

A look at current behaviour & attitudes towards food UK

Grace Binchy
11th February

I  the consumer



PERIscope2013



Consumers & Their Food
An Insight into 10 Markets



Understanding Millennials for Better Connections

Consumer trends



A Foodie World

Back to Basics

Shopping Around

Health & Wellbeing

A FOODIE WORLD



“I want to get more enjoyment from the simple things in life; to have experiences that add more fun and meaning”



- For many the economic crisis has created a sense of disconnection and a feeling that life is less fulfilling.
- As time has gone on people have started to discover the value of what they still have rather than mourn what they have lost.
- Food remains one of life's simplest, accessible and social pleasures.
- Greater emphasis on new hobbies



Increasingly people are taking up more hobbies...



- Percentage of people who have undertaken cookery courses in the last number of years has grown significantly
- Consumers believe it is important to learn new things in their lives

There is a growing enjoyment around cooking

% Good Fun

% A Passion

Attitude towards cooking

2005

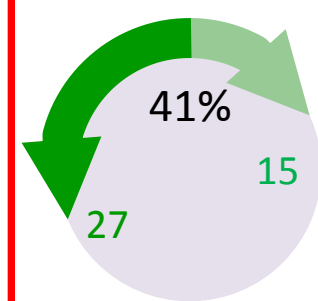
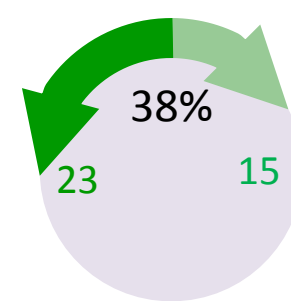
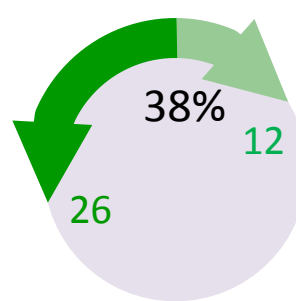
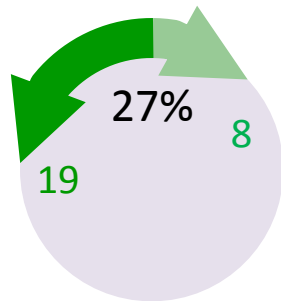
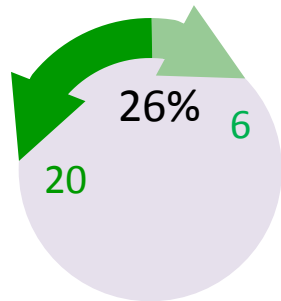
2007

2009

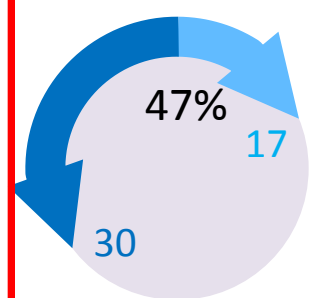
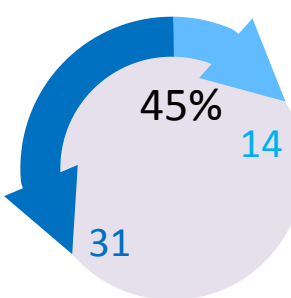
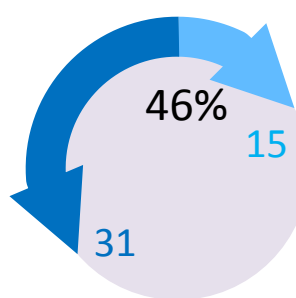
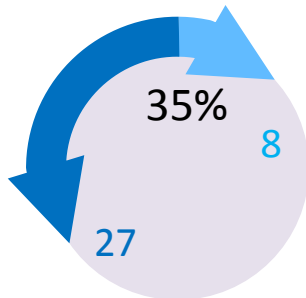
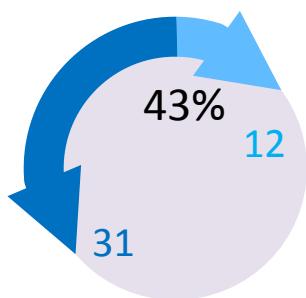
2011

2013

ROI



GB



Interest in cookery classes

% who have attended/taken cooking classes in the past three years



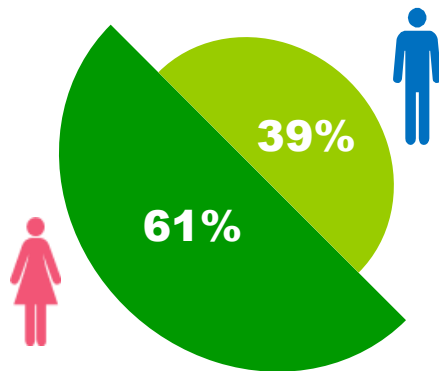
Confidence in cooking expertise



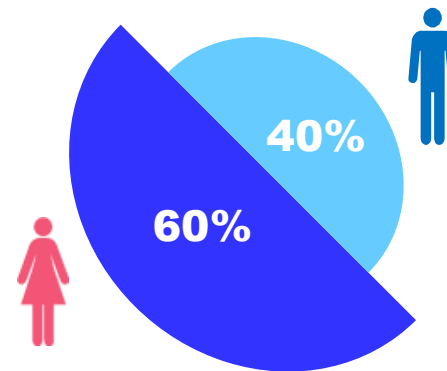
Who is cooking the main meal?

Gender breakdown of those mainly/jointly responsible for main meal preparation

ROI



GB



My children have more interest in cooking compared to my generation

22%

2011

25%

2013

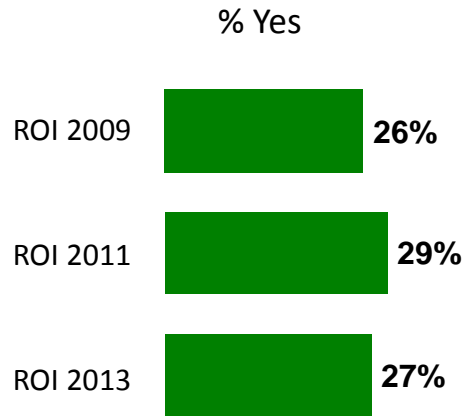
27%

2011

15%

2013

Entertaining at home less often

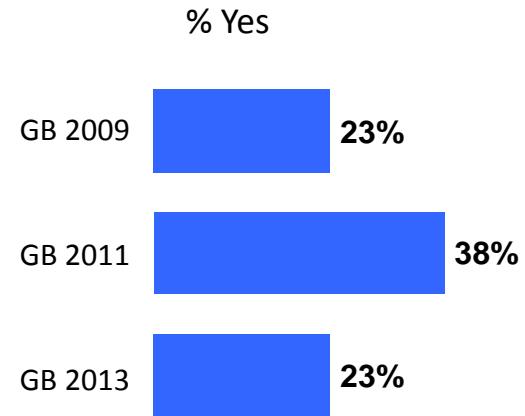


Yes



Higher Amongst:

- Females
- 35-44 yrs
- ABC1's
- Can cook
- Have children



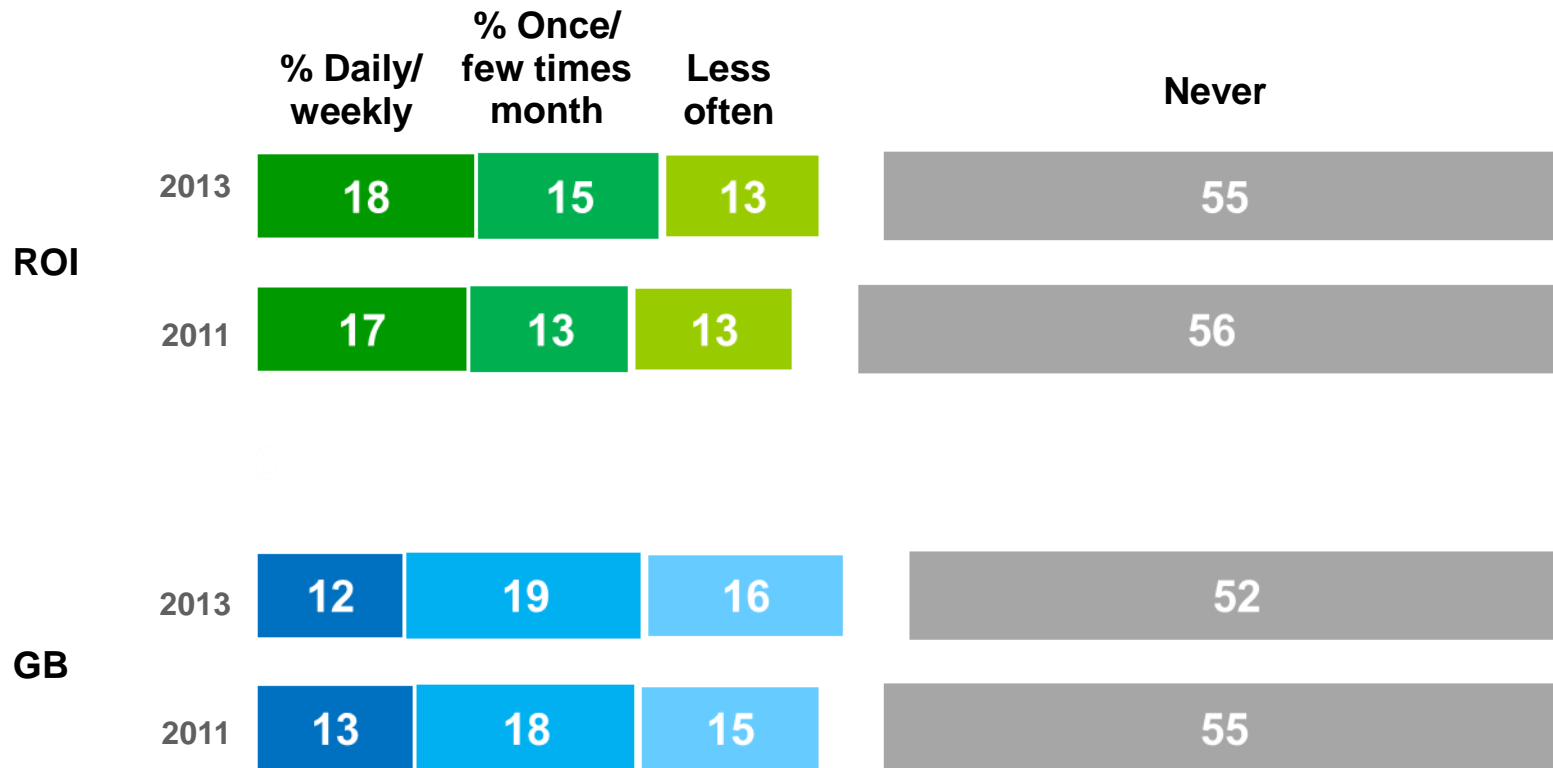
Yes



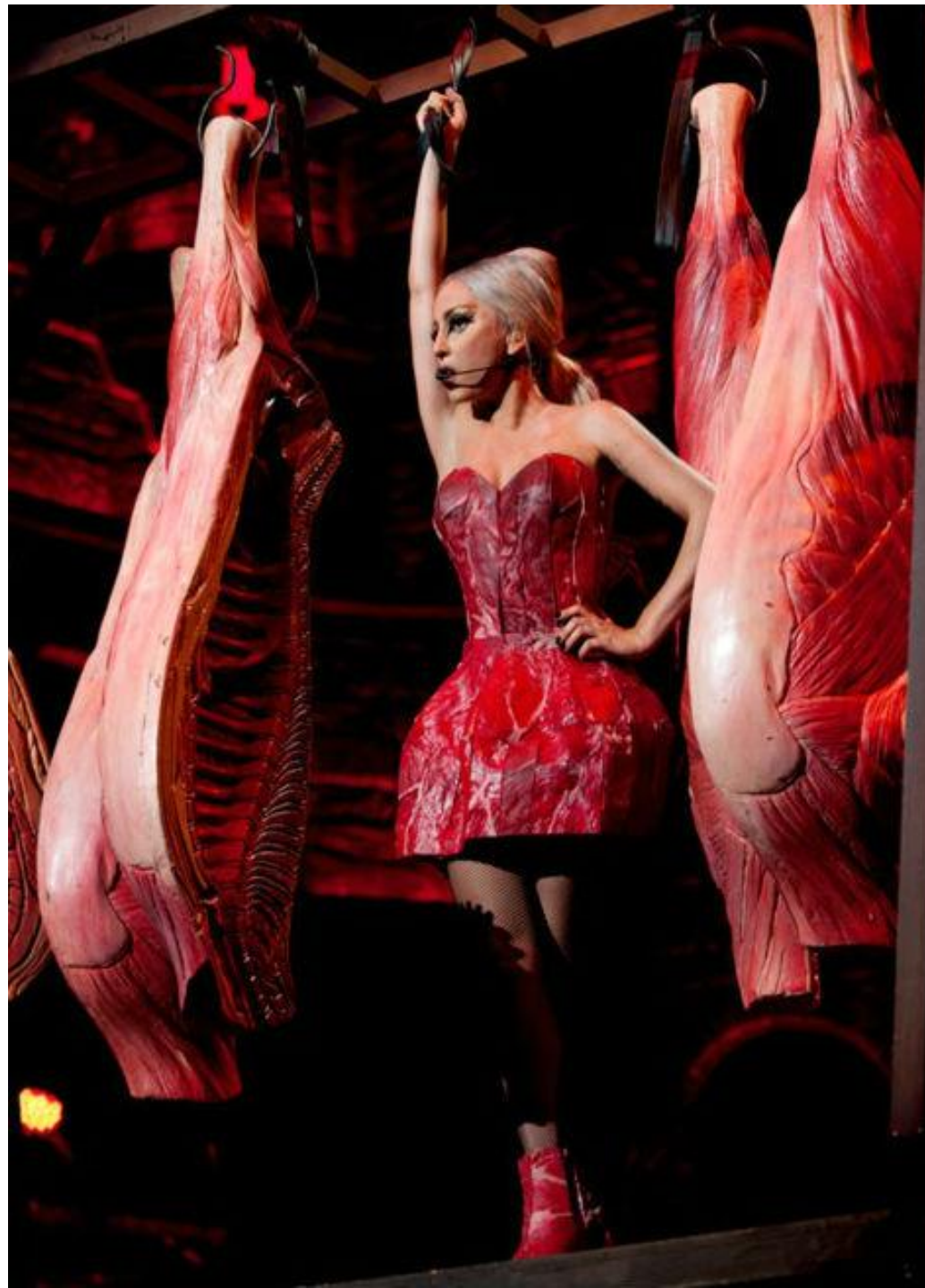
- 25-44 yrs
- AB
- 3+ households
- Have children
- Can cook
- Housewife

The Great Bake Off?

Baking from scratch



Millennials have firmly added food and drink as a way of expressing who they are becoming.



