The wellness trend in the food sector: what do consumers want?

“Marketing wellness in the food sector”
MAPP Conference, Aarhus, December 1 2016
Dr Sophie Hieke
European Food Information Council
Price and best before/use by date are the most important label aspects for consumers.

“When buying food and drink products, how often do you look for the following information on the packaging?”

- Price
- Best before/use by date
- Quantity/Size of product
- Brand
- Ingredients list
- Nutrition Information
- Cooking instructions
- Country of origin
- Nutritional benefits
- Portion information
- Organic status
- Health benefits
- Ethical labels
- Environmental labels
- Health logo/symbol
- Allergy information

EUFIC study (2016), n = 2192 in UK, France, Poland and Sweden
That food contains natural ingredients is most important to consumers

“It is important to me that the food I eat on a typical day…”

Percentage of respondents answering that they agree (scale points 3 and 4 on a scale of 1=not at all important to 4=very important)

EUFIC study (2016), n = 2192 in UK, France, Poland and Sweden
What drives food choice?
We’ve asked consumers...

“Drivers of Choice” project
Laddering interviews (n=50) in five countries (UK, FR, IT, PL and TK)
Results UK: Ready Meals

dominant sequence: quick to prepare → saves time → provides comfort and relaxation → good for health → longevity

Happiness
 nr:9
 sub:38%

Satisfaction
 nr:12
 sub:50%

Saves Money
 nr:12
 sub:50%

Value for money (C)
 nr:4
 sub:17%

Inexpensive
 nr:4
 sub:17%

Good price
 nr:5
 sub:21%

Convenient
 nr:9
 sub:38%

Quick to eat/prepare
 nr:14
 sub:58%

Longevity
 nr:4 sub:17%

Good for Health
 nr:11
 sub:46%

Improves productivity
 nr:4 sub:17%

Provides comfort and relaxation
 nr:13
 sub:54%

Saves Time
 nr:18
 sub:75%

Reduces Food Waste
 nr:5
 sub:21%

Long shelf life / storage
 nr:4
 sub:17%

Good Taste
 nr:17
 sub:71%

Satisfaction
 nr:12
 sub:50%

Happiness
 nr:9
 sub:38%

Leads to Repurchase
 nr:3 sub:13%

Enjoyable Consumption
 nr:13 sub:54%

Longevity
 nr:4 sub:17%

Good for Health
 nr:11 sub:46%

Improves productivity
 nr:4 sub:17%

Provides comfort and relaxation
 nr:13 sub:54%

Saves Time
 nr:18 sub:75%

Reduces Food Waste
 nr:5 sub:21%

Long shelf life / storage
 nr:4 sub:17%

Good Taste
 nr:17 sub:71%

Satisfaction
 nr:12 sub:50%

Happiness
 nr:9 sub:38%

Leads to Repurchase
 nr:3 sub:13%

Enjoyable Consumption
 nr:13 sub:54%

Longevity
 nr:4 sub:17%

Good for Health
 nr:11 sub:46%

Improves productivity
 nr:4 sub:17%

Provides comfort and relaxation
 nr:13 sub:54%

Saves Time
 nr:18 sub:75%

Reduces Food Waste
 nr:5 sub:21%

Long shelf life / storage
 nr:4 sub:17%

Good Taste
 nr:17 sub:71%

Satisfaction
 nr:12 sub:50%
What does all of this mean?

For ready meals, we see three ‘dominant perceptual orientations’ (sequences):

- **‘indulgence’**: good taste – enjoyable consumption – satisfaction – happiness
- **‘convenience’**: quick to prepare – saves time – provides comfort and relaxation – good for health – longevity
  - first part: not surprising
  - second part: quite interesting
    - shows the importance of the ‘knowledge about self’ component
    - comfort and relaxation is good for you and your health
    - indirect link from ready meals to health, because of the convenience
- **‘monetary’**: good price – save money – happiness
Results UK: Breakfast cereals

Interaction effect: good taste leads to good for health, via 'ensures consumption'

