

EAT THEM TO DEFEAT THEM

How have three years of
Eat Them to Defeat Them
affected shopping behaviour?



VEGPOWER

itv

HOW HAVE THREE YEARS OF EAT THEM TO DEFEAT THEM AFFECTED SHOPPING BEHAVIOUR?

Written by

Sara Jones at Pearl Metrics



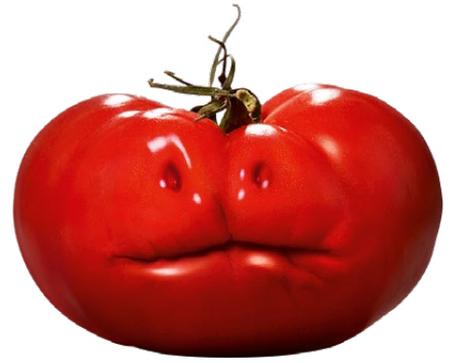
**EAT THEM
TO DEFEAT THEM**

In 2019 ITV, Veg Power and
adam&eveDDB developed the
EAT THEM TO DEFEAT THEM
advertising campaign

VEGPOWER

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EAT THEM TO DEFEAT THEM 2019



Eat Them To Defeat Them has now run for three successful years; its chief aim has been to get children eating more healthily and that message is delivered through mainstream media channels, the majority of which have been donated free of charge¹, and through a dedicated schools' programme.

The advert used for the first two years of the campaign showed evil vegetables taking over the world and called on the kids to eat more veg and save the world.

Additional creative executions were developed in 2020 and 2021, but the theme held true: kids were needed to help save the world from the evil veg.

The inaugural campaign, in 2019, ran from January to March and delivered approximately £4.0m worth of media value². The message was delivered through TV spots on ITV, a large amount of outdoor poster space, some Press/Cinema and 300k school packs.



38.2
MILLION
PEOPLE SAW
THE TV AD



¹ As much of the media is donated, where we discuss the "value" of the campaigns, this refers to the cost had it been paid for.

² This excludes Editorial air time in ITV shows. If we include this the value is estimated to be £5.5m

EAT THEM TO DEFEAT THEM 2020



For Year Two, the TV ads premiered on the 15th February 2020 (just before the first lockdown) and the campaign ran until the end of March). In total, Eat Them To Defeat Them 2020 delivered an estimated £3.1m worth of media. There was less outdoor media than had originally been planned, due to the Covid lockdown, but there was £664k more TV (than 2019) with expanded coverage from foundation supporter ITV, and from new partners Channel 4 and Sky. By

the end of March 2020, 86% of all children 4-9 years old would have seen the ad, on average, 12 times³ and 425k school packs had been given out.

³ BARB

EAT THEM TO DEFEAT THEM 2021



Covid restrictions delayed the launch of Year Three of Eat Them To Defeat Them to May 2021, and the campaign ran until July, with a small follow up burst in September '21. The lion's share of the media was placed on TV and we saw the channel (& programme) mix diversify even further from previous years due to the additional partners offering air time on their channels. In total, the value of the media delivered in 2021 was £3.3m and the number of school packs increased again to 468k.

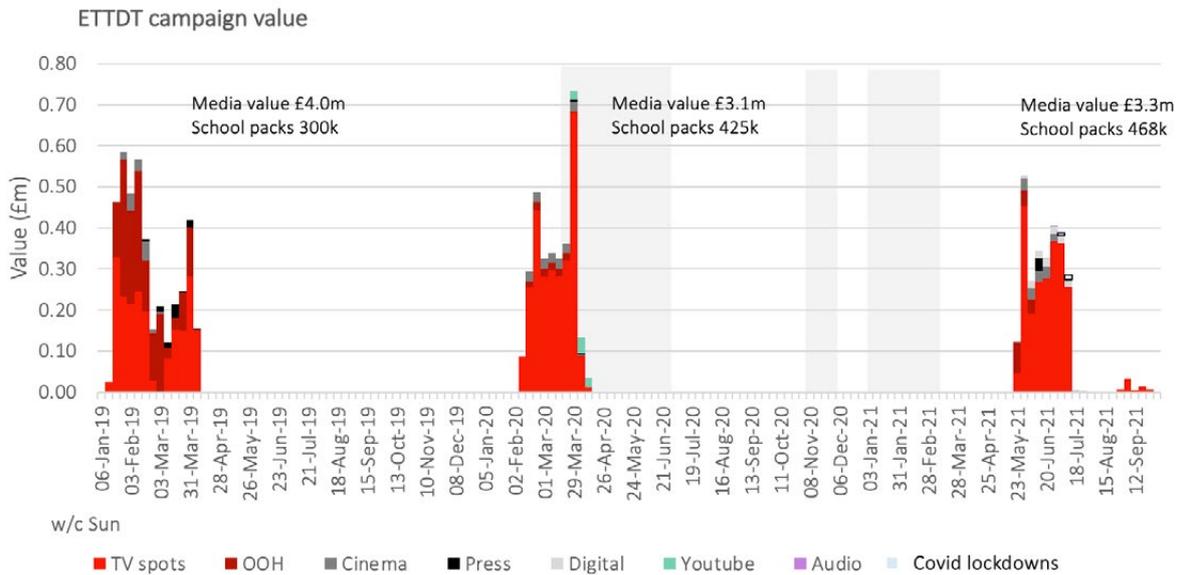
	Media	School Packs
2019	4.0m	300k
2020	3.1m	425k
2021	3.3m	468k



