Identifying activist consumers of food

Full project de-brief

31st March 2016

Food Standards Agency

Manning Gottlieb | OMD

The purpose of this project

In 2015 MG conducted a consumer segmentation to identify different consumer attitudes to food safety, hygiene & preparation.

In line with the FSA's strategic focus on assisting consumers to create the best food future possible, an insight project is required *to improve understanding of attitudes & behaviours towards a wider set of food related topics*

With the above in mind, whilst food safety & hygiene will continue to be a topic which we analyse within our research we have not examined this in the context of the 2015 food safety segmentation.

Our proposed approach

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Stage 1: High level exploration

Desk research and social listening to enable us to identify the key topics which consumers are actively engaging with and broadly who participates

Stage 2: Deep Dive analysis

Social profiling & primary qualitative research to identify the behaviours and attitudes of consumers who are actively engaging with food topics, with a view to building a number of consumer typologies
(i.e. distinct type of activist food consumer)

Stage 3: Behavioural model development

Analysis of relevant behavioural change theory to identify a possible logic model (i.e. sequence of steps from passive to active) for activist consumers

Our overall methodology

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STAGE 1

STAGE 2

Desk research	Keller Fay Talk Track	Social listening	Primary qualitative research	Social listening
Systematic review of case studies, reports, articles and trends <u>Key words:</u> Food, eating, sustainable, eco, cost, price, technology, innovation, safety, risk	Word-of-mouth analysis based on an online survey Nat rep 16-69 years 26,000 interviews + diaries capturing **offline conversations** for 16 categories over 24 hours	Created search strings for 5 food future topics using Sysomos – data refined & cleaned to identify 10,000 relevant verbatim to analyse (2,000 per food future topic) Hashtag and keyword usage analysis across multiple platforms Audience profiling using Affinio & Facebook Audience Insights	Screener, topic guides and sample based on typologies and findings from stage 1 30 minute face-to-face in-depth interviews with 27 food activists in London, Stoke and Bristol	Built out search strings for affordability & sustainability using Sysomos and downloaded 46,800 verbatims & all of the raw statistical data to profile behaviour and influences. Facebook Audience Insights & Affinio used to identify demographics and interconnectivity of prominent influential groups

Stage 1 covers Desk research, Keller Fay Talk Track and Social listening; Stage 2 covers Primary qualitative research and Social listening.

Important notes for this project

- This project had three distinct phases. Each stage informed the next and we worked alongside the FSA to ensure findings were in line with research objectives as well as separate, external findings conducted by other research agencies. Stage 1 aimed to explore the five food future topics as defined by the FSA in the initial brief. This allowed us to refine the key food future topics to focus on for the Stage 2 deep dive, which identified key food activist segments and their consumer journey. Finally these insights were pulled through to strategic considerations.

- As this project focuses on understanding active food consumers across a set of defined food future topics, it was imperative to use social media to understand the volume, intensity and type of conversations happening in these areas. This means the relevant audience for this project is naturally younger (i.e. under 45) as this demographic tends to be most active on these platforms.

- However, to fully understand food activists in terms of what drives them and their overall journey from passive to active food consumer, we needed to apply a mixed methodology to explore areas not covered by the social analysis.

- The primary, qualitative research was conducted to these explore areas such as motivations and barriers in the journey from passive to active food consumer. We used the social analysis as a base for recruitment hence the age range of 18-44 for the respondents and the choice of key locations.

- We have identified six food activist consumers. There will be some overlap between segments, although from the existing analysis, it is not possible to give a statistical value for the overlap. However, we are looking into this to provide some anecdotal evidence of how the segments overlap.

- This project is separate to the Food Safety & Hygiene quantitative segmentation which was conducted in 2015. However, we are currently working to see if we can make any comparison with the audience segments between the two projects. As they are separate projects with different methodologies and samples, this is unlikely to be anything more than broad, proxy crossovers.

Today

- Stage 1: Re-cap of Findings
- Stage 2: Objectives & Key findings
- Stage 3: Strategic Considerations

Today

Stage 1: Re-cap of Findings

Stage 2: Objectives & Key findings

Stage 3: Strategic Considerations

A reminder of what we set out to achieve

Stage 1 research aimed to identify;

- **What** food future topics consumers are actively engaging with
- **Where** conversations about food future topics are taking place
- **Who** is actively engaging with/ influential within food future conversations

Stage 1: our methodology

Explore trends in the food landscape and consider the nature of offline food conversations

Desk Research

Relevant food future topics & 'activist consumers'

Social Listening

Identify most talked about food future topics, who is talking about them and where

- Review of articles and reports
- Industry tool survey data
- Word of mouth analysis

- Conversation volumes & engagement across social platforms
- Key words analysis across
- (last 6 months)
- Community audit & influencer analysis

Stage 1: our methodology – desk research detail

Desk research

Systematic review of WARC case studies and trends, Mintel industry reports, nVision and Trendwatching trend landscapes

Key words:
Food, eating, sustainable, eco, cost, price, technology, innovation, safety, risk

Keller Fay Talk Track

Online survey 26,000 respondents per year (500 per week)
+ Diaries capturing **offline conversations** for
16 categories
over 24 hours
Nat rep 16-69 year olds

Stage 1: our methodology - social listening detail

Locating the conversations

1/ Create search strings for 5 food future topics

2/ Refine and clean the data

3/ Downloaded a sample of 2,000 verbatim per food future and all of the raw statistical data

Reading, analysis & understanding the raw data

4/ Manually read and tagged 2,000 verbatim per topic (5 topics)

5/ Identified core sub topics from the manual analysis of the verbatim. Created new search strings of the sub topics in association to the food future category they belong to, to identify volume and SOV

6/ Look at hashtag and keyword usage of top terms associated to each food topic - across multiple platforms - to identify volume and popularity of content

Audience profiling

6/ Using Facebook Audience Insights to identify demographic segmentations of each food future topic; in addition to identifying the influencers on these groups

7/ Having ring-fenced users who have influence within the food categories; we took these twitter handles and analysed the top 500 on Affinio & Sysomos to identify trends and the interconnectivity of the prominent influential groups

* We looked in to global & UK conversations to understand the overall opportunity of each food future

Stage 1: Our findings spanned across 2 key areas

1.

Food Landscape Observations

- *Macro trends*
- *Offline & online conversation overview*

2.

Food Future Topic Overviews

- *Specific trends*
- *Online conversation deep dive*

Food landscape

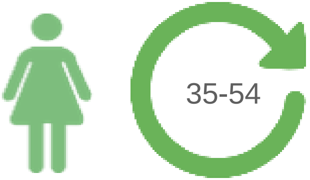
Key findings

Where?

- Food is the 2nd most talked about topic offline
- Online, food future topics generated a total of 54m conversations
- Most conversations occur on Facebook

Who?

- Offline conversationalists tends to be female, older and university educated
- Majority of offline conversations occur amongst women 35-54



What?

- In addition to food future topics 4 related, overlapping, areas of conversation emerge including: Food waste, lack of knowledge, food preparation & recipes and nutrition.
- These conversations occur on Facebook, Twitter & Instagram (platforms where consumers are highly engaged)



Source: Keller Fay TalkTrack, Sysomos, Twitter, Facebook, Instagram / 26 June 2015 – 26 January 2016

Healthy Eating
Key findings

Where?

- Healthy eating generates the largest volume of conversation – 32m
- Facebook & Instagram, which facilitate easy sharing of visual content, are key conversation platforms

Who?

- Active conversationalists tend to be female, under 35, single and living in key cities

Under 35

What?

- Fitness and healthy lifestyle make up the majority of conversations, with personal betterment arising as a key theme
- It's a cluttered topic for influencers – with health and dietary brands and personalities dominating

Source: Sysomos, Twitter, Facebook, Instagram / 26 June 2015 – 26 January 2016

Food Affordability

Key findings

Where?

- Affordability generates 9.2m conversations on a very regular basis
- Facebook and Twitter are key conversation platforms

Who?

- Active conversationalists are younger (students and young families), living in the north, with an even male: female split

Under 35

What?

- There is a clear demand for knowledge in relation to this topic. Most conversations focus on how to eat healthily on a budget and lack of knowledge of affordable recipes.
- Consumers are actively looking for / talking about tips and household management solutions. Consequently 'thrift' focused influencers are key

Source: Sysomos, Twitter, Facebook, Instagram / 26 June 2015 – 26 January 2016

Food Sustainability

Key findings

Where?

- Sustainability generates 8.9m conversations
- Like affordability the majority of conversations occur on Facebook.

Who?

- Conversationalists tend to be younger (under 35), living in London and major university cities.
- They are influenced by political / social groups

Under 35

What?

- Conversation is politically charged – with environment and education high on the agenda. Unsurprisingly social commentators and political tribes are more active within conversations
- The global footprint of the issue is apparent from key word analysis

UP WOR THY

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Source: Sysomos, Twitter, Facebook, Instagram / 26 June 2015 – 26 January 2016

Food Safety

Key findings

Where?