Cut-Off=3

- Improves productivity nr:5 sub:19%
- Provides Energy nr:7 sub:27%
- Good Quality nr:5 sub:19%
- Trusted Brand nr:6 sub:23%
- Good for Health nr:17 sub:65%
- Good Quality life nr:3 sub:12%
- Ensures Consumption nr:10 sub:38%
- Good Taste nr:12 sub:46%
- Convenient nr:3 sub:12%
- Low/ No Sugar nr:5 sub:19%
- Quick to eat/ prepare nr:5 sub:19%
- Saves Time nr:6 sub:23%
- Saves Money nr:9 sub:35%
- Value for money nr:5 sub:19%
- Good Price nr:4 sub:15%
- Longevity nr:4 sub:15%
- Fulfilment nr:7 sub:27%
- Satisfaction nr:9 sub:35%
- Sense of responsibility nr:7 sub:27%
- Weight Control nr:5 sub:19%
- Good for Health nr:17 sub:65%
- Enjoyable Consumption nr:9 sub:35%
- Enjoyable Consumption nr:9 sub:35%
- Ensures Consumption nr:10 sub:38%
- Longevity nr:4 sub:15%
- Provides Energy nr:7 sub:27%
- Good Quality nr:5 sub:19%
- Trusted Brand nr:6 sub:23%
- Good for Health nr:17 sub:65%
- Good Quality life nr:3 sub:12%
- Ensures Consumption nr:10 sub:38%
- Good Taste nr:12 sub:46%
- Convenient nr:3 sub:12%
- Low/ No Sugar nr:5 sub:19%
- Quick to eat/ prepare nr:5 sub:19%
- Saves Time nr:6 sub:23%
- Saves Money nr:9 sub:35%
- Value for money nr:5 sub:19%
- Good Price nr:4 sub:15%
What does all of this mean?

For breakfast cereals, we see ‘3 dominant perceptual orientations’ (sequences).

- ‘health’: healthy ingredients – good for health – fulfilment
- ‘monetary’: good price – value for money – saves money
- ‘indulgence’: good taste – enjoyable consumption – satisfaction

There is also an interaction effect from good taste to good for health, via ‘ensures consumption’
Results ITALY: Breakfast cereals
Breakfast cereals are good for health because of their ingredients (healthy and balanced diet); brand is important.
Results FRANCE: Yoghurt
Ingredients that are good for health and an enjoyable consumption that relaxes both lead to well-being

- Healthy Life nr: 10 sub: 34%
- Longevity nr: 8 sub: 28%
- Good for Health nr: 20 sub: 69%
- Enjoyable Consumption nr: 23 sub: 79%
- Well being nr: 17 sub: 59%
- Provides comfort and relaxation nr: 6 sub: 21%
- Brings Positive Attitude nr: 6 sub: 21%
- Hedonism, Joy nr: 13 sub: 45%

- Healthy and Balanced Diet nr: 3 sub: 10%
- Calcium nr: 3 sub: 10%
- Milk nr: 7 sub: 24%
- Offers Variety nr: 6 sub: 21%
- Goes well with other products nr: 5 sub: 17%
- Fruits nr: 7 sub: 24%
- Good Taste nr: 9 sub: 31%
- Creamy texture nr: 4 sub: 14%

Calcium nr: 3 sub: 10%

Cut-Off=3
Health and enjoyment emerge as the two dominant themes in food choice

😄 ‘indulgence’: enjoyable consumption is often associated with comfort and relaxation as well as a positive attitude
  ➤ wellness theme

❤️ ‘good for health’: important are people’s perceptions of what is good for their health, it can manifest itself in surprising links or via the wellness theme (comfort, relaxation and a positive attitude help people be healthy)
Country differences

For UK consumers, health aspects of food products often dominate their motives of choice (foods-as-nutrients approach).

French consumers focus much more on the enjoyment aspect of food (holistic approach) and are looking for well-being.

Italian consumers display both tendencies and often link them. Brands are important in their food choice.
Clean labels = Health?
What consumers associate with ‘free-from’ labels differs widely by country

<table>
<thead>
<tr>
<th></th>
<th>UK</th>
<th>France</th>
<th>Poland</th>
<th>Sweden</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Gluten</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Intolerance, illness, digestion, allergy</td>
<td>12%</td>
<td>28%</td>
<td>13%</td>
<td>25%</td>
</tr>
<tr>
<td>Products with gluten</td>
<td>43%</td>
<td>29%</td>
<td>38%</td>
<td>43%</td>
</tr>
<tr>
<td><strong>Lactose</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Irritation, digestion, intolerance</td>
<td>9%</td>
<td>12%</td>
<td>8%</td>
<td>23%</td>
</tr>
<tr>
<td>Milk, milk-products</td>
<td>47%</td>
<td>52%</td>
<td>52%</td>
<td>46%</td>
</tr>
<tr>
<td><strong>Palm oil</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Destruction of environment, suffering monkeys</td>
<td>14%</td>
<td>21%</td>
<td>1%</td>
<td>21%</td>
</tr>
<tr>
<td>Unhealthy</td>
<td>3%</td>
<td>8%</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td><strong>GMOs</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Artificial, unnatural, Frankenstein-food</td>
<td>19%</td>
<td>16%</td>
<td>29%</td>
<td>12%</td>
</tr>
<tr>
<td>Negative evaluation (e.g., bad, wrong, dangerous, avoid, unhealthy)</td>
<td>9%</td>
<td>24%</td>
<td>15%</td>
<td>12%</td>
</tr>
</tbody>
</table>