43
MILLION
SAW OUR TV
ADVERTS⁴

⁴ BARB

Eat Them To Defeat Them campaign media value



SOURCE: Nielsen Media Research, GoodStuff, Essence, ITV & Veg Power

Following all three bursts of the campaign we commissioned consumer research to find out what our target audience thought about **EAT THEM TO DEFEAT THEM.**

CAMPAIGN BURSTS

32%
of kids were aware
of the campaign
in 2019...

48%
were aware
of the campaign
in Year Two



DOWNLOAD CAMPAIGN REPORTS:

📄 2019 📄 2020 📄 2021

After the 2019 activity, an incredible 32% of kids were aware of the campaign and in Year Two this rose to 48%. The study also shows that not only did *Eat Them To Defeat Them* make eating vegetables seem fun to children, but parents were claiming to be buying more veg and more importantly, kids were eating more too.

Claimed behaviour is all well and good but we needed to know if this was actually translating into a change in shopping behaviour and consumption. Back in 2019 we set ourselves the task of evaluating the true impact that *Eat Them To Defeat Them* had on purchases of vegetables in the UK, and we have now completed the third wave of this evaluation.

OUR APPROACH TO EVALUATION

EVERYONE HAS HEARD THE PHRASE,
"HALF THE MONEY I SPEND ON ADVERTISING IS WASTED; THE TROUBLE IS I DON'T KNOW WHICH HALF"
BUT THAT'S NO LONGER TRUE

This phrase was said approximately 100 years ago⁴, and thanks to advances in data collection and computer power, it is no longer true. With the UK investing c. £25,400 million in advertising each year⁵ it is incumbent on marketers to use mathematical evaluation to guide decision making and ensure they can justify their investment choices to their

board members and shareholders. There are many approaches used but the most common and well respected is Econometrics. Used across all sectors by brands such as Kraft Foods, VW, Argos and Tesco, Econometrics helps marketers to understand the contribution that marketing makes to their sales and ultimately their bottom line.

So what is Econometrics? If you were to study Economics at university you would have at least one module of Econometrics in your course⁶. It uses mathematical regression analysis (similar to the type studied in GCSE Maths) to build an equation that explains what causes movement in an important variable over time. Econometrics is used in many wide ranging aspects of society such as working out what causes fluctuations in GDP (ONS), understanding the key triggers

of war (Foreign Office) and setting insurance premiums (insurance companies). In the case of marketing, the variable of interest is most typically sales and our "model" or equation might look something like the below⁷. It's looking at how sales are affected by different variables which for this product are Christmas, weather, TV advertising, promotions, price and competitor activity.

Our **dependent variable**, is the metric we are interested in understanding in week t



$$\text{Sales}_t = \alpha_t + \beta_1 \text{Christmas}_t + \beta_2 \text{Rain}_t + \beta_3 \text{TV}_t + \beta_4 \text{Promotions}_t - \beta_5 \text{Price}_t - \beta_6 \text{Competitors}_t + \epsilon_t$$

α is our **constant term**: it's the sales we expect when nothing else varies

The β s are our **coefficients**. They can be +ve or -ve. Our modelling software estimates the value of each coefficient, using Econometrics. The value tells us how many sales we get for a 1 unit increase in that variable. E.g. 10 x TV means we make £10 for every £1 of TV we buy

