What Ireland Ate Last Night

Report 2020

BORD BIA
Thinking House

Who we talked to?

Sample Composition

/   Research into Ireland's evening meals was conducted in n=2 phases…

1.   **RECRUITMENT SURVEY** *(9th – 14th October 2019)*
   ➢   Online survey to n=1,013 nationally representative adults in the Rep. of Ireland
   ➢   Sample profile was matched back to that conducted in 2011 to ensure no sample bias appears when comparing behaviours and trends over time based on age, sex, social grade and region
   ➢   Survey also captured other aspects including key attitudes, behaviours, drivers, grocery shopping behaviour all around the evening meal occasion

2.   **7 DAY DIARY SURVEY** *(17th – 23rd October 2019)*
   ➢   From the n=1,013 respondents in the recruitment survey we sent out a daily diary survey each day for 7 consecutive days
   ➢   The survey contains a detailed review of all key aspects and dynamics around the evening meal for the household for that day (both at home or out of home)
   ➢   We achieved a significant and robust daily sample size *(Monday = 829; Tuesday = 814; Wednesday = 958; Thursday = 906; Friday = 879; Saturday = 872; Sunday = 855)*
   ➢   Combining the meals across each day of the week led to a total sample of adult meals across the week of **n=5,925** and a total sample of kids meals of **n=1,841**

➢   **Comparisons with the 2011 study are made where relevant to assess the trends over time**

Structure of Report

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The last 8 years at a glance!

A lot has changed in Ireland since 2011

Unemployment Rate in Rep. of Ireland

15.7%

4.8%

Oct '11   Oct '19
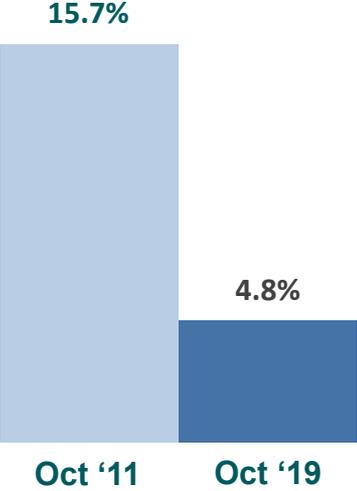
Grocery Retailer Market Share

2011   2019

TESCO
2019: 21%
2011: 28%

DUNNES STORES
2019: 22%
2011: 24%

SuperValu
Real Food, Real People
2019: 21%
2011: 20%

LIDL
2019: 12%
2011: 6%

ALDI
2019: 13%
2011: 5%

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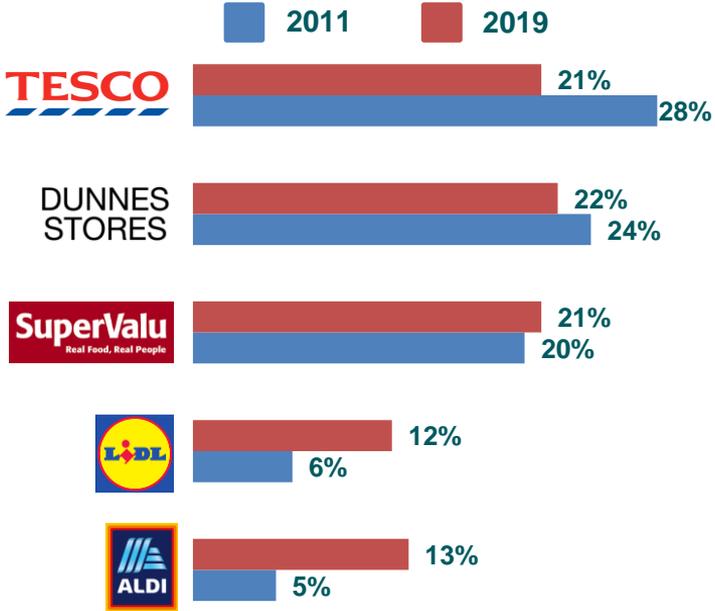
And across the World for that matter!...

THE OCEANS ARE RISING AND SO ARE WE

reduce reuse recycle

How can you eat sustainably?

EAT LESS MEAT

BUY LOCAL

GROW YOUR OWN

DRINK TAP WATER

Heineken

VEGAN
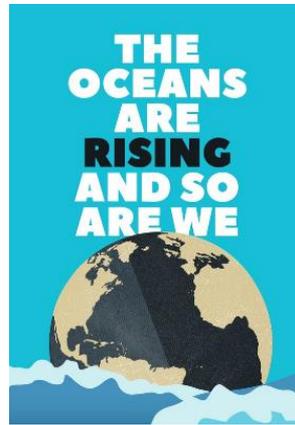
… so how has our Evening Meals changed over time?

Attitudes to Cooking and how things have changed
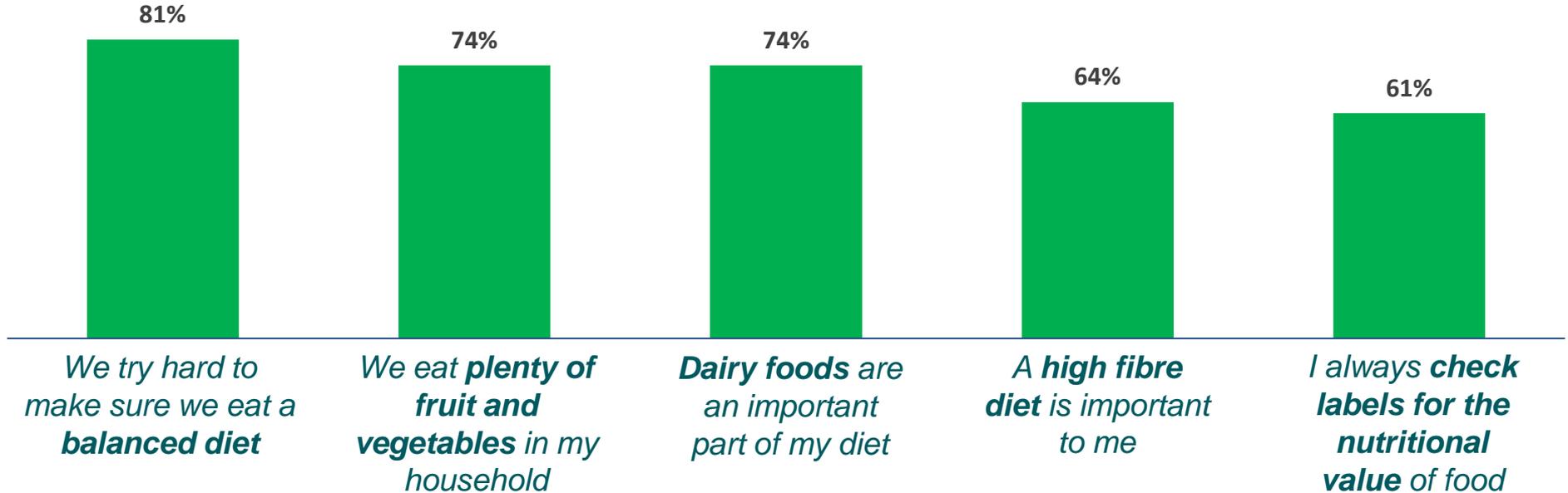
And many of us claim to be trying to change our diets in conjunction with trends and what we hear in the media.

40%
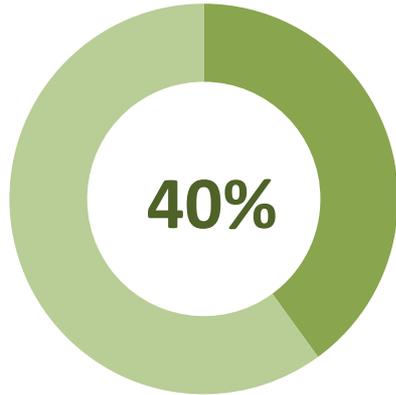
*Think they should **reduce the amount of meat their household eats** based on what they **hear in the media***

19%

*Would consider **going vegan in the future***

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MEAT & DAIRY FACTS

Influence of Bord Bia Consumer Lifestyle trends is evident in our Evening Meal consumption.

% A GREAT DEAL OF INFLUENCE ON EVENING MEALS
(Base: All Adults Aged 18+; n=1,013)

HEALTH & WELLBEING

42%
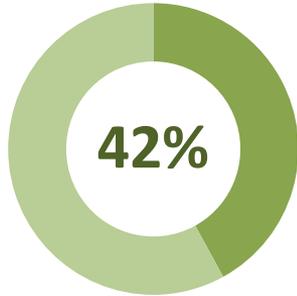
I am more aware of the food that I eat and the impact it can have on my physical and mental wellbeing
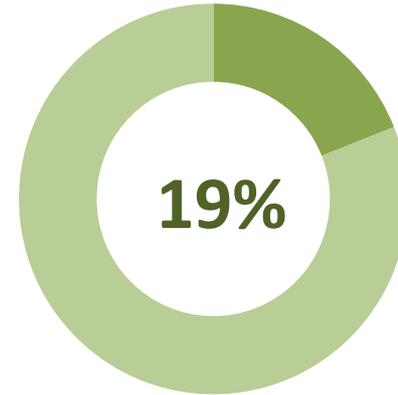
RESPONSIBLE LIVING

27%
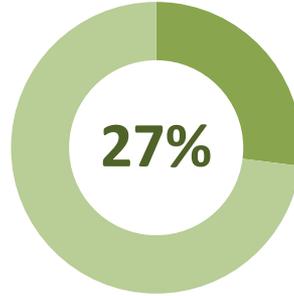
I have become more conscious about the food that I eat and try to make choices that are more positive for the environment

- Strong under 35 years old bias *(especially under 25)*

- High prevalence of fresh fish, fruit, rice, noodles, seeds/ nuts, salad, vegan, pulses, herbs, oils *(not sunflower)*

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Ethical considerations when choosing evening meals are significantly more important now than in 2011.

% Very Important when choosing Evening Meals

2011

2019

15% increase in importance

38%

23%

Ethical Considerations :
Environmental factors, Fairtrade,
food miles etc..

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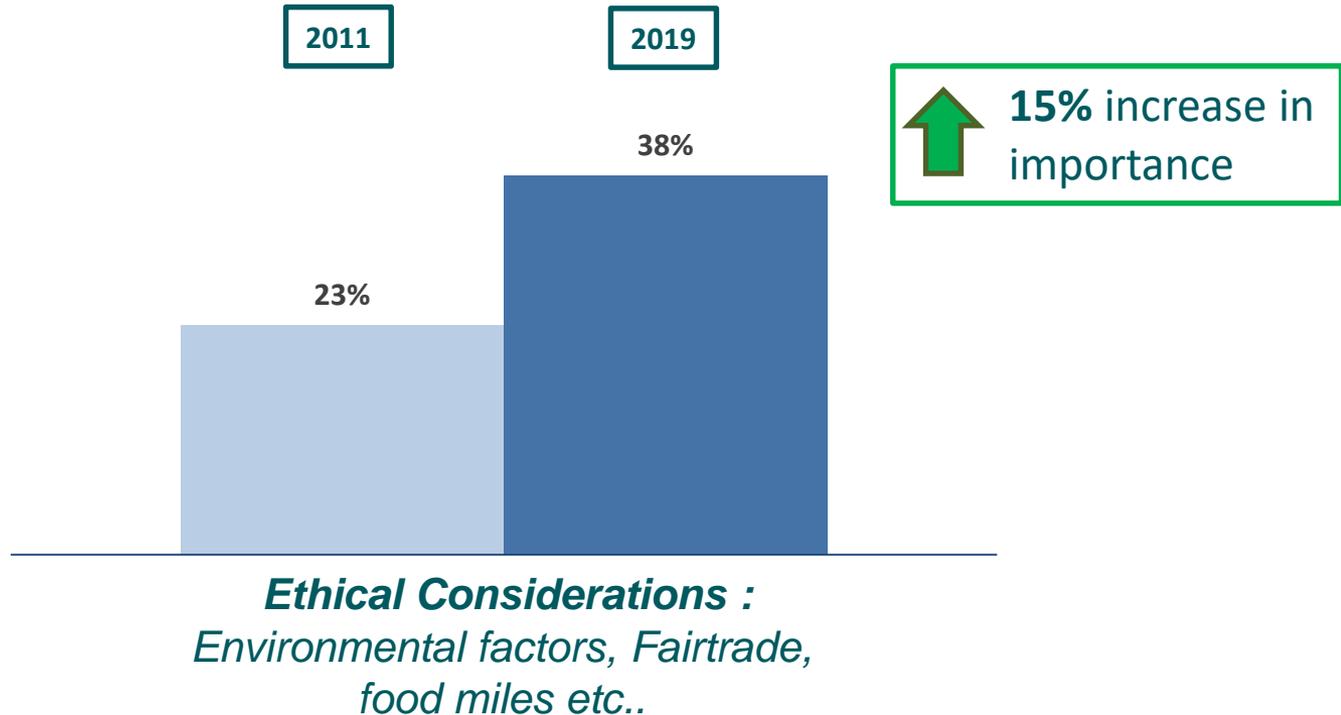
We also claim to be placing a greater emphasis on Provenance nowadays vs. 2011.