*Technology is
fueling a new
Foodie visual
culture.*



PHOTO



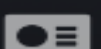
daviddeeley

29s

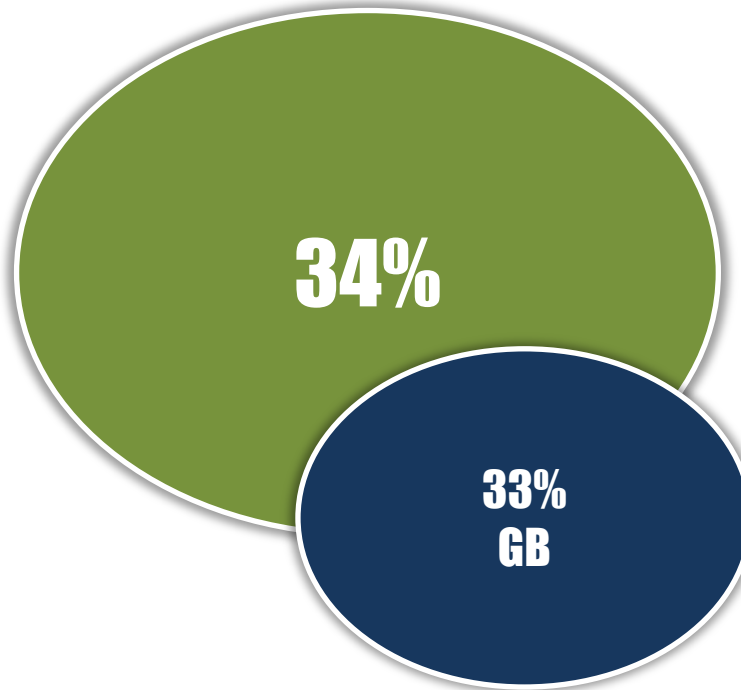


Like

Comment



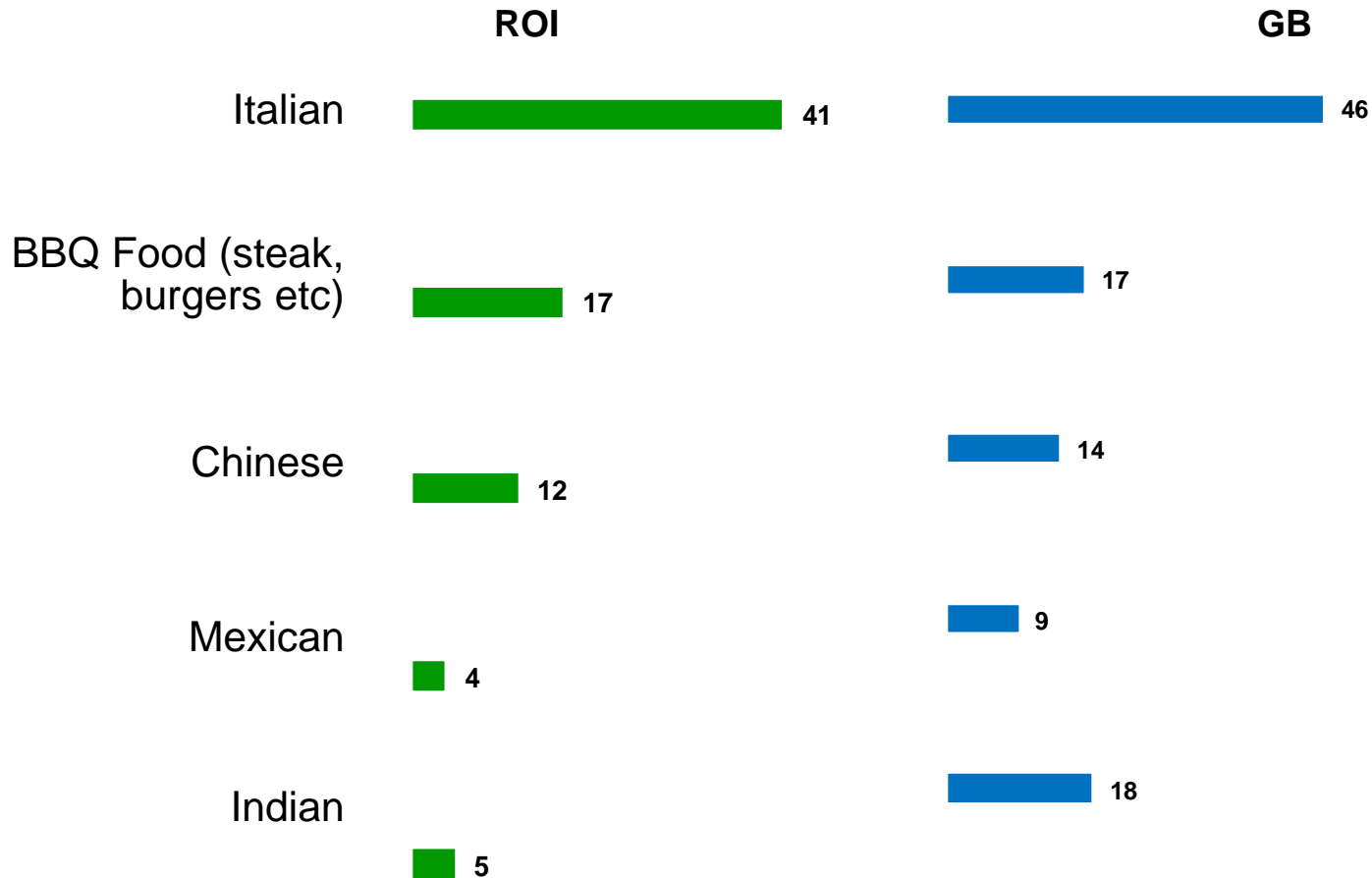
Shopping Motivations



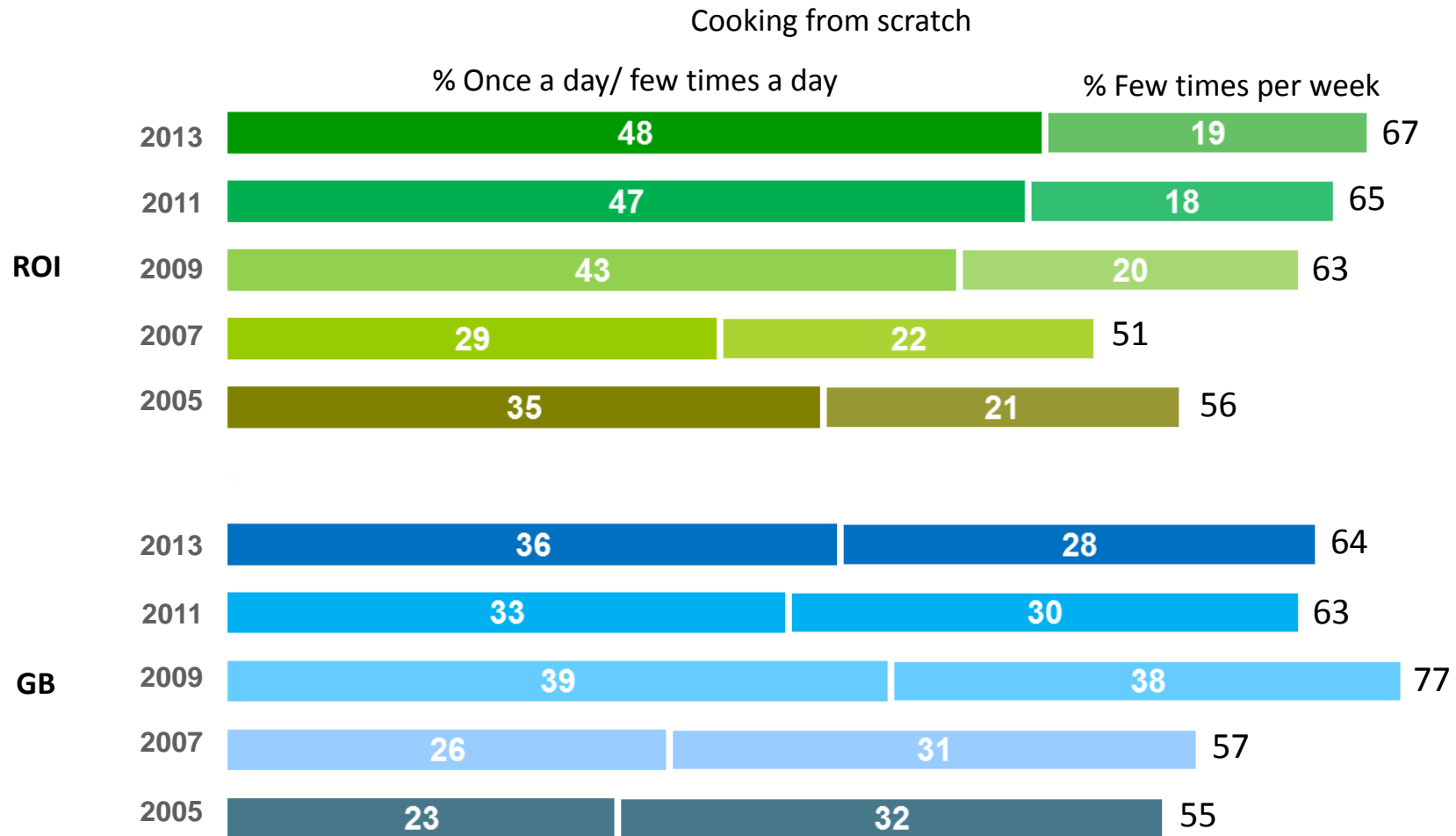
*They shop because 'Wanted to pick up ingredients for a new recipe I was trying out'
compared to 28% of Gen X and 20% of Baby Boomers*

What are we eating?

% Top five cuisines prepared in the home weekly or more frequently



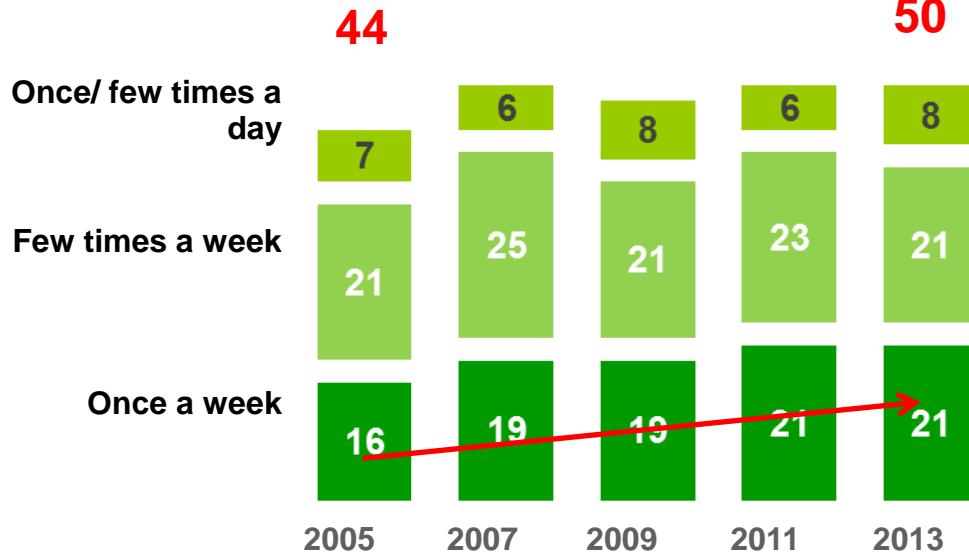
Scratch cooking on the increase



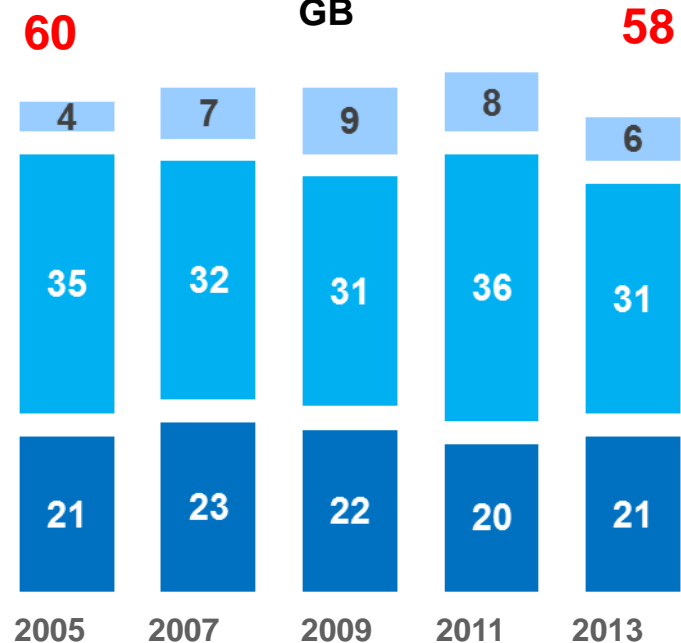
Usage of ready prepared ingredients

Usage of ready prepared ingredients

ROI

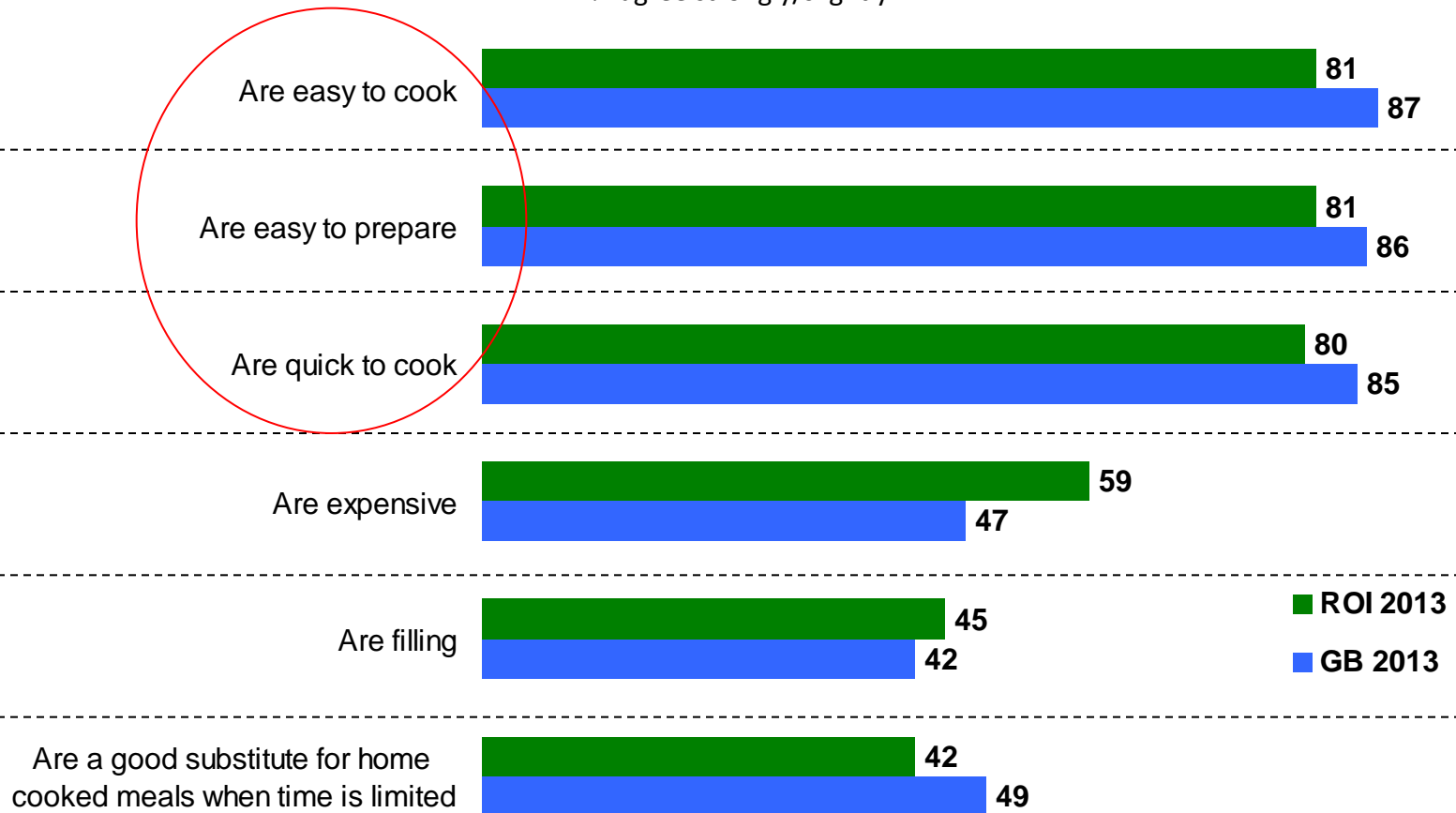


GB



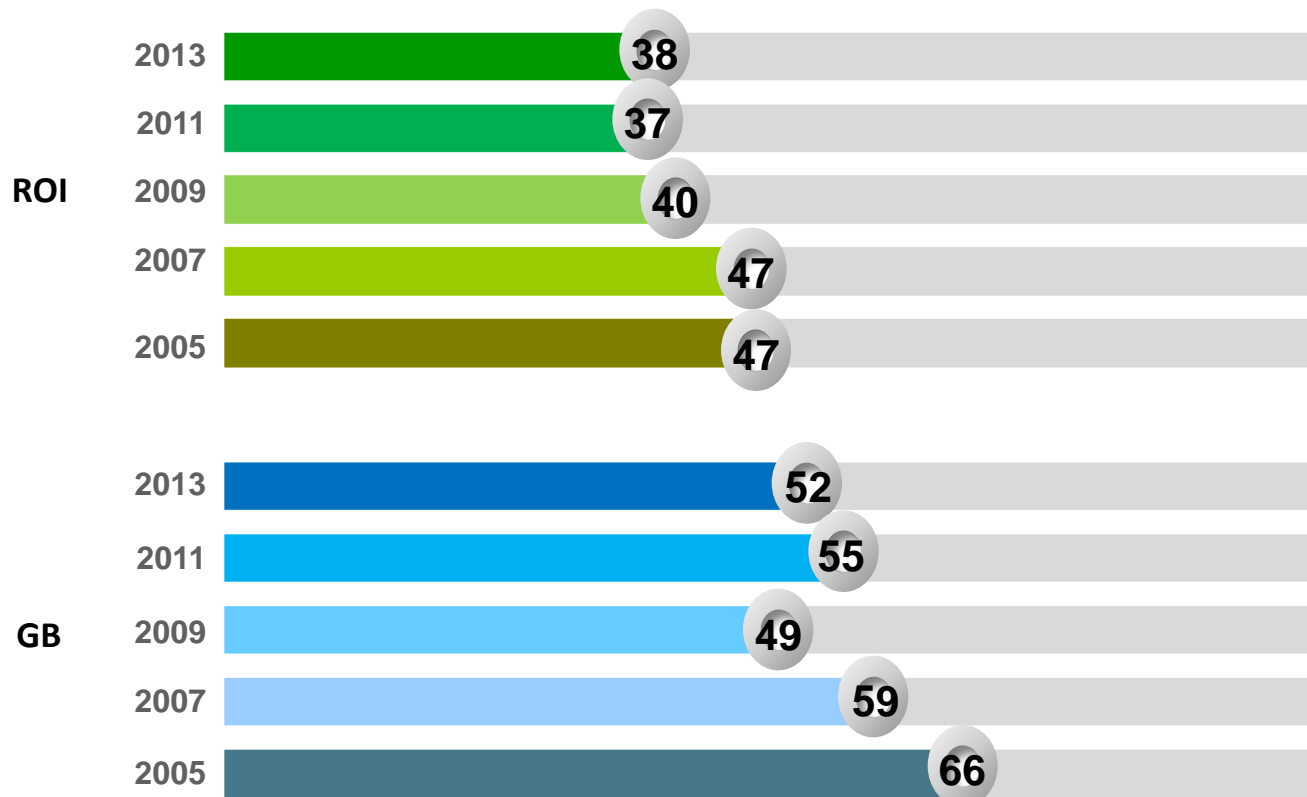
Busy Lives

% agree strongly/slightly



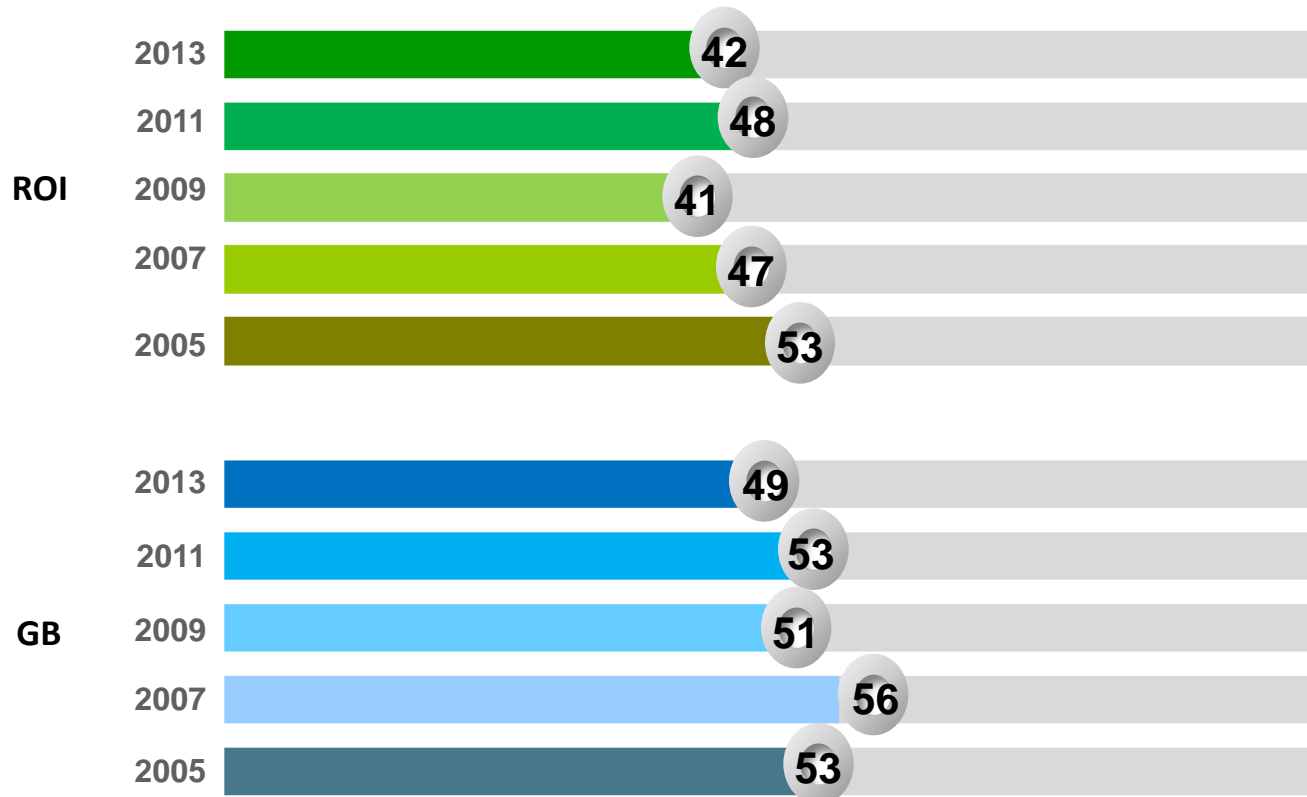
Decline of ready to eat foods

% agree 'we use a lot of ready to eat foods in our household'



..and is still seen as something of a substitute

% agree that convenience meals... *'are a good substitute for home cooked meals when time is limited'*



BACK TO BASICS



Keeping it real

“I am looking for products and brands that are real, authentic and honest, because I know I can trust what's in them and where they come from”

