

WorldpanelUsage

Food & Drinks

The Recessions impact on food and drink consumption

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KANTAR WORLD PANEL High definition inspiration





The **Buyer** of a product is often very different to the **End User**


...Looking within
the home to see
the complete
picture

Agenda

The broad impact of the
recession on in home
consumption

10 consumption trends in
10 minutes

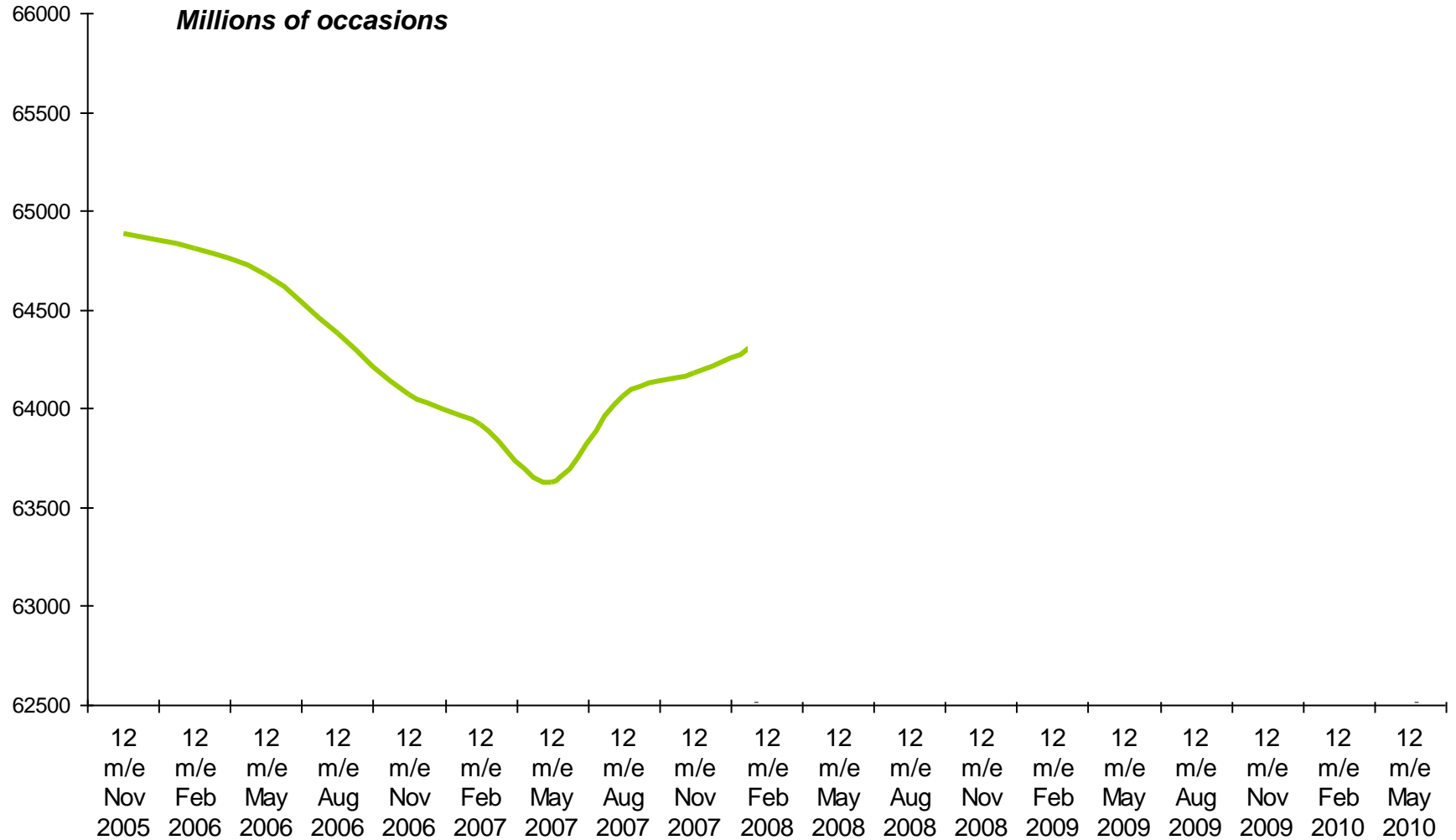




Staying in
is the new
going out

Food service decline

boosting our consumption in the home



Average cost per meal (per head)

Relatively low cost per heads have made eating in home a winning recessionary trend



