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The conscious consumer

Connecting with health and sustainability priorities

Deloitte commissioned a consumer survey about health and sustainability in grocery shopping in 15 European countries, across more than 17,000 consumers. This research aims to offer insights on consumer perspectives and the balancing act they face between health, sustainability and price when making food purchases.

Contents

Foreword

The growing importance of health and sustainability in consumer food buying behaviour

The food system is facing a new era in which health and sustainability are becoming increasingly important shopping criteria. Over the course of just one year, buying and consumption behaviour in Europe has changed to cater to a diet with more fruit, more vegetables and less meat.

64% of the respondents in our survey indicated that over the past 12 months they have become more interested in learning more about the influence of food on their health. 79% of respondents seek information on healthy living. Health is clearly increasingly becoming a stronger buying consideration when shopping for food.

As in other areas outside the food sphere, the internet and social media are taking up an increasingly important role in not only providing this health information, but, according to the respondents, these channels are also becoming more trusted in their output. Doctors and experts are still seen as the most trustworthy, but the internet and social media can provide an – albeit intentionally searched for, almost 'self-diagnosed' – personalized aspect to information about health. Less trustworthy, according to the respondents, are the grocers. Only 4% of EU shoppers perceive grocers as a trusted source of information about health and sustainability.

Our survey compared health, sustainability and price as motivators in buying behaviour across European countries and population groups. Price, in the end, is the ultimate parameter that dictates where people are prepared to 'invest'. This makes one of the survey's insights particularly interesting – when consumers have to choose, an average of 60% chose health over affordability. That number is even higher in Spain and Italy, where 80%+ rank health considerations as more important than affordability.

What about sustainability? Although sustainability is not rated as highly as health in terms of importance when compared to price – only 29% will choose sustainability over affordability – it is striking that 70%+ claims to be willing to accept a price that is 5% higher or more for foods that are sustainably sourced!

Of course differences are visible when we zoom in on specific population segments. In terms of health, an above-average interest is particularly noticeable among women, young people, people with a higher education level and/or a higher income. More effort is made to eat locally-produced food, to eat more vegetables and more fruit and to consume less meat and less alcohol. Respondents with higher incomes and, to a slightly lesser extent, respondents with a higher education level are more likely to choose sustainability over affordability when buying food.

We also see different opinions towards health and sustainability appear across the various European countries. Overall, the countries that deem health an important consideration in buying preferences say the same for sustainability. This holds for the Southern European region and specifically the Mediterranean countries (Portugal, Spain, Italy), whereas in the Northern European countries, especially the Nordics, less importance is attached to health and sustainability. In Southern Europe, the change in consumption behaviour – a move towards more fruit and vegetables, less meat and alcohol – has also been larger than in the Nordics.

But the overall trend is very clear. Health and sustainability matter more and more when it comes to grocery shopping. And consumers are increasingly expecting action from grocers and regulators in this regard. Over 40% think that both unhealthy and unsustainable food should be taxed higher. This is even more so the case for seniors, with around 50% believing unhealthy and unsustainable food should be taxed higher and about 60% indicating that, as is the case for cigarettes, it should be made clear on labels which foods are unhealthy and unsustainable.

Now to the role of grocers in this trend dynamic. Over 53% of the respondents in our survey would like to see grocers stepping up their role in educating consumers. And there's a lot of ground to be won in that regard. 17% of respondents use grocery stores (among others) as a source of healthy living information, but only 4% deem grocers to be the most reliable place to get health information. Given the role that grocers play in providing access to what we feed ourselves and our loved, there is a tremendous opportunity for grocers to step up and play and even more impactful role. As with life in general, however, actions speak louder than words.

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64% of the respondents indicated that over the past 12 months they have become more interested in learning more about the influence of food on their health.

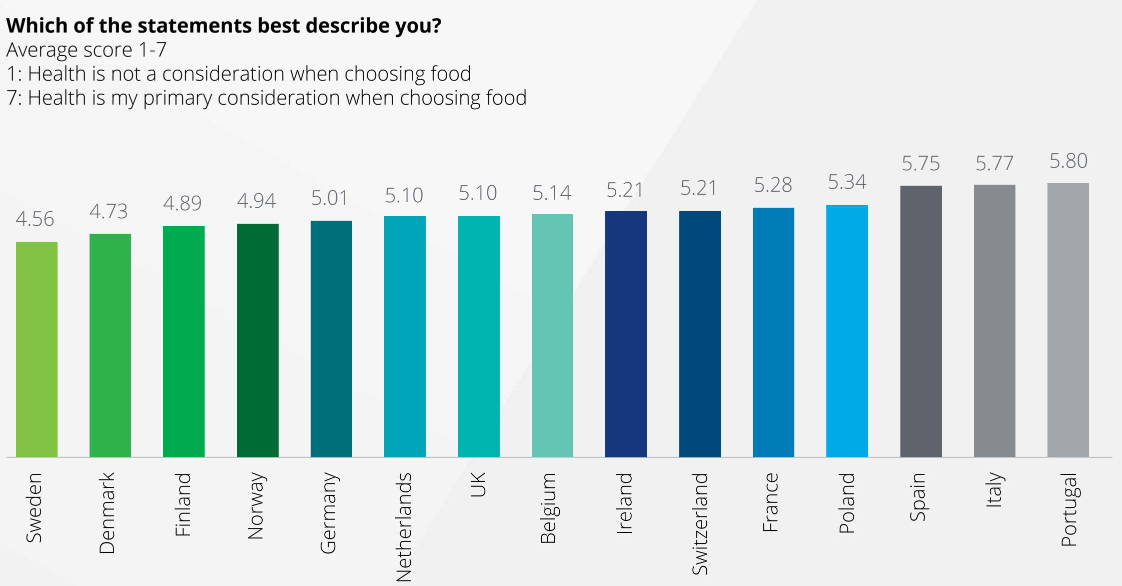
1. Introduction

Understanding consumer needs has always been a key focus for grocers. But with the amount of data available today, and the insights that provides, there are increasing opportunities for grocers to cater to these preferences. As described in Deloitte's Consumer Love publications, https://publications.deloitte.nl/consumer-love/consumer-love/ retailers, among others, are all competing for the "most meaningful role" in the lives of consumers.

This research shows us that health and sustainability considerations play an increasingly important role when shopping for food. One major result from our survey, for example, is that consumers are becoming increasingly aware of the relation between food and health and that over the course of just one year, buying and consumption behaviour in Europe has changed to a diet with more fruit, more vegetables and less meat. So consumers are changing their behaviour according to their convictions.

We asked consumers whether health was a consideration when buying food. Respondents could choose a range from 1 (health is not a consideration when choosing food) to 7 (health is my primary consideration when choosing food). On average, respondents scored health fairly high (5.19). When looking at the results at a country level, it is particularly noticeable that in the Mediterranean/Southern European countries such as Portugal (5.80), Italy (5.77) and Spain (5.75), health is a relatively more important consideration when buying food compared to the Nordic/Northern European countries. In countries such as Sweden (4.56), Denmark (4.73) and Finland (4.89), health is a relatively less important consideration, but still ranks highly, at more than 4.5 out of 7 on average.

