



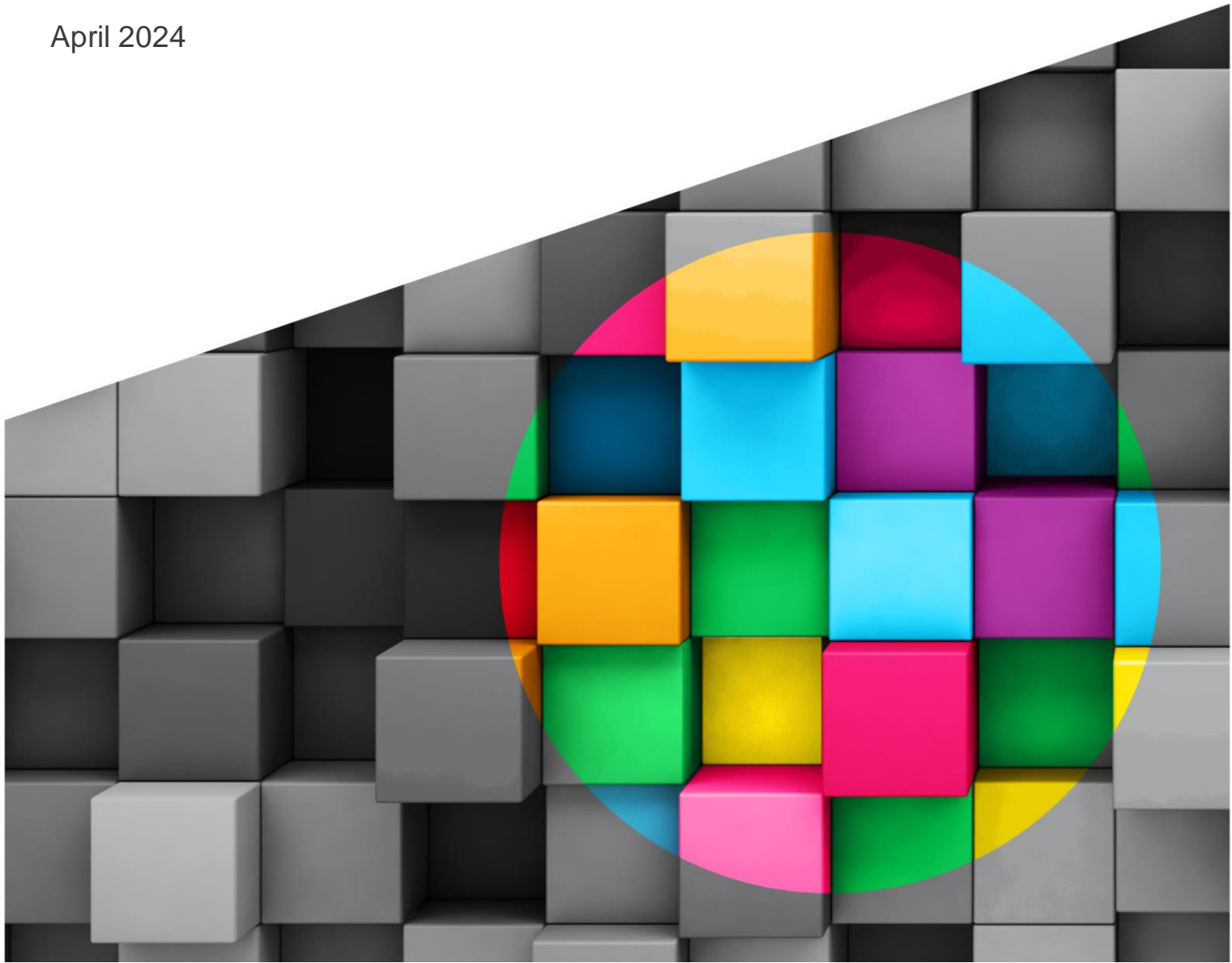
STRAT 7



# Consumer Understanding of Environmental Claims in Food & Drink Advertising

Qualitative Research Report

April 2024



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# 1. Executive Summary

The Advertising Standards Authority (ASA) is the UK's independent regulator of advertising. It applies the UK Code of Non-broadcast Advertising and Direct & Promotional Marketing and the UK Code of Broadcast Advertising (the Advertising Codes) written by the Committee of Advertising Practice (CAP) and Broadcast Committee of Advertising Practice (BCAP). The ASA ensures ads across all media are legal, decent, honest and truthful, taking action where ads are misleading, harmful, offensive or otherwise irresponsible.

The ASA has been regulating environmental claims for decades to ensure consumers are not misled and that ads are responsible. The Government has set ambitious targets to respond to climate change. In response, the ASA has been exploring how it can continue to play its part, by effectively regulating misleading environmental claims and ensuring that ads are making responsible claims. In September 2021<sup>1</sup>, the ASA set out key next steps following a review of its regulation in this area, including a commitment to undertake consumer research to inform its application of the Advertising Codes.

In 2022, the ASA published the findings<sup>2</sup> of its investigation into consumer understanding of carbon neutral and net zero claims and terminology used in ads for electric and hybrid vehicles. In June 2022<sup>3</sup>, the ASA announced its plans to commission research into the consumer understanding of two further areas: recycled, recyclable, biodegradable, compostable and other disposal claims (henceforth referred to as 'green disposal claims'); and environmental claims used in food and drink ads.

The ASA commissioned a qualitative study, consisting of 60 in-depth interviews, conducted across the UK. The study was split into two modules with 30 in-depth interviews exploring green disposal claims in ads (Module 1), and 30 in-depth interviews exploring claims in food and drink ads (Module 2). The sample included participants from different demographic groups, locations, and varying levels of engagement with the subject matter. The sample for Module 2 also included vegans, vegetarians and individuals with meat-inclusive diets.

*This report focuses on the findings of Module 2 looking at environmental claims in food and drink ads. The report setting out the findings of Module 1 was published in November 2023<sup>4</sup>.*

## 1.1. Summary of findings

### Overall attitudes to the environment across the entire sample

**Participants were aware and accepting of climate change as one of the most important issues facing society today.** Most participants accepted climate change as a fact, though few claimed to understand or engage fully with the topic in depth. Responsibility for tackling climate change was seen as one shared by all. Leadership was expected from government and international bodies - and the role of big corporations and those seen to be 'most guilty' of high emissions was seen as vital.

<sup>1</sup> <https://www.asa.org.uk/news/asa-statement-on-the-regulation-of-environmental-claims-and-issues-in-advertising.html>

<sup>2</sup> <https://www.asa.org.uk/resource/climate-change-and-the-environment-consumer-understanding-of-environmental-claims.html>

<sup>3</sup> <https://www.asa.org.uk/news/asa-statement-on-world-environment-day.html>

<sup>4</sup> <https://www.asa.org.uk/resource/asa-research-on-green-disposal-claims-in-ads.html>

**Most participants felt that on an individual level, they 'did their bit'**. There was a degree of defensiveness when talking about personally doing more – asserting the suggestion that moral responsibility lay with the businesses that created the problem, and influence over them lay with government and international bodies.

While levels of engagement varied across the sample, three kinds of individual activity emerged:

- **Action undertaken at home:** mainly related to recycling and food waste management. Most engaged on this level and felt a sense of pride in doing so.
- **Consumer action:** where participants factored environmental choices into their purchase decisions. For many, though, cost considerations overrode environmental considerations.
- **Life activism:** a few of the most engaged factored environmental impact into almost everything they did, including diet, travel and shopping habits. They were the most cynical about corporate environmental claims.

### **Environmental claims in advertising**

**There was an uncritical acceptance of environmental claims in advertising across the sample.** Participants believed advertising was highly monitored and regulated in the UK, so generally assumed brands were unable to make environmental claims without evidence and verification. This was particularly the case if ads included statistics, facts or used more technical terms.

A minority were more questioning of these claims, including:

- the more environmentally engaged who were more interested in investigating claims further and were more sensitive to potential cases of 'greenwashing';
- general business sceptics who lack trust in big corporations and the claims they make (in advertising as well as other contexts);
- vegans and vegetarians who were generally more used to approaching claims and products with greater scrutiny.

### **Reactions to environmental themes in food & drink advertising**

Nutrition and healthy eating were frequently cited as the primary drivers of dietary preferences and food purchasing decisions – habit/preference and affordability also play a role. The environmental impact of food was at most a secondary driver of purchase for most, and often used as post-rationalisation for choices rather than a catalyst.

For many vegans and vegetarians, there is an association of 'plant-based' with inherently 'healthy' eating, with many reporting their initial switch to a plant-based diet was triggered by a desire to eat more healthily. Similarly, those with a meat-inclusive diet argued in favour of a 'balanced' diet, referring to the protein and nutrients found naturally in meat and dairy.

For some of the vegan participants, there was a sense that vegetarianism does not go far enough to mitigate the impacts of a diet inclusive of animal products and felt that that an individual would have to commit to an 'all or nothing' lifestyle concerning animal products if they wanted to have any tangible environmental impact.

**In terms of reactions to food and drink advertising, nutritional claims or terminology could provoke challenge, whereas environmental claims and terminology tended to be accepted at face value,** generating little discussion, unless seen as overly 'preachy' in tone.

**There was a greater focus on nutritional claims in ads as they seemed more relatable and relevant to individuals.** However, such claims could become polarised when used to promote the benefits of a plant-based diet. Those with meat-inclusive diets often questioned the validity of a health-based claim regarding plant-based foods, arguing that such a diet cannot provide a nutritiously balanced lifestyle, and some understood that many plant-based meat replacements would be processed or ultra-processed, carrying negative health connotations.

**Environmental messages gained less traction,** primarily due to three factors which act as a barrier to engagement:

- The fact that nutritional perception is paramount to purchase decisions regarding food;
- The suggestion that claims and counterclaims made in ads comparing the environmental impact of plant-based products and animal products, cancel each other out;
- The sense that some ads can feel ‘preachy’, with claims perceived to vilify a participant’s lifestyle choice, such as the choice to eat meat, risking disengagement altogether.

**Smaller brands were seen as sincere and genuine** in their commitment to the environment, while attitudes to claims made by larger brands were met with a more mixed response. More engaged participants were often more questioning and alert to signs of ‘greenwashing’. Lower and medium engaged participants were more accepting, even of larger brands, rationalising this by arguing such brands were unlikely to risk unsubstantiated claims.

**The general assumption was that advertising was subject to regulation.** Participants assumed there would be some regulation over all claims, but that the degree or stringency of regulation would differ across claim type or specificity.

- The use of **broad claims** like ‘good for the planet’ were usually taken at face value. However, when in the more reflective mindset of the research interview, there was some concern expressed that such claims were so general that they were unlikely to be verifiable or subject to regulation – with some participants concerned that such claims could be a brand’s way of making stronger implicit claims without providing any evidence.
- The use of **specific terminology** like ‘plant-based’ or ‘vegan’ was assumed to be accurate as it was viewed as clear and verifiable. In addition, the consequences to the consumer of inaccuracy could be high – and immediate.
- **Data and technical terminology** were assumed to be subject to the strictest regulation, instilling a sense of authority into any claims made. However, reliance on these could also risk switching some audiences off, particularly those who are less engaged.

**The use of certain terminology or visual imagery in advertising contexts could lead to a cascade of associations, creating a halo effect** and imbuing a series of implied attributes into the product or brand that had not been explicitly claimed. For example, using the word ‘natural’ could lead to the assumption that the products were also certified organic.

