

Belgium

## Lenneke Schils

Global Insights Director  
Consumer Panel YouGov

---

Living Consumer Intelligence | [business.yougov.com](https://business.yougov.com)



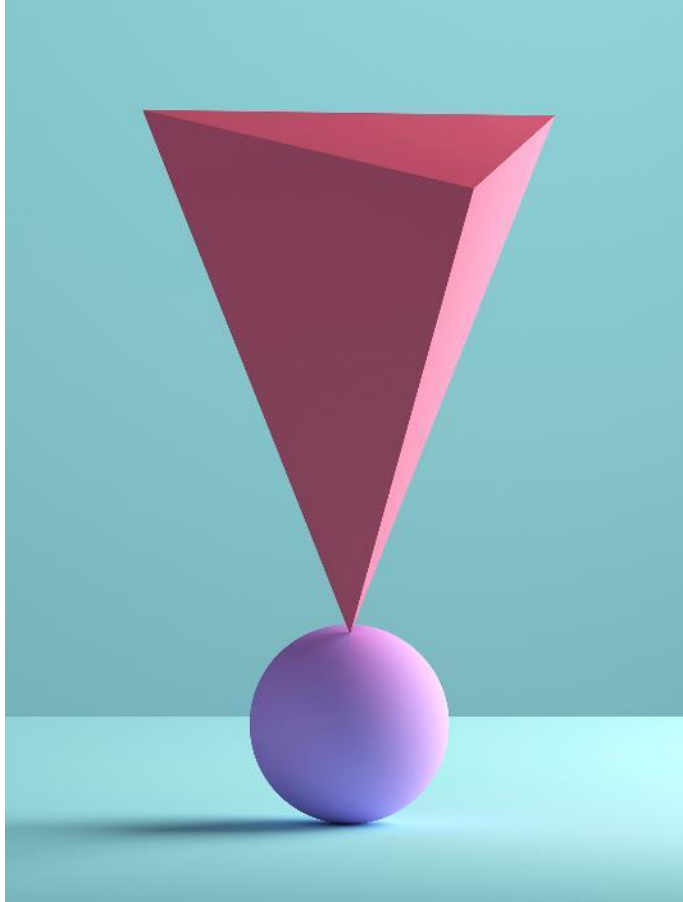


YouGov<sup>®</sup>

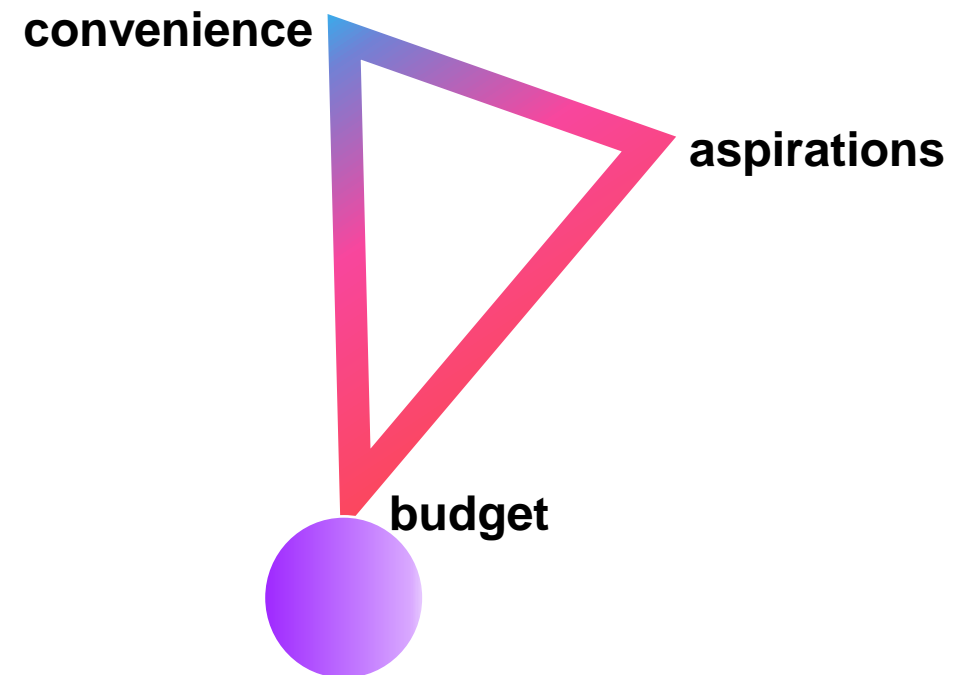
# Bridging the gap to buying better

---





## BERMUDA TRIANGLE







# Who Cares

Beliefs / Attitudes



Intention



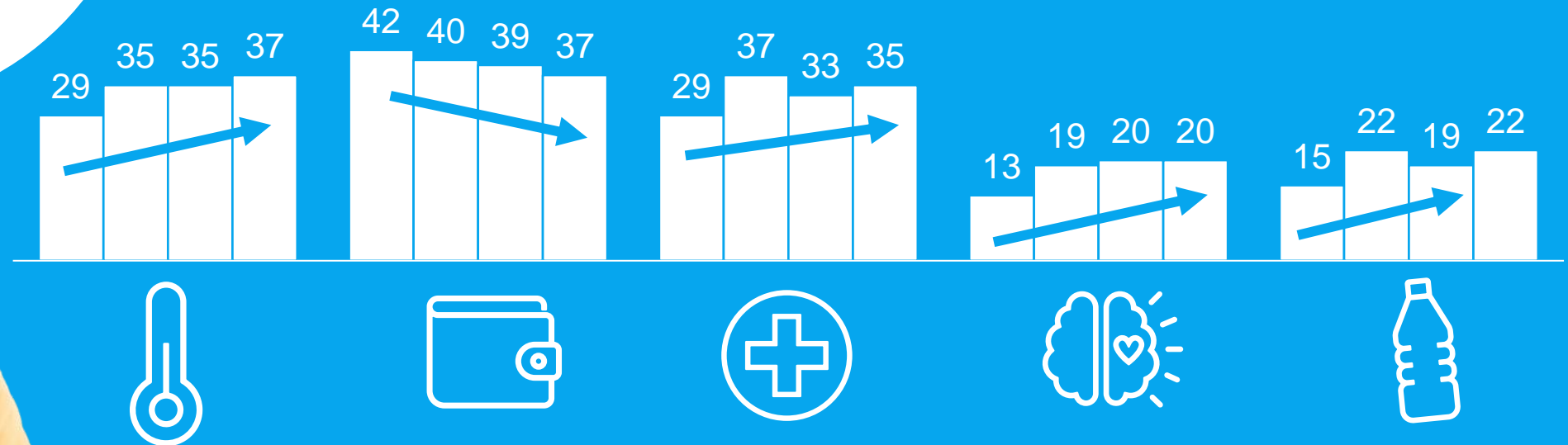
Behavior