Fig. 1: Consideration of health

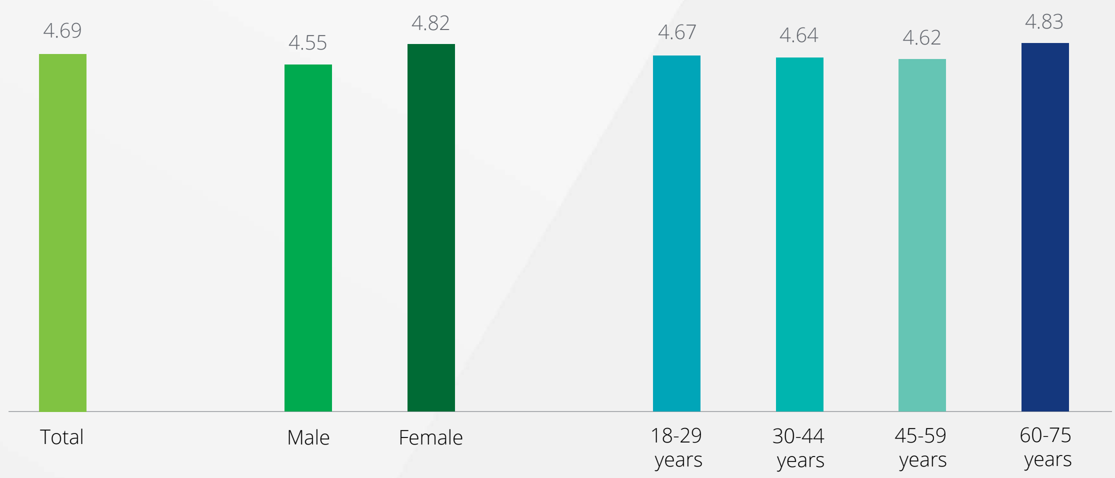


The research also reveals that consumers consider sustainability when buying their food. When asked whether sustainability is a consideration when choosing food, respondents again chose on a scale from 1 (sustainability is not a consideration when choosing food) to 7 (sustainability is my primary consideration when choosing food). With an average total score of 4.69 in response to this question, we see that, although sustainability is important, consumers see health and price as bigger deciding factors in their purchasing decisions. But the European countries are again divided in their responses. As with their view on health, here we also see that the Mediterranean countries consider sustainability more important than the Nordics.

Yet, with all this talk of health and sustainability being forefront of mind, the price paid for groceries remains an important factor. We asked respondents how important price is when deciding to purchase food? Three out of four respondents stated it was an (extremely) important consideration when buying food. In the results per country, the aspect of price when buying food is relatively more important in Portugal (5.72), Ireland (5.43), the UK (5.40) and Spain (5.39) when compared to the other countries. In countries such as Germany (4.97), Switzerland (4.98) and Italy (5.09), price is a relatively less important aspect when buying food but still quite high at around 5. With the importance of price apparent from the research, it is striking that when asked what types of foods respondents would be prepared to pay more for, over 70% claimed to be willing to accept a higher price (5% or more) for foods that are sustainably sourced.

Fig. 2: Consideration of sustainability

Which of the statements best describe you?
Average score 1-7
1: Sustainability is not a consideration when choosing food
7: Sustainability is my primary consideration when choosing food



2. The European perception of health

The research explored consumer behaviour across Europe and asked respondents to comment on whether 13 statements were true or not in regard to their behaviour over the past 12 months. The percentages of people answering 'yes' to a statement are shown in figure 3 below.