Visual imagery could also evoke assumptions about environmental, animal welfare, and health claims. Images of produce which appeared ‘fresh’ could elicit beliefs in much the same way that terms such as ‘natural’ or ‘plant based’ could. *Green*, both as a colour and a word, was reported to be powerfully evocative of environmental and plant-based themes, signalling a brand’s environmentally conscious ethos without explicitly making any claim.

**While nutritional impact, habit/taste, and occasionally affordability, have a more direct impact on purchase behaviour, the power of environmental claims and terminology in food and drink advertising is likely to lie in their uncritical acceptance** and the 'halo effect' such claims have on brands through the assumptions made by consumers. The case for regulation is therefore felt to be strong, particularly with regards to:

- Green visuals/imagery and terminology such as 'natural'/'fresh' which have an overall halo effect, evoking assumptions about environmental credentials and potentially implying wider environmentally conscious practices.
- Comparative environmental impact claims, which would be ideally based on like-for-like comparative information across a given product lifecycle, including the supply chain and waste disposal. Preferably, this would be available on packaging or other point-of-purchase locations, such as on websites.
- Comparative nutritional information across alternative products, which would also come in the form of like-for-like comparisons. Some understood that this information would not necessarily need to be conveyed in the ad itself, but perhaps made available on the product website.
- Vague nutritional claims, such as 'healthy', 'good for you' and 'balanced', given the importance nutritional quality carries to consumer purchase decisions.
- 'Preachy' ads, which many felt should be held to a higher status of accountability regarding the claims made, particularly in cases where the brand criticises a common lifestyle or diet.

## 2. Introduction

### 2.1. Research background

The Advertising Standards Authority (ASA) is the UK's independent regulator of advertising. It applies the Advertising Codes written by the Committee of Advertising Practice (CAP) and Broadcast Committee of Advertising Practice (BCAP). The ASA ensures ads across all media are legal, decent, honest and truthful, taking action where ads are misleading, harmful, offensive or otherwise irresponsible.

The conclusions of the 2021 Intergovernmental Panel on Climate Change (IPCC) [report](#) highlighted the role of human activity in intensifying the pace of climate change and the need for a change in consumer behaviour if targets are to be met. Advertising plays an important part in reflecting and, potentially, endorsing and encouraging consumer behaviours and helping consumers make informed choices.

The ASA has been regulating environmental claims for decades to ensure consumers are not misled and that ads are responsible. The Government has set ambitious targets to respond to climate change. In response, the ASA has been exploring how it can continue to play its part by effectively regulating misleading environmental claims and ensuring ads are responsible. In [September 2021](#)<sup>5</sup>, following a review of its regulation in this area, the ASA set out key next steps, including a commitment to undertake consumer research to inform its application of the rules.

An [investigation](#)<sup>6</sup> into consumer understanding of environment-based terminology used in ads, initially focusing on carbon neutral and net zero claims and sector-specific terminology used in the electric and hybrid motoring sector, was undertaken in 2022. This, along with a number of significant rulings involving advertisers often in high carbon intensity sectors, led to the [publication](#)<sup>7</sup> of updated guidance to assist with the interpretation of Code rules that concern environment-related advertising issues.

In [June 2022](#)<sup>8</sup> the ASA announced its commitment to a second consumer research project, this time focusing on the use of green disposal claims in ads, and claims made in ads across the food and drink sectors.

Jigsaw Research was commissioned to conduct this qualitative study on behalf of the ASA to build a base of knowledge on consumer attitudes and understanding in these areas in order to inform the ASA's regulation of relevant claims made in ads.

### 2.2. Research objectives

The key objectives of the research were to investigate:

- consumer understanding of key environmental claims made in ads;
- how understanding of these terms applies or is dependent on the context of the ad or product sector;

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<sup>5</sup> <https://www.asa.org.uk/news/asa-statement-on-the-regulation-of-environmental-claims-and-issues-in-advertising.html>

<sup>6</sup> <https://www.asa.org.uk/resource/climate-change-and-the-environment-consumer-understanding-of-environmental-claims.html>

<sup>7</sup> <https://www.asa.org.uk/news/update-to-cap-and-bcap-guidance-on-misleading-environmental-claims.html>

<sup>8</sup> <https://www.asa.org.uk/news/asa-statement-on-world-environment-day.html>

- if, and how, consumers' understanding of these terms influences their purchasing decisions.

The study was designed to explore two key areas.

### **Module 1: Green disposal claims in ads**

This module covers an investigation of consumer understanding of green disposal terminology used in ads, specifically:

- recycled
- recyclable
- biodegradable
- compostable

The focus was on investigating what consumers understand from these claims, within the context of specific ads.

### **Module 2: Environmental terminology in food and drink ads**

Ads for food and drink products that seek to highlight environmental benefits, including for meat and dairy products and their 'meat-free' and 'dairy-free' alternatives, tend not to use claims that are common across different ads.

So, in this module we explored consumer attitudes to a range of ads featuring different creative styles and terms to gauge the overall impression given by the ad and how this was interpreted. Comparative claims (which state or imply that the product is better, etc. than others) are likely to be prevalent in this area, as well as the use of phrases such as: 'good for you'; 'good for the planet'; and 'sustainably sourced'.

*This report focuses on the findings for Module 2. The report setting out the findings of Module 1 was published in November 2023<sup>9</sup>.*

## **2.3. Research methodology**

A qualitative approach was felt to be the most appropriate given the objectives of the project. The discursive nature of qualitative research is better suited for exploratory studies where the goal is to understand behaviours and attitudes, rather than simply to describe them. It is also the only approach potentially sensitive enough to distinguish between idealised and real behaviours and motivations – which is important with subjects like the environment where social norms are strong.

The two most common methodologies in qualitative research are the group discussion and the one-to-one in-depth interview. The in-depth interview was selected for this study rather than the group discussion because it:

- allows a greater sense of an individual's attitudes, motivations and beliefs:

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<sup>9</sup> <https://www.asa.org.uk/resource/asa-research-on-green-disposal-claims-in-ads.html>



- is less likely to encourage posturing than the group environment:
- is a better vehicle to gauge comprehension of words and concepts.

Given ongoing concerns over the Covid-19 pandemic, it was agreed that the interviews would be conducted online. The sessions lasted between 30 and 60 minutes and followed a discussion guide agreed upon in advance with the ASA. Fieldwork took place between 22 March and 17 May 2023.

## 2.4. Research sample

The project was comprised of 60 in-depth interviews, split between the two modules, with 30 interviews conducted as part of Module 1 looking at green disposal claims and terminology, and 30 interviews conducted as part of Module 2 looking at claims made in food and drink ads.

The objective of qualitative research is not to generate statistically valid findings, but to ensure the sample is broad enough to capture the range and variety of potential responses. The appropriate sample size in a qualitative study should be sufficient to allow for confirmatory findings without generating repetitive data (saturation).

Given the objectives of the study, the number of stimuli and the number of potential sub-groups, a sample size of 30 was felt to be appropriate. A sample of 30 interviews is generally viewed as robust by market research experts.

The structure of the sample was designed to mirror the UK demographic makeup, including an appropriate spread of socio-economic groups, life stages and family households. Additionally, the sample incorporated the following criteria:

- **Locations:** Fieldwork was conducted across the four nations and included a mix of urban and rural locations.
- **Ethnicity and gender:** An even split of gender and representation of Black, Asian and Minority Ethnic groups.
- **Age range:** The sample was made up overwhelmingly of individuals aged 18 to 65 years, though there were a small proportion of respondents whose ages were outside of this range.
- **Environmental engagement:** A spectrum of more and less engaged participants were included – engagement levels were determined through responses to a range of attitudinal statements at the recruitment stage.

Interviews conducted as part of Module 2, looking at food & drinking advertising, involved participants with different dietary preferences, including vegans, vegetarians and individuals with meat-inclusive diets.

Full details of the sample achieved can be found in Appendix 7.3.

## 2.5. Interview structure

Interviews in both modules followed a similar structure and were designed to gain insight into participants' understanding of and attitudes towards the claims. Descriptors were explored in the context of overall reactions to the ad stimulus used in the interviews.

Being qualitative in nature, the interviews were flexible, allowing the conversation to be sensitive and responsive to the priorities of the individual participant. However, a consistent outline flow was adopted:

- Following on from the introductions, discussions started with initial exposure to the ad stimulus and exploration of general reactions with up to six ads, from a range of media, shared with each participant. Discussions allowed for any reaction to the term/descriptor/claim to emerge at a spontaneous level.
- This was followed by a general discussion about the participant's attitudes to environmental issues and an exploration of any environmental action or environmentally inspired behaviours they engaged in.
- Given the nature of the claims found in food and drink ads, there were no definitions to show in this module but instead the researcher picked out a range of claims, terminology, and creative elements from the advertising to explore in more detail.

## 2.6. Stimulus material

The ASA provided a broad range of advertising examples for each module, covering:

- Different media (TV, press, radio, outdoor and digital);
- A range of sectors relevant to each module
- A variety of creative styles (e.g., some more formal, others more playful).

There were 26 pieces of stimulus in Module 1 and 32 in Module 2. A rotation was designed to ensure balanced coverage across the sample. Each ad was viewed approximately six times.

The ads used in Module 2 were grouped by theme to ensure each participant was exposed to a variety of claims, terms and creative styles. The themes included:

- ads featuring plant-based claims
- meat and dairy ads
- ads linking nutritional claims with environmental claims

During the sessions, the stimulus was shared on-screen. Participants were asked to join the interviews using a laptop so that they were able to see and hear clearly what was being shown.

The stimulus is referenced throughout, and a summary of each ad can be found in Appendix 7.2. References to specific ads are denoted by the brand name and a number corresponding to the relevant ad on the stimulus list e.g., Oatly<sup>1</sup> refers to the Oatly ad listed as number 1 in the appendix.

## 3. Attitudes to environmental issues

### 3.1. General attitudes and behaviours

Note: Attitudes and feelings around climate change were not explored in detail, but discussed briefly in their own right, in addition to emerging spontaneously in reaction to the claims, descriptors and the advertising stimuli. Findings in this section are based on discussions covered in both Module 1 and Module 2.

*Participants were aware and accepting of climate change as one of the most important issues facing society today. Most felt they had an individual responsibility to minimise their environmental impact, though believed the bulk of responsibility lay with those in 'power' (i.e., Government and international bodies) and those considered most guilty of high emissions (i.e., larger corporations and high carbon emitting sectors of the economy).*

#### Environmentalism is part of modern life

There was a sense that climate change was the predominant media and cultural subject of our times. Many accepted this was entirely appropriate given the scale and seriousness of the challenge. Participants were often unable to specify from where they received information about the subject, instead feeling it was coming from 'everywhere' in society and culture, certainly from media, Government, campaigning organisations and brands. Younger participants had learned about the issue at school.

It was seen as a challenging topic to understand and few, irrespective of engagement levels, claimed to understand the subject fully:

*I am quite informed. Try to keep on top of things but if you knew everything you'd be overwhelmed.*

**(Wales, Female, 30, High Engagement)**

*I am no expert ... I know we are very behind on global warming.*

**(England, Male, 28, Medium Engagement)**

Across the sample range, climate change was accepted as proven fact. Most participants also accepted human agency – and human ability to slow or, at least limit, the pace of climate change. Some of the less engaged were more sceptical about the impact of consumer, industry and governmental action – but not the threat itself.