# Who Does






































**As budget  
concerns  
stabilize, other  
concerns grow**

## 2 YEARS AGO TO TODAY Key societal concerns (%)

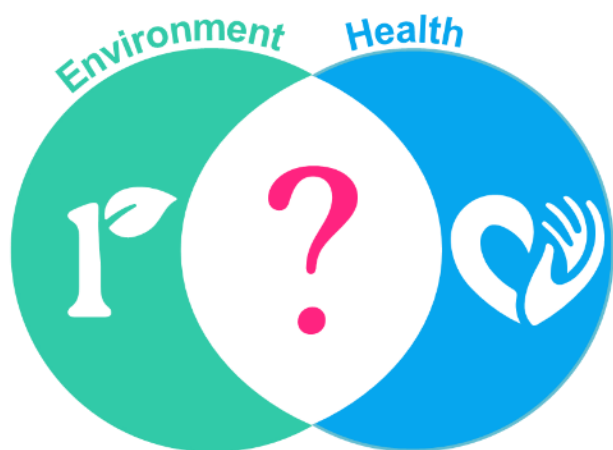


# Health trigger for meals and drinks; sustainability for home and personal care

## Main reason to change (purchasing) behavior

		#1	#2	#3	#4
	Breakfast				
	Main meal				
	Snacking				
	Drinks				
	Home cleaning				
	Laundry				
	Personal care				