- Food safety generates a lower volume of conversation - around 2.5m
- Twitter and News sites are key, although conversation is relatively dispersed

Who?

- Conversationalists tend to be older males, working in healthcare and government industries

What?

- Conversation is polarised between reactive responses to food related health scares (e.g. food poisoning) and food production.
- There is continued demand for knowledge around hygiene and safety

Source: Sysomos, Twitter, Facebook, Instagram / 26 June 2015 – 26 January 2016

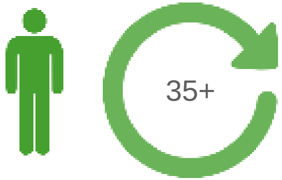
Food Technology
Key findings

Where?

- Food technology generates the lowest number of conversations – c. 999k
- Conversations occur on news sites and Twitter – ‘go to’ platforms for the latest research and tech news

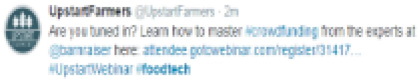
Who?

- Conversationalists tend to be male, middle-aged, working in healthcare and media professions and living in tech hubs



What?

- Conversation is business and scientifically minded – spearheaded by business and scientific tribes – and spaning several diverse sub-themes
- The global importance of this topic is apparent from key word analysis



Source: Sysomos, Twitter, Facebook, Instagram / 26 June 2015 – 26 January 2016

In summary…

	Health	Affordability	Sustainability	Safety	Food Tech
Volume of mentions / interest	32,963,863	9,236,133	8,982,755	2,528,117	991,631
Engagement Score	★★★★★ 5/5	★★★★ 4/5	★★★★ 4/5	★★½ 2.5/5	★ 1/5
Key Themes	1. Fitness 2. Foodie 3. Dieting	1. No knowledge 2. Niche Requirements 3. Expense of food	1. Products / Projects 2. Educations & Politics 3. Environment & agriculture	1. Hygiene & Safety 2. Food Poisoning 3. Food Products	1. Science of Food 2. Politics 3. Business

Source: Sysomos, Twitter, Facebook, Instagram / 26 June 2015 – 26 January 2016

We identified ‘affordability’ and ‘sustainability’ as priority topics for our stage 2 deep dive

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	Health	Affordability	Sustainability	Safety	Tech
Food nutrition (27,169,599)	✓	✓			
Food preparation & recipes (22,408,207)	✓	✓		✓	
Lack of knowledge (7,884,770)	✓	✓	✓	✓	✓
Food Waste (2,704,396)		✓	✓		✓

Today

Stage 1: Re-cap of Findings

Stage 2: Objectives & Key findings

Stage 3: Strategic Considerations

A reminder of what we set out to achieve

Stage 2 research aimed to identify;

- **Who is actively engaging/ influential within food conversations?**

Proxy definitions of key audience segments & communities
Behaviours and attitudes of consumers who actively engage

- **What are the barriers/ motivations for changing their behaviour?**

Required behaviour change

Stage 2: Our methodology

Examine key personas, motivations, influences and consumer journeys in relation to these topics

Qualitative interviews

Deep dive analysis of core food topics: Affordability & Sustainability

Social Listening

Identify who is influential/ activist in online spaces

27 in depth interviews across London, Bristol & Stoke with a range of food activist consumers 18-44

Demographic profiling
Further community analysis
Influencer analysis

radian6

sysomos

Affinio

Stage 2: our methodology – qual research detail

Qualitative

Screener and topic guides were structured around typologies and findings from stage 1

30 minute face-to-face interviews following a detailed topic guide

See appendix for detailed sample information

Stage 2: our methodology - social listening detail

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Digging deeper

1/ Build out the search strings for sustainability and affordability. Looked in to the sub categories of healthy eating and food waste

2/ Downloaded a sample of verbatim per topic and all of the raw statistical data

FORUM

Profiling Behaviours

4/ Manually read the verbatim, and identify specific topics, motivators and behaviours of users speaking within these groups

5/ Once we had categorised these users based on behaviours/ life stage, we then refined the search strings to find out more about these groups within the foot future topic

6/ Using social listening we were able to explore each audience segmentation - identifying the key topics & users they were engaged with, and what they were most influenced by

sysomos

Affinio

Identifying Demographics & Interconnectivity

6/ Using Facebook Audience Insights, we created a segmentation based on the core traits identified in the social listening insights. From this we were able to build out the demographics, likes and interests further

7/ Having ring-fenced users who have influence within affordability & sustainability; we took these twitter handles and analysed the top 500 (per group) on Affinio & Sysomos to map the interconnectivity of the prominent influential groups

* We just looked in to UK conversations to ensure that the recommendations were as relevant as possible

Summary findings – Food activist types

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Affordability – Life stages

STUDENTS

Tight budgets lead to rethinking food choices

YOUNG PROFESSIONALS

Making health driven lifestyle changes

GROWING FAMILIES

Feeding a growing family on a tight budget

Sustainability – Attitudinal variation

ECO-WORRIORS

Politically charged, Overall concern about environmental impact of food production and consumption

LOCAL-VORES

Engaged in community, established middle class

VEGETARIANS

Particularly concerned about the carbon footprint of meat and dairy production

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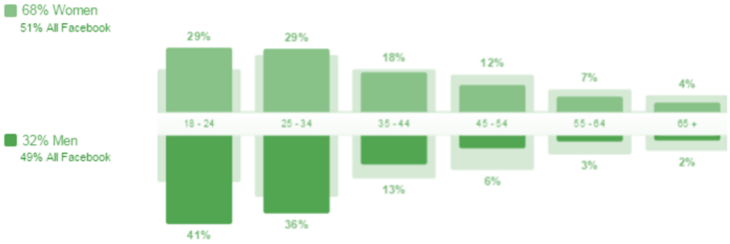
Affordability active consumers

Who is actively engaging & influential - Affordability

Female skew, more prevalent in Northern areas, determined by life-stage

Work in creative arts, blogging, marketing and students

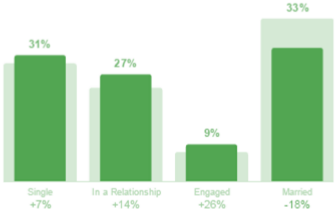
Professions	Posts
Creative Arts	43%
Blogging	16%
Student	14%
Sales and Marketing	11%
Journalism	7%
Banking and Finance	6%
Science and Research	6%
Education	6%
Executive Management	5%
Hospitality	3%