ϵ is our **error term**: this represents the sales that we can't explain with the other factors in our model. It is vital that these are random and display other key statistical properties

⁴ The originator is uncertain but it is often attributed to John Wanamaker (1838-1922) and Lord Leverhulme (1851-1925)

⁵ 2019 Adspend AA/WARC Expenditure report Apr 2020

⁶ The LSE mandates Econometrics until the end of year 2. <https://www.lse.ac.uk/study-at-lse/Undergraduate/Degree-programmes-2021/BSc-Economics>

⁷ This is purely an illustrative model and is not representative of the model used to evaluate Eat Them To Defeat Them

OUR INPUTS



As you can see, an Econometric model doesn't just include data on advertising; in order to accurately understand consumers' response to *Eat Them To Defeat Them*, we had to measure ALL factors that caused people to buy vegetables. In order to build such a model, we collected an exhaustive set of data on all the key attributes we needed:

<p><i>Eat Them To Defeat Them</i> media data was provided by ITV, GoodStuff, Essence and Nielsen Media Research</p>	<p>Sales data was provided by IRI</p>
<p>Price & promotions data was provided by IRI Worldwide</p>	<p>Seasonality and weather data was provided by Pearl Metrics and Met Office</p>
<p>Key events data was provided by Pearl Metrics and Google</p>	<p>Supply issues were provided by Veg Power and Google</p>
<p>Economic conditions data was provided by ONS, GFK, Bank of England and HM Treasury</p>	<p>Covid & other trend⁸ data was provided by ONS, GFK, Google & instituteforgovernment.org.uk</p>
<p>Competitor category media e.g. fruit was provided by Nielsen Media Research</p>	<p>Vegetable category media was provided by Nielsen Media Research</p>

We obtained c. 5 years of detailed weekly data on all these areas; this gave us 245 data points which were crucial to help us understand long term trends and patterns.

It is worth noting that the sales data, very kindly provided by IRI, pertains to grocery multiples (i.e. Tesco, Sainsburys etc) and does not include

discounters (Lidl & Aldi), other channels such as independent retailers and box schemes – which means the reported sales increase in this report will be lower by the market share of the discounters and independents possibly more so given that the survey data shows that the campaign performs more strongly with lower income families.

⁸ E.g. Veganism, veg box delivery etc

OUR SCOPE

Obviously the UK vegetable market contains hugely varied products, so the next challenge was to work out how we could model a whole category robustly. As the key drivers of vegetable

sales are largely external factors such as availability, weather and events such as Christmas/Easter, we separated all vegetables into 11 groups, each of which had similar purchase patterns⁹. The

next most fundamental driver in this category is price so we ensured that the price points and trends were similar in each of our 11 groups¹⁰. The groups we modelled were:



**Fresh
Corn**



**Fresh
Broccoli**



**Fresh
Carrot**



**Fresh
Pepper**



**Fresh
Tomato**



**Salad
Veg***



**Winter
Fresh Veg****



**Other
Fresh Veg*****



**Frozen
Pea**



**Other
Frozen Veg**



**Canned
Corn**

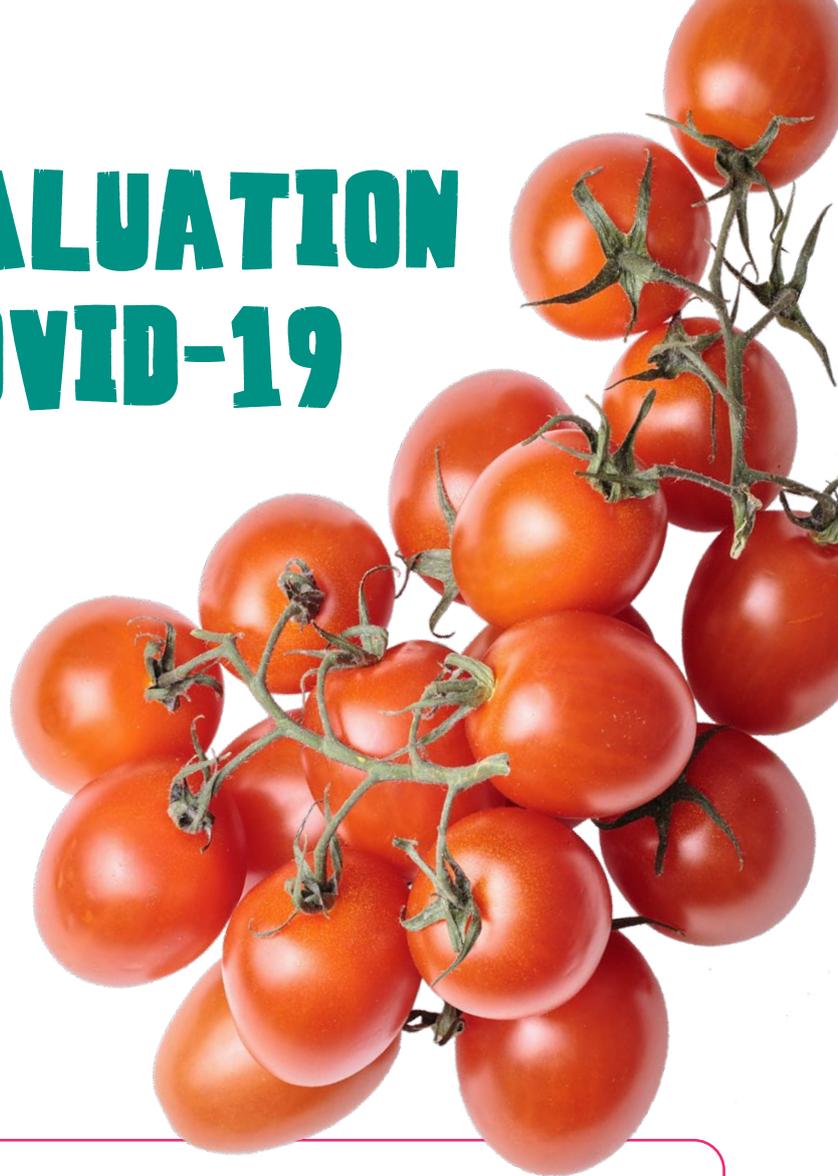
* Avocado, celery, lettuce, radish, asparagus, cucumber. ** Cauliflower cabbage, parsnip, brussels sprouts, other root veg. *** Courgette, mushroom, stir fry, mixed prepared, other fresh

⁹ Please note that the data cuts available to us were limited by the pre-defined structure of the IRI data

¹⁰ The campaign was not aiming to directly drive sales of staples such as potato, onion or garlic, so sales of these products were not modelled explicitly



OUR EVALUATION OF COVID-19

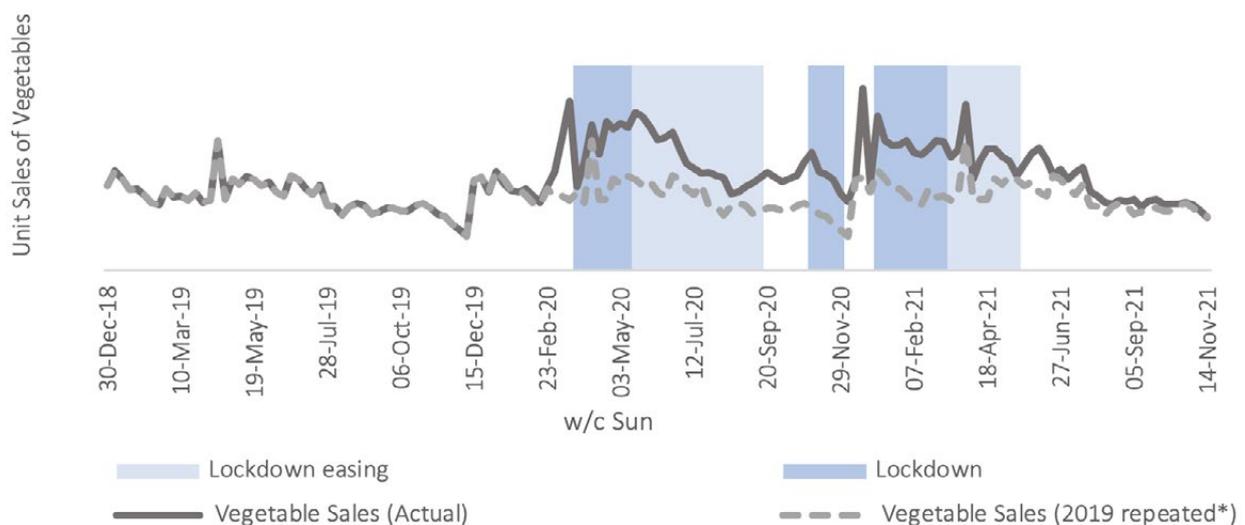


When the 2020 campaign was being planned, no one could have guessed what would happen in March 2020 – the UK went into lockdown on 23rd March and even in the weeks preceding this date, demand for supermarket bought food (including vegetables) increased considerably.