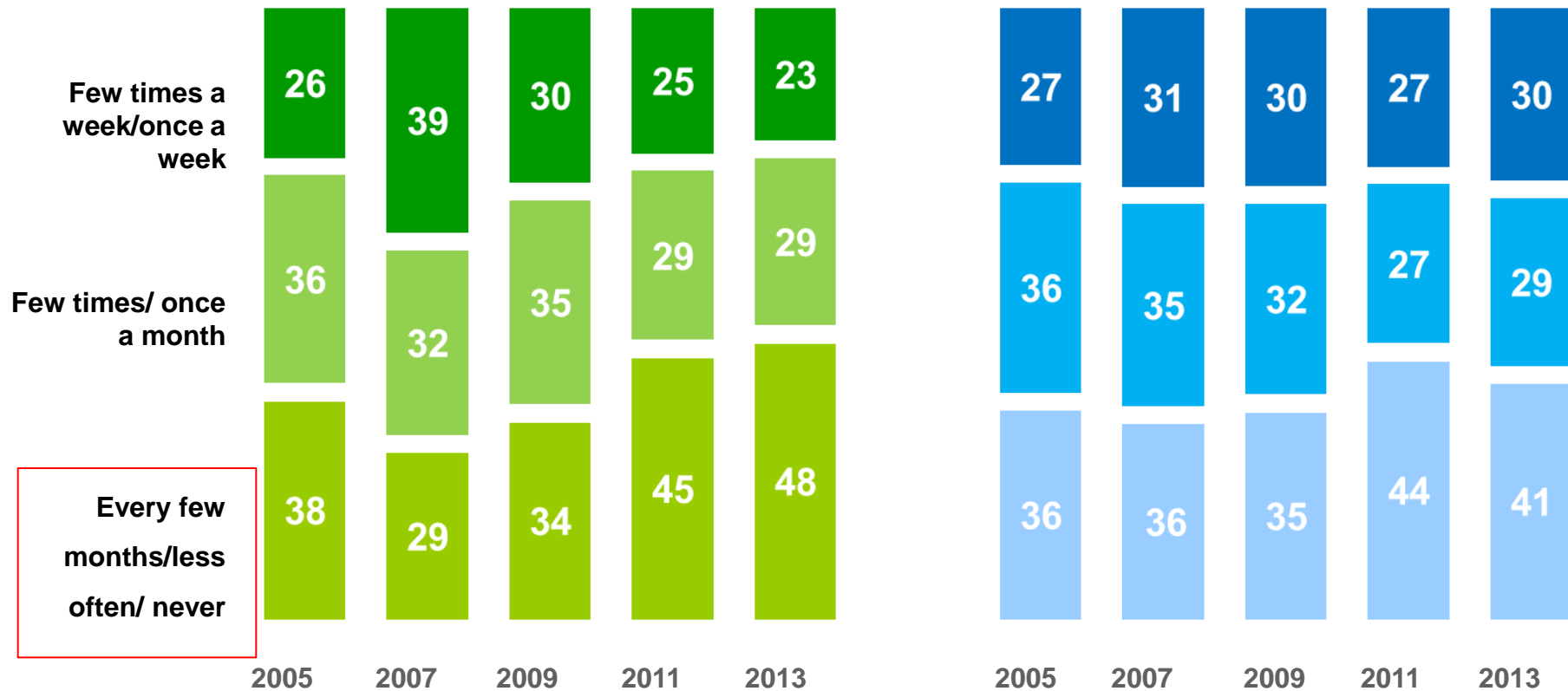


Eating out of home

Frequency of eating out of home

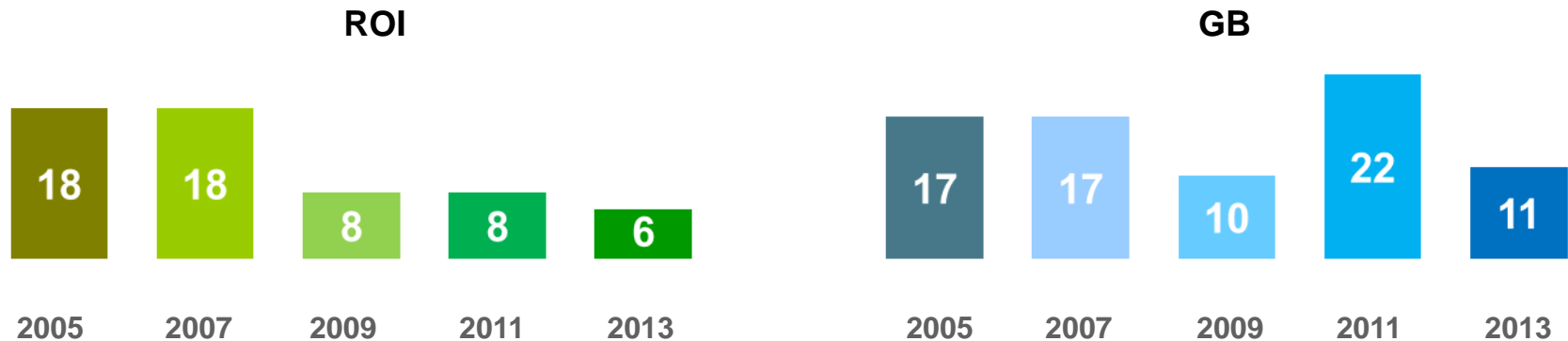
ROI

GB

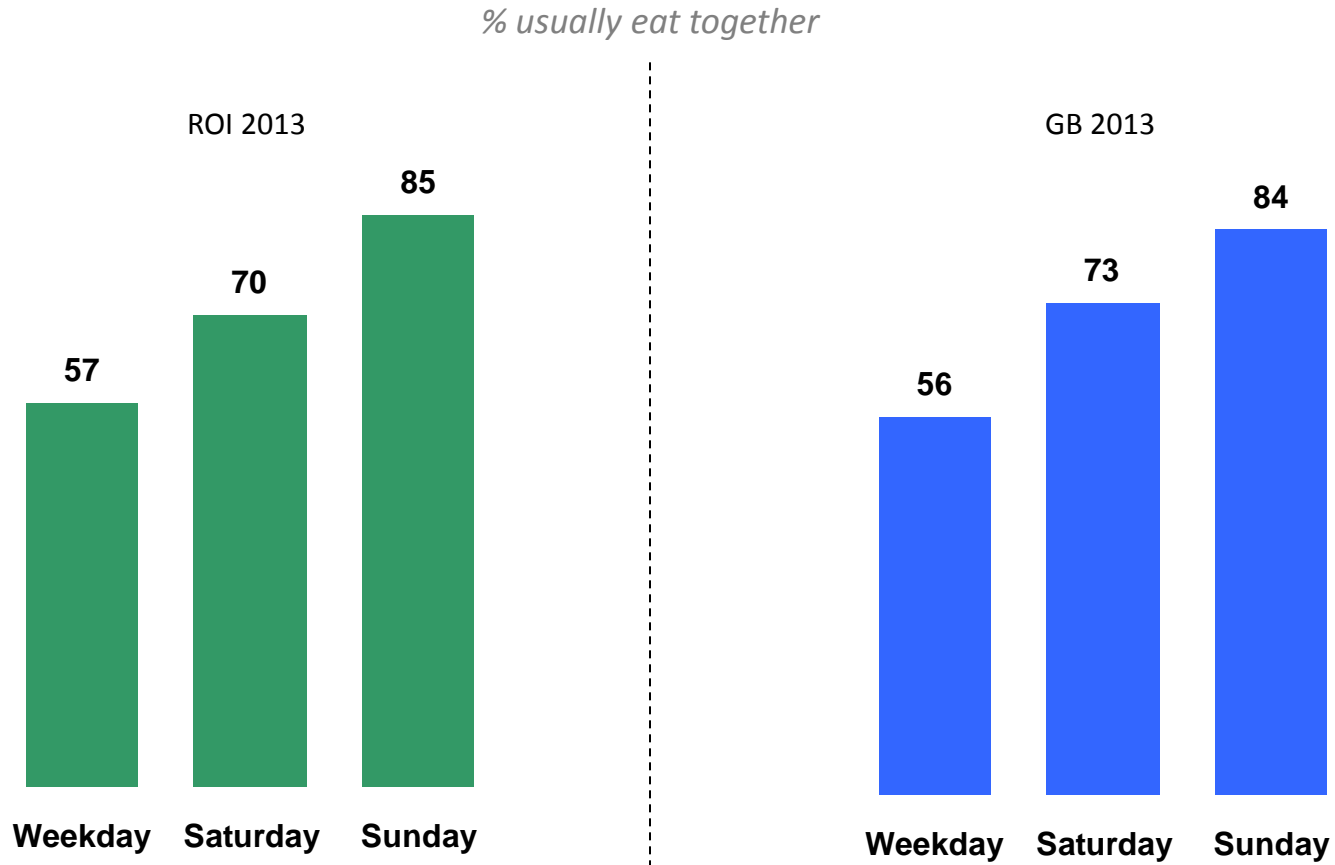


Eating out during the week

% who are eating out more often during the week

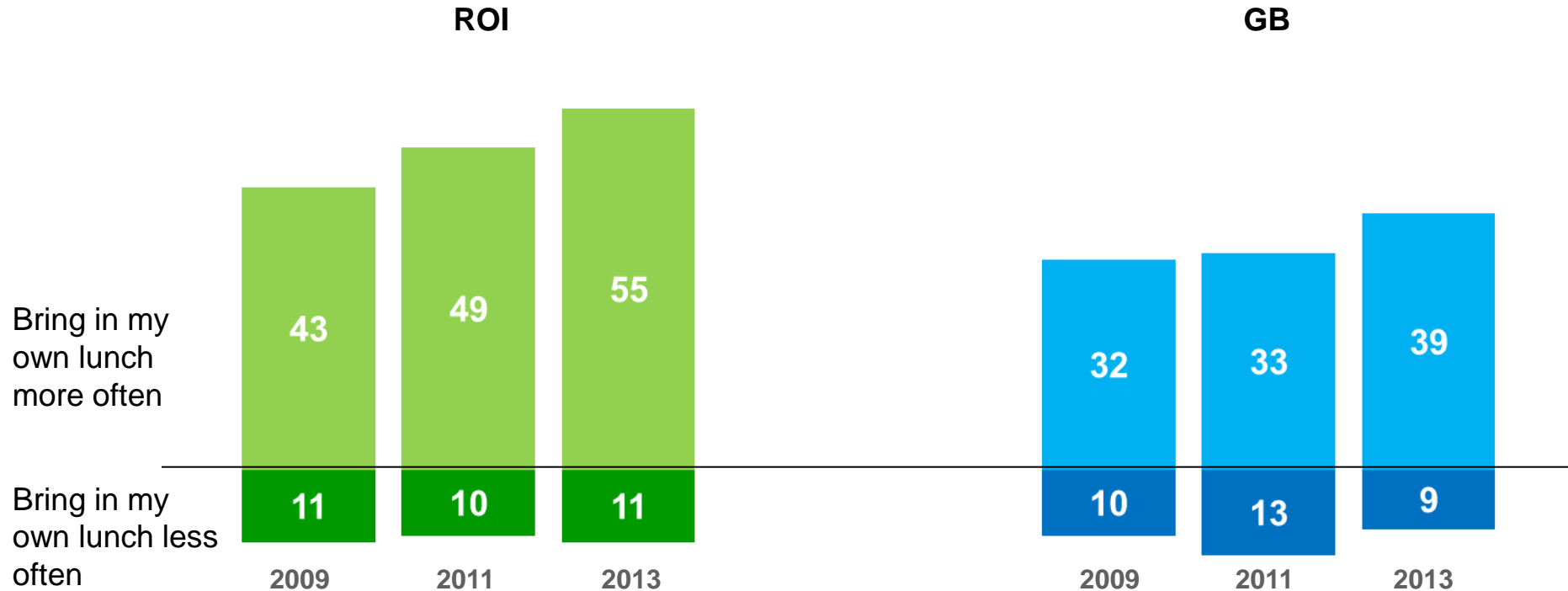


Eating together as a family



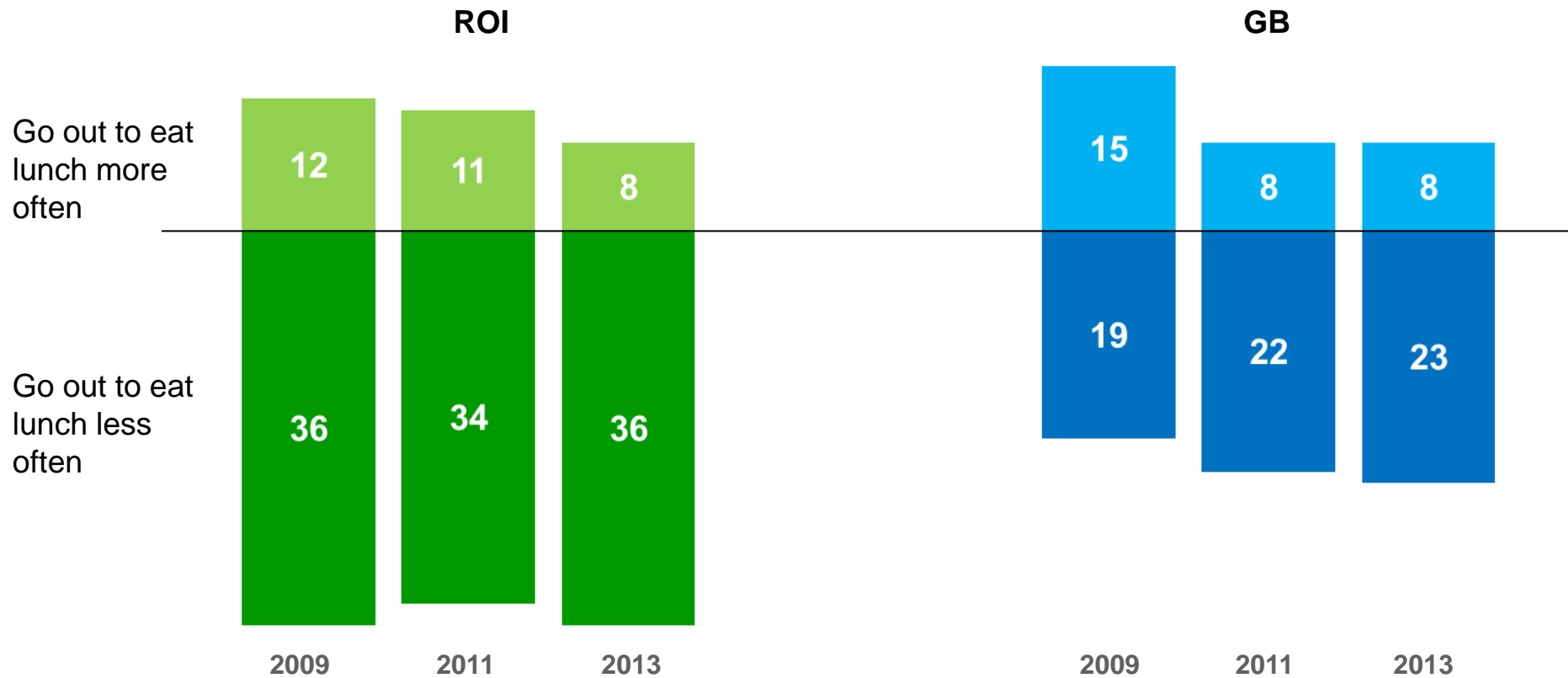
Bringing lunch to work

% who bring in their own lunch more often/ less often



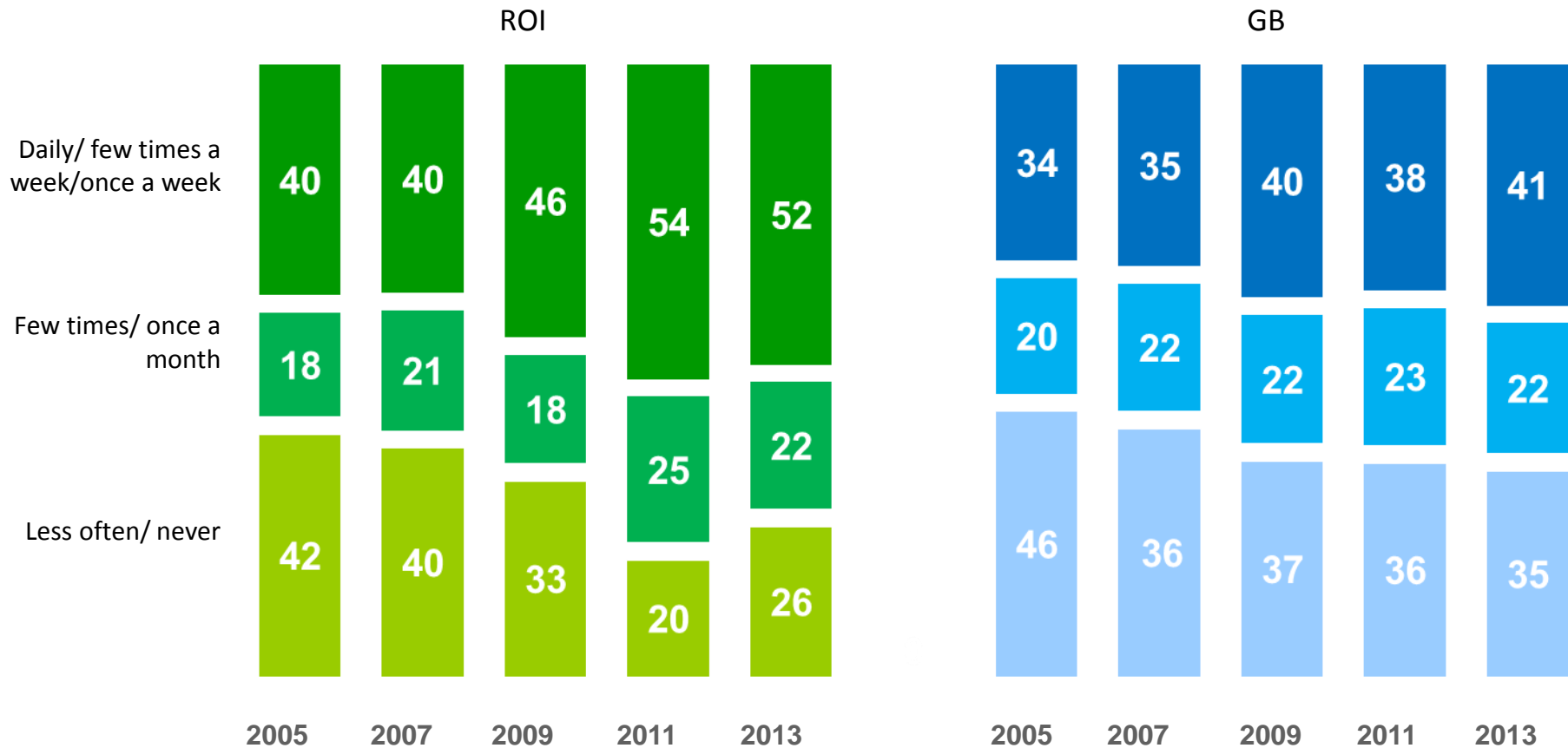
Going out for lunch

% who go out to eat lunch more often/less often



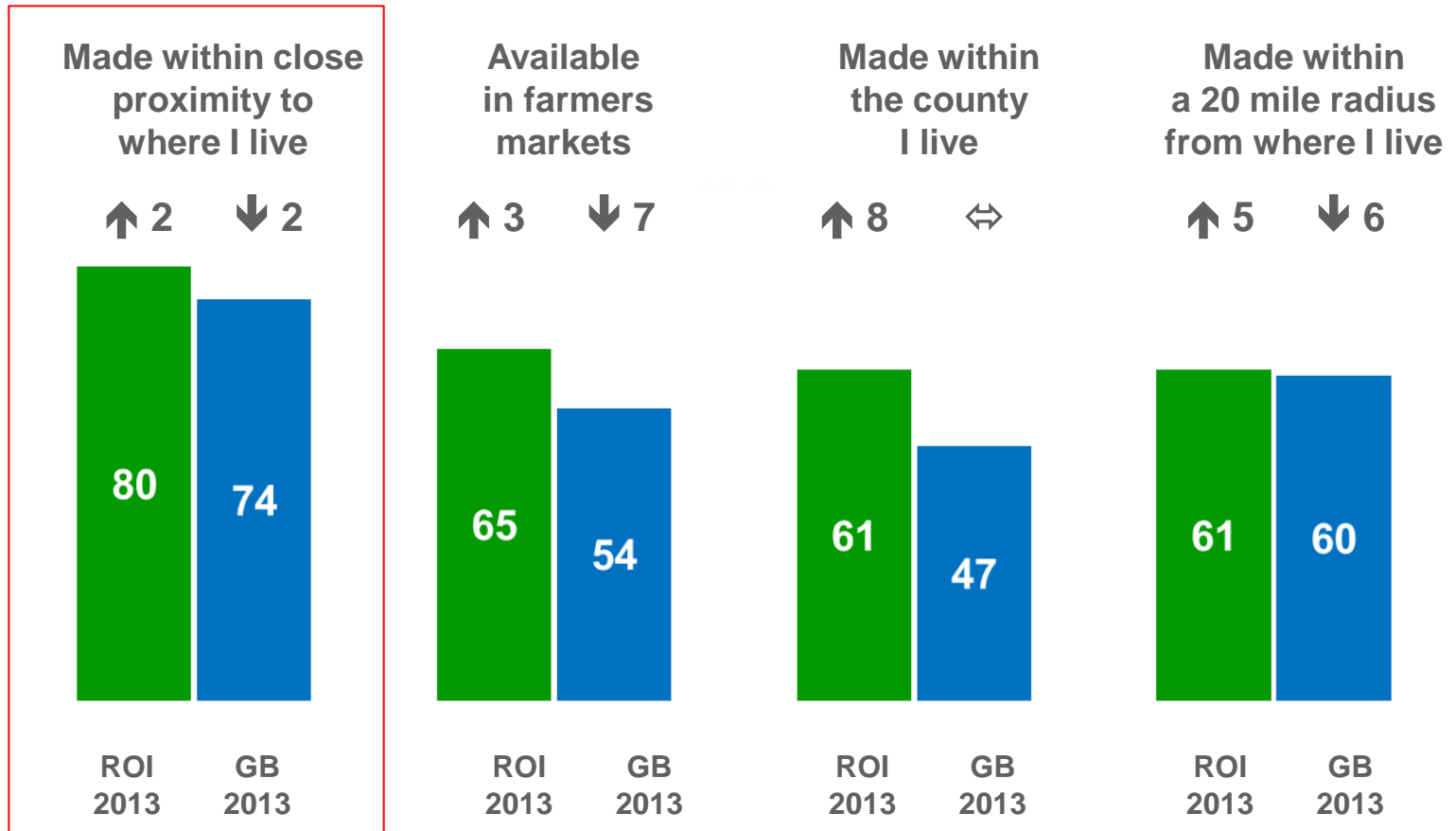
Buying local foods

Frequency of 'local food' purchases



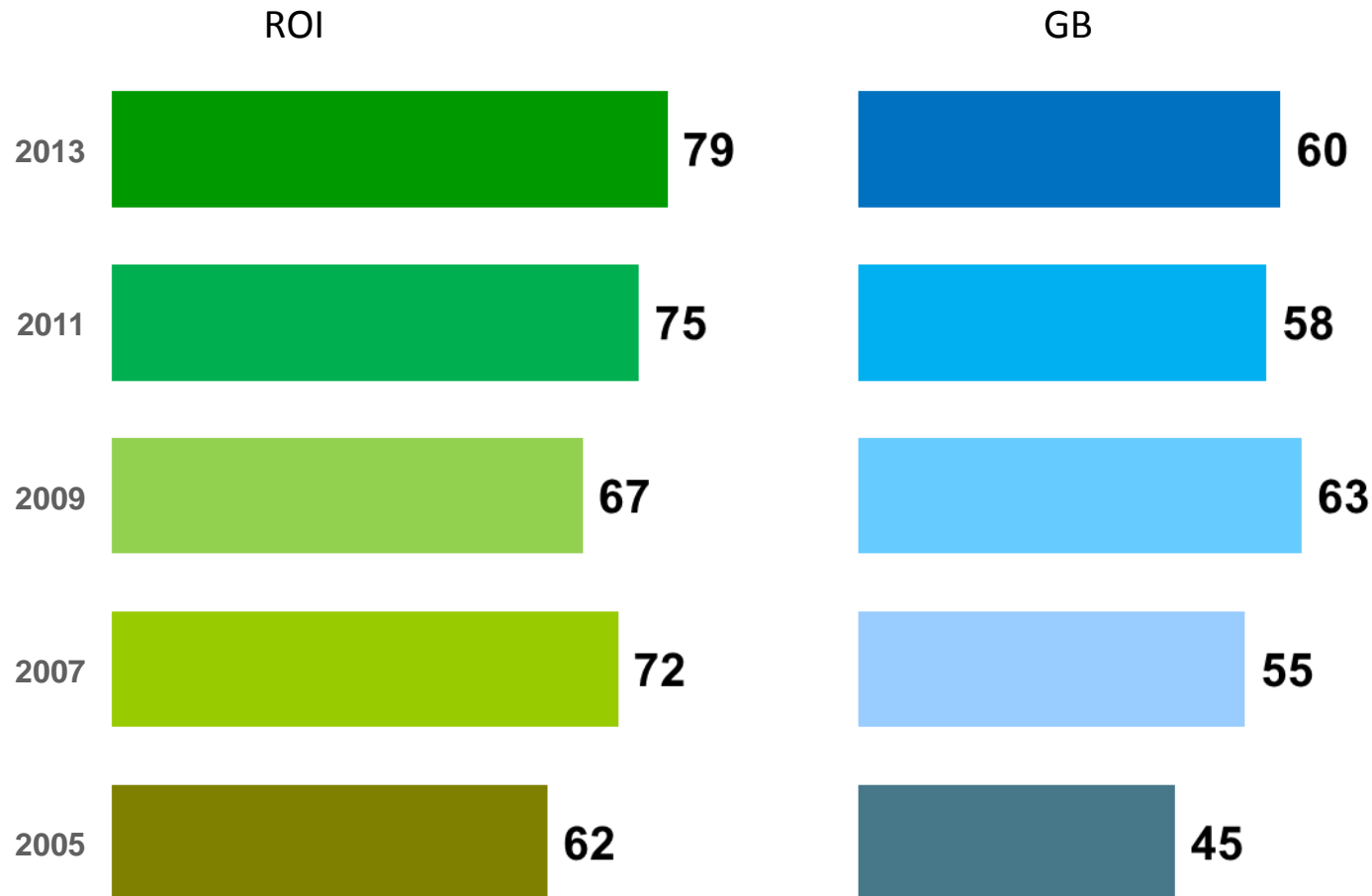
Definition of local food

Defining what 'local food' actually means
Total%



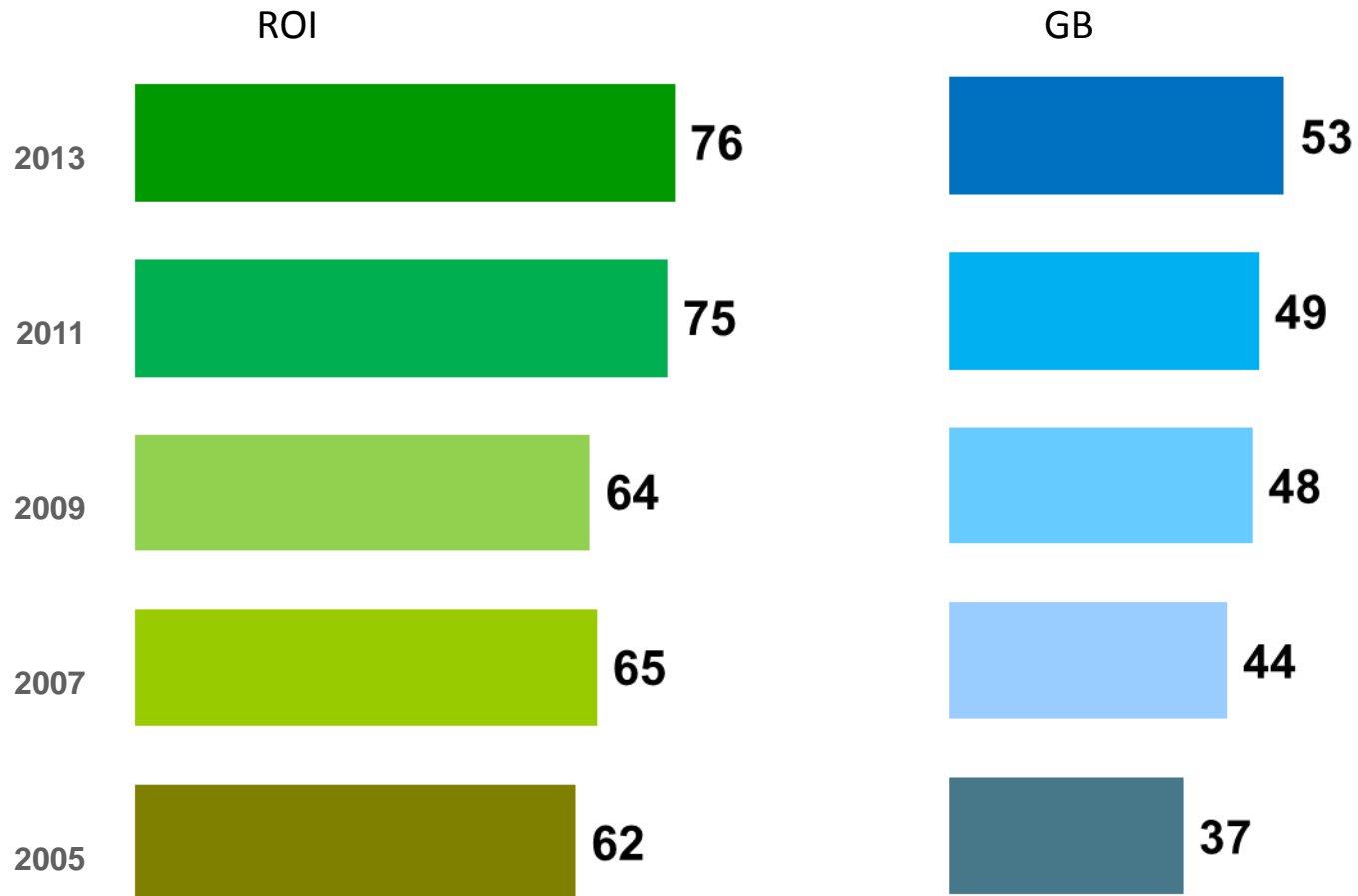
Local products are of a superior quality