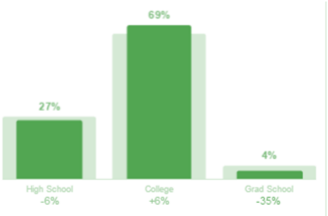
Top Locations – London, Leeds, Stoke

London	22%
Leeds	3%
Stoke	2%
Bradford	2%
Newcastle upon Tyne	2%

Less likely to be married

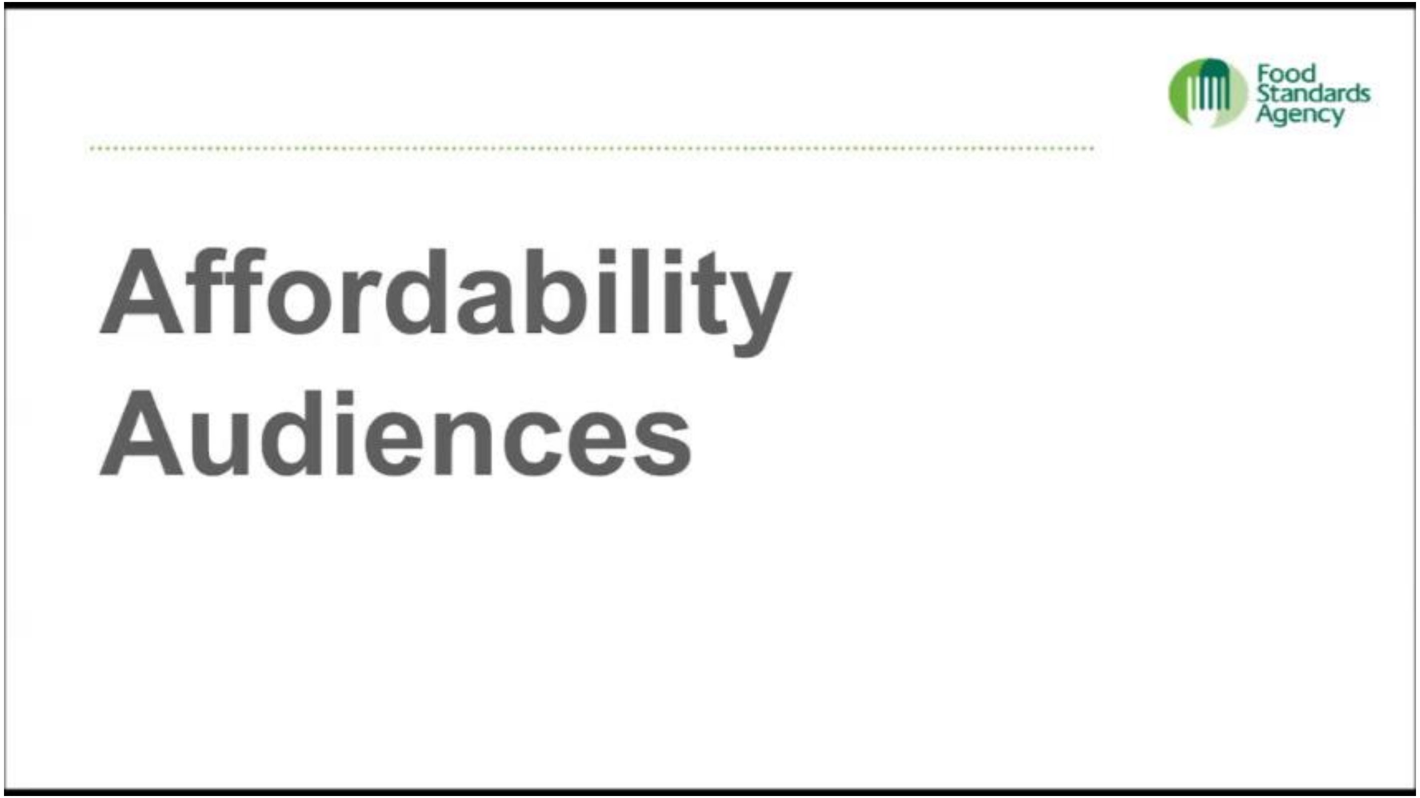


Likely to have graduated university & school



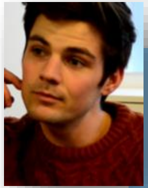
Source: Facebook / 26 June 2015 – 26 January 2016

Introducing the audience segments - Affordability



Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

Key audience segments - Affordability



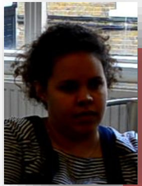
STUDENTS

Discovering a new lifestyle and freedom at university, but soon running out of money and realising they cannot have their home comforts.

Areas of concern: Lack of Knowledge and Price

Food costs… I didn't consider it, until I was a student. It was just something that you come home from school or work and then, my mum had done the shopping and it was there.

Chris, 24, London



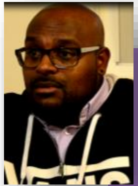
YOUNG PROFESSIONALS

Health messaging/concepts inspires them to make a lifestyle change, but want nutritious food at an affordable price.

Areas of concern: Food Waste, Lack of Knowledge, Nutrition and Price

I don't earn that much money and sometimes I really want to buy something that's good for me. I eat quite healthily, it tends to be quite expensive and that's frustrating.

Georgia, 29, London



GROWING FAMILIES

Noticing the cost of shopping bills with a growing family and more mouths to feed – needing to stretch income(s) further for future savings.

Areas of concern: Food Waste, Lack of Knowledge, and Price

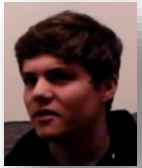
I said to the wife, 'we have to stop wasting food in this house, because we're wasting money. As we're throwing it we're wasting money away, and do you know how much it costs?

Marcus, 32, London

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

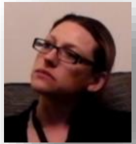
Key behaviours and attitudes

STUDENTS



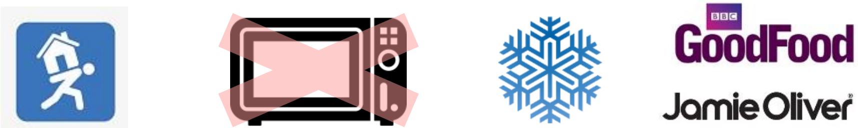
In my first year of uni I was mainly shopping at Tesco & places like that & I was getting branded foods.
Then in the past year, I've been more shopping at Aldi & Iceland & getting Aldi's own brand foods cos it's a lot cheaper
Mark, 19, Stoke

YOUNG PROFESSIONALS



I gave up alcohol for a month. I was really surprised at how it actually kick started a bit of a lifestyle change in me. So it happened as a charity thing, but then I had become more aware of how much we were spending in general and how much I was really throwing away
Zoe, 36, Stoke

GROWING FAMILIES



Since starting a family you think about costs more… we were spending more on food than anything, so we just actively started to reduce the costs.
We always cook everything at home ourselves. Everything.
Mark, 29, Stoke

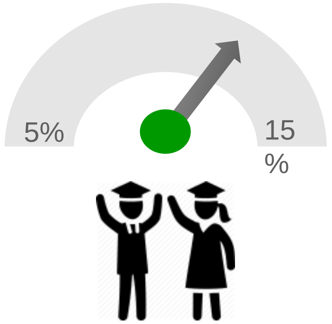
Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

Volume of conversations on affordability

Active UK Monthly Facebook Users = 1.5m
Mentions in 6 months [in UK] = 38,520

Students

The approx. average volume of conversation from students discussing affordability online

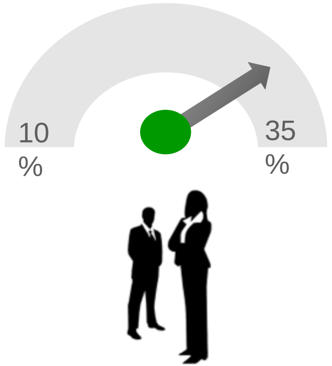


40% Men **60% Women**

Active UK Monthly Facebook Users = 3m
Mentions in 6 months [in UK] = 62,380

Young Professionals

The approx. average volume of conversation from young professionals discussing affordability online

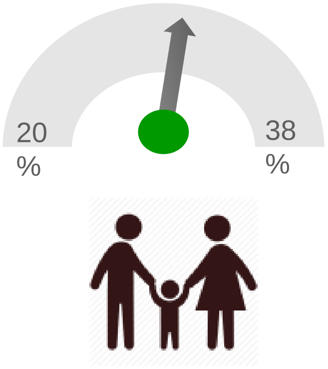


37% Men **63% Women**

Active UK Monthly Facebook Users = 1.5m
Mentions in 6 months [in UK] = 78,889

Families

The approx. average volume of conversation from families discussing affordability online



18% Men **82% Women**

Source: Sysomos, NetBase, Affinio, Twitter, Facebook / 26 June 2015 – 26 January 2016

How they talk about affordability

Students

Passion Index = **20%**

Students discuss alternative, more affordable options – and are actively seeking advice/ sharing their knowledge online

Positive:- cheaper healthy food, Europe, student prices, thrifty ways, Tesco
Negative:- Meat, education, fruit, no nutritious food, student loan, junk food, empty calorie, economy

Young Professionals

Passion Index = **75%**

People in this space talk about affordability through the lens of: politics, health, losing weight

Positive:- cheaper unbranded product, fruit & vegetables, clean food, cheap food, nutrition, tax on sugar
Negative:- harmful food additives, unhealthy food, planned childhood obesity strategy, food waste

Families

Passion Index = **55%**

Parents are active in the conversation around food; what is affordable in terms of fast-food, eating out, cooking at home – balancing cost, taste & nutrition

Positive:- healthy food, vegetables, cheaper nutritious food, planned childhood obesity strategy, good diet
Negative:- unhealthy food, price of food, cheap food, food waste

Source: Sysomos, NetBase, Affinio, Twitter, Facebook / 26 June 2015 – 26 January 2016

Key social platforms and influences

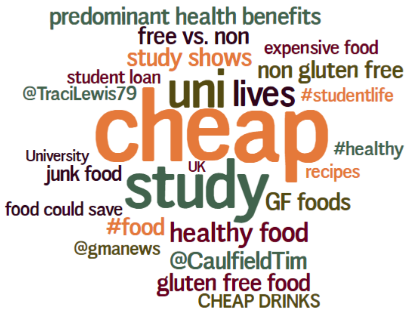
Students

Social platforms: Twitter, Facebook, YouTube, Instagram, YouTube, Snapchat

Hashtags: #studentlife #fdbloggers #freshers #healthy

Influencers: Vince Cable, Brian Cox, David Attenborough, Gareth Bale, Usain Bolt, Andrés Iniesta, Ricardo Kakà, Cristiano Ronaldo

Core themes:



Young Professionals

Social platforms: Twitter, Facebook, Instagram, YouTube

Hashtags: #SugarTax #Brexit #Nutrition #OurFoodFuture #GlutenFree #Diet

Influencers: Paul Lincoln [UK health forum], Brian Cox, David Attenborough, Kayla Itsines & Emily Skye.