% AGREE

% Very Important when choosing Evening Meals

2019

+6%

76%
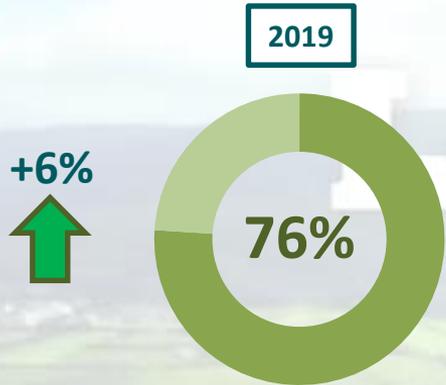
*We **use Irish produce** where possible*

2019

+10%

65%

*Food of Irish origin is **worth paying a little more for***

2019

+5%

43%

***Irish Origin :** That the food is Irish where possible*

SOURCE: Evening Meal Recruitment Survey 2019 (n=1,013 adults)
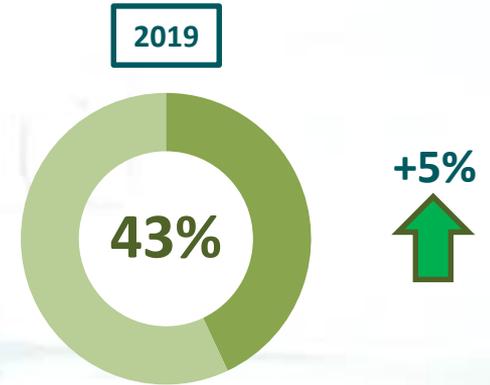
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Comparing Drivers of Choice for Evening Meals between 2011 and 2019 among Irish adults.

% Very Important when choosing Evening Meals

	2011	2019	DIFFERENCE 2019-2011
The Taste : That it tastes great	90%	89%	-1
Quality : That it is top quality food	76%	72%	-4
Nutritional Value : How healthy and nutritious it is	68%	70%	+2
Suits Everyone : That everyone in the home will enjoy it	78%	69%	-9
The **cost of the meal** or ingredients	62%	60%	-2
Irish Origin : That the food is Irish where possible	38%	43%	+5
Ethical Considerations : Environmental factors, Fairtrade, food miles etc..	23%	38%	+15
Convenience : How easy it is to prepare and cook	36%	38%	+2
Organic : Organic foods are much better where possible	23%	26%	+3

SOURCE: Evening Meal Recruitment Survey 2019 (n=1,013 adults)

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When it comes to evening meals, we see the impact our 'busier lives' is having on choice.

46%

46% of us claim the we actually enjoy cooking – but only when there is time!
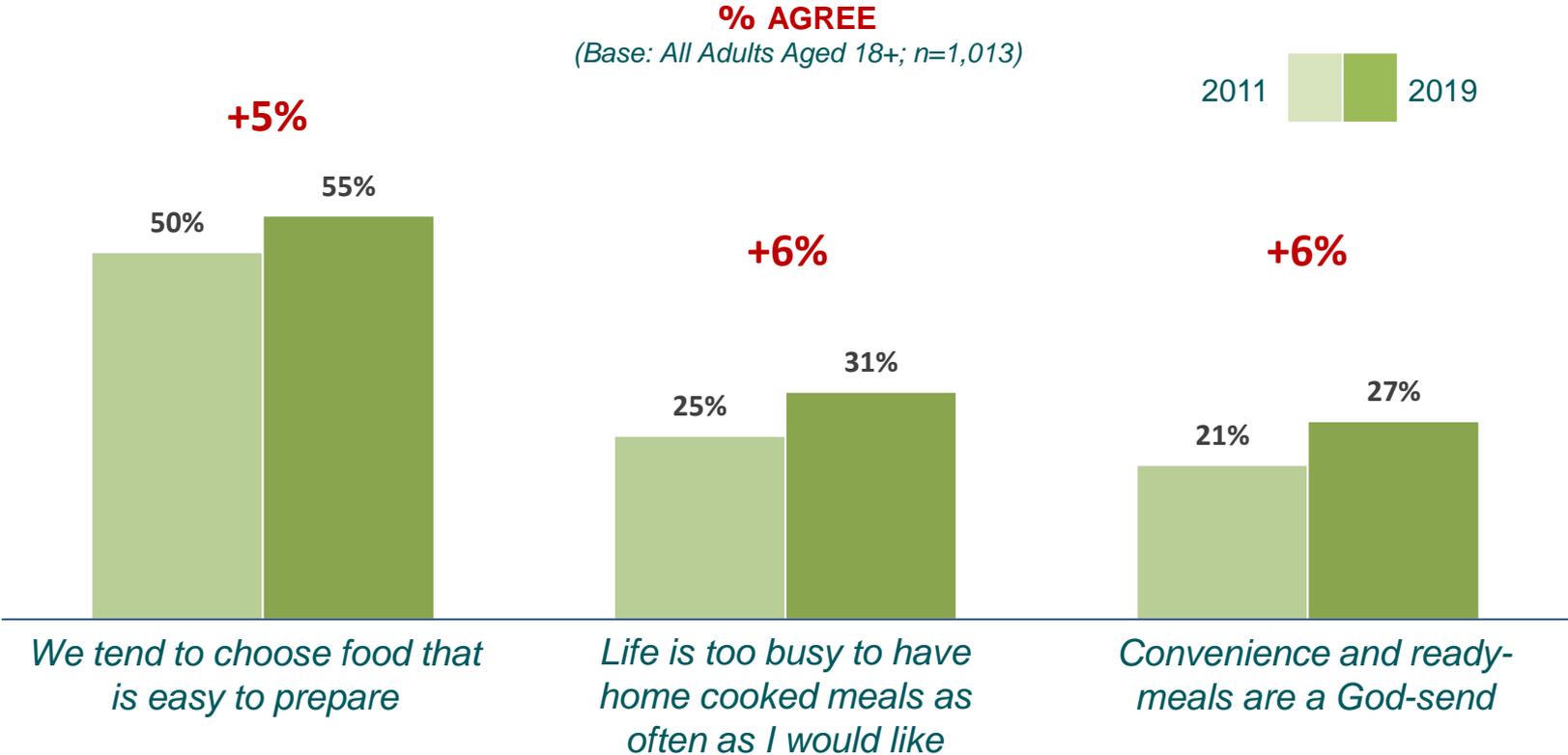
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Compared to 2011, the impact of Convenience on attitudes towards and choice of evening meal has increased.

% AGREE
(Base: All Adults Aged 18+; n=1,013)

2011   2019

+5%

50%   55%

+6%

25%   31%

+6%

21%   27%

We tend to choose food that is easy to prepare

Life is too busy to have home cooked meals as often as I would like

Convenience and ready-meals are a God-send

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More time pressured lifestyles has driven less 'Scratch Cooking' behaviour for evening meals compared to 2011.

Scratch Cook Every day or Most Days

2011

2019

42%

30%

12% decrease
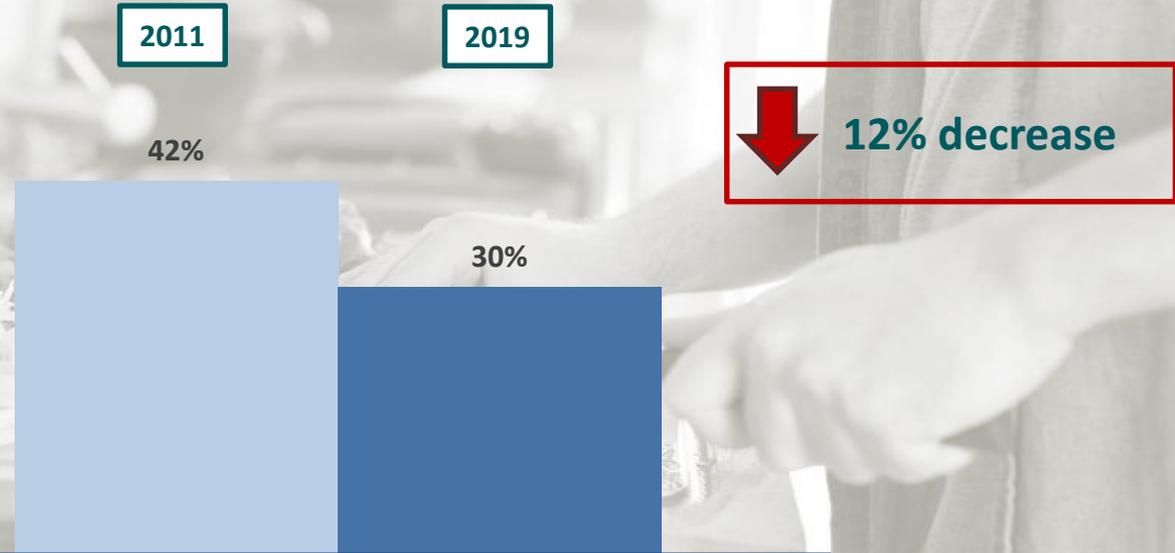
Prepare evening meals from scratch using only fresh/ raw ingredients (i.e. not ready meal solutions)

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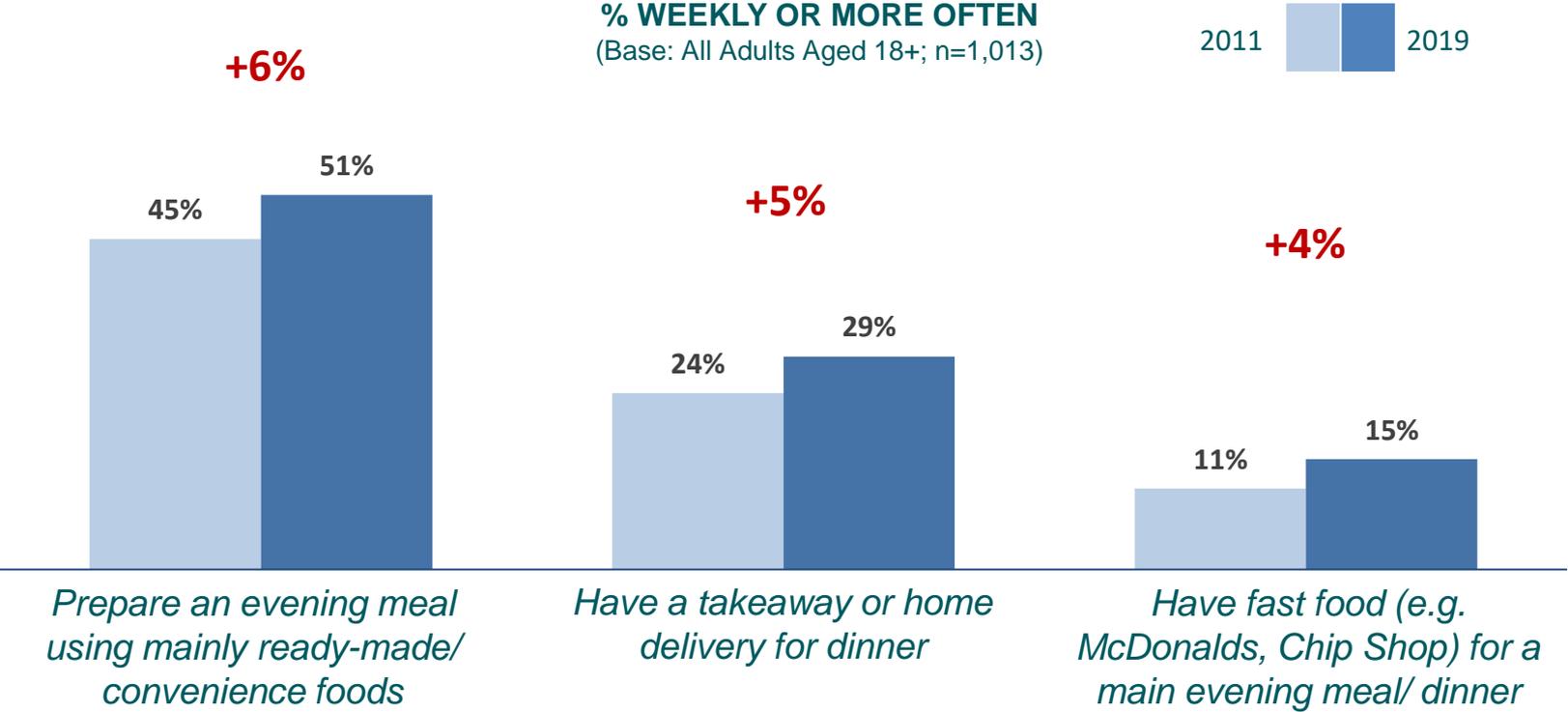# This is further referenced through the increased weekly penetration of using ready made convenience foods, takeaways & home deliveries and fast food.

