

Teads INTELLIGENCE

Teads UK Free From research

(Fieldwork Jan 4th – Jan 6th 2022)

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KANTAR



Methodology

- This study was conducted in Great Britain via OnLineBus, an Internet omnibus survey.
- **Sample size** – a sample of 1239 GB adults aged 16+ were interviewed.
- **Interviewing** - Interviewing was conducted by online self-completion from 04/01/2022 - 06/01/2022 (M Week 01).
- **Weighting** – The sample has been weighted to represent the adult population of Great Britain 16+.

Executive summary

With strong growth and sales predicted to far exceed the £1bn mark in 2021*, the UK freefrom sector is booming. UK consumers' awareness of both dairy-free and eco-conscious products continues to drive this shift and media coverage around events such as COP26 has helped further accelerate awareness. But beyond the freefrom sector alone, sustainability is important for all brands to understand as it passes truly in the mainstream. But how important is sustainability today vs. other factors? How does this vary between age groups? How was Christmas 2021 affect and what is the near term outlook in to 2022?

To provide new insight on this topic, Teads worked with some major food manufacturers and retailers and employed Kantar** to survey 1,236 UK consumers (16+) between Jan 4th – Jan 6th 2022. The survey examined aspects such as the factors driving food choice and how important sustainability is vs. other factors. Furthermore we looked to understand specifics such as the impact of COP26, the outlook on Veganuary and the role of social media in influencing consumer change.

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Some key findings include:

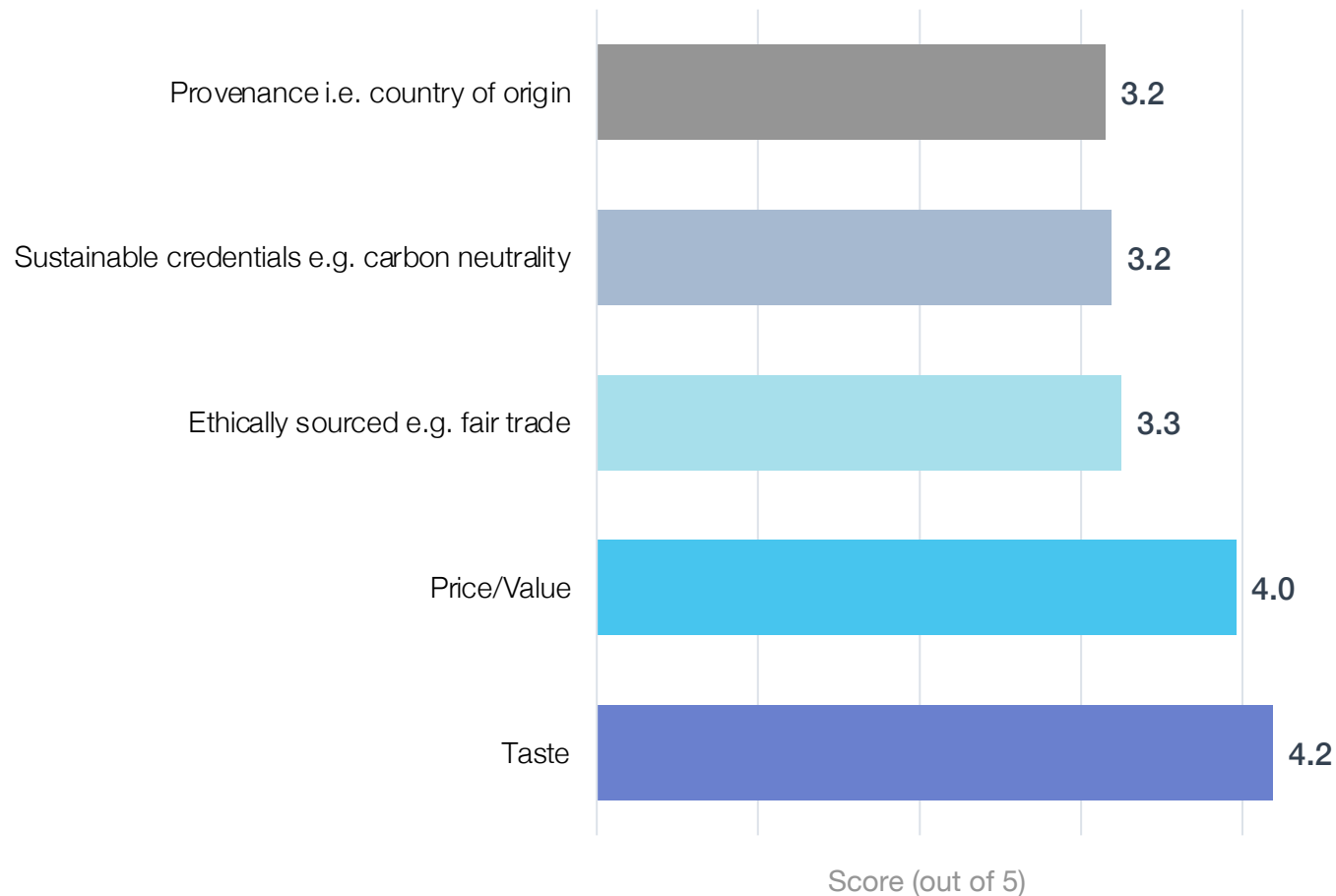
- Almost half (49%) of UK consumers are looking to reduce their carbon footprint through the food choices they make in 2022
- 40% of the population made more sustainable choices when shopping for Christmas food in 2021
- COP26 has made almost one third (31%) of the population more aware of the food choices they make
- For those moving towards plant based diets in 2022, sustainability is as great a motivation as wellness in making this change
- Mainstream news has more impact (VS, social media) triggering environmental concerns across all age groups
- Men are more likely to follow Veganuary than women
- Almost 60% (57%) of consumers don't trust sustainability messages communicated through social media
- 16-24 year olds are the early adopters of freefrom products and beyond milk, there is likely to be strong adoption in 2022