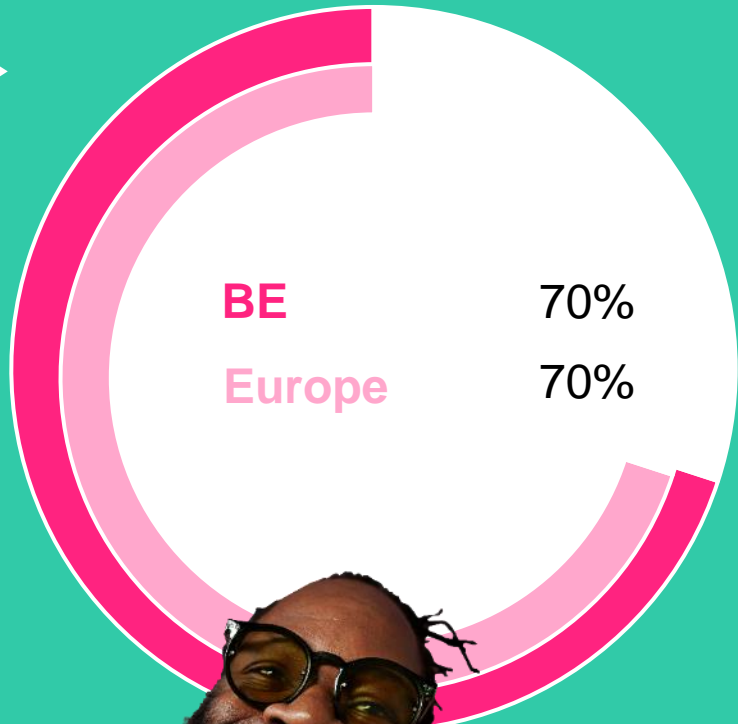
# Belgian shoppers (eco-) act





# “I’m doing well....”

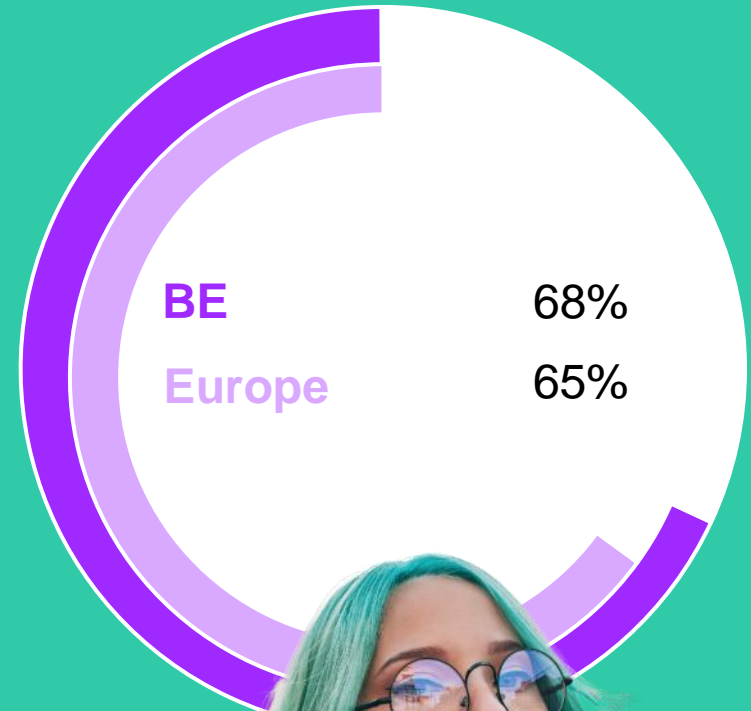
## Mentally



## Physically



## Sustainably



Source: WCWD BE '24

# Key environmental concerns

1 Climate change

2 Food waste

3 Plastic waste

4 Water pollution

5 Air pollution

---

WCWD BE '24 | % in top 3 Concerns

