

appinio

FMCG

# Food & Beverage Report 2023

Unveiling Consumer Insights and Trends  
in the Food and Beverage Sector

No. 3 · August 2023 · Version for the United Kingdom



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## About the report

To interactive dashboard



### Understanding Consumer Behaviour in the FMCG Market: Exploring Diet, Shopping Patterns, and Brand Awareness

Understanding how consumers interact with FMCG and catering to the evolving needs of diverse consumer segments is crucial for businesses, especially in a highly competitive market. That's where Appinio comes in.

We are dedicated to delving into the fascinating world of **consumer preferences, dietary choices, grocery shopping behaviour, and brand awareness within the FMCG landscape**. With our latest survey, we provide you with all the insights you need to make your business thrive.

In this report, we will explore consumers' lifestyles and habits, examining whether they are flexitarians, vegans, or have made other dietary choices, as well as determining how these choices affect their grocery shopping behaviour.

Additionally, we will delve into their favourite supermarkets and what sets them apart, ultimately crowning one as the top choice.

We'll then explore new trends, such as NoLo (Non and Low)

alcoholic beverages, and investigate consumers' guilty pleasures when it comes to hyper-processed foods.

To provide a comprehensive analysis, we will also compare the attitudes and behaviours of British consumers against those in Germany, and the United States.

Ready to gain that competitive advantage?

#### About Appinio

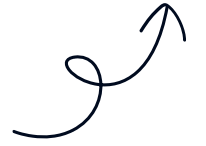
Appinio enables companies to get thousands of opinions from specific audiences in minutes, validating decisions and ideas in real time. As the world's fastest market research solution, Appinio delivers consumer feedback from 90+ markets for over 2000 clients across a wide range of industries.

# Want more insights?

To interactive dashboard



Click on the icon and discover even more insights!



Interested in a specific target group or just curious to see the full data set for yourself?

Then click on the icon (on every page of the report) and discover the power of the **Appinio interactive dashboard!**

Choose the chart visualisation you like best, use the filter function to see only what you're interested in or split the entire survey according to a specific answer.

Everything is possible on the Appinio dashboard, just ask us!

01

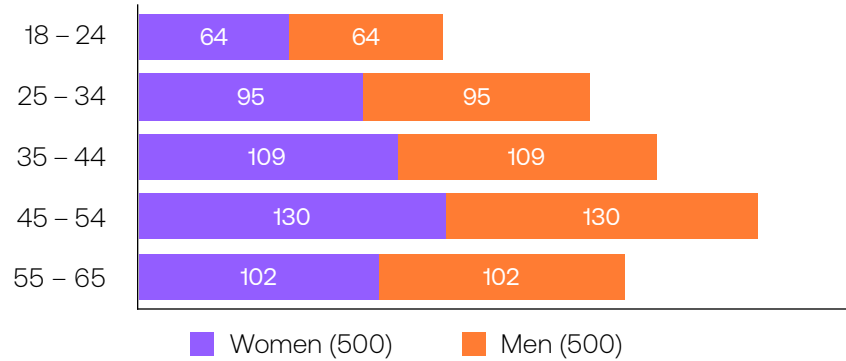
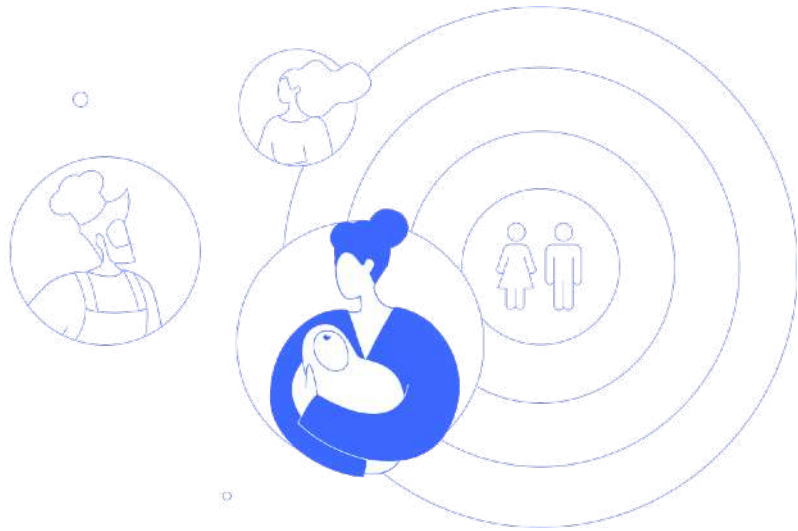
# Snapshot of Respondents

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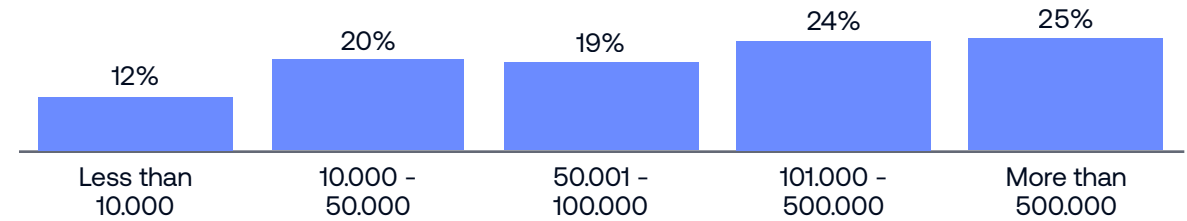
# Snapshot of respondents

## Age & Gender

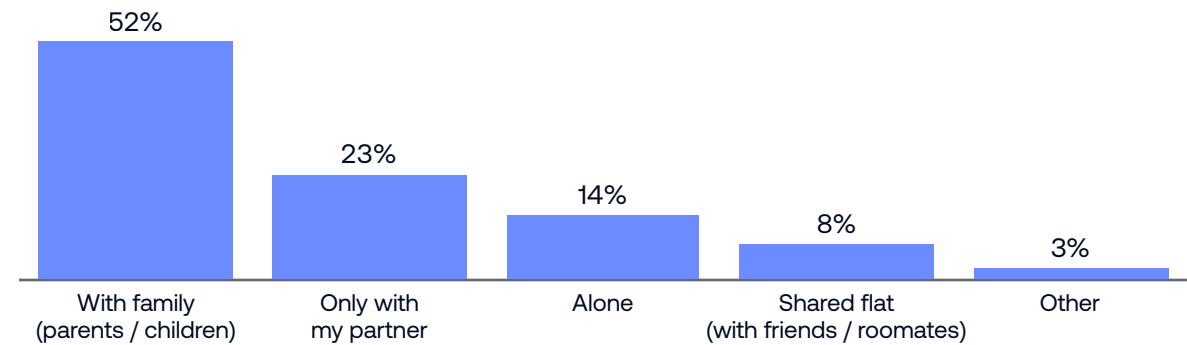
Of The respondents at a glance



## How many people live in your city?



## Which of the following best describes your current living situation?



# The respondents at a glance

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Which of the following statements best describes your role in your household?

**72%**

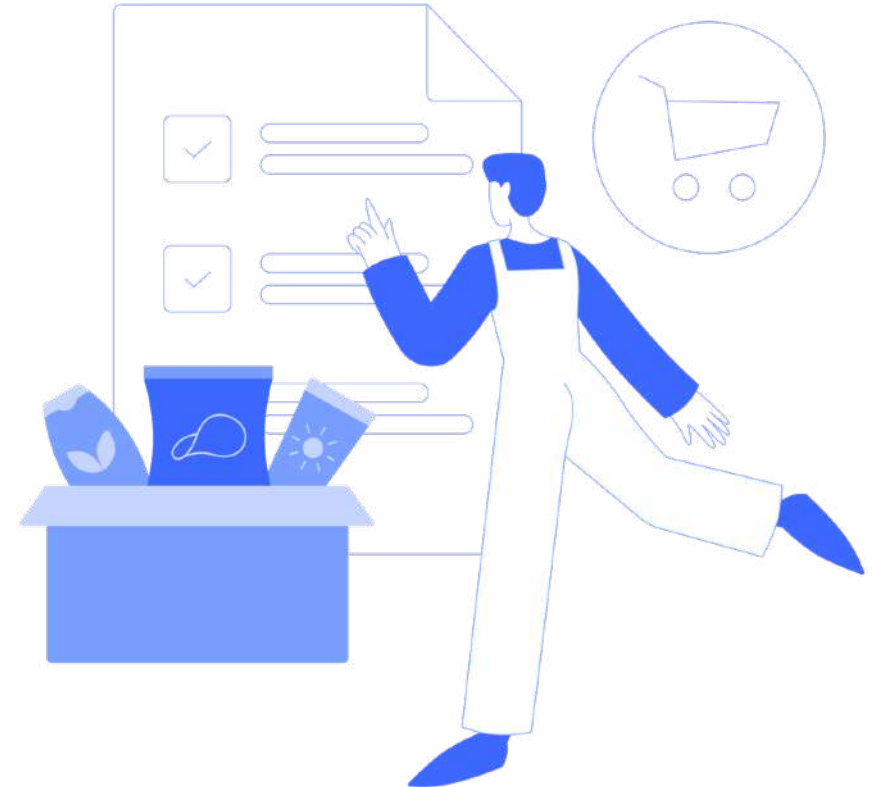
I decide and do all (or at least half of) the shopping myself

**22%**

I have a say in what is bought for my household, but I don't usually do the shopping myself

**6%**

Somebody else decides and does the shopping for me / I have no say



01 The respondents at a glance

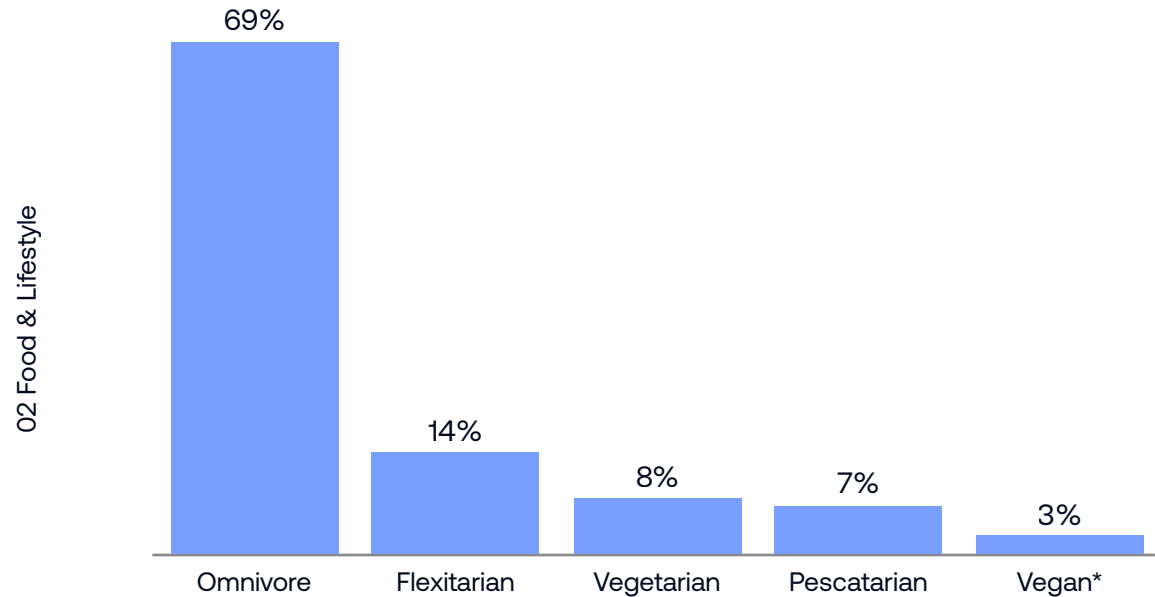
02

# Food & Lifestyle

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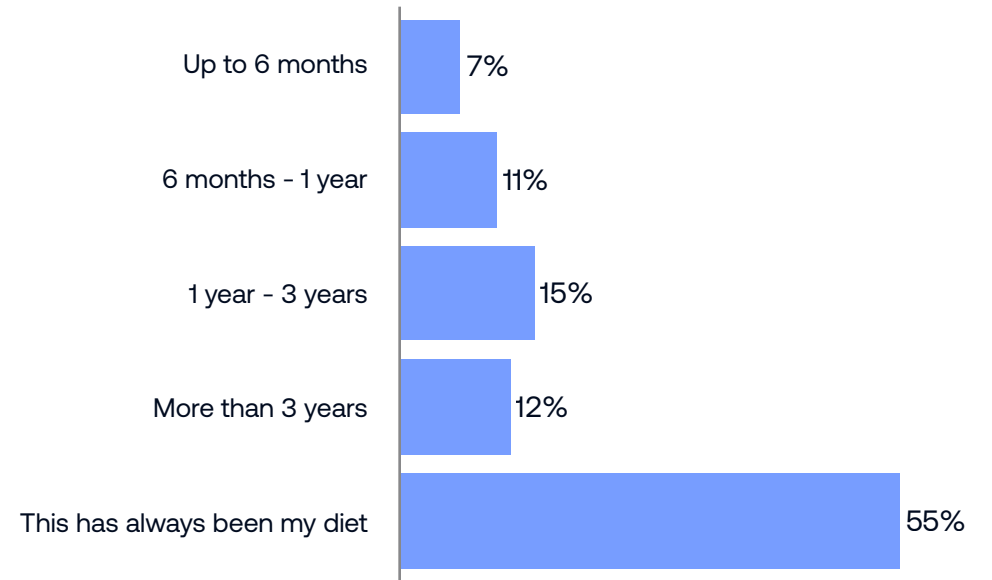
# One in five Brits have changed their diets in the past year

Which of the following best describes your current diet?