Sustainable credentials is now on par with ethical sourcing and provenance as a factor for choosing food brands in the UK



Sustainable credentials is now a mainstream factor in how UK consumers choose their food brands

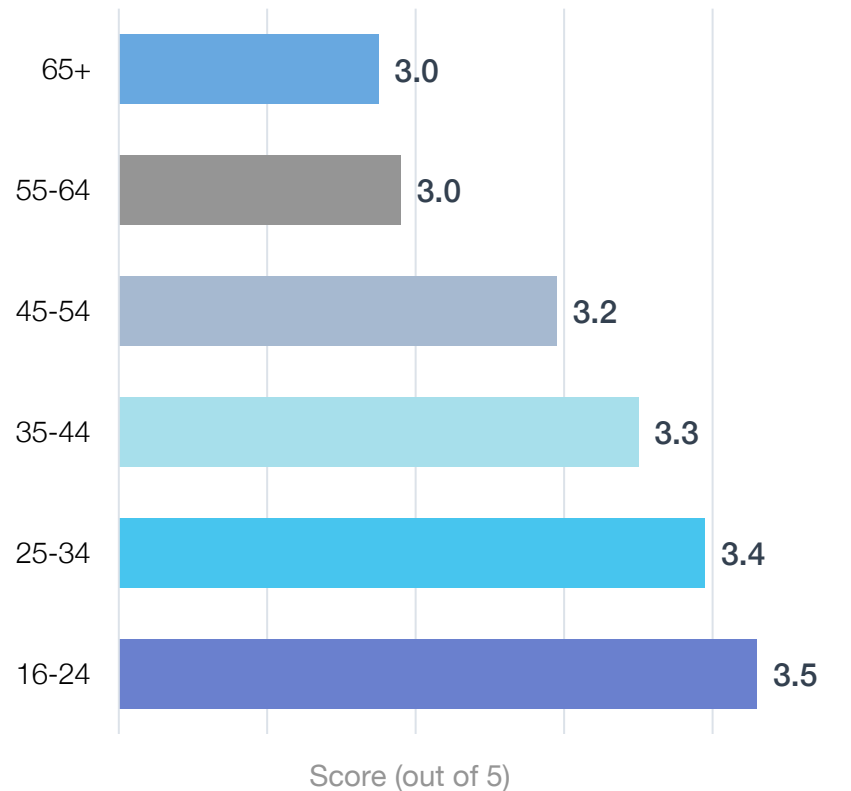
Q: How important are these factors for you when choosing a food brand?



