




EATING WELL
AND
EATING OUT?

A decorative graphic consisting of five vertical white bars of varying heights, arranged in a slightly staggered pattern, set against a dark blue background.

Discover commercial opportunities
from research with 9,000 consumers
on eating healthily out of home

Introduction



Joanne Denney-Finch OBE
IGD Chief Executive

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At IGD, we closely monitor the global food and drink market. Two of the most powerful trends we follow are eating out and eating well (or in other words, healthily). In combination, these are creating a major shift in eating patterns.

That's why we set out to examine the role that health plays when people eat out in the UK. The market we explored spanned across food to go specialists, quick service restaurants, national restaurant chains and the food to go offer of supermarkets, discounters and convenience stores.

The results confirm the wealth of commercial opportunities on offer. Already, two-thirds of people eat out at least once a week and we expect the food to go market alone to grow by over 6% per year to reach £23.5bn in 2022.

This new research shows that even faster growth is possible. More people could be encouraged to eat out more frequently if their needs on health are met. There are various shopper missions and locations that constitute hotspots, where healthier options would be especially welcomed.

If the language of health can be made more positive, consistent and hit the right emotional notes, this will push the pace. No major company has forged a clear reputational lead in this area yet, so, the race is on.

I'm therefore delighted to share with you, a summary of our findings: Eating Well and Eating Out? Drawing from an online survey of over 9,000 people, plus observation and detailed discussion with a selected group, this is the most thorough consumer research we've ever undertaken.

I hope you find it interesting and valuable. Further details will be made available through igd.com/healthyeating.

IGD is a charity with a trading company providing commercial services including research and insight on the food and grocery industry. So please let us know if you'd like our help in converting the opportunities into reality for your company.

Executive summary

Four commercial opportunities

- 1 Encourage people to eat out more frequently
- 2 Reposition the language of health
- 3 Lead the agenda to build a winning reputation
- 4 Target the health hotspots

Four factors defining out of home missions



Occasion



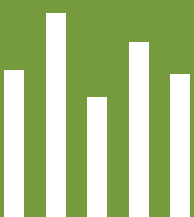
Companions



Mood

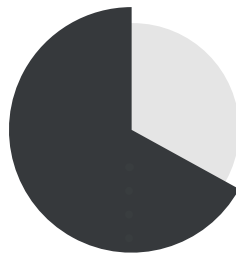


Speed



Four barriers to overcome

- 1 Healthy food is perceived as more expensive
- 2 Confusion about health messages
- 3 The effort needed to pursue healthy choices
- 4 Takeaway food culture



67%

of consumers eat out at least once a week



39%

cite health as one of their top three drivers when choosing lunch out of home



31%

would eat out more often if healthier options were more available



34%

avoid some outlets because they don't offer healthy enough food

Commercial opportunities

1. Raise the frequency of eating out

Eating out is strongly associated with treats and indulgence, therefore some people discipline themselves not to do it too often.

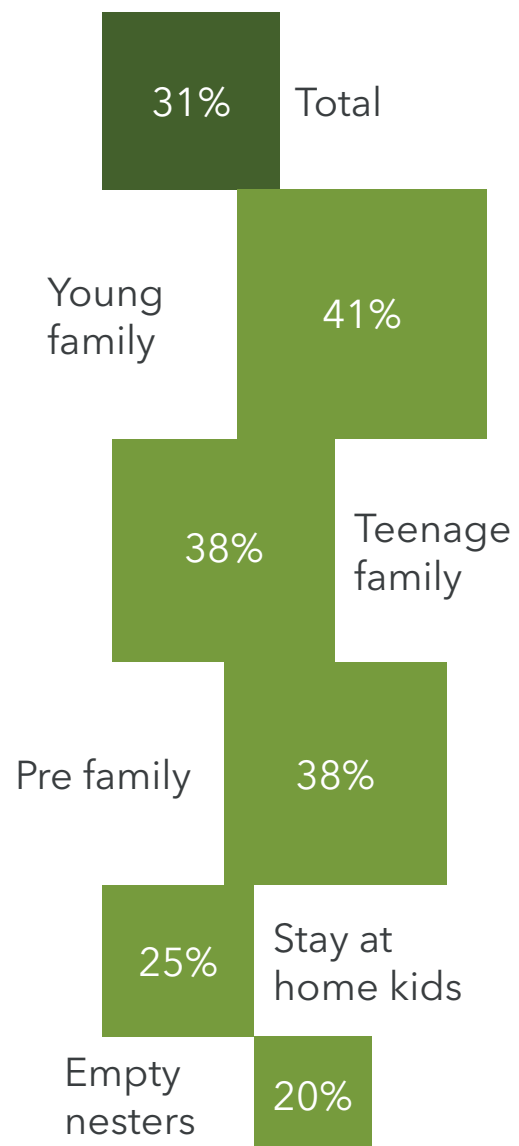
31% of people would eat out more if there were healthier options available.