YouGov®



# Concerns and buying behavior converge

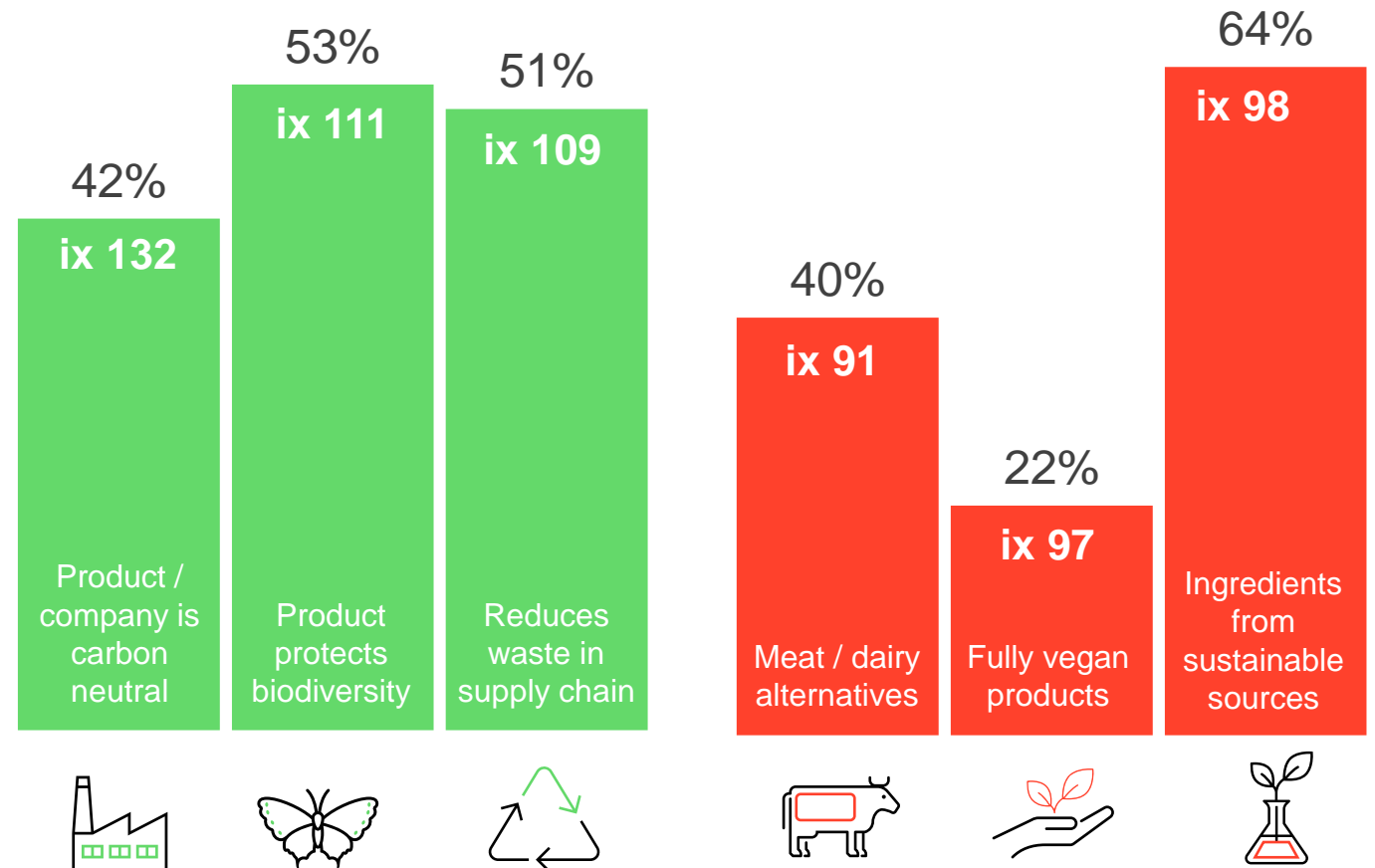
Products and companies that link with climate change and biodiversity are on the rise

Source: WCWD BE

% bought often / occasionally (ix versus last year)

• Fastest risers

• Biggest decline



# And eco-active buying behavior speaks volumes

Volume per buyer (yearly)