Breakfast

43p



Lunch

£1.08



Tea time

£1.09



Evening Meal

£1.44



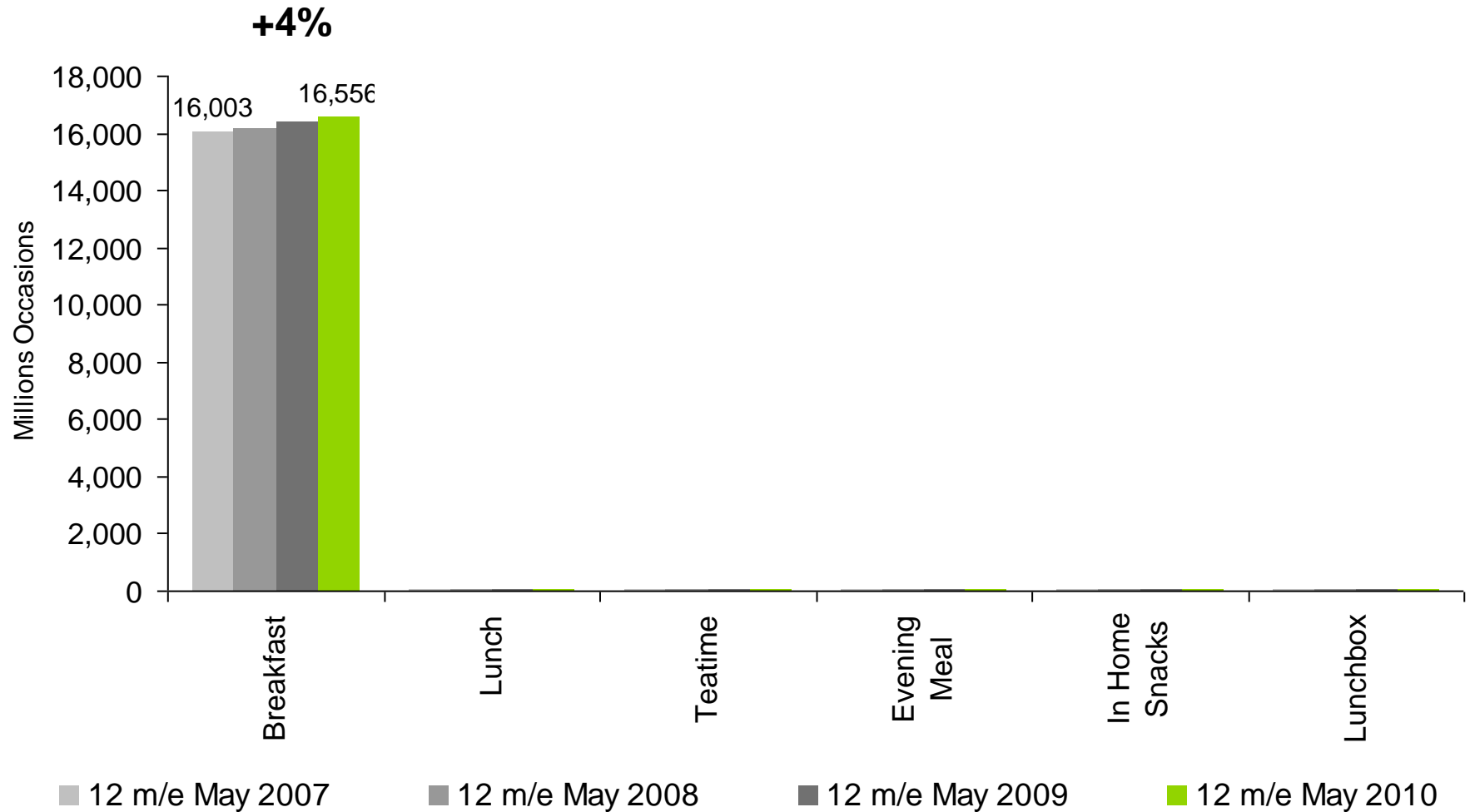
Snacks

85p

£5.76
evening
meal for 4

In Home meals winning as result of recession

More recent slowdown evident (outside of breakfast)