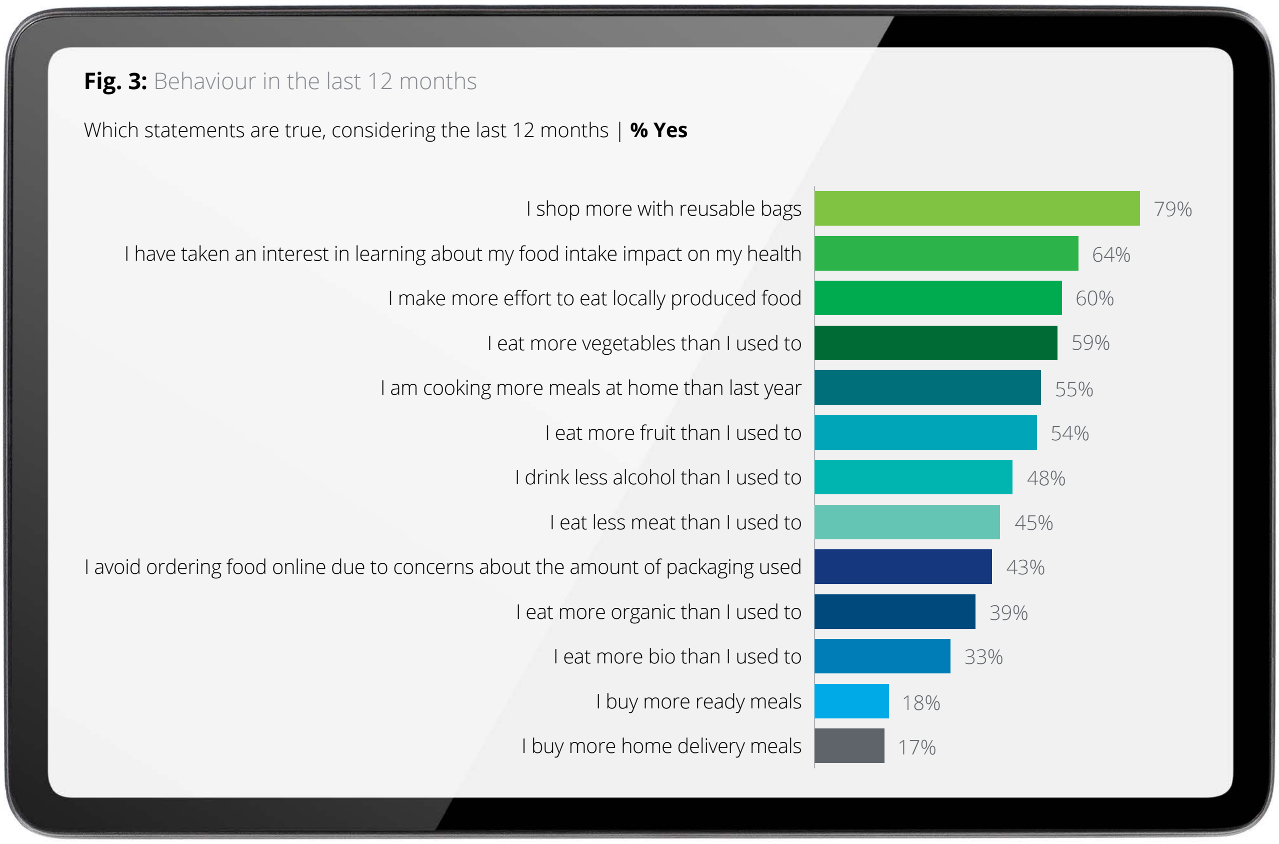


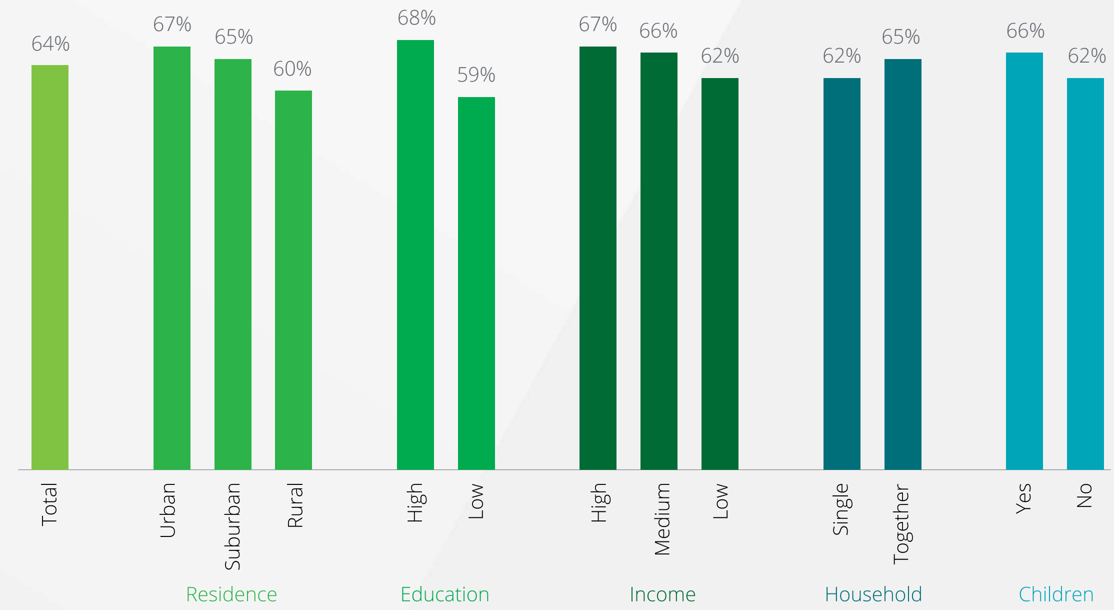
Fig. 3: Behaviour in the last 12 months

Learning about the influence of food on health

Consumers in Europe are clearly increasingly interested to learn about the impact of food intake on their health - 64% of respondents indicate that over the past 12 months they have become more interested in learning more about the influence of food on their health. An above-average interest is particularly noticeable among women, young people, people with a higher education level and/or a higher income. Households with children also show an above-average interest over the past 12 months in terms of knowledge about food and health. Respondents in urban and suburban areas have become slightly more interested in the influence of food on their health than respondents in rural areas.

Fig. 4: Behaviour: Interest in food impact

Statement: I have taken an interest in learning about my food intake impact on my health | **% Yes**

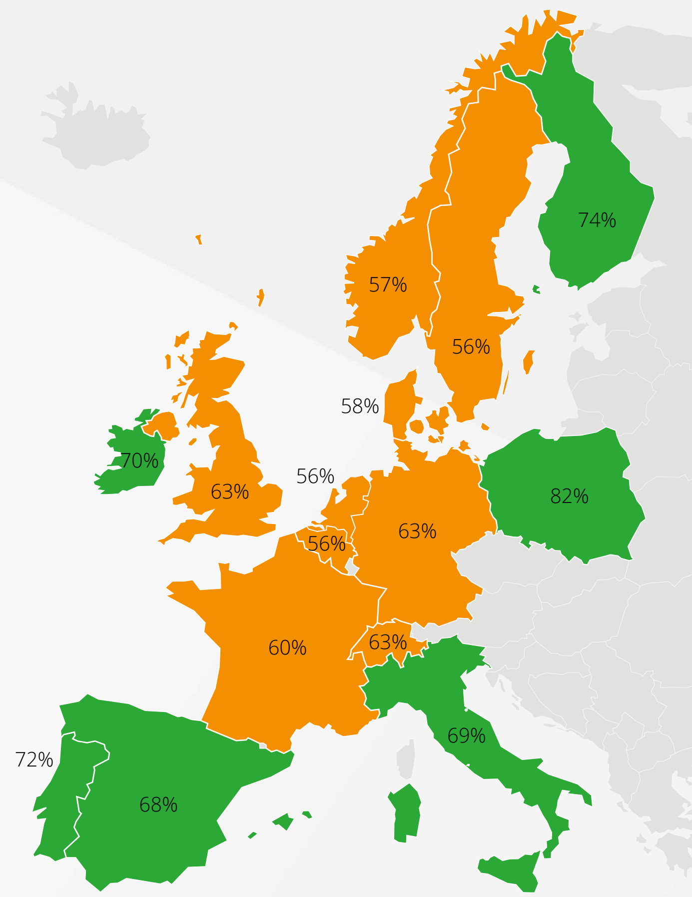


Countries such as Poland (82%), Finland (74%) and Portugal (72%) show an above-average interest in gaining knowledge about the influence of food on health. Countries like Belgium (56%), the Netherlands (56%), Sweden (56%) and Norway (57%) are slightly below average.

The results above somewhat correspond to the buying preferences of respondents in these countries. For example, for Portugal it is not only an interest in gaining knowledge about the influence of food on health, but this also relates into health increasingly becoming an important buying influencer, with Portuguese respondents giving health an average of 5.8 out of 7 when asked if health is an important buying consideration. On the other hand, Finland also shows an above-average interest in gaining knowledge, but there this doesn't translate into health being as big a big motivator behind buying food (average score of 4.89 out of 7).

Fig. 5: Behaviour: Interest in food impact

Statement: I have taken an interest in learning about my food intake impact on my health | **% Yes**



Countries such as **Poland (82%), Finland (74%) and Portugal (72%)** show an above-average interest in gaining knowledge about the influence of food on health.

Eating more fruit and vegetables
Respondents not only said they were interested in the impact of food on their health, but an average of 54% actually increased their fruit intake in the last 12 months. In general, in countries where health is deemed an important consideration in buying food, we see some of the largest changes in food consumption and behaviour. This was especially the case in Poland, for example, with 74% of people indicating that they eat more fruit than they used to. Respondents in Portugal (67%), and Spain (64%) also increased their fruit intake to above average when asked about the past 12 months; whereas in Denmark (40%) and Norway (44%) – where health is also not considered as important in buying food – this increase is the lowest of the countries surveyed.

The same was seen when the survey asked people whether they eat more vegetables than they used to. An average of 59% of people said that they did indeed eat more vegetables, with again Poland at the top with a huge number of 77%. Portugal (68%), Spain (65%) and the UK (65%) also started to eat more vegetables. In countries such as Germany (49%), Switzerland (49%), Denmark (52%) and Finland (54%), the increase in eating vegetables was the lowest.

It is not possible to derive from the research findings whether these relative variations in increases are caused by local regulations and/or whether the variations in starting points cause the relative increase variations.