This rises to 41% for parents with young children who often feel faced with a conflict between feeding them the food they love and keeping them on a healthy diet.



I would eat out more often if there were healthier options more easily available

Strongly/slightly agree






ShopperVista
 We have included data from our regular monthly online survey of 1,700 British shoppers, marked with an ^{*SV} in this report


There is also a growing opportunity to fulfil specific dietary requirements, such as gluten-free, dairy-free, vegan and vegetarian.

2. Reposition the language of health

“Healthy - well I can only think about salad, and to me that’s just rabbit food.”



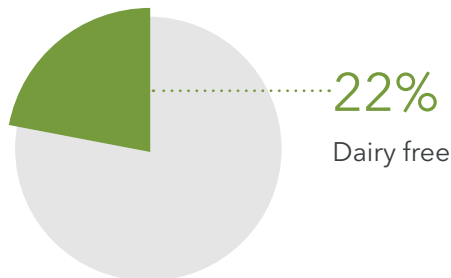
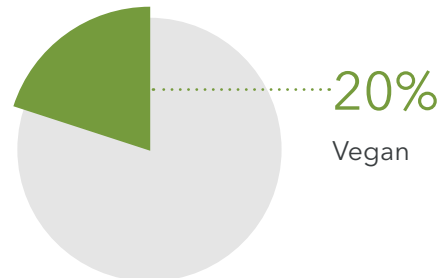
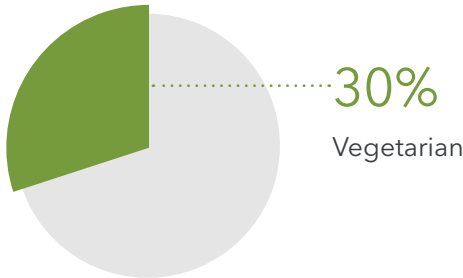
“Why would I go for the option with less of something when I could go for the option with all of everything!”



For many consumers, a negative connection has formed between healthy eating and taking pleasure. There is an opportunity to break this by demonstrating that healthy food can taste good and make you feel good too. This requires talking about health in a positive way. It is not about facts and figures.

Giving healthy ingredients ‘hero status’ on menus and packs can make them enticing and capture attention. This might involve emotive language and visuals to engage the senses, creating a sense of theatre around preparation and see-through packaging to showcase the contents. Linking healthy food with fictional characters can substantially boost demand among children.

% of food-to-go shoppers who would like a larger range of these types of products ^{*SV}





3. Lead the agenda

Our research showed that no large-scale company has achieved a clear lead in building a reputation on health.

This remains an open race although it does need to be tackled with care.

The opportunity is to build a reputation as the best place to go for healthier options without losing those people who would be turned off by overt healthy messages.


4. Target the health spots

There are plentiful opportunities to focus on the demographic groups, locations and occasions when people are more concerned with healthy eating.

For example, outlets regularly used by workers for lunch will have a particularly receptive audience for healthier options.

In locations that serve many time-pressured customers, the choices need to be particularly clear and the messages simple.

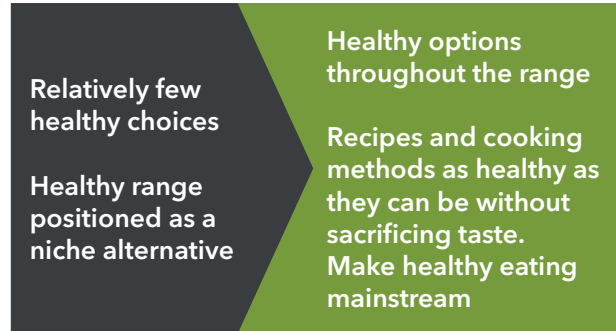
“Leave the house at 8am, I stop on the way to work to grab some breakfast. Normally stop at a convenience shop as can park right outside. Will grab a croissant or something similar to eat at my desk when I get to the office.”



