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MAPPING THE
RICH WORLD OF
ALTERNATIVE
DIETS

Why what you gain
is far more than
you give up



A few years ago I gave up meat and ever since I've been on a Pescatarian and plant based diet with only a little fish and sea food. I would like to be able to say I made the change because of some strong held ethical belief or life changing event. But that's not true, the reason was far more trivial. In fact it was an accident.

My wife Lucie was doing dry January and I thought I should join in to show some moral support. However at the time I didn't fancy giving up drinking. Lucie had already been meat free for many years so I thought I would do that for a month, what's the worst that could happen? So I set aside the burgers, steaks and bacon for a few weeks to see what would happen.

For the first couple of weeks it was really tough, I can't lie. I think the low point was a 'work do' when everyone else was tucking into slices of rare beef while I was nursing a plate of vegetables. But then in the third week it got a little easier, I was enjoying all kinds of new foods, felt great and realised I wasn't pining for the meat based foods I'd given up anymore. By the end of the month I felt like I was in a groove. So I made myself a deal. Let's keep going with the meat free diet for a while, but as soon as I don't fancy it any more I'll start eating meat again. No Pressure. As it turns out it's a few years later and I'm still meat free.

What I've learnt from the whole experience is that people can change their diet for any number of reasons. Focussing on what you're giving up misses the point. What's been more important for me is how adopting an alternative diet has changed my life and experiences in a range of positive ways.

The small yet meaningful differences, add up to something that's really important to me. I feel happier about what I eat, why, how it influences my health and wellbeing and that perhaps it's a small but positive contribution to a more sustainable world. And importantly, I enjoy my food far more than I did before, even if there are some things I don't eat any more. The new discoveries definitely outweigh the old habits. Less truly can be more.

So when we started to think about running an insight project to explore the world of Alternative Diets I was keen to find out how my experiences might be reflected in the results. I was hoping the research would reflect the richness of my experiences and highlight opportunities to connect with people on the topic in a resonant and emotional way. As it turned out this, was exactly what we found, and I believe these results represent a great opportunity for brands and businesses to connect with people in this space on a very human level.



SO A BIT MORE ABOUT THE RESEARCH...

During the 1st lockdown last year we developed a new methodology we call NeedDriver Mapping, that identifies Need-based segments without the survey. For this project we analysed a sample of online conversations around alternative diets and clustered individual 'quotes' together based on the underlying drivers (not the topic of conversation). In this way we could identify the key needs shaping the choices people make about alternative diets and identify actionable needs based segments. We have now used this methodology many times over the past months for clients including Unilever, PepsiCo, Diageo, Colgate, Kraft Heinz, Phillips and more.

We chose a sample of online sources that give us stretch and inspiration across the alternative diet space – consumer, cultural expert and brand perspectives as well as a range of alternative diets including Vegan, Vegetarian, Raw, Keto, Natural, Clean, Plant and Weight loss.

The cluster analysis we run is based on Accelerate, our Machine Learning model of the Human Drivers of Opportunity. This 16 driver model has been built from the ground up based on the hundreds of qualitative deep dive projects we've run across a range of markets, brands, categories and thousands of Opportunity Springboards we've identified along the way.

The result was a 6 segment solution, with each segment describing the needs and motivations underlying the alternative diet space and the rich and diverse ways brands can connect in this space. Importantly these segments are as much about the emotional themes as they are the functional, and from that point of view represent a great opportunity. We have a lot more detail on them of course, but here's a quick introduction to these 6 segments, what they mean and why I think they're a great reflection of my own experiences on my own meat free journey.