Core themes:

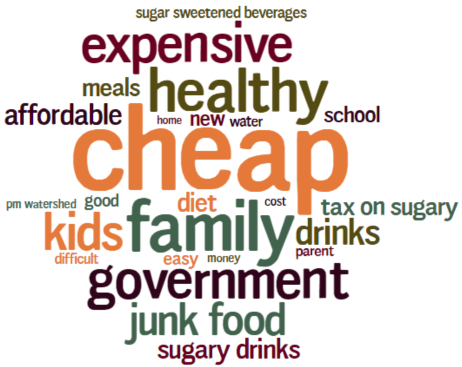
Families

Social platforms: Twitter, Facebook, Instagram, YouTube

Hashtags: #triedforless #nerveragain #freefrom #bargainshopper

Influencers: Paul Lincoln [UK Health Forum], Jamie Oliver, Daniel Patterson [LocoL], Teresa Heritage [MP]

Core themes:



Source: Sysomos, NetBase, Affinio, Twitter, Facebook / 26 June 2015 – 26 January 2016

What they talk about…

Students

"Manchester's a cheap place for students, too! Buses cost like £1 and there's cheap food available everywhere"

"A lot of my student friends are happy eating rubbish like microwave pizzas so they find grocery shopping much cheaper. Chicken, salmon, steak etc. is expensive and stockpiling healthy food in general is expensive."

"Anyone who thinks Waitrose is expensive - Learn how to shop and stop trying to buy instant food. As for people going on about 'My instant noodles blah blah I'm a student I can only afford 2 fizzy drinks a day ' - Try getting taste buds that don't resemble those of a four year old toddler."

"…in some cafeterias you get food cheaper and that's actually pretty good food for quite a low price"

Young Professionals

"Healthy eating makes food shopping so expensive 😭 😭 "

If we leave the EU we no longer have to pay billions to prop up EU farms & food will become much cheaper #Brexit

#taxonsugar #sugartax @thismorningitv just make healthy food cheaper! Fruit and veg etc... Don't increase prices, that will make it worse!

"Instead of asking why fresh food is so expensive, ask yourself why processed food is so cheap. #eatclean #nutrition"

"Is food too cheap? 78% at #OurFoodFuture conference think the answer is Yes"

"Eating healthy is cheap people are just lazy. Cook your own 2-3 meals a day instead of eating out and you'd quickly discover that"

Families

"Took the family for a nibble Debenhams cafe in Lincoln to escape the weather. Crap food, coffee and sooooo expensive. #neveragain"

"Eating out is a bit of a treat for us. A family of 5 eating out is often really expensive. The prices at Brewers Fayre, however, were fantastic."

"No! Non processed food is a lot cheaper than processed food. e.g. raw potatoes weight for weight, are cheaper than microwave chips."

"@asda Boo hiss!! #freefrom food is so expensive - why did you have to do this???"

"There's a lot of variety in tesco finest party food, 3 for 2 too, tasty food I got some really cheap to try, will update soon #TriedForLess"

Source: Sysomos, NetBase, Affinio, Twitter, Facebook, Forum / 26 June 2015 – 26 January 2016

Overall consumer journey – Affordability - ALL

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PASSIVE → **ACTIVE**

Starting Point
Life-stage change

Trigger
Realising, seeing or hearing something which makes them want to change their behaviour

First Steps
Taking action which leads to shifts in behaviour

Continued Action
Develop new habits

Positive Change
Notice positive consequences
Reinforces behaviour

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

Consumer journey – Students

Starting Point

Moves out of family home and starts university – living in shared accommodation

Trigger

1. First shop without parents
2. Running out of money

First Steps

1. Actively start to look at how they can reduce food costs
2. Tries unbranded items
3. Tries cheaper food grocers on campus

Continued Action

1. Sticks with unbranded items – '*stick with weird taste & it soon becomes the norm*'
2. Continues to shop at cheaper shops
3. Starts planning ahead - bringing in packed lunches to lectures

Positive Change

1. Learns how to survive on their own
2. More money for other activities e.g. socialising

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

Consumer journey – Young Professionals

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Starting Point

Earning their own money, managing a household, disposable income

Trigger

1 Awareness of messages around them and peers talking about health

2 Single person income / home

First Steps

1 Starts researching how to eat healthily but not expensively

2 Takes up a new challenge e.g. Dryathlon

3 Starts making more food from scratch

Continued Action

1 Learns how to make nutritious food from scratch

2 Becomes more aware of fresh food that is wasted

3 Becomes more creative with how to cook with food to reduce waste

Positive Change

1 Sees tangible weight loss

2 Feels healthier

3 Saves money

4 Becomes a new lifestyle norm

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

Consumer journey – Growing families

Food Standards Agency

Starting Point

Living with partner/Married, starting a new family or recently adding another baby to the brood

Trigger

1. Realising another mouth to feed is hard work and expensive!
2. Analysing bank statements – shock at £100-150 weekly shopping bills
3. Throwing away lots of unused food

First Steps

1. Switches supermarkets – shop at alternatives like Aldi & Lidl
2. Starts batch cooking food for week ahead – freezing portions
3. Learns new recipes

Continued Action

1. Starts experimenting with recipes
2. Starts tapping into ethnic stores e.g. Chinese/Indian supermarkets for bulk buying
3. Becomes more creative with leftovers

Positive Change

1. Increased confidence in the kitchen
2. Develops key cooking skills – a master and creative
3. Wastes less food
4. Saves money

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

Key motivations

Want to save money!

Want to better themselves

Want to share positive change

STUDENTS

Learning about different brands and alternative shopping locations

YOUNG PROFESSIONALS

Feeling **healthy**, being more **creative** in their food choices and recipes

GROWING FAMILIES

Seeing noticeable reduction in food bills

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

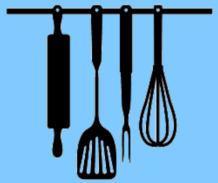
Key barriers

Food Standards Agency

- Need to plan
- Time consuming
- Monotonous
- Cheaper store limitations
- Can feel ‘anti-social’

STUDENTS

Lack of utensils / storage



YOUNG PROFESSIONALS

Cooking for one too much effort
Initially eating healthy seems too expensive

GROWING FAMILIES

Relying on partner for support

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

Key knowledge gaps…

Trusted website

'How to…'

Tools

STUDENTS

Website - for how to make cheap, affordable but healthy food – aimed at students

How to:
Make dishes cheaper, which ingredients to substitute, where to buy

Tool – comparison of cheaper 'supermarket own brand' versus established brands

YOUNG PROFESSIONALS

Website – with information not just aimed at families

How to:
Waste less e.g. being able to pick your own rather than using a whole packet
Recycle leftovers

GROWING FAMILIES

Website – how to reuse food, recipes for leftovers

How to:
Create store cupboard essentials
Make meals with just one ingredient e.g. mince
Be creative with the basics

Tool - budget visualisation tool

Source: Primary qualitative research; depth interviews in London and Stoke 15 March – 17 March 2016

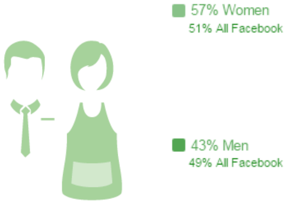
Sustainability active consumers

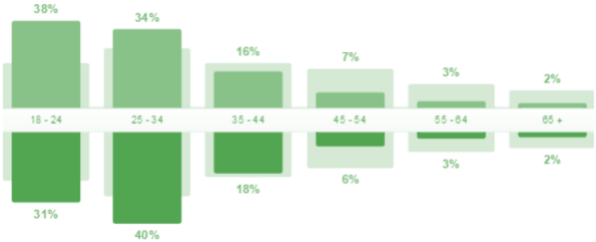
Who is actively engaging & influential - Sustainability

18-34, less likely to have kids in HH, found in key locations in the UK, work in creative industries

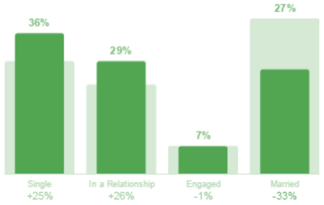
Work in creative arts, media, finance or education

Professions	Posts
Creative Arts	35%
Sales and Marketing	14%
Science and Research	14%
Banking and Finance	14%
Student	11%
Blogging	9%
Executive Management	7%
Education	7%
Journalism	4%
Hospitality	4%

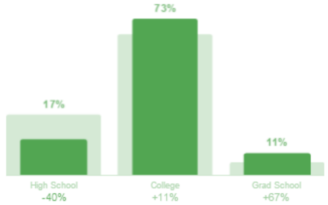




More likely to be single or in a relationship



More likely to have graduated



Top Locations – London, Bristol, Edinburgh

London	36%
Bristol	3%
Edinburgh	3%
Belfast	2%
Brighton	2%

Source: *Facebook / 26 June 2015 – 26 January 2016*

Key life-stages for Sustainability segments

STUDENTS

Making new friendships
Living with people with ‘different’ people
Moving to a new/urban area
Critical thinking/debating
Breaking family customs