There was a background feeling for some that environmentalism had become part of the fabric of life, and for so long, that it had slightly diluted the sense of urgency around it. At the time of conducting fieldwork, the risk of escalation of the war in Ukraine into a nuclear confrontation seemed like a much more immediate threat to some.

*We are not short of things to be worried about at the moment, are we?*

**(England, Male, 34 Low Engagement)**

The role of the young leading the fight was recognised and broadly welcomed. Some of the older participants joked about how their children would lecture them on environmental issues. However, attitudes to protest activity were much more varied, with some very critical of some environmental campaign groups.

Responsibility for tackling climate change was seen as one shared by all. Leadership was expected from international organisations and governments, but the role of big corporations and individuals was also seen as vital.

*We all [have a] part to play – we need to come to combine our voices to pressure companies.*

**(Wales, Female, 30, High Engagement)**

*We are all responsible and [have a] role to play but [it] must start with education.*

**(England, Male, 28, Medium Engagement)**

*Need to start at [the] top and each player play its part ... Gov, biz, local council, individual.*

**(England, Male, 22, High Engagement)**

*I imagine the government would have climate advisors, and that would filter down. And if we needed to be told that we needed to stop or reduce or do something, I would expect that message would come from a higher power like the government who would have those advisors.*

**(Wales, Female, 34, Medium Engagement)**

But the responsibility was not an equal one. The primary blame was assigned to big corporations, especially those operating in the energy and aviation sectors.

When discussed in abstract terms, cynicism was expressed about the role of big brands, especially the role they claimed to play in advertising and brand communication. These claims were often attributed to 'box ticking', 'greenwashing' and 'virtue signalling'.

### **The role of the individual in fighting climate change**

There was strong consensus that everyone had a role to play. Most claimed they were indeed 'doing their bit'. The feeling was that if everyone did their fair share then real progress was possible.

There was a degree of defensiveness expressed when talking about personally doing more – asserting the suggestion that moral responsibility lay with the businesses that created the problem, and influence over them lay with governments and international bodies, such as the UN.

The range/scope of individual contributions depended on levels of engagement and is explored below.

Despite very different individual effort levels described, most use the phrase 'doing their bit'. Ironically, it tended to be the most engaged and most active who were most critical of the scale of their personal contribution, and this seemed to reflect greater understanding of the scale of the challenge and the urgency required.

*I do my bit, all the recycling ... there are three bins now!*

**(Wales, Female, 63, Low Engagement)**

*In the overall scale of things, I know I don't do enough.*

**(Wales, Female, 30, High Engagement)**

*All of us are responsible. Anyone who travels, drives a car, throws rubbish out, recycles, washing, heating, electricity. All our little actions have a big impact. Everyone has a part to play to make the situation better.*

**(Northern Ireland, Female, 17, Medium Engagement)**

The degree of engagement in the environment was of course dependent on individual personality and life experience. However, there did seem to be some common factors that influenced engagement levels, namely:

- **Political beliefs:** Those with more progressive beliefs tended to be more engaged.
- **Age:** Younger people were more likely to be engaged.
- **Levels of education:** Those with a higher education were more likely to be engaged.
- **Parental status and the age of children:** Parents may have received some education from their children, but also felt a greater sense of future focus that came with raising a child.

### **The scale and nature of individual contributions**

The extent and nature of environmental action taken by participants was largely dependent on engagement levels. Three main activities emerged:

- **Action that was undertaken in the home**

This was mainly recycling and collecting food waste and was the most common activity that was defined as environmental in nature. It was an activity the vast majority of participants were engaged in. Some undertook the task on a daily basis, others, engaging weekly, prior to waste collection. The only exceptions were younger participants who still lived at home – in these situations the primary responsibility (of sorting waste into appropriate boxes and placing outside for collection) was seen to lie with their parents. However, these younger participants played a secondary role in the activity, for example, by helping to place material into the relevant boxes during the week.

Even though this was an activity required by local authorities, the activity was not seen as mere compliance and there was a degree of pride in the activity – given the time and effort invested.

- **Consumer action**

Factoring in environmental impact into purchase choices was another fairly common environmental activity. Many participants viewed purchasing an environmentally friendly product to be a legitimate form of ‘doing their bit’ to help the environment. However, there was a strong association between ‘green’ products and expense, which limited the scale of this behaviour and tended to exclude low engaged participants.

There is more detail on shopping behaviours later in the report.

*I do feel myself quite drawn to companies that have a sustainable or eco message*  
**(England, Female, 54, Low Engagement)**

- **Life activism**

For some of the highest engaged participants, the environment played a much greater and broader role in their lives. They were much more knowledgeable about the subject and prided themselves on considering the environmental impact across their whole lifestyle – including diet, travel and purchases. They were also the most cynical about corporate environmental claims around offsetting and other activity. Vegans and vegetarians were more likely to be included in this segment.

*I am passionate about it ... I know you have to think about it holistically ... how you personally live your life.*  
**(England, Male 22, High Engagement)**

### **Environmentally conscious behaviour came with a cost**

There was an expectation that environmentally conscious behaviour involved some sort of sacrifice. For green disposal activity this translated into an investment of time. There was also the initial investment of learning the sorting system. This investment was not insignificant, especially for some older participants and in those areas where the process was more exacting – for example, in Wales where they used a five-box system.

In terms of consumer action, the starting point was what could be afforded, not what was required by the crisis. Most assumed doing the right thing environmentally costs more, either in time (preparation, research) or money. For most, financial cost is the predominant deterrent – ‘it all depends on price’ was a frequent response to any question of purchasing products claiming or assumed to be ‘green’. This attitude is consistent across the sample, with the exception only of the highest engaged. The idea of paying more, for more environmentally-friendly products, was seen as even more unlikely in current, straitened times. Responsibility therefore is seen to come with financial capacity. These products were seen as for the ‘well off’, and it was their duty to pay the premium.

In one sense the environmental claims can work against the likelihood of purchase. The belief that environmentally-friendly products come with a price premium, is so ingrained, that it seemed that some do not confirm this hypothesis by actually checking prices.

*Unfortunately, with being on maternity leave at the minute, it is about what we can afford to do.*  
**(England, Female, 34, High Engagement)**

*Who shops at Waitrose? We don't shop at Waitrose ... only the rich shop there. It's good but it wouldn't affect me because I don't shop there. It's too expensive.*  
**(Northern Ireland, Female, 52, High Engagement)**

*We need to weigh the benefits and the cost as well ... I would like to have a healthier option, but if the healthier option is almond milk ... it's more expensive.*  
**(Scotland, Female, 34, Medium Engagement)**

### 3.2. Overall attitudes to environmental claims and terminology in advertising

Section 4 explores reactions to specific food and drink ads featuring claims in more detail. However, some findings are true across both modules covered in the research and relate to environmental messaging in general.

*Most participants accepted claims made in advertising as true. There was little criticism and/or scrutiny of brands making environmental claims and an assumption that these claims were verified before they could be broadcast/published.*

#### Uncritical acceptance of advertising claims is the norm

There was a tendency for environmental advertising claims and use of terminology to be accepted at face value. When participants were pressed on this, they were able to rationalise it. There was a common background assumption that an approval process of some sort existed that assessed ads. There was little knowledge or interest in who this body might be, or the procedures involved. When they were asked to think about it, some guessed it may be the ASA.

*I know our marketing is very strictly regulated so I assume there are agreed definitions?*  
**(England, Male 22, High Engagement)**

*I feel like if a brand says organic or sustainable, I'd believe them. They probably did have to prove it.*  
**(Northern Ireland, 17, Medium Engagement)**

This assumption seemed stronger if the advertising included statistics or facts or more technical-sounding terms (e.g., biodegradable).

There was also some belief that larger brands may be more risk averse and more protective/invested in their corporate reputation as well as being more likely to be subject to public scrutiny (e.g., via social media).

*I would assume big companies would have to be more specific in what they are saying.*

**(England, Female, 34, Low Engagement)**

*I think it needs to meet a certain threshold or criteria to be classed as sustainable, but I wouldn't know what that criteria would be.*

**(Wales, Female, 35, Medium Engagement)**

However, others argued larger brands would be better equipped to find loopholes to avoid getting in trouble/facing legal repercussions.

There was more trust expressed in smaller brands – and they were often assumed to be more genuine in their claims. Being eco-friendly was seen as much more central to their whole ethos/identity – not in any sense a bolt-on.

*Brands are smart. They do their research to work out what they can say and have professionals who ensure they stay within the limits of the law.*

**(Scotland, Male, 52, Low Engagement)**

When questioned, it became clear that fewer checks/certification was assumed for implicit claims, like 'good for the planet' or indeed advertising that was more light-hearted in tone.

Overall, the cynicism expressed when talking about brands in general was not often translated in the responses into individual ads. A minority were more questioning of claims, including:

- **The more environmentally engaged**

These people were genuinely interested in the issues raised by the advertising. Unlike others they didn't simply want to ignore and carry on in 'blissful ignorance'. They tended to be much more knowledgeable of the science of environmentalism. They were also more sensitive to any 'greenwashing' in the ads that were shown to them. While the lower and medium engaged participants would often rather not know about any potential dishonesty or exaggeration, some of the higher engaged participants seemed motivated to identify lapses.

- **General business sceptics**

This minority were less motivated by environmentalism than a general cynicism about big corporations and their motivations – and this included any misleading environmental claims.

- **Vegans and vegetarians**

These participants were used to approaching claims with greater scrutiny, such as reading the 'small print' to check for meat or dairy products, and this had become part of how they engaged with the world.



*If you are Vegan you get used to having to be sceptical and look into everything.*  
**(Northern Ireland, Female, 52, High Engagement)**

## 4. Environmental themes in food and drink advertising

### 4.1. Key purchase drivers

*Nutrition and healthy eating were frequently cited as the primary drivers of diet and food purchase. Even for vegans and vegetarians who cited environmental reasons as a factor, this was often a secondary consideration. Habit/preference and affordability also played a key role.*

Across the sample, respondents argued that their diet and shopping choices derived from concerns over health and, occasionally, affordability. Despite arriving at opposing conclusions, these motivations were consistent across both plant-based and meat-inclusive diets.

For many vegans and vegetarians, there is an association of plant-based with inherently 'healthy' eating. Many vegans and vegetarians who grew up eating meat reported that their initial switch to a plant-based diet was triggered by a desire to eat more healthily. Even for many of those who cited environmental reasons in their motivations to cut back partially or entirely on meat consumption, health concerns remained a strong factor.

Similarly, those who continue to eat meat argued in favour of a 'balanced' diet inclusive of animal products, referring to the protein and nutrients found naturally in meat and dairy. For these participants, a plant-based diet could be seen as lacking core dietary requirements, such as vitamin B-12 and high enough levels of protein. In the case of parents, educating children to eat 'healthily' could include a balanced, meat-inclusive diet, which would also be a key concern of personal and family dietary choice.