IN HOME WINNERS AND LOSERS

15 key consumption facts in 15 minutes



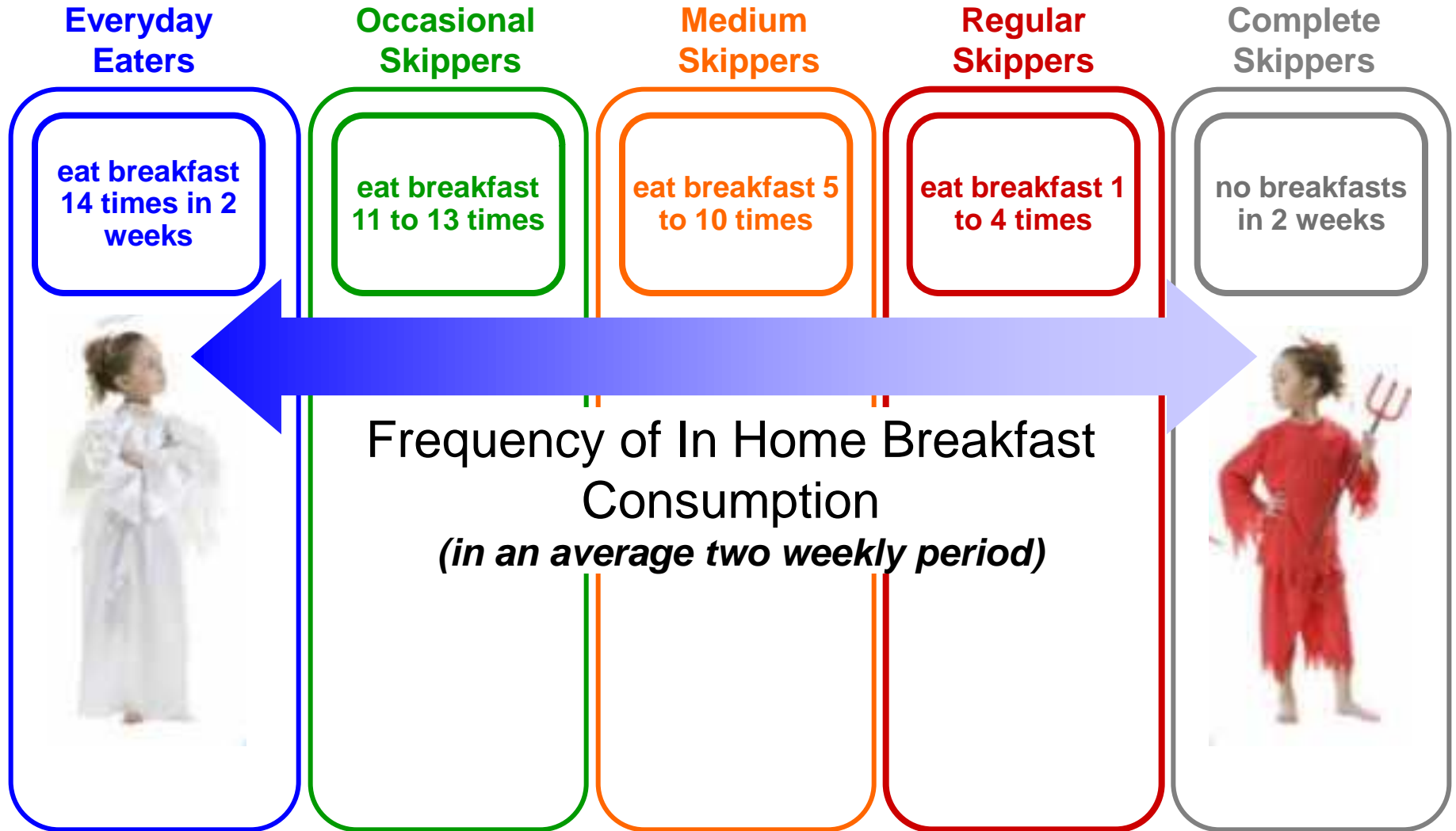
BREAKFAST CONTINUES TO GROW AS A KEY MAIN IN HOME USAGE OCCASION