Innovative experiences that bring people together

CREATIVITY, RELATIONSHIPS

... to create something new and original
... to have stronger connections with others

Unlocking intrinsic nutritional benefits

ENHANCEMENT

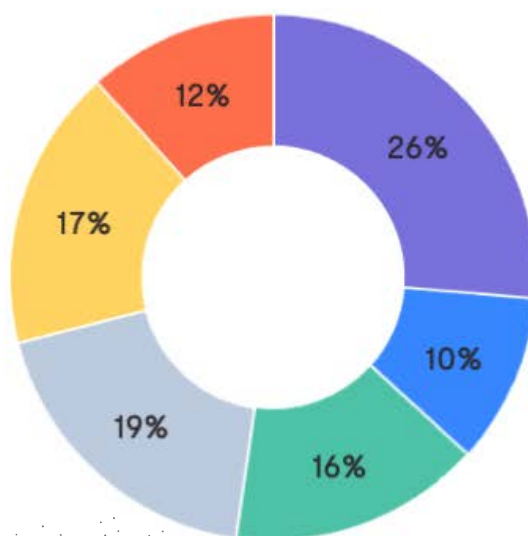
... to improve and perfect how our world works

Engaging with more natural lifestyles

ENGAGEMENT, EXPERIENCES

... to feel more connected to the world around us
... to live rich and meaningful lives

Size = % of content



Keeping your body (and mind) strong & healthy

POWER, CONTROL

... to be strong, energised and stimulated
... to navigate problems, uncertainty and change

Making tough dietary needs simple & enjoyable

SIMPLICITY

... to reduce life to the essence of what's important

Discovering & enjoying great food

EMOTION, EXPLORATION

... to deepen our emotional experiences
... to explore new worlds and broaden horizons

Alternative diets
can be about...

KEEPING YOUR BODY (AND MIND) STRONG & HEALTHY

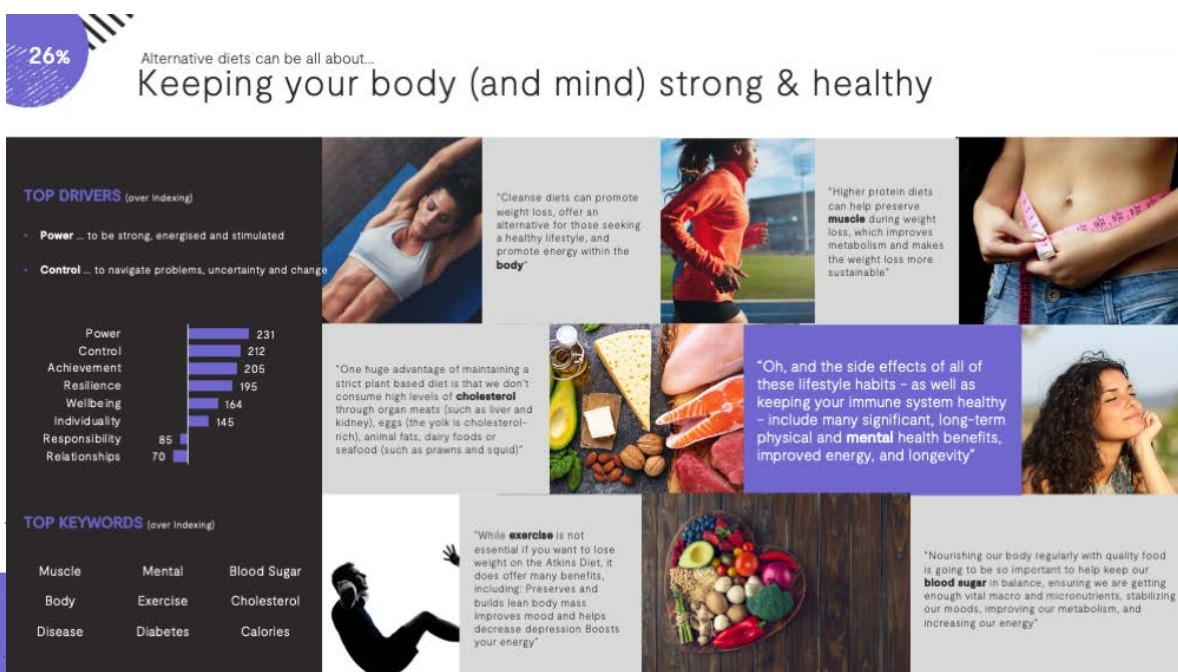
This is the largest of the segments being **26%** of the content in our sample, and combines the Drivers Power, Control, Achievement, Resilience, Wellbeing and Individuality.

