



Summary of a panel debate held on 4 September 2013 to mark the launch of the Kantar Worldpanel insight paper: 'Appetite for Change? Nutrition and the nation's obesity crisis.'

1. INTRODUCTION

There are encouraging signs that the nation's economic health is recovering, but one lasting effect of the financial downturn of recent years is an expansion of UK waistlines. Paradoxically, at a time when the cost of food has become the third biggest concern to consumers in the UK after energy costs and road fuel pricing – and above specific health worries – obesity is on the increase.



Tim Kidd, Managing Director,
UK, Ireland, USA, Kantar Worldpanel

Kantar Worldpanel has seen people's attitudes to food and cooking undergo a significant step change. The amount of time allocated for preparing and eating food has declined as greater reliance is placed on convenience meals. In addition – and in spite of the huge interest in TV cookery programmes – many people no longer associate the idea of 'cooking' with the creation of a unique dish using predominantly fresh ingredients.

A primary outcome of our panel debate was a shared recognition among participants of the need to provide customers with more information about the health implications of their shopping choices and – ultimately – give them greater responsibility for making those choices.

In an age when consumer choice is fundamental to sustaining a dynamic economy, no one – businesses or politicians alike – wants to be seen to be trying to control the marketplace.

Yet, it is clear that greater co-operation and collaboration is needed between the Government, NGOs, trade bodies, food retailers and manufacturers to tackle the issue of obesity: if not, we are in danger of losing the battle of the bulge.

A handwritten signature in blue ink that reads 'TKidd'.

2. THE DEBATE



On a bright September morning on London's Southbank, Kantar Worldpanel hosted a discussion between senior representatives from some of the UK's leading supermarkets (Tesco, Waitrose), as well as the Food and Drink Federation, the consumer organisation 'Which?' and an MP from one of the more deprived areas of the UK. The discussion – chaired by Patrick Butler, Social Policy Editor of The Guardian – coincided with the launch of Kantar Worldpanel's insight paper: '**Appetite for change? Nutrition and the nation's obesity crisis**'. The findings in the paper were drawn from Kantar Worldpanel's continuous measurement of the shopping and consumption habits of 30,000 households in Great Britain: looking at what households buy, how consumers shop, their relationship with food and their attitudes to health.

The subsequent debate emphasised the challenges of closing the gap between what we currently know about the UK's nutritional status and what needs to be done to address the issues of obesity and choice when buying food products.

This paper aims to capture the quality and spirit of the discussion and highlight some of the strong views and heartfelt opinions that were expressed by a range of expert commentators.

Kantar Worldpanel was pleased to be able to act as a facilitator of this important debate and to provide insights based on its consumer data. We would like to thank all those who participated and contributed so enthusiastically both as panellists and guests.

OUR PANEL



Chair: **Patrick Butler,**
Health and Society Editor,
The Guardian



Josh Hardie,
Director of Corporate Social
Responsibility, Tesco



Melanie Leech,
Director General,
Food and Drink Federation



Joanne Lunn,
Company Nutritionist,
Waitrose



Shefalee Loth,
Senior Researcher,
Food and Nutrition, 'Which?'



Giles Quick,
Director,
Kantar Worldpanel



Joan Walley,
MP, Stoke-on-Trent North

3. SUMMARY



Food purchasing decisions are often made for highly emotional reasons and consumers may not always respond well to being told what they should and shouldn't buy – or respond at all. This makes it challenging for well-intentioned campaigns aimed at intervening in or influencing shopping habits – for example, changing perceptions about the benefits of 'healthy meals' – to gain momentum and achieve their objectives.

It is difficult to change the fundamental approach of consumers towards what they choose to put in their food shopping baskets every week. Most shoppers in the UK are unlikely ever to purchase more than one per cent of those product lines available in a typical supermarket during a 12-month period. Also, over time, their underlying purchasing habits will remain largely unaltered.

In the wake of the recent economic downturn, households in the UK are spending a higher proportion of their disposable income on food than they were a decade ago. However, greater reliance on cheaper, pre-prepared and less healthy types of food is leading to an overall decline in the health of the nation and a corresponding increase in our average Body Mass Index (BMI).

There is an acceptance across all parts of the food manufacturing and retail industries – as well as among government and third-party organisations – that dealing with the challenges of obesity and associated health issues can only be achieved successfully through a concerted effort by all stakeholders. At the same time, no retailer wants to risk damaging customer loyalty by failing to offer them the sort of food products they want to buy, even if some of these products are relatively high in fat, salt or sugar.

The challenge is how to educate and support customers to include healthier types of food in their diets – such as fresh fruit and vegetables – so that they are comfortable with choosing to spend more on the food they eat in return for an improved quality in their long-term health. An underlying cultural change in the UK is required in terms of how people see their relationship with food.