% WEEKLY OR MORE OFTEN
(Base: All Adults Aged 18+; n=1,013)

2011 ▢ ▮ 2019

+6%

45% → 51%

Prepare an evening meal using mainly ready-made/ convenience foods

+5%

24% → 29%

Have a takeaway or home delivery for dinner

+4%

11% → 15%

Have fast food (e.g. McDonalds, Chip Shop) for a main evening meal/ dinner

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In fact, almost 1 in 10 of all our evening meals are a Takeaway or Home Delivery.

LOCATION AND TYPE OF LAST NIGHTS EVENING MEAL (n=6047)
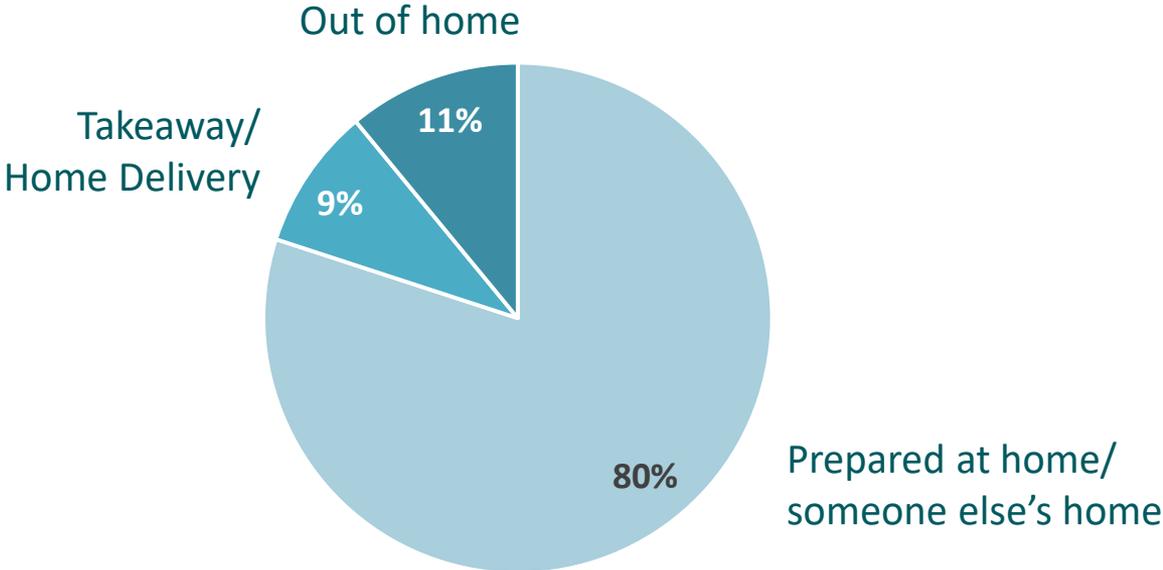
SOURCE: Evening Meal Diary Survey 2019 (n=6,047 meals)

Understanding the Takeaway & Home Delivery Consumer

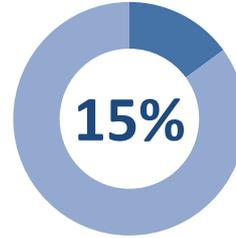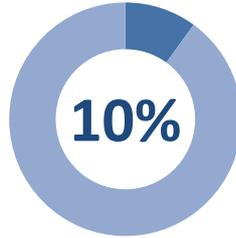10% of all evening meals at home are takeaways or home deliveries…

10% → **15%**

… however this rises to 15% on a Friday and Saturday

TAKEAWAY PROFILE

➢ Almost **half** of all takeaways (47%) are done by **under 35's**

➢ **More prevalent outside Dublin**

➢ **33%** of all takeaways ordered are **Chinese food**

HOME DELIVERY PROFILE

➢ Almost **6 in 10** of all home deliveries (57%) are done by **under 35's**

➢ **Strong Dublin/ Urban bias**

➢ **35%** of all home deliveries ordered are **Pizza**

➢ **2 in 3 (67%)** of home deliveries are done **online**

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Our 'busy lives' and the growth of convenience has placed a lower emphasis on the importance of finding inexpensive meals solutions.

% AGREE
(Base: All Adults Aged 18+; n=1,013)

2011 ▮ ▮ 2019

62%

52%

10% decrease
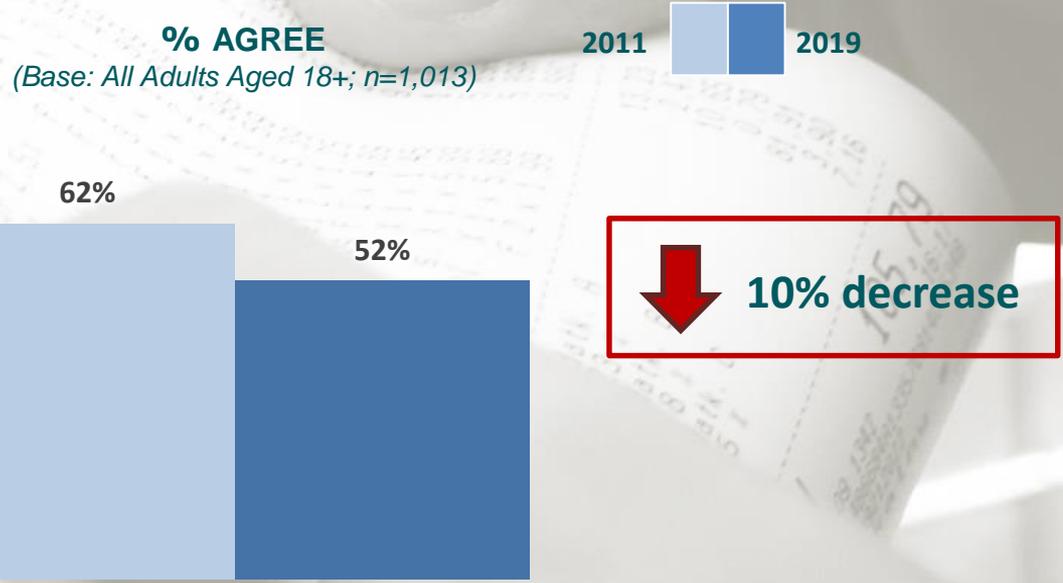
*Nowadays, **finding inexpensive meal solutions is more important***

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This has contributed to the rise in 'top up' shopping behaviour for evening meals over time.

2011　2019

We do **1 big shop** which includes everything for the weeks evening meals

We do **a big shop and then top up** as required during the week

16% decrease

34%

18%

53%

66%

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So much so that almost half of us claim to have no idea what we will be having for tomorrow night's evening meal – significantly up from 2011.

At this stage, do you know what you will be having for tomorrow night's evening meal?

2011   2019

65%

53%

Already Planned/ Fair Idea

2011   2019

⬆ **12% increase**

47%

35%

No Idea

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Attitudes to Cooking and how things have changed

Fractured Mealtimes

17% of all evening meals in the last 7 days were not main meal focused, with 8% either a snack or something on the go.

ALL EVENING MEALS IN THE LAST 7 DAYS (n=6114)

Regular/standard evening meal
(main meal)

75%

A smaller meal
(not main meal)

A snack to keep me going

Something on the go

9%

5%

3%

Formal evening meal
(to mark an occasion)

5%

(Other: 2%)
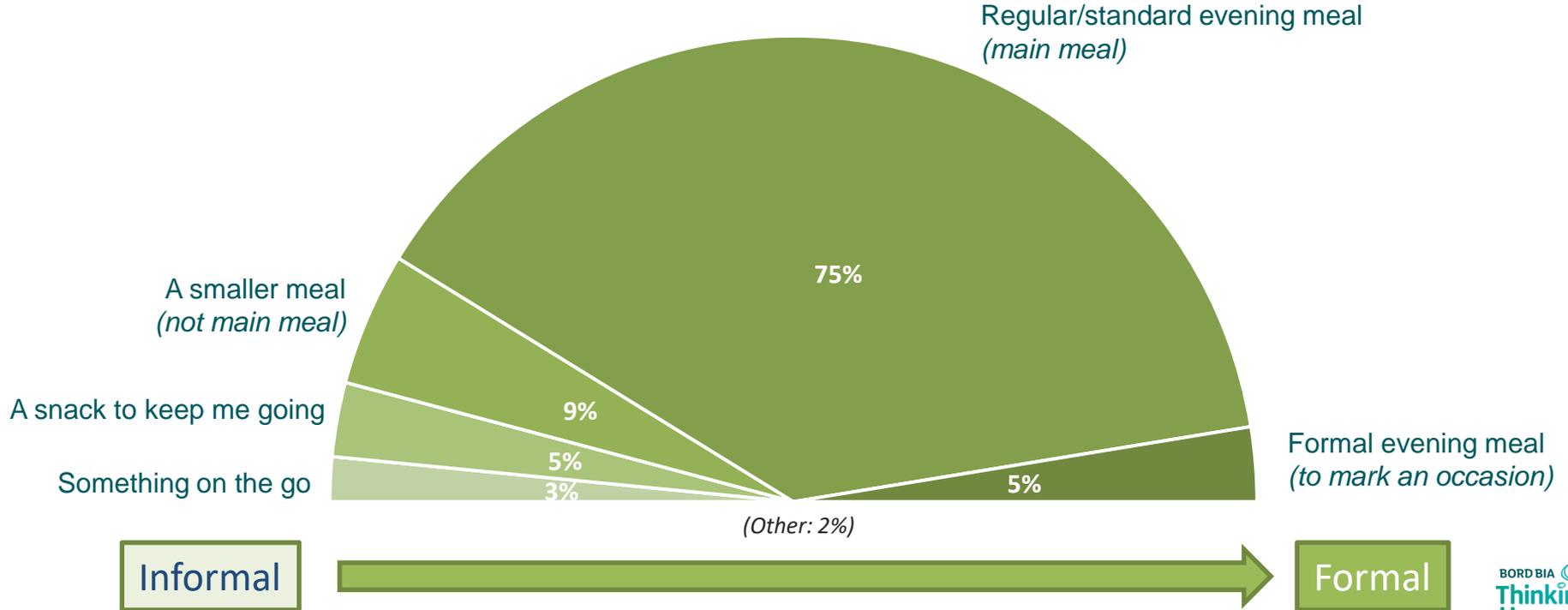
Informal → Formal

The more informal and formal Evening Meals are clearly more weekend focused.
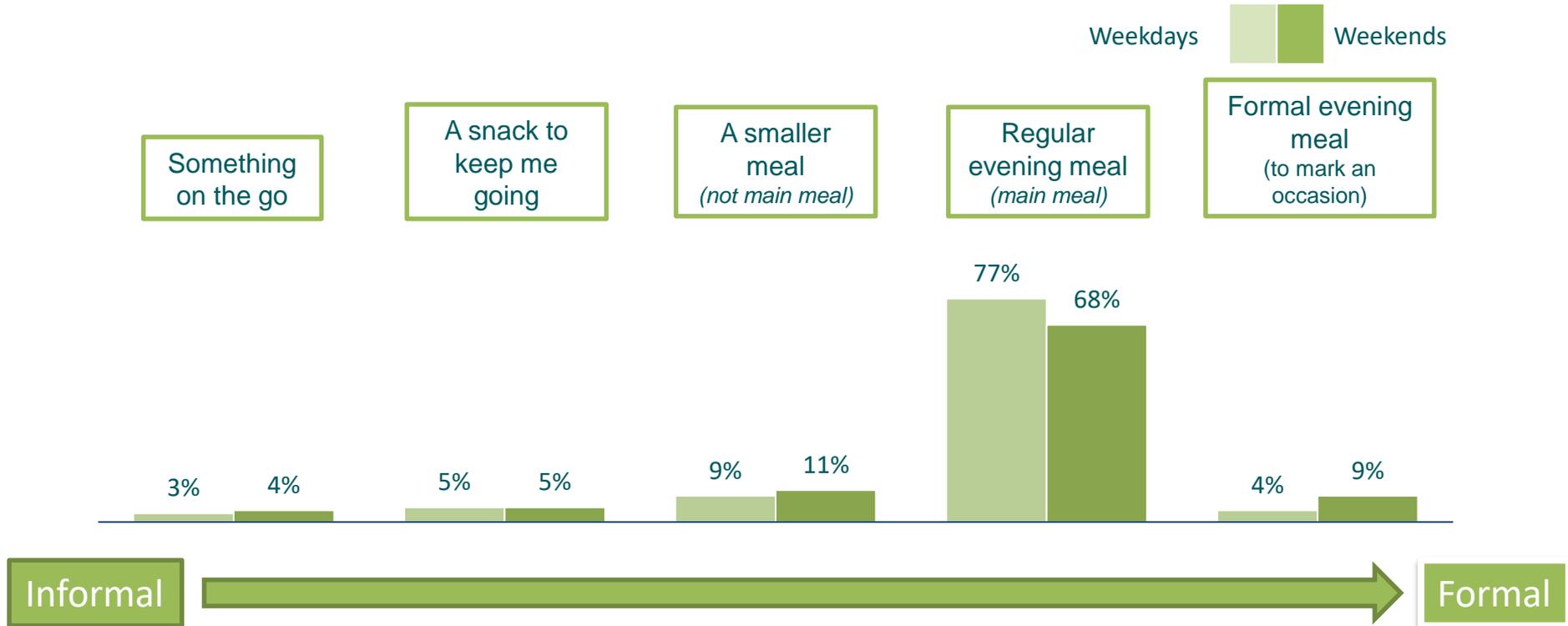

Weekdays ▢ ▢ Weekends

| Something on the go | A snack to keep me going | A smaller meal *(not main meal)* | Regular evening meal *(main meal)* | Formal evening meal *(to mark an occasion)* |

3% | 4% | 5% | 5% | 9% | 11% | 77% | 68% | 4% | 9%

Informal ➡ Formal

SOURCE: Evening Meal Diary Survey 2019 (n=6,114 meals)

The importance of 'Household Suitability' when choosing evening meals has fallen sharply since 2011.