The fortuitous upside of our modelling approach is that Econometrics is perfectly suited to separating *Eat Them To Defeat Them* from Covid¹¹ and so we can now report on the impact that lockdown had on sales.

We could see from basic sales analysis that demand for UK vegetables corresponded to the times of the national lockdowns.

Effect of lockdowns on veg sales: sales shot up in the weeks preceding lockdown and stayed elevated, throughout the respective lockdowns, until May 2021



SOURCE: IRI and <https://www.instituteforgovernment.org.uk/sites/default/files/timeline-lockdown-web.pdf>. * We have corrected for the week of Easter which moves

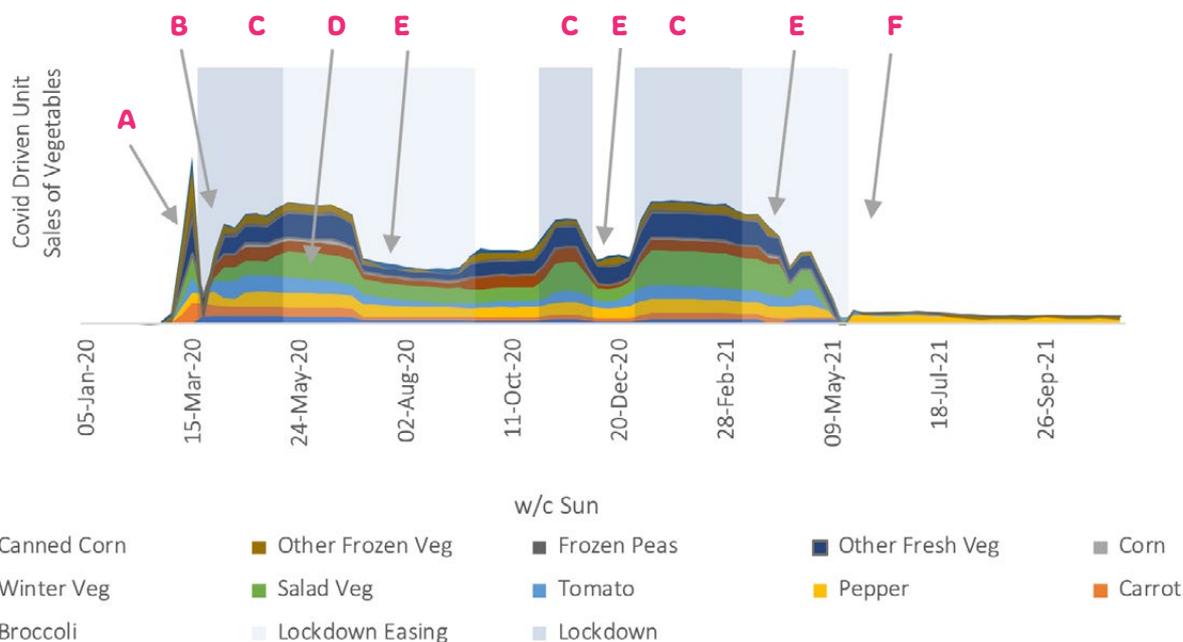
¹¹ *Eat Them To Defeat Them* ran in 2019, pre Covid, and the 2020 campaign kicked off several weeks before Covid's impacts were felt. 2021 was run post Covid lockdowns, as the grocery sector was returning to pre Covid levels

We used a weighted lockdown variable in our models to help us separate the incremental sales caused by the increased meal occasions at home over the Covid period, from other factors that also changed in this period such as weather, prices, category media and of course *Eat Them To Defeat Them*. Each model had its own Covid variable, as demand for each type of vegetable varied; for example people stocked up

on tins and frozen pre lockdowns but sales eased off more quickly than fresh vegetables which were elevated throughout.