Carbonated Soft Drinks

136 L

236 L

Packaged Water

159 L

297 L

Plantbased Dairy

96 L

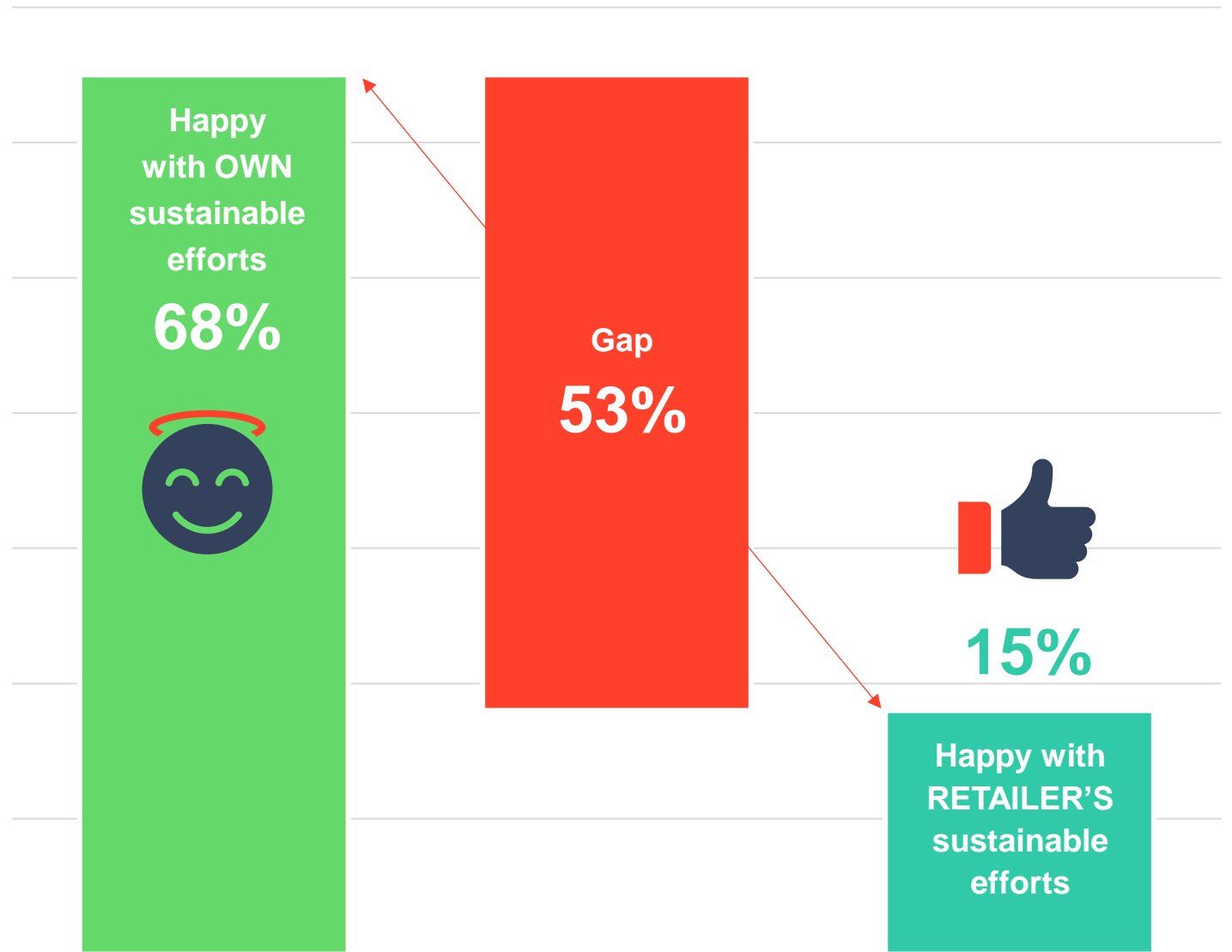
96 L



YouGov®



# Fulfillment gap





# Key health concerns

1

**Insomnia**

2

High blood pressure

3

Dementia

4

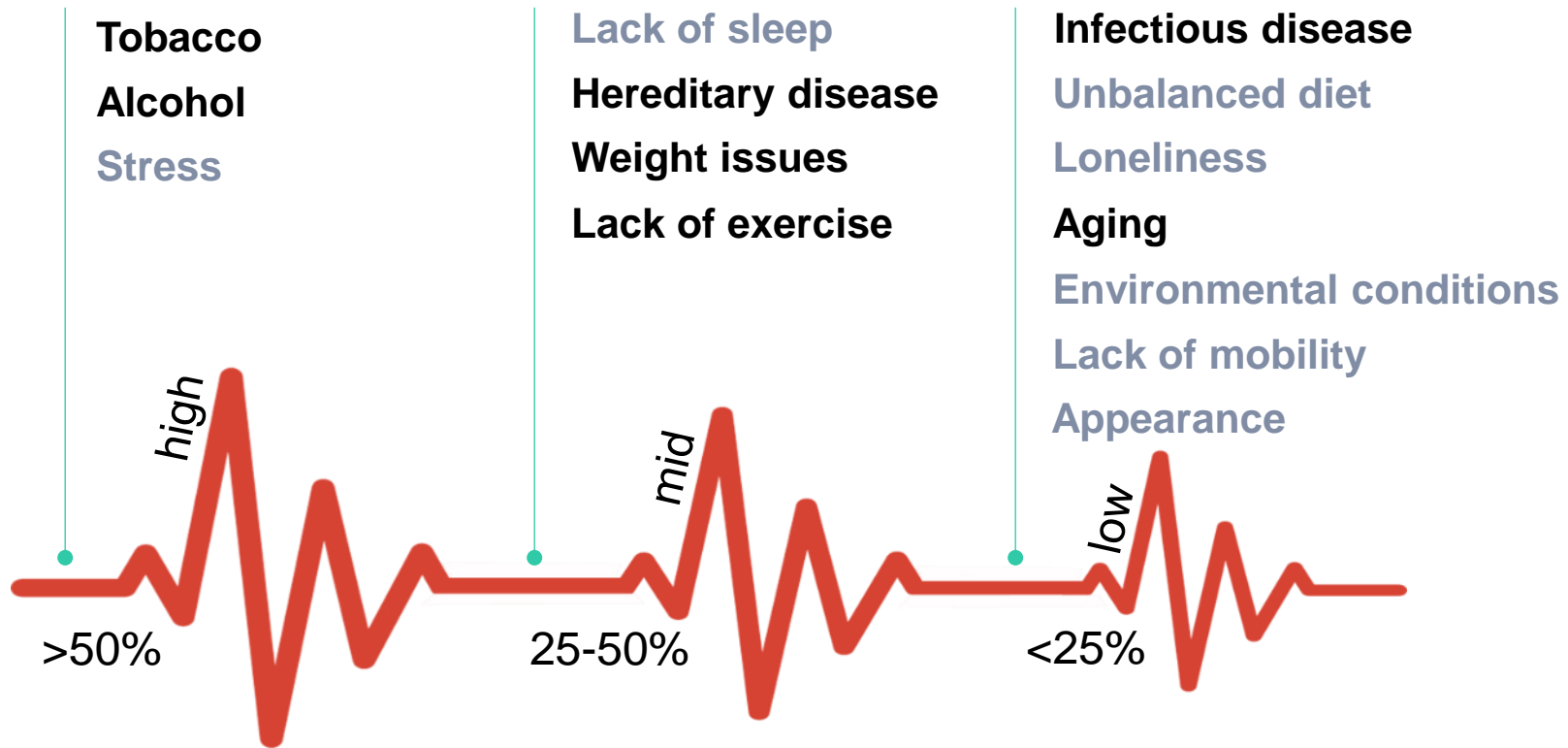
**Burn-out**

5

Diabetes