Fig. 6: Behaviour: Eating more fruit

Statement: I eat more fruit than I used to | **% Yes**

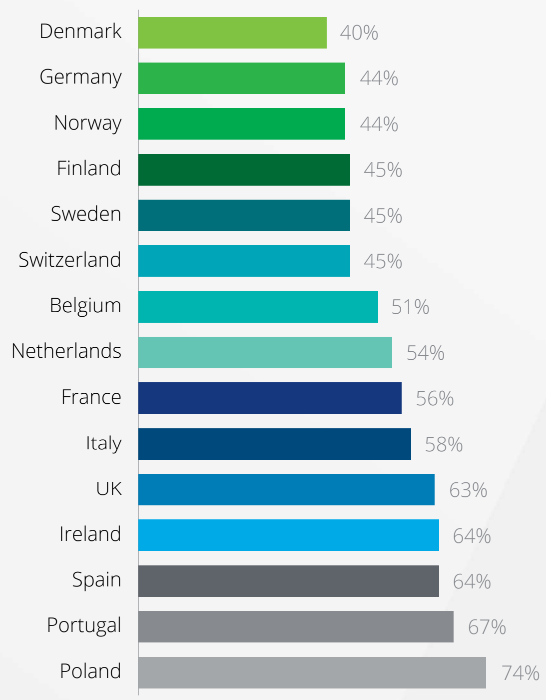
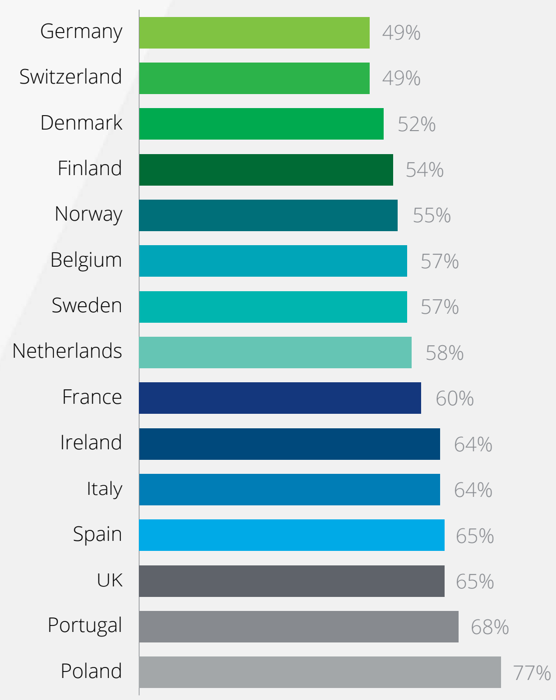


Fig. 7: Behaviour: Eating more vegetables

Statement: I eat more vegetables than I used to | **% Yes**



The move to organic
An average of 39% stated that they eat more organic than before, a lower number than indicated they eat more fruit and vegetables. We see organic mostly on the increase in specific segments. In this case, younger people, those with a higher income and especially respondents in countries such as France (64%), Portugal (51%) and Poland (50%) have, on average, increased their consumption of organic foods the most over the last 12 months in comparison to their behaviour before.

What about meat and alcohol consumption?
The increased focus on health has led consumers to change some of their behaviour accordingly (e.g. eating more fruit and vegetables). But what about alcohol and meat consumption? We asked respondents whether they ate less meat in the past 12 months than they used to before. 45% of consumers do indeed eat less meat. The percentage of respondents who eat less meat is highest in Belgium (51%), Italy(51%), Portugal (51%), France (50%) and the Netherlands (50%). Countries such as Norway (33%), Denmark (38%), Finland (38%) and Sweden (40%) have the lowest percentage of respondents who have decreased their meat intake. It is probable that this probably correlates to baseline diets, with the Scandinavian countries eating less meat to start with.

It's pretty much the same story for alcohol. 48% of respondents said they drank less alcohol in the previous 12 months than in the period before that. This change in behaviour is likely driven by the lockdown measures and reduced social interaction during the corona pandemic. It is notable that respondents in countries like Poland (59%), Ireland (55%), Spain (55%), Portugal (54%) and the UK (53%) have reduced their alcohol consumption the most. For countries such as Switzerland (38%), Denmark (41%) and Germany (41%) this relatively was the lowest.

Fig. 8: Behaviour: Eating less meat

Statement: I eat less meat than I used to | **% Yes**

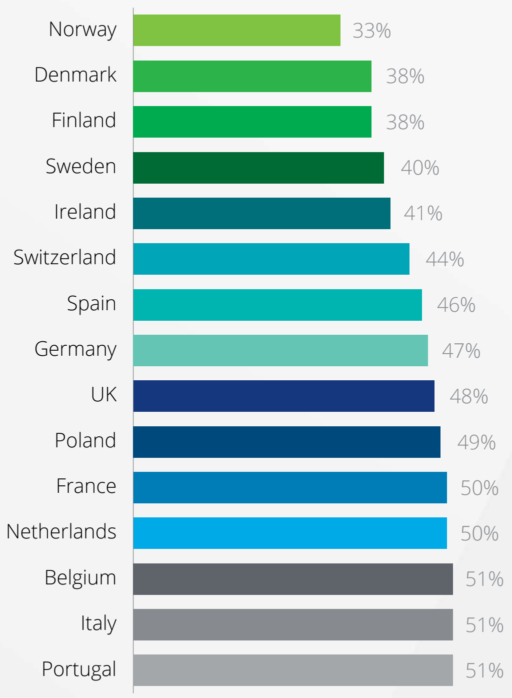
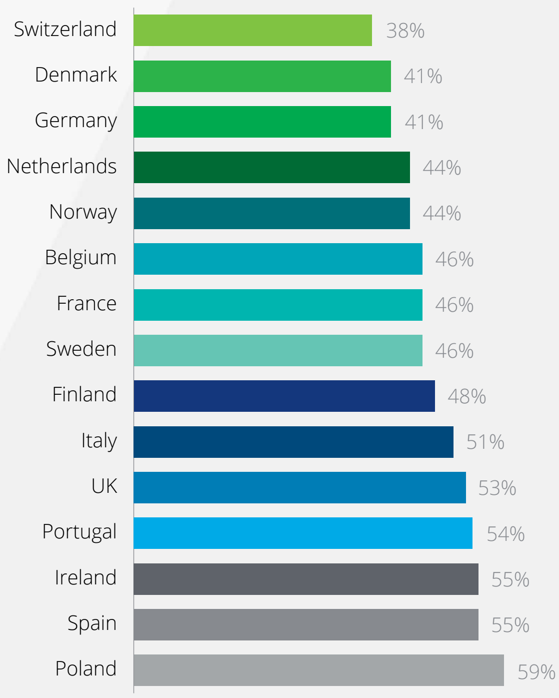


Fig. 9: Behaviour: Drinking less alcohol

Statement: I drink less alcohol than I used to | **% Yes**



3. How does sustainability impact food buying decisions

As outlined before, our research highlighted health as an important factor for European consumers. Sustainability is another, albeit less important, factor for consumers when grocery shopping. Awareness of sustainability manifests itself in consumer behaviour in different ways. For example in the use of reusable bags or being aware of, and avoiding, too much (plastic) waste and packaging, and the use of local products. Similar to what we saw with the health considerations, here we also see that, in countries where sustainability is deemed an important consideration in buying food, larger changes in consumer behaviour are noticeable than in countries where it is deemed less important. This means a higher proportion of people are not only talking the talk.