Our modelling shows that the sales response to Covid can be grouped into six distinct phases, from pre-lockdown stockpiling to the resumption to pre-Covid levels:-

Our models show there were six phases to the incremental sales attributable to Covid



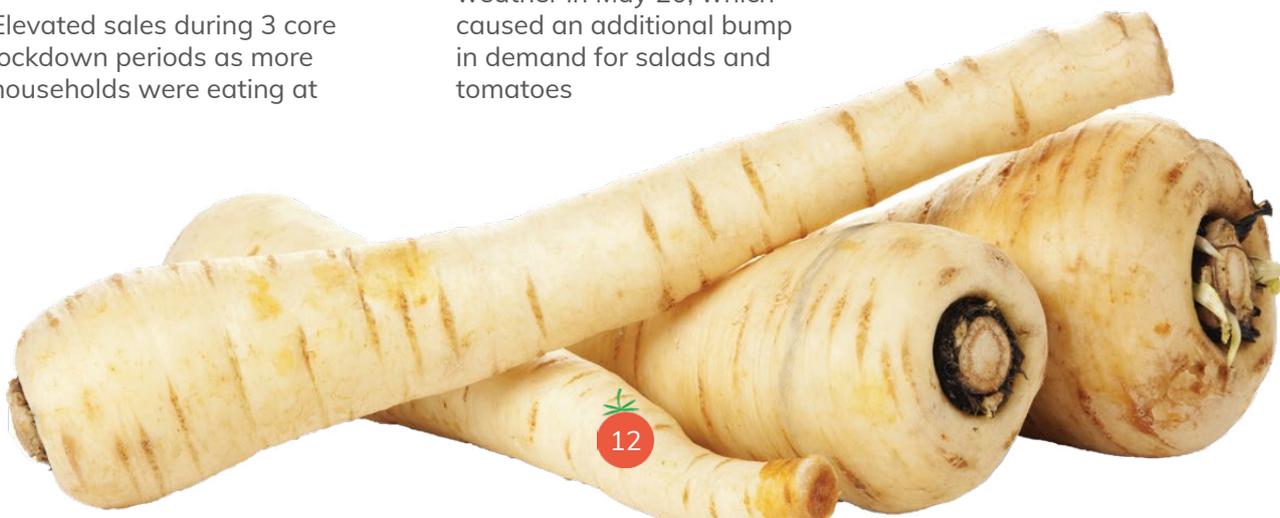
SOURCE: Pearl Metrics modelling based on IRI sales data of Groc Multis

- A** Early stockpiling pre lockdown
- B** Dips when lockdown first commenced and households couldn't shop/there were out of stocks
- C** Elevated sales during 3 core lockdown periods as more households were eating at

home (no school meals, no office lunches and restaurants shut) and hence shopping from the supermarkets

- D** There was exceptionally hot weather in May 20, which caused an additional bump in demand for salads and tomatoes

- E** Sales start to return to normal levels as each of the 3 lockdowns eased
- F** Sales are largely back to pre-Covid levels



OUR EVALUATION OF EAT THEM TO DEFEAT THEM

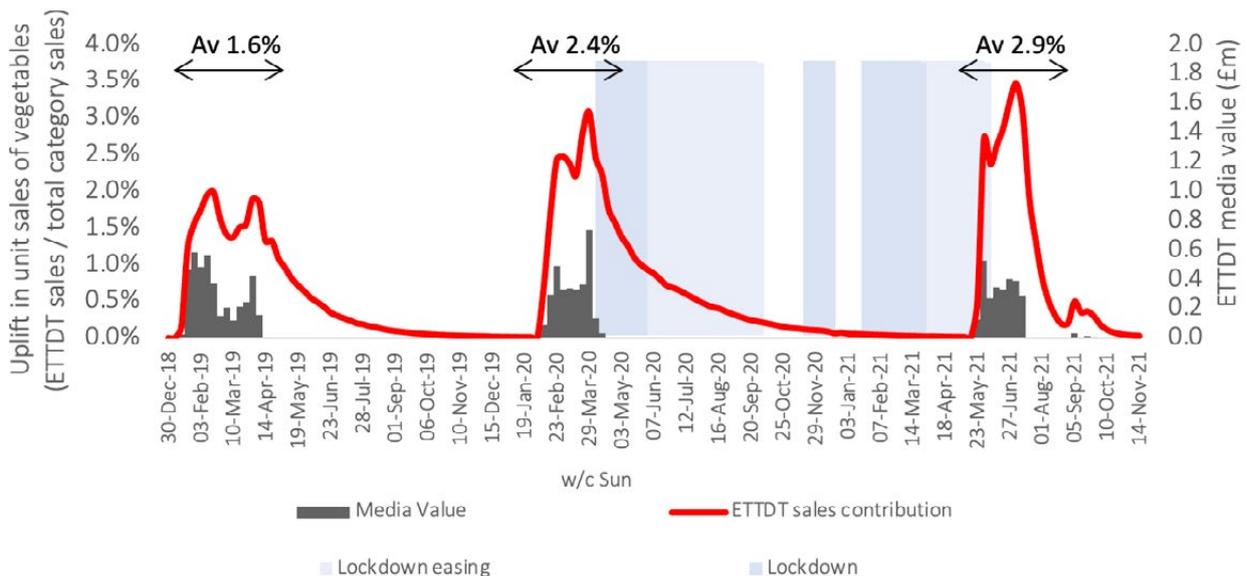
Our suite of Econometric models provided a breakdown of the factors that drove weekly sales of vegetables over the last 5 years; the weekly sales attributable to price, promotions, weather, Christmas, Vegetarianism/ Veganism, Covid etc. By doing this we could accurately isolate the pure impact of Eat Them To Defeat Them on vegetable sales, **over and above** the other sales drivers.