% Very Important when choosing Evening Meals

2011

2019

78%

69%

9% decrease
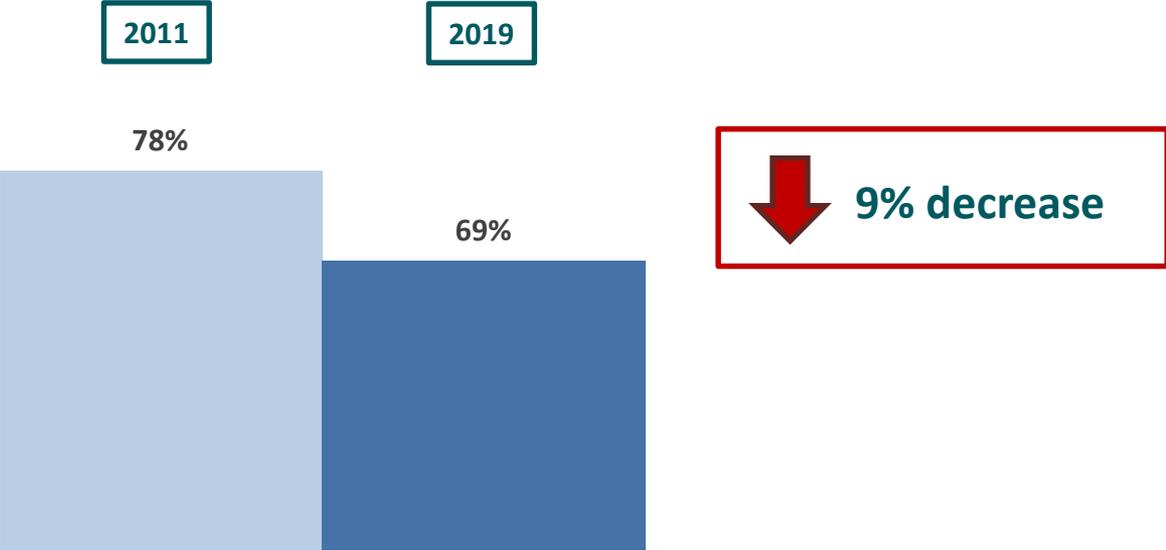
Suits Everyone :
That everyone in the household
will enjoy it

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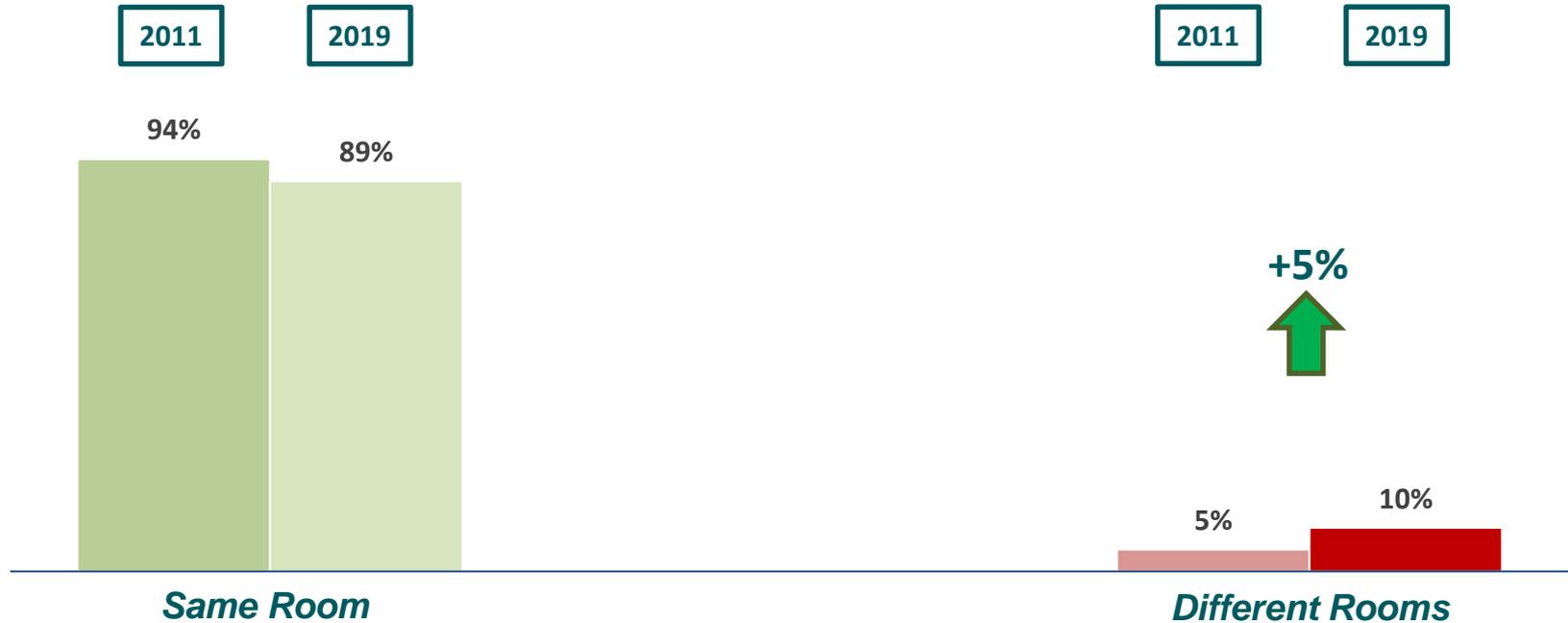# For households with more than 1 person, over 8 in 10 had the same meal, but the incidence of preparing different meals has risen from 1 in 10 in 2011 to almost 2 in 10 in 2019.

Did all of you have the same meal or different meals for different people?
(n=3943 meals)

2011	2019

2011	2019

88%

82%

+6%

11%

17%

Same Meal

Different meals
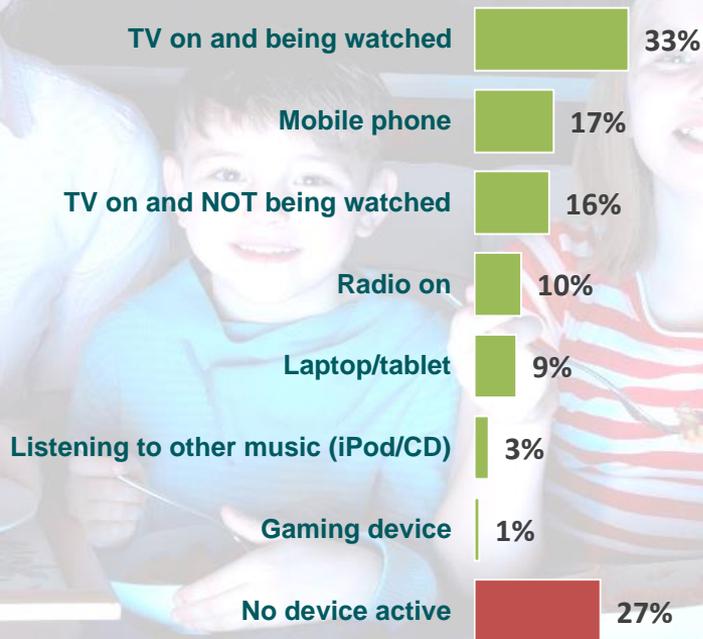
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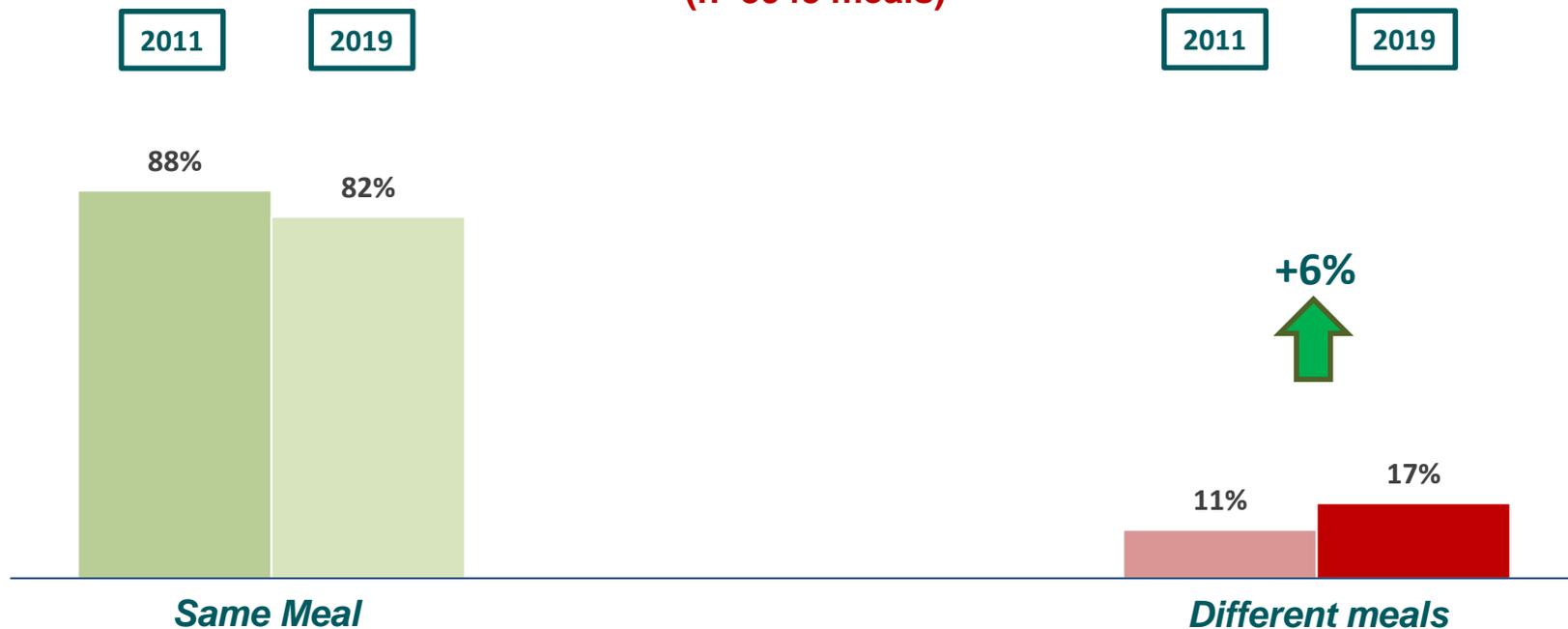
1 in 10 evening meals at home are eaten in different rooms - up from 1 in 20 in 2011.

Which of these describes where last night's evening meal was consumed?
(n=3943 meals)

| 2011 | 2019 | | 2011 | 2019 |

94%   89%

+5%

5%   10%

Same Room   *Different Rooms*

SOURCE: Evening Meal Diary Survey 2019 (n=3,943 meals)

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Just 27% of evening meals in Ireland involve no device being active.

Devices active at last night's evening meal at home?
(n=5353 meals)

Device	%
TV on and being watched	33%
Mobile phone	17%
TV on and NOT being watched	16%
Radio on	10%
Laptop/tablet	9%
Listening to other music (iPod/CD)	3%
Gaming device	1%
No device active	27%

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Between 6 and 7 is the average and median time for evening meal consumption at home, with more evening meal penetration happening before 6pm among family life-stages.