Clearly price and taste remain the most significant factors in choice but sustainability has quickly moved in to the mainstream with UK consumers.

The topic of sustainability resonates strongest in younger age groups

A: Sustainable credentials e.g. Carbon neutrality



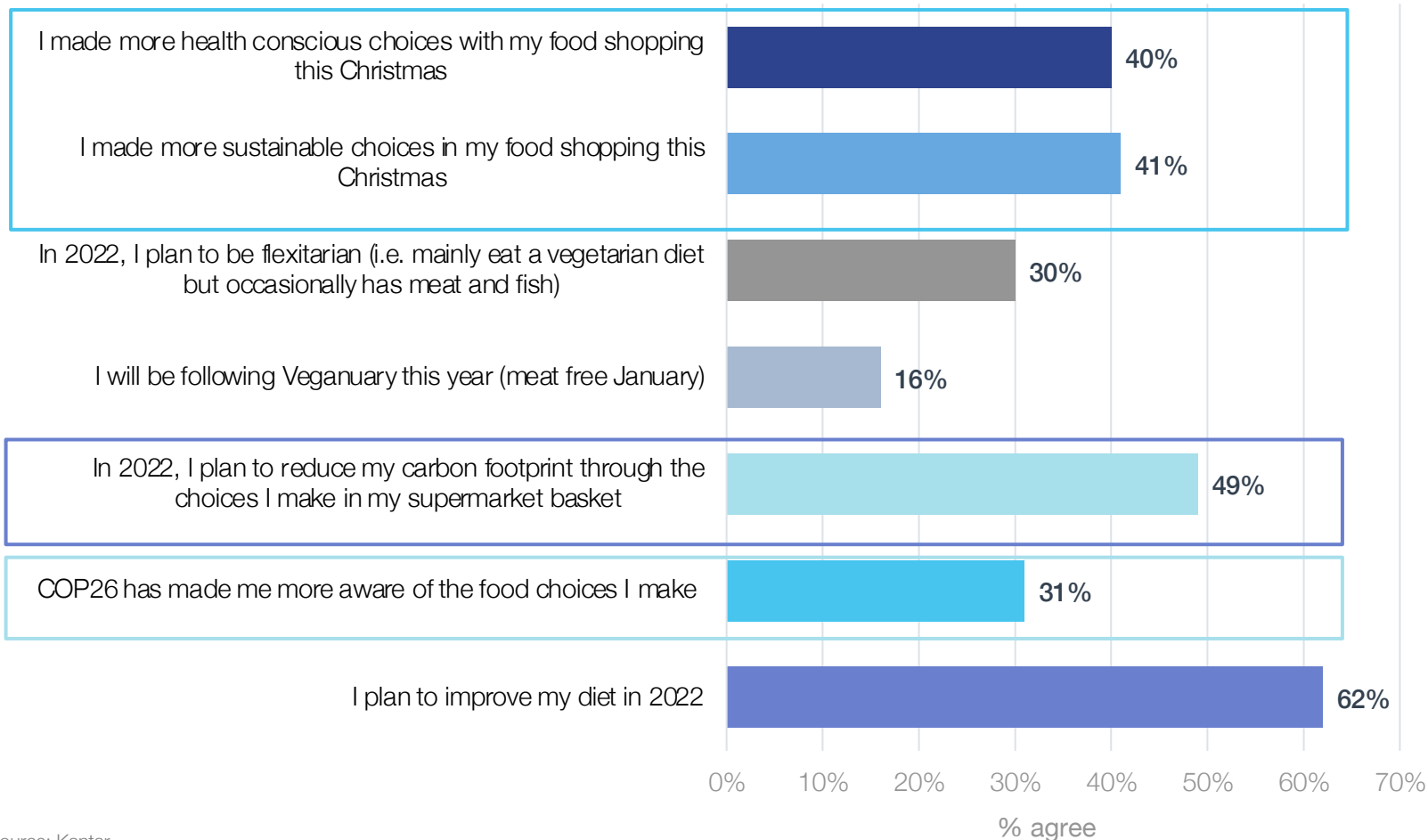
But interest is equal across income groups and UK regions indicating that the topic transcends socioeconomic factors.