As the charts show, some groups feel less well served than others, a sign of market gaps.

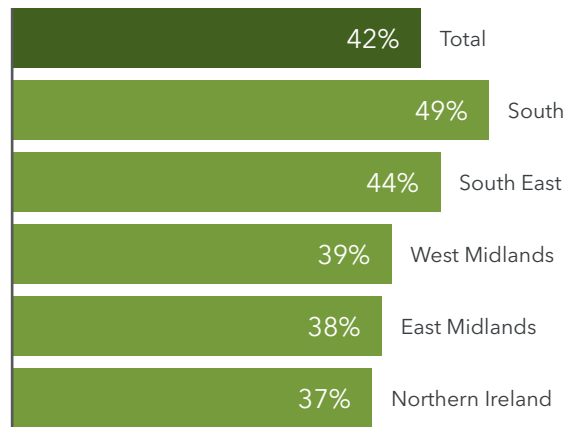
From

To



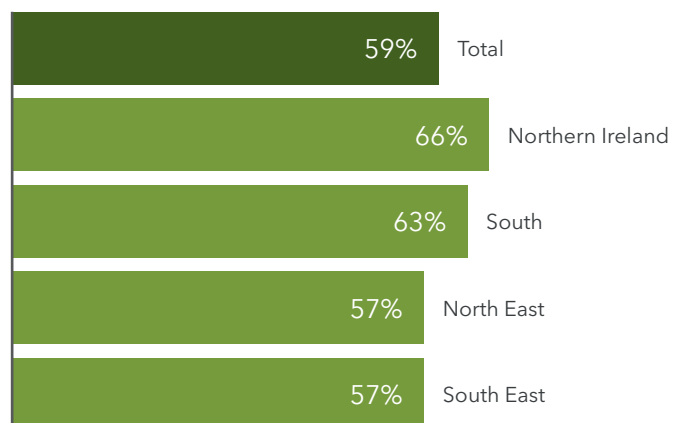
There are lots of places I can eat healthily in my local areas

Strongly/slightly agree



It's more expensive to eat healthily when out of home

Strongly/slightly agree





Perspectives on health

85%*^{SV} of shoppers claim to be trying to improve some part of their diet, whether or not they actually make changes. For this research, many people talked to us about eating more fruit and vegetables, watching calories and the fat and sugar content of products.

The commercial incentive to get the offer right on health can be summed up in two statistics:



34%

avoid some outlets because they don't offer healthy enough food



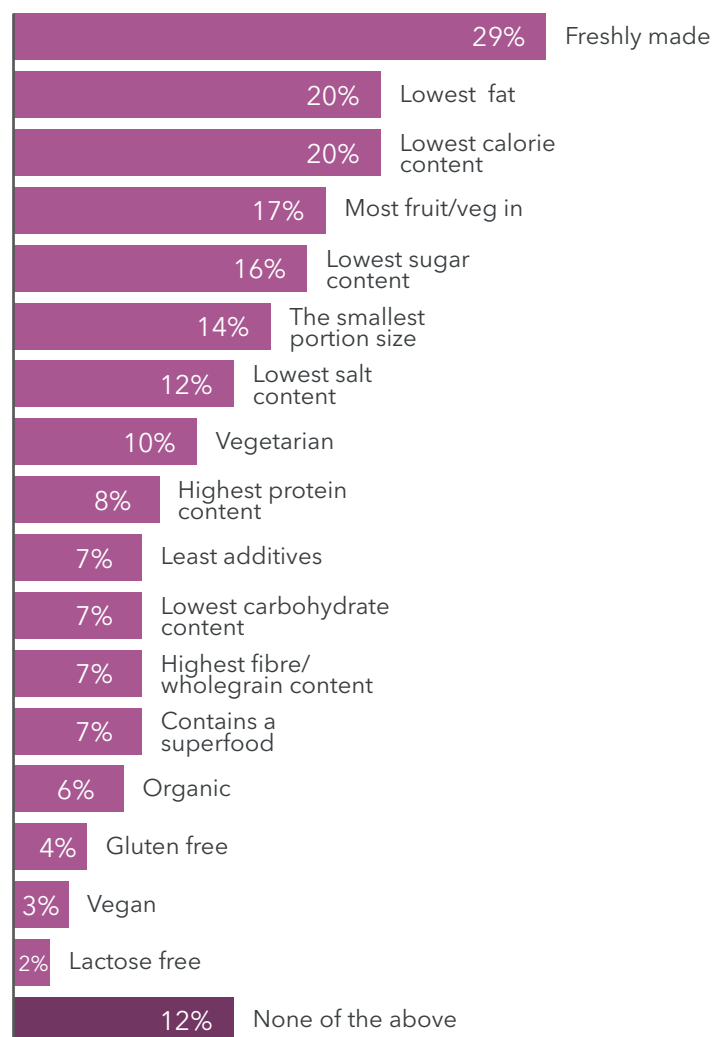
31%

would eat out more often if healthier options were more available

This is not however a simple matter. Healthier choices are welcomed by some people but others assume they would be left unsatisfied and still hungry. At the other end of the scale, many people view eating out as a treat and yet over-indulgence can leave a sense of guilt or regret.

In an out of home environment, freshly prepared food is seen as the best shortcut to health, however unreliable that may be from a nutritionist's viewpoint.

Question: If you wanted something a little healthier when you are out, what would you choose?





Solutions that work for a grocery shopping mission will not necessarily transfer across. Eating in and out occupy different mental spaces. When eating out for a treat, emotive factors are more significant. In this environment, people are driven more by their senses and tend to think less rationally.

Overt talk of healthy eating in this context can be off putting. For some consumers, healthy eating out of home is simply not relevant.

“When I’m out, I want to enjoy it. Talking about healthy eating - it’s just not important to me in this context.”



However, even though health is not overtly driving where many people visit, in our conversations, it was regularly referenced.

“I didn’t go past the sweets otherwise I would have been too tempted. I tried to be strong-willed today.”



“I decided if I go for Chinese I can limit the order by just getting a small starter and main, whereas with Indian I would have to go for the full works. As I had work to do this evening, I wanted something light and not too heavy.”



Many people talked about balance within meals, across the day and across the week.

Balance is something people struggle with and sometimes use to justify unhealthy choices. They usually take an individualistic rather than a scientific view of balance.

Nonetheless, if enough choice is provided, people can apply the concept of balance in their own way to make some dietary improvements.

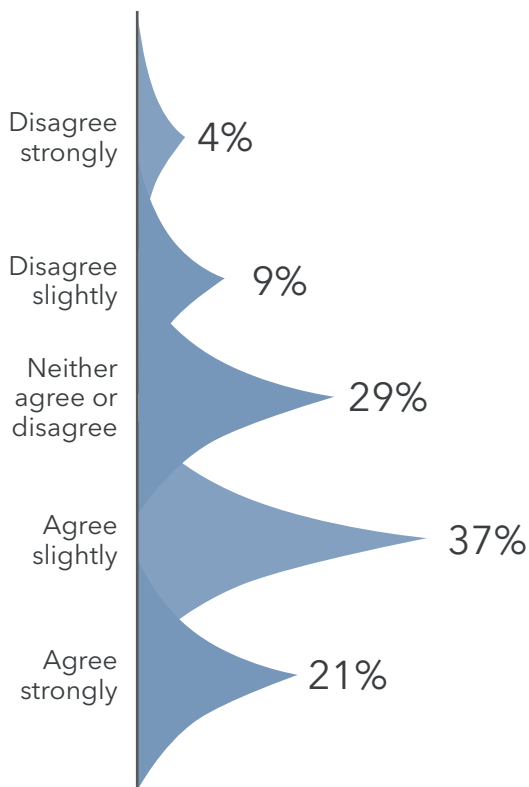
Removing the barriers to health

Health does influence people when they eat out but four main barriers are confining this:

1) Value perceptions

There is a deep-seated perception that eating healthily is more expensive. The need for value is particularly relevant for families and for those eating on the go at lunch time.

It's more expensive to eat healthily when out of home



2) Confusion about messaging

If health information is not presented in a consistent way, it can confuse and lead to wrong choices. Consumers often take short cuts but these can be unreliable, for example assuming an item with fruit on the label will probably be healthier.