In this segment adopting an alternative diet is all about getting back some control over your health and wellbeing, body and mind. In a world of uncertainty and change looking after your diet can help you keep body and mind strong, cope with health risks/problems and help you to get things done in your life.

Physically this can be about body strength, developing muscles, exercise, managing calories and blood sugar levels, looking after cholesterol and warding off the risks of disease. Emotionally it's about positivity, sustaining a healthy lifestyle with confidence and through that a sense of control -helping you to define yourself and who you are through the choices you make in life.

“ For me this was perhaps one of the most important aspects of my meat free journey, certainly in terms of sticking to it at the start. On a personal level I'm sure I feel a whole lot better eating this way and I believe it contributes significantly to everything that I try and do to boost my wellbeing. If you want to watch a film that discusses this topic then try Gamechangers on Netflix. Hard to know the full truth, but it makes a compelling case for plant based being a more natural way of eating.”

For brands, I think tapping into this space means going beyond the functional health and wellbeing benefits to engage consumers with that sense of confidence, control and self-realisation that comes from taking a positive step to look after your health.



Alternative diets
can be about...

MAKING TOUGH DIETARY NEEDS SIMPLE & ENJOYABLE

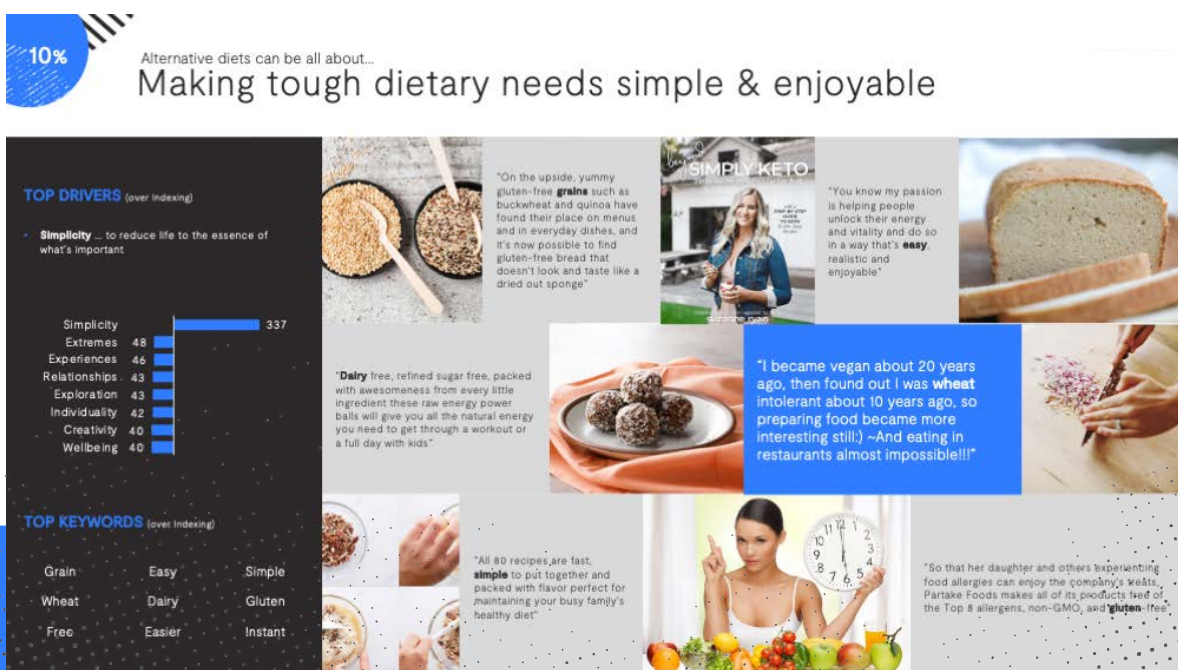
This is the smallest of the segments being
10% of the content in our sample and is
focussed on the key driver of Simplicity.