Millions of occasions



**More emphasis
on starting the
day without an
empty stomach**

Breakfast Skippers



LUNCHBOX SERVINGS ALSO REMAIN STRONG BUT GROWTH HAS SLOWED

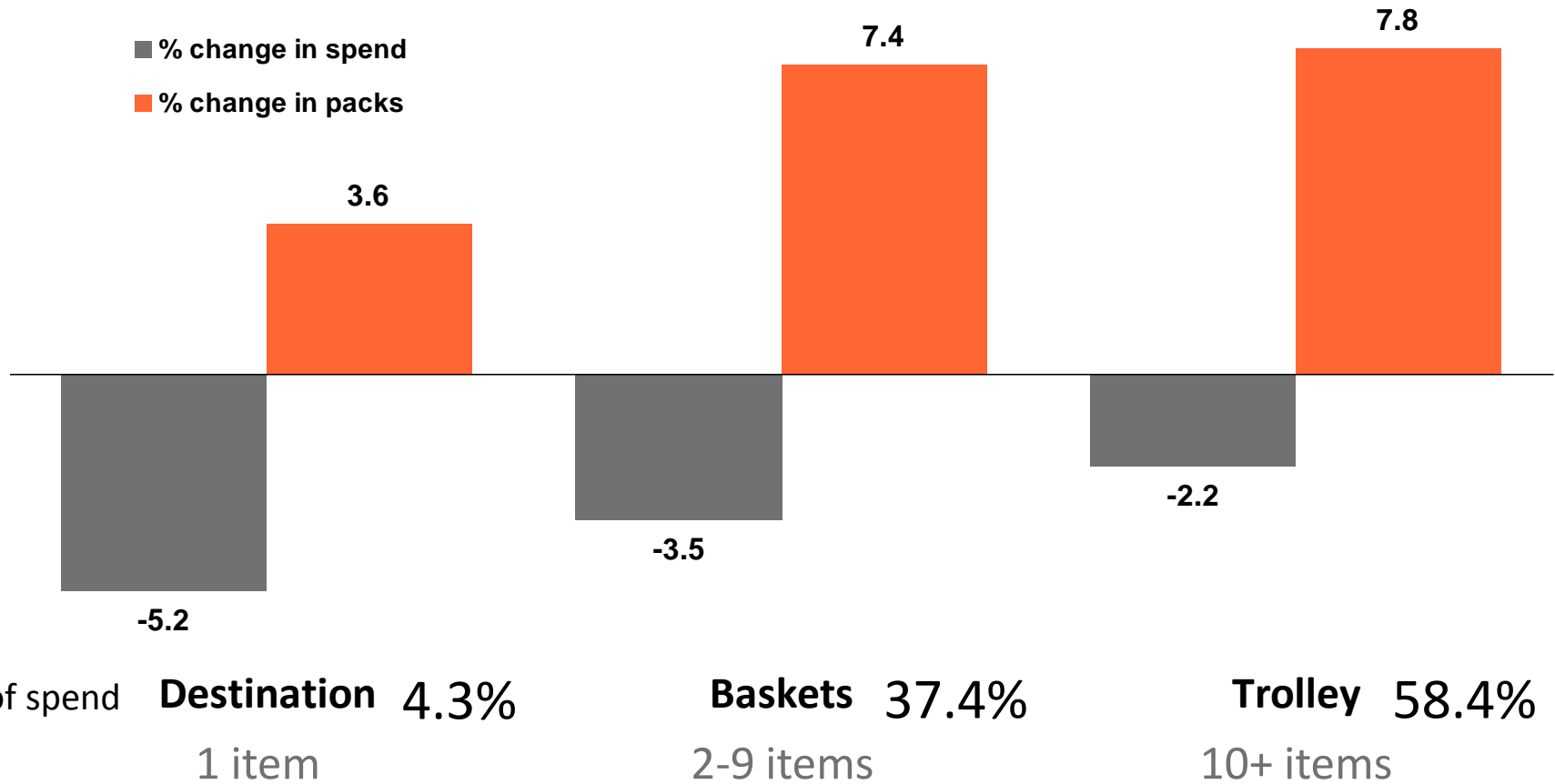
Millions of occasions



**Planning ahead
so consumers
become less
spontaneous**