# “Classic” view of health factors



# Top 10 activities to maintain a healthy weight

It's all about the small picture





# Treats are a part of the good life

## Belgians snack more thoughtlessly

**70%** (61%)

*"It is important to treat myself regularly"*



**40%** (40%)

*"I use treats to cheer me up"*



**42%** (41%)

*"If I have an unhealthy treat, I make sure it's really worth it"*



**28%** (36%)

*"If I have an unhealthy treat, I compensate"*



# Top 5 most harmful products

1

Sugared beverages

2

Energy drinks

3

Processed foods

4

Artificial sweeteners / flavours

5

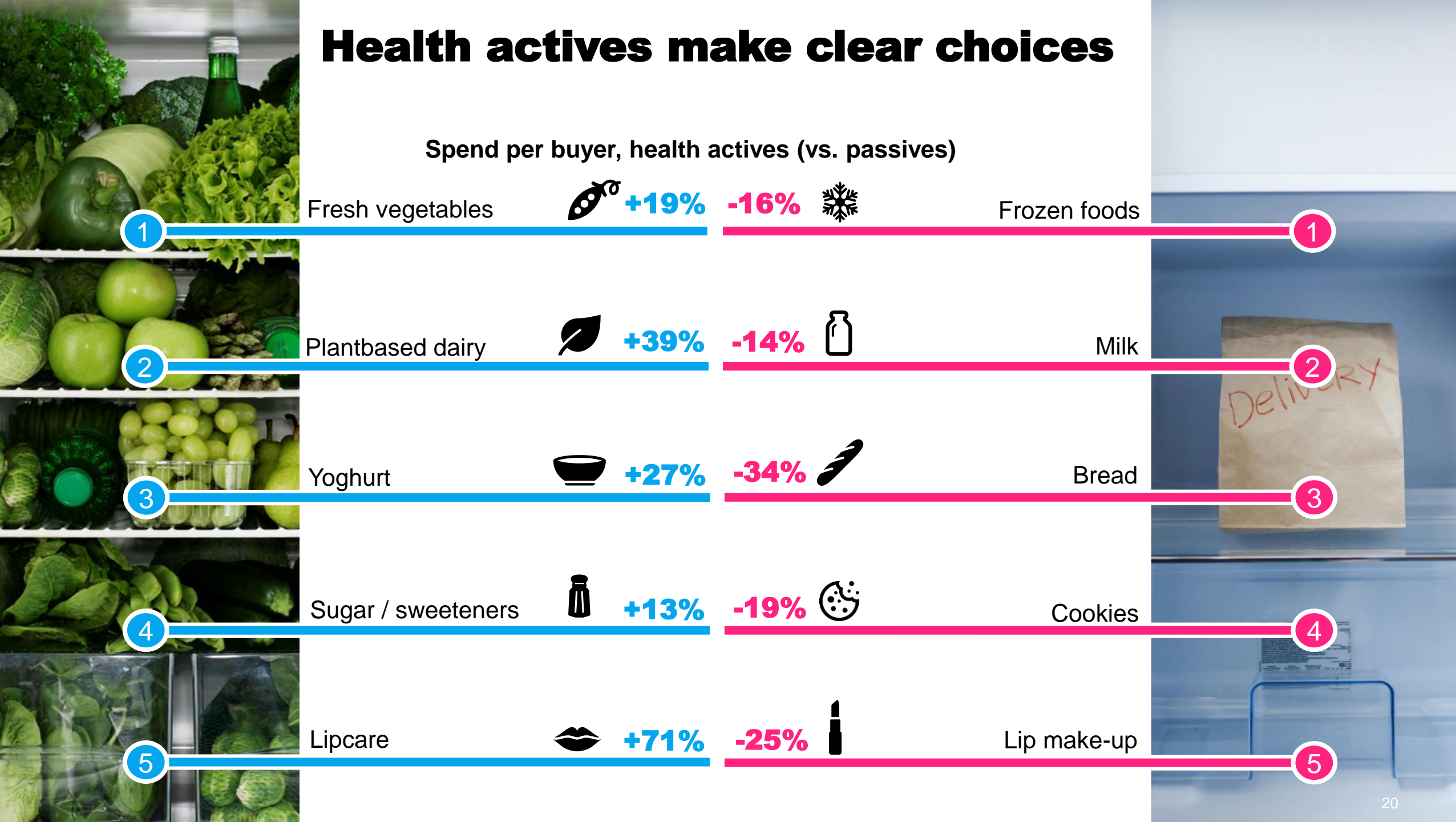
CBD oil / infusion





# Health actives make clear choices

Spend per buyer, health actives (vs. passives)