In this segment adopting an alternative diet is all about embracing a simpler and pure way of life, while at the same time overcoming the complexity that the requirements of a specific diet can bring in day to day life. This is an interesting duality, where your diet bring simplicity in terms of decisions and guiding your life, but complexity in managing the implications day to day.

Physically this can be about ease and simplicity whilst focussing on the challenges of specific dietary requirements around wheat and grains, gluten and dairy throughout the day and across the family. Emotionally it's about embracing a simpler and more vital way of life without being tripped up by these day to day logistical challenges.

“ I've been lucky that my wife is a great and enthusiastic cook and has been eating meat free for years, so at home it's been relatively easy for me to stick to my diet and experience a range of new foods in the process. The greater challenges come when we are eating away from home. Plus the greater difficulties of when you start to throw more dietary limitations into the mix that we've been exploring recently - being lactose intolerance, avoiding processed foods, cutting down on gluten, periods of going plant only or fully vegan. All adding greater complexity to life. Some of the food alternatives that have come into the mainstream market have worked really well for us.”

For brands the opportunity is about making people's chosen dietary approach simple to embrace. It's the instant solutions that answer their challenges throughout their day and communicating the idea of their diet being a move to a simpler, purer way of life in emotional terms.



Alternative diets
can be about...

DISCOVERING & ENJOYING GREAT FOOD

At **16%** this is one of the mid-sized segments. It combines the Emotions, Extremes and Exploration drivers.

In this segment adopting an alternative diet is all about getting a richer, deeper emotional enjoyment of your food: the choices you are making are leading you to try new and exciting flavours that you wouldn't have otherwise considered. It's breaking you out of your dietary rut and forcing you to make exciting new discoveries.

Physically this can be about taste, textures, flavours and the enjoyment of delicious food. Emotionally it's about love, laughter, happiness, discovery and creating amazing experiences that give you a happier life.

“ *This is the area that's been the biggest eye-opener for me...and perhaps the most positive part of my meat free journey. When we stick to the same old favourites in our diet we miss out on a wide range of new foods, flavours and textures out there. Going without meat sounds boring. But that's not been my experience at all. I've been lucky enough to enjoy all kinds of amazing plant based foods. I would definitely recommend trying some of the plant based recipes in books like Dirty Vegan and Bosch.* **”**

For brands, this opportunity is about changing the narrative from alternative diets being about restrictions and what you can't have, to opening up an exciting new world of taste experiences that will enrich your life and boost your mood.



Alternative diets
can be about...