Ireland: More emphasis on bigger baskets (planning ahead)

Shoppers are looking to plan ahead more, and this links into their more restricted store repertoire in 2010



GROWTH RETURN TO THE SNACK OCCASION

INDULGENT EVENINGS IN HOME SNACKING TRENDS

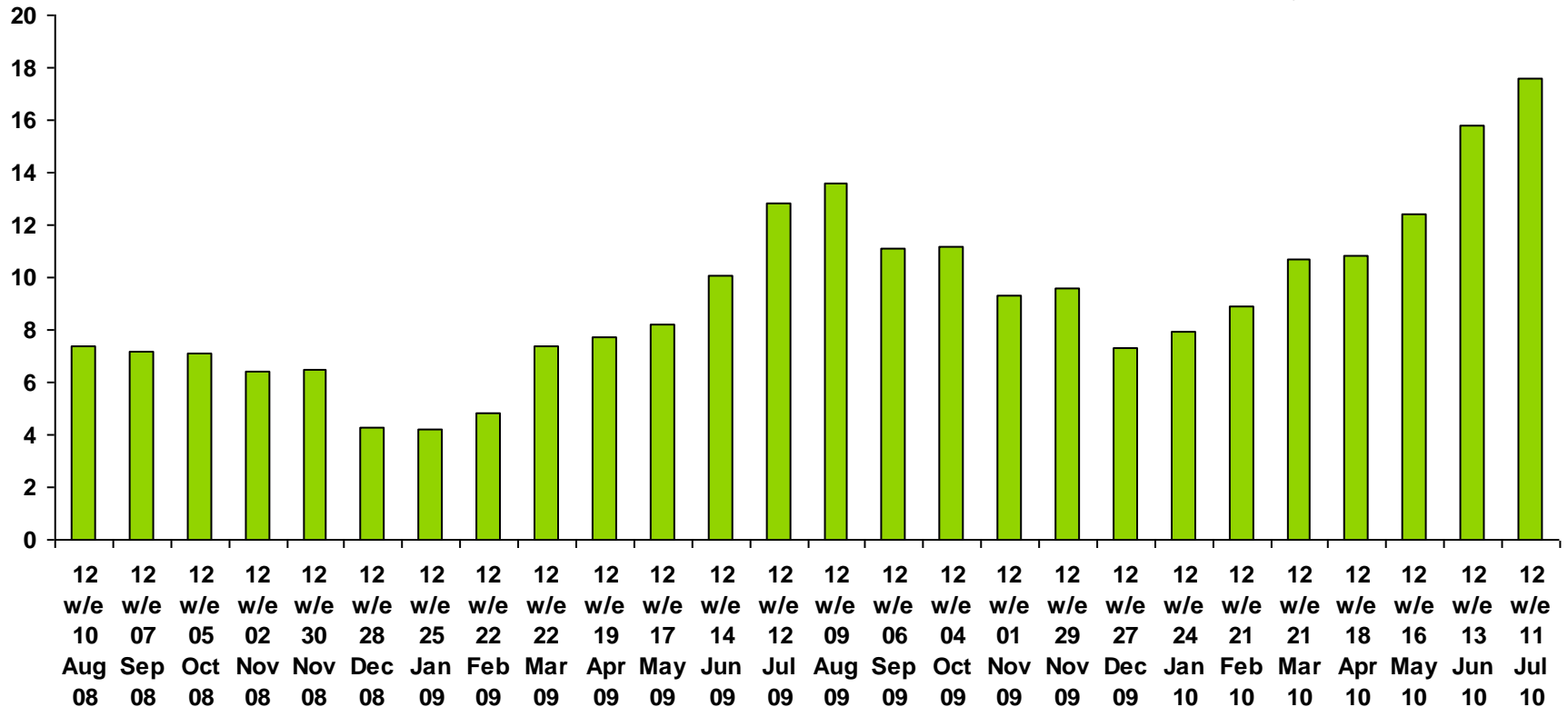
Millions of occasions (Food & Drink in home)