Some of the UK's leading retailers and manufacturers have made significant efforts to help empower their customers to make healthier food purchasing decisions. Better labelling on packs with clearer icons, as well as a wider range of healthy options across product lines, go some way towards addressing the challenge of combating obesity. However, the unresolved question in this debate is: who has the ultimate responsibility for ensuring that everyone is aware of what a healthy diet constitutes and – more importantly – is able to afford to eat it?

4. WHAT WAS SAID: IN BITE-SIZED CHUNKS



THE 'PSYCHOLOGY OF FOOD'

"People can have very, very emotional relationships with food, particularly when families and children are involved."

Josh Hardie, Tesco

"The healthiest lines, in the majority of categories, are performing less well than the bulk of the categories. So if...health is not paying for the manufacturer, you have a real challenge. If I strip salt out of my baked beans, and they don't sell, what do I do?" **Giles Quick, Kantar Worldpanel**

"There's a significant behaviour change needed in order to change our relationship with food (and)...to start to reverse the trend in obesity. For that to happen, consumers have got to be ready and willing, businesses have got to be ready and willing, government and NGOs have got to be ready and willing."

Josh Hardie, Tesco

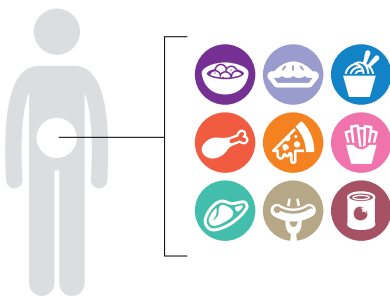
"I think that (our understanding of what) 'cooking' (means) is an interesting one... People think they have cooked a meal when they've literally just heated up some pasta and added some sauce, and that, to them, is cooking, but it's really just 'meal assembly'. (We're) seeing this rise in the 'cook-a-bit' principle as well where it's not necessarily just eating ready meals but...relying more on packaged foods that you're assembling yourselves, maybe cooking a bit of chicken from raw but everything else you're adding (has) come from a pack." **Joanne Lunn, Waitrose**

"I...think there's a real issue with people just understanding what healthy food is. When we have celebrities or the media saying how bread is terrible, and (how) they don't eat carbohydrates, ...most people will say, 'yes fruit and veg is good for you', but a lot of intelligent people I know will also say 'I won't eat bread', so I think we have a real battle even just trying to overcome these basic errors."

Shefalee Loth, 'Which?'

"I think the biggest thing that we have done is to try and change (the) perception that healthy food doesn't taste good, because as soon as a customer is buying what they see being signposted as a 'healthy meal', they assume that it is not going to taste good in the slightest. (With our) 'Love Life' healthy eating ranges, (these are) about the positive... things that you can put into the diet, how great you will feel when you eat wholegrain foods, plenty of fruit and veg, plenty of lean proteins." **Joanne Lunn, Waitrose**

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CHANGING LIFESTYLE FACTORS

"Key to (this debate) is the way in which we don't actually sit down and have meals (together like) we always used to. Tableware, and the table (are), if you like, part of the emotional approach to where food is." **Joan Walley, MP**

"We have a huge amount of insight, a huge amount of understanding about what works in the supermarket; let's use some of that understanding to try and change behaviour because... most of the changes in behaviour are passive changes (mainly the result of the reformulation of food products by manufacturers). At the moment, consumers are...fighting against us, so we're talking about intervention. They (consumers) will either give up and say we can't do this, so we have to intervene in a pretty heavy-handed way; or we continue in the long term with pretty blunt messaging to consumers to try and drive change. It won't be quick, it's taken six or seven (political) administrations to eat ourselves into positions of prop forwards, it's going to take (the same number of) administrations at least to get ourselves down to the size of scrum halves." **Giles Quick, Kantar Worldpanel**

"Part of my fear is that there is a tipping point (in this debate) statistically...around a BMI of 30...a point at which hope appears to be lost and you can see the introduction in the (shopping) basket and eating habits of a lot of nutritionally dense foodstuffs. (While) I'm imputing this, the suggestion is (that people will say) 'I'm not going to succeed now, I've got past the tipping point, there is no hope and, therefore, to hell with it, anything goes.' My worry is that the population is heading towards that tipping point...over half of us are overweight or obese already...(so) once we get to that point of a BMI of 30 then it gets much much harder to turn back. You can turn back from a BMI of 27...but once (it gets) to 30 (turning back is) really, really tough...we need to give people hope and make sure they don't reach that point of potentially no return." **Giles Quick, Kantar Worldpanel**

"...people don't any longer cook meals and rely much more on instant food, on food banks. In Stoke-on-Trent we even had to ration the amount that food banks can serve people. So people aren't cooking. There's also this latest consultation going out in terms of housing standards; we're not planning and designing places that people can cook and sit down and eat at the end of it." **Joan Walley, MP**