*Let's forget about the climate for a minute. It's more, are you eating healthier, rather than the climate.*

**(Scotland, Female, 34, Medium Engagement)**

*I'm aware of some environmental issues, but do you always care, no you don't.*

**(Northern Ireland, Male, 34, Low Engagement)**

There was also some discrepancy in how participants responded to rising prices. For some, affordability constraints meant cutting back on certain meat options in favour of cheaper staple proteins, such as legumes. However, there was a strong sense amongst many that vegan and vegetarian food products, such as non-dairy milk or alternative meats, came at a price premium. Though affordability was rarely a strong driver, it could play a role in justifying a diet or lifestyle choice, particularly amongst those who were rarely or never motivated by ethical or environmental reasons at point of purchase.

*[Water content] What I take away from this, is, it's got to do with money. I feel like water content is going to be higher in the cheaper products, and the more expensive products will have less water content.*

**(Wales, Female, 34, Medium Engagement)**

### **Habit and preference can also play a role**

For many, arguments in favour of personal dietary choice could be secondary to basic preferences. Many of those who eat a meat-inclusive diet grew up doing so and enjoy the taste and convenience of eating animal products. Similarly, some of those with plant-based diets simply don't enjoy the taste of meat and dairy, or have other reasons for dietary restriction (such as religion or certain food intolerances). Arguments based on environmental or nutritional concerns can often, therefore, be more of a post-rationalisation than a catalyst for dietary choice.

### **Ethical motivations were usually secondary, if prevalent at all**

Environmental factors were often considered a bonus, rather than a driver, of purchase. For some vegan, vegetarian and reduced meat-eating respondents, environmental factors were relevant, but not paramount, to their dietary choice. Individuals who reduced or cut out their consumption of animal products would often initially do so because of health or financial reasons, and only later learn about the environmental benefits of a meat reduced or exclusionary diet. For some, these environmental benefits can act as a confirmation bias for their dietary preferences, and lead to post-rationalising of these preferences with ethical concerns. Many participants in this camp felt their political consciousness and environmental awareness had been significantly increased since adopting a meat reduced or exclusionary diet.

*I became more conscious to buy and eat more healthily. The environment was fringe to this, not central.*

**(Northern Ireland, Male, 65, High Engagement)**

There were, however, a small number of highly engaged vegetarians and vegans within the sample who felt environmental concerns were integral to their dietary preference. For many of these vegans, there was a sense that vegetarianism does not go far enough to mitigate the harmful impacts of a diet inclusive of animal products. Vegans could feel that an individual would have to commit to an 'all or nothing' lifestyle concerning animal products if they wanted to have any tangible environmental impact.

There was an additional group of vegans and vegetarians whose diets were heavily motivated by animal welfare concerns. Though this presented a highly emotive motivation for this group, their sample presence was low.

## **4.2. Primary concerns in advertising**

*Ads containing claims relating to nutrition provoked stronger emotional responses than those including environmental claims. Environmental claims and terminology garnered little response unless considered 'preachy' in tone.*

### Nutritional concerns

Participants responded most emotively to advertisements with nutritional claims, such as ‘good for you’ and ‘healthy’. This reflected the tendency of respondents to prioritise nutrition and health over ethical concerns when considering dietary lifestyle. Ads that focused on health-based claims were more engaging, even provocative, than their environmental counterparts. Where both approaches were highlighted, the conversation tended to focus more on the nutritional content.

However, such health-based claims can become particularly polarised when addressing vegetarian or vegan food brands that advertised the benefits of a plant-based diet. Those with meat-inclusive diets often questioned the validity of a health-based claim regarding plant-based foods, arguing that such a diet cannot provide a nutritiously balanced lifestyle. Further, some respondents across the dietary spectrum understood that many plant-based meat replacements (such as burger patties and sausages) would be processed or ultra-processed, which can carry negative health connotations.

*What's healthy to Hello [Fresh]?... What's healthy to them might not be healthy to me.*

**(Scotland, Female, 34, Medium Engagement)**

### Environmental factors

The environmental messages gained less traction, especially amongst low and medium engaged participants. There was little spontaneous reaction. Whereas the nutritional claims were core to motivation and seen as directly related to food, the environmental links were more distant and rarely top of mind.

Some more engaged respondents were aware of the environmental impact of certain foods or diets and better able to understand those links. However, environmental themes in food advertising did not evoke strong emotional reactions (such as the anger that might be targeted at, say, the energy or transport sectors). This was due to three primary factors which act as a barrier to engagement:

- **Nutritional perception is paramount** when purchasing decisions are made regarding food. Arguments for or against environmental impacts do not respond to the consumer’s key concerns in the way that arguments for health and nutritional benefits do. Environmental or ethical concerns could be perceived as a bonus to a product – not often as a driver of purchase.
- **Claims and counterclaims can cancel each other out.** While plant-based brands frequently disparage the impact of animal products on the environment, many meat and dairy brands advertise the environmentally positive aspects of certain animal products. One such example was the National Farmers Union ad<sup>28</sup> comparing the water consumption of dairy milk and almond substitute, which depicted data suggesting almond milk requires far more tap water for production than dairy milk. Respondents could interpret the contradictory claims as evidence that the environmental impact is ‘all much of a muchness’, and presume the environmental differences between two products, weighed evenly, must not ultimately be very great.

*I know there's a lot of talk about the increase in the popularity of avocados and [the impact of] all the additional farming of avocados is having on the planet and all the transport – it makes me think there's two sides to the coin... I don't not believe it, I don't dispute it, I just think there are positives and negatives to everything.*

**(England, Male, 31, Low Engagement)**

- **Some environmentally focused adverts can come across as ‘preachy’.** Respondents rebuked the tone of certain adverts – particularly plant-based brands – that seemed to put down a given diet or lifestyle. Ads that seemed ‘preachy’ – such as the Birdseye<sup>4</sup> ad depicting a girl asking her dad if he thought he was “... more cleverer than all the scientists” because he questioned the impact of a plant-based replacement – could trigger hostility amongst respondents who feel targeted by such rhetoric. Among those who responded with hostility, there was a strong risk of switching off engagement altogether.

*I appreciate the message. There’s nothing there that I wouldn’t believe. But when I feel like I’m being told off, I just think, pfft – next.*

**(Wales, Female, 34, Medium Engagement)**

There was a general acceptance that a vegan or vegetarian diet would likely have less of an environmental impact than a meat-inclusive diet, even amongst some who eat meat. Some respondents made vague reference to more complex or niche factors, such as carbon emissions, food miles, water consumption and unintended consequences (such as bee health in Californian almond production); though the extent of their knowledge was limited (i.e., they had just heard about it ‘somewhere’, ‘at some point’). Most, however, were not strongly engaged with environmental terminology and would not spontaneously mention these factors when asked to consider environmental factors in a given product.

### **Brand trust**

Respondents were on average more likely to trust smaller brands than larger brands regarding environmental messaging. There was a sense that a smaller brand would be more authentic and genuine because they may be less likely to have ulterior motivations, such as shareholder profitability or mass consumerism (which could be perceived as antithetical to environmentalism). Further, smaller brands seem to be at more risk of high adverse response from ‘getting it wrong’, as a stronger part of their brand persuasion would be environmental factors. Environmental claims were therefore taken largely at face value from smaller brands, instilling a broader feeling of trust toward the brand’s ethics and practices. This trust could include assumptions about vague or implied claims, such as in the case of participants presuming HelloFresh<sup>31</sup> would be entirely organic or local, given their name and branding imagery.

By contrast, larger brands that claimed to be environmentally friendly were met with a more mixed response.

For many there was greater scepticism, particularly from more engaged participants. These participants pointed out that larger brands advertising environmentally friendly alternatives, such as a plant-based burger, would typically still profit primarily off the (perceived as) less environmentally friendly meat products. This practice could suggest to some that these brands were driven purely by profit (as opposed to ethics) and are simply trying to appeal to a different market demographic. For others, larger brands showcasing their environmental initiatives could be perceived as a ‘box-ticking’ exercise, to evade scrutiny of other environmentally poor practices.

*To make people eat less they need to sell less. They are putting it on the consumer when Sainsbury’s are still stocking meat.*

**(England, 21, Female, Medium Engagement)**

Some more engaged participants levelled accusations of 'greenwashing', particularly against bigger brands. The term 'greenwashing' was used to suggest a brand was overemphasizing their sustainable practices in contrast to their wider business impact, or finding 'loopholes' to appear more environmentally friendly, such as carbon offsetting. This accusation reflected a sense that these brands would primarily profit from 'unsustainable' practices, such as mass consumerism and animal farming, and therefore have a vested interest against sustainability movements.

On the other hand, others, particularly less engaged participants, argued larger brands were less likely to risk deception or exaggeration in advertising as they invested more in protecting their brand reputation. As understood by these audiences, the high reputational risk a big brand takes on from misleading consumers would likely be great enough to create a rigorous validation process of and compulsion to follow through on any environmental claims.

*I would just trust that, because it's published to the website, I could take their word for it.*

**(Wales, Female, 34, Medium Engagement)**

## 5. Claims, terms and imagery in advertising context

*There was a general belief that environment-related food claims made in ads were verified, though expectations varied depending on the type of claim made (i.e., whether a claim was broad or specific; whether terms used were familiar; and whether imagery and visuals played a part). The use of claims/imagery could lead to a cascade of associations even if those words were not explicitly mentioned in the ad itself, which could lead to wider assumptions about the brands' environmental credentials.*

### Expectation of regulation can vary depending on the specificity of the claim

Participants across groups assumed there would be some regulation of the overall claims, but that the degree or stringency of regulation would differ across claim type or specificity.

- **Broad claims**, such as 'good for you' and 'balanced', tended to be accepted at face value and were less likely to be challenged by participants. Once the researcher began to question their understanding, participants expressed the feeling that these sorts of claims would be too general or vague to be regulated. This led some to suspect that these broad claims could be a brand's way of making stronger implicit claims without having the impetus of providing evidence. For some, broad claims such as Birdseye's<sup>4</sup> "all the scientists" could fall between vague and verifiable and elicit stronger pushback from sceptical audiences.

*You're saying it's good for the planet. Who said so? You're just saying 'the scientists', but how are we sure the scientists are right? [Bird's Eye ad<sup>4</sup>]*

**(Scotland, 34, Female, Medium Engagement)**

- **Familiar terms**, such as 'sustainable', were assumed to be somehow regulated, though the parameters for meeting that regulation were largely unknown and unquestioned. These terms, which have become generic for many as they show up frequently in everyday conversations and advertising contexts, are tricky to align expectations with, as they seem to encompass too broad a set of potential meanings. 'Sustainable', for example, could refer to supply chains, packaging, carbon emissions, welfare concerns, as well as several other possible areas of concern. In this way, many terms have become so encompassing, they've lost tangibility.

Other terms, such as 'plant based' and 'vegan', have clearer expectations and can be seen as more consequential to get wrong. Some participants expected (or desired) standardisation and regulation of 'plant based' and 'vegan' advertising in line with other dietary claims, such as 'halal'. Others, however, acknowledged that vegetarians and vegans have grown used to investigating food claims because of past missteps, and are unlikely to be tripped up by misleading or misused terms where other information regarding the production and cooking process is available. A frequent example of this was the sense that vegans would know to check if the Burger King 'plant-based' Whopper<sup>7</sup> could be cooked on a grill that would have been contaminated by meat products.