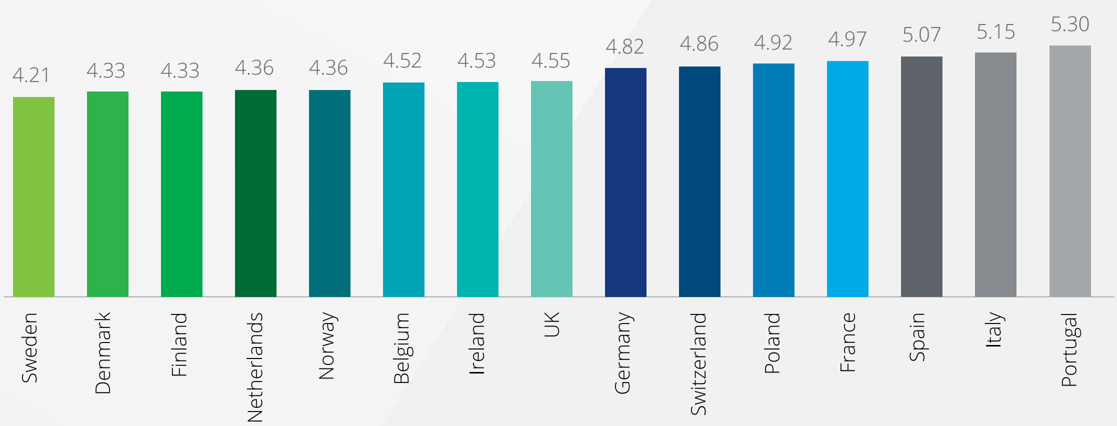
When asked whether sustainability is a consideration when choosing food, respondents chose on a scale from 1 (sustainability is not a consideration when choosing food) to 7 (sustainability is my primary consideration when choosing food). The average score was 4.69.

When looking at the results per country, it is notable that sustainability is a relatively more important consideration when choosing food among respondents in the more southern European countries of Portugal (5.30), Italy (5.15) and France (4.97). In countries such as Sweden (4.21), Denmark (4.33), Finland (4.33), the Netherlands (4.36) and Norway (4.36), respondents attach relatively less importance to sustainability when choosing food.

On average, women more often indicate that sustainability is a more important consideration in their choice of food than men do, and for respondents living in cities, sustainability is a relatively more important consideration than for respondents living in the suburbs or in rural areas. Higher educated people, households in which people live with a partner and households with children also attach relatively more importance to the aspect of sustainability when choosing food.

Fig. 10: Consideration of sustainability

Which of the statements best describe you?
Average score 1-7
1: Sustainability is not a consideration when choosing food
7: Sustainability is my primary consideration when choosing food



79% of the respondents indicate that they have increased their use of reusable bags over the past 12 months.

Local produce

The awareness about the benefits of products that are grown or produced locally has been on the rise for several years. The attraction in local production lies in the desire to be involved in the community, in increased freshness, and in fewer transportation miles.

When it comes to the question of eating locally-produced foods, our survey shows that in countries such as Portugal (75%), Spain (74%), France (72%) and Poland (72%), respondents are more likely to indicate that they are making an effort to eat locally-produced foods. Overall, the figure is 60%. Countries such as the Netherlands (42%), Denmark (45%) and Norway (47%) are relatively the least likely to do so.

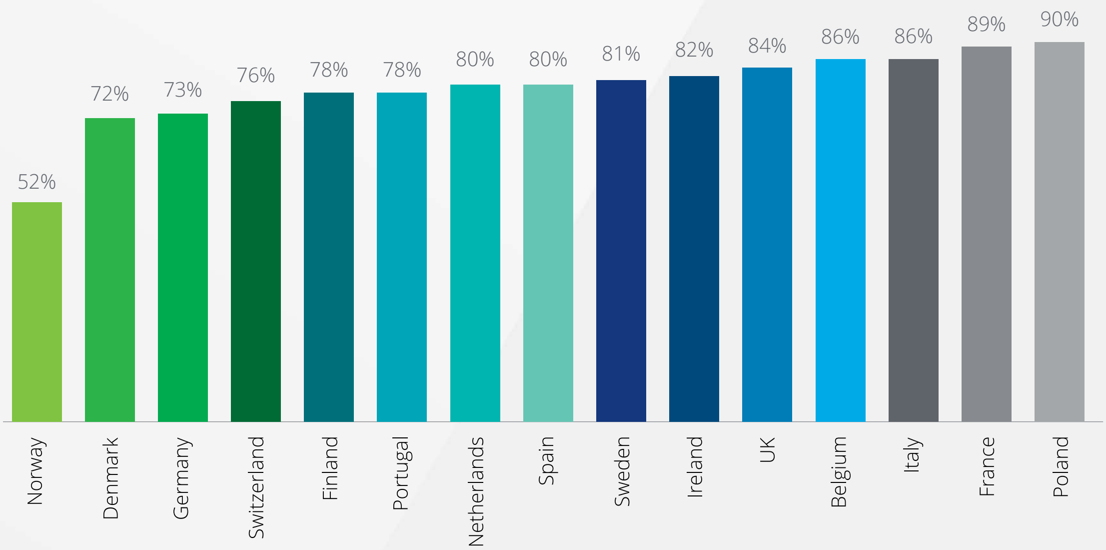
Bring your own bag is on the rise

A massive rise was seen in the number of people using reusable bags more often than 12 months ago. 79% of respondents indicate that they have increased their use of reusable bags over the past 12 months. It appears that government measures and increased awareness campaigns on the impact of plastic on the environment are driving desirable consumer behaviour.

Although there were some countries with a much lower result, e.g. Norway at only 52%, an average of almost 80% of respondents indicated that they use reusable bags more often than they did before. This would lead us to conclude that these consumers are putting their sustainability aspirations into practice.

