables
- Limited non-HFSS activity in desserts

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- Positive nutrition claims feature prominently in yogurts and yogurt drinks

Launch activity and innovation – savoury foods and cereal-based products

- Crisp and savoury snack brands make use of a variety of levers to become non-HFSS
- Health remains a prominent theme in breakfast cereals NPD
- Half of cereal/snack/energy bar launches in 2023 featured high/added fibre claims
- Asda and M&S add new healthy ranges to prepared meals
- Better-for-you NPD in bread puts the focus on seed content

Launch activity and innovation – non-alcoholic drinks

- A handful of coffee launches look to offer health benefits
- Tea launches continue to mine functional claims
- LNR-calorie products account for half of launches in CSDs
- Surge in NPD with sugar-free claims in sports and energy drinks
- Sugar-free and fortification claims continue to feature in bottled water launches

APPENDIX

Report scope and definitions

- Market definition
- Abbreviations and terms

Market drivers

- Categories within the scope of HFSS regulations

Methodology

- Consumer research methodology

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