- **Omnivores** are more likely than other groups to say this has always been their diet (73%).
- There are no significant difference in diets among age groups.

How long has this been your diet for?



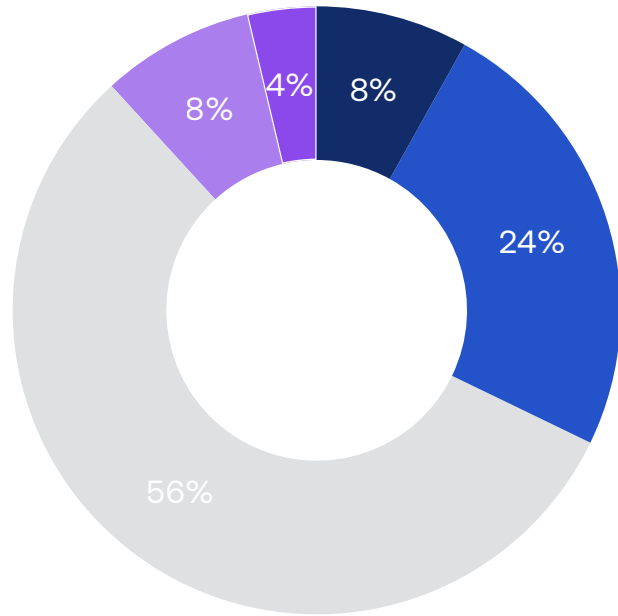
- **Pescatarians** are more likely to say they have been sticking to this diet for 1-3 years (50%), followed by **flexitarians** (37%).
- It is interesting to notice that one in five (18%) Brits have changed they way they eat in the last year.



# Meatless Monday? Only for one third of Brits

In the last 6 months, how often did you consume meat products?

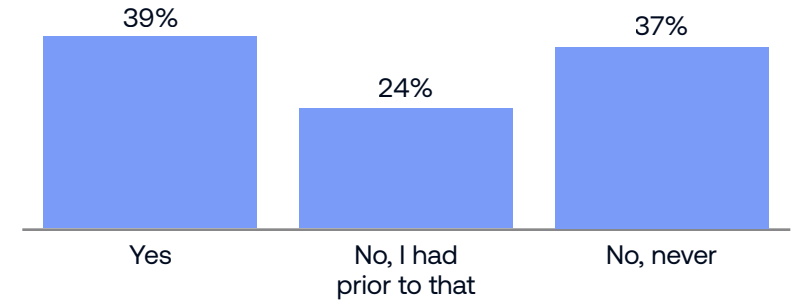
Respondents that eat meat



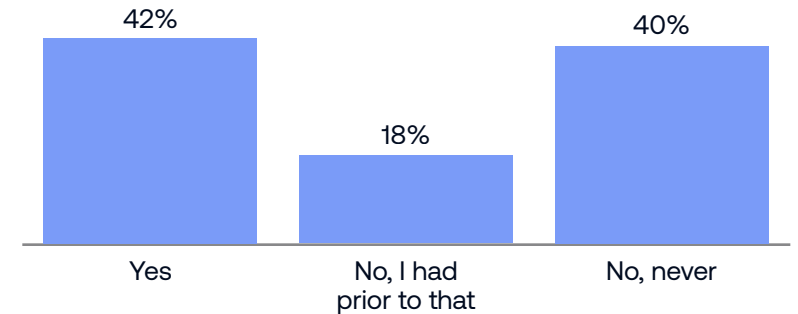
- Much less than before
- Less than before
- As much as before
- More than before
- Much more than before

02 Food & Lifestyle

In the last 6 months, have you consciously bought a **meat substitute** for the very first time?



In the last 6 months, have you consciously bought a **non-animal alternative to cow's milk** for the very first time?



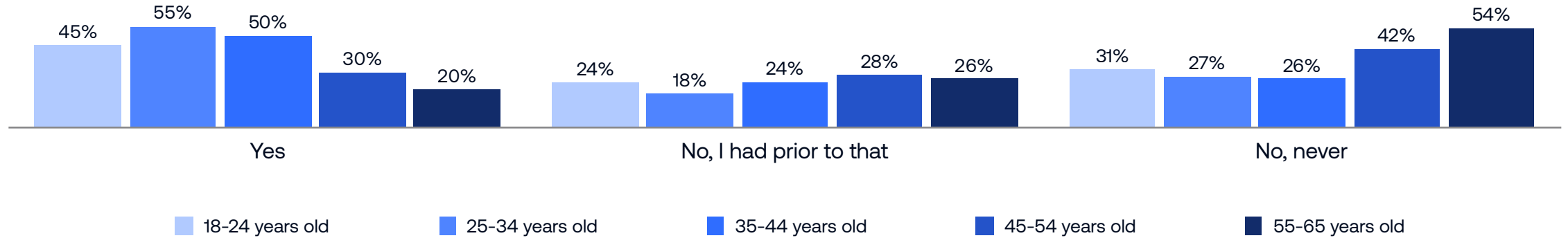
# British Millennials are up to date even with the latest food trends

In the last 6 months, have you consciously bought a **meat substitute** for the very first time?

Split according to age

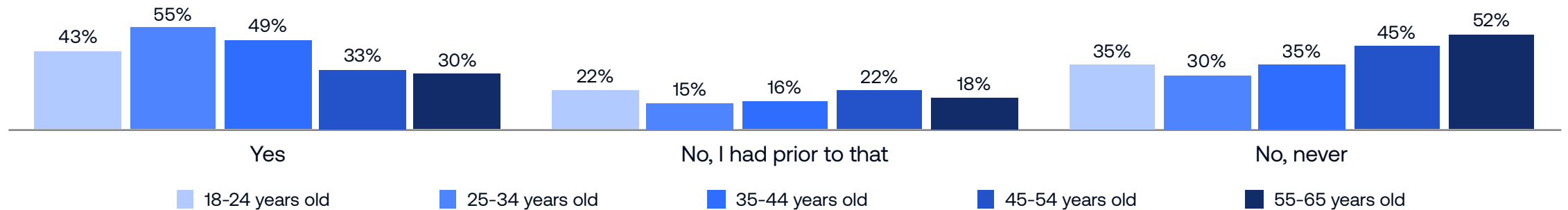


03 Grocery shopping behavior



In the last 6 months, have you consciously bought a **non-animal alternative to cow's milk** for the very first time?

Split according to age



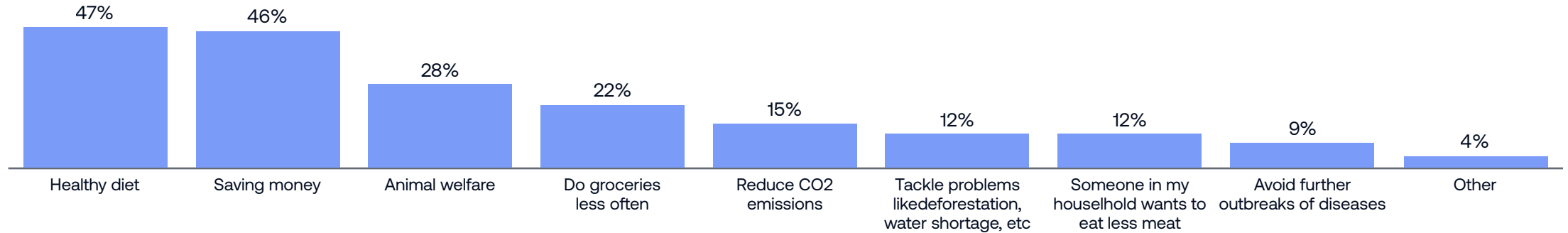
# A life without meat? Brits are not sure about that

To interactive dashboard



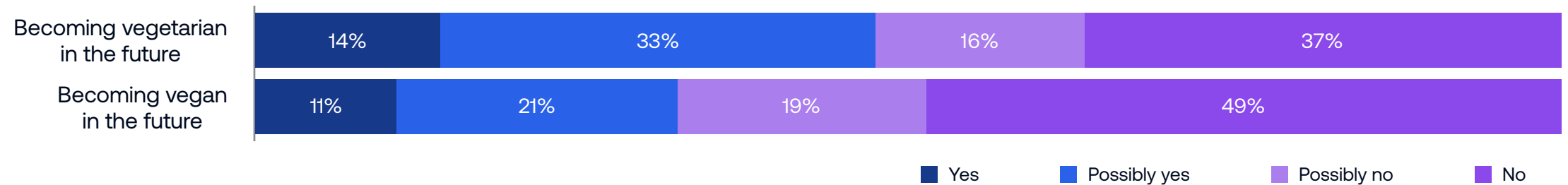
What are the main reasons why you've eaten less meat than before in the last 6 months? (Multiple choice, up to 3)

02 Food & Lifestyle



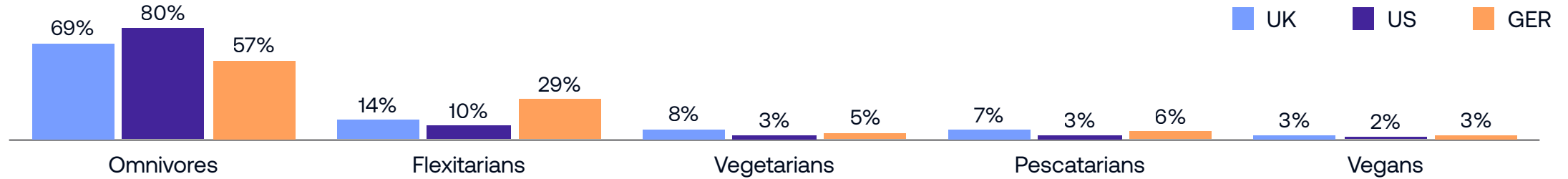
Could you imagine the following scenarios?