■ With kids ■ No kids

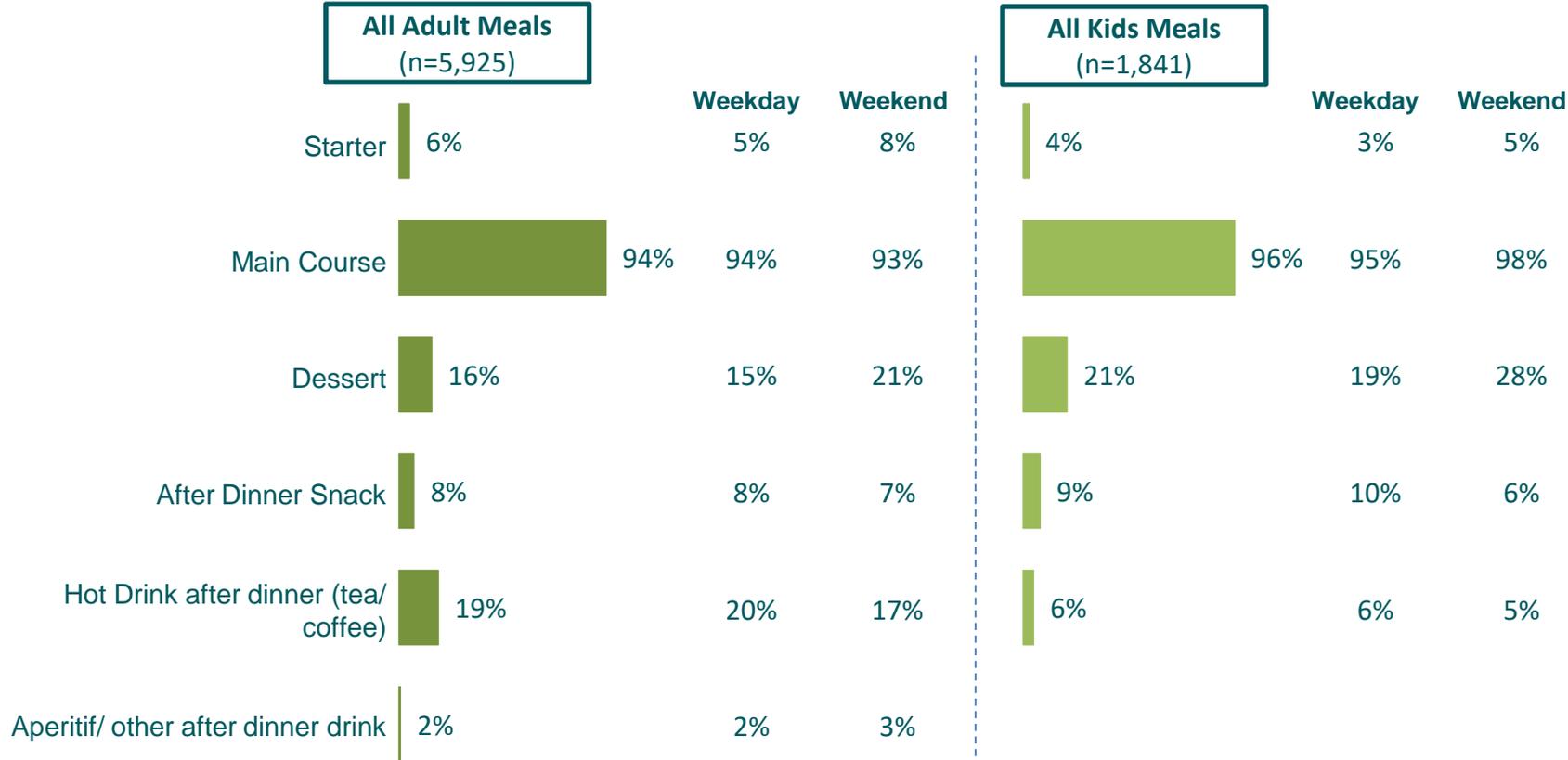| Time	With kids	No kids
Before 4pm	3%	4%
4 - 4.59pm	8%	5%
5 - 5.59pm	25%	17%
6 - 6.59pm	33%	33%
7 - 7.59pm	19%	22%
8 - 8.59pm	9%	11%
9 - 9.59pm	3%	5%
10pm or after	1%	3%
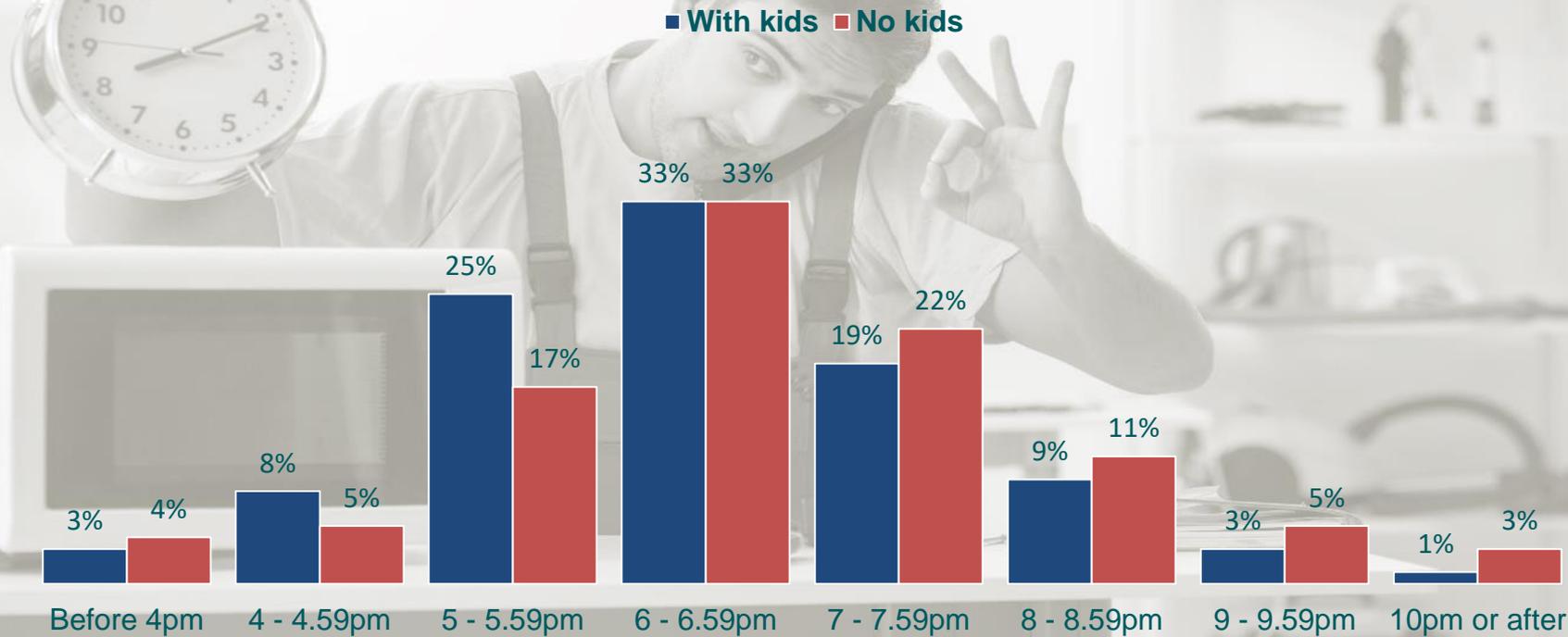
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All Evening Meals

All Evening Meals

Overall Course Uptake

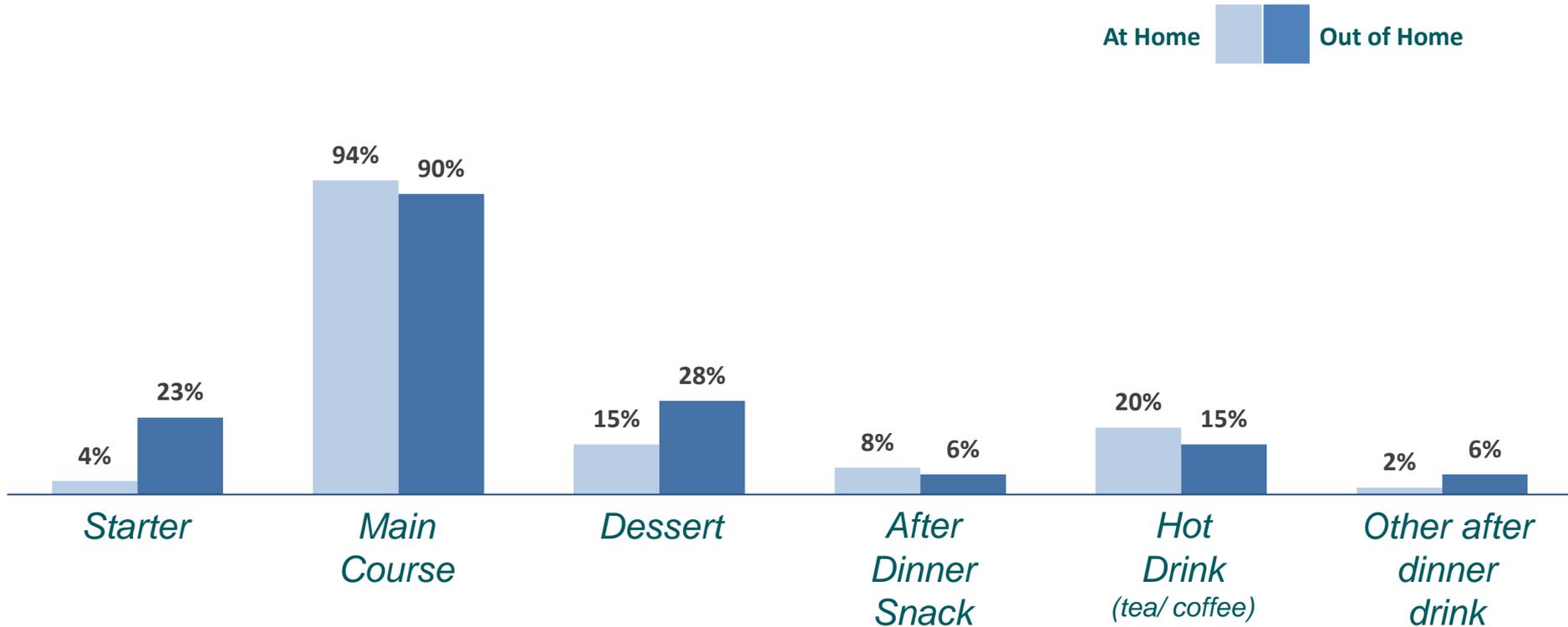# Which Courses were on the Menu last night?

Starters and Desserts clearly more prevalent at the weekend for adults and kids, with almost 3 in 10 kids meals involving at dessert at the weekend.

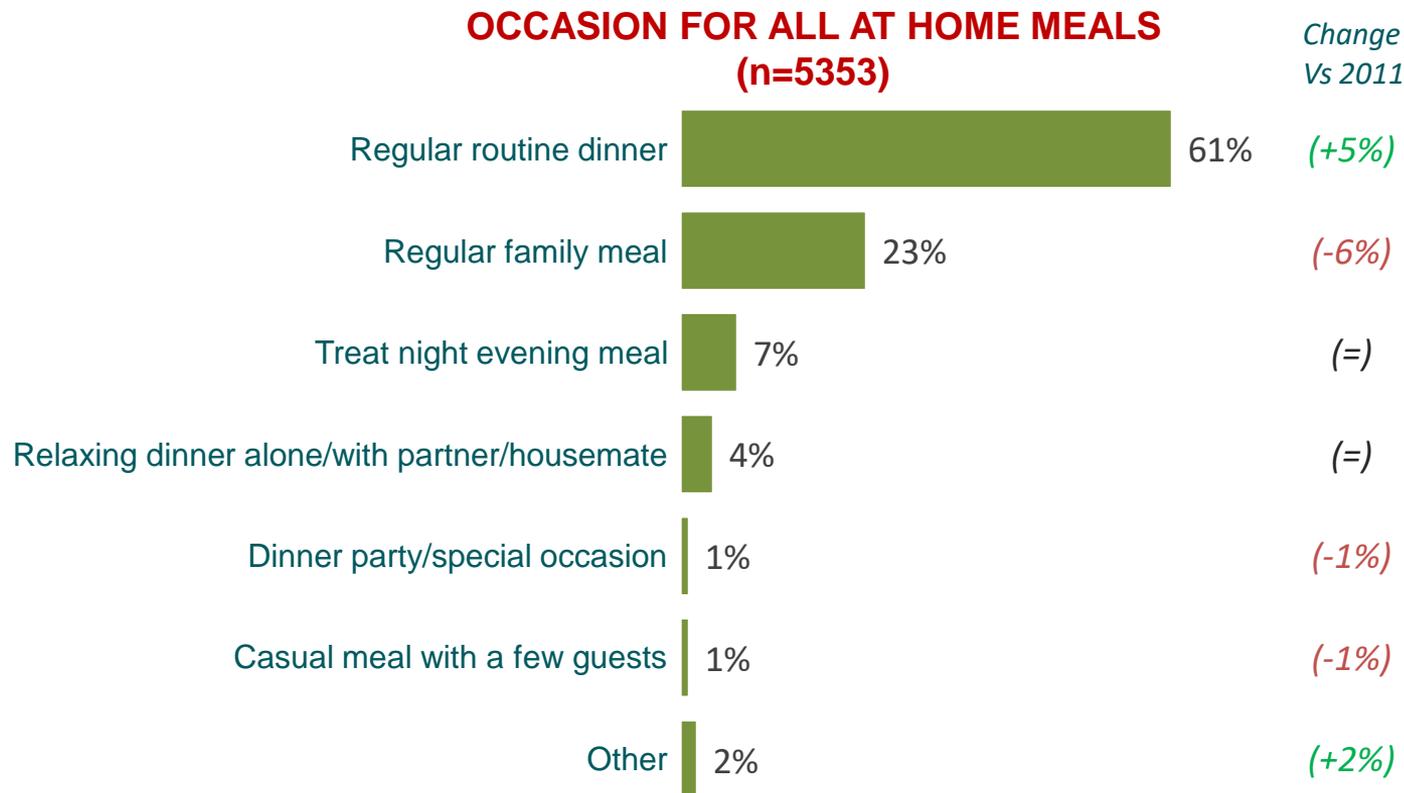|	**All Adult Meals** (n=5,925)	**Weekday**	**Weekend**		**All Kids Meals** (n=1,841)	**Weekday**	**Weekend**
Starter	6%	5%	8%		4%	3%	5%
Main Course	94%	94%	93%		96%	95%	98%
Dessert	16%	15%	21%		21%	19%	28%
After Dinner Snack	8%	8%	7%		9%	10%	6%
Hot Drink after dinner (tea/coffee)	19%	20%	17%		6%	6%	5%
Aperitif/ other after dinner drink	2%	2%	3%				

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Starters and Desserts much more out of home related, but Hot Drinks most prevalent at home. Almost 1 in 10 of us had an after dinner snack at home.