% agree that food produced locally results in higher quality products



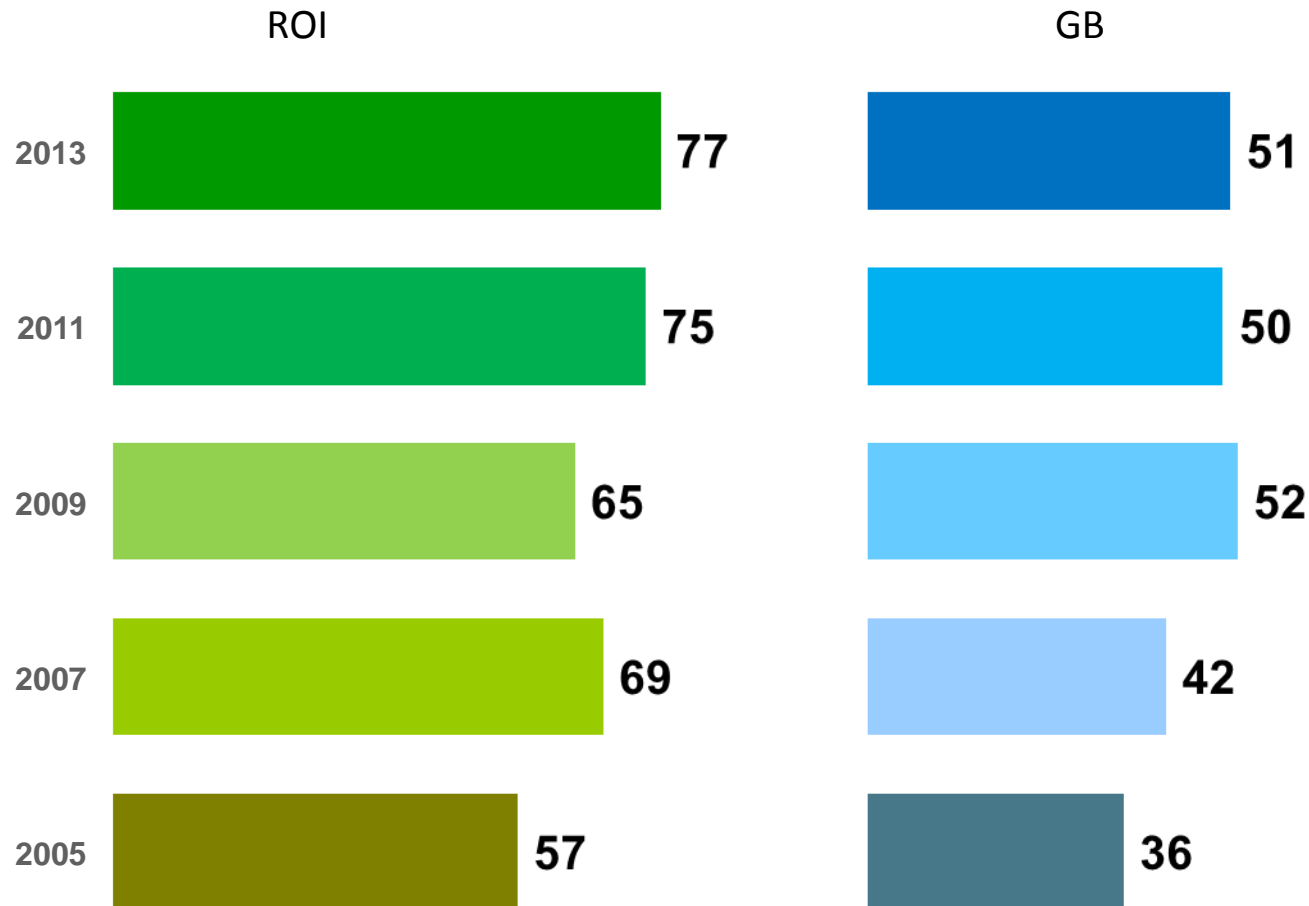
Important to know where food has come from

% agree that they like to know the area where their food has come from



Local foods offer confidence in food safety

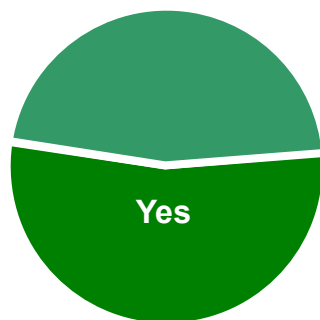
% agree that they are more confident in the safety of food produced in their local area



Organic Purchasing

EVER BOUGHT
All Adults 15+

ROI 2013



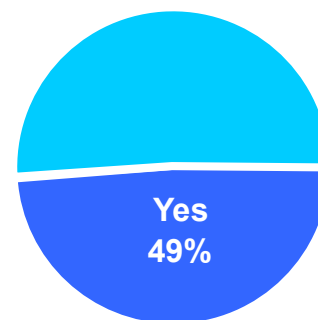
62%

EVER BOUGHT
Grocery Shoppers

**MOST FREQUENT
PURCHASES**

- Vegetables
- Fruit
- Poultry
- Dairy produce

GB 2013



54%

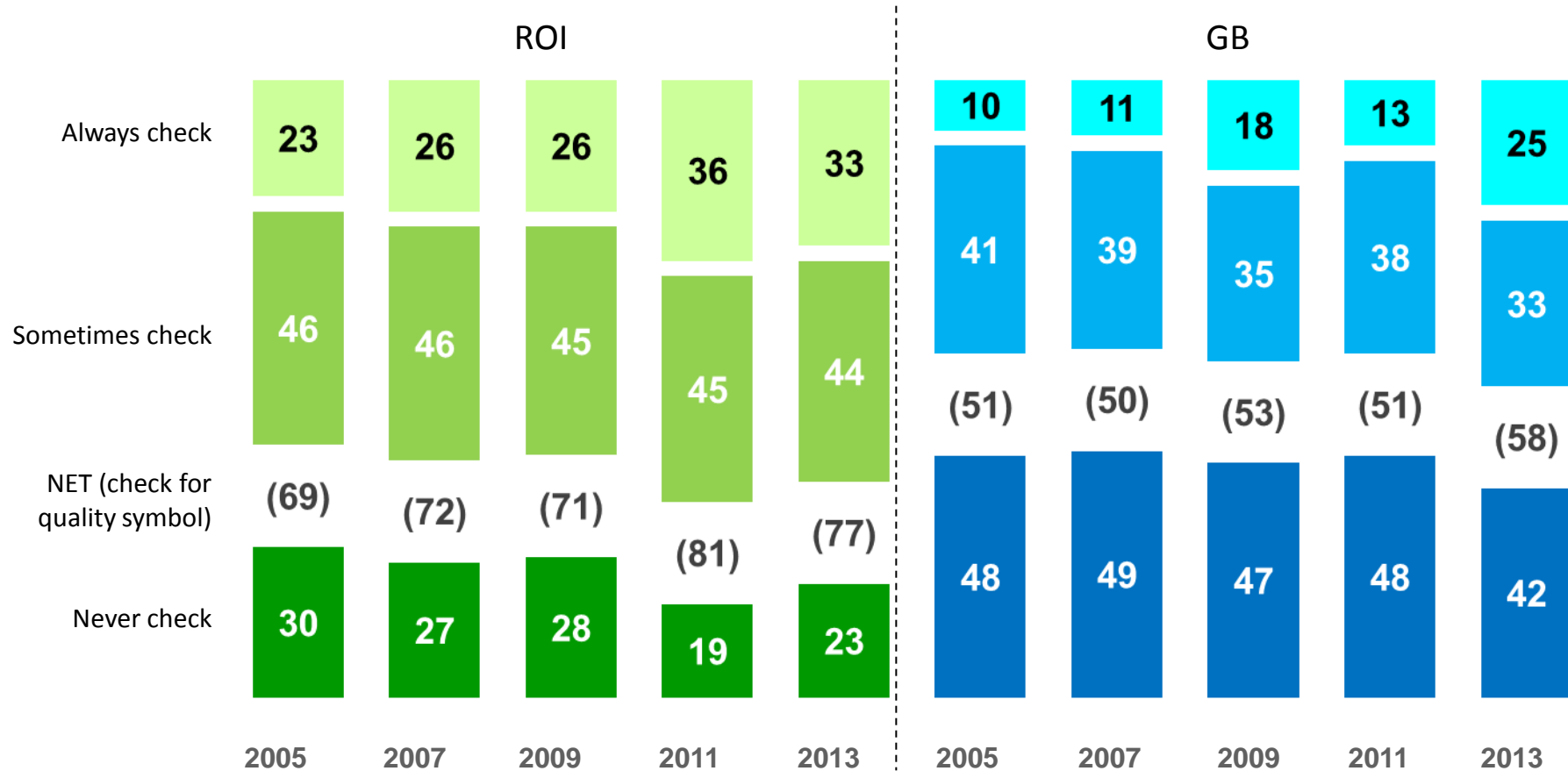
- Vegetables
- Fruit
- Dairy produce
- Poultry

Q.58 When was the last time, if ever, you bought any organic food?

Q.58a Considering the broad categories of food that I will read out to you, about how often, if at all, do you buy any in organic form?