I've definitely become more aware of what I'm eating and where the food's coming from, particularly since I'm now buying my food rather than my mum.
We started buying meat from the butchers rather than from the supermarket, because they would tell us exactly where the meat was from, and it's all well looked after and organic.
Lucy, 19, London

YOUNG PROFESSIONALS

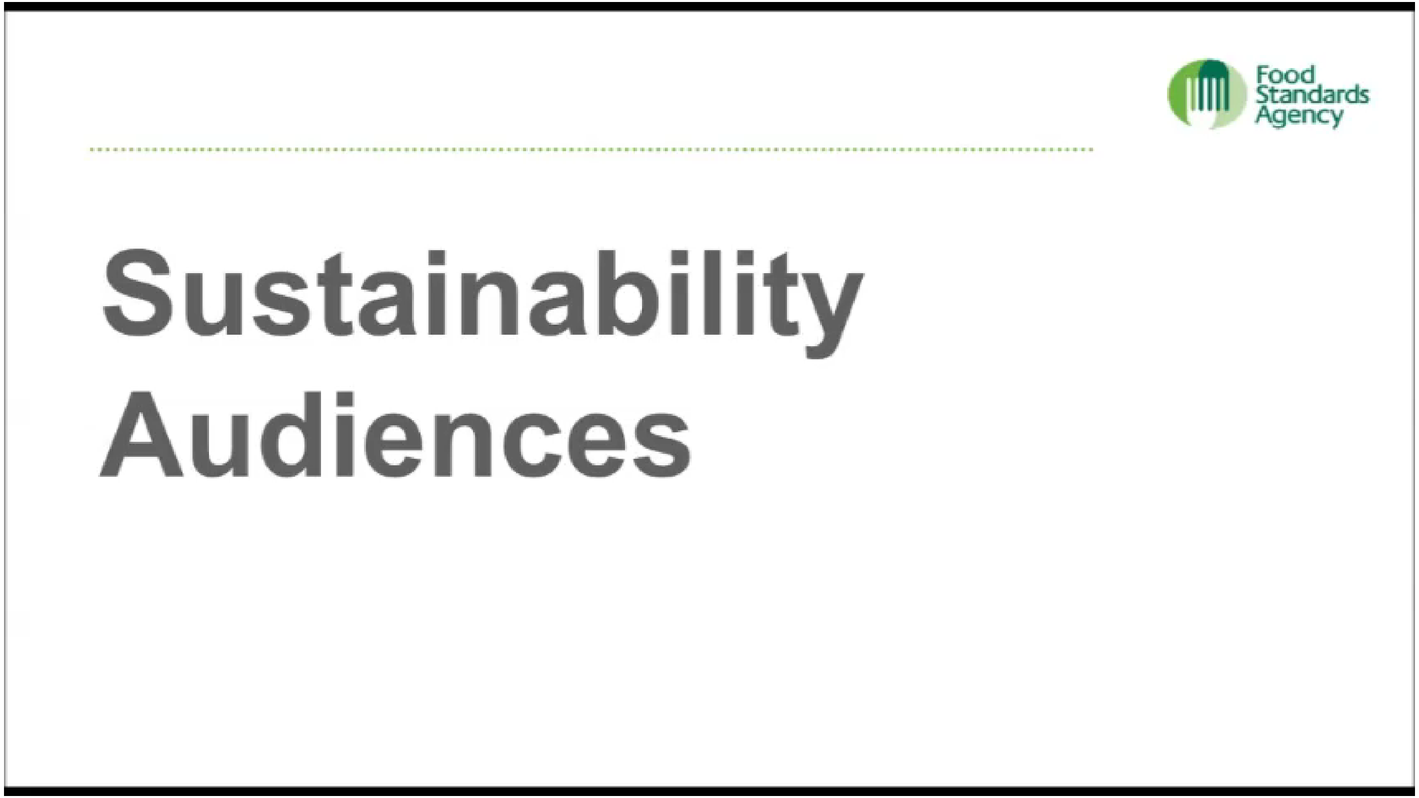
Less peer pressure
Able to afford sustainable life choices
Living independent
Being responsible

What it all boils down to, for me, really is just being able to help the local economy, local businesses, local producers and local farmers.

Simon, 31, Bristol

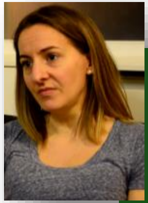
Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Introducing the audience segments - Sustainability



Source: *Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016*

Key audience segments - Sustainability



ECO-WORRIORS

Generally concerned about the environmental impact of food consumption. Savvy recyclers and resourceful with food – eating what's at the back of the fridge/cupboard and plan ahead

Areas of concern: Waste and 'what goes in the food'

There are certain products or certain brands and things that I wouldn't buy because I don't really like the way that they're produced or processed or the farming behind it.
Anna,34, London

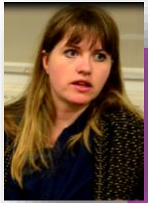
LOCALVORES

Interested in food provenance and seasonality.
Shop locally and frequently rather than in bulk.
Buy seasonal fruit and vegetables

Areas of concern: Food knowledge about local shops, seasonal produce, food provenance

I'm trying to buy stuff that's produced in England at the right time for England.

Lucy, 32, London



VEGETARIANS

Avoid meat because of its carbon foot print and unsustainable fish. Weigh up cost of sustainable meat/fish v being vegetarian

Areas of concern: food knowledge about environmental impact of eating meat, diary and unsustainable fish

I've been a vegetarian on and off since I was thirteen years old. It's knowing that the alternative is so much healthier. Meat being that default, and actually finding other amazing foods to eat that do so much better.
Charlotte, 30, London

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Key behaviours and attitudes

ECO WORRIORS

I start to understand a bit more about where meat comes from, and the production of it, factory farming, and the supply chain, that just, kind of, reinforced my ideas.
Jordan, 24, Bristol

LOCALVORES

I try and avoid the big supermarkets I'd rather my money goes to a local business. I do speak to them about where their produce comes from and a lot of them use local farmers or they try and source their goods locally.
Simon, 31, Bristol

VEGETARIANS

The older I got, the more I realised I didn't like the thought of what I was eating. I never really was one big meat eater, but by two years ago, I just made my own stuff, looked at recipes online and just went along with that.
Gemma, 22, Bristol

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

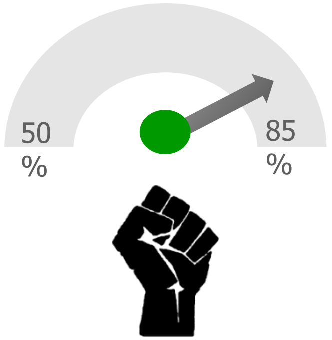
Volume of conversations on sustainability

Food Standards Agency

Active UK Monthly Facebook Users = 950,000
Mentions in 6 months [in UK] = 120,623

Eco-worriors

The approx. average volume of conversation from eco-warriors discussing sustainability online

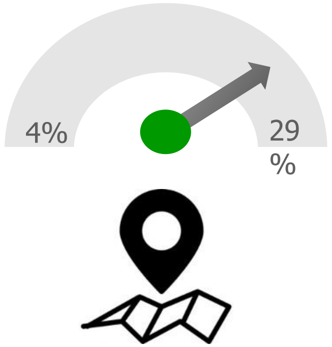


45% Men **55% Women**

Active UK Monthly Facebook Users = 1.2m
Mentions in 6 months [in UK] = 58,890

Localvores

The approx. average volume of conversation from local-vores discussing sustainability online

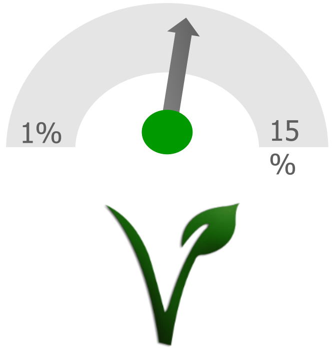


30% Men **60% Women**

Active UK Monthly Facebook Users = 2m
Mentions in 6 months [in UK] = 28,520

Vegetarians

The approx. average volume of conversation from vegetarians discussing sustainability online



25% Men **75% Women**

Source: Sysomos, NetBase, Affinio, Twitter, Facebook, Forum / 26 June 2015 – 26 January 2016

How they talk about sustainability

Eco-worriors

Passion Index = **95%**

People active in this space use a mixture of positive and scare tactics to encourage people to change their views/ behaviours.

Positive:- healthy food/ planet, fair trade, cross-sector cooperation, traditional method, eco housing, joint action, sustainable land management

Negative:- powdered food, imported goods, industrialized meat production, cheap food, lack of education, omnivore, food waste

Localvores

Passion Index = **85%**

People active in this space share positive stories, or have a supportive approach to encouraging people to come round to their cause.