Legend: At Home (light blue) | Out of Home (dark blue)

	At Home	Out of Home
Starter	4%	23%
Main Course	94%	90%
Dessert	15%	28%
After Dinner Snack	8%	6%
Hot Drink (tea/ coffee)	20%	15%
Other after dinner drink	2%	6%

Evening Meals

Main Course Focus at home

Regular routine dinner still the dominant occasion for evening meals at home, but a fall in the regular family meal occasion is evident in line with busier lives.
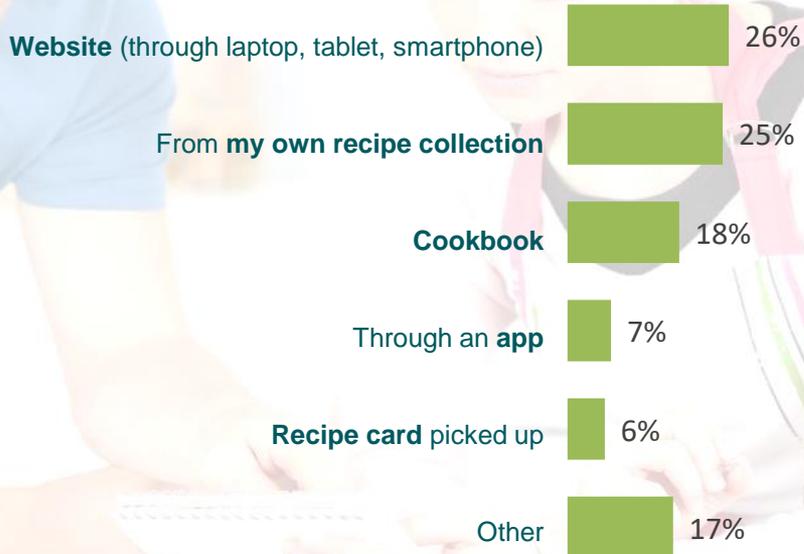
**OCCASION FOR ALL AT HOME MEALS
(n=5353)**

*Change
Vs 2011*

Occasion	%	Change
Regular routine dinner	61%	*(+5%)*
Regular family meal	23%	*(-6%)*
Treat night evening meal	7%	*(=)*
Relaxing dinner alone/with partner/housemate	4%	*(=)*
Dinner party/special occasion	1%	*(-1%)*
Casual meal with a few guests	1%	*(-1%)*
Other	2%	*(+2%)*

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Just over 1 in 10 of us followed a recipe for last nights Evening Meal, with following via a website more prevalent than a cook book or private collection.

11%

% that followed a recipe for last night's evening meal

ACCESS METHOD FOR RECIPE (n=397)

Method	%
Website (through laptop, tablet, smartphone)	26%
From **my own recipe collection**	25%
Cookbook	18%
Through an **app**	7%
Recipe card picked up	6%
Other	17%

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The Classic Meat & Two Veg remains the most prevalent type of Adult evening meal consumed at home in Ireland, but notably down since 2011. Rise of Italian foods and Lighter meals more evident today.

ALL ADULT EVENING MEALS AT HOME

Top 10		2019	Difference 2019 - 2011
1. Classic Meat & Two Veg		11%	-7% ⬇
2. Chicken Dish (e.g. Roast Chicken)		10%	-2% ⬇
3. Pasta with Sauce (e.g. Spaghetti Bolognaise)		10%	-1% ⬇
4. Italian Foods (e.g. Lasagne, Pizza)		9%	+2% ⬆
5. Diner-Style Favourites (e.g. Burger & Chips, Steak & Chips)		9%	+1% ⬆
6. Fish Dish (e.g. Fish Bake, Fish & Chips)		7%	-3% ⬇
7. Light Meal (Bean/ Spaghetti on Toast, Soup, Toastie etc.)		7%	+3% ⬆
8. Chinese/ Oriental Meal		6%	+1% ⬆
9. Stew or Casserole Dish		6%	=
10. Indian Dish (e.g. Chicken Tikka Marsala, Korma, Curry etc.)		5%	-1% ⬇

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For kids, Pasta with Sauce is the most prevalent meal at home – even up since 2011 with the most notable decline for Classic Meat & Two Veg. Italian and Oriental food on the rise in Ireland for our kids.

Top 10		2019	Difference 2019 - 2011
1. Pasta with Sauce (e.g. Spaghetti Bolognaise)		14%	+1% ⬆
2. Chicken Dish (e.g. Roast Chicken)		12%	-1% ⬇
3. Classic Meat & Two Veg		11%	-6% ⬇
4. Italian Foods (e.g. Lasagne, Pizza)		10%	+2% ⬆
5. Diner-Style Favourites (e.g. Burger & Chips, Steak & Chips)		9%	=
6. Stew or Casserole Dish		6%	-2% ⬇
7. Fish Dish (e.g. Fish Bake, Fish & Chips)		6%	-2% ⬇
8. Chinese/ Oriental Meal		6%	+2% ⬆
9. Indian Dish (e.g. Chicken Tikka Marsala, Korma, Curry etc.)		5%	+1% ⬆
10. Light Meal (Bean/ Spaghetti on Toast, Soup, Toastie etc.)		4%	+1% ⬆

ALL KIDS EVENING MEALS AT HOME

SOURCE: Evening Meal Diary Survey 2019 (n=1,716 kids meals at home)

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Adult & Child Actual Meal Comparison (consumed at home)

(HIGHER)

ADULT ACCESS

FAMILY FAVOURITES

Adult Penetration →

ADULT ACCESS	FAMILY FAVOURITES
Chilled/ Fresh Ready Meal	Pizza
Chinese Stir Fry	Spaghetti Bolognese
Sandwiches/ Toasties	Roast Chicken Dish
Steak	Burger/ Fish & Chips
Vegetarian	Indian Curry
Salad with Chicken	Lasagne
Other Light Meal	Irish Stew
Fish Pie	Chicken Nuggets/ Tenders
Chicken Stir Fry	Chicken Casserole
Stroganoff	Pasta with Chicken
Vegetable Stew	Scrambled Egg Dish
Chilli Con Carne	Cottage Pie
Caesar Salad	Pasta with Meatballs
Traditional Fry	Chicken and Accompaniment

(LOWER)

FORMER FAVOURITES

KIDS CORNER

(LOWER) ← Kids Penetration → (HIGHER)

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Evening Meals

Dessert and Drinks Focus

For both adults and kids, Dessert penetration as part of all meals increases throughout the week and spikes at the weekend.

Dessert Incidence of all Meals in last 7 days

ALL ADULTS

16%

ALL KIDS

21%

— **Adults** — **Kids**

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Kids	16%	16%	18%	21%	20%	26%	29%
Adults	13%	13%	15%	15%	17%	19%	23%

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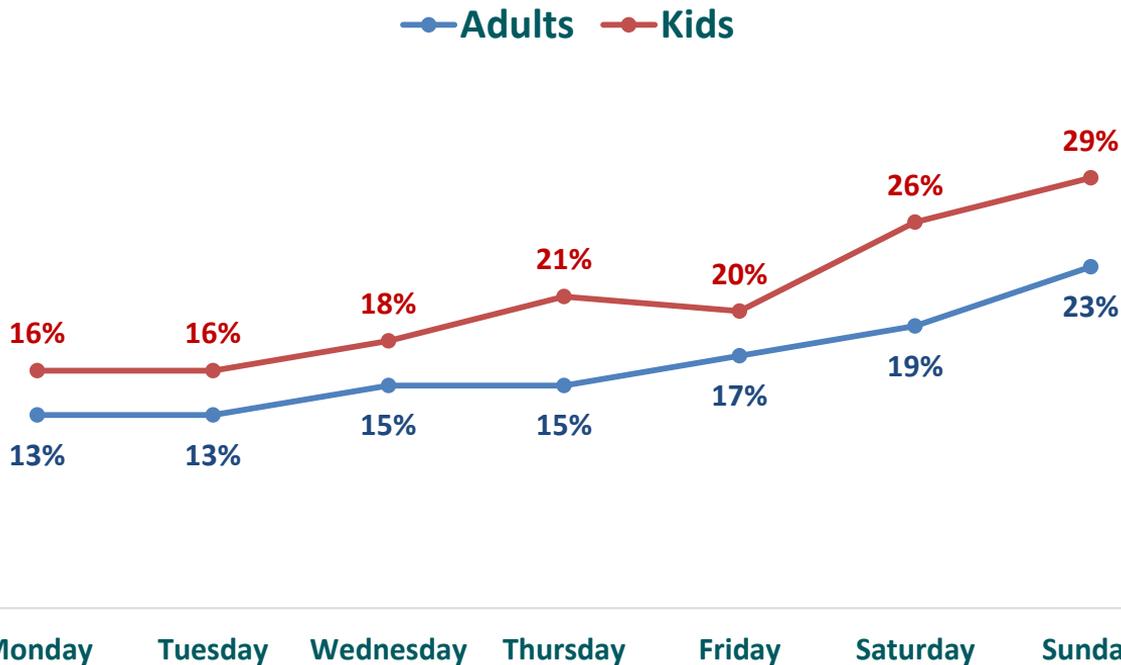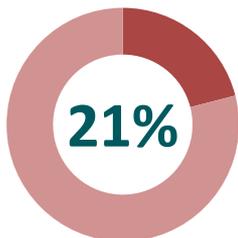
Since 2011 there has been a decline in Dessert incidence with the evening meal for both adults and kids in Ireland.

Dessert Incidence of all Meals in last 7 days

ALL ADULT MEALS
2019

16%
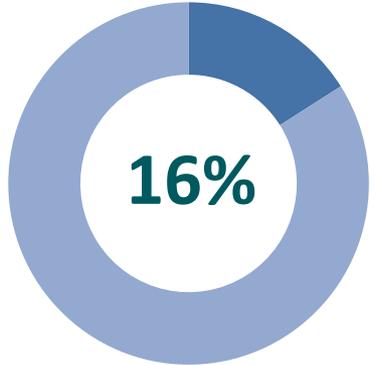
⬇ **8% decline vs 2011**

ALL KIDS MEALS
2019

21%
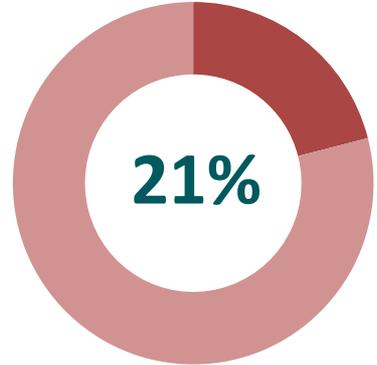
⬇ **10% decline vs 2011**

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking House

Tap Water is the most prevalent drinks accompaniment with our Evening Meals at home in Ireland – even among kids meals where it overtakes Milk now in 2019.