When we evaluated Eat Them To Defeat Them back in 2019 we could clearly see that when the campaign was live, category sales increased by c.2%. What we've been able to see with more data is that consumers didn't simply return to their normal shopping behaviour afterwards. Instead, sales were elevated for many months afterwards. We achieved something that many marketers dream of; we changed long term shopping behaviour. We saw a very similar pattern in 2020, with sales elevated for c. 6 months.

In 2021 we saw the period for sales change and additional incremental sales fall more quickly post-campaign. The enforced change in the campaign timings (from Feb-Mar in 2019 & 2020 to May-Jul in 2021 due to ongoing Covid lockdowns) meant that families went on holiday soon after seeing the ad, causing behaviour to revert more quickly. This demonstrates the importance of hitting Q1 for future bursts of Eat Them To Defeat Them.



The Eat Them To Defeat Them Campaign caused sales to increase when the CAMPAIGN was on air, and sales were still elevated for many months afterwards too



SOURCE: Pearl Metrics modelling based on IRI sales data of Groc Multis

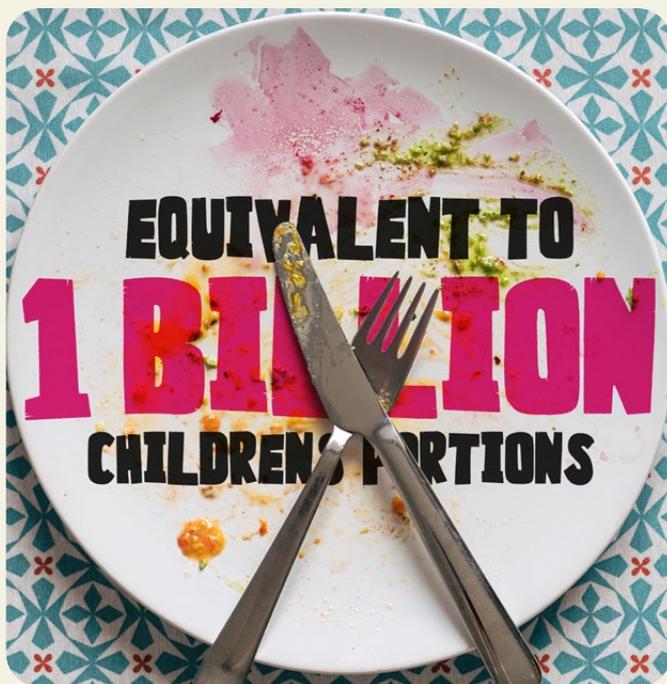
The chart on the previous page shows us that in Year One of *Eat Them To Defeat Them* sales attributable to the campaign made up 1.6% of the vegetable category. Another way of thinking of this is that *Eat Them To Defeat Them* caused a 1.6% boost to the vegetable category. However, the chart goes on to show that the campaign has grown in strength from year to year. In Year Two the uplift from *Eat Them To Defeat Them* rose to 2.4% and in Year Three *Eat Them To Defeat Them* contributed a 2.9% uplift whilst the campaign was live. This is an incredible result, when you consider the size of the vegetable category¹².

Between February '19 to November '21 *Eat Them To Defeat Them* has encouraged the sales of an additional 39,242million gm of vegetables^{13,14}. The equivalent of 981million child sized portions¹⁵. In revenue terms, this amounts to £92m of extra vegetable sales in Grocery Multiples. These are incremental sales over and above the additional sales generated by factors such as Covid, price change and promotions.