Half of UK consumers are planning to **reduce their carbon footprint** through the food choices they make



Beyond the usual New Year's resolutions, we are seeing sustainability as a catalyst for change

Q: Do you agree with the following statements?



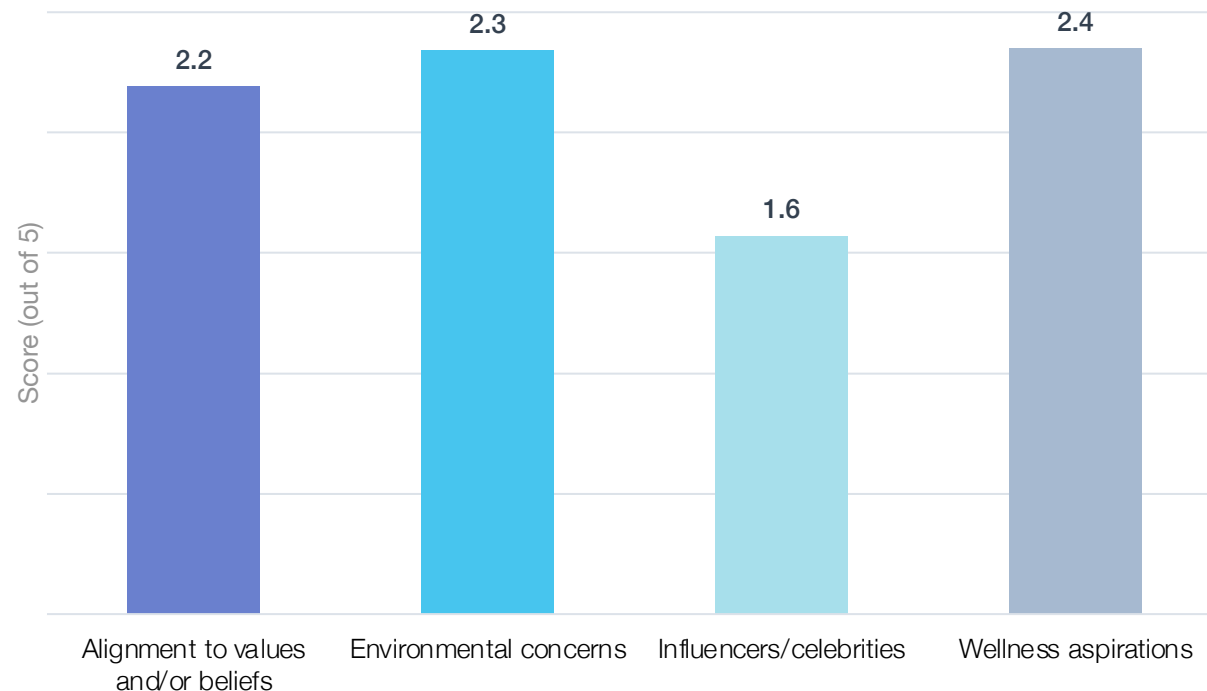
Almost ½ of the population plan to reduce their carbon footprint through their food choices

Over 40% of the population claim to have made more sustainable choices when Xmas food shopping last year

COP26 resonated with almost 1/3 of the UK population, making them more aware as to the link between food and climate change

For those planning on moving towards a plant-based diet, environmental concerns are as important as wellness aspirations