**In home snacking
driven by “what's
available”
Planning ahead
for treats**

Ireland: Chocolate Multipacks within Confectionery are taking more share than they ever have.

% share of confectionery volume



LINKS TO THE GROWTH AREA IN SNACKS

WHERE EVENINGS HAVE ALIGNMENT TO INDULGENCE

Morning



Afternoon



Growth area

Evening



Health

Enjoyment

HOMEMADE SAVOURY COOKING GROWTH IN 2010 AS CONSUMERS GET BACK TO THE HOB

Millions of servings – Homemade Savoury

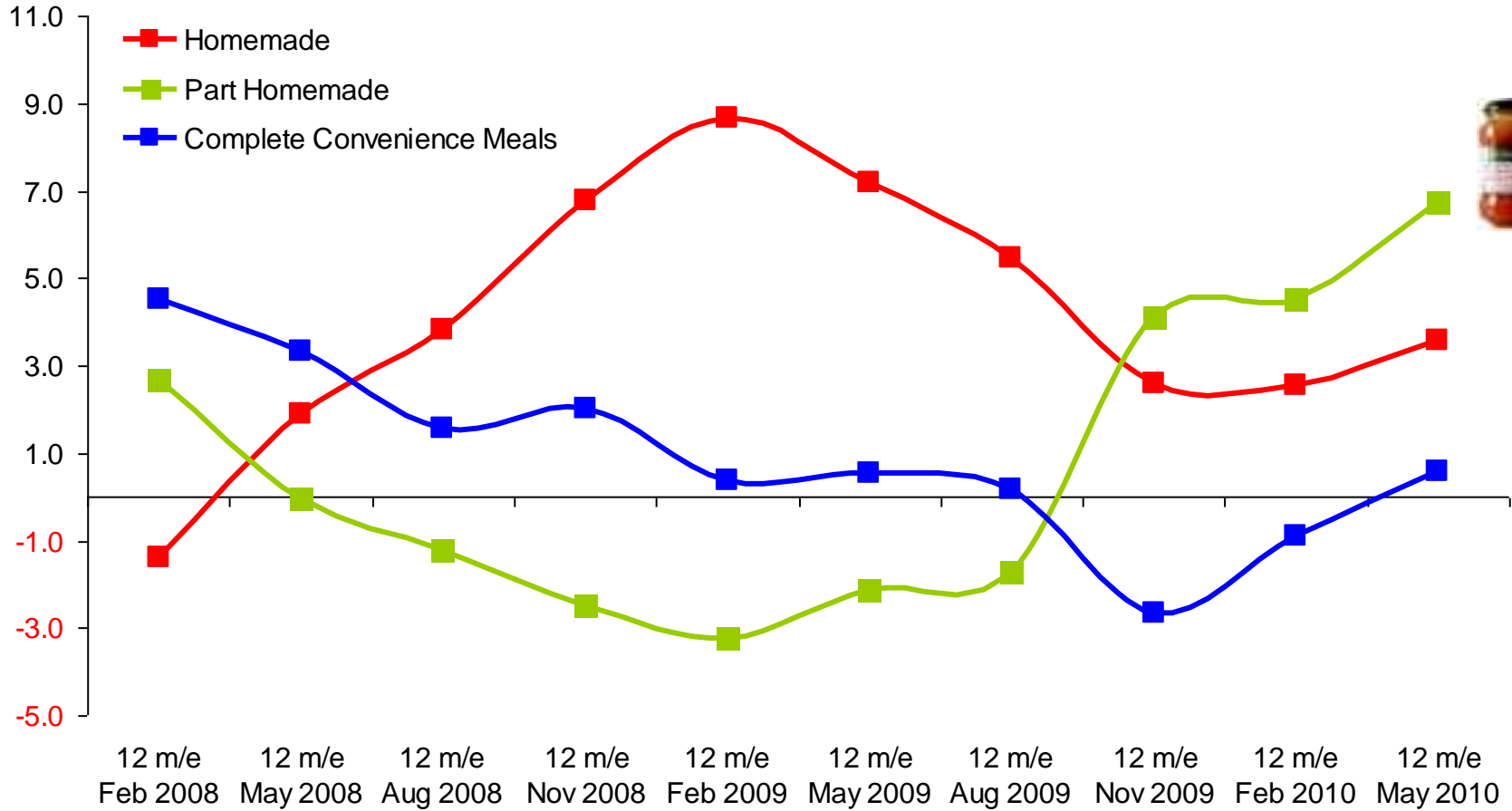


Consumers now far more open to being inspired and educated about how to prepare and cook food.

Movement to a more convenient method of 'scratch cooking'?

Year on Year Trends

% vs. LY



Ireland: Evidence mirroring GB consumer based trends

Shopper growth over the latest quarter to mid-year 2010

Home baking +218K

Wine +59K shoppers

Fresh Chicken +30K shoppers

Fresh Beef +15K shoppers

Shopper decline over the latest quarter to mid-year 2010

One shot drinks -110K shoppers

Hair colourants -76K shoppers

Hand wash products -44K shoppers

Special treats -39K shoppers

Herbal tea -18K shoppers

More essential

Less essential

GETTING MORE MILEAGE FROM FOOD WITHIN THE HOME A KEY THEME IN 2010

Millions of servings – 'Needed using up' as a motive



This links into component cooking as well as more focus on shelf life

VISIBILITY OF PRODUCT IN-HOME ENCOURAGES INCREASED USAGE (PARTICULARLY INCREMENTAL SNACKING CONSUMPTION)



42

**That's how many chances you
have each week to stand out in
the Fridge**

24

in the Cupboard

8

in the Freezer

Number of visits per week to fridge/cupboard/freezer

With Eating in the new eating out.....