*I feel like if a brand says organic or sustainable, I'd believe them. They probably did have to prove it.*

**(Northern Ireland, Female, 17, Medium Engagement)**

*Plant-based means anything made from plants. It's a handy shorthand for knowing something is 'safe' to eat as a vegan.*

**(Scotland, Male, 34, Medium Engagement, Vegetarian)**

*I think what they're [Burger King<sup>7</sup>] trying to do is trick people. But I think vegans have learned not to be tricked for a long time.*

**(England, Male, 31, Low Engagement)**

- **Data and technical terminology** were perceived as the clearest claims and, therefore, requiring the strictest regulation. Scientific papers and statistics were perceived as more verifiable and could thus instil a stronger sense of confidence in the accuracy of a claim. However, the technical language latent in such claims could also risk switching some audiences off, particularly those who are less engaged. Terms such as 'GHG' and 'COP26' (Oatly<sup>17</sup>) could come across as technical and end up confusing participants. Similarly, difficult to comprehend statistics, such as '253.37 miles greenhouse gases' (Hain<sup>20</sup>) create an emotional barrier for engagement due to the perceived intangibility of the measurement. Most participants reported having a weak understanding of how much energy, water or carbon would be considered typical or acceptable for a given product, such as a pint of milk. Measurements of these factors could be difficult for respondents to understand, or even care about.

*I don't get with the fish still splashing... and the bathtubs of water. I'm not getting that. Is it for the fish? [Hain Frozen Foods Ltd ad<sup>20</sup>]*

**(Scotland, 34, Female, Medium Engagement)**

*If there isn't a source, I don't believe it or disbelieve it, I just think that's something they're saying. But there could be some instances in which, if it is just a made-up claim, it could harm somebody.*

**(England, 31, Male, Low Engagement)**

These technical terms and descriptions can also appear intimidating to less engaged audiences, who do not identify strongly with environmental activism. Brands that heavily market their environmental ethos can appear misaligned with a less engaged consumer's priorities, and therefore would be expected not to cater to their wants or needs. Such an example came up with Hello Fresh<sup>31</sup>, who, by offering some plant-based meal options, were assumed by some to be an entirely vegan brand. Further, claims perceived to vilify a participant's lifestyle choice, such as the choice to eat meat, could cause cognitive dissonance by challenging the participant's own moral code and risk disengagement altogether.



### Environmental claims can lead to a cascade of associations

The use of certain claims within ads could trigger respondents to project their own blizzard of implied terms or claims not explicitly made. Certain terms, such as 'natural' or 'plant based', could spontaneously elicit assumed secondary claims, such as a product being 'carbon neutral', 'organic', 'sustainable', or 'locally sourced' (e.g., Belvoir Farm ad<sup>5</sup>). Broad claims involving environmental practices could suggest wider brand action, including sustainable waste disposal, ethical supply chain practices and carbon footprint reduction. On probing, respondents were aware that these claims were not being explicitly made and that therefore the brand should not be held liable in the event the assumed claims were untrue. This projection may be necessarily linked to the belief many respondents had that those brands wanting to 'do good' in one area would likely extend this ethos across the spectrum of their business, suite of products and individual product lifecycle.

*Plant based always implies better for the environment ... ads can take advantage of that.*  
**(Northern Ireland, 25, Male, Medium Engagement)**

*[Belvoir Farms] 'Crafted with nature'... So, you think of natural, organic products.*  
**(Northern Ireland, Male, 30, Low Engagement)**

Additionally, a respondent's preconceived understanding of certain terms could impact their beliefs about a given product. Many respondents viewed 'plant based' or 'meat free' as inherently healthy and formed from natural foods. There were some vegan and vegetarian participants who were aware that certain meat alternative products could be heavily processed, though these were not the majority.

### Visual imagery plays a role in evoking assumptions

Visual imagery could also evoke assumptions about environmental, animal welfare and health claims. Images of produce which appeared 'fresh' could elicit beliefs in much the same way that terms such as 'natural' or 'plant based' could. Fresh fruit and vegetables could suggest to some to be organic, carbon neutral, sustainable or locally sourced. When visuals of fresh fruit and vegetables were paired with environmental claims, some participants jumped further to assume the product being advertised was necessarily plant based (even when on-screen text contradicted this, such as within the HelloFresh advertisement<sup>31</sup>).

Farming imagery, such as fields, animals, farmers or fisherman could create trust with viewers by evoking a sense of relatability and nostalgia. British rural farming could evoke a sense of the bucolic idyll by referencing small farming practices with low factory usage and high animal welfare standards. This became particularly evident when participants saw images of landscapes or rural scenes they could directly place in their local vicinity, such as local landmarks (e.g., Northern Ireland Farm Quality Assurance ad for those based in Northern Ireland<sup>29</sup>).

For many, advertising images depicting animal rearing and farming practices could also imply a brand's animal welfare practices. Participants reported that an open field of livestock felt to suggest claims such as 'free range' or 'grass fed'. Participants who disagreed with animal farming, such as vegetarians and vegans, were more sceptical of the usage of this imagery – particularly in contexts involving narration and storytelling – as they felt it did not accurately portray the environmental and welfare impacts of animal products. Most of the meat eaters in the study, however, did recognise the imagery-based claims would be implicit, and may not necessarily be true unless explicitly stated.

*They are doing it in the right way... It looks good. The fields, countryside, it's all natural.*

**(Northern Ireland, Female, 49, High Engagement)**

*I'm not buying the little fishing boat ... I'm interested to hear more about the how. What steps are they taking.*

**(Scotland, Male, 34, Medium Engagement)**

### **The colour and word *green* can evoke environmentalism and veganism**

*Green*, both as a colour and a word, was reported to be powerfully evocative of environmental and plant-based themes. Much like 'plant based' and 'local', *green* can evoke associations of 'healthy', 'fresh', 'organic' and 'sustainable (e.g., Bird's Eye 'Green Cuisine' ad<sup>2</sup>). To participants, *green* can signal a brand's environmentally conscious ethos without explicitly making any claim, leading participants to believe the brand in question must be 'doing their bit'.

*Green* can also carry associations of veganism or vegetarian alternative foods, such as alternative meat products. In cases where *green* seems to signal veganism, other potential implications are largely overridden by the consumer's predetermined sentiments toward vegan/vegetarian alternatives (which may still resemble those of the colour/word *green*).

*You relate the colour green to vegetables and plants and stuff. If it was a different colour, you'd find it a bit strange. When you think of vegetables and stuff you think of the colour green.*

**(England, Male, 31, Low Engagement)**

Case studies set out in Appendix 7.1 provide examples of these findings in the context of specific ads used as stimulus in the research.

## 6. Conclusions

*The power of environmental claims and terminology in food and drink advertising lies in their uncritical acceptance and the 'halo effect' such claims have on brands. However, although the impact on brand image can be considerable, nutritional impact, habit/taste preferences, and occasionally affordability, have a more direct impact on purchase behaviour.*

### **The power of environmental claims, terminology and imagery lies in uncritical acceptance**

Environmental claims, terminology and visual imagery can have a strong unconscious impact on consumer's perception of a given brand. Unlike nutritional claims, these claims tend to be accepted uncritically and without conscious recognition, as they often have little bearing on purchase or lifestyle decisions. Further, consumer understanding of the causal connections between a given product and the environment can be complex and indirect. Nutritional claims, on the other hand, are often strongly connected to purchase and lifestyle motivation, and can therefore face greater scrutiny and calls for regulation. Participants felt more personally impacted by the nutritional quality of the products they consume, given its personal and direct impact on their bodies.

Consumers tend to assume there is strong regulation across all advertising, and believe, ideally, that all terms and claims should be somehow policed. Though participants recognised the difficulty in regulating vague phrases, such as 'made with nature', these claims often evoked the broadest cascade of associated claims and may be at higher risk of misleading audiences. Similarly, conversations revealed strong associations between certain visual imagery and environmental and animal welfare practices.

### **Consumers support stronger evidence and regulation of dietary, nutritional and environmental claims**

There is a strong consumer desire for stringent regulation across the advertising spectrum, particularly regarding explicitly stated claims. Though this sentiment extends broadly, there were several priority areas in which consumers desired particularly stringent regulation. These areas are:

- **Green visuals/imagery and terminology such as 'natural'/'fresh'** which have an overall halo effect, evoking assumptions about environmental credentials. With these features having the potential to imply wider environmentally conscious practices, there is some consumer appetite for stricter regulation on imagery in ads.

Vegan and vegetarian consumers mentioned animal rearing and farming imagery. There is a belief that images of open pastures and line-and-pole fishing risk misrepresenting the actual farming practices and environmental impact of certain brands. This belief found some support in the research, revealing an association between images of this kind and other environmental attributes and implied claims, such as 'natural' and 'local'.

- **Comparative environmental impact claims** across like-for-like products, such as an 'alternative chicken' product compared to an equivalent amount of chicken. Consumers desire comparative information across a given product lifecycle, including the supply chain and waste disposal. Preferably, this would show up on packaging or other point-of-purchase locations, such as on websites.

- **Comparative nutritional information** across alternative products, such as vegetarian 'meats'. Similar to comparative environmental claims, this would ideally come in the form of like-for-like comparisons. Consumers did understand, however, that this information would not necessarily need to be conveyed in the ad itself, but perhaps made available on the product website.
- **Nutritional claims**, such as 'healthy', 'good for you' and 'balanced'. Due to the vagueness of many of these claims, coupled with the importance nutritional quality carries for consumer purchasing decisions, nutritional claims should be examined with particular scrutiny.
- **'Preachy' ads**, particularly in the cases of vegetarian and vegan brands. Though consumers understand the marketing purpose of these ads, there was a feeling that such ads should be held to a higher status of accountability regarding the claims made, particularly in cases where the brand criticises a common lifestyle or diet (such as eating meat).

Finally, there is a further desire for standardisation and regulation of terminology, such as 'natural' and 'sustainable', as consumers may struggle to compare claims across brands where definitions are largely to the discretion of the corporate body.

## 7. Appendixes

### 7.1. Case studies

#### 7.1.1. Burger King<sup>7</sup>: Using 'plant-based' felt misleading



The Burger King ad promoting a Plant-based Whopper and a Vegan Royale<sup>7</sup> earned the highest and most frequent criticism from respondents, who largely believed the use of the term 'plant-based' connotes misleading advertising given the preparation of the burger includes meat contamination. The qualifying text at the bottom of the ad read, 'The Plant-based Whopper is plant-based, however it is cooked on the same broiler as our original Whopper to deliver the same unique flame-grilled taste'.

Respondents referred to several explicit and implicit claims on the ad which would lead them to believe the Whopper would be suitable for vegan, vegetarian and halal diets, including:

- The use of 'plant-based', which many respondents assumed would be synonymous with 'vegan'
- The colour green, which many respondents equate with veganism
- The Whopper appears beside a 'Vegan Royale'
- There is a vegan symbol near the bottom, which respondents assumed would refer to the entire advertisement (as the nearby Burger King symbol appears to do)

The information referring to preparation was only available in the qualifying text at the bottom of the advertisement, which participants felt may be overlooked by some consumers.

When probed, respondents believed the term 'plant-based' should only refer to the product as it is received by the customer, not prior to any preparation or processing that would be considered necessary to the product's consumer value (in this case, cooking the burger patty to be safely eaten and enjoyed).

However, some respondents pointed out that vegans and vegetarians would know to ask about the cooking process prior to purchase, and therefore be unlikely to end up buying a product without fully understanding this preparation. Though this may be true, respondents did not feel such alertness *should* be required by meat-free audiences to avoid being misled. Further, individuals following other diets, such as halal, may not know to be so cautious and therefore risk ingesting foods that do not align with their preferences.