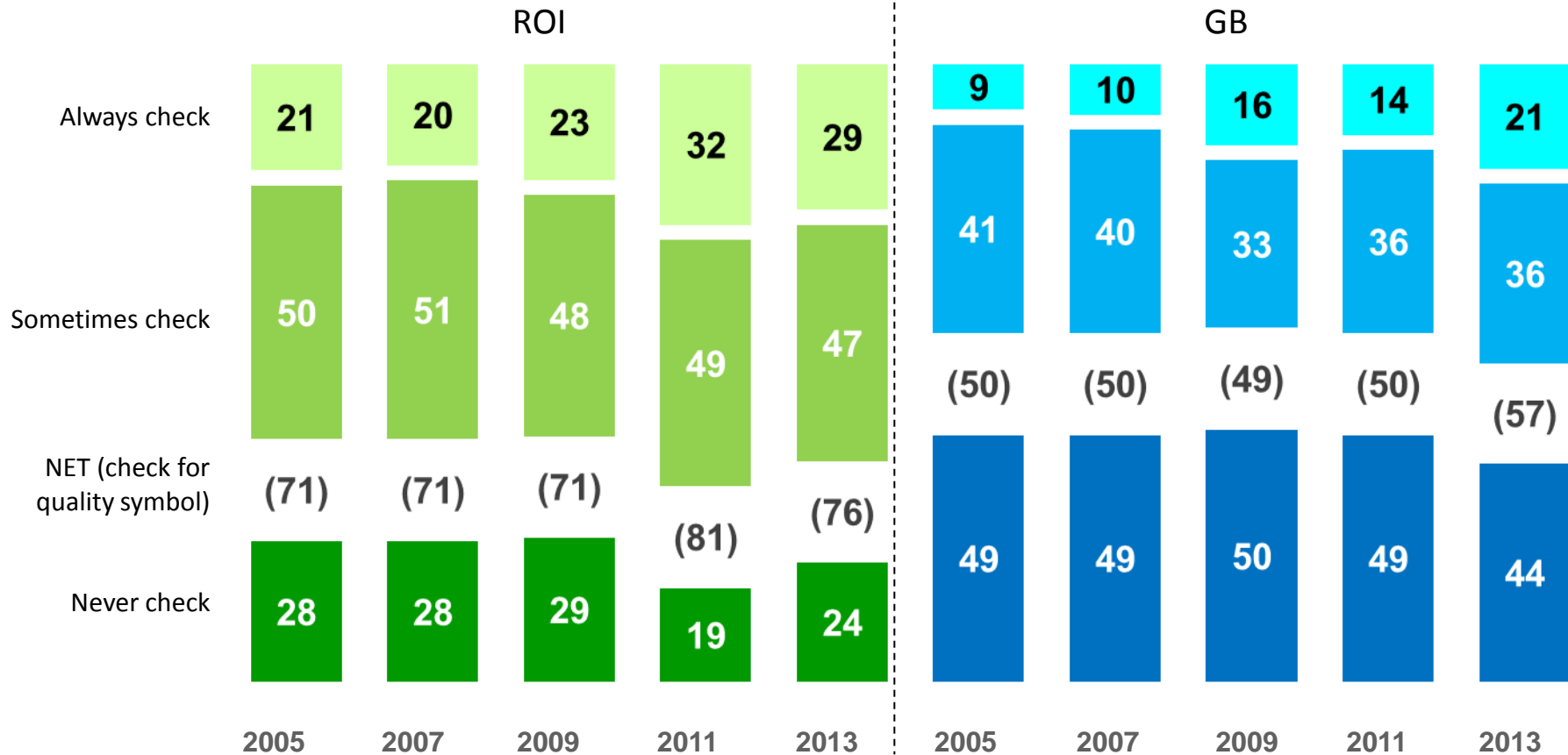
Checking for Country of Origin

Checking for Country of Origin label



Checking for Quality labels

Checking for Symbol of Quality label

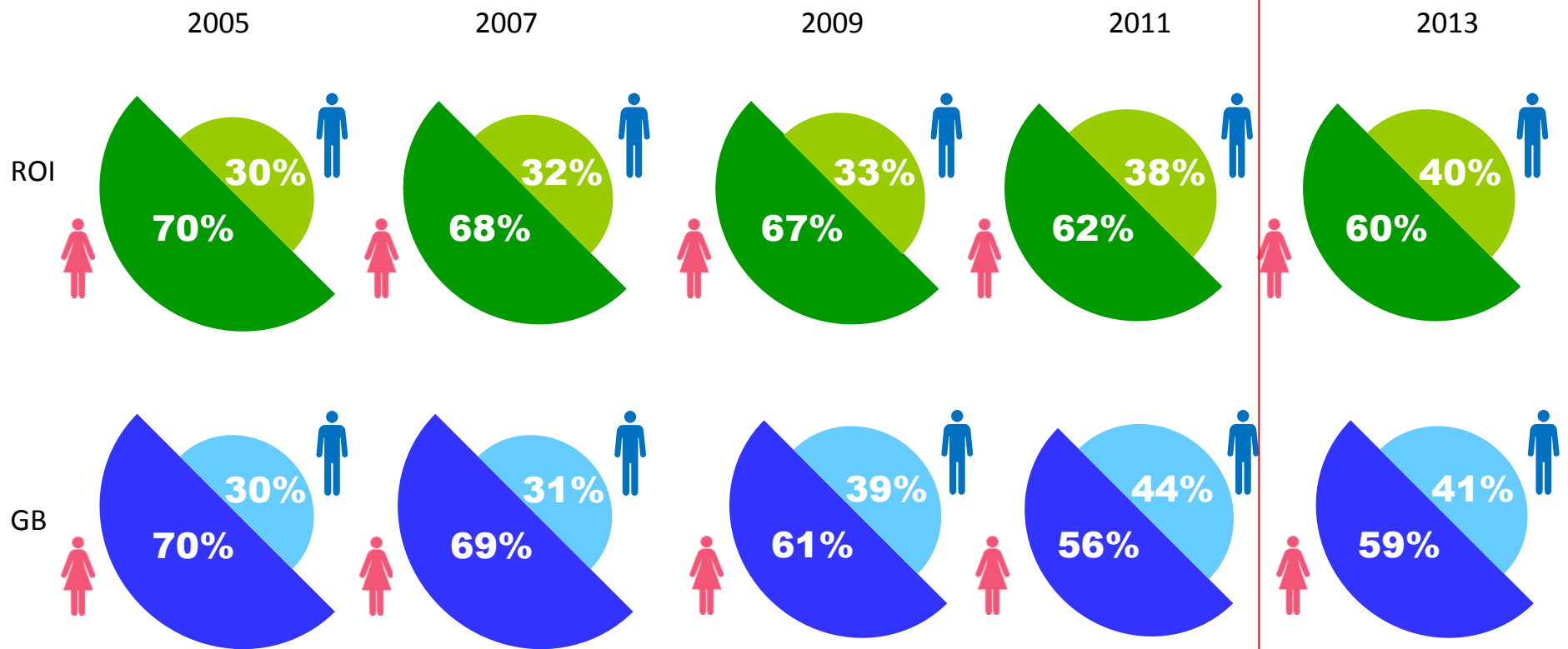


Shopping Around



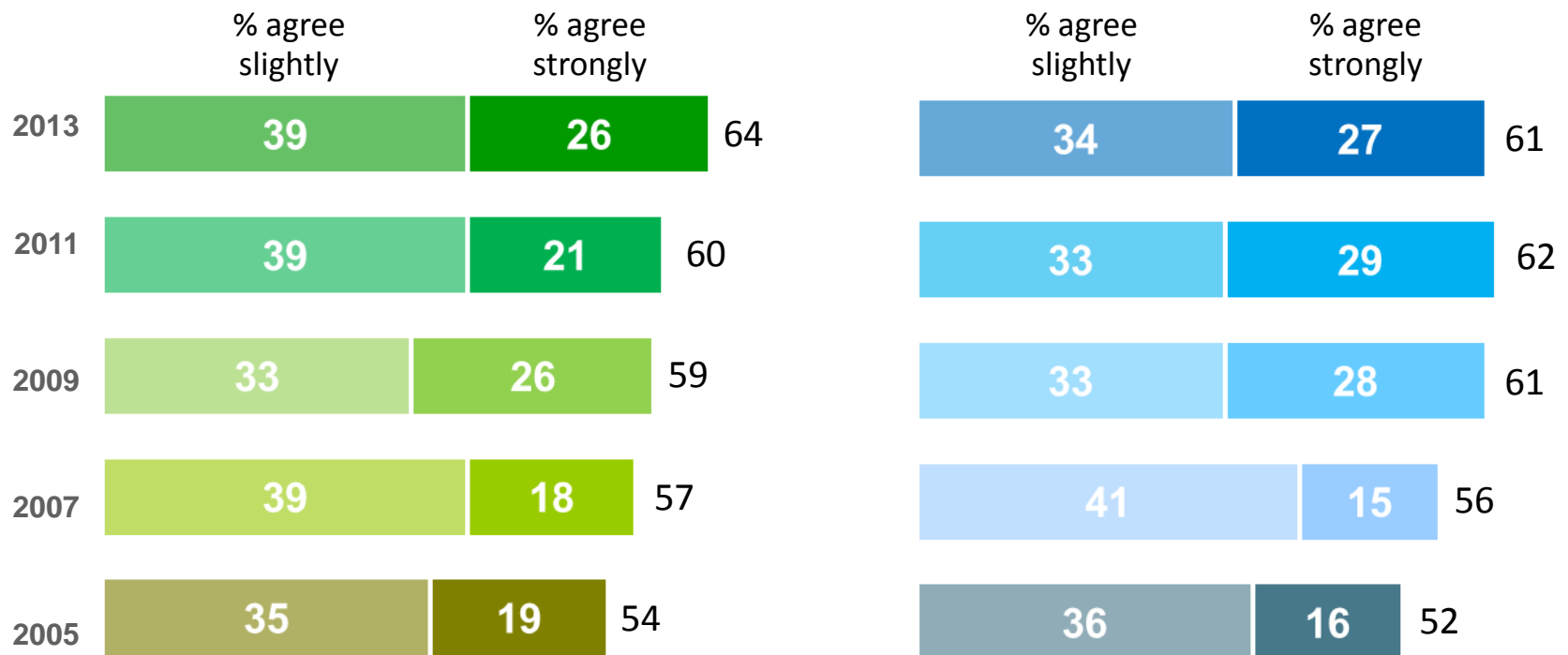
ROI and GB less gender balanced for shopping

Gender breakdown of those mainly/jointly responsible for grocery shopping



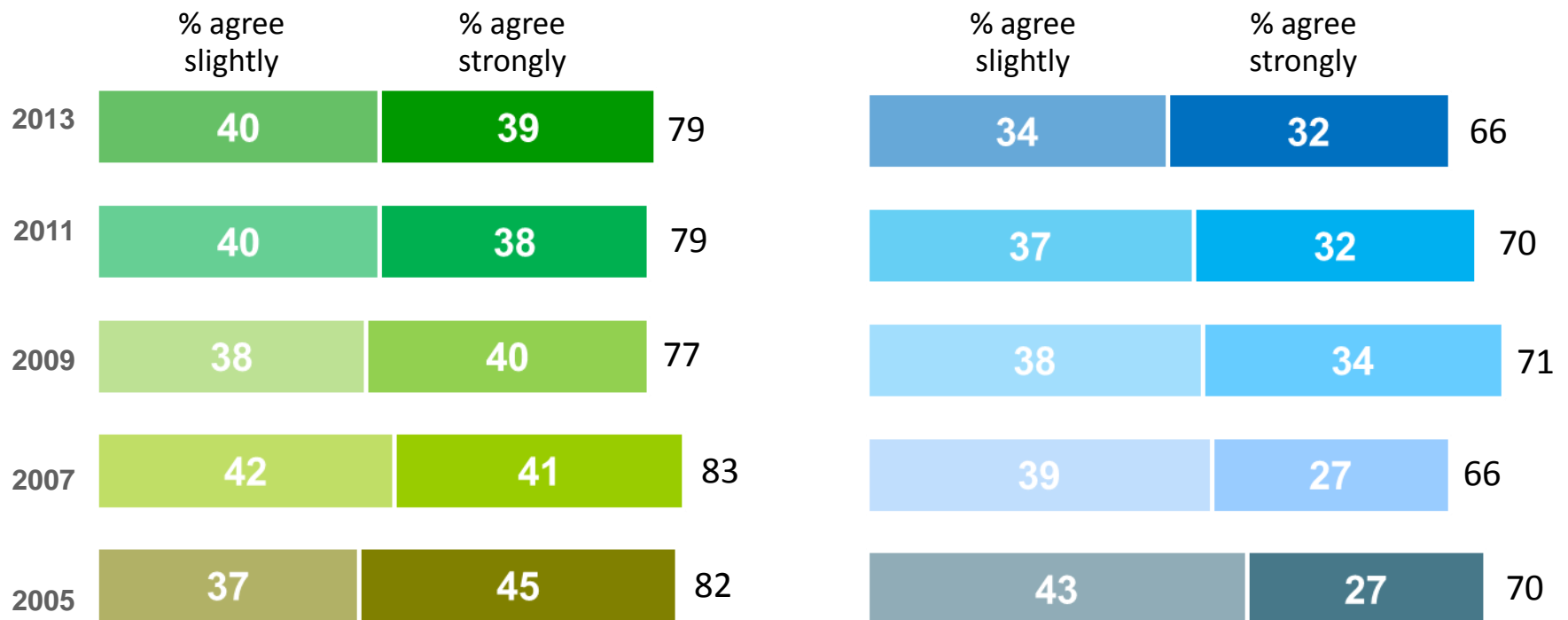
Increasingly concerned about price

When I shop the first thing I look for is price



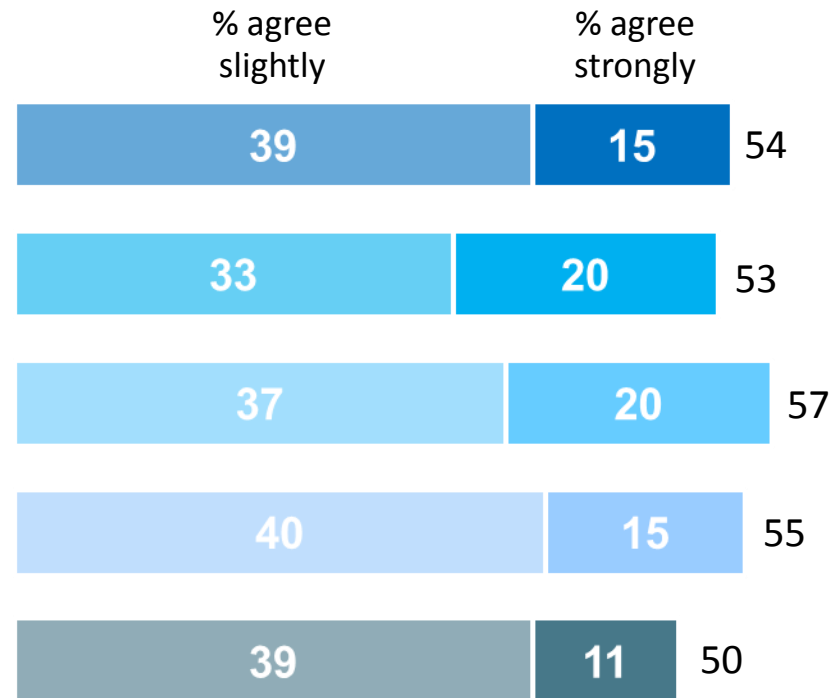
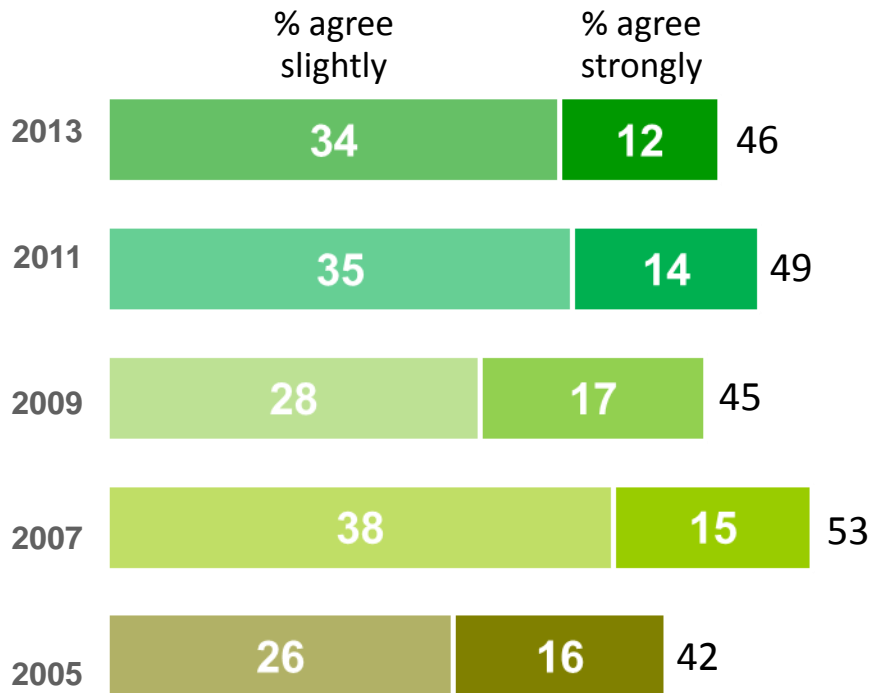
Quality over price

Quality of fresh food is more important than price



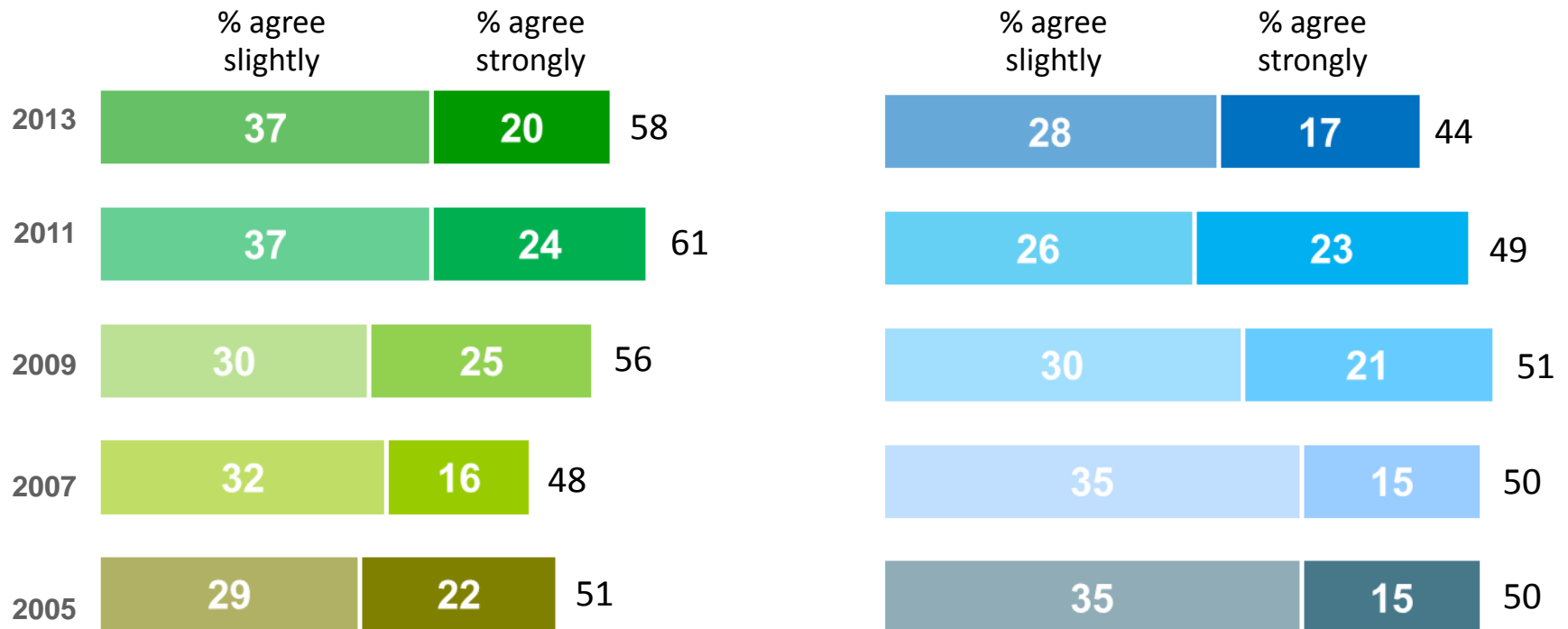
Buying on Impulse

I tend to buy on impulse if I think products are cheap



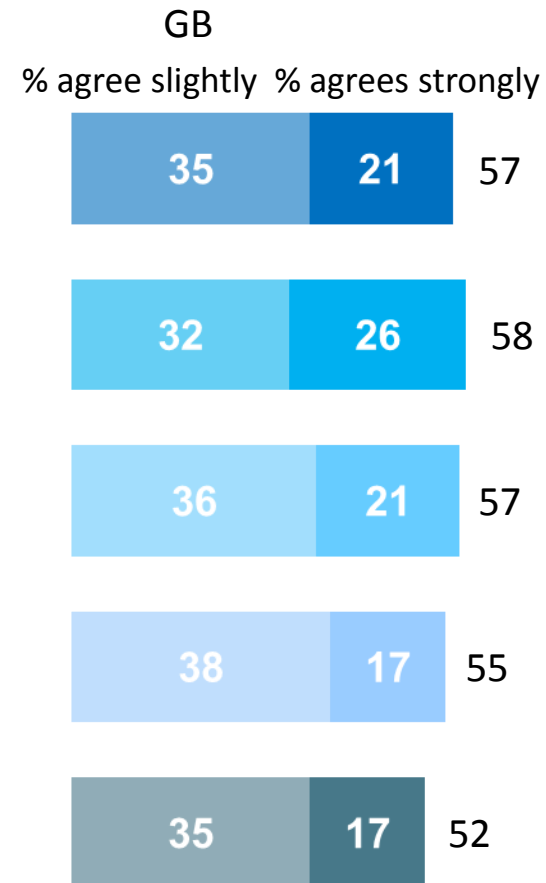
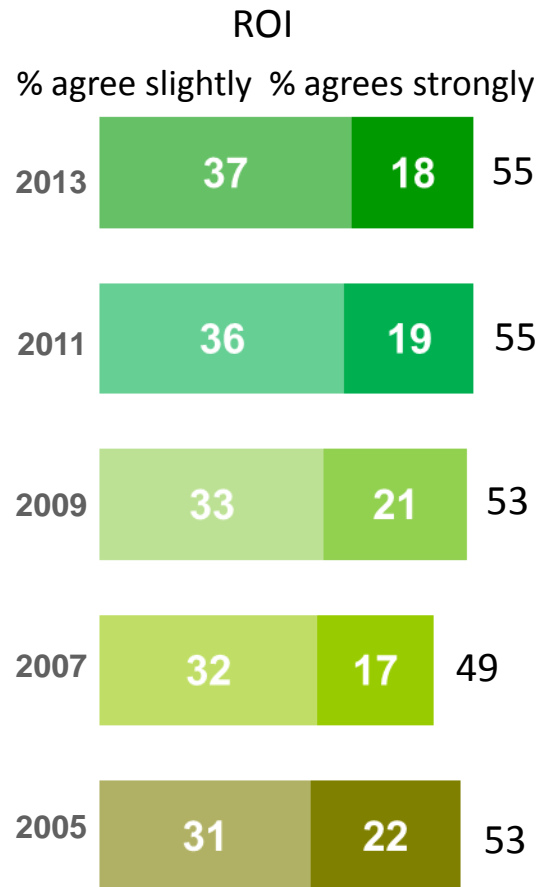
Watching for promotions