ENGAGING WITH MORE NATURAL LIFESTYLES

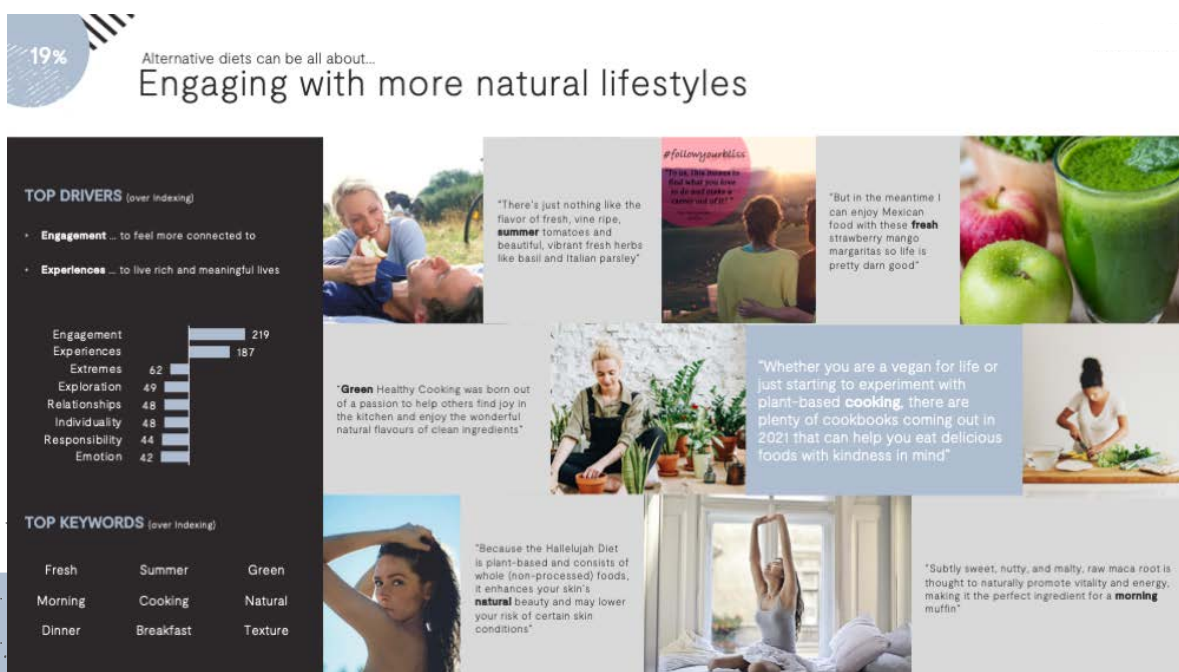
This is the second largest segment at
19% and combines the Engagement and Experiences Drivers.

In this segment, adopting an alternative diet is all about making a connection with the natural world around you and immersing yourself in a more natural lifestyle. This is about the meaning and wellbeing from connecting to nature.

Physically this can be about freshness, natural ingredients, greenery, the outdoors and is rooted in the moments of connection in terms of cooking and throughout the day. Emotionally it's about how natural living feels... beautiful, vibrant, fresh, passionate, joy and intense sensory experiences.

“ *This one really resonates with me too. I exercise outdoors, running, hiking and skiing. Mountains are my favourite place to be and it's amazing how some time in nature can clear your head and leave you feeling great. Maybe I hadn't connected it so clearly in my own mind before, but the link between a natural outdoor lifestyle and a fresh plant based food diet really makes sense. The naturalness and freshness, as well as the healthy feeling that both can give you, creating a feeling of not just being full but also satisfied.”*

For brands, the opportunity here is in going beyond the natural qualities of the foods and products themselves to engaging the emotive experiences: a more natural and sensorially rich lifestyle and the intrinsic link between the two.



Alternative diets
can be about...