*I feel it's misleading, it gives me a really negative impression of Burger King as a brand.*

**(England, Male, 31, Low Engagement)**

*The key information, that, to my knowledge, all vegans would want to know, is at the bottom and small. They have not lied, but they have tried to hide the truth at the bottom ... there's clearly nothing saying the text has to be the same size as the claim that says it's vegan.*

**(England, Male, 31, Low Engagement)**

### 7.1.2. Belvoir Farm<sup>5</sup>: Imagery created a brand halo effect



The Belvoir Farm ad for their Non-Alcoholic Lime & Yuzu Mojito<sup>5</sup> drink triggered a high level of associations – resulting in a strong brand halo effect – given its relatively generic claims and imagery. Phrases on the advertisement, such as ‘crafted with nature’, and ‘made & bottled on the family farm’, were felt to imply several other environmental and health claims, such as:

- Organic, pesticide-free
- Local, fresh product
- Sustainable
- Natural
- Low-chemical or chemical free

Further, the green background featuring ripe fruit supported the belief that the drink would be a ‘fresh’ and ‘natural’ product. This was seen to further enforce the above claims, suggesting the drink would be environmentally friendly and healthier than comparable alternatives.

The relatively small company size also buoyed the perception that the company would have a low environmental impact, and that their messaging is more likely to be sincere, truthful and permeate throughout their business practices.

*It's lemons and limes -- how many lemons and limes are growing in this country?!*

**(England, Male, 34, Low Engagement)**

### 7.1.3. Vivera<sup>18</sup>, Oatly<sup>17</sup> and Linda McCartney<sup>20</sup>: Technical data and terminology felt overwhelming

All three vegan and vegetarian brands Vivera<sup>18</sup>, Oatly<sup>17</sup> and Linda McCartney<sup>20</sup>, advertised on social media posts using technical data or terminology. These forms of messaging could obfuscate consumer understanding, particularly in cases where consumers are not primed to respond positively to the product, such as in the case of individuals with meat-inclusive diets.

The use of statistical data, particularly when it involved large or complex numbers, could be difficult for respondents to comprehend, and risk them turning off altogether. Examples or comparisons could help, such as Vivera’s ‘600x showers’, though such a high quantity of a generally unmeasured example as this could impede further comprehension. Further, respondents may still find it difficult to understand what the broader environmental impact would be and why it should matter to them, particularly regarding water consumption and land usage. In some cases, where several complex statistics were shown at once, respondents would switch off immediately, not wanting to engage at all.

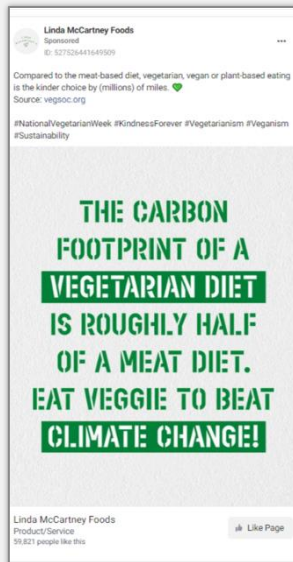
Certain terminology, particularly when technical, can feel unfamiliar and daunting to respondents. ‘GHG’ (greenhouse gases) and ‘COP26’ (2021 United Nations Climate Change Conference) were both terms which some participants may have come across before but would not feel confident defining or engaging heavily with. Other phrases, such as ‘#PlantBasedPositivity’ could be heavily associated with vegan and vegetarian messaging and risk switching off those with meat-inclusive diets altogether.

*I think that [Oatly ad] is implying that you kind of know stuff already about the subject matter and that you are concerned, engaged and willing to absorb information about the subject matter.*

**(England, Male, 54, High Engagement)**



#### 7.1.4. Hain Frozen Foods Ltd<sup>19</sup>; Linda McCartney: ‘Preachy’ tone considered off-putting



Certain brands – particularly vegetarian and vegan brands – that are seen as promoting a lifestyle by admonishing another, risk damaging their image as well as their message by coming across as ‘preachy’ and potentially offensive.

Many respondents, including vegetarians and vegans, have some association of environmental activism with disruptive or harmful behaviours. Several respondents spontaneously mentioned specific campaigning groups, whose environmental messaging they have come to associate as ‘preachy’, unreasonable and, in their view, unworthy of the harm they have caused.

Ads that are seen to reflect the message and tone of these groups, therefore, risk disengaging audiences entirely and potentially causing further harm to the environmental movement. Many vegans and vegetarians agreed with such a sentiment, and felt such advertising went against their own interests.

The Linda McCartney social media ad<sup>19</sup>, which reads (in block and bold letters), ‘The carbon footprint of a vegetarian diet is roughly half of a meat diet. Eat veggie to beat climate change!’ was felt by many to be both ‘preachy’ and patronising, suggesting vegetarians and vegans are inherently better people than meat-eaters. Participants who ate meat were largely disengaged and, in some cases, offended by the messaging.

*I just think, I wouldn't read that. We did meat free Mondays for a while and I just think, I don't need all those facts and figures. For me, I feel like some of it's a little bit shouty. I'm going to do whatever I want to do really.*

**(England, Female, 54, Medium Engagement)**

*The activists ... all of these extreme activists who have been shutting down motorways, damaging art pieces and historic buildings. When I see climate change, I fortunately, now, think of those types of individuals. And it sometimes does have the ability of having me think negatively of it. So, I sometimes wonder if those brands are trying to reverse those feelings of climate change ... because of all of this horrible negative press, and all of this harm, in my opinion, that people have been doing, and obstruction, I think people's opinions have slowly changed toward climate change. And this is an attempt to reverse that.*

**(Wales, Female, 34, Medium Engagement)**



### 7.1.5. Marine Stewardship Council<sup>15</sup> and ADHB<sup>25</sup>: Vegans and vegetarians found 'natural' imagery misleading



Some ads by meat and dairy brands and organisations, such as the Marine Stewardship Council<sup>15</sup> and ADHB (Agriculture and Horticulture Development Board)<sup>25</sup>, involved heavy emphasis on natural imagery, which could be seen by some – particularly vegans and vegetarians – as potentially misleading as to the actual landscapes and practices from which their products are derived.

Ads for both advertisers included imagery suggesting naturalism, such as open fields or open oceans, which seemed to some to suggest environmentally sustainable practices. Further, imagery of certain rearing practices, such as cows grazing in a field or pole-and-line fishing, could be seen to imply animal welfare practices as well. Identifiability or claimed locality (such as regional accents or 'British Farmed') could be felt to imply health benefits, as many respondents associate 'local' with a sense of 'better for you'.

Many vegans and vegetarians viewed these associations as implied claims. Further, they believed that, especially when untrue, these implied claims could be dangerous by allowing people to believe they are 'doing their bit' or not partaking in potentially harmful activities. These respondents felt that, by believing the meat purchased would be local, have a low environmental impact, and follow ideal animal welfare practices, an individual could feel free from the responsibility to monitor their behaviours by feeling they have 'done enough'.

Those who eat meat largely enjoyed the ads and reported understanding that none of the 'implied' claims were necessarily true. However, the broader research found that the imagery in these advertisements could create a large cascade of associations, suggesting some grounding to the belief that imagery and storytelling could play a role in respondent understanding of rearing and farming practices.

*I'm not familiar with that company but as they're doing TV ads, I'd assume they are quite a big company. So, they are not doing little local fisher boats. It's unattainable. It just seems very fake ... I feel like with the storyline they can probably get round it as a pitch. I don't know if it's been individually checked.*

**(England, Female, 21, Medium Engagement, Vegetarian)**

*I've come to an acceptance that slightly misleading information used to sell a product appears to be acceptable.*

**(Wales, Female, 34, Medium Engagement)**

*I highly doubt they put the fish back. I've heard that companies can buy that sticker.*

**(England, Female, 21, Medium Engagement, Vegetarian)**

## 7.2. Stimulus table

Appendix number	Brand	Media	Terms	Description
1	Oatly	Social Media, website (own site)	Plant-based claims	<p>Ad featuring animated imagery explaining key facts and figures from 'Oatly's Sustainability Report, 2021'. The ad explains that Oatly's company footprint has increased by 77% due to the growing demand for their products, and related growth in factories and employees, but claims that it is part of their 'original plan' as they are helping consumers move to a plant-based diet which they claim is better for the environment.</p> <p>Accompanying web page explains Oatly's 'Three Pillars of Action' to: 'Drive a Food System shift'; 'Set the example as a future company'; and 'Lead the charge to empower a plant-based revolution'.</p>
2	Bird's Eye	National press	Use of colour/imagery/visuals	Bright green ad with a logo at the top which says 'Green Cuisine, powered by plants'. Ad features photos of two Bird's Eye plant-based products: meat-free sausages and fishless battered fillets. The ad claims 'Making meat-free mealtimes easy with our new family favourites'.
3	Belvoir Farm	Television	Use of colour/imagery/visuals	Imagery of rolling countryside hills and blue skies, and a woman cycling. The video shows images of Belvoir employees making drinks in the countryside, claiming they do things '... the proper way, not the easy way. Planting thousands of trees and acres of wildflowers and picking elderflower with the locals'. Voiceover states their '... drinks change colours with the seasons because so does fruit.' Includes images of fresh fruits, wildflowers and beehives with the closing line, 'We love the wild here, and you can taste it in every sip. Belvoir farm, welcome to our wild.'
4	Bird's Eye	Social media	Use of colour/imagery/visuals	Animation of a young girl and her dad sitting on a bench, against a backdrop of green countryside with an animated rabbit. The girl is educating her father on Bird's Eye's plant-based products, including that '... they're really nice and they're better for the planet...' to which the dad responds, 'I'm not sure how much difference it makes really.' The girl responds, 'Do you think you're more cleverer than all the scientists in the world, or are you just avoiding the whole thing because life's too complicated as it is?' The dad does not know how to respond, and the ad ends with 'Welcome to the plant age'.
5	Belvoir Farm	Press	Use of colour/imagery/visuals	Ad showing a picture of a Belvoir bottle of 'Non-Alcoholic Lime and Yuzu Mojito' against a backdrop of animated limes and lemons on a green background. The ad claims the product is 'Made & bottled on the family farm. Zero waste to landfill. 100% recyclable packaging. 10,000 trees planted'. A badge also indicates the product was 'crafted with nature'.