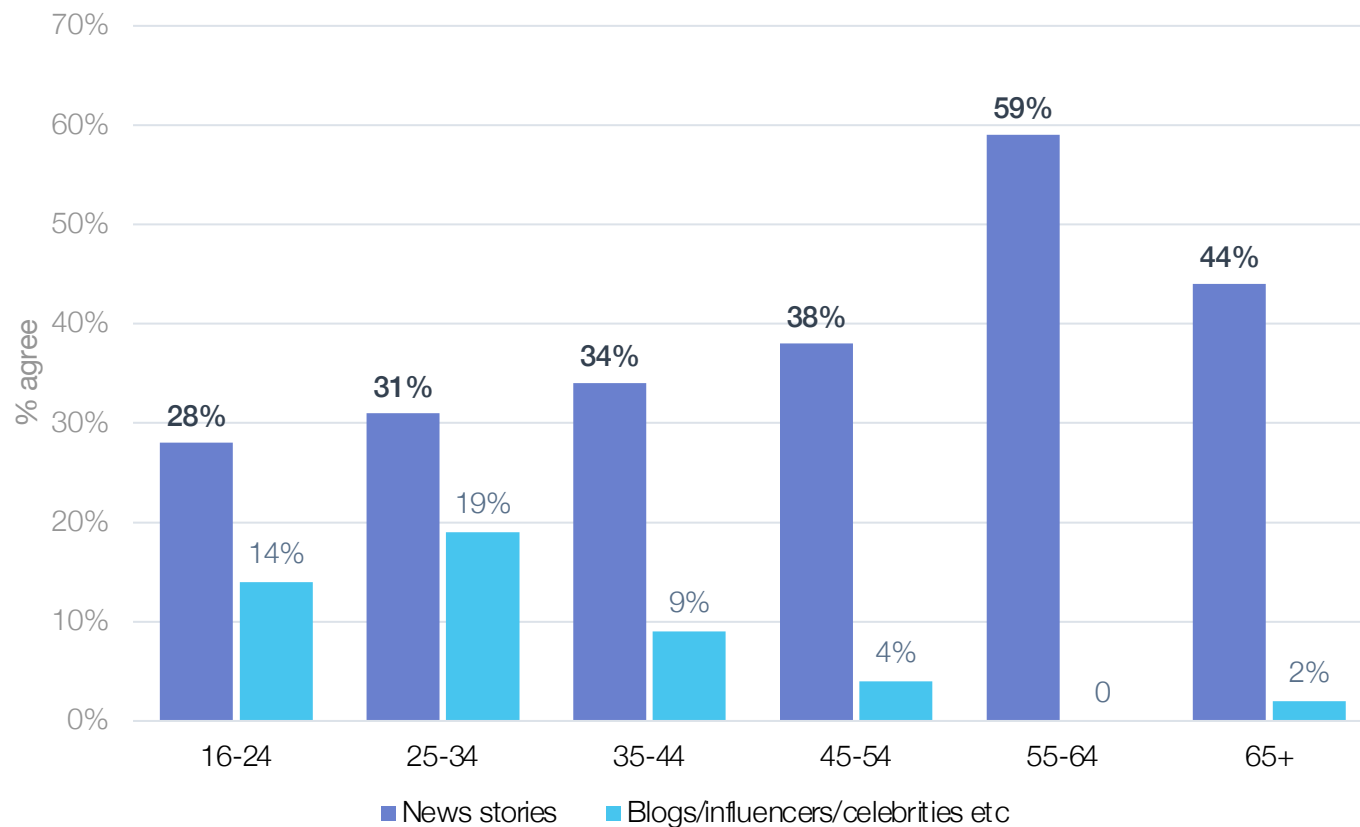
Q: If you are planning on moving to a more plant based diet in 2022, how important were these factors in your decision



Traditionally, moves towards vegetarianism/veganism have been driven by personal beliefs and/or a drive to improve health but environmental concerns now ranks equally to wellness as the most important factor driving this change of behaviour.

Mainstream news sources remain a powerful influence over the population

Q: What factors helped trigger your environmental concerns?