UNLOCKING INTRINSIC NUTRITIONAL BENEFITS

This is one of the mid-sized segments at

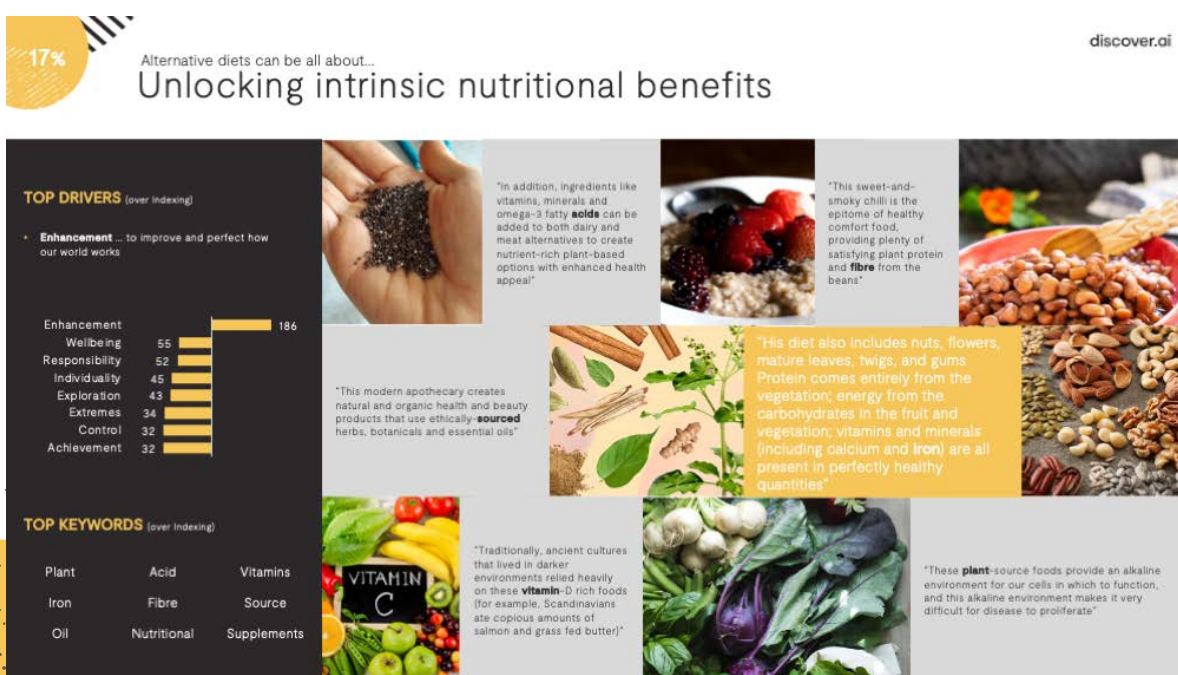
17% and is based on the
Enhancement Driver.

In this segment, adopting an alternative diet is all about seeking out the enhanced intrinsic value of the ingredients within the food you eat and the benefits they bring in terms of both taste and health.

Physically this can be about the intrinsic value of natural foods and particularly plant based ingredients, with a focus on their specific composition such as the vitamins, minerals, fibre and the nutritional benefits they bring. Emotionally it's about how satisfying these nutritionally rich ingredients can be, and the positive feeling of healthiness that they leave you with.

In this space brands need to make the ingredients the heroes of the story, focussing on their intrinsic nutritional benefits, but also guiding people to the shortcuts and cues that will get them a nutritionally balanced diet without having to try too hard.

“What I struggle with on nutrition is that I am not really aware of the intrinsic value of the foods I eat. I don't know how to balance them for maximum effect, and to be honest I'm not that interested in learning about it. For me, the structure that alternative diets give me is a kind of short cut to finding a nutritionally rich diet without having to do the hard work. Simply by eating plant based foods and a high proportion of unprocessed foods I'm getting that nutritional balance regardless. Much has been made about the issues of going meat free and the nutritional imbalances this might create, but there is another school of thought that suggests our bodies are optimised for processing plant only diets. All I can say is that my experience of a mostly plant based diet has been that my nutrition hasn't suffered.”



Alternative diets
can be about...