Appendix number	Brand	Media	Terms	Description
6	Vivera	Social media	Plant-based claims	A young girl gets on her bike and cycles through a forest to a Vivera factory. She interviews the Vivera CEO, sharing her concerns about climate change and asks 'How does Vivera itself plan to make a positive impact?' The CEO states he shares her concerns, and that they are helping by making 'delicious' foods, so more people eat Vivera, replacing 'animal protein with plant-based protein', they are 'reducing plastics' and sourcing products from 'responsible areas.' The ad ends with a shot of the girl getting into a lorry transporting Vivera products.
7	Burger King	Press	Plant-based claims	Pictures of two Burger King products, the Plant-based Whopper and the Vegan Royale, against a green backdrop. The ad features a 'vegan' symbol. There are asterisk symbols next to the names of both products, with the qualifying text 'The Plant-based Whopper is plant-based; however, it is cooked on the same broiler as our original Whopper to deliver the same unique flame-grilled taste'. It also states, 'Vegan meals are served with fries and bottled water'. Any modifications could result in a non-vegan meal.
8	Tesco	Television, social media	Plant-based claims	<p>A young woman sits on her sofa watching a programme which states, '...the planet is continuing to warm.' Staring straight into the camera, she gets ready to take a bite out of her burger as the camera zooms and the voiceover claims, '...that's not what Zoe likes to hear, but she's going to roll up her sleeves and do her bit ... there it is, a delicious Tesco Plant Chef burger.' The ad claims that '... a little swap can make a big difference to the planet. Tesco, every little helps.'</p> <p>A Tweet from the Tesco account, linked to the ad, explains they have lowered the price of their Plant Chef products and claims 'Good for your pocket, even better for the planet'.</p>
9	Sainsburys	Television, radio	Plant-based claims	<p>The camera pans over a grey landscape which looks like space with a dramatic voiceover suggesting, 'People of Earth, if trying to eat better feels too hard, try your Halfest.' The ad then shows multiple screens of people cooking meals consisting of half meat products and half plant-based products. The ad claims 'a chop here, a change there and we'll help our health and planet.' Closing frame shows a stamp stating the Sainsbury's is a Principle Partner of the UN Climate Change Conference 2021. Qualifying text reads 'Research shows eating in line with UK dietary guidelines will be better for the planet than the current average UK diet'.</p> <p>The radio ad, as part of the same campaign to promote combining meat-based products with plant-based products, focuses on the benefits of eating chickpeas with the line, '...better for you and better for the planet.'</p>

Appendix number	Brand	Media	Terms	Description
10	Meatless farm	Website (own site)	Sustainability	Meatless Farm website pages about the 'Future of Food', promoting their 'Meatless Farm products, lovingly made from plants'. Includes videos about educating children about 'sustainable eating' and launching their 'Plan-eat report' with the stat that 'Over a third (33%) of British Families believe sustainable living is unachievable'. Their 'Big 4 commitments' for 2023 include educating children about sustainable eating, labelling products with their environment impact, making packaging recyclable and compostable, and identifying the carbon footprint of their team.
11	Finnebrogue Naked	Television	Sustainability	A woman walks out of a shop carrying flowers and makes her way home while talking directly to the camera. She explains that she wants to make changes in the world but does not associate with several groups (including activists, scientists, politicians and superheroes) and that her way of making a 'change' is by eating 'Naked' who claim to make nutritional food 'in the most sustainable way they can.' She explains 'they're not perfect...but they are hungry to do more.' At home, she walks into the kitchen where her partner is cooking Naked sausages, and her child is sitting at the table. She explains that she is a mother and a vegetarian but that while her partner is not, '... so what? Together, if we change the way we eat, we can begin to do something good in the world.'
12	McDonald's	Television	Sustainability	The McDonald's voiceover speaks over different imagery of British farming, including cows and chickens, picking potatoes, driving a tractor, and planting trees. Includes images of various farmers and claims McDonald's have invested millions in British and Irish farms which has helped '... set them up for a more sustainable future.' It finishes by stating '... what started small, turned into something much, much bigger. Because when you change a little, you change a lot.'
13	Riso Gallo	Press	Sustainability	A photo of a pack of Gallo risotto is placed against a watercolour of a farm with rolling mountains and wheat. The heading claims 'Riso Gallo. The sustainably farmed Maestro of Risotto'. Qualifying text claims their rice is '...sustainably farmed in Italy, in packing suitable for recycling...'
14	Argento	Press	Sustainability	Image of a bottle of red wine in the forefront. The backdrop shows a vineyard in the sun and a mountain in the background. The headline claims '#1 Organic Wine Producer in Argentina' and the ad claims it comes from 'Naturally Organic and Sustainable Winemaking'. Further writing reads '#1 Organic Malbec in the world', and three logos for 'certified sustainability', being organic and 'vegan' are displayed.

Appendix number	Brand	Media	Terms	Description
15	Marine Stewardship Council	Television	Sustainability	Opens with imagery of a small fishing boat going out to sea in rough waters. The voiceover explains in a dramatised tone the tough conditions fishermen work through. It shows the fisherman going through what they catch and putting small fish back. It claims '... when we look after the ocean, the ocean looks after us. When you're shopping for your fish, look for this label' – with a shot showing the 'MSC: Certified Sustainable Seafood' logo.
16	THIS	Website (own site)	Broad claims (e.g., 'good for you', 'good for the planet')	'Why THIS?' part of the 'THIS' website which shows various graphs comparing the environmental impact of THIS products to beef, chicken and pork. It includes a large image of a THIS piece of meat alternative with the words 'I mean... just look at it. THIS is a game-changer'. It also includes various claims about the nutritional benefits of THIS, such as being fortified with Iron and B12, high in protein and high in fibre. They also claim 'THIS' has a longer shelf-life than meat to help reduce food waste and that it's 'good for the planet' as 'most' of their packaging uses '90% less plastic'.
17	Oatly	Social media	Broad claims (e.g., 'good for you', 'good for the planet')	A sponsored post features an animation of an Oatly 'CUP26' caravan with music in the background. The text promotes the Oatly van which will be serving free oat coffees and hot chocolates on a particular date. The ad claims 'science tells us that a third of global greenhouse gas emissions come from the food industry' but questions why food isn't on the main agenda at the UN Climate Change conference at COP26. They proceed by saying '...there is something you can personally do to bring those numbers down', encouraging the reader to 'swap cow's milk for oat drink...'.
18	Vivera	Social media	Broad claims (e.g., 'good for you', 'good for the planet')	A sponsored post with an infographic promoting the achievements of those who took part in Vivera's 'veggie challenge'. It claims that in taking part, '...you saved 66 m <sup>2</sup> of agricultural land, 36,000 liters of water...and 36kg of CO <sub>2</sub> ...you also saved two more animals...'.
19	Hain Frozen Foods Ltd	Social media	Broad claims (e.g., 'good for you', 'good for the planet')	A sponsored post for Linda McCartney foods features a plain background with large block-capital letters in green which read 'THE CARBON FOOTPRINT OF A VEGETARIAN DIET IS ROUGHLY HALF OF A MEAT DIET. EAT VEGGIE TO BEAT CLIMATE CHANGE'.
20	Hain Frozen Foods Ltd	Social media	Broad claims (e.g., 'good for you', 'good for the planet')	A sponsored post for Linda McCartney Foods features a reel of animated images claiming, 'One person doing Veganuary is saving 460.39 bathtubs of water, 31.65 fish still splashing, 253.37 miles of greenhouse gases avoided and 2.07 chickens able to cross the road'.

Appendix number	Brand	Media	Terms	Description
21	Hain Frozen Foods Ltd	Television	Broad claims (e.g., 'good for you', 'good for the planet')	As various images play, the voiceover talks about how it's always been 'Cool to be kind' and that 'kindness starts with all of us.' It then goes on 'We can be kinder to ourselves, to the world they inherit [images of children] and of course, to them [images of animals].' It shows various images of different people smiling and laughing and ends with 'Linda McCartney Foods. Kindness forever.'
22	Farmdrop	Outdoor	Broad claims (e.g., 'good for you', 'good for the planet')	A poster shows an animation of a woman holding lots of shopping. The headline states 'Help save the planet with your food shop'. The ad claims 'At Farmdrop, we deliver groceries in electric vans powered by 100% renewable energy (we're the only online supermarket to do this). And the majority of our glorious organic food is produced close to you using sustainable methods. So, your shop with us is better for you, and the environment'.
23	AHDB (Agriculture and Horticulture Development Board)	Press	Meat/dairy	Ad features an image of a (meat-based) stir fry against a backdrop of green countryside/farmland. The headline states 'Lean beef, pork and lamb naturally contain Vitamin B12'. Other claims made in the ad include 'Vitamin B12 contributes to the reduction of tiredness and fatigue' and 'Vitamin B12 is an essential nutrient not found naturally in foods of plant origin'. There is an option to scan a QR code for 'healthy recipes'.
24	Dairy Crest Ltd	Television	Meat/dairy	A young boy watches his father grate cheese and asks 'Dad, where does cheddar come from?' A cow sticks its head through the window and starts to explain how Cathedral City make their cheddar while showing the different stages in a comedic way– from earthworms to cow's milk, to cheese tasters and quality control. The voiceover explains the farmers '... make the cows comfy – a comfy cow makes milkier milk.' The father interrupts and says 'Cathedral City, Billy. Cheddar comes from Cathedral City.'
25	AHDB (Agriculture and Horticulture Development Board)	Press	Meat/dairy	Ad shows an image of a girl wearing wellies playing outside in the countryside. The heading states in big block capital letters 'ACTUALLY, THE GRASS ISN'T ALWAYS GREENER'. The ad reads 'British meat and dairy. It's true. Thanks to our weather, one of the best places on the planet to graze livestock and farm sustainably is actually right here in Britain. The carbon footprint of our beef, lamb and milk are lower than the global average. And we're committed to keeping them that way'. It includes a source for their claims in the qualifying text and 'We Eat Balanced' written on the side of the ad.

Appendix number	Brand	Media	Terms	Description
26	Arla	Television press,	Meat/dairy	<p>Imagery of cows in fields. The ad moves through frames of different farmers sitting or standing in different positions all singing 'Everybody's free to feel good'. Qualifying text claims 'All Arla C.A.R.E. cows have access to grazing as often as weather conditions allow and provided it will not compromise their health or welfare' and 'Protein contributes to the maintenance of muscle mass'. It ends with a voiceover claiming, 'At Arla Cravendale, all our cows are free to graze.'</p> <p>Press ad shows a farmer with a cow and the headline 'FREE TO GRAZE' next to a picture of a Cravendale milk carton.</p>
27	AHDB (Agriculture and Horticulture Development Board)	Television	Meat/dairy	<p>A young girl and older man stare into an oven where a shoulder of pork is roasting. The older man says, 'There's lots of goodness in there,' pointing to the oven, and then points to her milk and says '... and there.' The girl and older man are then transported to a countryside field where the girl asks, 'How does the goodness get in?' and as they travel across the field she asks if it's '... in the air ... or the rain ... or in what they eat.' They go back to the kitchen where the older man explains 'Actually, meat and dairy naturally contain Vitamin B12 which helps us get energy from food and stay healthy.' The young girl's voice closes the ad by voicing over 'Meat and dairy. Enjoy the goodness.'</p>
28	National Farmers Union	Social Media	Meat/dairy	<p>A Tweet from the National Farmers' Union shows an infographic with an animated carton of milk next to an animated carton of almond substitute. Above the carton of milk is the text '8 litres of 'tap' water to produce 1 litre of [milk]'. Above the almond milk is the text '158 litres of 'tap' water to produce 1 litre of [almond substitute]'. The Tweet states 'Choose British milk this #BackBritishFarmingDay'</p>
29	Northern Ireland Farm Quality Assurance	Television	Meat/dairy	<p>James Devine, an Irish chef walks through a field in the countryside. He explains that he likes to cook with Northern Ireland Farm Quality assured beef, as he looks for the 'very best red meat.' He explains he is on a journey to find out what makes this meat so special. Before asking viewers to join him to learn more, he states he's learnt about it being '... such a good source of natural protein, vitamins and minerals ...' and how '... Northern Ireland Farm Quality Assured beef is farmed with the environment in mind,' and their guarantee of world-class levels of responsible beef farming.</p>