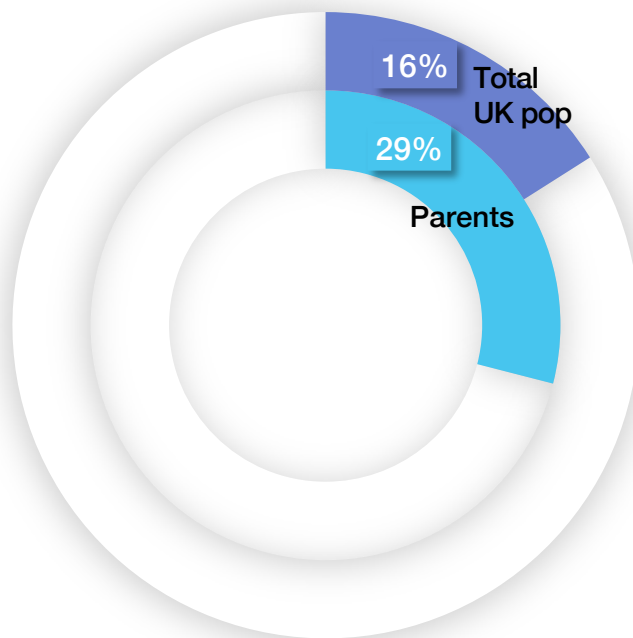
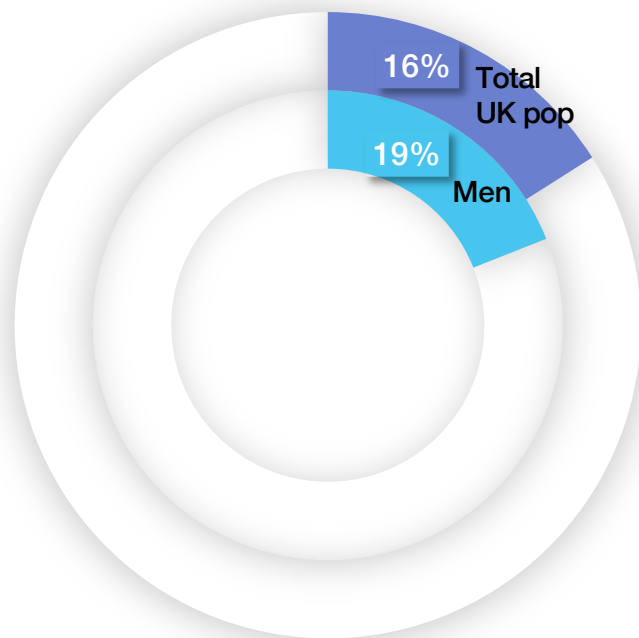


Across all age groups, the importance of News as an influence - vs social media factors - is significant. This effect becomes starker with age.

The results overall show the relative power of credible, verified journalism with regards to this most important of subjects.

Men and Parents are much more likely to follow a Veganuary this year

A: I will be following Veganuary this year (meat free January)



Whereas most responses on sustainability and improved health index towards females, Veganuary specifically runs counter to that trend.

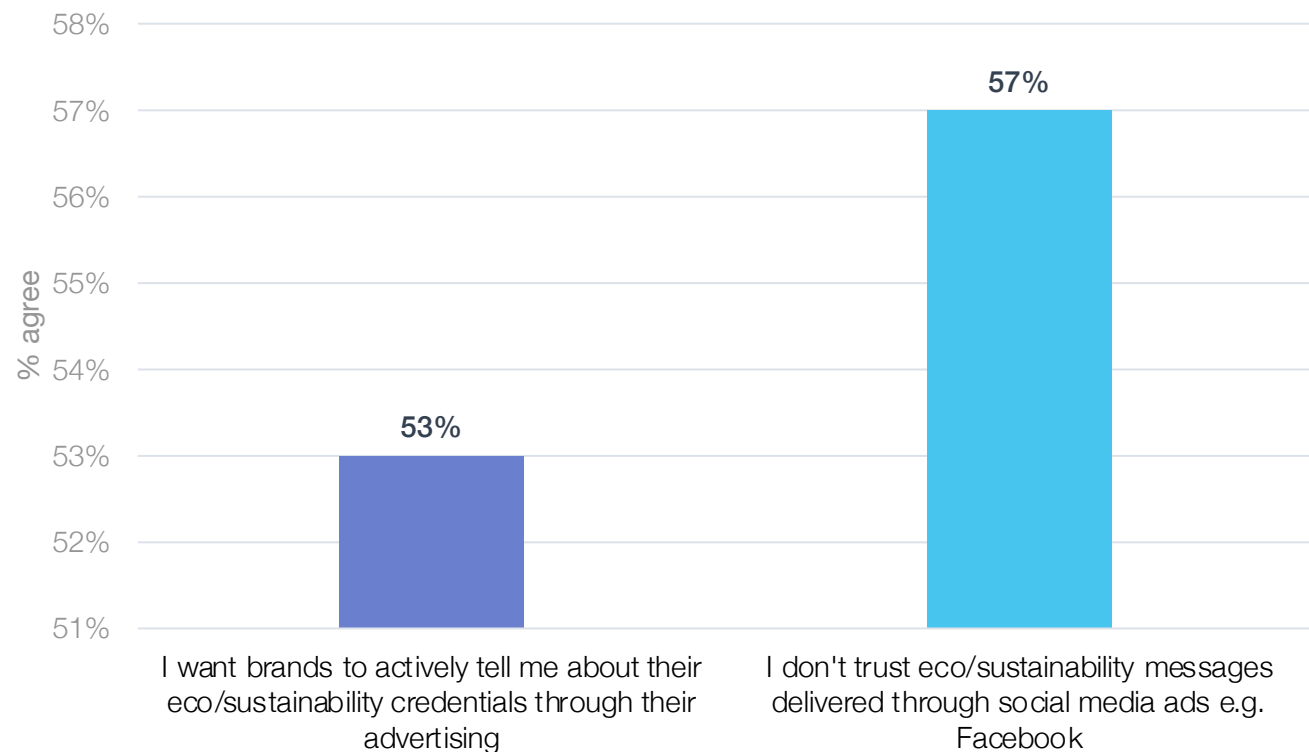
But the propensity to follow Veganuary is much higher in those under 35 as per most other trends within this category