Respondents that eat meat



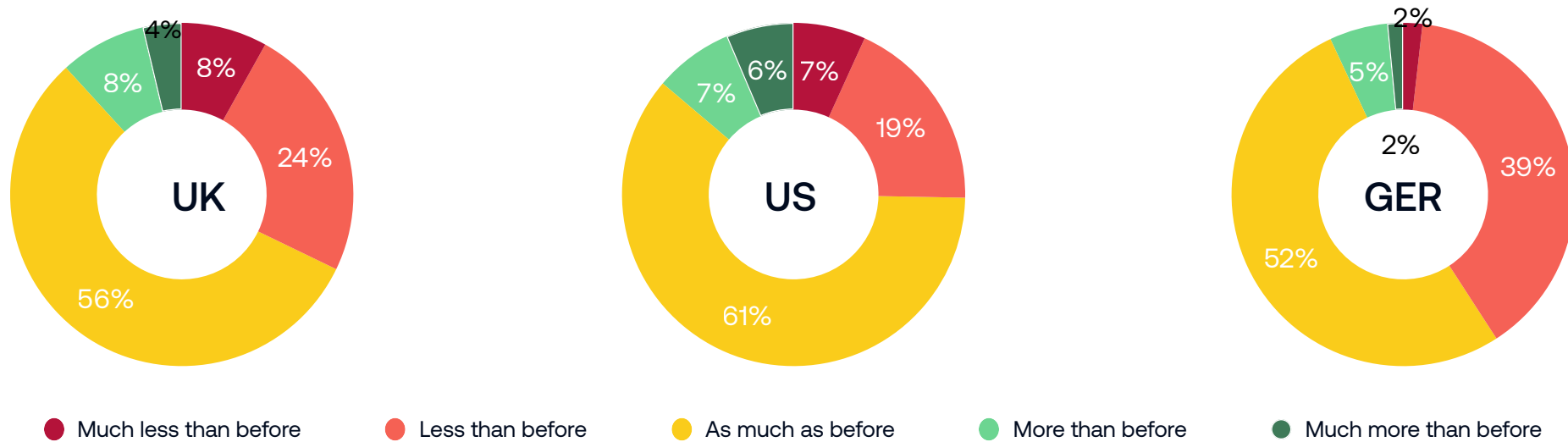
# Let's go abroad: the highest percentage of omnivores is in the US

Which of the following best describes your current diet?



02 Food & Lifestyle

In the last 6 months, how often did you consume meat products?



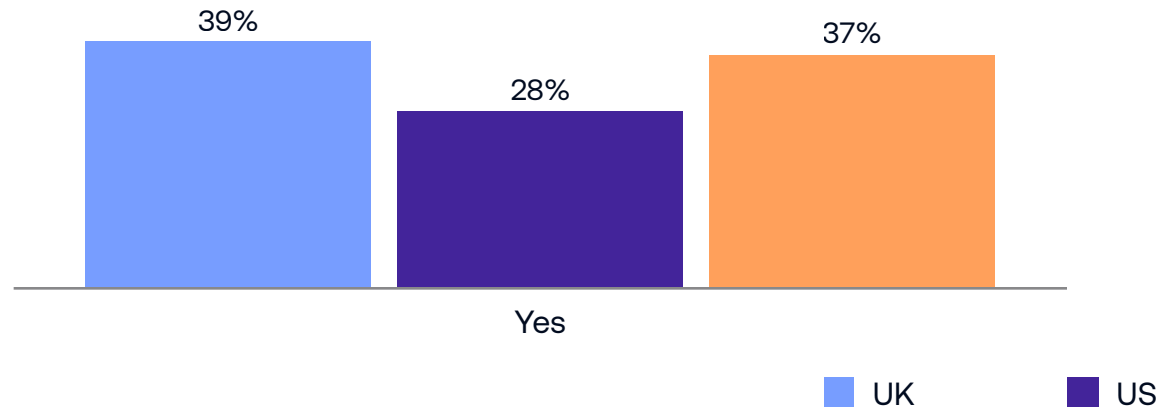
# Let's go abroad: Brits are the most open to try new things



In the last 6 months, have you consciously bought a **meat substitute** for the very first time?

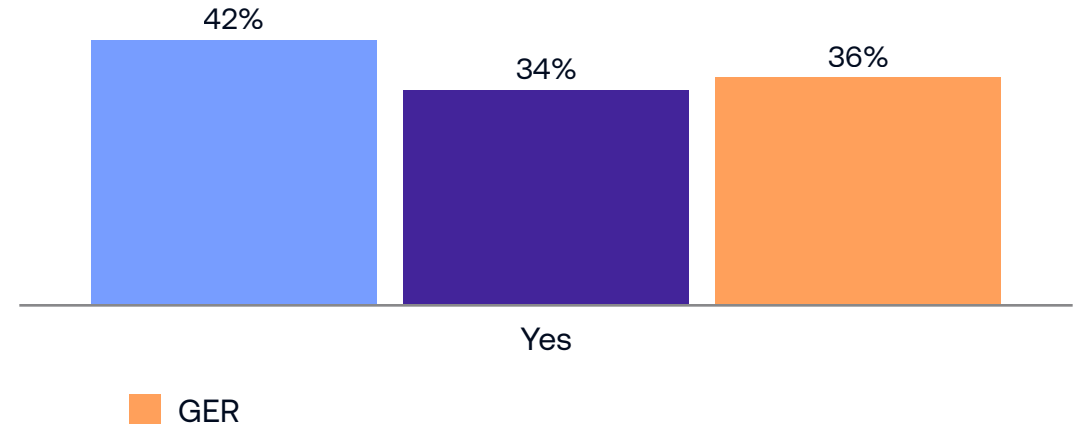
Respondents that have bought a meat substitute

02 Food & Lifestyle



In the last 6 months, have you consciously bought a **non-animal alternative to cow's milk** for the very first time?

Respondents that have bought a plant based alternative milk



- **Health-consciousness:** For Americans (58%), Brits (47%), and Germans (54%), health consciousness emerges as a primary driver.
- **Dollars on the menu:** Germans (50%), Brits (46%), and Americans (45%) are choosing meatless alternatives in effort to try to save money.

- **Ethical eaters:** Growing concern for animal welfare in shaping dietary preferences resonates the strongest in Germany (44%), followed by the UK (28%) and in the US (24%).

03

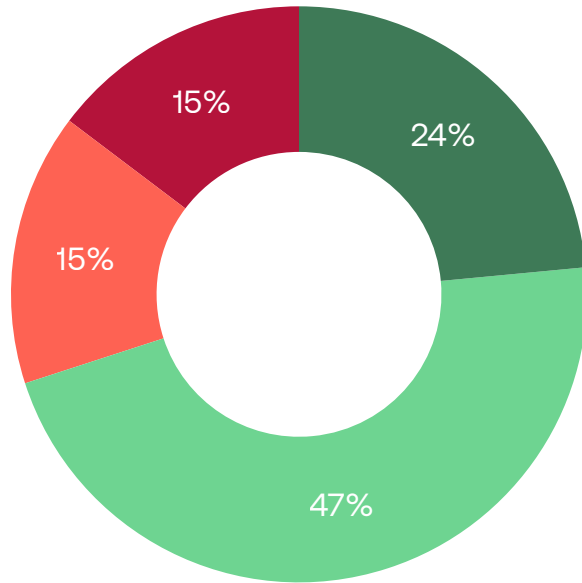
# Grocery Shopping Behaviour

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# Grocery shopping is alright, as long as Brits don't think about the bill...

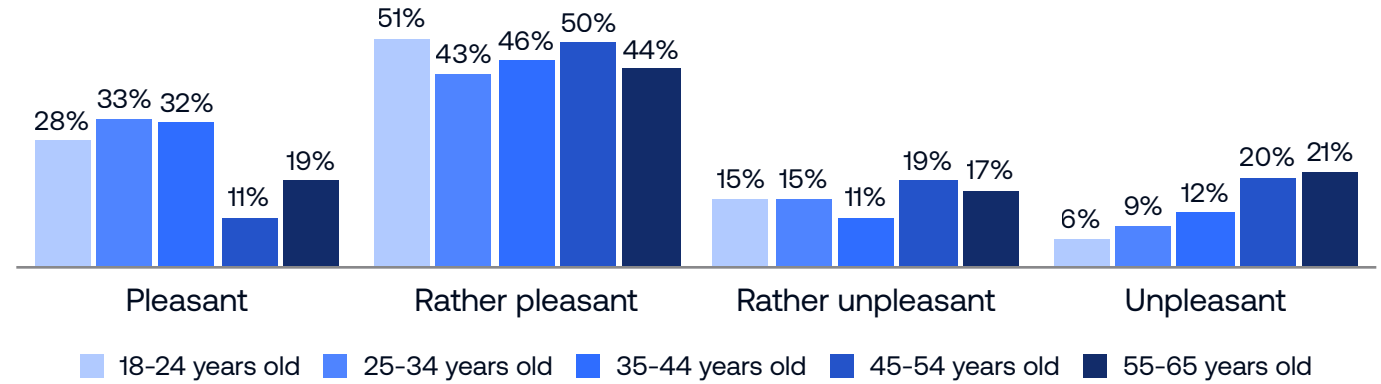
"For me, grocery shopping is something..."

03 Grocery shopping behaviour

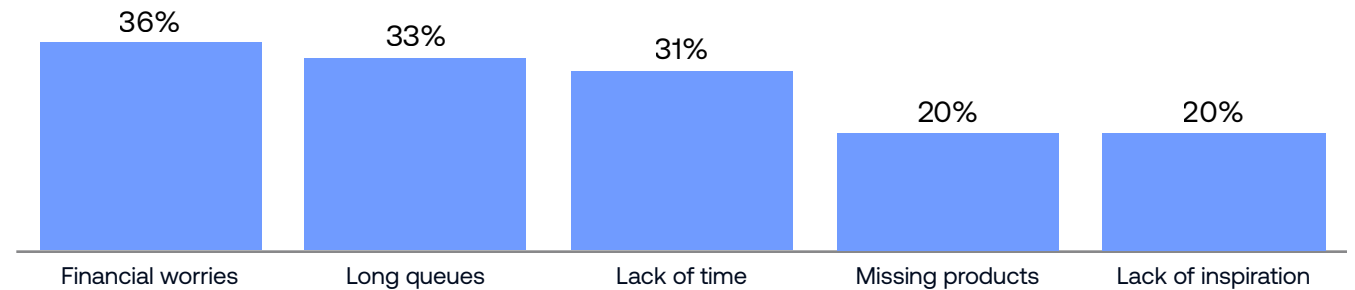


- Pleasant
- Rather pleasant
- Rather unpleasant
- Unpleasant / a chore to be done

Split according to age



What are the main aspects that make grocery shopping unpleasant for you? (Multiple choice, top 5)



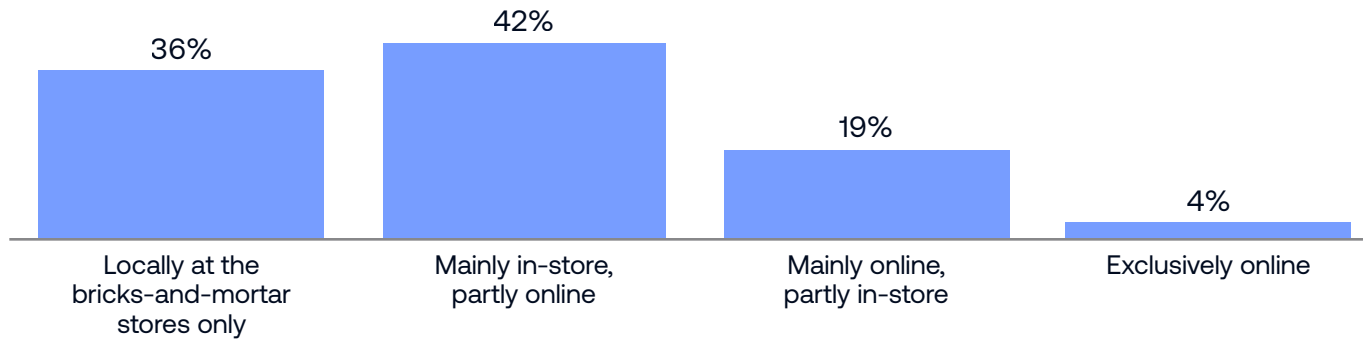
# Despite increasingly grocery shopping online, a physical experience wins Brits over

To interactive dashboard

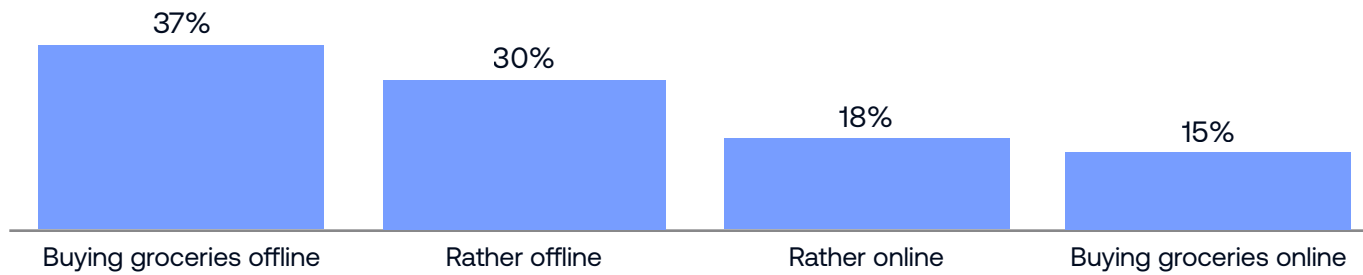


03 Grocery shopping behaviour

In most cases, do you usually shop...