Positive:- Local food, #FreeTrees, ethical food, grow your own, fresh food

Negative:- energy, farming, fishing, agriculture policy, city living, food waste

Vegetarians / Vegans

Passion Index = **55%**

People active in this space are passionate about the positive impacts being a vegetarian/ vegan is on the planet – sharing positive and negative stories to encourage people to change

Positive:- Eat bugs, tasty vegan food, animal agriculture, recipes, sustainable food, diet

Negative:- plant farm, impact on environment, much less choice, locust, lack of education, agriculture

Source: Sysomos, NetBase, Affinio, Twitter, Facebook, Forum / 26 June 2015 – 26 January 2016

Key social platforms and influences

Eco-worriors

Social platforms: Twitter, Facebook, YouTube

Hashtags: #nutrition #sustainability #sustainable #ag

Influencers: Raymond Blanc, Jason Clay, Mark Eisner, Simon Heaps, Dr Gail Barnes

Core themes:

Localvores

Social platforms: Twitter, Facebook, Instagram, Tumblr

Hashtags: #freetrees #letsgrow #local #health #urbanagriculture #organic #artisan #water #fishtofork

Influencers: Natalie Savona [BBC 3 show presenter], Dr Richard Swannell, Joe Goldberg, Alex Aitken, Kayla Itnes

Core themes:

Vegetarians / Vegans

Social platforms: Twitter, Facebook, Instagram, Tumblr, YouTube

Hashtags: #vegetarian #vegan #veganuary #veganuary2016

Influencers: Alice Waters, Edyn Mackney, Mark Bittman, Rupert's Street, Frankie Boyle

Core themes:

Source: Sysomos, NetBase, Affinio, Twitter, Facebook, Forum / 26 June 2015 – 26 January 2016

What they talk about…

Eco-worriors

"Cheap food is destroying the planet, = farmers poor + animal welfare problems"

"Sheep or cattle eating grass in open fields is one of the most sustainable and environmentally friendly foods on the planet. Yes, animals can also be intensively reared on grain and I don't support that or buy it."

"If you can eat less meat you're doing the planet a favor. Industrialized meat production is not sustainable."

"Simply put, the way we grow food now is not efficient enough to feed the growing population we have. Agriculture as it is is massively land, water and pesticide intensive and while solutions such as crop rotation and other sustainable farming solutions are used and do help, I think they're still only a stepping stone. I don't have figures or the time to look up how much farming on the planet actually uses sustainable methods, but I'm willing to bet the number is pretty damn low."

Localvores

"It can't be done in a day, far from it, but what Sustainable Food Lancashire is trying to do will be useful to make our food more local.' The Sustainable Food Lancashire Charter Promote healthy and sustainable food to the public"

"Southern exploration pays off! @TheStrawKitchen #Warwickshire lovely local sustainable food!"

"Great post about a shining example of a sustainable farm enterprise and local food system!"

"New illustrated map of Edinburgh featuring best places to eat and buy local and sustainable food in the city is launched."

"The challenge for the next mayor - decarbonising the food system. More local, sustainable, innovative #capitaloffood"

Vegetarians / Vegans

"Nice thing about being vegan: "Oh yes, eating bugs are the sustainable choice of the future… But I'm vegan, so…"

"8 years ago I became vegetarian - a lot down to @TishToshBosh & the #sustainability of meat eating. A happy choice! #WorldVegetarianDay"

"Just had great vegetarian lunch at @ChathamHouse #CHFoodFuture event: sustainable food means diet shift to less meat and dairy"

"I think I could probably lead a vegan lifestyle without too much heartbreak, but I wish we could place more emphasis on making meat and dairy farming more sustainable, rather than encouraging people to cut them out altogether."

Source: Sysomos, NetBase, Affinio, Twitter, Facebook, Forum / 26 June 2015 – 26 January 2016

Overall consumer journey – Sustainability - ALL

PASSIVE → **ACTIVE**

Starting Point	Trigger	First Steps	Continued Action	Ongoing challenge
Accumulated latent knowledge about sustainability	1 Becoming independent 2 Earning more money 3 New location sparks new behaviour	Shifts in awareness, attitudes and behaviours	1 Develop food shopping and cooking behaviours 2 Continue to improve knowledge	Generally positive endpoint but still feel like there is more 'work to do'

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Consumer journey – Eco-worrier

Food Standards Agency

Starting Point

Accumulated latent knowledge about environmental issues

Trigger

Watching documentaries about mass food production

First Steps

1. Proactive recycling
2. Conscious shopping, i.e. only when needed
3. Being less picky about back of the pantry

Continued Action

Less visible waste

Ongoing challenge

Making decisions between contradicting behaviours, e.g. driving (further) for eco-friendly produce

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Consumer journey – Localvore

Starting Point

Eco conscious upbringing about seasonality, provenance and organic foods

Trigger

1. Finding your feet
2. New area
3. More money

First Steps

Going to local butcher
Visiting farm shops

Continued Action

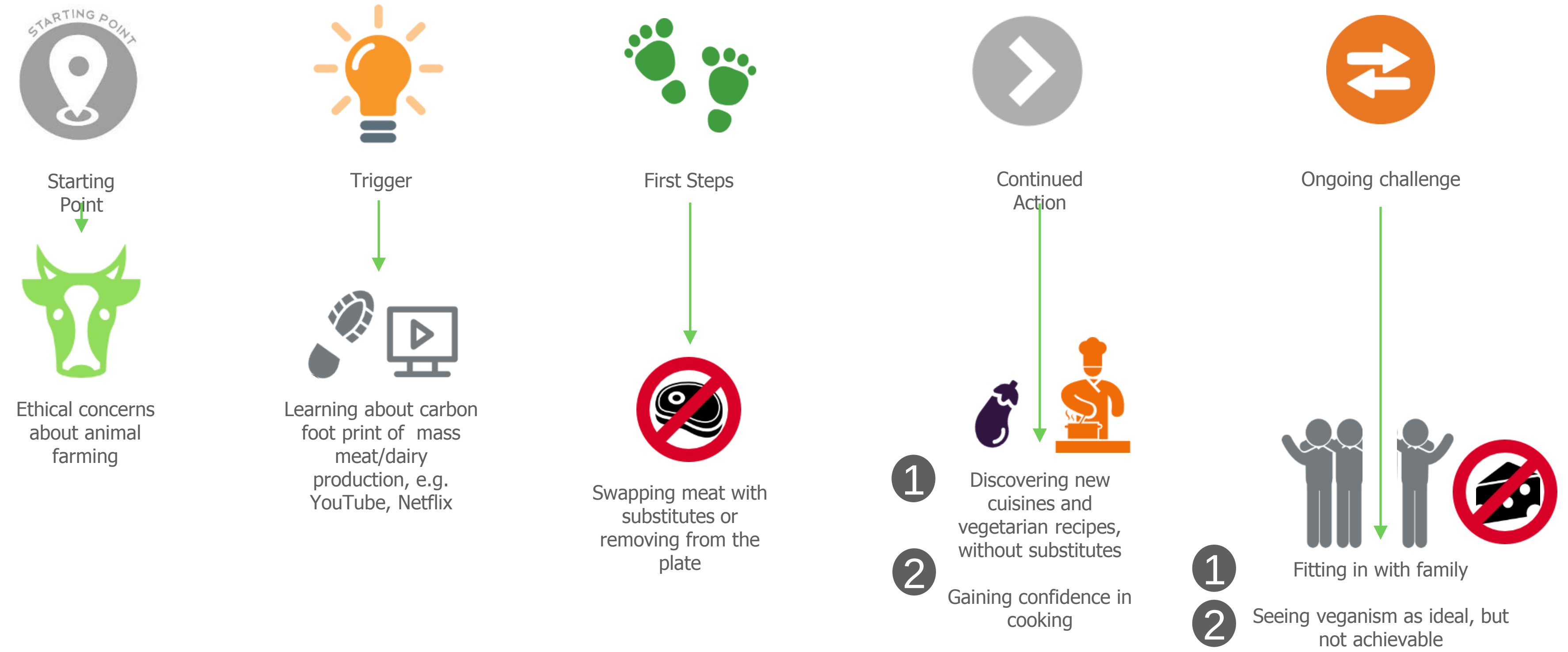
1. Talking to others about quality and health benefits
2. Buying seasonal
3. Finding cheaper ways to shop locally, e.g. wonky vegetables

Ongoing challenge

1. Finding food staples locally
2. Knowledge about seasonality
3. Convenience and affordability

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Consumer journey - Vegetarian



Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Key motivations

New relationship or friendships

Watching documentaries

Want more responsibility and independence

ECO-WORRIORS

Reduce own environmental impact
Be resourceful
Mindful that other people have less

LOCALVORES

Perceived healthier and higher quality
Support local economy
Reduce carbon foot print of food journey and shopping trip

VEGETARIANS

Reducing carbon foot print of food
Perceived health benefits and quality of food
More affordable than 'sustainable' animal products