# With clear brand preferences

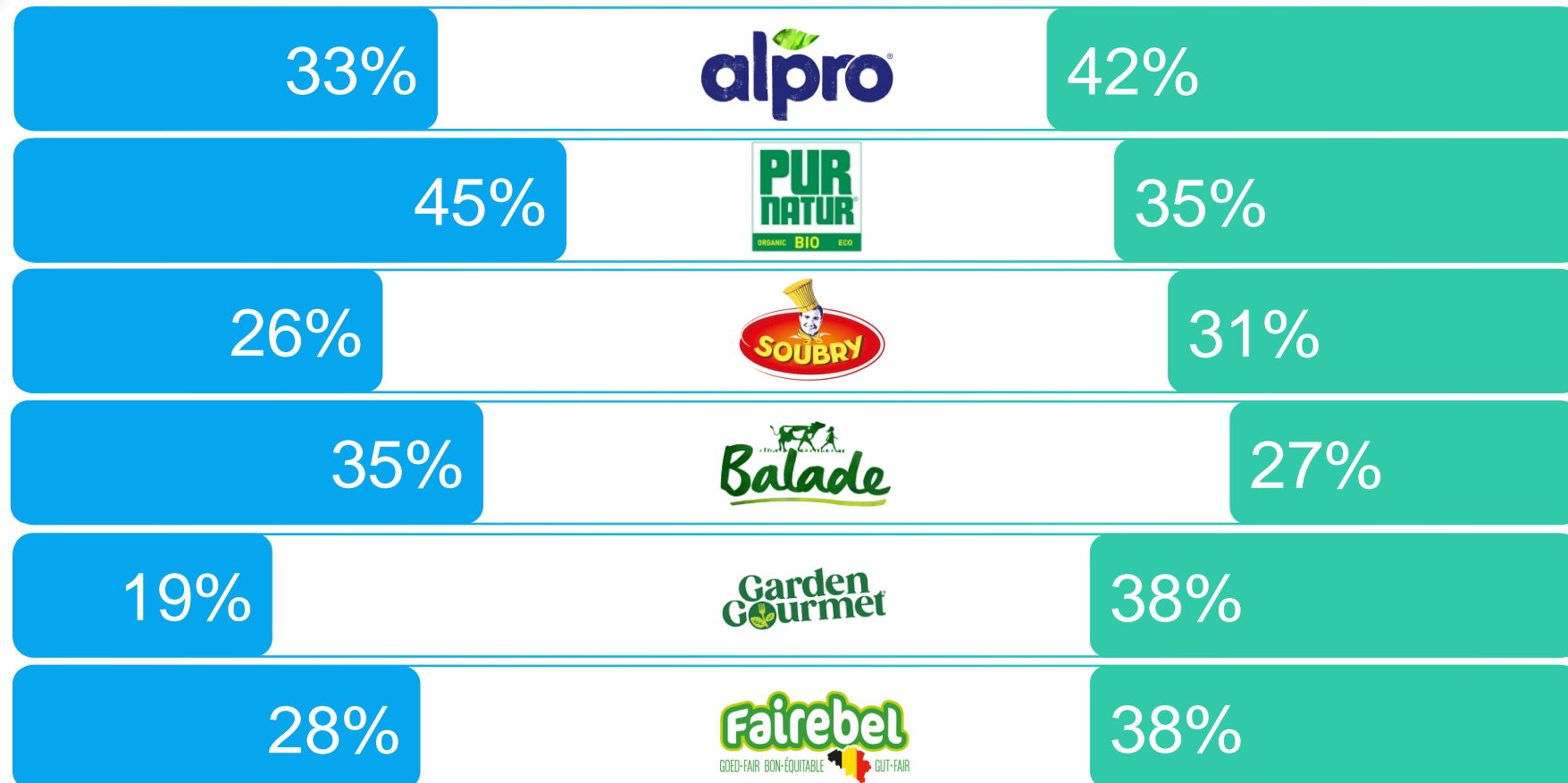


HEALTH ACTIVES

ECO ACTIVES



Brand value share % actives



# Value and confidence are key barriers

Product quality / functionality  
not (really) the issue



Too expensive



I'm confused



Don't trust



Not clearly labelled



High  
barrier  
to  
act



Too expensive



Not an expert



Hard to find



Less quality





## >> Shopping trolley nudge for greener purchases

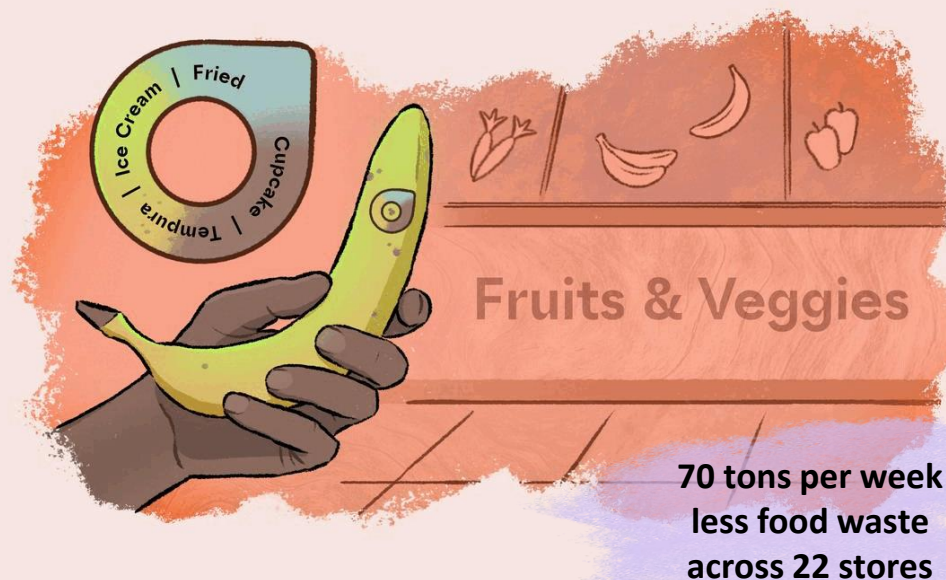
An experimental study in the Netherlands showed that social imitation inlays in shopping trolleys can promote vegetable purchases.



Green > Nudges

## >> The life extending fruit sticker that redefines freshness

Colombian changemakers predict a six-day extension in the shelf life of fruits and vegetables through the implementation of stickers with meal suggestions.



Green > Nudges



## Bridging the gap

**Sell the benefit, not the sacrifice**

*Good food, good mood*

**Break the habit, not the comfort**

*Effortless bonus*

**Transformational Trust**

*Just-as-well*

**Money well spent**

*Worth to me*



# Thank You

---

**Living Consumer Intelligence | [yougov.com/business](https://yougov.com/business)**

YouGov, 2024, all rights reserved. All materials contained herein are protected by copyright laws. Any storage, reproduction or distribution of such materials, in whole or in part, in any form without the prior written permission of YouGov is prohibited. This information (including any enclosures and attachments) is propriety and confidential and has been prepared for the exclusive use and benefit of the addressee(s) and solely for the purpose for which it is provided. We make no representations, warranties or guarantees, whether express or implied, that the information is accurate, complete or up to date. We exclude all implied conditions, warranties, representations or other terms that may apply and we will not be liable to you for any loss or damage, whether in contract, tort (including negligence), breach of statutory duty, or otherwise, even if foreseeable, arising under or in connection with use of or reliance on the information. We do not exclude or limit in any way our liability to you where it would be unlawful to do so.