Almost 60% don't believe that social media is a suitable medium for brands to communicate sustainability messages



People want to hear from brands but **don't trust** it to be communicated through **social media**

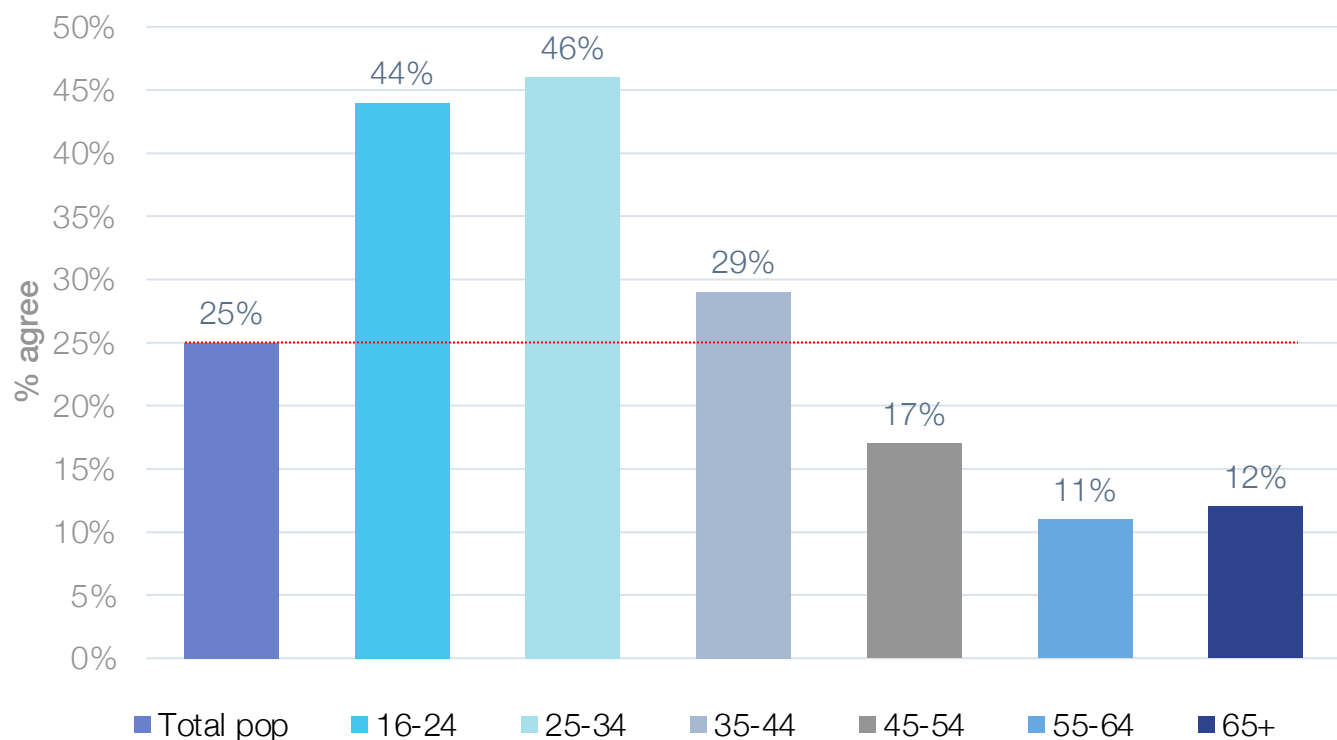
Q: Do you agree with the following statements?