I watch for announcements for sales promotions on grocery

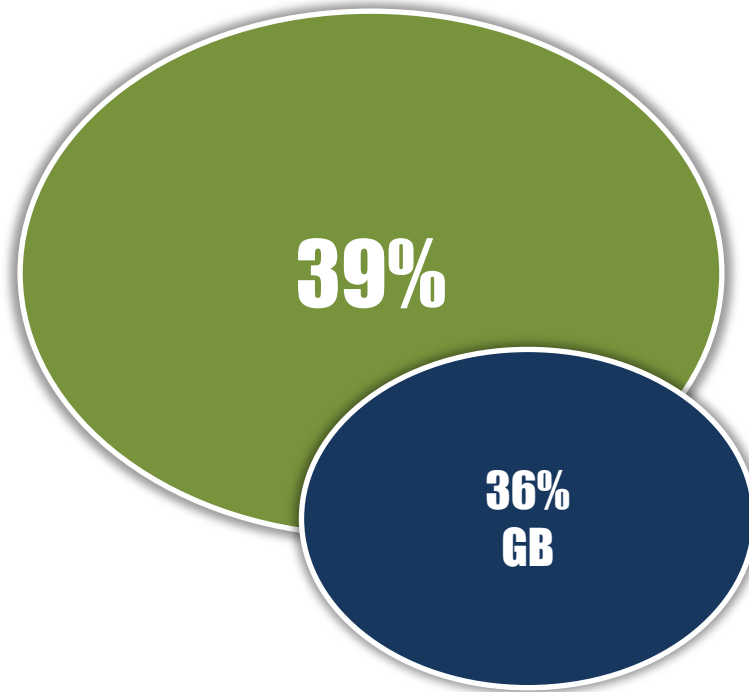


Spending time looking for bargains

I don't mind spending time looking for a bargain

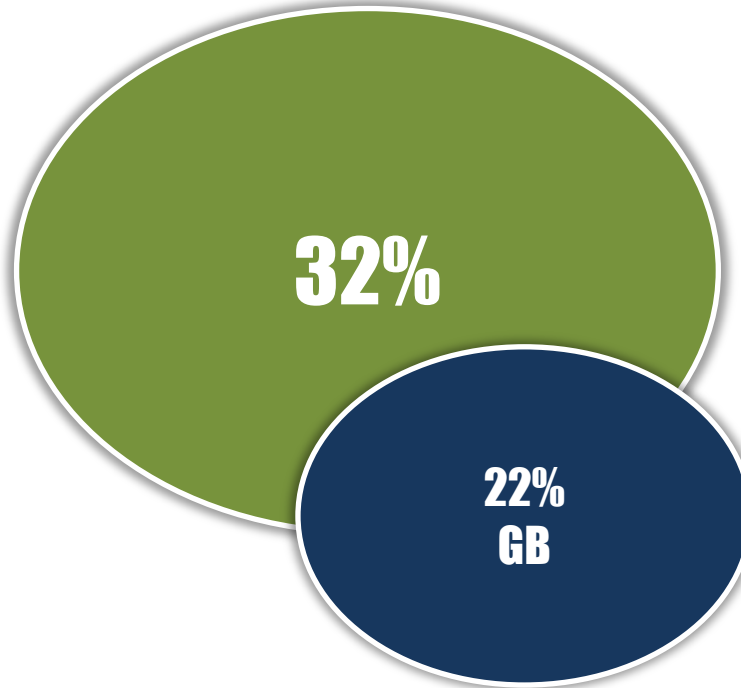


Special Offers



*‘Look up special offers on the grocery store website’
compared to 28% of Baby Boomers*

Offline Research



*‘Browse through inserts/grocery store magazines’
compared to 34% of Baby Boomers*

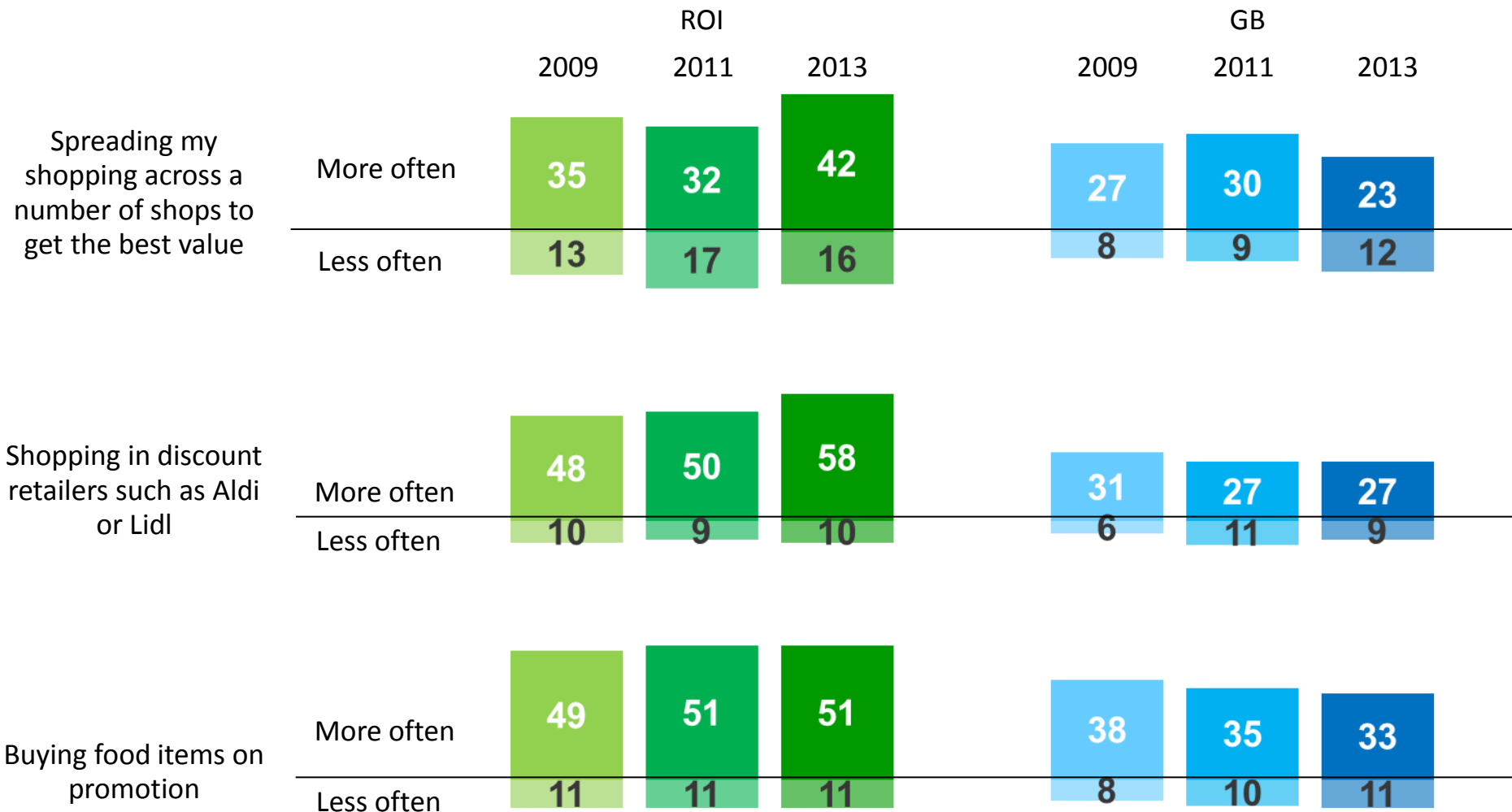
“

AlB have this new thing on their app where it breaks down your expenditure. If I go out for dinner and lunches and stuff... it tells you how much you've spent on food alone

22-25 year old

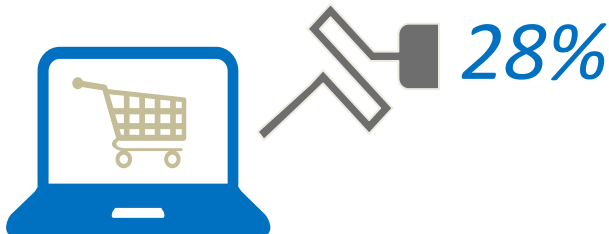
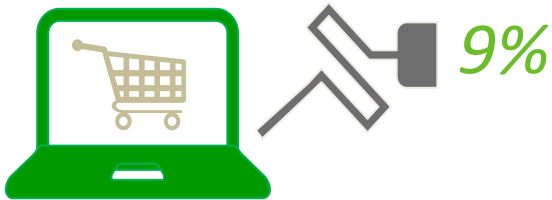
”

Shopping behaviour is changing



Online grocery shopping

% ever ordered their grocery shopping online



How often are they ordering their grocery shopping online?



- Daily/few times a week
- Once a week
- 2-3 times a month
- Once a month
- Less often

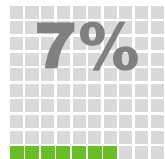


- Daily/few times a week
- Once a week
- 2-3 times a month
- Once a month
- Less often

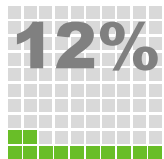
Ever downloaded a recipe



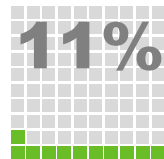
Most recent download activity



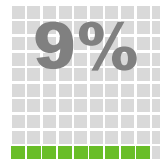
Past
Week



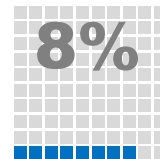
Past
Month



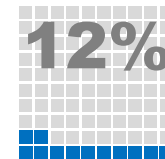
Past 6
Months



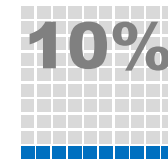
Longer
Ago



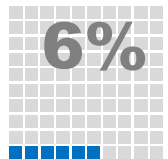
Past
Week



Past
Month



Past 6
Months

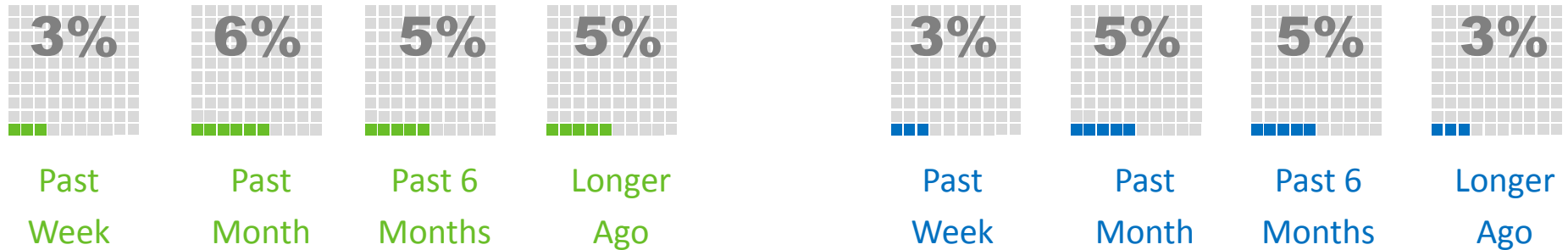


Longer
Ago

Ever downloaded an app



Most recent download activity



Technology

is creating a tipping point in consumer behaviour

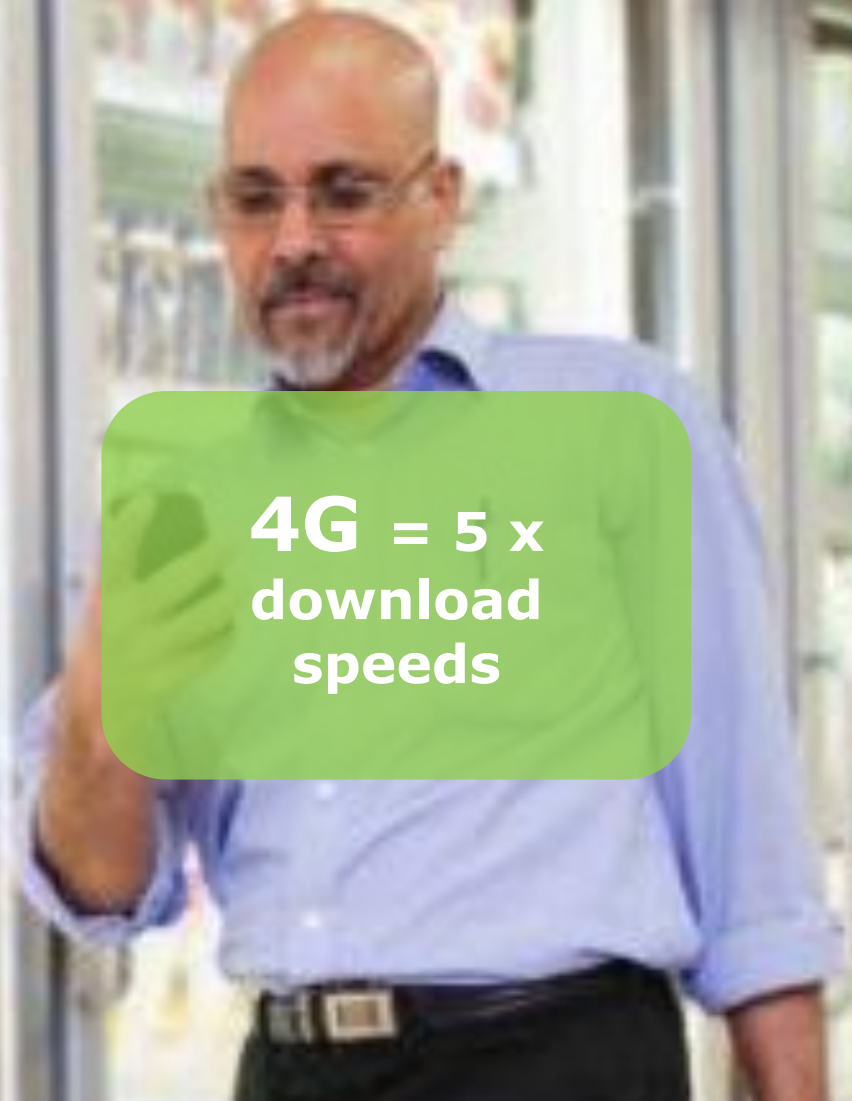


By 2015, 3 in 4 will own a smartphone



By 2015, 1 in 4 will own a tablet

4G = 5 x
download
speeds





Technology: allowing brands to have “fun” and connect or share with people

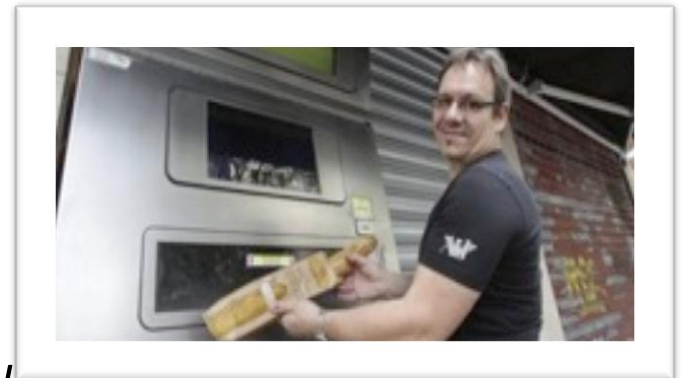


Technology : challenging the traditional bricks and mortar

Pop up shops/vans



24 hour convenience..



Tesco Gatwick



Tesco launches virtual 3D fitting room

by Ed Owen, 29.02.2012



Technology:
Apps, maps, etc, qr
codes all allowing
people to manage “the
purchase risk”

HEALTH & WELLBEING

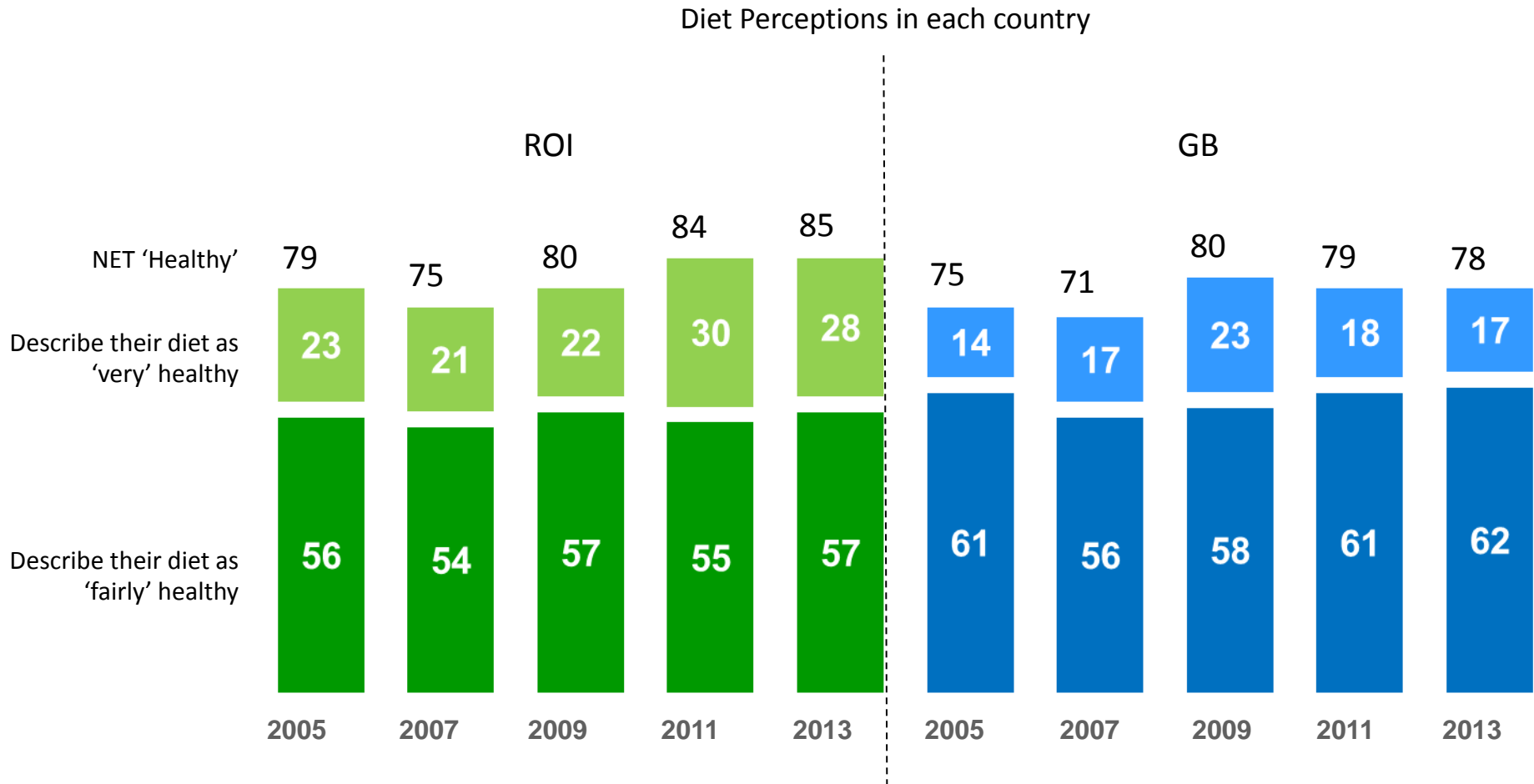


Quest for health and wellness

"I want a balanced approach to health and wellness, to have greater control through the choices I make"



Perception of health



Eating healthier

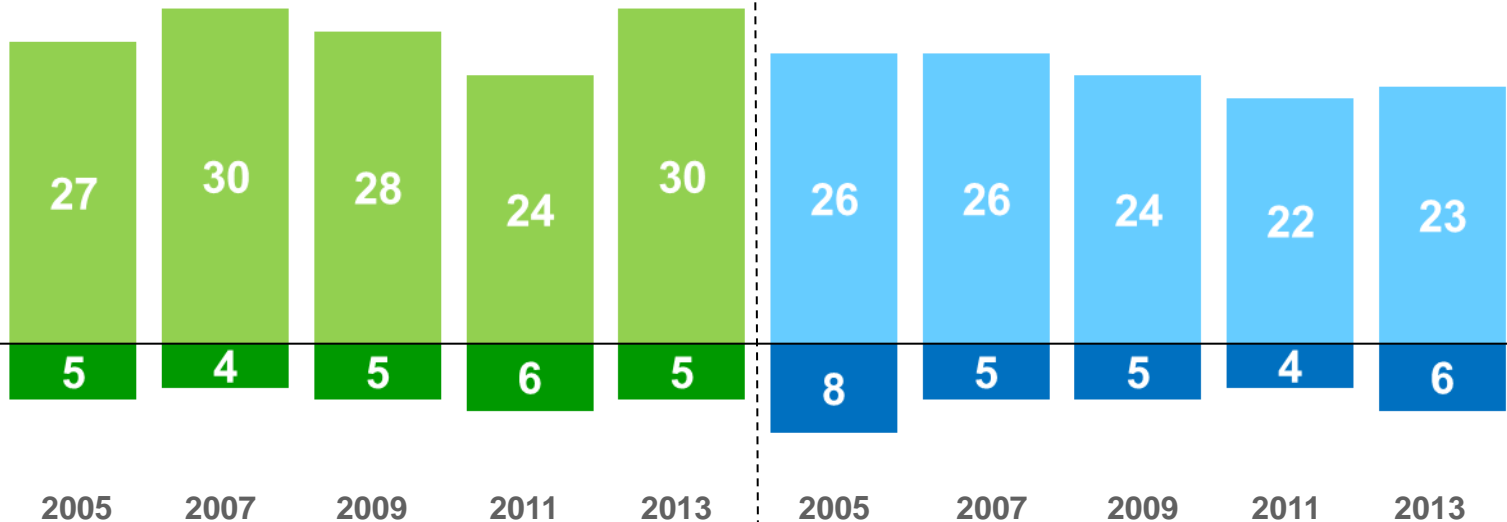
Changes in eating habits in last 12 months