With all Adult Meals (n=5925)
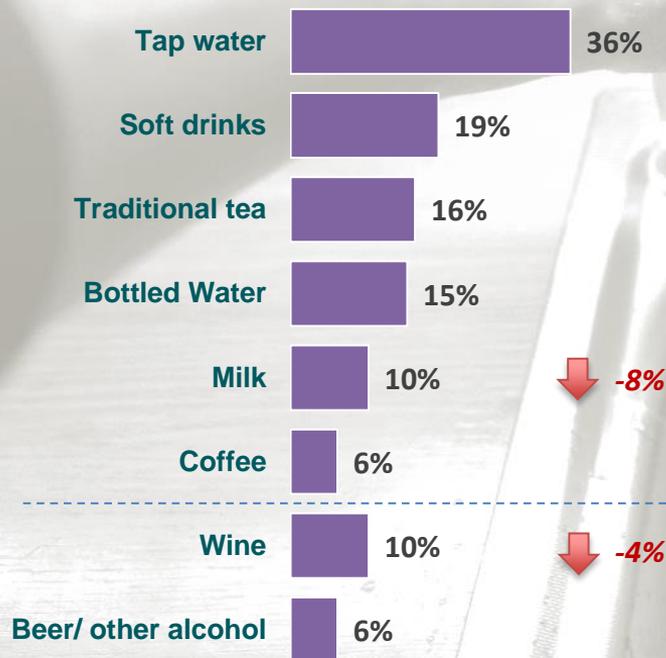
Drink	%
Tap water	36%
Soft drinks	19%
Traditional tea	16%
Bottled Water	15%
Milk	10% -8%
Coffee	6%
Wine	10% -4%
Beer/ other alcohol	6%

With all Kids Meals (n=1841)

Drink	%
Tap water	29% +6%
Milk	21% -11%
Cordial	16%
Soft drinks	14%
Bottled Water	12%
Fruit juice	12%
Traditional tea	4%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking House
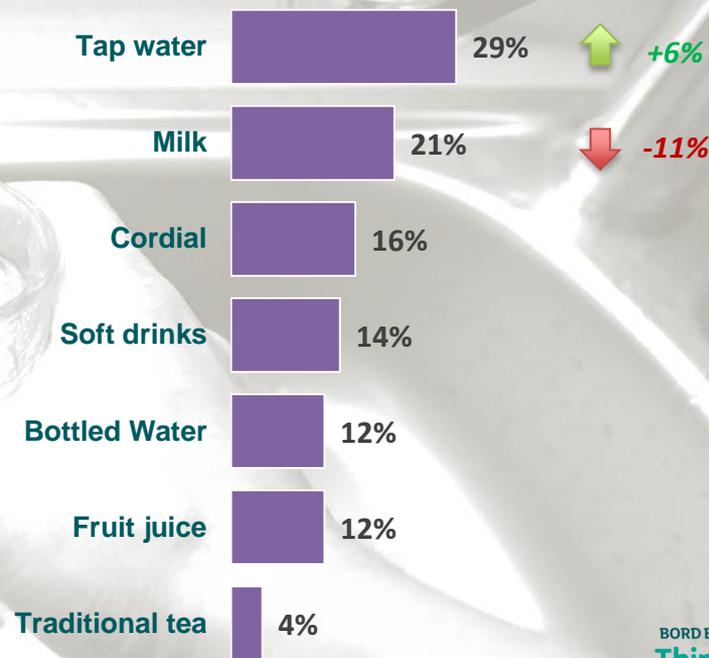
Key Category Performance

Source for all Categories is the Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking House

Meat Review

BORD BIA
Thinking
House

Category & Sub Category Incidence within All Meals

RED MEAT
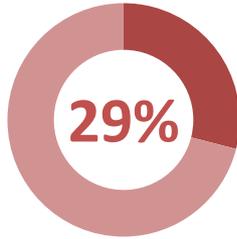
29%

Type Incidence within **ALL meals** in last 7 days

Beef	18%
Pork/ Ham	4%
Bacon/ Rashers	4%
Sausages	3%
Lamb	2%
Cooked Meats	1%

WHITE MEAT

21%

Type Incidence within **ALL meals** in last 7 days

Chicken breast	14%
Chicken whole	4%
Chicken leg	2%
Turkey breast	2%
Chicken wings	1%
Turkey whole	0%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking
House
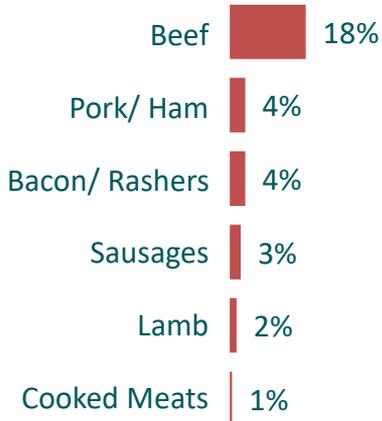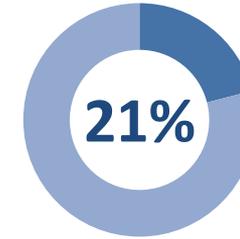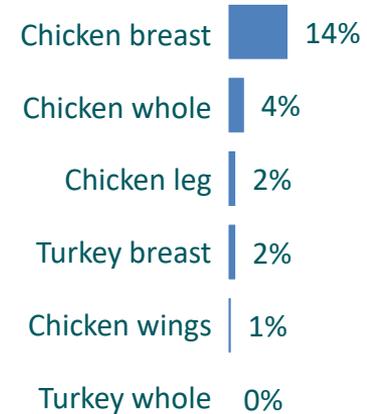
Incidence of Red & White Meat within Age Group (All Meals)

RED MEAT — WHITE MEAT

Age Group	18-24	25-34	35-44	45-54	55-64	65+
Red Meat	20%	26%	33%	33%	33%	32%
White Meat	16%	22%	21%	24%	18%	15%

BORD BIA
Thinking
House
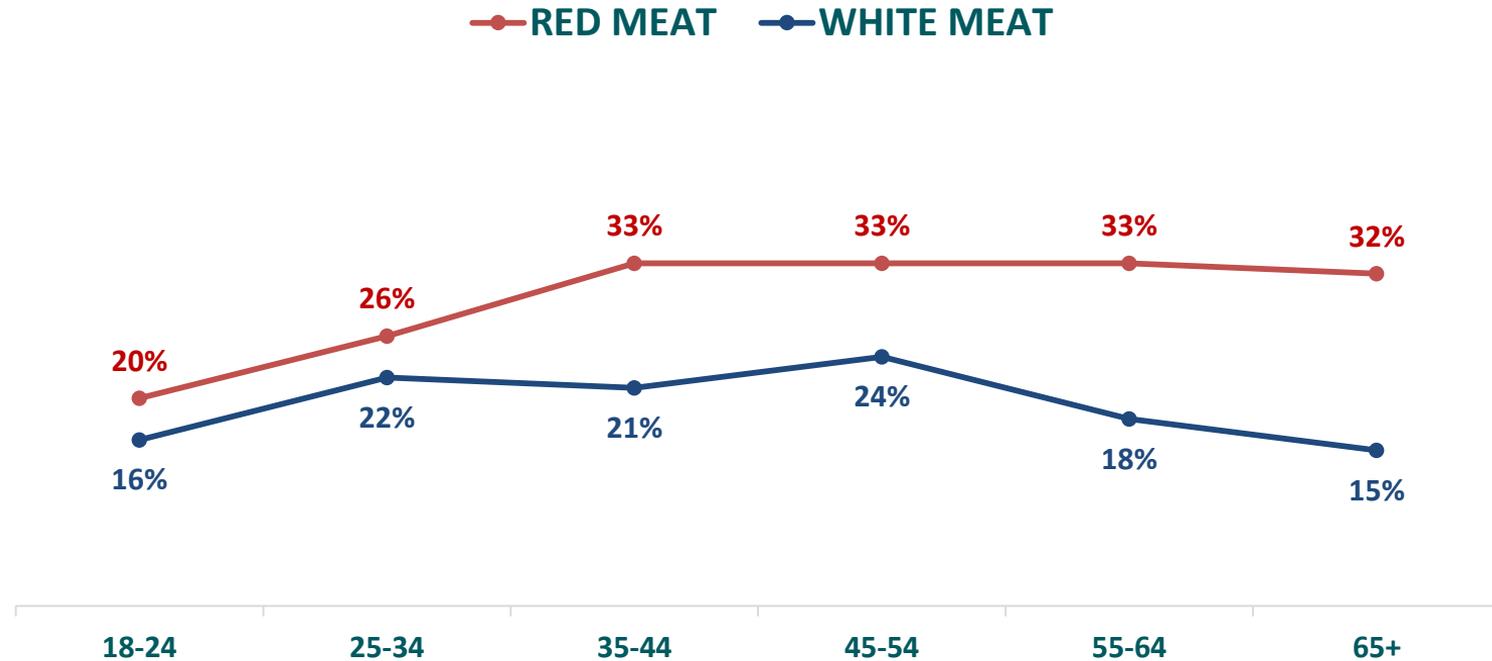
Beef Overview

Incidence within **ALL meals** in last 7 days

18%
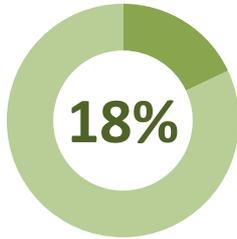
Incidence of Beef usage per day within **ALL meals**
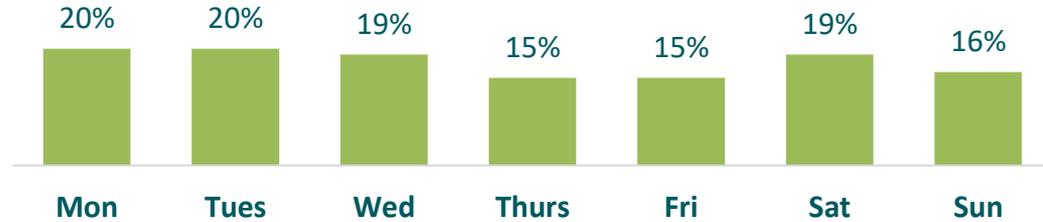
Mon	Tues	Wed	Thurs	Fri	Sat	Sun
20%	20%	19%	15%	15%	19%	16%

Type of Beef used for last nights evening meal?

		Weekday	Weekend
Mince	49%	54%	36%
Steak	18%	17%	21%
Stewing Beef	13%	13%	12%
Burgers	7%	7%	8%
Oven Roast	6%	4%	13%
Meatballs	4%	3%	5%
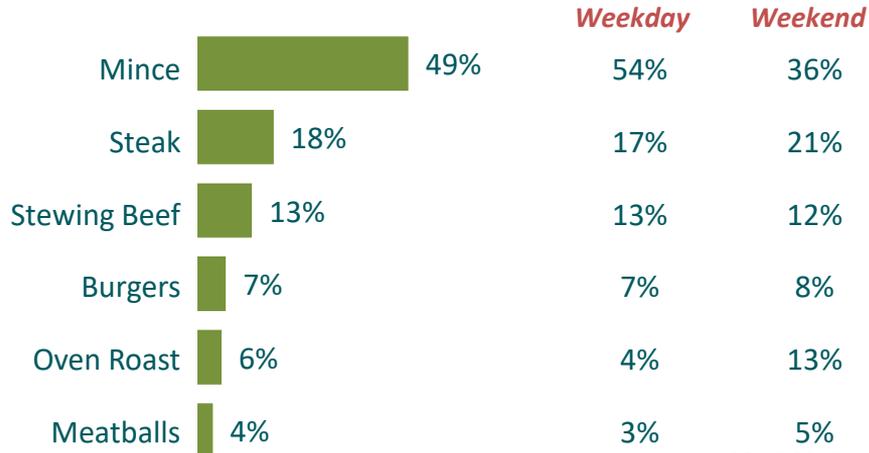
SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

Beef Type Preparation and Main Accompaniments

	Mince	Steak	Stewing Beef
How was this beef cooked at last night's evening meal?			
Fried	61%	50%	8%
Boiled (e.g. casserole)	20%	21%	75%
Oven baked/ roasted	15%	14%	7%
Stir-fried	13%	7%	8%
Grilled	1%	13%	0%
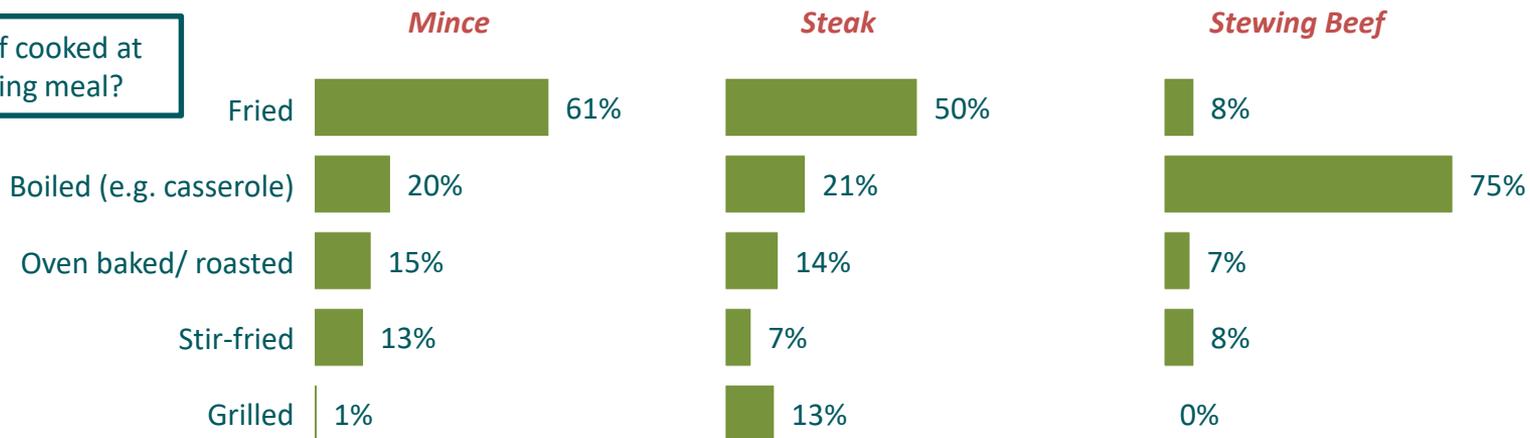
	Mince		Steak		Stewing Beef	
Top 5 accompaniments to the beef consumed at last night's evening meal	1. Pasta/ Spaghetti	*53%*	1. Fresh vegetables	*67%*	1. Fresh vegetables	*78%*
	2. Fresh vegetables	*48%*	2. Potatoes	*48%*	2. Potatoes	*65%*
	3. Cheese	*40%*	3. Herbs	*31%*	3. Herbs	*48%*
	4. Herbs	*40%*	4. Shop bought sauces	*23%*	4. Shop bought sauces	*15%*
	5. Shop bought sauces	*34%*	5. Chips	*20%*	5. Rice	*13%*