In general, which do you prefer?



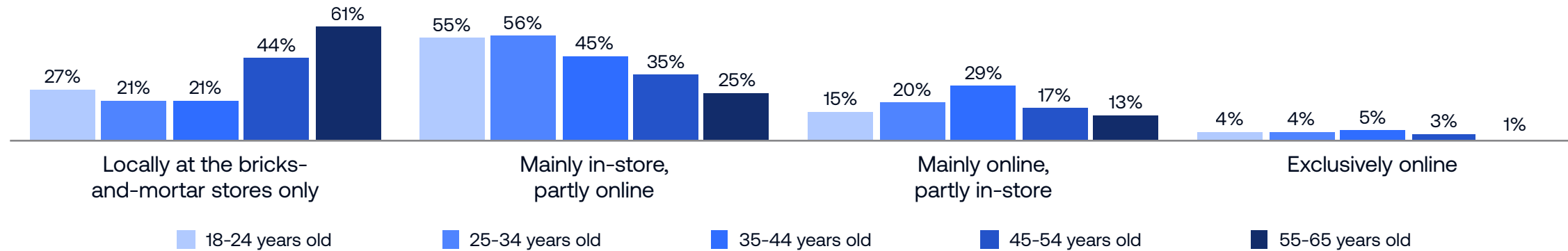


# The younger the respondents the more open to online grocery shopping

03 Grocery shopping behavior

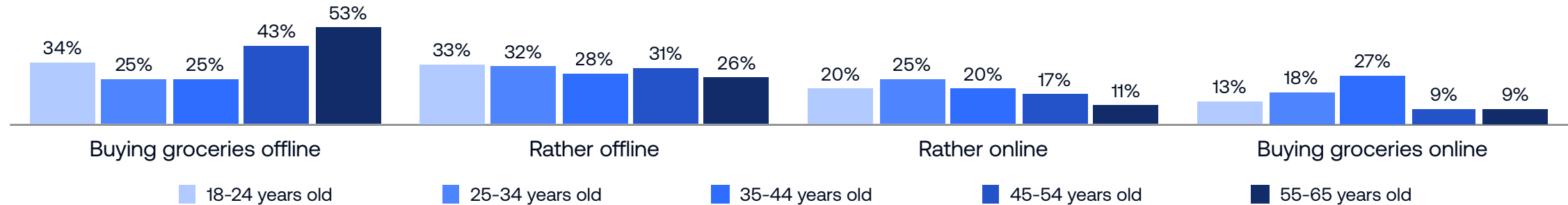
In most cases, do you usually shop...

Split according to age



In general, which do you prefer?

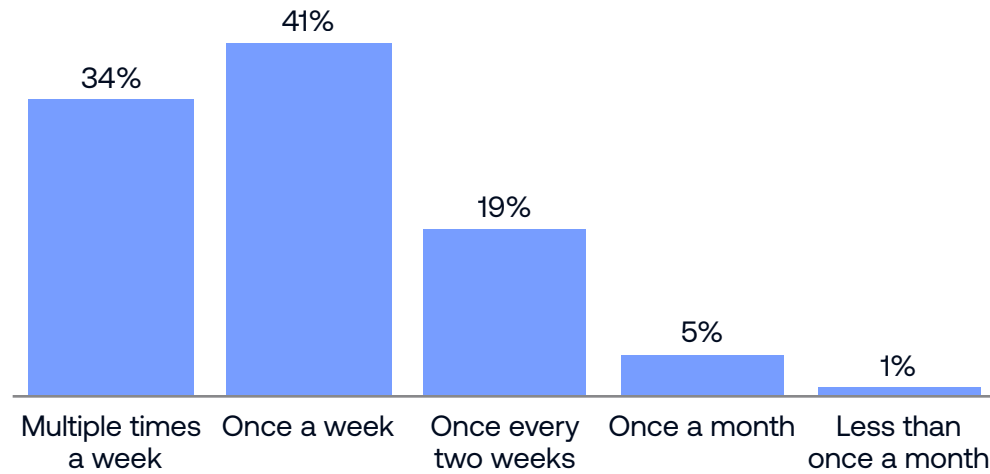
Split according to age



# Grocery shopping: once a week is enough

On average, how often do you usually go grocery shopping?

03 Grocery shopping behavior



- There are no big differences in grocery shopping frequency among age groups, but Boomers seem to go grocery shopping more often than other age groups.

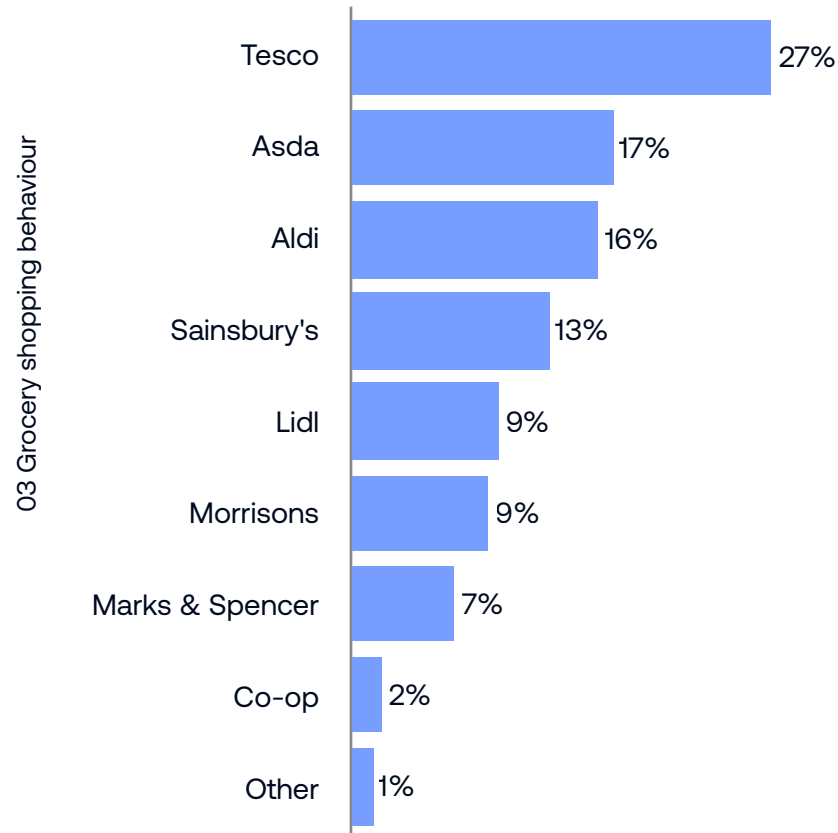
Thinking about your average shopping cart, how much do you spend when you go grocery shopping?



- Respondents aged between 35- and 44-years old seem the most like to spend more on grocery shopping.

# Tesco takes it all

Taking everything into account, which supermarket is your favourite?



Which supermarket best fits this aspect, when you think of.. ?

Long opening hours



40%

Great selection of brand products



31%

Great product variety



30%

Fair pricing



30%

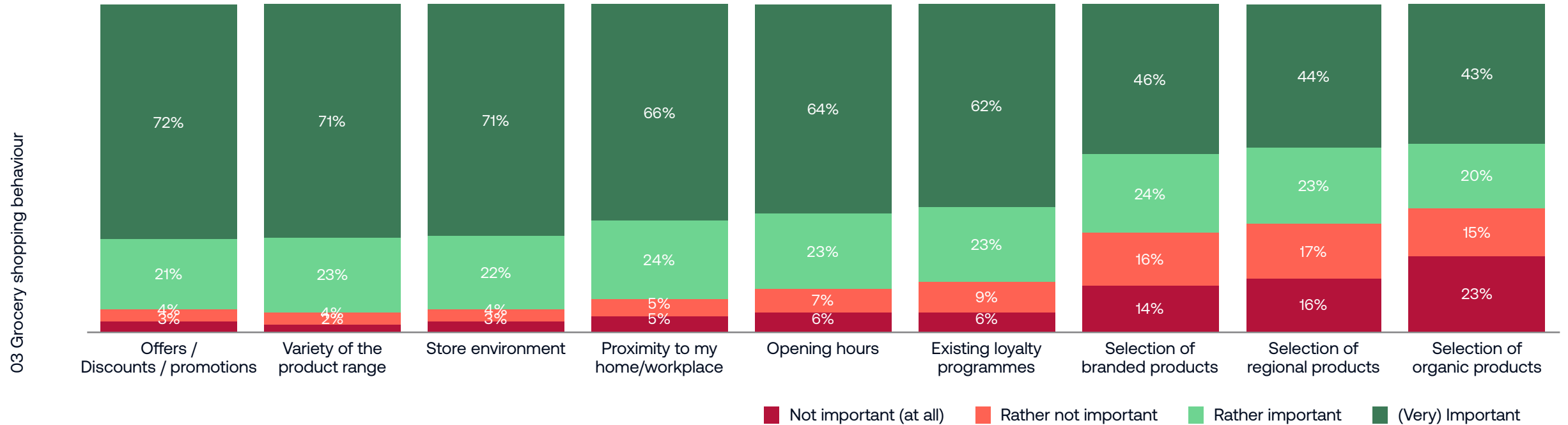
Great customer service



24%

# The cost-of-living crisis bites: offers, discounts & promotions are a must for Brits

How important are the following aspects in your choice of grocery stores?

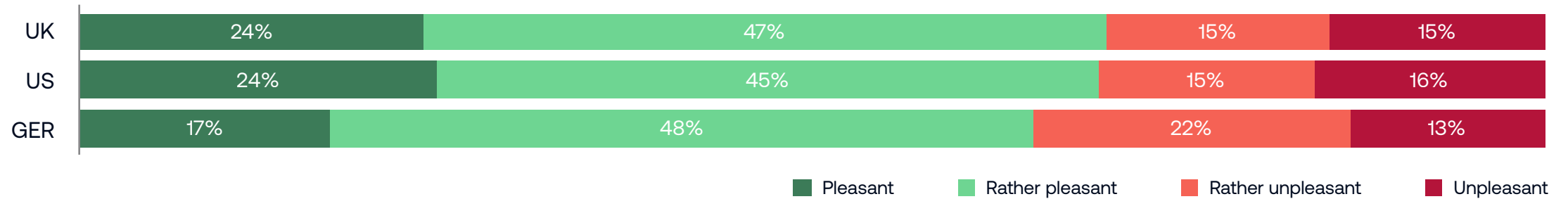


- Interestingly, **vegetarians** and **flexitarians** are more likely to consider the store environment as the most important aspect when choosing a grocery store, respectively at 81% and 74%.

- Those living in **mid-big cities** (100,001-500,000 inhabitants) are the most likely to value a wide range of products (82%), and offers, discounts and promotions (81%).

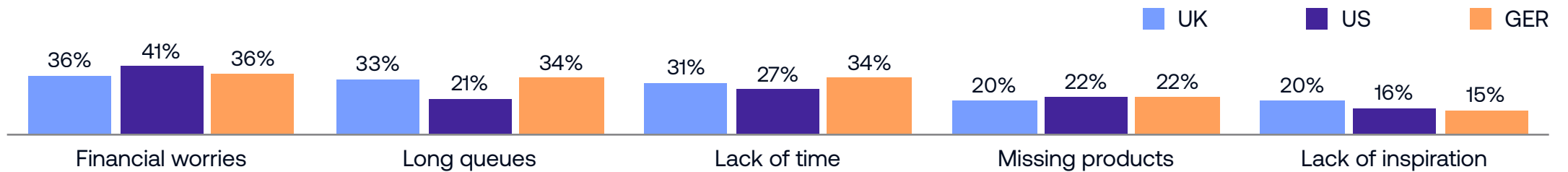
# Let's go abroad: Everybody is struggling with grocery expenses

“For me, grocery shopping is something...”