EUFIC study (2016), n = 2192 in UK, France, Poland and Sweden
‘Free-from’ labels are linked to perceived product healthiness

- When comparing the same products with and without a ‘free-from’ label, consumers rate the labelled product as healthier
- Across all countries, ‘free-from’ labels are seen as trustworthy
- Consumers do, however, not currently look for ‘free-from’ labels, with the exception of French consumers who look for palm-oil free and GMO free labels to a certain extent
- Gluten-free and lactose-free labels are mainly linked to nutritional benefits, while GMO-free labels are mainly linked to safety concerns
- Palm-oil free labels are perceived differently across countries: nutritional benefits are most important in the UK and Poland, environmental reasons most important in Sweden and safety concerns most important in France

EUFIC study (2016), n = 2192 in UK, France, Poland and Sweden
Consumers are somewhat unlikely to find ‘free-from’ labels useful in their purchase decision, but country differences exist.

“Do you find the information in this label useful in helping you make a purchase decision?”

EUFIC study (2016), n = 2192 in UK, France, Poland and Sweden
Except for palm oil and GMOs in France, consumers are not willing to pay more for ‘free-from’ labelled products.

“If the price would be higher than on other similar products without the label, how likely would you be to purchase the labelled product?”

EUFIC study (2016), n = 2192 in UK, France, Poland and Sweden
What do consumers see on the market?
## Prevalence of claims on-pack

Nutrition claims most common, followed by health claims

<table>
<thead>
<tr>
<th>Claim type</th>
<th>No. of claims</th>
<th>... of which are symbolic</th>
<th>No. of foods with a claim</th>
<th>% of foods with claim (95% CIs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nutrition claim</td>
<td>865</td>
<td>1</td>
<td>423</td>
<td>20.8% (19.0%–22.5%)</td>
</tr>
<tr>
<td>Nutrient content claim</td>
<td>797</td>
<td>1</td>
<td>399</td>
<td>19.6% (17.8%–21.3%)</td>
</tr>
<tr>
<td>Nutrient comparative claims</td>
<td>68</td>
<td>0</td>
<td>49</td>
<td>2.4% (1.7%–3.1%)</td>
</tr>
<tr>
<td>Health-related ingredient claim</td>
<td>105</td>
<td>6</td>
<td>72</td>
<td>3.5% (2.7%–4.3%)</td>
</tr>
<tr>
<td>Health claim</td>
<td>392</td>
<td>74</td>
<td>222</td>
<td>10.9% (9.6%–12.3%)</td>
</tr>
<tr>
<td>General health claim</td>
<td>153</td>
<td>64</td>
<td>137</td>
<td>6.7% (5.6%–7.8%)</td>
</tr>
<tr>
<td>Nutrient and other function claim</td>
<td>185</td>
<td>9</td>
<td>106</td>
<td>5.2% (4.2%–6.2%)</td>
</tr>
<tr>
<td>Reduction of disease risk claim</td>
<td>21</td>
<td>1</td>
<td>12</td>
<td>0.6% (0.2%–0.09%)</td>
</tr>
<tr>
<td>Children’s development &amp; health claim</td>
<td>33</td>
<td>0</td>
<td>15</td>
<td>0.7% (0.4%–1.1%)</td>
</tr>
<tr>
<td>Any type of claim (NHC)</td>
<td>1362</td>
<td>81</td>
<td>528</td>
<td>26.0% (24.0%–27.9%)</td>
</tr>
</tbody>
</table>