"What we're finding in Stoke-on-Trent is that too many people in the generations after the Thatcher years, because of all the unemployment and so on, haven't inherited the same commitment to food that was instilled in previous generations. So it's about how elders – if you like – can share understanding about food." **Joan Walley, MP**

4. WHAT WAS SAID: IN BITE-SIZED CHUNKS

“Supermarkets believe they have a role in helping their customers to make healthy choices. This means making sure that products have front-of-pack labelling with clear icons, so that customers can really easily see at a glance the kind of foods that will help them to get the balance of their diets better.” Joanne Lunn, Waitrose



MAKING INFORMED BUYING CHOICES

“Healthier checkouts, committing to certain levels of promotions, making sure that if you do a promotion there’s always a healthier option available. Those are the sorts of things, I think, across the industry, retailers are looking at.” **Josh Hardie, Tesco**

“Calories and saturated fat (in our food) are growing...so, the choices that we’re making are leading to more saturated fat, more calories coming into the home, and it’s a social problem. The more you earn, in general, the fewer calories per person you will buy for that household. (As a result), those least able, through circumstance, through (lack of) money, are those that are most affected.” **Giles Quick, Kantar Worldpanel**

“As food and drink manufacturers... I believe we have a key role to play, and I’m very proud of what we’ve been doing over the last ten plus years around salt reduction, around saturated fat reduction, around trying to work to give consumers clear information and help them make healthier choices, offer them healthier choices.” **Melanie Leech, Food and Drink Federation**

“The market is seeing that health is still a proposition that connects with consumers and that there is still innovation going on to try and bring those products to market, so I think that they can go hand in hand; the challenge is to help consumers understand that they can go hand in hand and give them the tools and the ability to respond to that.” **Melanie Leech, Food and Drink Federation**

“You can have a perfectly balanced supermarket full of all the right foods and all the right proportions, but we can’t stop the customer going in and filling up a shopping trolley with chocolate bars if that’s what they choose to do. So our customers also have a role in understanding why they should be choosing a healthy diet.” **Joanne Lunn, Waitrose**

“With traffic-light labelling, yes we’ve seen all the retailers agree to use it but very few manufacturers are, so I think if it’s going to have the impact that we want it to, we need to see a bigger sign up from manufacturers across the board. I would like to see the Government’s (Public Health) Responsibility Deal set clearer targets going forward. I think it needs to because, so far, the success hasn’t been as we’d hoped to see.” **Shefalee Loth, ‘Which?’**

“Choice is there, but it’s about empowering, encouraging, leading, twisting consumers’ arms to make the right choices. I think a big supermarket, contains something around 30,000 individual lines. I will buy about 300 in a typical year, and the 300 I buy this year will be pretty similar to the 300 I buy next year. Getting me to change my habits is really tough. Consumers are at the heart of this and can have the ability to make decisions but at the moment (they’re) not making enough of the right decisions so the problem is getting worse.” **Giles Quick, Kantar Worldpanel**

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“Food prices are the third biggest concern to consumers at the moment, their first concern is energy costs, their second is (road) fuel pricing, and then food is what’s driving them. So, whereas health, used to appear quite high on their list of priorities, at the moment it really isn’t, it’s coming fourth, fifth, sixth down their list...when they’re shopping for food...” Shefalee Loth, ‘Which?’

POVERTY VERSUS NUTRITION AND OBESITY

“As I investigated poverty in the UK, it became clear that there was a real issue around food and nutrition and obesity, and...how much you earned and what your income was, often dictated how healthy you were.” Patrick Butler, *The Guardian*

“What’s worked very well over the last decade or so is the steady gradual reduction in sodium in foods that we are selling. It’s been a concerted effort (by manufacturers and retailers) along with changes in consumer behaviour and it’s having an impact on the salt intake of the population. Salt obviously isn’t linked with calories and what we have seen is that this may have inadvertently skewed the kind of siloed nutrient-focused approach only looking at the sodium content of food and not really looking at the bigger picture. Do we (now) need to start discussing limit(s) on the number of calories a (particular) food (product), (say) a main meal or a snack or a dinner can provide? (If you were to) put that out to customers they would push back immediately and say ‘no that’s not fair’, so this idea of nutritional responsibility is so much harder, I think, than the kind of ethical responsibility or sustainability agenda where it’s much easier for a customer and a business to say ‘No, we’re not going to sell that.’”

Joanne Lunn, Waitrose

“Given the low wage economy and zero hours contracts, I think this is very much an issue not just about food manufacturers or retailers, or attitudes to food, but it’s also about the economy, and I think all the (recent) reports show that (the) equality gap is actually widening in areas...across the UK.”