Whichever way we look at *Eat Them To Defeat Them*, the financial return has been exceptionally high. If the three year campaign had been bought on a commercial basis the media alone would have cost £10.6m, and we would be reporting a ROMI¹⁶ of £7.63 net revenue generated for every £1 of media. To put this in context, even the most effective FMCG brands only see revenue ROMIs of £3-5.

However, this wasn't a commercial campaign and the media on the whole was donated free of charge. The actual production investment cost across the three years was £1.5m, meaning the true ROMI was a staggering £60 of net revenue for every £1 of spend.

Furthermore, these payback figures don't even attempt to take into account the very purpose of the campaign; the impact on health and society of getting children to eat more healthily. The true ROMI is considerably more impressive.



¹² 3 ways we can be sure of these results: (a) We built 11 models and had one variable for each of the 3 *Eat Them To Defeat Them* bursts in each, giving us 33 *Eat Them To Defeat Them* variables/contributions. Each one provides a similar % uplift, strongly suggesting we are not picking up a spurious result. (b) We aren't picking up underlying seasonality, as we have 2 years of data pre *Eat Them To Defeat Them* to gauge the market seasonality and the campaign was not run at the same time each year (c) We quantify the contribution from category media and the ROI is sufficiently in line with *Eat Them To Defeat Them* (£ for £).

¹³ We assume 1 IRI unit = 400g

¹⁴ Recall that the sales data, very kindly provided by IRI, pertains to Groc Mults and does not include other channels such as independent retailers and box schemes, which are therefore not included in our analysis

¹⁵ We assume 1 child portion = 40g

¹⁶ Return on Marketing Investment = (Incremental revenue - media value) / media value

EAT THEM TO DEFEAT THEM
IS ONLY MADE POSSIBLE BY THE
GENEROUS MAIN SPONSORS WHO HAVE
SUPPORTED US DURING ONE OR MORE
OF OUR FOUR CAMPAIGNS SINCE IT
LAUNCHED IN 2019.



Public Health
England



Llywodraeth Cymru
Welsh Government

Veg Power and ITV would like to thank everyone who has made Eat Them to Defeat Them such as success over the first three years. Channel 4, Sky Media, adam&eveDDB, Essence Global, Good Stuff, iFour, KPM Group, Yada Yada, The Smaller Boat, IRI Worldwide, Nielsen, Pearl Metrics. Thanks to our generous media partners 8 Outdoor Media, Acast, Ad Media, Beano, Blow Up Media , Boomerang, Clear Channel, Daily Mail, DCM, Executive Channel Network, First News, Global, Google, The Guardian, JC Deceaux LadBible, Maxx Media, Metro, News UK, Mumsnet, Ocean Outdoor, Open Media, Outdoor Plus, Pearl & Dean, PopJam, Primesight, Spotify, Super Awesome, The Telegraph, Twitter, and Verizon and to the thousands of schools, teachers, caterers, public health professionals, chefs, campaigners and veg lovers who support us on social media and in schools and communities and to the millions of parents and kids tucking in to all those lovely veg.

PEARL METRICS

This article was written by Sara Jones, founder of Pearl Metrics, an independent analytics consultancy.

Pearl Metrics uses data to measure, report and evaluate customer behaviour; past, present and future. We allow organisations to link their investment decisions to business outcomes, removing the need for gut instinct, enabling insight driven decision making.

We have been working with the team behind *Eat Them To Defeat Them* since 2019 and we look forward to helping them shape the future campaigns to maximise the impact of this incredibly important work.

pearlmetrics.com

ITV SOCIAL PURPOSE

ITV's Social Purpose is about using the power of ITV to shape culture for good, through using creativity and scale to inspire positive change in the world, and to nurture a responsible and inclusive working environment. ITV's social purpose encompasses the following four priorities - better health, diversity and inclusion, environment and giving back, all with their own measurable goals. In 2019 ITV, Channel 4 and Sky launched a £10m, three-year commitment to support healthy eating and an active lifestyle for the UK's kids.

itvplc.com/socialpurpose/overview

VEG POWER

Veg Power, a not-for-profit alliance, was founded by the Food Foundation, Hugh-Fearnley-Whittingstall, Sir John Hegarty and Baroness Boycott to turn around vegetable consumption in the UK. It uses advertising and communications to inspire kids to eat vegetables and create life-long good food habits that they will, in turn, share with their children.

vegpower.org.uk



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