Fig. 11: Behaviour: Shopping with reusable bags

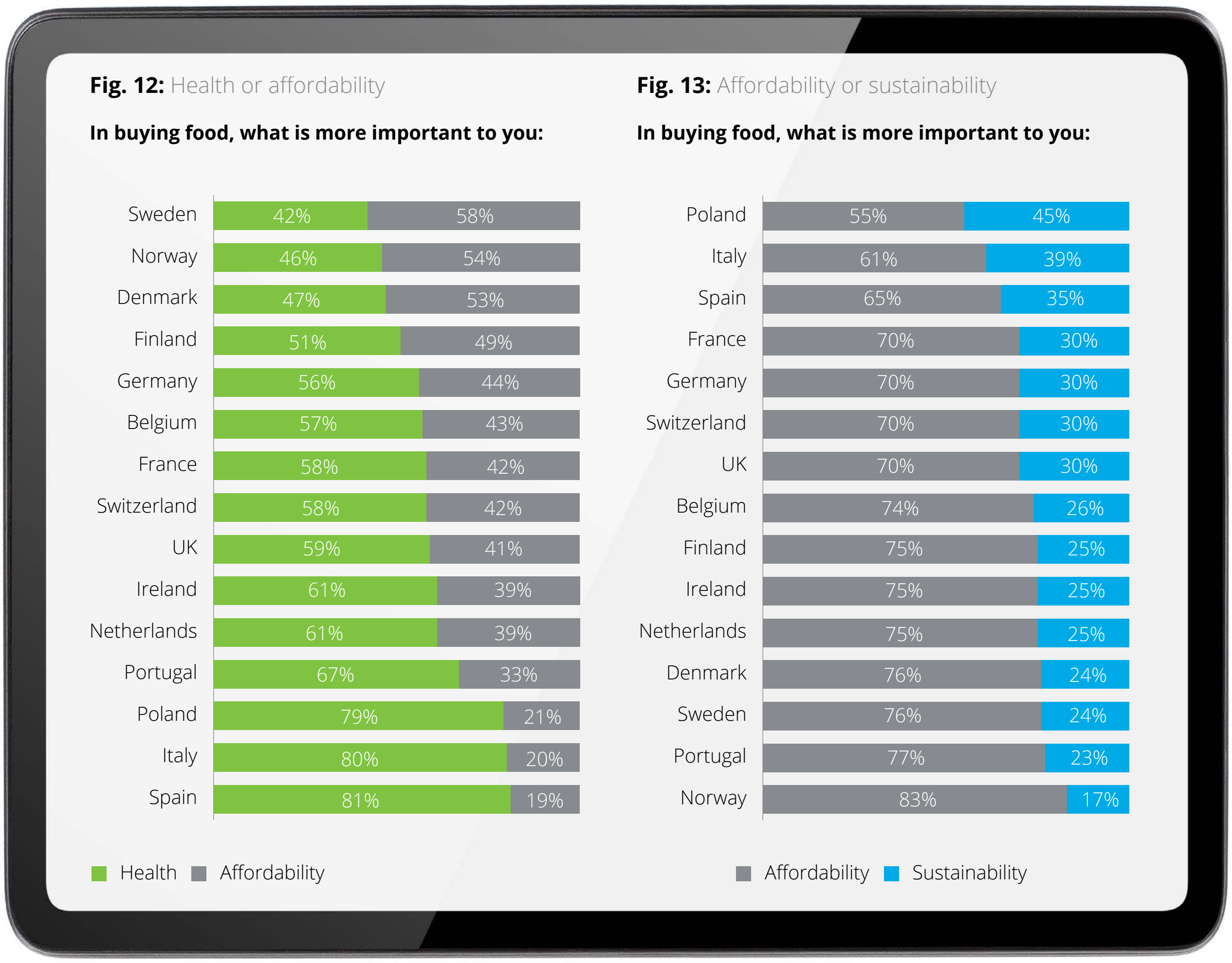
Statement: I shop more with reusable bags | **% Yes**



4. Do health and sustainability still matter when compared to affordability?

Considering both price and health is a difficult balancing act
A next section in our survey focused on affordability. We found that when respondents look at price separately from health and sustainability, price is the most important consideration. However, when judged in a comparison, i.e. when respondents have to choose between health or affordability, health becomes more important. On average six out of ten respondents choose health. Looking at the results per country, respondents in countries such as Spain (81%), Italy (80%) and Poland (79%), most often choose health over affordability when buying food. In countries like Sweden (42%), Norway (46%) and Denmark (47%), this percentage is much lower, and affordability is even considered more important when buying food.

Sustainability less important than health when compared to affordability
Next we compared sustainability and affordability and found that affordability is in most cases seen as more important than sustainability. When choosing between sustainability and affordability in buying food, on average, more than seven out of ten respondents choose affordability. In the 45-59 age group, the average is slightly higher at 75%. Respondents with higher incomes and, to a slightly lesser extent, respondents with a higher education level are more likely to choose sustainability over affordability when buying food. Although sustainability ranks lower than health when compared to affordability, the next set of questions in our survey show that a considerable number of people are still willing to pay (at least 5%) extra for food which is sustainably sourced.



When consumers have to choose, **60% choose health over affordability**.

5. Will consumers pay more for certain types of food?

When respondents are asked which types of food they are prepared to pay extra for, it appears that they are most prepared to pay extra (at least 5% more) for food that is produced locally (74%). 72% of the respondents are also willing to pay more for foods that are sustainably sourced (72%) and foods that are fair trade (72%) if these were available in their local shop. Respondents are, relatively speaking, the least willing to pay extra for food products that are free of any GMO raw materials. Perhaps this is caused in part by not knowing what it is? So, if we take GMO out of the equation, we can conclude that over 70% of respondents are willing to pay more for either local, sustainably sourced, organic, or fair trade foods.

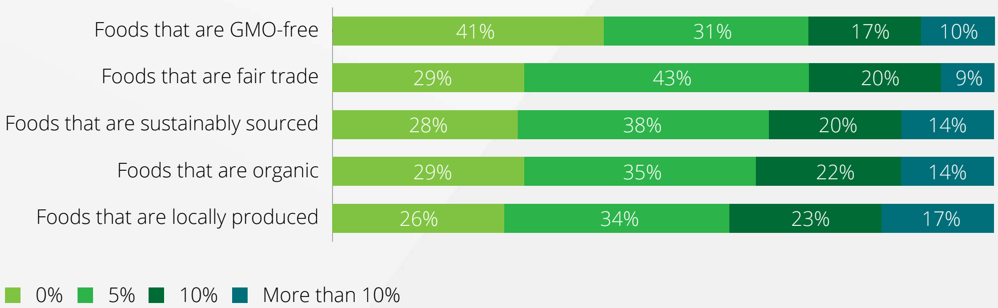
Sustainably-produced food

72% of respondents are prepared to pay more for food that is produced sustainably. 14% would even be prepared to pay more than 10% more for this. Of all age categories, young people (18-29) are most willing to pay more for sustainably-produced foods.

In the results per country, it is notable that respondents in Portugal (82%), Ireland (79%), Italy (78%) and Germany (77%) are most willing to pay more for food that is produced sustainably. In countries like Belgium (61%), Norway (62%) and Denmark (64%), this willingness is the lowest. When we split the results per segment,

Fig. 14: Paying more for food

Of the following types of foods, how much would you be prepared to pay more if they were available in your shop?



we see that respondents with a higher education and/or a higher income are more often willing to pay more for food that is produced sustainably.

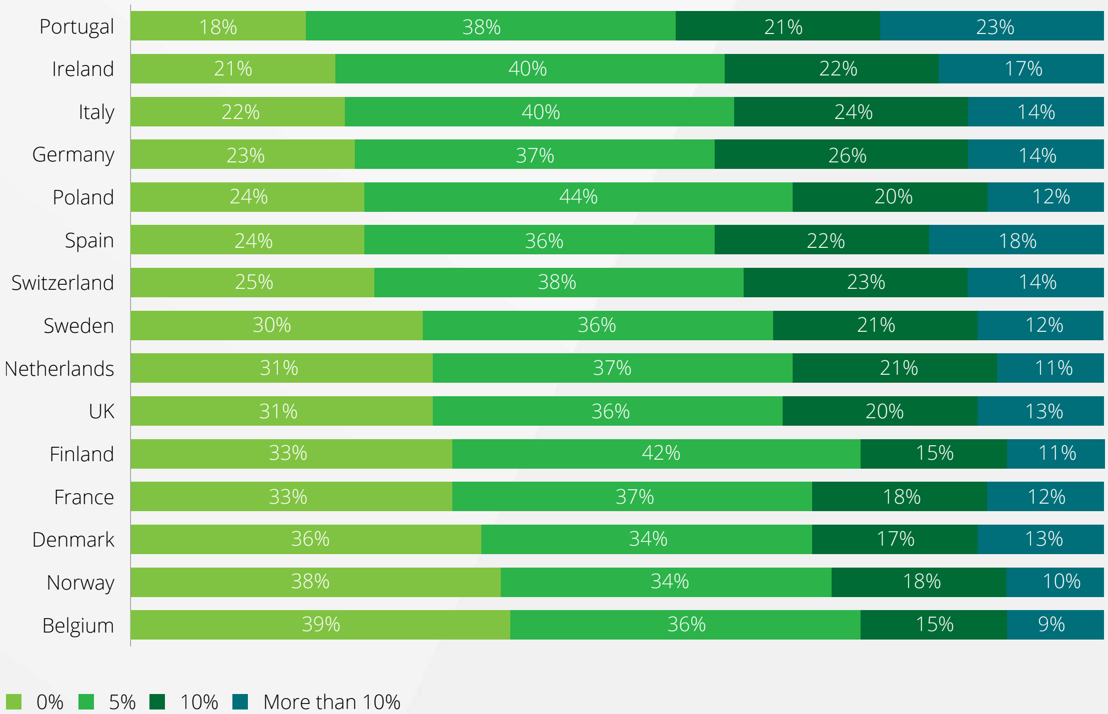
Paying extra for local produce, fair trade and organically-produced foods
74% of the survey's respondents are prepared to pay more for food that is produced locally. 17% are even willing to pay more than 10% extra for this. The willingness to pay more for locally-produced food is pretty evenly spread between men and women and respondents in countries like Ireland (80%), Portugal (80%) and Switzerland (80%) are the most willing to pay more for food produced locally. In Portugal and Spain, 24% of respondents are even willing to pay more than 10% extra.