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Key barriers

Lack of knowledge | Affordability | Status Quo | Access

ECO-WORRIORS

Wary of contradiction & not making a difference
Lack of facilities

LOCALVORES

Time & effiort
Distance to shops
Choice
Expense
Information

VEGETARIANS

Fear of being awkward
Surroundings
Lack of knowledge
Partner / Friends
Habit
Don’t want to preach

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Key knowledge gaps

Food Standards Agency

How to…

Where to eat

ECO-WORRIORS

Where supermarket waste should be regulated and communicated
Affordable sustainable food choices

LOCALVORES

Local food staples, e.g. breakfast cereal
Functional information on local shop

VEGETARIANS

Affordable sustainable fish/meat
Guidance for healthy vegetarian diet
Vegetarian options in all areas of the country

Source: Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Summary of audience segments

	Affordability			Sustainability		
	Students	Young Professionals	Growing Families	Eco-worriers	Localvores	Vegetarians
Amount of active users & mentions – demonstrates the whole opportunity	1,538,520 active	3,062,380 active	1,578,889 active	1,070,623 active	1,258,890 active	2,028,520 active
Passion intensity	**20**	**75**	**55**	**95**	**85**	**55**
Need for knowledge – High/Medium/Low	**High**	**Medium**	**High**	**Low**	**Medium**	**High**
Food Waste – Passionate/ Concerned/ Agnostic	**Agnostic**	**Concerned**	**Concerned**	**Passionate**	**Passionate**	**Concerned**
Barriers to change	Lack of cooking facilities and storage	Effort of cooking for one Expensive to eat healthier	Relying on partner for support	Not able to make a difference Conflicting behaviours	Time and effort Distance to local shops Choice at local shops	Stigma Boring alternatives Relying on partner/family
Motivations to continue	Learning about alternatives to shop	Feeling healthier	Seeing reduced food bill	Less waste More resourceful Reduced carbon footprint	Higher quality Feeling healthier Supporting local economy	Feeling healthier Improved cooking skills Reduced carbon footprint

Source: Sysomos, NetBase, Affinio, Twitter, Facebook, Forum / 26 June 2015 – 26 January 2016 & Primary qualitative research; depth interviews in London and Bristol 15 March – 17 March 2016

Today

Food Standards Agency

Stage 1: Re-cap of Findings

Stage 2: Objectives & Key findings

Stage 3: Strategic Considerations

Strategic Considerations

Client Brief: Create an environment in which consumers are encouraged to be active players in creating the best food future possible for them

MG OMD Strategic Task: Propose a behavioural framework that encourages consumers to be more empowered when making decisions about their food future. Specifically this model should outline how to shift consumers from a passive to active mind-set and behaviour when considering food affordability and food sustainability.

Our insight work has highlighted key themes to be mindful of when proposing the most effective model

- There are certain triggers (often life stage based) that motivate active choices on food affordability and food sustainability
- Multiple influencers at play - personal, social and societal
- People are results oriented – if they can see the positive difference, they are more motivated to keep up the good work
- Small positive changes are empowering
- Overwhelming need for ‘help’ and ‘support’ – providing people with the ability to make smarter choices

In summary, these themes can be reduced to two key factors that influence change: ability and motivation

MOTIVATION:

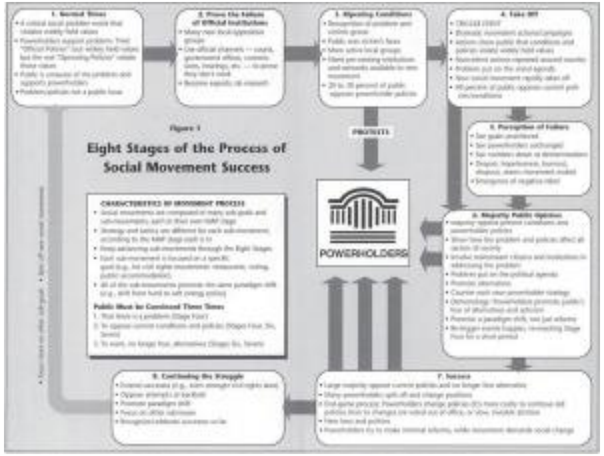
Make me want to take on this difficult task

ABILITY:

Help me to do it

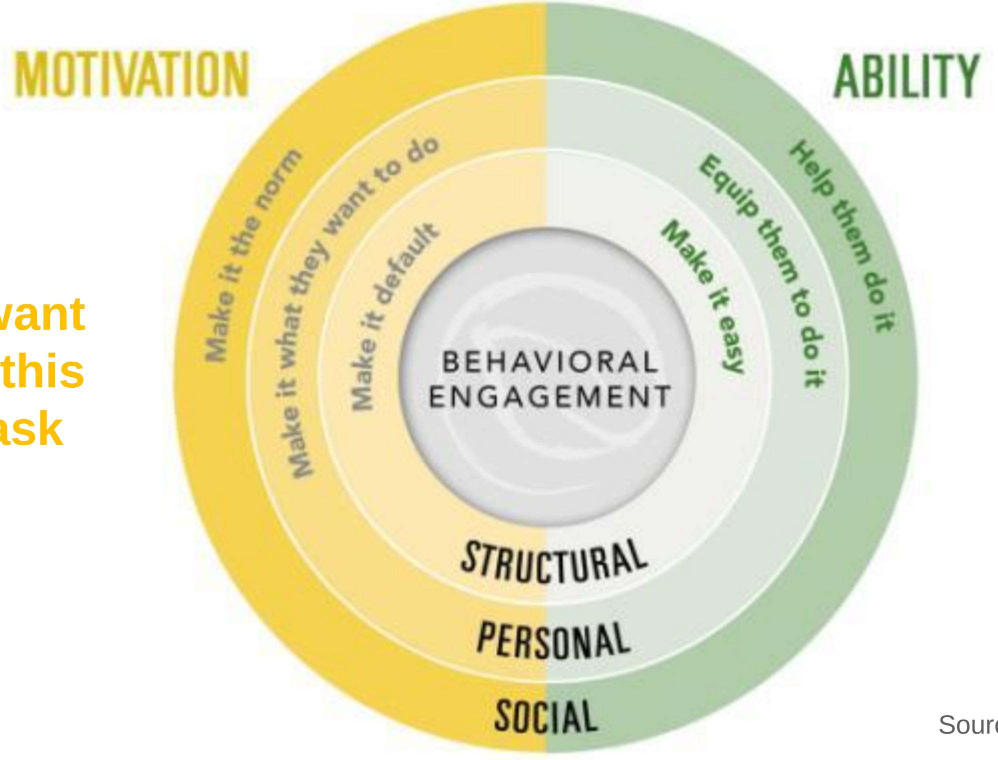
We have explored several successful behavioural models that focus on ability and motivation

Food Standards Agency



Our proposed model:
The Six Drivers of Behavioural Engagement

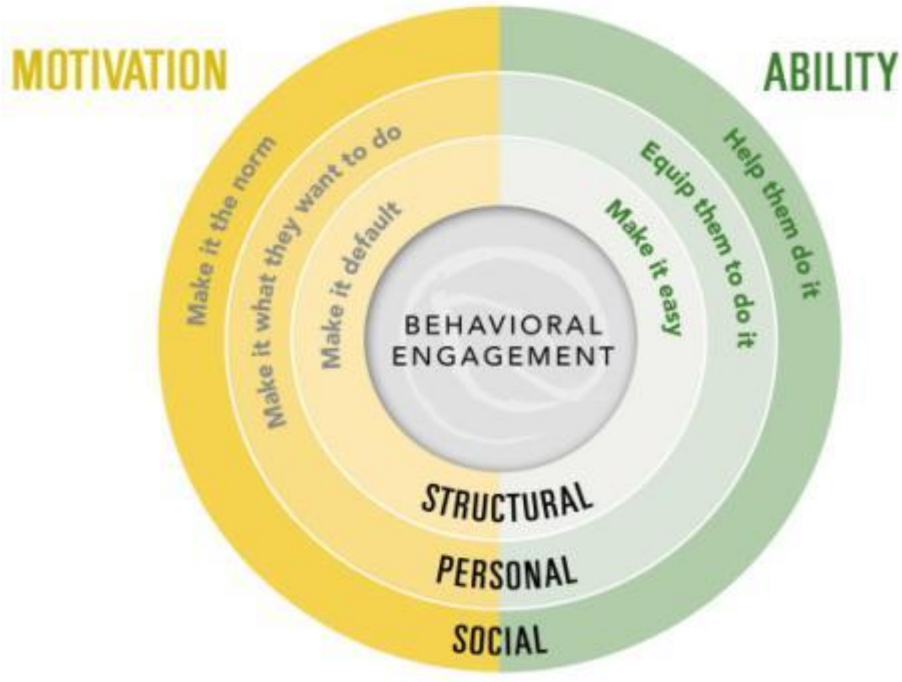
Make me want to take on this difficult task



Help me to do it

Source: David Maxfield

This model is inspired by “Fogg Behavioural Model” and “Influencer, the new science of creating change”



The model identifies six drivers of behavioural engagement.