02 Food & Lifestyle

What are the main aspects that make grocery shopping unpleasant for you? (Multiple choice, Top 5)

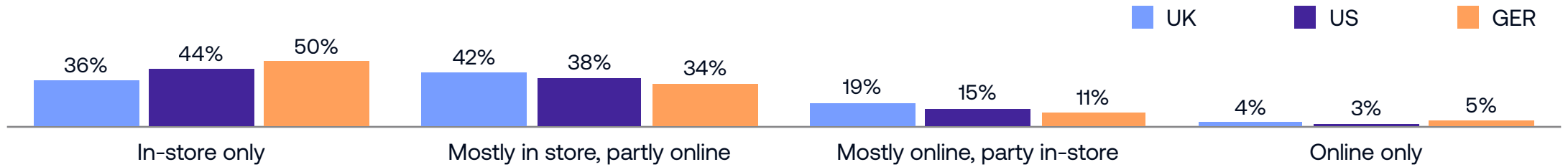


- **Brits** and **Americans** seem to find grocery shopping a pleasant experience (respectively at 71% and 67%).

- **Americans** are the most likely to be worried about the **grocery bill** (41%), while **Germans** worry about the **lack of time** (34%) as well as **long queues** (34%). Brits are concerned by the **lack of inspiration** (20%).

# Let's go abroad: Brits are the most likely to do their grocery shopping online

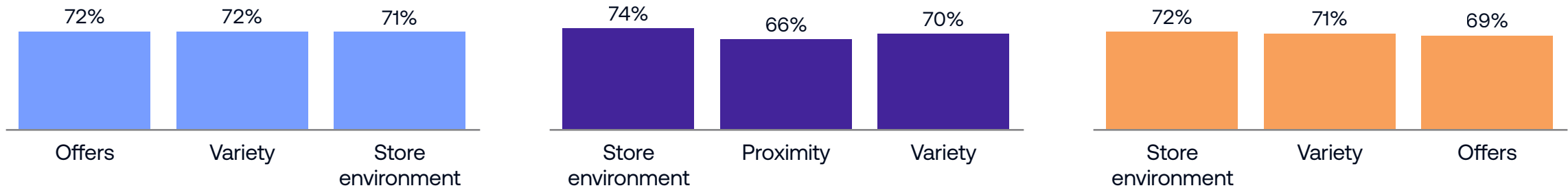
"In most cases, do you usually shop..."



02 Food & Lifestyle

How important are the following aspects in your choice of grocery stores?

(Top 3 by country, respondents that replied "Very important" and "Important")



- **Germans** are the most likely to keep shopping exclusively in store (50%), while **Brits** are the most likely to mix online and offline grocery shopping.

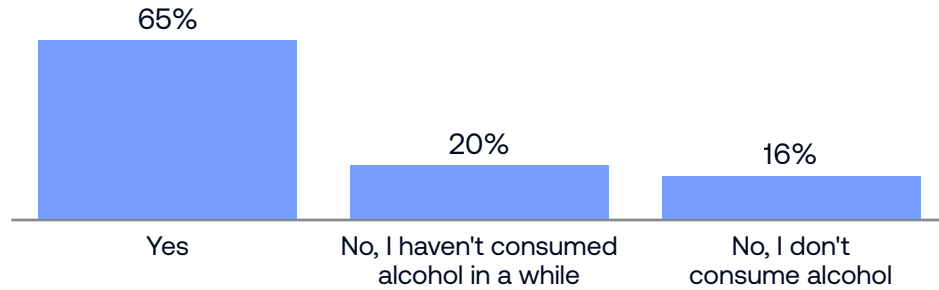
- **Americans** are the least impressed by offers & promotions and opening hours.

04

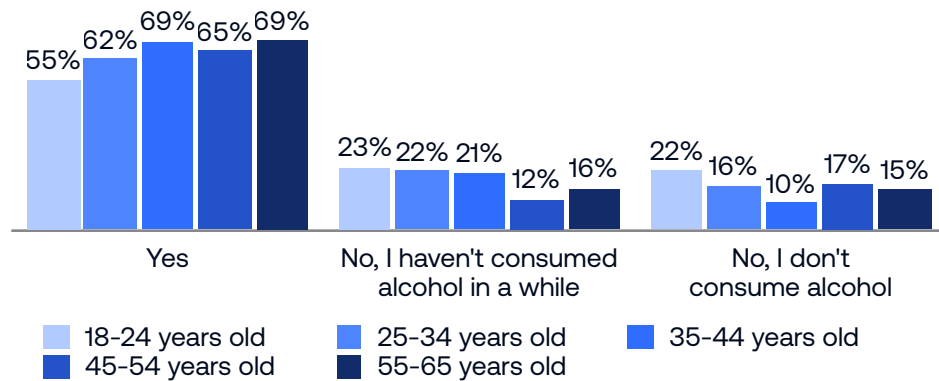
# In Focus: No & Low Alcohol Drinks

# If a pint is not available, a lemonade will do

Do you consume alcoholic beverages?

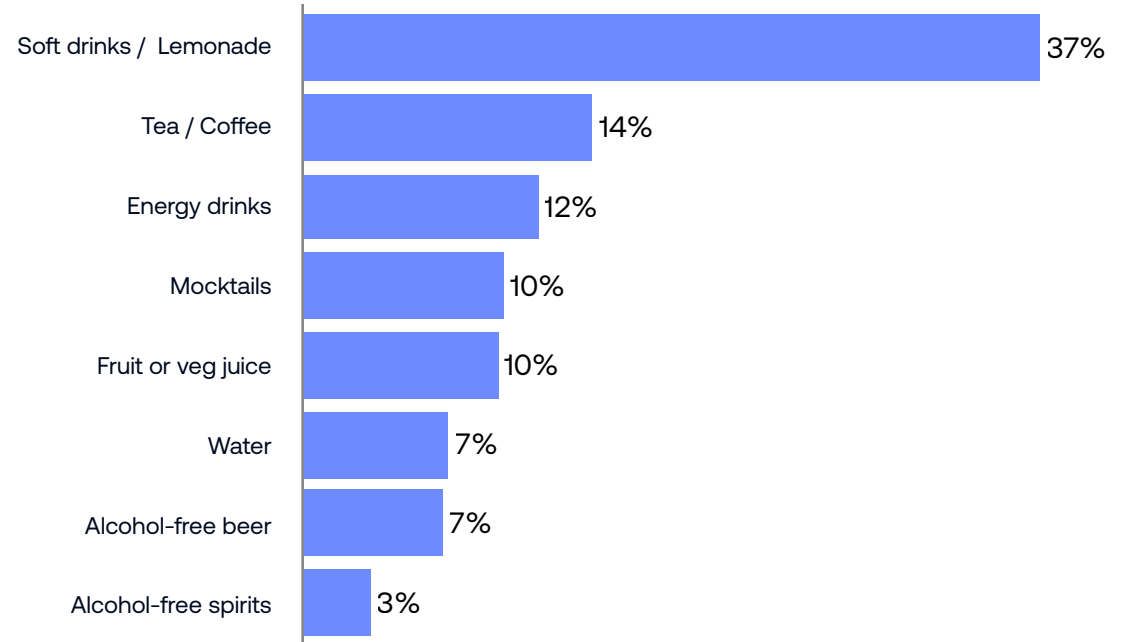


Split according to age



- **Women** are more likely to say they don't drink alcohol (20% vs. 12% of men).

You're at an event where there are no alcoholic drinks, which drink would go for? Please pick only one drink.



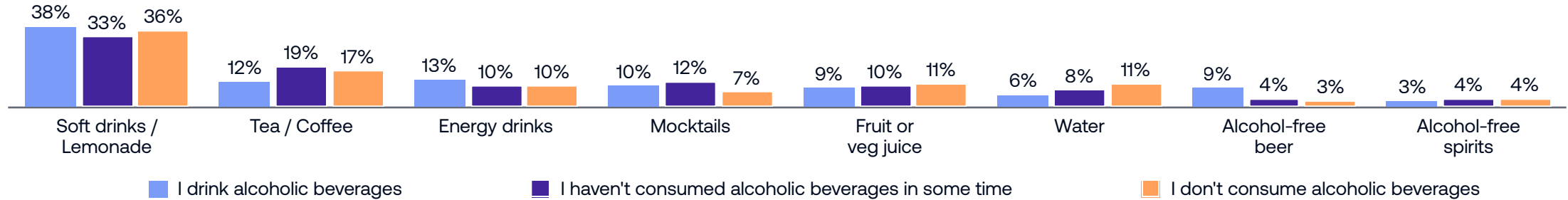
- **Women** are more like to choose soft drinks and mocktails (respectively at 42% and 13%), while men are more likely to pick energy drinks (17%).



# If a pint is not available, a lemonade will do

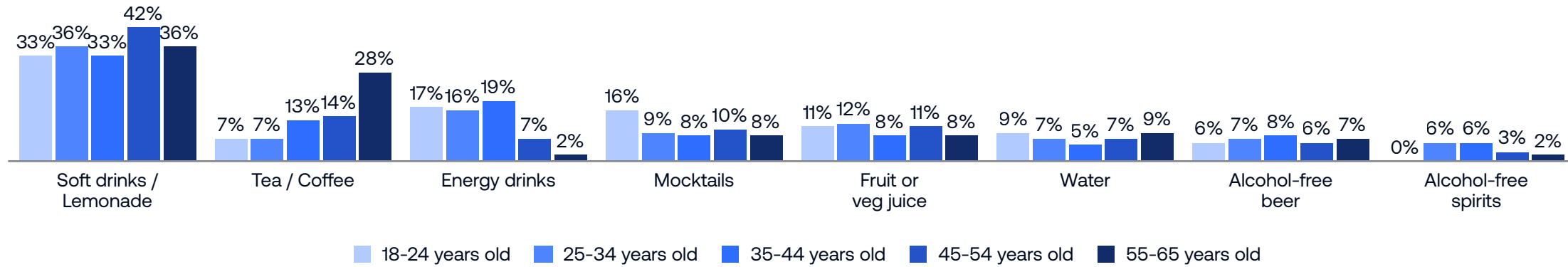
You're at an event where there are no alcoholic drinks, which drink would go for? Please pick only one drink.

Split according to drinking habits



04 NoLo Drinks

Split according to age



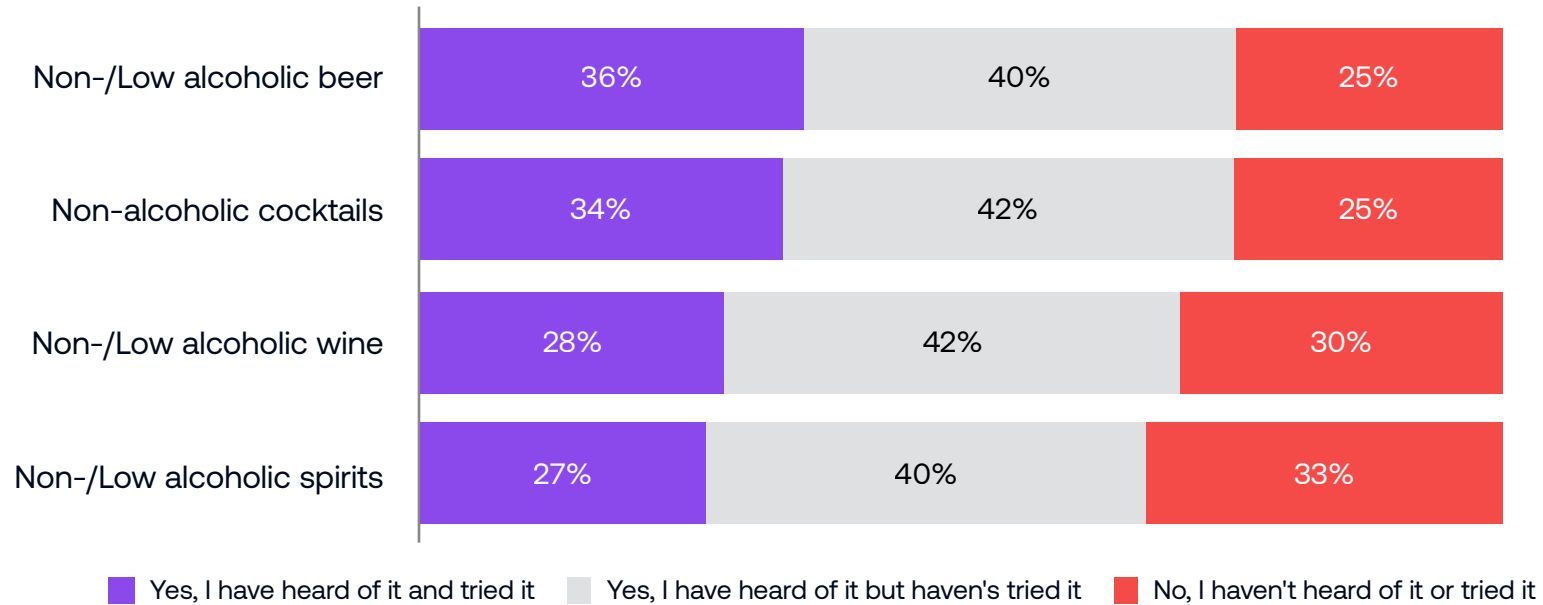
- It is interesting to note that those who haven't consumed alcohol in quite some time and those who don't drink at all wouldn't go for alcohol-free options (i.e. alcohol-free beer), but stick to other beverages altogether (e.g. soft drinks).

