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Driving Change: Behaviour change trial findings

The evidence on nudging
consumers to healthier diets

Health from IGD



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Most people aren't eating a healthy diet

With less than 1% of the population meeting the government's dietary recommendations, action is needed to shift diets.¹

66% of UK shoppers are open to making changes but with 58% of shoppers thinking their diet is healthy enough, innovative, evidence-based tactics are needed to make changes.²

Behaviour change isn't easy. There is a known difference between what consumers say will change their behaviour and how they act, so building evidence in real life settings is crucial.³








Delivering meaningful change will require action from businesses, government and consumers, aligned with a clear evidence base.⁴

Supermarkets exert considerable influence on consumers choices so present an ideal environment in which to test interventions.⁵

Since 2021, IGD has been working in collaboration with The University of Leeds to find out what works and what doesn't within real life settings to shift consumers towards healthier and more sustainable diets. See all our [results](#) so far.

Unhealthy diets account for 13% of all deaths in the UK⁵

84% of shoppers are trying to improve their diet in some way⁶

-  Fruit and Vegetables
-  Carbohydrates
-  Proteins
-  Dairy & alternatives
-  Oil & spreads
-  Discretionary Foods
-  Composite foods



We have investigated how results compare against the government dietary recommendations.⁷ Our version of the Eatwell guide includes extra categories for composite and discretionary foods.

Taking action together

Collaboration between the food industry and academia is not without challenges. In partnership, IGD and University of Leeds have developed considerable expertise in this space, having delivered results from five trials with four retailers so far.⁸

Reflecting its groundbreaking work, the Nutrition and Lifestyle Analytics Team at The University of Leeds [Consumer Data Research Centre](#) (CDRC) won the Economic and Social Research Council's [Outstanding Business and Enterprise Impact Award 2023](#).

This award recognises the impact of the programme in helping food retailers make changes to enable healthier and more sustainable diets for customers.

More widely other organisations such as, The [Consumer Goods Forum](#), The [Food Foundation](#), [Food Insecurity for people living with Obesity \(FIO Food\)](#) and [Salient](#) are working in collaboration with others to test what works to shift consumers to healthier and more sustainable diets.

In this report we have brought together the results of our programme with relevant examples of behaviour change trials to show what works and what doesn't.



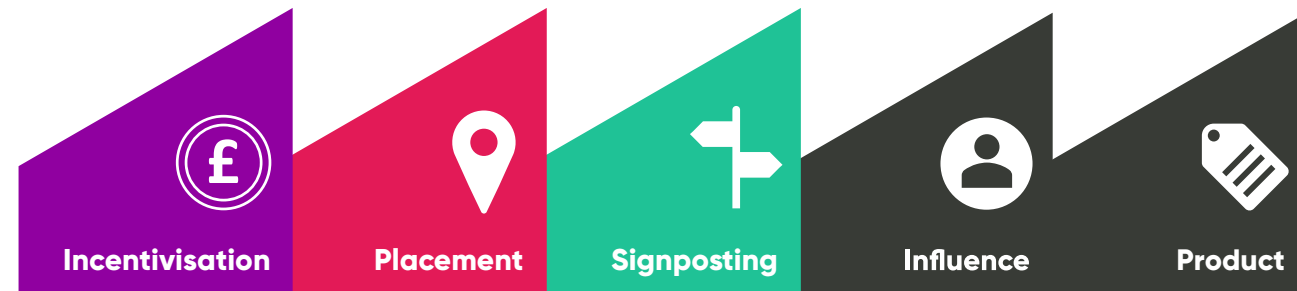
Delivering real life trials

Working collaboratively across industry, with academics and other sectors is the key to making change, but it's not simple.

IGD & CDRC's simplified process for delivering real life trials with UK retailers:



Behavioural Change Levers



IGD's previous research ([Appetite for Change](#)) identified five behaviour change levers that could be used to nudge consumers towards healthier and more sustainable diets: signposting, placement, product, influence and incentivisation.

So far we have tested incentivisation, placement and signposting. Evidence for each of these three levers tested will be explored in this report. For more detail on each lever, see our publications:

£ Incentivisation

- ▶ [Reducing the price of fruit and vegetables in Sainsbury's](#)
- ▶ [Supporting low-income families with Healthy Start voucher top ups in Sainsbury's](#)

📍 Placement

- ▶ [Placing plant-based alternatives into ASDA meat aisle](#)
- ▶ [Moving salads next to Italian ready meals in M&S](#)

➔ Signposting

- ▶ [Signposting easy affordable healthier swaps in Lidl](#)



£ Incentivisation shifts consumers to healthier products

In store, price-based promotions increase sales of fruits and vegetables in the short-term.



With 37% of consumers identifying cost as the greatest barrier to eating healthier it's no surprise that incentivisation is a powerful lever of change.²

For example, when a variety of promoted fruit and vegetables were priced at 60p Sainsbury's saw:

- 78% increase in sales of portions of promoted fruit and vegetables.
- 1.5 million baskets containing a promoted product in the intervention period.
- Higher value items performing best.

Three weeks into the four-week intervention period, sales of the promoted fruit and vegetables declined, suggesting the effectiveness of the intervention decreased with time.



To find out more see the [full report](#).

A broader perspective:

Investigations of wider research also suggests that price can be the most powerful mechanism.⁹

But there is a similar time limit on how long interventions are effective for.

- Tesco saw a 13% increase in net sales of selected fruit and vegetables when they were reduced in price across two-week periods in 2019.¹⁰

£ Incentivisation works when targeted

Targeting specific demographic groups with price incentives and reward schemes has also proved effective



Healthy start vouchers provide financial support for low-income families to buy essential foods.