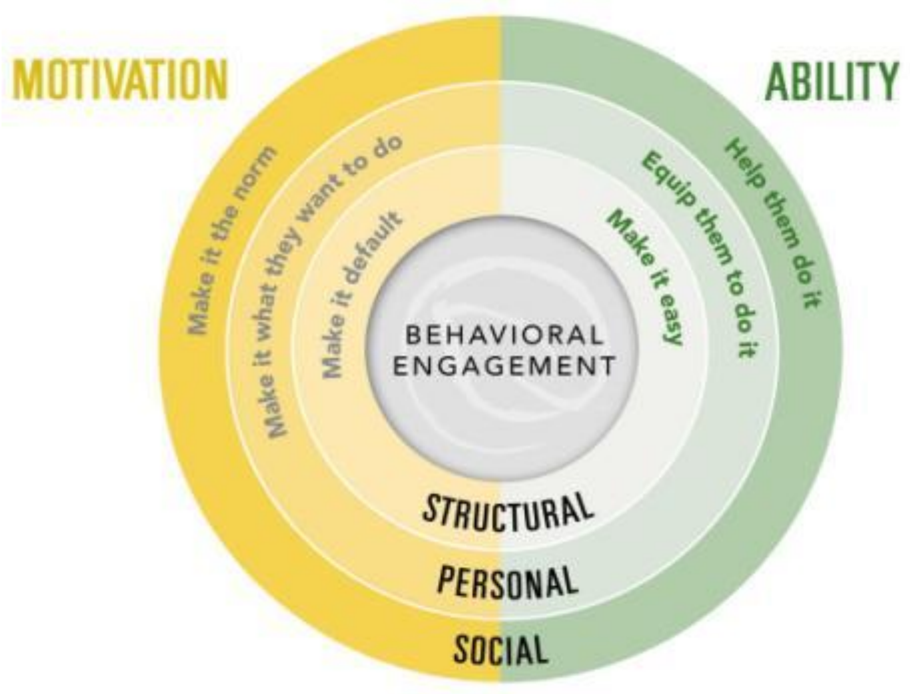
These drivers are separated into two parts; motivation and ability

Each part has three drivers: structural, personal and social

A successful behaviour change campaign has initiatives that work across all six levels

Bringing the model to life for FSA:
The Six Drivers of Behavioural Engagement

Food Standards Agency



MOTIVATION

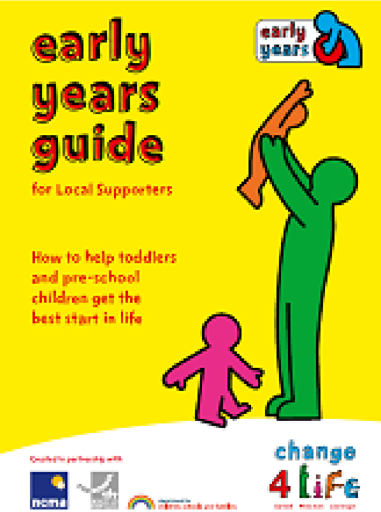
Make it the norm: Make it what I see and feel everyday. Use of influencers, local integration and activity (comparable brand example - Change 4 Life)

Make it what they want to do: Build natural, personal triggers (moments, contexts, partnerships, life-stages). Use storytelling as a way to showcase a new behaviour and its ease (comparable brand example – Anti Smoking)

Make it default: FSA becomes the 'go to' destination. Incentivise, showcase proof points.
Social and personal themes reinforce the value of the FSA as a destination brand/ companion (comparable brand example - my fitness pal)

Comparable brand examples

Make it the Norm



Change 4Life have a network of 58,000 local supporters to deliver healthy lifestyle messages in their local community

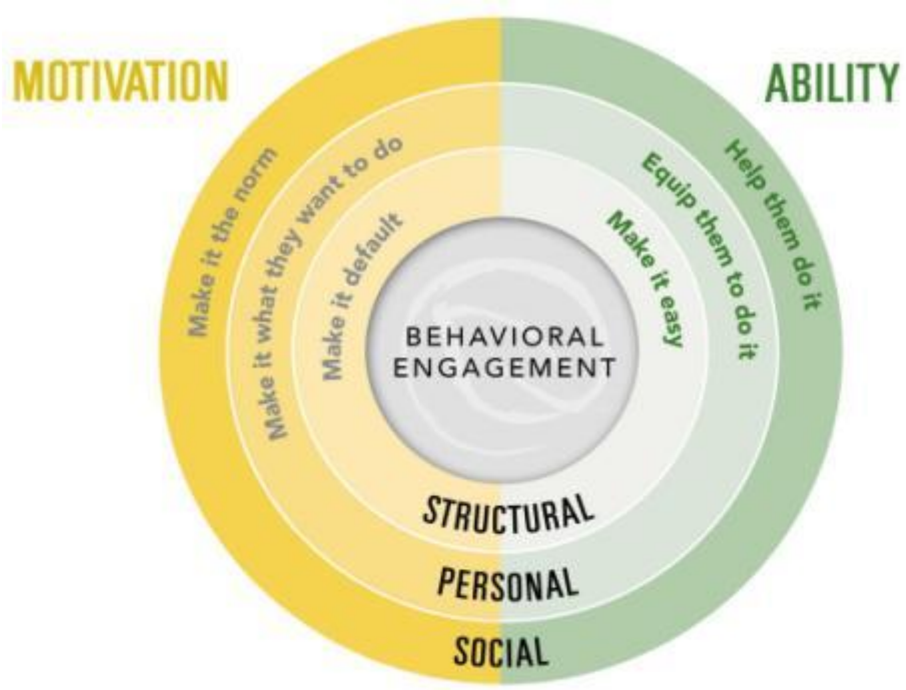
Make it what they want to do

Stoptober plays on natural triggers of ‘28 days’. If you can go 28 days without smoking you are five times more likely to quit for good. The campaign provides a 28 day support system including advice, daily tips, success stories from those who have successfully quit and support from charities and partners.

Make it default

Through helpful hints and tips as well as smart data visualisation my fitness pal is a go to for healthy living

Bringing the model to life for FSA:
The Six Drivers of Behavioural Engagement



ABILITY

Help them to do it: Sharing stories, peer influence, encourage an overheard contextual approach via reaching people in shared environments (comparable brand - weight watchers)

Equip them to do it: Show them how, guide people in creating structured behaviours, small simple steps (comparable brand - change 4 life)

Make it easy: Tools, helpful resources, simple consistent messaging (comparable brand - Jamie Oliver)

Comparable brand examples

Food Standards Agency

Help them to do it

Weight Watchers is an inherently social brand, with peer influence at its core.

Equip them to do it

Change 4Life has championed small changes for long-term change throughout its structured activity

Make it easy

Key to Jamie Oliver's success has been his simplicity and passion

Why we believe in this model for the FSA

Food Standards Agency

- Harnesses existing motivation
  - Audience triggers
- Guides people in creating structured behaviours
- Focuses on baby steps for long term change
  - Big leaps almost always fail
- Trust that tiny habits grow naturally
  - Success leads to success
- Facilitates behaviour change
  - Long term

Implications for brand FSA

- FSA becomes an empowering brand that champions the consumer
- It sets the agenda on food affordability and food sustainability
- It is an action focused, ‘doing’ brand, shifting consumers from passive to active
- Activity pushes the brand into a personal, local, helpful, trusted space
- Comparable brands with similar positioning include Change 4Life, Be Clear on Cancer, DWP and Weight Watchers

Next Steps

- MGOMD to supply full qualitative transcripts and project documentation
- FSA to feedback on next steps – appetite for further comms strategy development

Thank-you
Please contact Manning Gottlieb OMD for any further information

Food Standards Agency

Manning Gottlieb | OMD

Appendix – qualitative sample

Gender	London (N=4)	Bristol (N=9)	All (N=13)
Female	4	4	**8**
Male	-	5	**5**
Age			
18-24	1	3	**4**
25-34	2	6	**8**
35-44	1	-	**1**
Ethnicity			
White British	4	7	**11**
Other	-	2	**2**
Social grade			
B	2	2	**4**
C1	1	5	**6**
C2	1	2	**3**
Primary group			
Eco worrior	-	2	**2**
Localvore	3	4	**7**
Vegetarian	1	3	**4**

Gender	London (N=5)	Stoke (N=9)	All (N=14)
Female	1	5	6
Male	4	4	8
Age			
18-24	2	3	5
25-34	4	5	9
35-44	-	1	1
Ethnicity			
White British	3	8	11
Other	2	1	3
Social grade			
B	1	4	5
C1	3	5	8
C2	1	-	1
Group			
Student	2	3	5
Young professional	1	2	3
Growing families	2	4	6