# NoLo beer: a pint is always a pint

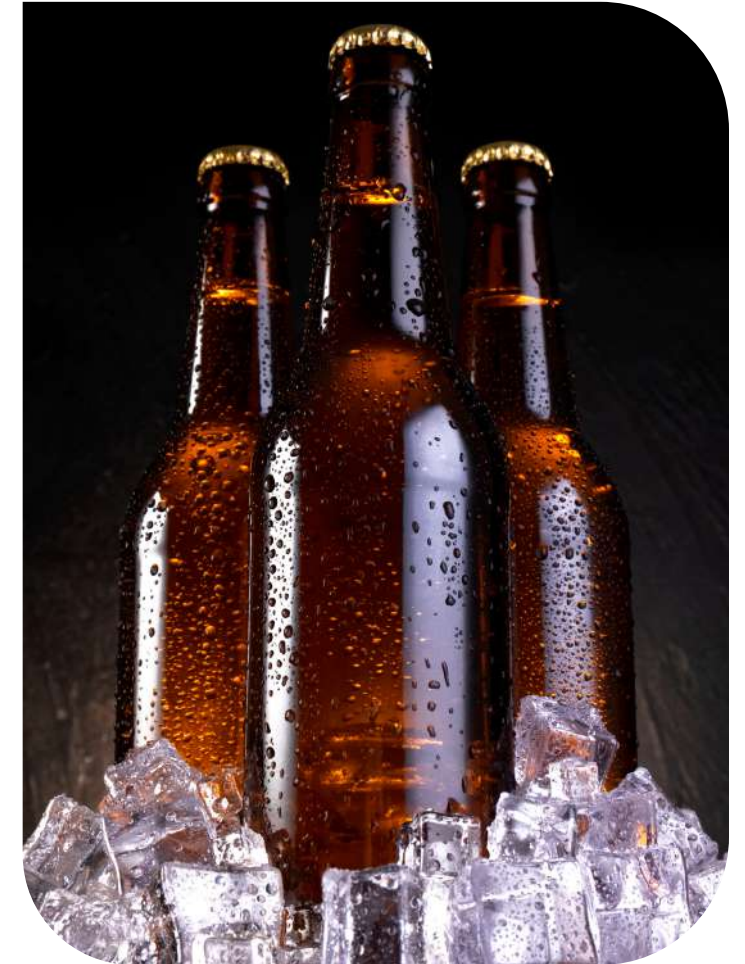


Did you know that NoLo beverages existed / have you tried them?

04 NoLo Drinks



- Respondents aged **35-44 years old** are the most likely to have tried the NoLo alternatives when compared to the other age groups.
- **Drinkers** are the most likely to know and have tried NoLo alternatives when compared to former drinkers and non drinkers.



# Non-alcoholic cocktails strike Brits' fancy

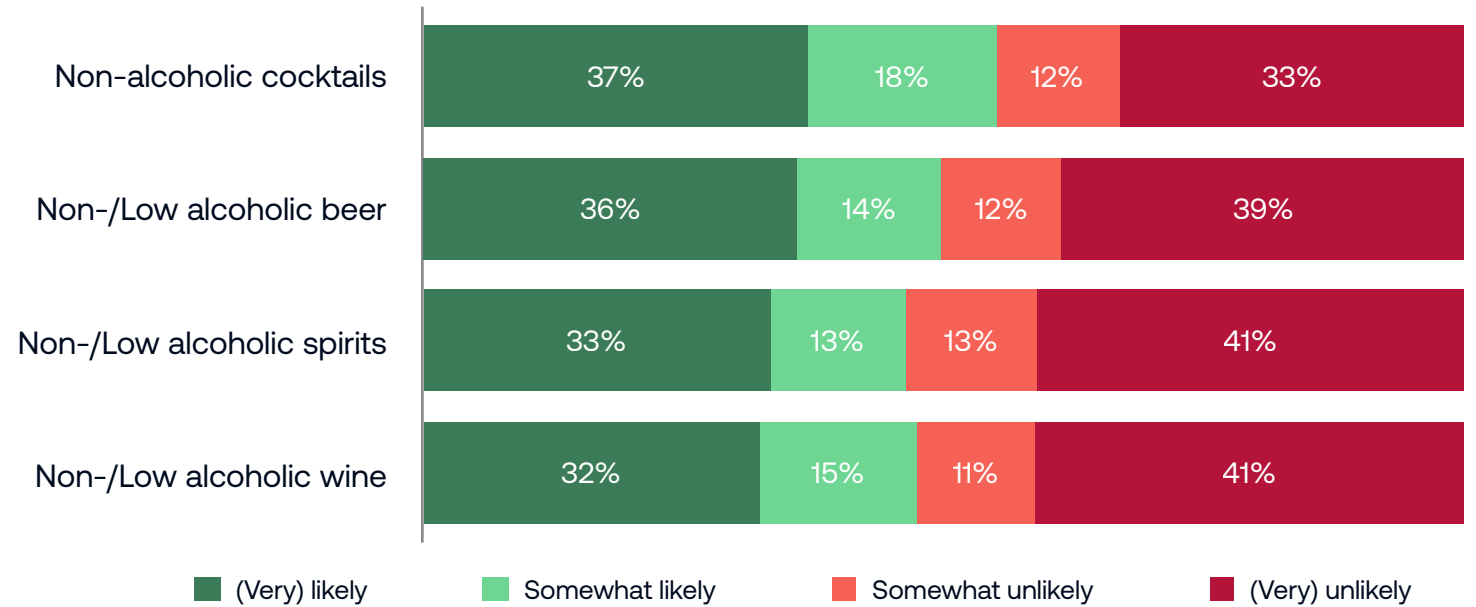
To interactive dashboard



04 NoLo Drinks



### How likely are you to buy the following?



- **Men** are more likely than women to be wanting to buy NoLo beer (41% vs. 31%) and NoLo wine (35% vs. 30%).
- Respondents between **25 and 44 years old** are the most likely to be open to buy NoLo alternatives.
- **Drinkers** seem the most likely to be buying NoLo alternatives when compared to former drinkers and non-drinkers.

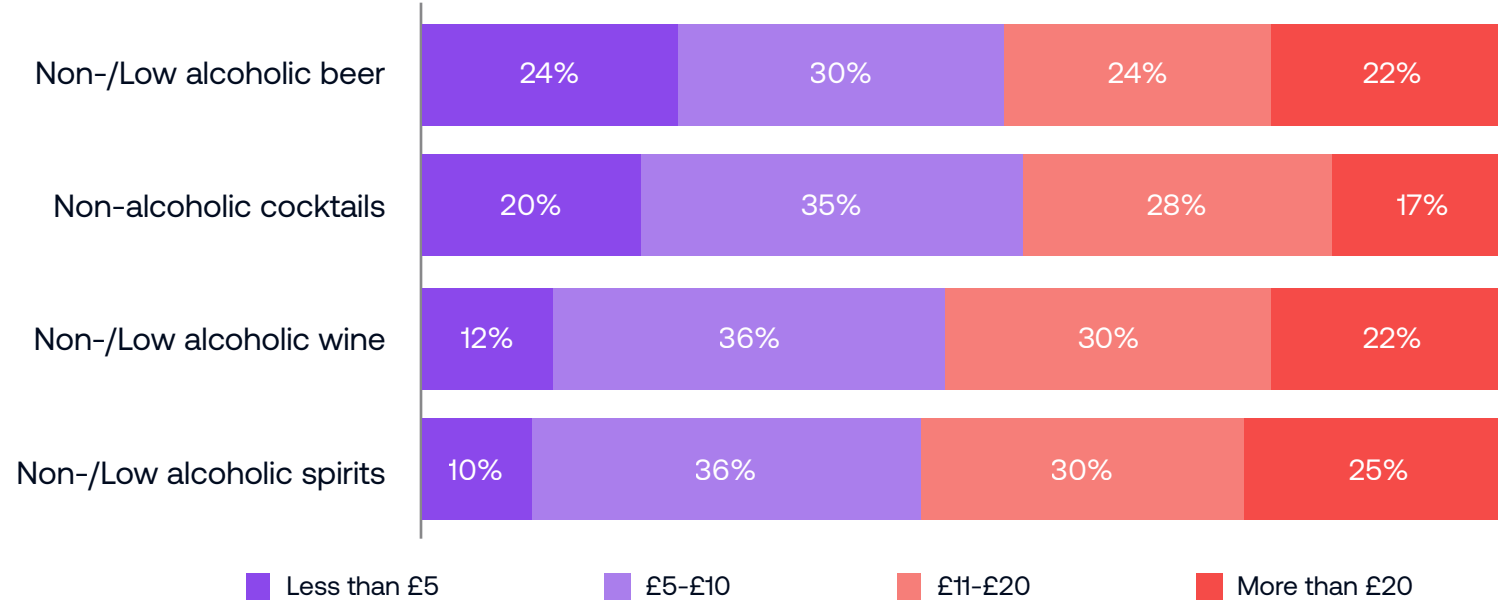
# Spending on NoLo drinks? Maybe on NoLo spirits



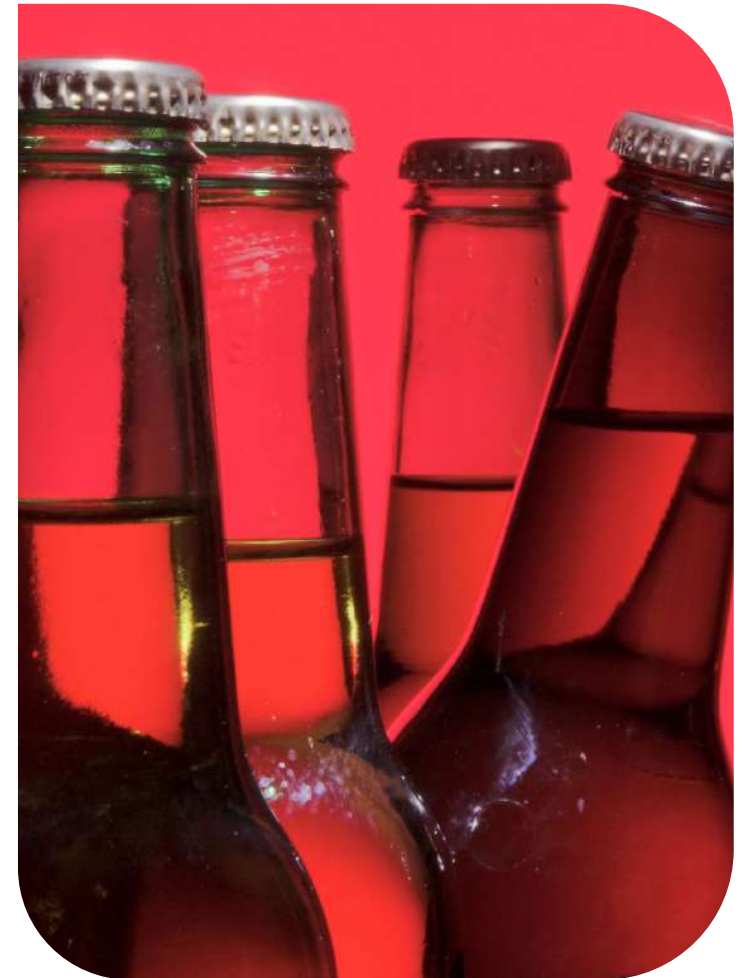
## How much would you be willing to spend on...