71% of respondents are prepared to pay at least 5% more for foods produced in a fair trade manner, with 9% prepared to pay more than 10% more for such products.

When it comes to organically produced food, the willingness to pay more is highest in Poland (85%), Portugal (81%), Italy (76%) and Spain (76%). In Norway (60%), the UK (62%) and Belgium (62%) the willingness is lowest but still more than half of the respondents are willing to pay more for organically-produced food.

Fig. 15: Paying more for sustainable food

Of the following types of foods, how much would you be prepared to pay more if they were available in your shop?
Foods that are sustainably sourced



74% of consumers are willing to pay at least 5% more for food that is produced locally, even 17% is prepared to pay more than 10% for such products.

6. The role of government

Health and sustainability issues clearly matter to European consumers and these same consumers are increasingly expecting action from the government in this regard. Almost 50% of consumers feel that unhealthy food should be taxed higher, compared to just 28% that disagrees. The findings are slightly less profound for sustainable products but significant nevertheless. More than 50% of respondents indicated that health labelling, as is the case for cigarettes, could be added to labels of foods which are unhealthy and unsustainable.

Within the various segments, the greatest differences can be seen in the areas of education and income. Respondents with a higher education and/or a higher income are more often in favour of a higher tax on unhealthy foods. Respondents living in cities are also more likely to agree. The results point to an openness by consumers for governments to step up their involvement in helping people improve their diets. A large proportion of consumers are open their governments to get involved. To stipulate what consumers should be doing and to discourage what is 'bad' by taxing unhealthy and unsustainable foods.

Taxing unhealthy and non-sustainable foods

The results at country level show considerable differences between countries. Countries such as Italy (5.04), France (4.84), Portugal (4.84) and Finland (4.80) have, on average, the highest support for additional taxes on unhealthy foods. In countries such as Norway (3.85), Sweden (3.89) and Switzerland (3.90), there is the least support for such taxes.

When it comes to non-sustainable foods, respondents in countries like Portugal (4.72), Italy (4.69) and the UK (4.34) are, on average, most in favour of a higher government tax on such items. Countries like Norway (3.62), Switzerland (3.78) and Denmark (3.79) are less positive about such a tax.

Labelling unhealthy foods

Just over half of the respondents (51%) think that unhealthy foods should be labelled (like cigarettes are in many countries) to discourage the consumption of this type of product. This is a step further than, for example, the nutri-score label, which provides a view on the nutritional and health aspects of different products. Labelling products similar to that on cigarette packaging would entail much more 'scary' messages around the results of unhealthy eating. The more southern European countries, such as Italy (5.17), France (5.06) and Spain (4.99) are, on average, the most in favour of the idea of labelling unhealthy foods to discourage the purchasing of them. Countries such as Denmark (3.76), Finland (3.89) and Norway (4.01) are less supportive of the idea of labelling unhealthy foods.

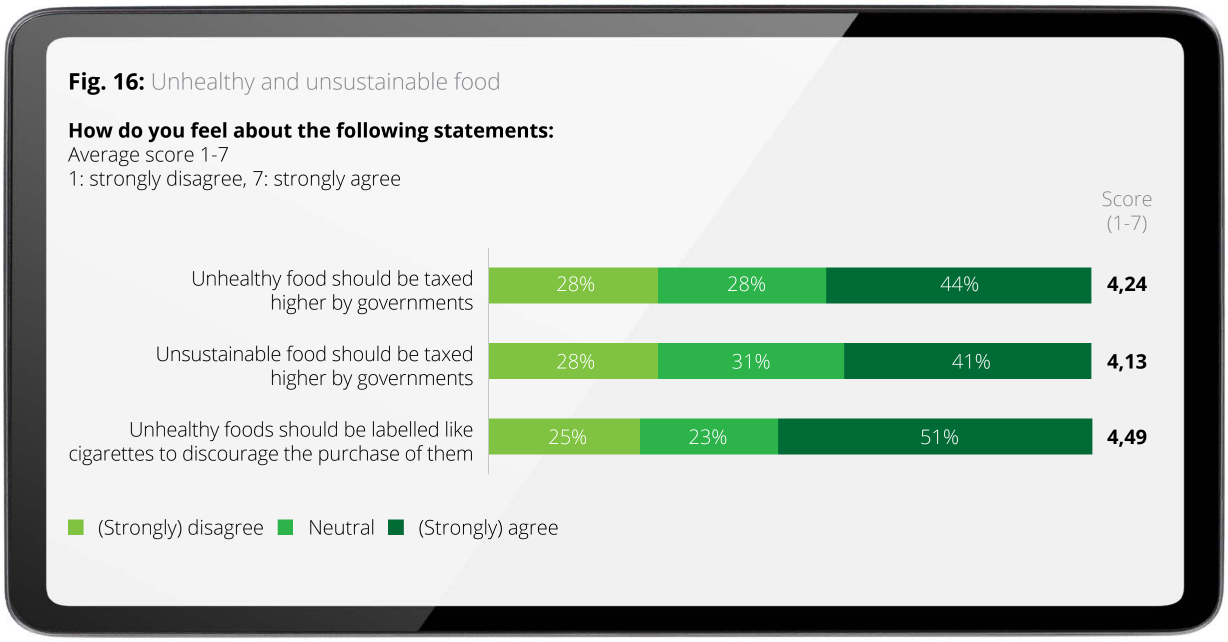


Fig. 16: Unhealthy and unsustainable food

7. The role of grocers in consumers' health

Consumers in Europe have a clear need for information on healthy living. Our survey shows that 79% of the respondents (occasionally) seek information on healthy living. When you add to that the fact that 53% of respondents indicated that they would like their grocer to educate them on healthier alternatives, you would think grocers are doing really well. But this is somewhat contradicted by the sources that consumers use to get their health information and how they look at the role that grocers currently play.