Considerable differences across countries, and between food categories!
<table>
<thead>
<tr>
<th>Country</th>
<th>Claim type</th>
<th>No. of claims</th>
<th>... of which are symbolic</th>
<th>No. of foods with a claim</th>
<th>% of foods with claim (95% CIs)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All countries</td>
<td>Nutrition claim</td>
<td>865</td>
<td>1</td>
<td>423</td>
<td>20.8% (19.0 - 22.5)</td>
</tr>
<tr>
<td></td>
<td>Health claim</td>
<td>392</td>
<td>74</td>
<td>222</td>
<td>10.9% (9.6- 12.3)</td>
</tr>
<tr>
<td>UK</td>
<td>Nutrition claim</td>
<td>247</td>
<td>0</td>
<td>118</td>
<td>29.6 (25.1- 34.1)</td>
</tr>
<tr>
<td></td>
<td>Health claim</td>
<td>85</td>
<td>2</td>
<td>44</td>
<td>11.1% (8.0 - 14.1)</td>
</tr>
<tr>
<td>Netherlands</td>
<td>Nutrition claim</td>
<td>154</td>
<td>0</td>
<td>70</td>
<td>16.8% (13.2- 20.4)</td>
</tr>
<tr>
<td></td>
<td>Health claim</td>
<td>73</td>
<td>50</td>
<td>60</td>
<td>14.4% (8.9- 15.2)</td>
</tr>
<tr>
<td>Germany</td>
<td>Nutrition claim</td>
<td>123</td>
<td>0</td>
<td>64</td>
<td>16.0 % (12.4- 19.7)</td>
</tr>
<tr>
<td></td>
<td>Health claim</td>
<td>82</td>
<td>0</td>
<td>37</td>
<td>9.3% (6.4- 12.1)</td>
</tr>
<tr>
<td>Slovenia</td>
<td>Nutrition claim</td>
<td>144</td>
<td>0</td>
<td>78</td>
<td>18.8% (15.0 - 22.5)</td>
</tr>
<tr>
<td></td>
<td>Health claim</td>
<td>88</td>
<td>7</td>
<td>52</td>
<td>12.5% (0.9- 15.7)</td>
</tr>
<tr>
<td>Spain</td>
<td>Nutrition claim</td>
<td>196</td>
<td>1</td>
<td>93</td>
<td>23.0 % (18.8- 27.1)</td>
</tr>
<tr>
<td></td>
<td>Health claim</td>
<td>64</td>
<td>15</td>
<td>29</td>
<td>7.2% (4.6- 9.7)</td>
</tr>
</tbody>
</table>
Health claims on the market do not correspond to the burden of disease

<table>
<thead>
<tr>
<th>Health Category</th>
<th>% of all DALYs lost</th>
<th>Diet attributable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cardiovascular disease</td>
<td>18.0%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Cancer</td>
<td>17.5%</td>
<td>1.8%</td>
</tr>
<tr>
<td>Musculoskeletal disorders</td>
<td>12.0%</td>
<td>-</td>
</tr>
<tr>
<td>Mental health</td>
<td>9.2%</td>
<td>-</td>
</tr>
<tr>
<td>Other non-communicable diseases</td>
<td>8.2%</td>
<td>-</td>
</tr>
<tr>
<td>Injuries</td>
<td>8.1%</td>
<td>-</td>
</tr>
<tr>
<td>Neurological disorders</td>
<td>7.7%</td>
<td>-</td>
</tr>
<tr>
<td>Diabetes, urogenital, blood, and endocrine diseases</td>
<td>7.1%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Communicable, maternal, neonatal &amp; nutritional diseases</td>
<td>4.5%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Chronic respiratory diseases</td>
<td>4.4%</td>
<td>-</td>
</tr>
<tr>
<td>Digestive diseases</td>
<td>1.7%</td>
<td>-</td>
</tr>
<tr>
<td>Cirrhosis</td>
<td>1.7%</td>
<td>-</td>
</tr>
</tbody>
</table>

Nutrient and other function claims (NOF) (N=185) by ICF Chapter

<table>
<thead>
<tr>
<th>Functions of the digestive, metabolic and endocrine systems of which:</th>
<th>% of all NOF</th>
</tr>
</thead>
<tbody>
<tr>
<td>Digestive and similar functions</td>
<td>40.1%</td>
</tr>
<tr>
<td>General metabolic functions</td>
<td>13.1%</td>
</tr>
<tr>
<td>Weight maintenance functions</td>
<td>14.8%</td>
</tr>
<tr>
<td>Functions of the cardiovascular, haematological, immunological and respiratory systems of which</td>
<td></td>
</tr>
<tr>
<td>Heart and blood vessel functions</td>
<td>7.7%</td>
</tr>
<tr>
<td>Immunological system functions</td>
<td>5.4%</td>
</tr>
<tr>
<td>Mental functions</td>
<td>8.8%</td>
</tr>
<tr>
<td>Functions of the cardiovascular, haematological, immunological and respiratory systems of which</td>
<td></td>
</tr>
<tr>
<td>Neuro-musculoskeletal and movement related functions</td>
<td>11.0%</td>
</tr>
<tr>
<td>Voice and speech functions</td>
<td>10.4%</td>
</tr>
<tr>
<td>Genitourinary and reproductive functions</td>
<td>2.2%</td>
</tr>
<tr>
<td>Functions of the skin</td>
<td>1.6%</td>
</tr>
<tr>
<td>Sensory functions and pain</td>
<td>1.6%</td>
</tr>
<tr>
<td>Others</td>
<td>0.5%</td>
</tr>
<tr>
<td>Others</td>
<td>18.1%</td>
</tr>
</tbody>
</table>

Global Burden of Disease Study, CLYMBOL data
Thank you!

Dr Sophie Hieke
European Food Information Council
sophie.hieke@eufic.org
+32 2 506 89 81 | +49 89 74 036 807