Respondents that are willing to buy NoLo alternatives

04 NoLo Drinks



- **Men** are more likely than women to be willing to spend more than £20 on all NoLo alternatives, especially NoLo spirits (31% vs. 18%).
- **35-44 years olds** are the most likely to be willing to spend more than £20 on NoLo alternatives.
- **Drinkers** seem the most likely to be willing to spend more than £20 on NoLo alternatives when compared to former drinkers and non-drinkers.



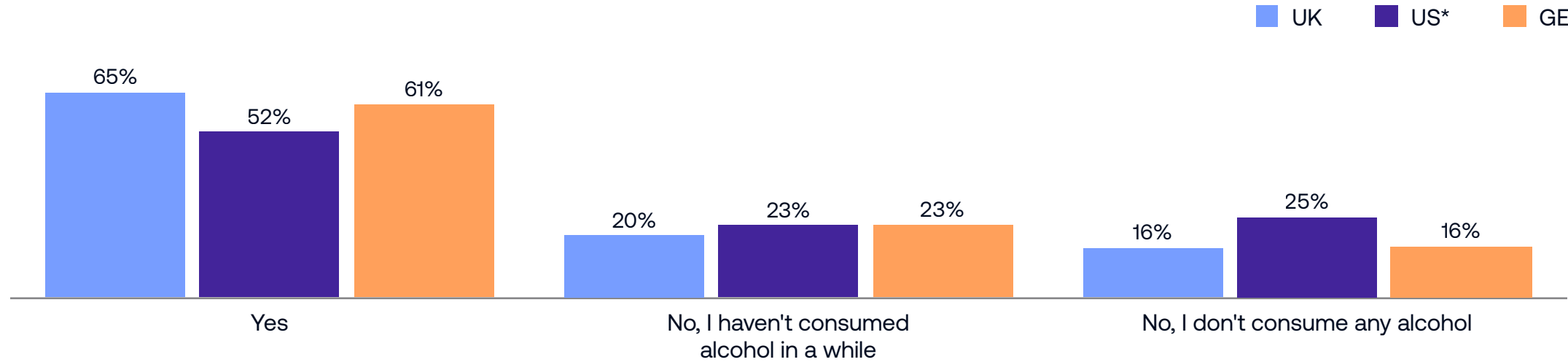
# Let's go abroad: Nearly one in two Americans are sober sipping

To interactive dashboard



Do you consume alcoholic beverages?

02 Food & Lifestyle



- Two thirds of Brits (65%) and nearly two thirds of German (61%) consume alcoholic beverages, while Americans have the highest percentage of non drinkers (25%).

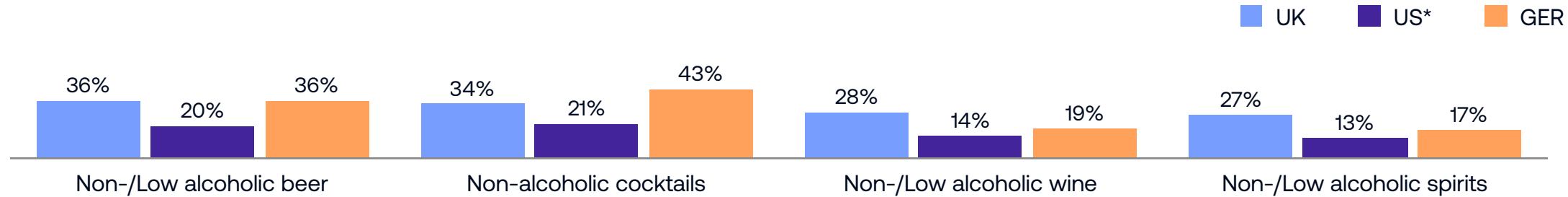
# Let's go abroad: Brits are the most sober curious

To interactive dashboard



## Did you know that NoLo beverages existed / have you tried them?

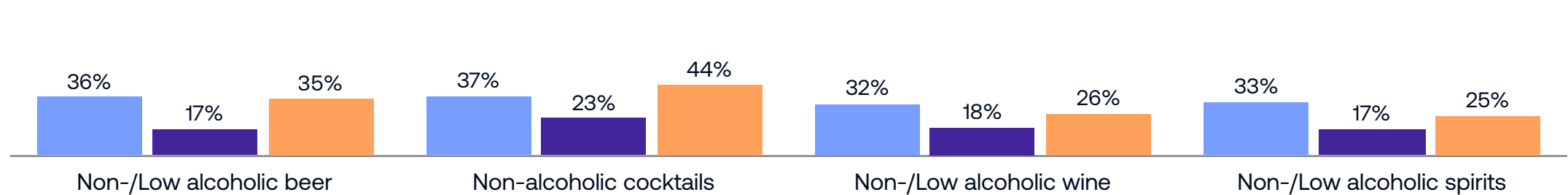
Respondents that are aware of NoLo alternative and have tried them



02 Food & Lifestyle

## How likely are you to buy the following?

Respondents that replied "Very willing" and "Willing"



- Brits seem seeking new experiences when it comes to NoLo alternatives and show high level of awareness and trials, while Americans don't seem sold on the idea. Germans instead seem to be

loving non-alcoholic cocktails, over two in five have tried them already (43%).

- **Germans** seem the most likely to buy non-alcoholic cocktails (44%), while **Brits** are the most likely to buy all the NoLo alternatives.

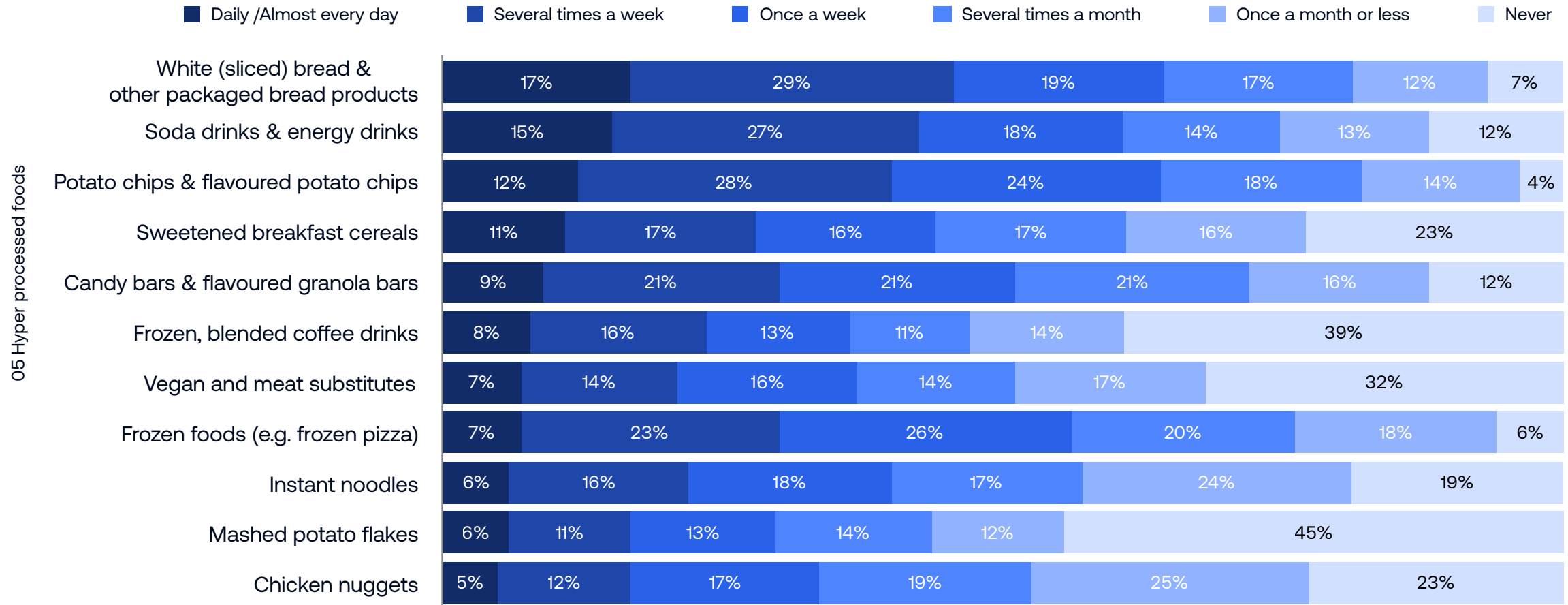
05

In Focus:

Hyper-processed Foods

# The best invention since sliced bread? Much more bread!

How often do you consume the following hyper-processed foods?



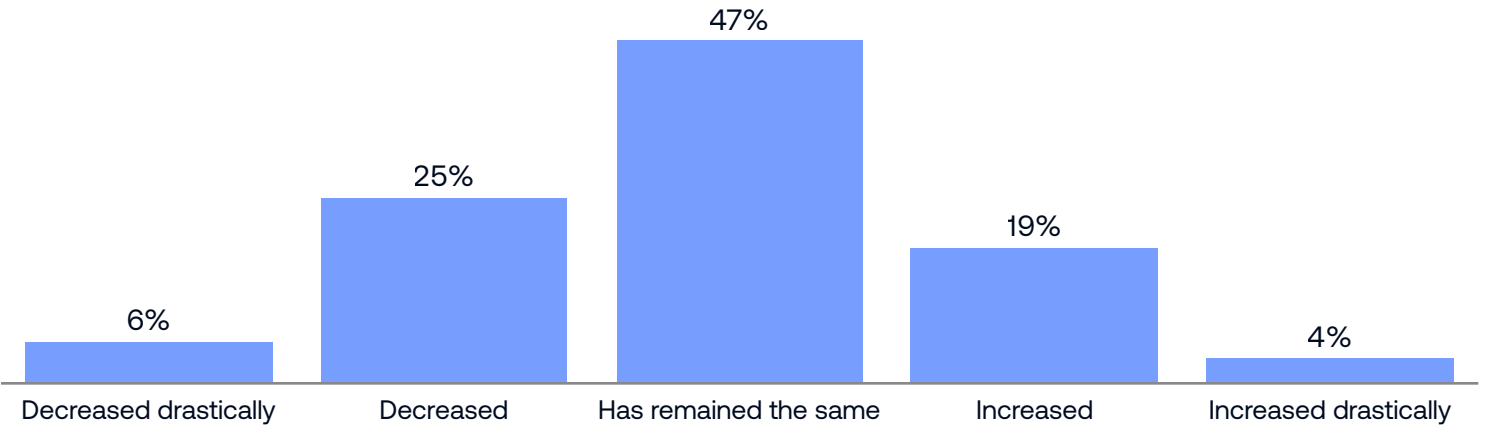


# Hyper processed foods: walking on a thin line

### How has your consumption of the hyper-processed foods changed over the last 6 months?

Respondents that eat hyper-processed foods at least rarely

05 Hyper processed foods



- **35-44 years olds** are the most likely to have increased their intake of hype processed foods (33%).
- **Pescatarians** and **vegetarians** seem the most likely to have increased their intake of their intake of hype processed foods, respectively at 46% and 42%.