There is increased pressure to stand out from the crowd

EATING TOGETHER TAKES MORE FOCUS AS 1 SITTING OCCASIONS GROW IN 2010

Millions of servings – 1 sitting at the evening meal occasion



**More relevance
for 'one size fits
all' meal solutions
and food as more
of a social
gathering again**

IN HOME ENTERTAINING BECAME MORE IMPORTANT TO CONSUMERS IN 2010

Millions of servings – 'Social/ Entertaining' as a motive



Links into the decline in out of home dining

HEALTH AS A MOTIVE FOR CONSUMPTION WITHIN THE HOME HAS RESUMED GROWTH

Millions of servings

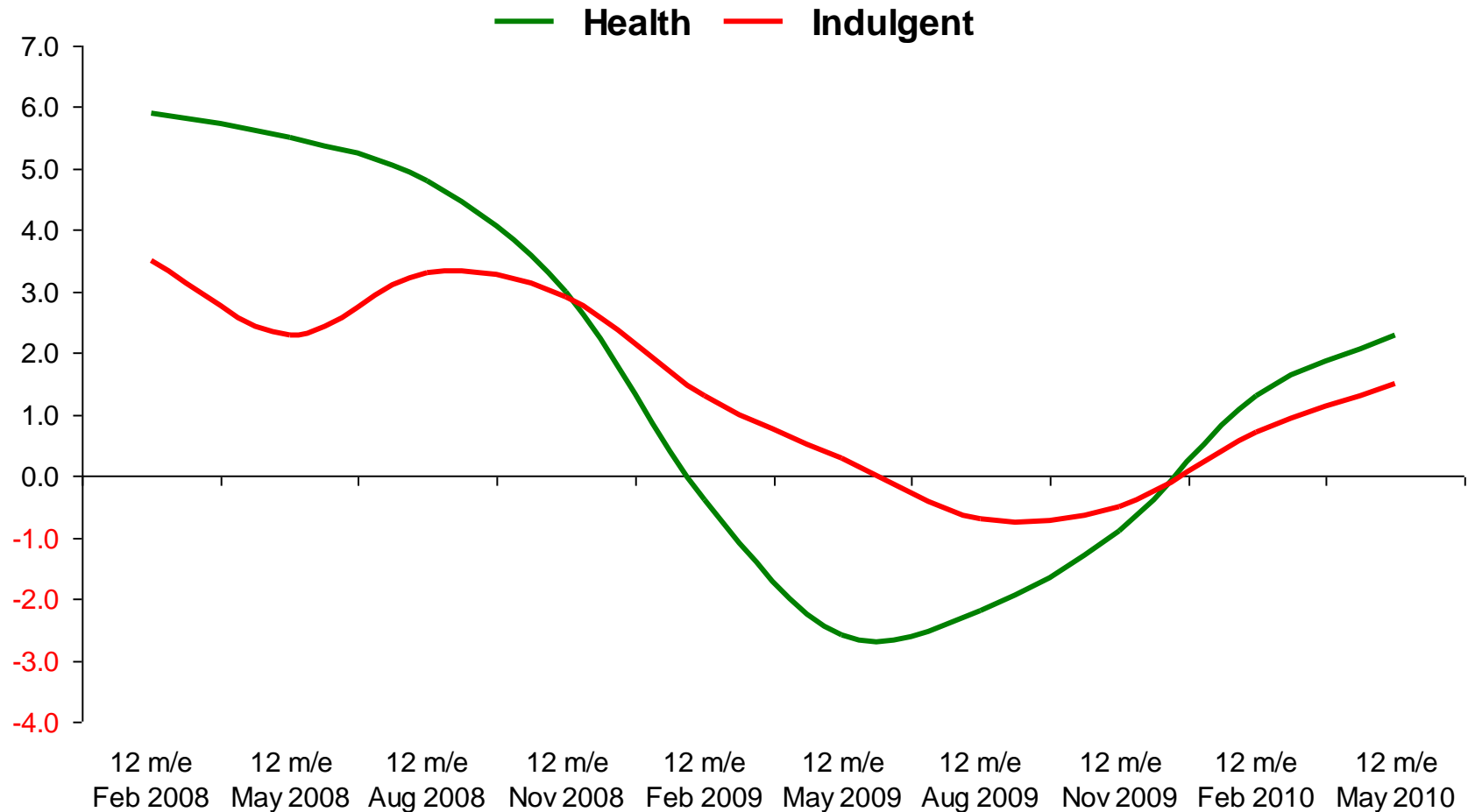


**Health more
front of mind
(again) as we
emerge from
recession**

Health outgrowing indulgence for the past 2 periods

Health vs. Indulgence Trends: Yr-on-Yr Growth

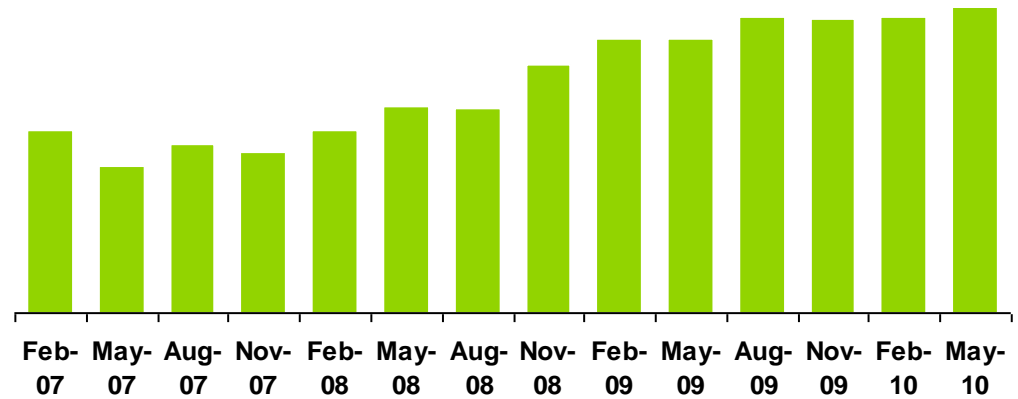
Health vs. Indulgence - Millions Servings (YOY Growth)