"I thought they would be good for you as they have real fruit in them, but apparently not... so I don't even know now!"



"I thought the sandwich I bought from a local deli was a good one - as it's fresh, being made in front of me. But I asked them what was in the ingredients... Turns out it's not so healthy."



"Picked these thinking they were a healthy option without looking at nutrition - quite shocked at calorie and fat content - may as well have had a bag of crisps."



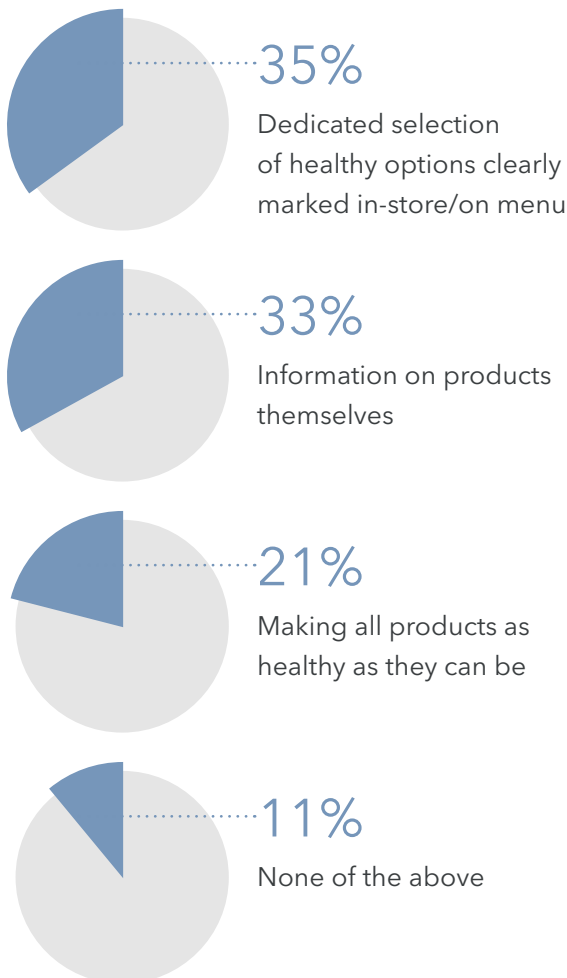


3) The effort to pursue health

Especially when grabbing food-to-go, people often revert to the quickest and simplest option. If finding a healthy option requires special effort, they are less likely to do so.

When offered a range of options to make finding healthy food easier, there was a variety of responses with no clear winner.

Overall when eating out, which of the following would be the most useful in helping you to make healthy choices?

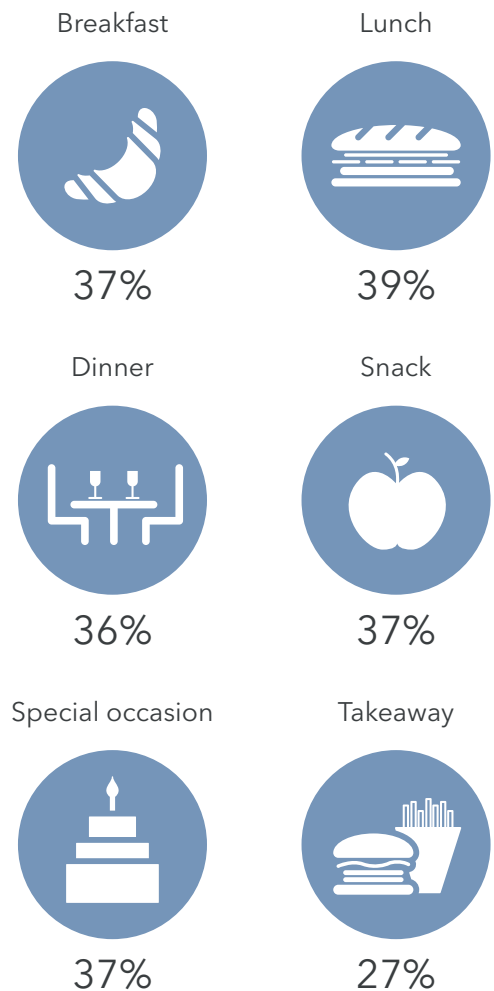


4) Takeaway food culture

Takeaway meals are the mission where health is least considered, largely because classic takeaway meals are not usually associated with health.