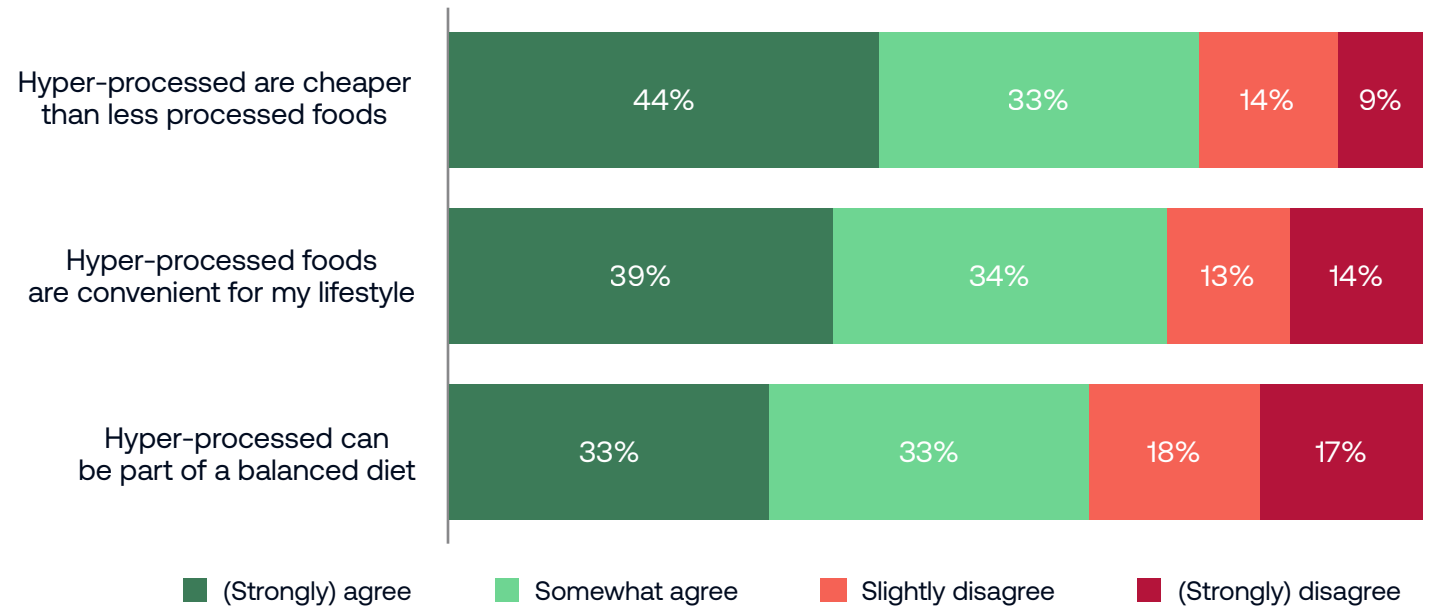


# Over two in five Brits think hyper-processed foods save them money

05 Hyper processed foods



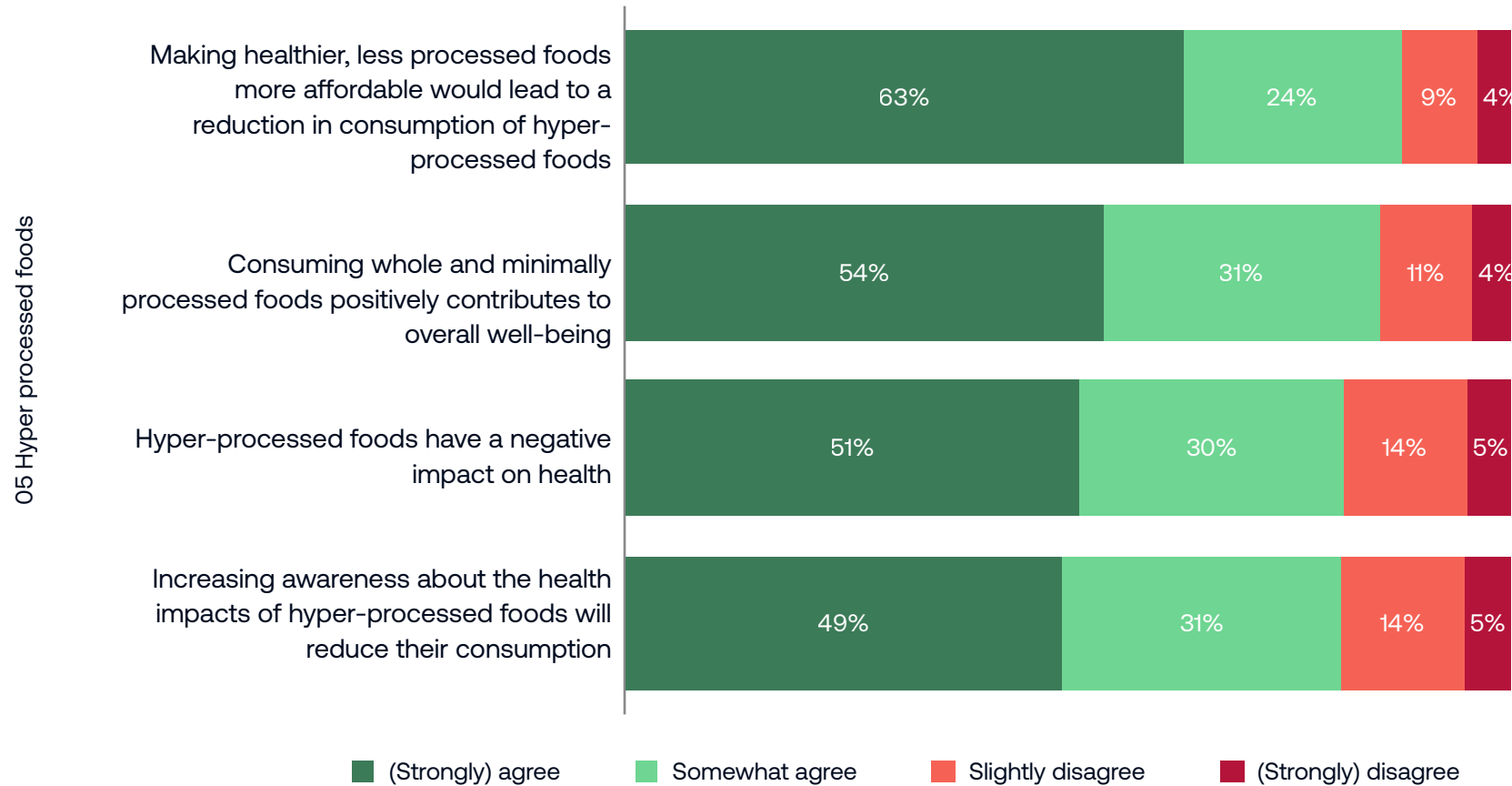
To what extent do you agree or disagree with the following statements?



- **Men** are more likely than women to agree that hyper processed foods are convenient for their lifestyle (42% vs. 36%) and can be part of a balanced diet (35% vs. 30%).
- **Millennials** are the most likely to agree that hyper processed foods are convenient (56%) and can be part of a balanced diet (47%).
- **Vegetarians** are the most likely to agree that hyper processed foods are convenient (60%) and can be part of a balanced diet (58%).

# Healthy a.k.a more expensive

To what extent do you agree or disagree with the following statements?



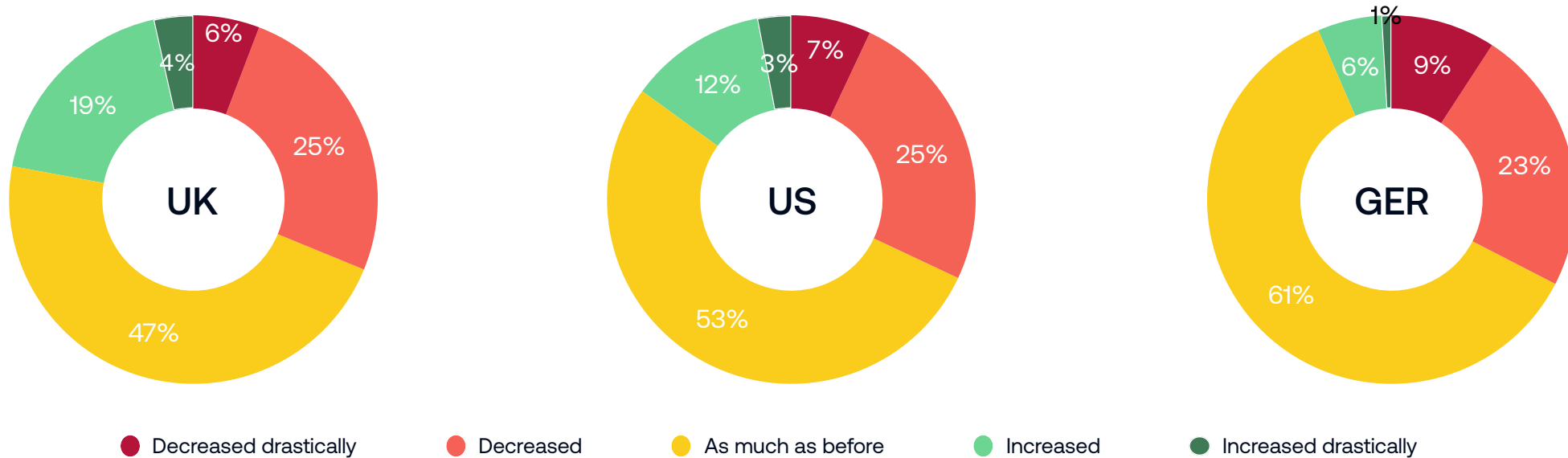
# Let's go abroad: Germans are cautious around hyper-processed foods

To interactive dashboard



How has your consumption of the hyper-processed foods changed over the last 6 months?

02 Food & Lifestyle



- **Sip, savour, repeat:** Sodas and energy drinks play a significant role in the diets of Americans (25%), Brits (15%), and Germans (10%).
- **Bread craze:** White bread and other packaged bread products maintain a stronghold in the diets of Brits (17%), Americans (15%), and Germans (6%).

- **Craving crunch:** Sweetened breakfast cereals make their mark as the third most preferred hyper-processed food item among Americans (12%) and Germans (5%), while for Brits potato chips lands third place (12%).
- All in all, when compared to UK and US respondents, Germans really pay attention to how often they eat hyper-processed foods.



# Let's go abroad: Are hyper-processed foods villains for everybody?




To interactive dashboard



To what extent do you agree or disagree with the following statements?

Respondents that replied "Strongly agree" and "Agree"

02 Food & Lifestyle

|   |  |  UK |  US |  GER |
|---|--|--|--|---|
| 1 | Making healthier, less processed foods more affordable would lead to a reduction in consumption of hyper-processed foods | 63%  | 57%  | 40%   |
| 2 | Consuming whole and minimally processed foods positively contributes to overall well-being                               | 54%  | 56%  | 40%   |
| 3 | Hyper-processed foods have a negative impact on health   | 51%  | 49%  | 39%   |
| 4 | Increasing awareness about the health impacts of hyper-processed foods will reduce their consumption                     | 49%  | 38%  | 41%   |
| 5 | Hyper-processed are cheaper than less processed foods  | 44%  | 39%  | 26%   |
| 6 | Hyper-processed foods are convenient for my lifestyle  | 39%  | 37%  | 25%   |
| 7 | Hyper-processed can be part of a balanced diet   | 33%  | 22%  | 19%   |

- There is general consensus among respondents from the UK, US and Germany: making healthier food more affordable would reduce the consumption of hyper-processed foods.

- **Brits** seem the ones most vocal about hyper-processed foods, very likely because higher prices for sugary drinks or unhealthy foods are a regularly discussed in politics and media. Germans seem generally skeptical about all statements.

06

# Study Design & Sample

appinio

# Study design & sample

## Method

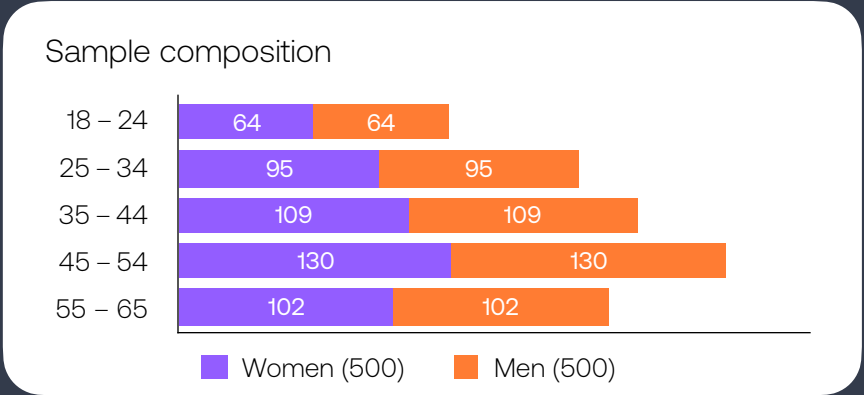
- Mobile questionnaire administered via the Appinio app
- The survey took place from June, 20th to June 29th, 2023
- Data can always be viewed at [research.appinio.com](https://research.appinio.com)

## Sample

Survey country  
**United Kingdom**

**1000** Participants      **41.5** Average age

Nationally representative – quoted by age & gender based on the 2011 census.



# Get in Touch

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