When a £2 top-up of the government's [healthy start vouchers](#) (to be used on fruit, vegetables and pulses) was trialled in Sainsbury's it led to:

- 13 more portions of fruit and veg being bought per transaction.
- A shift in purchasing habits towards the UK Government's Dietary Recommendations.
- Sainsbury's extending the top-ups for a further six months in 2022/23.



To find out more see the [full report](#).

A broader perspective:

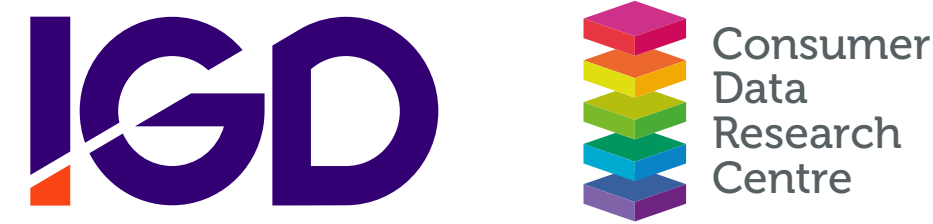
Healthy start voucher use increased by 10% when Lidl topped up the vouchers alongside a campaign.¹¹

Targeted reward-based schemes have also worked well to incentivise purchases of healthier products:

- Sainsbury's had a 387% rise in sales of fruit when [healthier products were incentivised with children's](#) Disney themed collectable cards.¹⁰
- When a soft toy reward scheme was used to encourage fruit and vegetable purchases in Croatia, the retailer reported increased purchases by engaged shoppers.¹²

📍 Placement can impact shopper behaviour

Changing the placement of products within retailers has impacted purchasing but not always as predicted.



When ASDA moved plant-based foods away from a clearly marked dedicated bay into the meat aisle directly alongside animal products:

- ▀ Sales of these products declined by 30%.



To find out more see the [full report](#).

When salads were placed next to Italian ready meals in M&S there was:

- ▀ No impact on sales of salads.
- ▀ But the analysis revealed that M&S shoppers were already buying more fruit and vegetables than average shoppers.



To find out more see the [full report](#).

A broader perspective:

- ▀ Multiple trials have seen a fall in spend on unhealthy items when they are removed from checkouts.^{13,14}
- ▀ When Tesco removed confectionary from off fixture displays and introduced a "Fresh 3" fixture instead, there was an increase in sales of healthier products in the first thirty weeks.¹⁰
- ▀ But when Sainsbury's changed the placement of healthier and less healthy cereals it had little impact on shopper behaviour.¹⁰

➔ Signposting can increase sales of healthier products

Signposting works when the messaging and products resonate with consumers.



Signposting healthier options can enable customers to make better choices more easily.

IGD's trial with Lidl saw messages about calories, fat, saturated fat, sugar and fibre displayed next to products.

- Shoppers were more open to switching when messages focused on calories or sugar, and on products such as coleslaw or cereals.
- Meal centres such as chicken or tuna, that were accompanied by messaging on fat saw no impact on the sales.



To find out more see the [full report](#).

A broader perspective:

Results elsewhere have also seen effectiveness vary across products and different messages.

- In an online signposting trial, Sainsbury's only saw increases in sales for some healthier products that they advertised with banners, recipe lists and reordering.¹⁵
- Tesco has reported that since launching its Better Basket campaign (consisting of clearly signposted ranges of products that were better choices) they have seen a 12% increase in volume year on year for those products.¹⁶

Key learnings

These studies demonstrate the huge potential for change in retail environments to encourage positive shifts in consumer behaviour. More research is vital to determine exactly how best to use each lever.



Incentivisation

Positive short-term results have been seen for price-based interventions, particularly when targeted.

However reducing prices longer-term isn't always effective or financially sustainable for businesses.

Further research could test the impact of short promotional cycles or mixing up incentives.

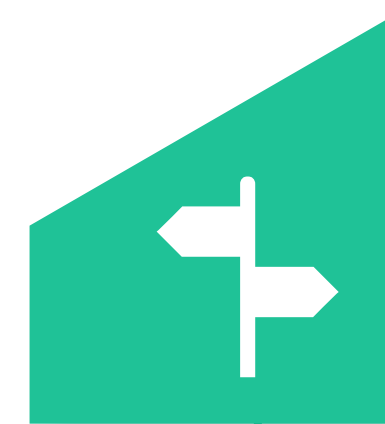


Placement

Placement alone can influence purchasing decisions but not always as predicted.

Changing placement of unhealthy products can decrease sales but more research is needed.

The recent HFSS legislation could be considered the largest placement intervention to date. We are currently investigating its [impact](#).



Signposting

By helping make healthier choices easier, signposting can be effective. It works best when consumers are open to the health messages and where product swaps are easy.

Future research could consider how different signposting messages could impact different consumer groups.

Recommendations

Keep testing interventions

in real life settings and ensure they are robustly evaluated to build evidence.



Share expertise and **collaborate** across industry, academia and other groups to enable interventions to be much more powerful.

Price is key to helping consumers make healthier choices. Consider how you can best use pricing promotions to help incentivise sustained healthier choices.



Target interventions

at specific demographic groups. We have seen interventions work well when targeting low-income families with children.

Next steps

We will continue to collaborate to build evidence and share what works to shift consumers to healthier more sustainable diets. Visit our [website](#) to find out more.

1

We have more retailer behaviour change trial results to come in 2024. To find out more about our upcoming work and keep up to date with our real-life trials sign up to our [newsletter](#).

2

As part of the Diet and Health Inequalities (DIO) food project, The University of Leeds, multiple UK retailers and IGD will work in partnership to analyse the impact of HFSS placement restrictions. Find out more [here](#).

3

Get in touch to learn more or work with us: healthyeating@igd.com

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