ROI

GB

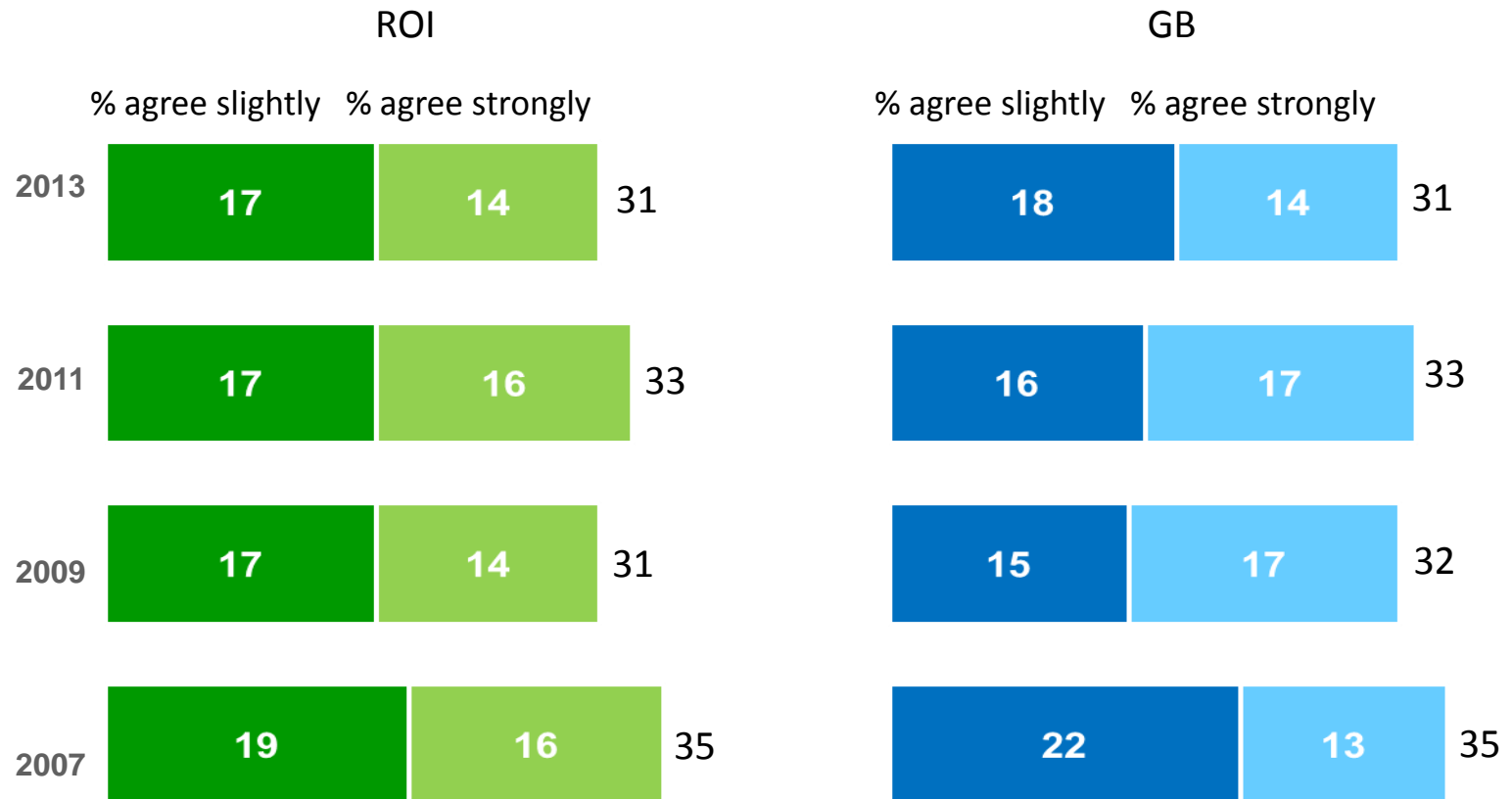
My eating habits
are more healthy

My eating habits
are less healthy



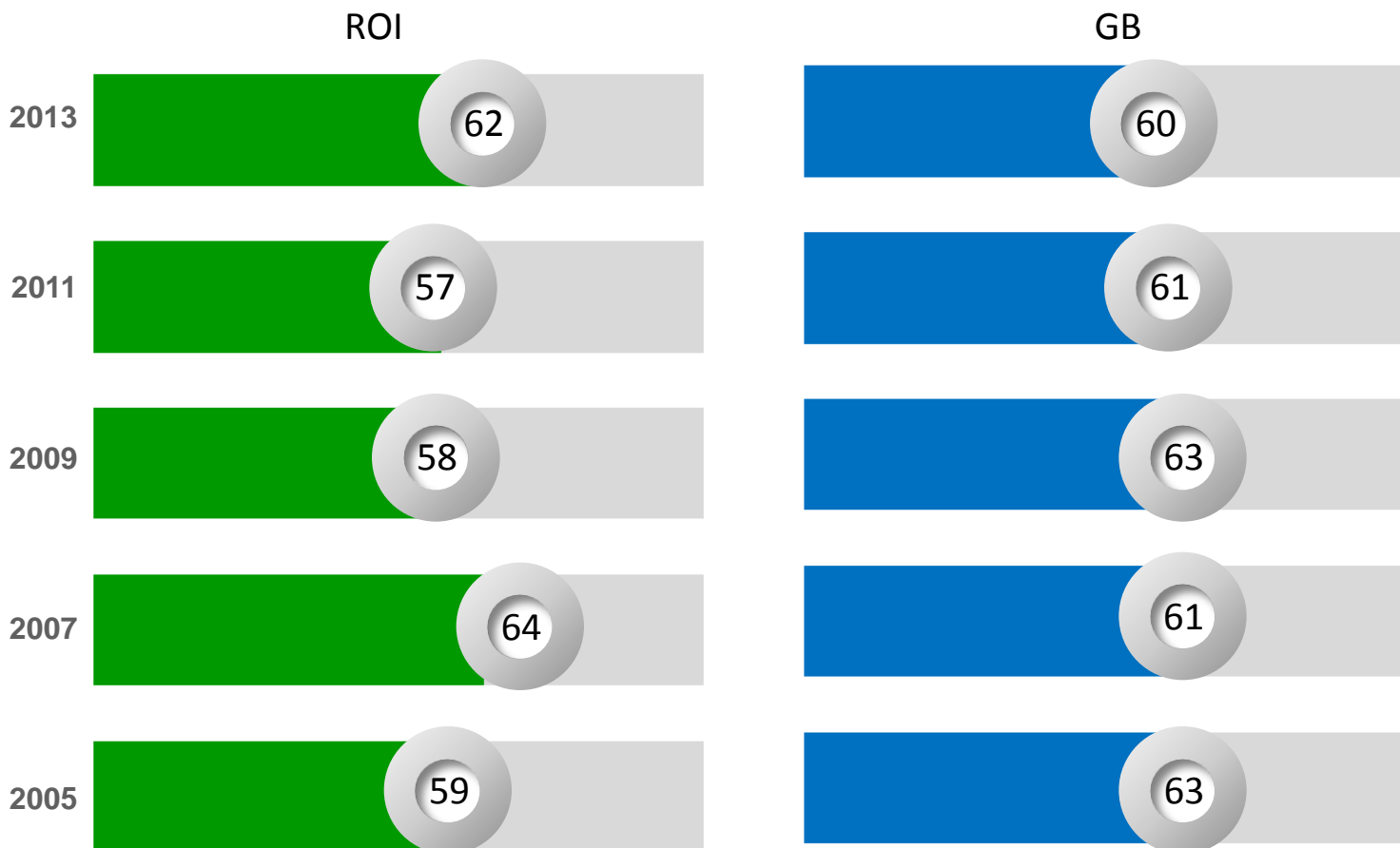
Concerns about childhood obesity

I am concerned about my children becoming obese

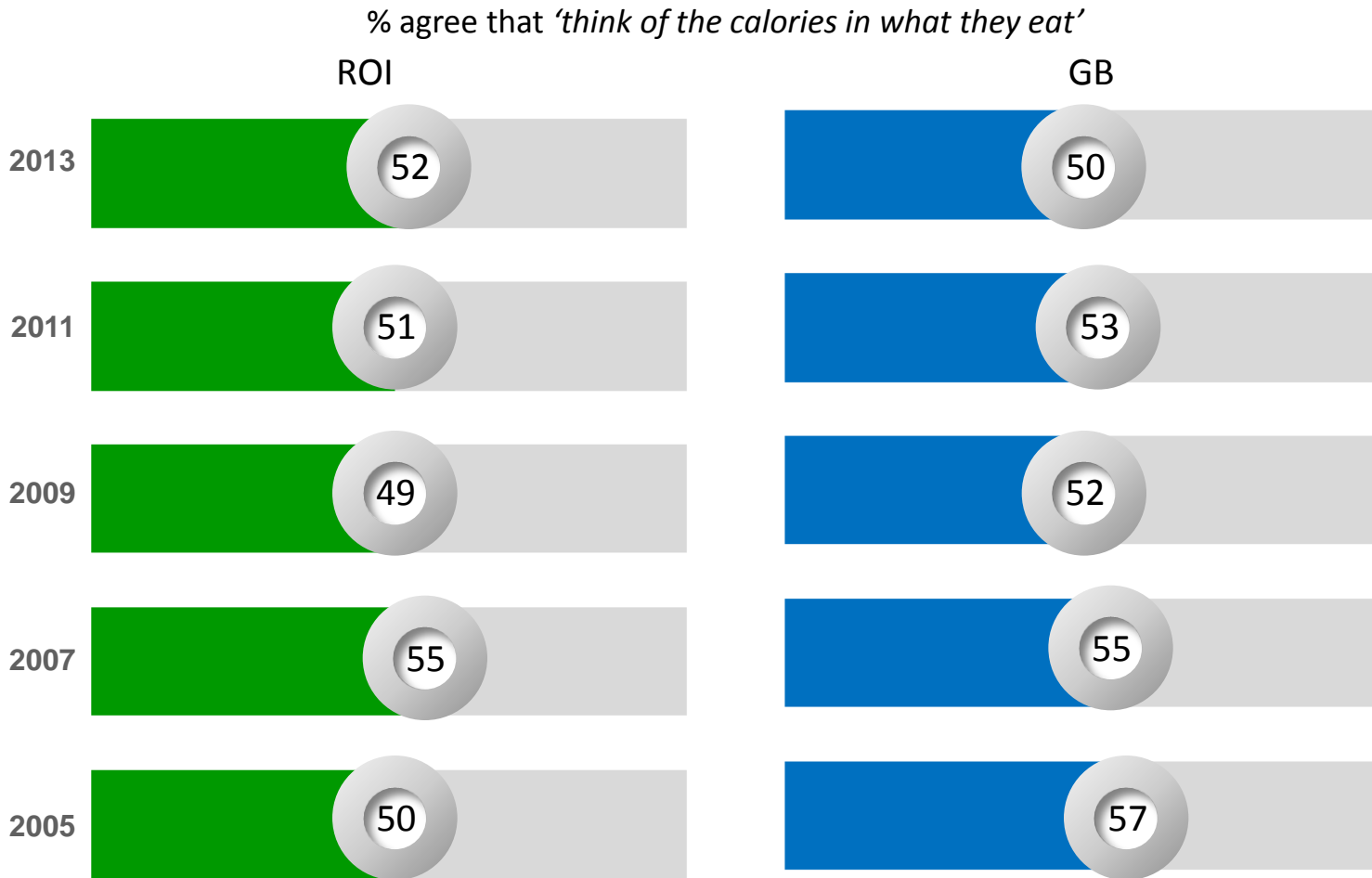


Low fat options

% agree that *'always look for low fat options when buying food products'*

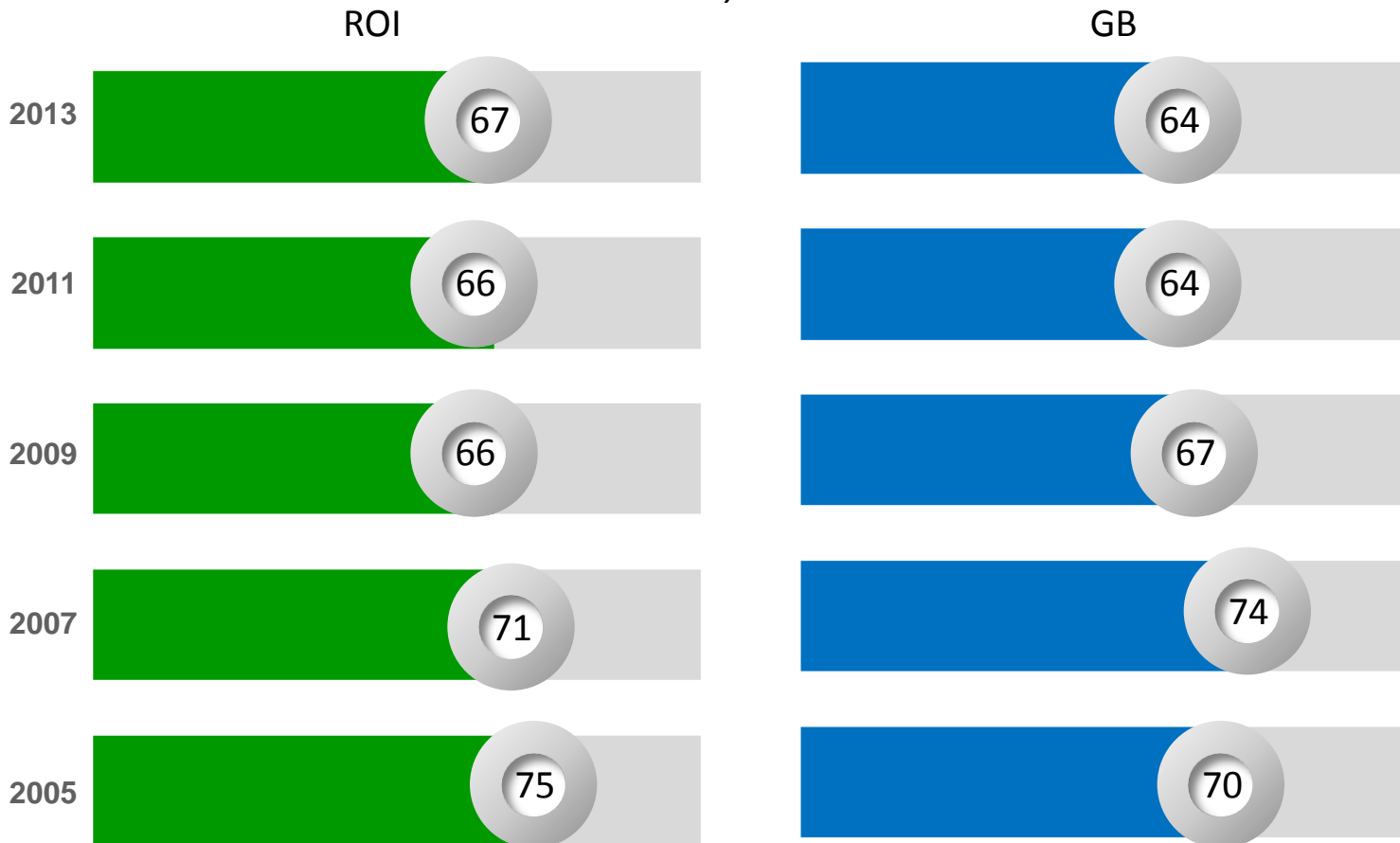


Checking calories



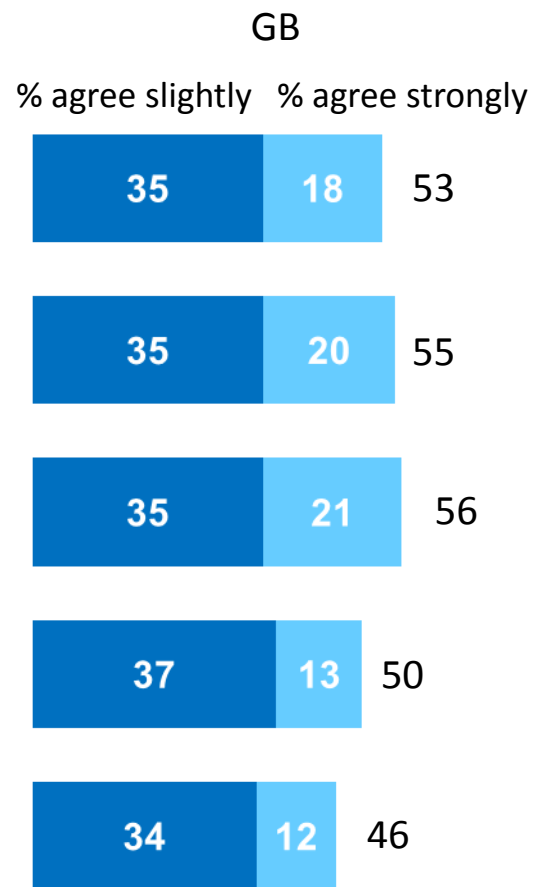
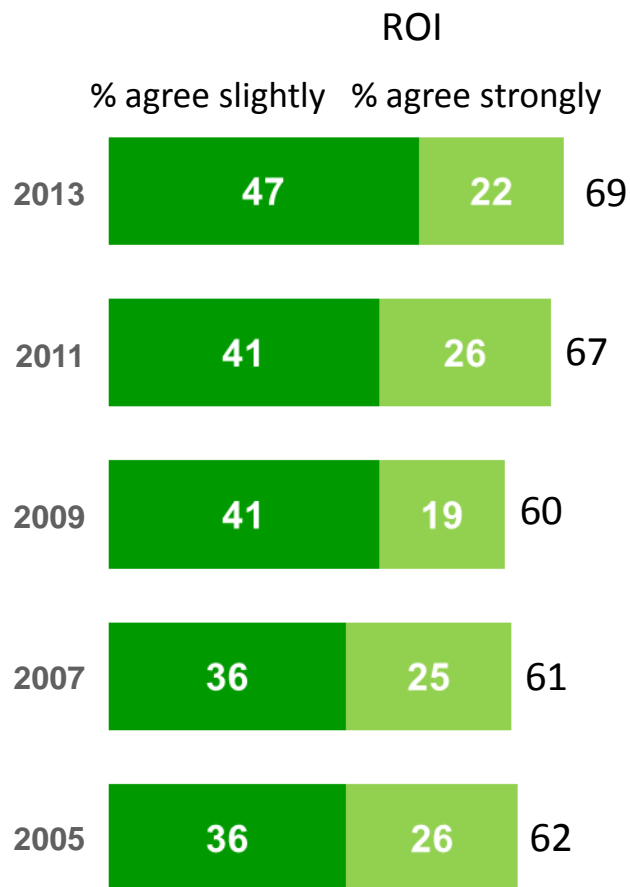
Low fat = healthy?