FAMILIAR CHOICES

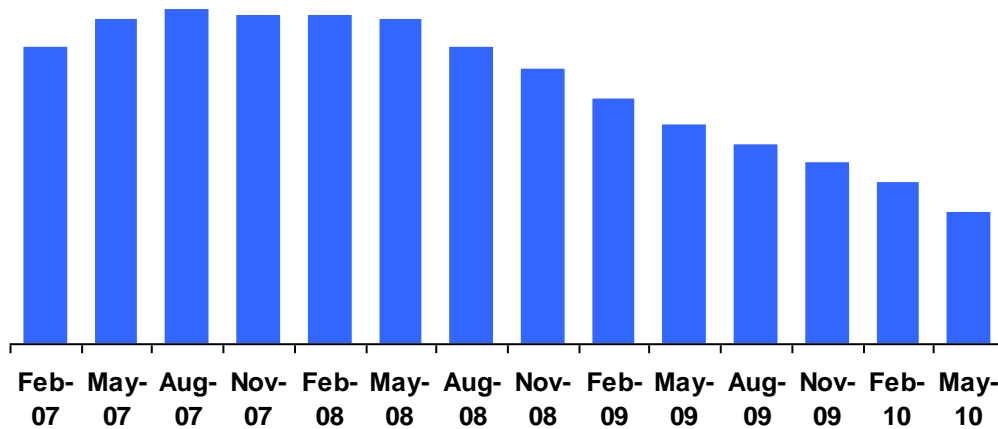


■ Consumption for Favourite

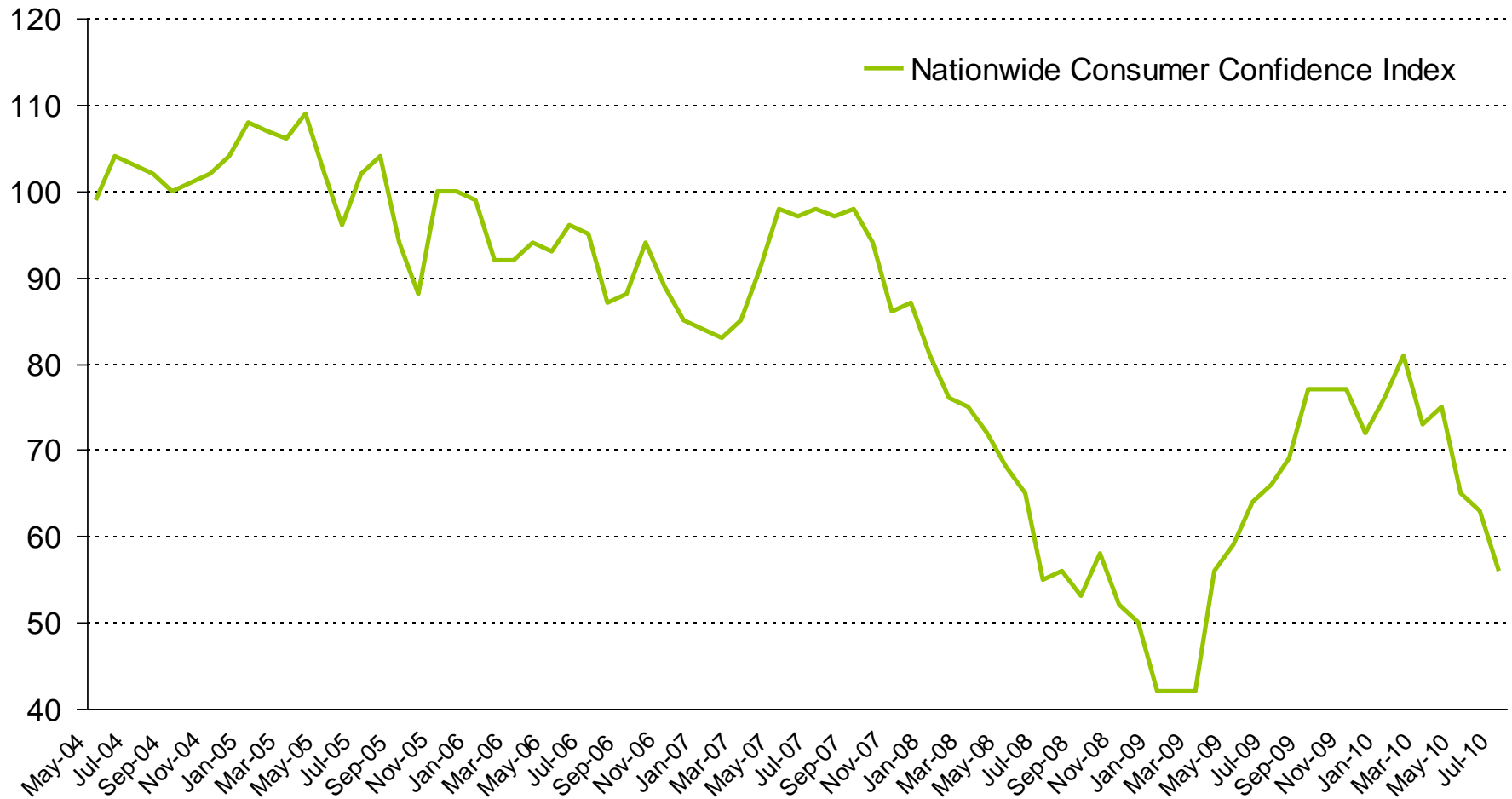


...rather than the risk of change

■ Fancied a change



Confidence plummets after the General Election



Source : TNS-Ri research for Nationwide

Flexibility Is a virtue



Consumption is changing - Opportunities for incremental volume by maximising all potential meals

As we (come out) of recession ...

Before

Eating out

Health concerns

Organic / Fair trade

Premium / Treating

**Ready Meals &
Convenience**

During

**Eating in is the new
eating out**

**Can't afford to eat
healthily**

Charity begins at home

Value

Homemade

After

Return to eating out

**Return of health
concerns**

**Affordable organic,
Fairtrade & local**

**Treating returns
'Mix & Match' premium**

Part Homemade

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