More than half of the UK population now want to hear what brands are saying around their sustainability credentials but almost 60% don't trust social media as a credible source for this to be conveyed

1/4 of the population are strongly impacted by influencers but this is mainly in those under 35

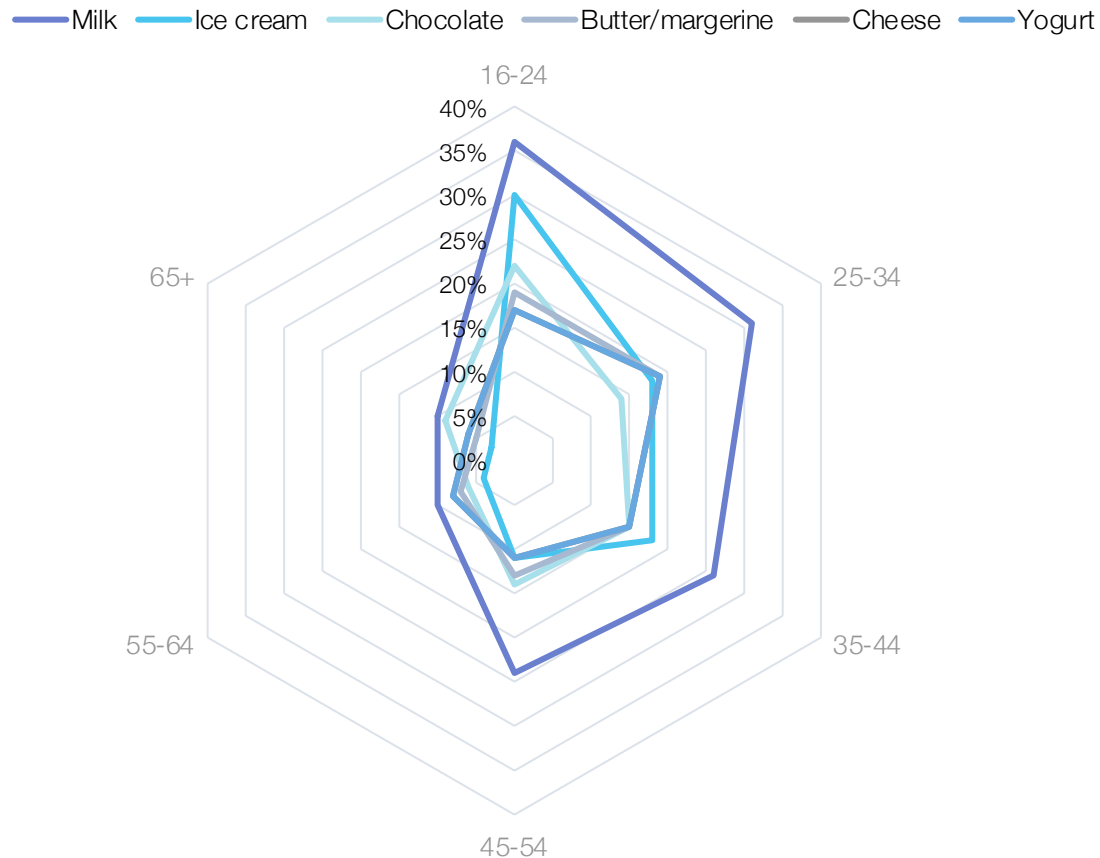
A: Influencers/brand ambassadors have a strong impact on my perception of a brand's eco/sustainability credentials



With almost 50% in the 25-34 age bracket in agreement, the role of influencers is without doubt but brands would be wise avoiding this where target audiences are older than 35 as it risks undermining credibility

Dairy free substitutions – a category ready to explode in 2022 as product choice increases

Q: Which of these dairy categories, if any, have you made dairy free substitutions in the last 3 months?



Across all ages, milk is by far and above the most substituted product with almost 25% of individuals substituting in the last 3 months.

16-24 are early adopters across all main products. Other than milk, most products are currently around the 10% level so likely to experience significant growth within 2022

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Thank you.