INNOVATIVE EXPERIENCES THAT BRING PEOPLE TOGETHER

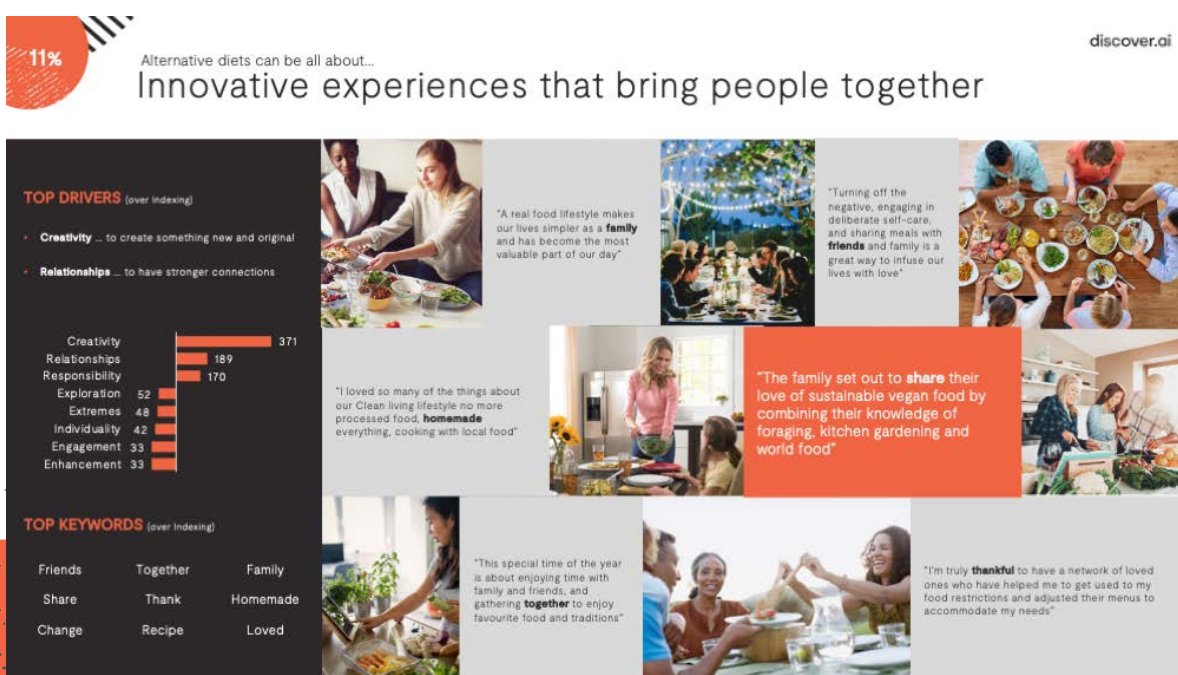
This is one of the smallest of the segments
11% and combines the Drivers Creativity,
Relationships and Responsibility.

In this segment adopting an alternative diet is all about creating exciting new food experiences that bring people together, both in terms of family and friends but also respecting the people and communities that produce the food and make these moments possible. It's about placing a greater importance on the human story of our food.

Physically this can be about the times together sharing with family and friends. Emotionally it's about placing value in the principles of care, love, appreciation, the effort of home-made food and celebrating the recipes that are the stories of our lives and the traditions they represent.

For brands this means looking beyond the dietary choices of the individual and tapping into the human connections behind how our food is created, shared and the sense of community that it can represent, at both a local and global level.

“One of the first things Lucie asked me when I said I was going to give up meat was if I was going to become a ‘vegetarian bore’. In the early passions of your new alternative diet it’s all too easy to share your beliefs with the zeal of the newly converted. The truth is though, most people aren’t that interested in hearing what you eat and why. And no one really likes to be told what to eat by someone else. But this aside I do think there is something about adopting alternative diets that has the potential to draw people together in new and different ways. At a local level food acts as a social glue and the traditions of breaking bread together run across cultures. Alternative diets represent an opportunity to do this in a different way. And more broadly alternative diets have the potential transform how we relate to each other at a global level with the sustainability benefits of the world shifting to less meat and more plant based consumption being well documented.”



Across these 6 segments hopefully you've seen how we've captured the key drivers behind alternative diets, which together provide a systematic framework for planning how best to connect with existing and future potential consumers in this space, both functionally and emotionally. Importantly we were able to do this by exploring consumer, cultural expert and brand online sources that explore the space more broadly than traditional research, and at a fraction of the time and cost. And hopefully like me you can see how the themes contained within this research echo our own experiences of embracing alternative diets in our lives, even in just a small way, and hold the clues to how brands and businesses can engage in this space at a human and emotional level.



If you'd like to know more about our Alternative Diets project, Accelerate, NeedDriver Mapping or Discover.ai generally then please do **get in touch**.

And whatever diet you choose to follow, enjoy it!

discover.ai