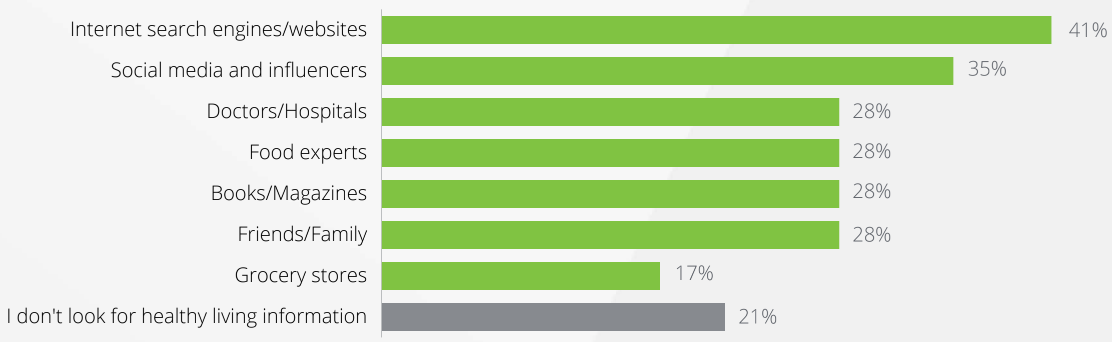
Where do consumers look for information on healthy living?
The internet (websites and search engines) is the most important source of information, at 41%. Social media (35%) is also an important source of information for more than a quarter of the respondents. Only 17% of respondents consider grocery stores a source of healthy living information.

Who do they trust the most when it comes to advice on healthy living?
Next we investigated trustworthiness of advice on healthy living. As shown in graph X, doctors are perceived as the most trustworthy in providing advice about healthy living (by 38% of the respondents). Food experts are also considered relatively trustworthy (36%). Despite the fact that many respondents use the internet as a source, only 11% find this source the most trustworthy of all response options.

For grocers, the most interesting outcome of this question was that grocers are only perceived to be the most trustworthy for healthy living advice by 4% of European consumers. That's an surprisingly low number, in particular when you consider that grocers are the providers of the majority of food that we consume. Of all the countries, the UK has the most trust in grocery stores but it is still very low at 7%. Again, room for grocers to step up and claim their space.

Fig. 17: Sources of healthy living information

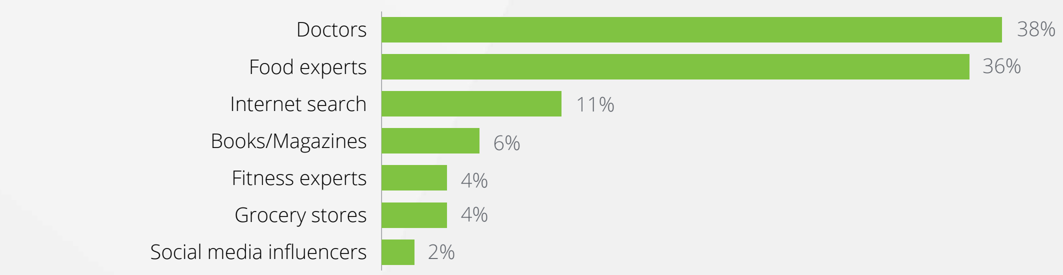
What is your current source of healthy living information:



Note: This graph does not add up to 100% as multiple answer selection was possible

Fig. 18: Trust in sources for healthy living

Who do you perceive to be the most trustworthy for healthy living advice?



8. Conclusion

One major result from our survey is that consumers are becoming increasingly aware of the relation between food and health. Consumers in Europe have become more interested in learning more about the influence of food on their health and have adjusted their buying behaviour according to these beliefs.

It is clear from the research that consumers are expecting grocers to actively do more in facilitating healthy and sustainable living. 37% of the shoppers interviewed, for example, indicated that they would support grocers excluding 'unhealthy' food products from the assortment.

Whilst more than 70% of consumers are willing to pay at least 5% more for organic foods, foods that are sustainably and locally sourced; grocers must continue to take affordability into account. Although there is an appetite to pay more for these products, grocers need to be conscious of price sensitivity and find a balance between providing healthy and sustainably-sourced products and affordable prices.

It is clear that consumers expect regulators to play a stronger role when it comes to increasing health and sustainability in food retail. Over 40% of respondents would like to see governments more involved in encouraging healthier and more sustainable grocery shopping.

They encourage government intervention to actively promote healthy and more sustainably-sourced foods, and actively discourage unhealthy, unsustainably-sourced options

Health and sustainability matter more and more when it comes to grocery shopping. There is lots of talk among European grocers about wanting to be orchestrators of healthy living and this is a compelling aspiration, and an aspiration that is clearly in tune with European consumer sentiment.

There is, however, a growing opportunity to say this more loudly and even a need to act this out more loudly. Healthy and sustainable grocery propositions are not just about what you do want to offer, but also about what you choose not offer or what buying behaviours you choose to discourage across your assortments. This research seems to imply that these bolder steps to encourage health and sustainability has the potential to be win-win outcomes; for the consumer, for society, for the environment, and also for the grocers.

Methodology

Target population and sample
The target group for this study are European consumers who are at least 18 years old and who are either responsible for or influence the choices of their household's grocery purchases. The online questionnaire was distributed in 15 countries in Europe: Belgium, Denmark, Finland, France, Germany, Ireland, Italy, the Netherlands, Norway, Poland, Portugal, Spain, Sweden, Switzerland and the United Kingdom.

Samples of 1,000 anonymous respondents were chosen in each countries and the sample were stratified by gender and age.

Belgium	1,366
Denmark	1,014
Finland	1,027
France	1,133
Germany	1,253
Ireland	1,029
Italy	1,395
Netherlands	1,066
Norway	1,050
Poland	1,052
Portugal	1,043
Spain	1,432
Sweden	1,028
Switzerland	1,115
UK	1,022
Total	17,025

Questionnaire
The Deloitte-designed questionnaire contained 28 main questions and the following topics were included:

- Demographics and sub-demographics
- Behavior when purchasing groceries
- Purchasing meal kits and using take away/meal delivery services
- Importance of aspects like price, health and sustainability when purchasing groceries
- Trustworthiness of sources and grocers when buying food, healthy living and sustainability

Results
The questionnaire was completed by more than 17,000 respondents from 15 countries over a two-week period in August 2021. In the analysis, the results of respondents who completed the questionnaire too quickly (using outlier analysis) were removed. When standard practice rounding of percentages is applied, some of the results in the graphs and tables may not add up to 100%.

Generalization of the results
Sampling was used for this study. Therefore, results in the population might deviate slightly from the results in the sample. To ensure that the study is reliable, the choice for the sample size is made on the basis of the following considerations.

- With 400 respondents (rounded up) it's possible to make statements with 95% reliability about a certain group.
- With 200 respondents (rounded down) it's possible to make statements with 90% reliability about a certain group.

With 1,000 respondents it's possible to make statement with more than 95% reliability within two groups (e.g. male/ female) or with more than 90% reliability for four groups (e.g. age groups). The calculation also applies if zooming in on, for example, education level.

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Acknowledgments:

The authors would like to thank:

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Designed by CoRe Creative Services. RITM0825042