Joan Walley, MP

“People are telling us they’re spending a lot, a higher proportion of their disposable income on food than they were 12 months ago, so I think we’ve got a real challenge...to try and figure out how we can address obesity in the current climate.” ***Shefalee Loth, ‘Which?’***

“If we can start to actually agree on what we think the key behavioural drivers are and really focus on those, then the work we’re doing on price, on reformulation etc, makes sense and makes a difference; but unless we do that, I worry that it’s always (just) going to be incremental benefit.” ***Josh Hardie, Tesco***

“But it’s really all about back 30 or 40 years ago, good food habits were passed on from parent to child; we’ve lost that from a generation, so it’s how we recreate that. It’s not just about what you eat, it’s about how you plan, how you budget and it’s about...the way in which we’ve come to rely more on ready meals. That’s what worries me; it’s the poorest people who are spending less time cooking and having a greater reliance on ready meals.” ***Joan Walley, MP***

“Basically, the issue is that...poorer households are spending more of their money, or a higher proportion of their disposable income, on food. (While) they can’t change their rent or their mortgages...they can change their food bills on a weekly basis and so they’re buying less, they’re trading down, and a real issue for this demographic is waste. That’s why you’re seeing a rise in...processed foods...because they tend to be frozen or ambient, so they don’t suffer the same volumes of waste as buying fresh does.” ***Shefalee Loth, ‘Which?’***

4. WHAT WAS SAID: IN BITE-SIZED CHUNKS

“(Retailers) can (now) follow an individual when they are doing their shop and say, this is the nutritional content of your basket, not of each individual product, this is where you want to be, this is where you are, here’s some help to change that. I think tools like that, very practical, very simple, actually can make a really big difference to what people consume.”

Josh Hardie, Tesco

“(Tackling obesity is) a complicated problem (with) no simple answers (and) with complicated solutions needed.”
Melanie Leech, Food and Drink Federation

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RESPONSIBILITY FOR THE FOOD WE EAT AND THE CHOICES WE MAKE

“I don’t think we can leave it up to the customer to always pick the right food.”
Joanne Lunn, Waitrose

“I absolutely agree that if we try and direct consumers as to what their evening meal should look like – or any particular meal occasion should look like – on a calorie basis or any other basis come to that, we will very quickly get a bloody nose.” ***Melanie Leech, Food and Drink Federation***

“At ‘Which?’, it’s not our job to tell consumers what they should and shouldn’t be eating, but we do live by the ethos that consumers should be able to make informed choices about the food that they eat.” ***Shefalee Loth, ‘Which?’***

“When we talk about joint responsibility and working together, I think one of the things we can do together, and should do together, is (to look at) how you... drive a culture change across the UK and people’s relationship with food, because unless you do that, nothing else is actually going to have the effect that you want. So (it’s about) working together to identify how you drive that culture change, making sure that retailers in particular who have the direct relationship with consumers talk about food in the right way, present food in the right way, as well as selling it in the right way. And for us one of the areas I’m really interested in is making that absolutely personal.” ***Josh Hardie, Tesco***

“Without (an) overarching sense of the value of food and the whole issue of sustainability, (nobody) quite know(s) where they’re travelling to, everybody’s a bit in the dark and it’s a ‘silo’ mentality. Government has a responsibility to put forward a sustainable...agenda linked to the whole security and supply of food.”
Joan Walley, MP

“We take our role (as retailers) incredibly seriously and I think the responsibility surely lies within us...especially within our own brand(s)...to ensure that we’re not including ingredients that we know harm customers. For example, we’ve banned hydrogenated vegetable oils (the source of trans fats) in our Own Label (products) since 2005.” ***Joanne Lunn, Waitrose***

“We have to have something more than a ‘nudge-nudge’ approach and we need to have regulation because self-regulation to me, just seems to be failing.” ***Joan Walley, MP***

“I think the Government needs to set clearer targets on how (reducing calories in the nation’s diet) is going to happen so, for example, looking at the foods that contribute the most calories and targeting those for reformulation to start with, otherwise everyone’s going to look at different foods and overall it’s not going to make a huge amount of difference.” ***Shefalee Loth, ‘Which?’***

“If enough people make enough noise (nutritional standards have) got to become an issue for the next general election, so that actually all the different parties can say ‘this is the value that we give to food’, there will be a clear responsibility in the Department of Health, jointly with the Cabinet Office and with DEFRA and Education, to (get) this issue on to the political and policy agendas.” ***Joan Walley, MP***

“Whether it’s about the products and what’s in them, or the communication and how we’re speaking to consumers, or what else we’re doing to help them to lead healthier lives and make choices easier for them...it all needs to fit together, otherwise the risk is (that) the total is much less than the sum of the parts...” ***Melanie Leech, Food and Drink Federation***