However, new home delivery services that offer a wider range of restaurant-cooked meals could change people's perception about takeaway meals over time.

% of people who put health as one of their top three drivers by occasion



Mission focus

The role health plays in out of home eating varies according to four key factors that define the mission.



Occasion

Both day of the week and time of day. Everyday occurrences are usually more controlled with consumers picking tried and tested favourites, whereas special occasions are more about treats.



Companions

On their own, people tend to stick to their usual choices; with friends or children they may try new things and visit new places.



Mood

There is a distinction between eating/drinking for functional reasons versus meeting an emotional need. Eating out can provide an energy boost, lift a mood or be a reward.



Speed and convenience

In time-pressed circumstances people need easy choices whereas on more relaxed occasions they will take their time to decide.

Rather than trying to change the way people think, companies are more likely to win by better associating health with the main factors driving consumer choices for each mission.

Top 3 drivers for each occasion

Breakfast



Taste and flavours I like

Hot food and drink options

Food which feels fresh

Lunch



Good quality

Food which feels fresh

Good value for money

Dinner



Good quality

Food which feels fresh

Friendly & helpful staff

Snack



Taste and flavours I like

Easy to find what I want

Good quality

Special occasion



Good quality

Taste and flavours I like

Food which feels fresh

Takeaway



Taste and flavours I like

Food that will keep me feeling full

Good quality



Foundations for our research

Our objectives

To understand the extent to which consumers and shoppers consider health when buying and eating food out of home and to help companies identify commercial opportunities to provide a better health-related offer.

To explore what the health choices are out of home (to understand the relevance of various factors such as the interest in free from, rise of flexitarianism, use of nutritional information).

To understand how consumers and shoppers balance the functionality of eating and drinking out of home with the treat nature often associated with these missions and occasions.

To assess current levels of satisfaction with the choice, composition, portion sizes and information provided from a health perspective, together with consumer suggestions for how this might be improved.

Our research proposition

Mobile ethnography

24 consumers recorded all their out of home eating and drinking experiences over three weeks

Accompanied dines

Moderators accompanied ten different respondents, and their families, on an array of out of home eating experiences

Online survey

A nationally representative sample of over 9,000 UK consumers completed an online survey

Defining the market



The food-to-go offer of supermarkets, convenience stores and high street retailers.



Food-to-go specialists and quick service restaurants



National restaurant chains

The research took place in September and October 2017



Next steps

IGD is a training and research charity. We also have a trading company which provides a range of commercial services including research and insight on the food and grocery industry.

The net profits from these commercial services help fund the charity.

Digested our report? Want to know what to do next? Here are 4 ways to take action now.

Get a takeaway

Contact us to request the full Eating Well Eating Out presentation slide deck including our expanded findings.

We deliver

Why not commission us to present Eating Well Eating Out at your work place? We can tailor the briefing to correspond to your needs.

Meal deal

For regular insights from IGD, sign up to our free, weekly food-to-go newsletter.

www.igd.com/newsletters

Gourmet occasion?

Interested in commissioning specific research for your business? Why not speak to us.

Email : Rhian.Thomas@igd.com

Want to know more?

Our Healthy Eating programme helps the food and grocery industry promote healthier diets in the UK through research, insight and recommendations for companies. We do this by bringing people together, conducting research, sharing free information and spreading best practice to help improve the health of the nation. Nearly 10,000 people were involved in 2017.

We are helping shoppers to understand nutrition labels through a series of simple messages that companies and others are helping to spread. We have also developed new best practice guidelines to encourage more consistency in front of pack labels.

We help and encourage companies to reformulate their products to be healthier by sharing examples and best practice.

Working with the Behaviour and Health Unit of the University of Cambridge, we have been conducting a series of experiments to find the most effective ways of encouraging healthy eating in the workplace.

We are introducing new projects to consider how to increase fibre in diets and to explore how to help companies set their portion sizes.

To read our guides and case studies, and to sign up for our newsletter, please visit

www.igd.com/healthyeating or contact **healthyeating@igd.com**



IGD is a training and research charity for the food and grocery industry that undertakes research for the benefit of the public

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