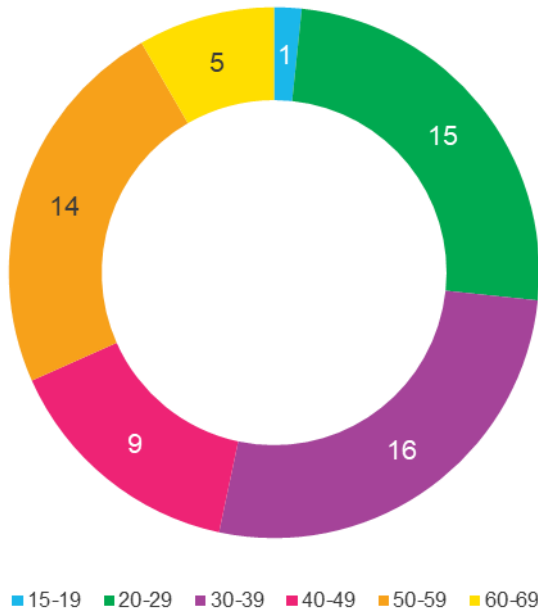
Appendix number	Brand	Media	Terms	Description
30	Wunda	Television	Other (including 'food miles', 'food waste' related claims)	As a man makes a coffee at home using Wunda milk, a cat emerges when it sees the milk and starts lingering, looking like it might approach to try and drink the milk. The voiceover asks, 'What makes Wunda so wonderful? Is it that Wunda is high in pea protein? Or that Wunda is a great source of vitamins and calcium? Or that Wunda is plant-based and not milk.' The cat is shocked and says, 'What!' The closing frame shows a carton of the milk with a superhero cloak on and the words 'Powered by Pea Protein!'. The voiceover stats 'Wunda tastes epic in everything.' Qualifying text states 'Protein contributes to a growth in muscle mass. Enjoy as part of a balanced and varied diet'.
31	HelloFresh	Website (own site)	Other (including 'food miles', 'food waste' related claims)	HelloFresh subscription page on their website features various images of fresh produce (e.g., salmon, vegetables, spices) as well as various recipes. Includes claims such as 'More taste, less waste ... HelloFresh customers waste 21% less food than those buying from supermarkets', and 'Balance your CO <sup>2</sup> footprint. HelloFresh is the first global recipe box company committed to offsetting 100% of direct carbon emissions, making us a great eco-friendly choice'.
32	Waitrose	Social Media	Other (including 'food miles', 'food waste' related claims)	Sponsored post with animated infographics shows stats around food waste with music playing over the top. The text reads 'Did you know that 70% of food waste in the UK happens in our homes – and that contributes to climate change? We waste 6.5 million tonnes of food a year, 4.5 million of which is edible. That's a shocking statistic – but we've got the power to change it. If we all buy just what we need and make sure we use it all up, together we can make a difference to climate change'. The video shows figures on waste (how many apples are wasted, how much water is wasted producing the apples), and ends with 'Partners against waste'.



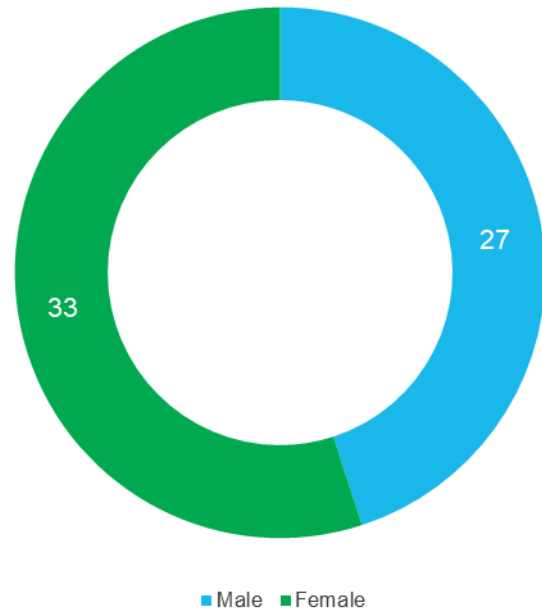
### 7.3. Sample breakdown

#### 7.3.1. Full study (Modules 1 & 2)

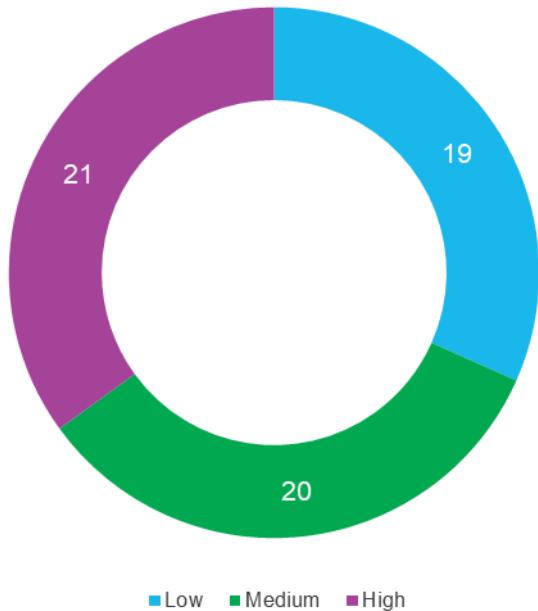
Age



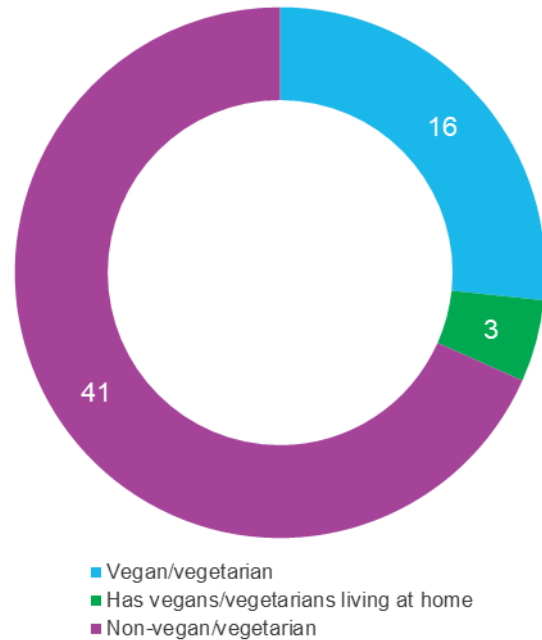
Gender



Environmental engagement



Dietary choice

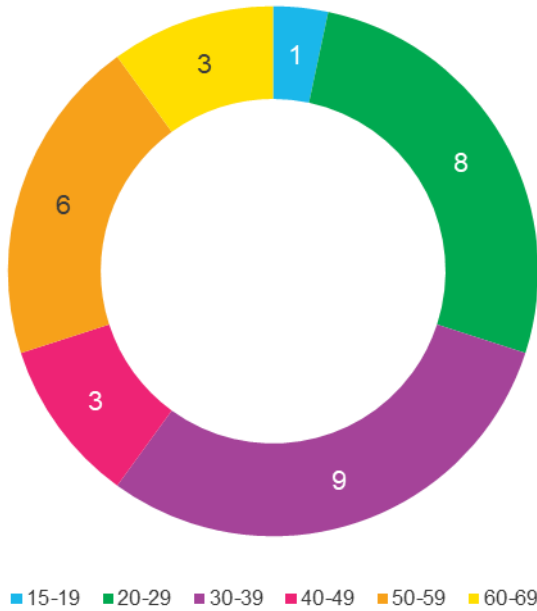


Respondents were asked their level of engagement and interest in Energy and Climate Change during the screening process – this was therefore self-defined.

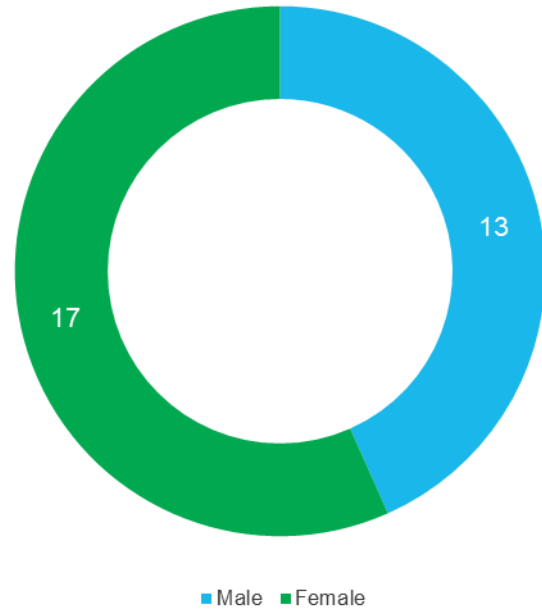
Respondents were asked their overall attitude toward food including a range of statements related to healthy eating and inclusion of animal products in their diet.

### 7.3.2. Food module only

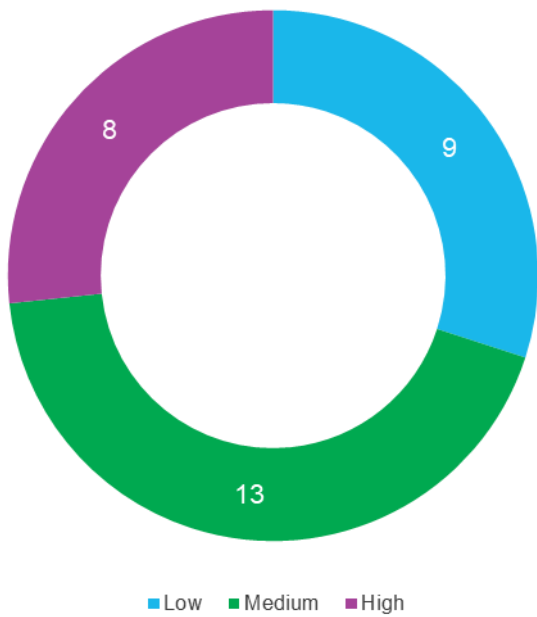
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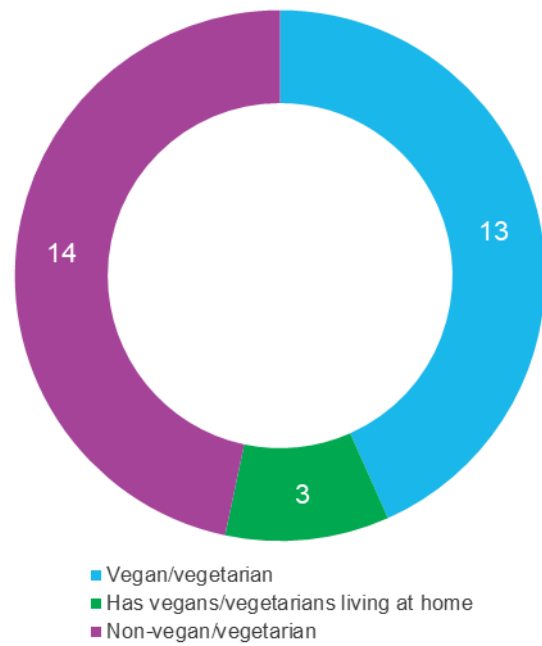
Gender



Environmental engagement



Dietary choice





# THANK YOU

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