% agree that *'if a label says 'low fat/reduced fat' then the product will always be the healthy choice'*



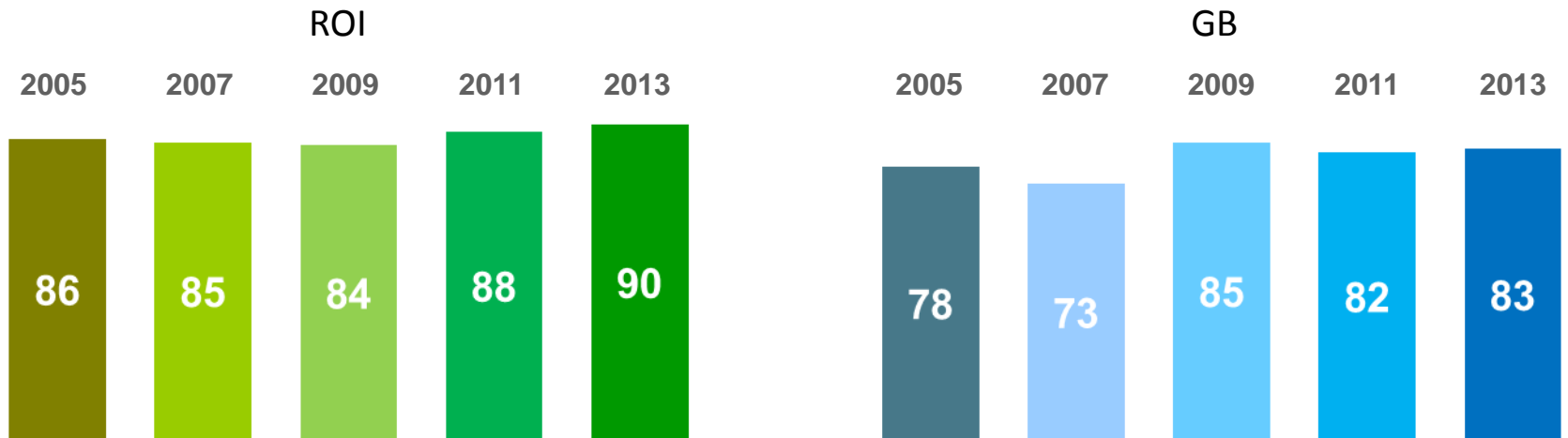
Being healthy

I eat healthy to take control of my life



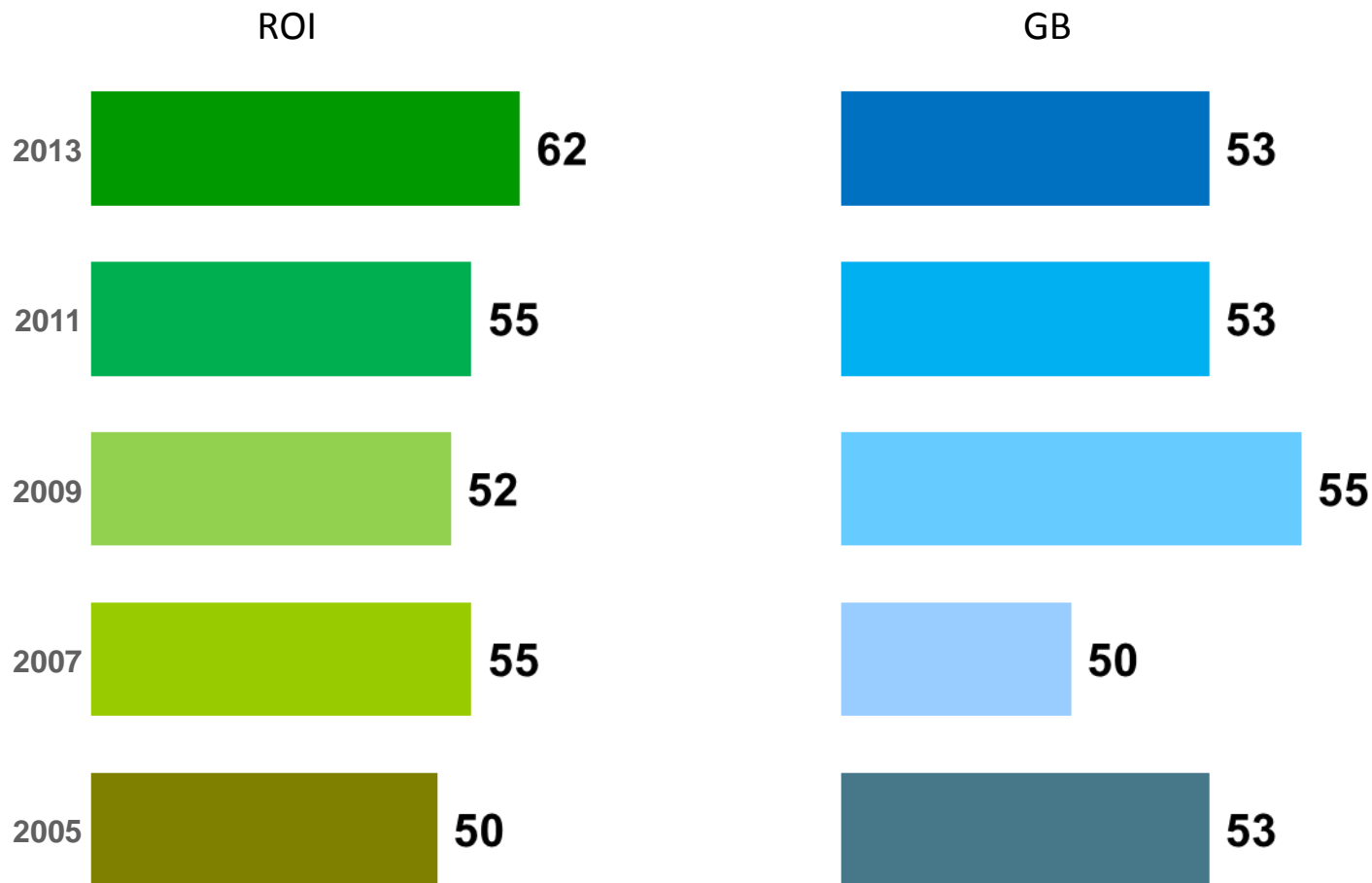
Healthy diet, healthy mind

% Agree - A good diet can help mental health



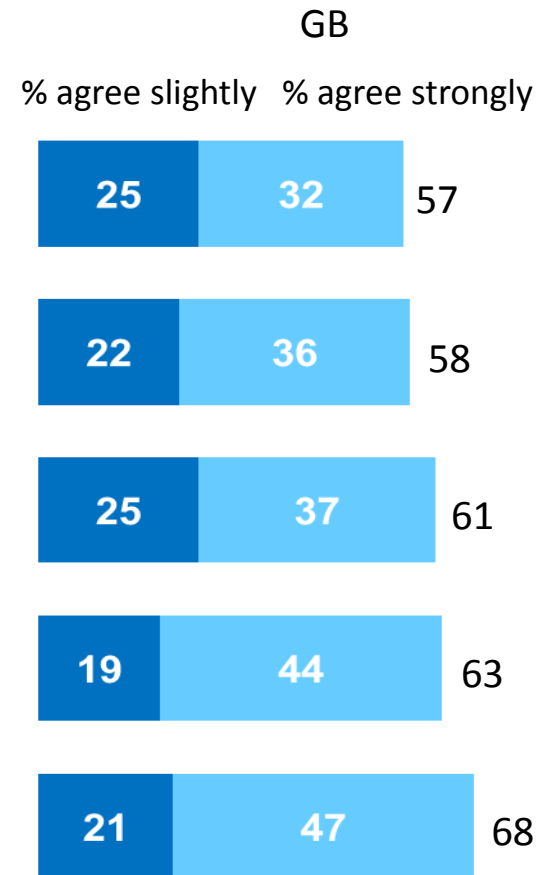
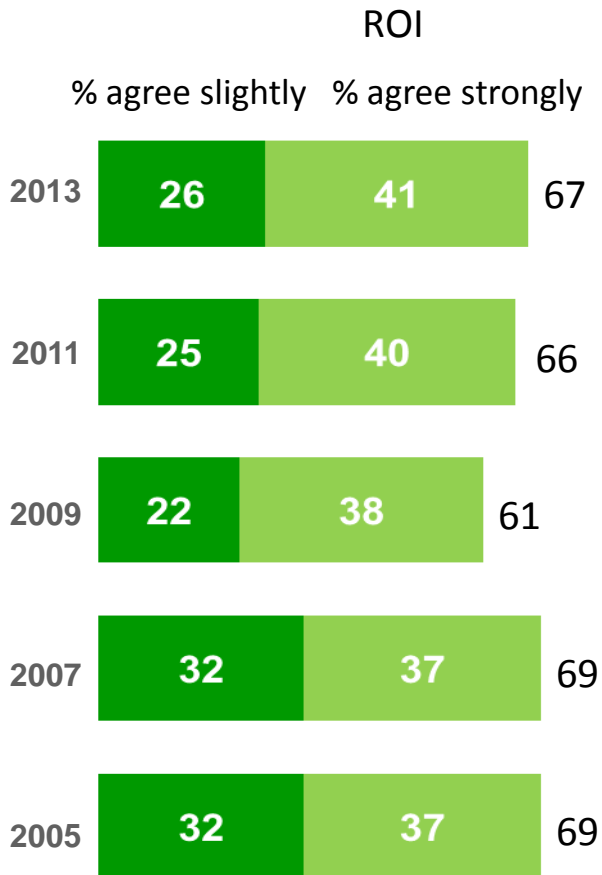
Checking nutritional labelling

% applies that they 'always check the nutritional labelling on food before buying them'



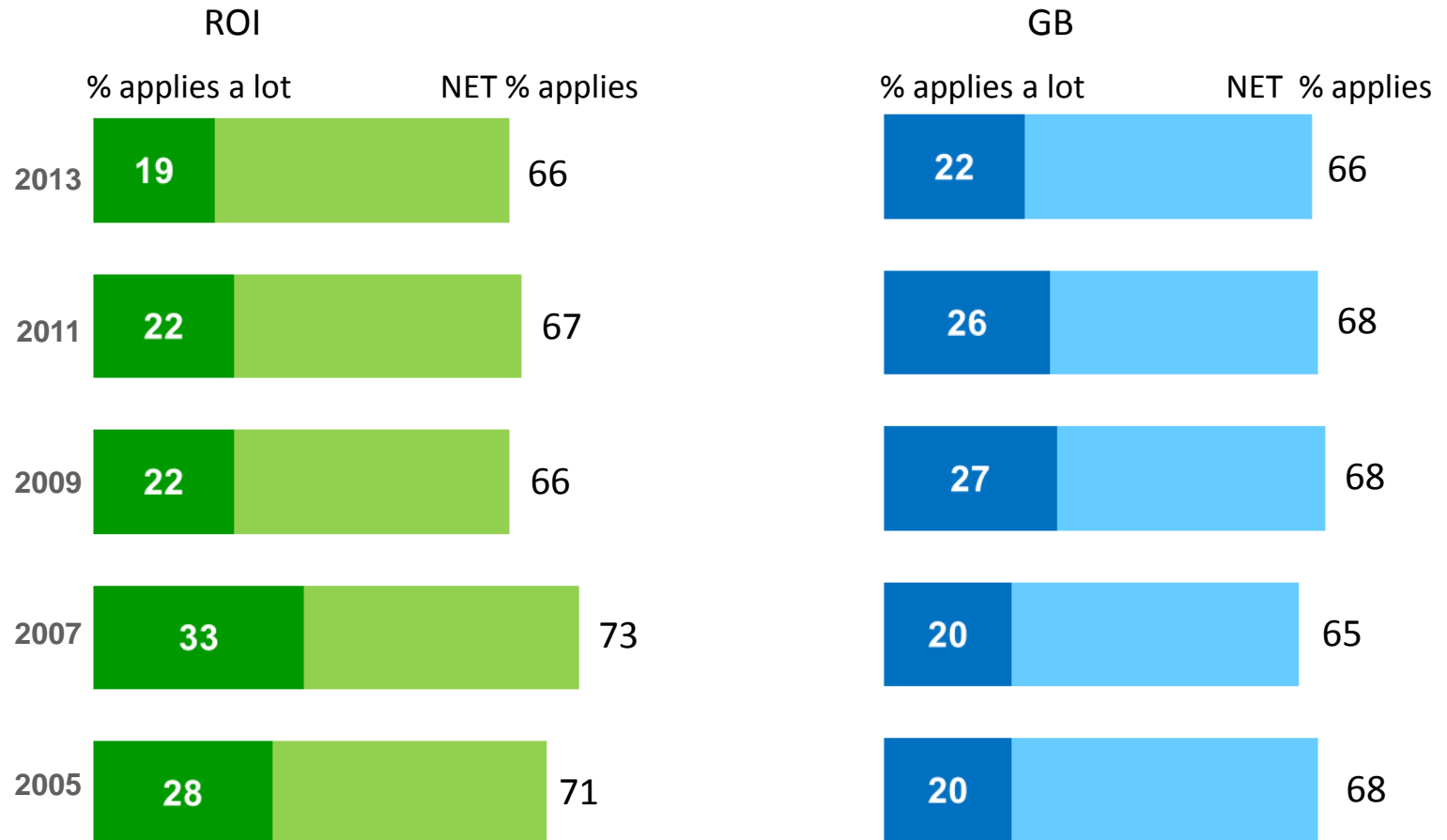
Would like manufacturers to help

I would like manufacturers to help me to eat healthy

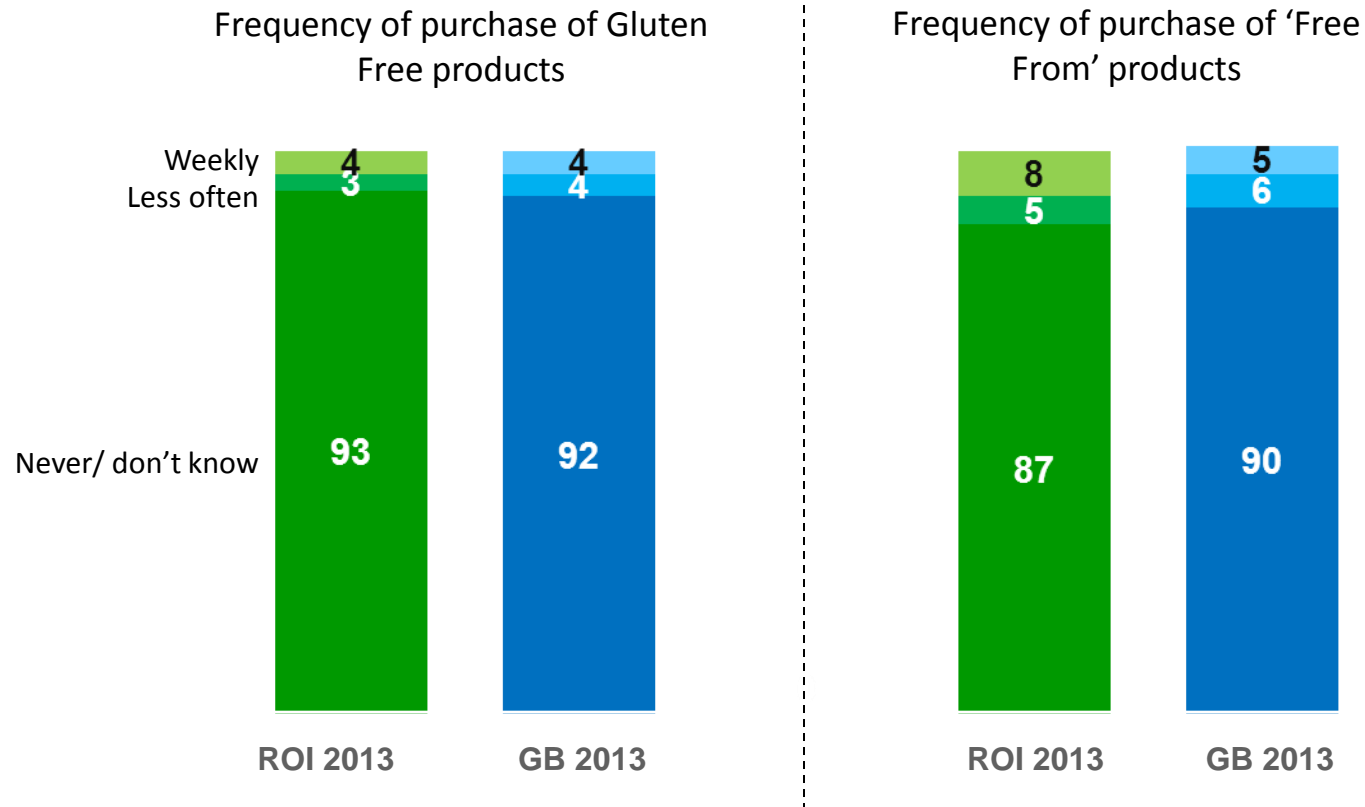


Willing to pay more for healthy foods

I am willing to pay more for healthy foods & beverages (as long as they taste good)



Low Gluten Free purchases



Millennials & health

'Sometimes I choose the healthy option, but only if it's convenient and easy'

	GenX	BB
ROI	44%	45%

51% ROI

51% GB

'The foods I choose are closely linked to my fitness regime'

	GenX	BB
ROI	39%	29%

41% ROI

37% GB

Currently on a diet

	GenX	BB
ROI	26%	17%

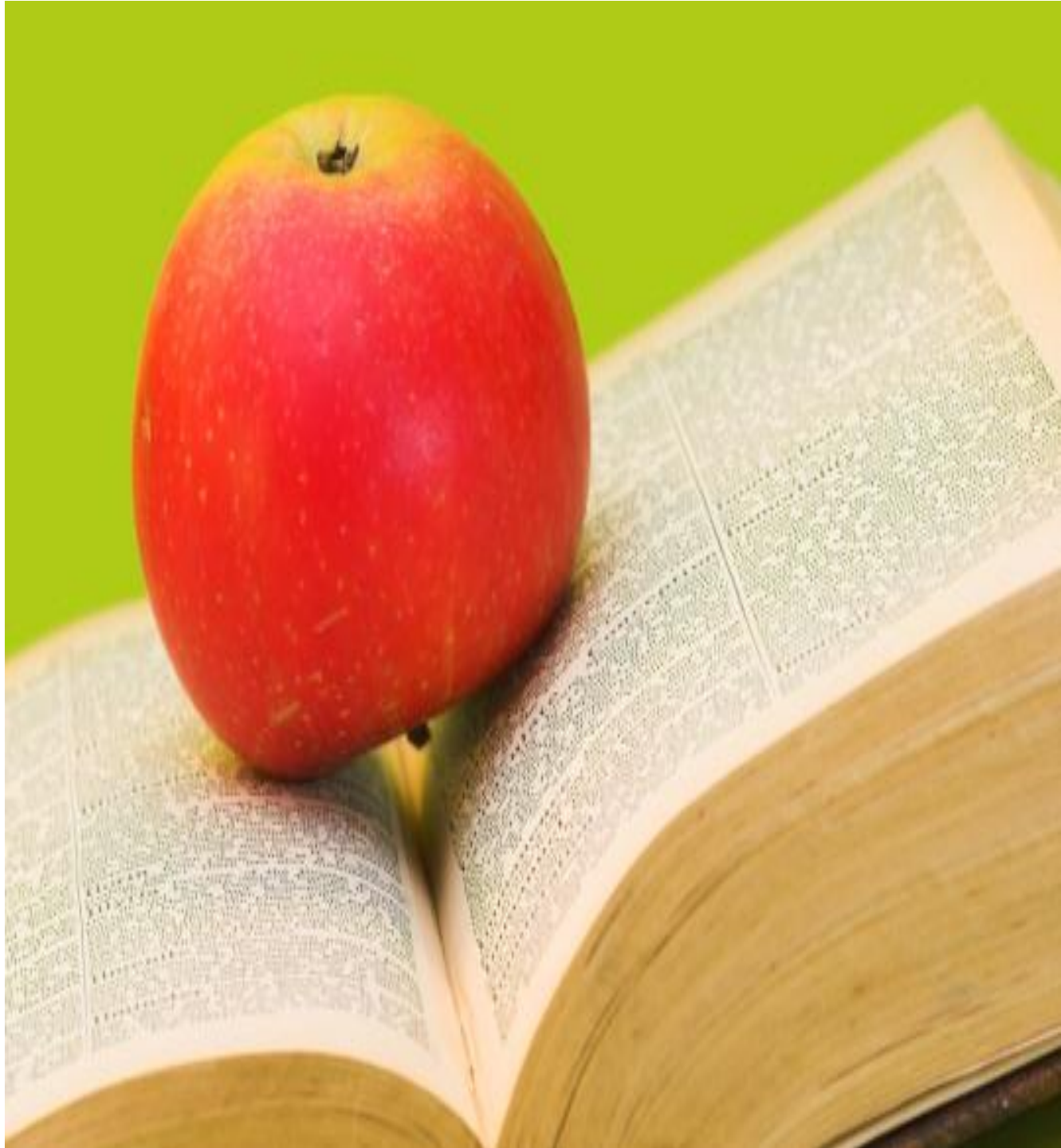
33% ROI

36% GB

Top 5

High Protein	11%
Vegetarian	9%
Gluten free	8%
Juicing	7%
Dairy free	7%

FOOD FOR THOUGHT



Food for thought.



END!
Thank You.