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Thinking House

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
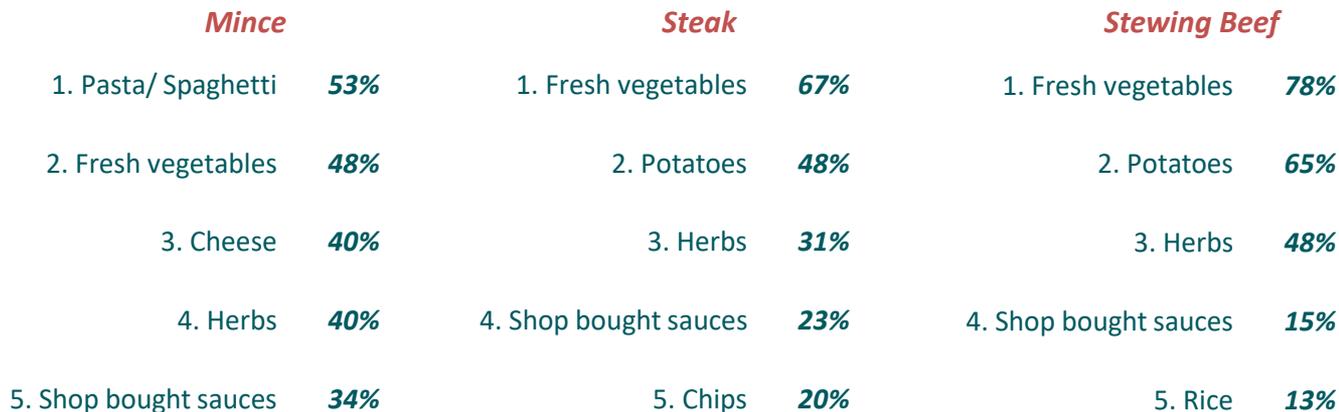
Lamb Overview

Incidence within **ALL meals** in last 7 days

2%
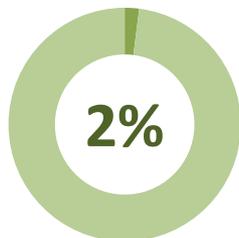
Weekday	Weekend
2%	2%

Top 5 Accompaniments for Lamb

1. Fresh vegetables — *58%*
2. Potatoes — *58%*
3. Chips — *16%*
4. Shop bought sauces — *14%*
5. Pasta/ Spaghetti — *13%*

Type of Beef used for last nights evening meal?

- Chops/ cutlets — 28%
- Minced lamb — 24%
- Leg of lamb — 23%
- Diced lamb — 18%
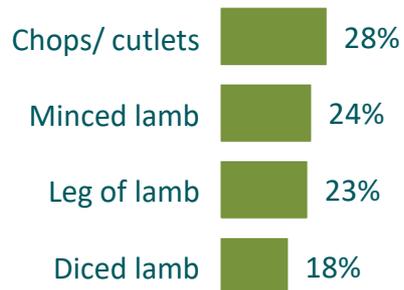
How last night's lamb was cooked?

- Oven baked/ roasted — 26%
- Boiled (e.g. casserole) — 26%
- Fried — 24%
- Grilled — 14%
- Stir-fry — 7%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking
House
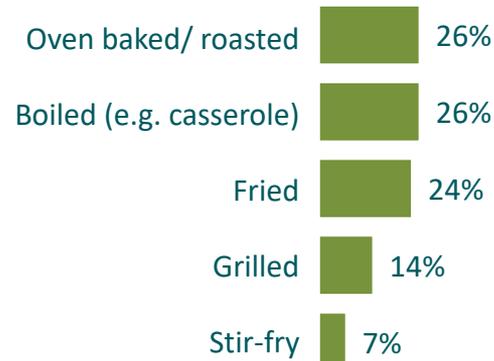
Bacon/ Rashers Overview

Incidence within **ALL meals** in last 7 days

4%
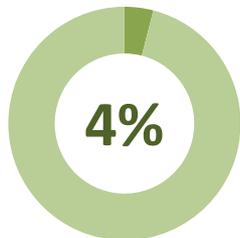
Weekday	Weekend
3%	5%

1. Fresh vegetables **51%**
2. Potatoes **35%**
3. Eggs **29%**
4. Cheese **27%**
5. Bread **25%**

Type of Bacon/ Rashers used for last nights evening meal?

- Packet bacon/ rashers — 77%
- Sliced bacon – butcher counter — 13%
- Turkey/ other rashers — 1%
- Others — 10%
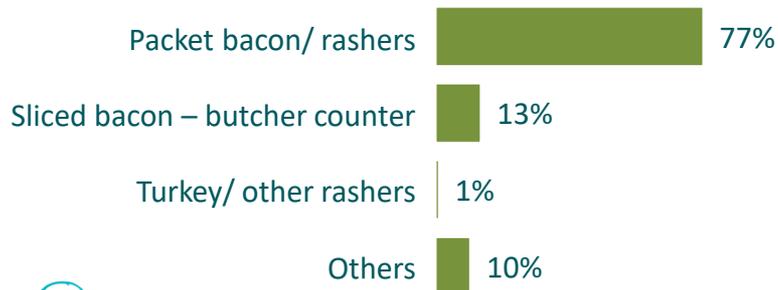
How last night's Bacon/ Rashers was cooked?

- Fried — 50%
- Grilled — 20%
- Oven baked/ roasted — 12%
- Boiled (e.g. casserole) — 9%
- Stir-fry — 6%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking House
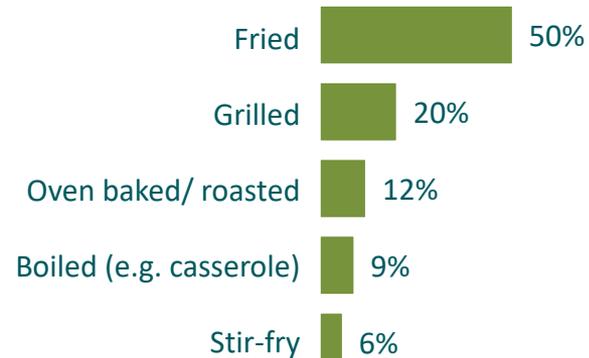
Sausages Overview

Incidence within **ALL meals** in last 7 days

3%
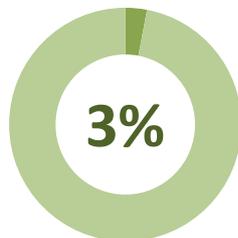
Weekday	Weekend
3%	3%

Top 5 Accompaniments for Sausages

1. Eggs — *33%*
2. Fresh vegetables — *32%*
3. Potatoes — *30%*
4. Bread — *23%*
5. Chips — *14%*

Type of Sausages used for last nights evening meal?

- Packet regular sausages — 64%
- From butcher counter — 14%
- Packet cocktail sausages — 9%
- Chicken sausages — 1%
- Other — 13%
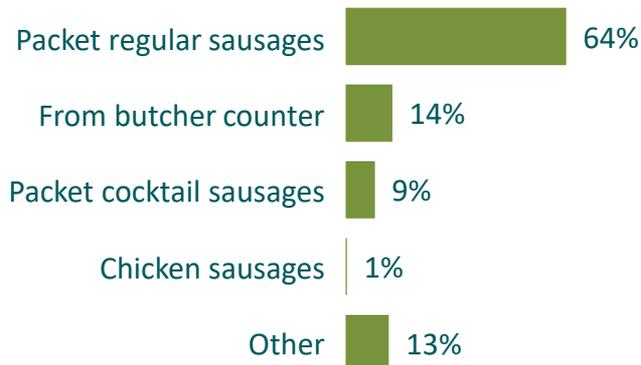
How last night's Sausages were cooked?

- Fried — 49%
- Grilled — 20%
- Oven baked/ roasted — 16%
- Boiled (e.g. casserole) — 12%
- Stir-fry — 3%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking House
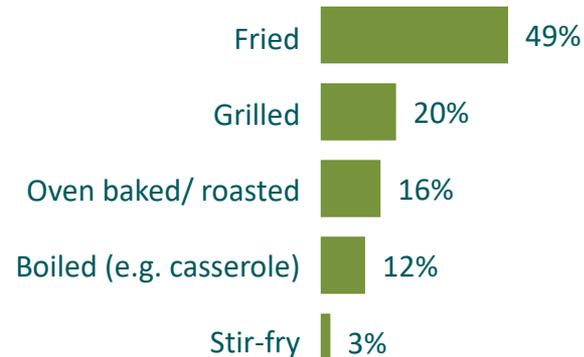
White Meat Overview

Incidence within **ALL meals** in last 7 days

21%

Incidence within **ALL meals** in last 7 days by Age Group

Age Group	Percentage
18-24	16%
25-34	22%
35-44	21%
45-54	24%
55-64	18%
65+	15%
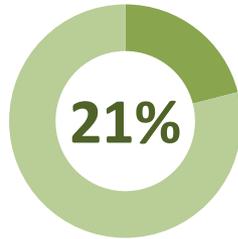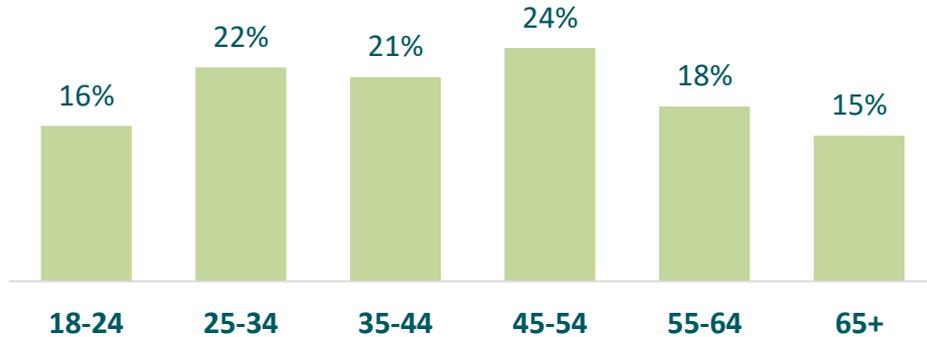
What was White Meat consumed with? *(Top 5)*

Item	Percentage
Fresh vegetables	54%
Condiments/seasoning	42%
Oils	29%
Potatoes	26%
Herbs	25%
Rice	25%
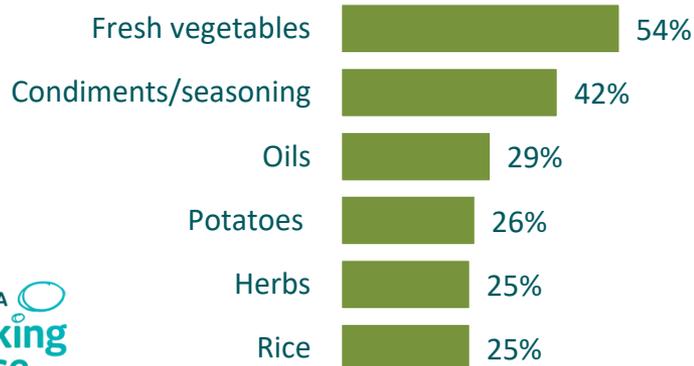
Types of white meat used in last 7 days

Type	Percentage
Chicken breast	69%
Chicken whole	15%
Chicken leg	7%
Turkey breast	7%
Chicken wings	3%
Turkey whole	1%
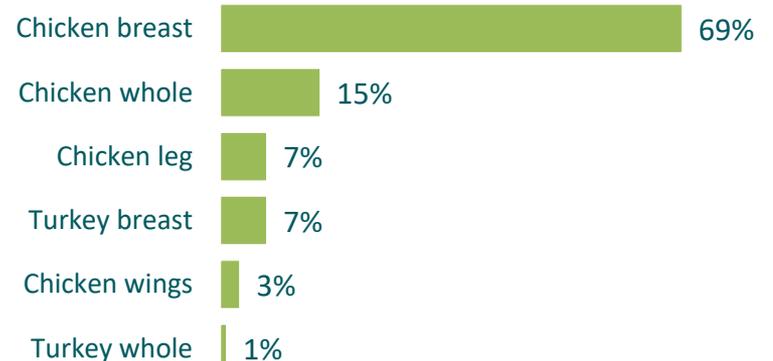
SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

Fish Review

BORD BIA
Thinking House

For both adults and kids, 'Fish Friday' still appears evident relative to other days of the week.

ANY Fish Dish Incidence of all Meals in last 7 days
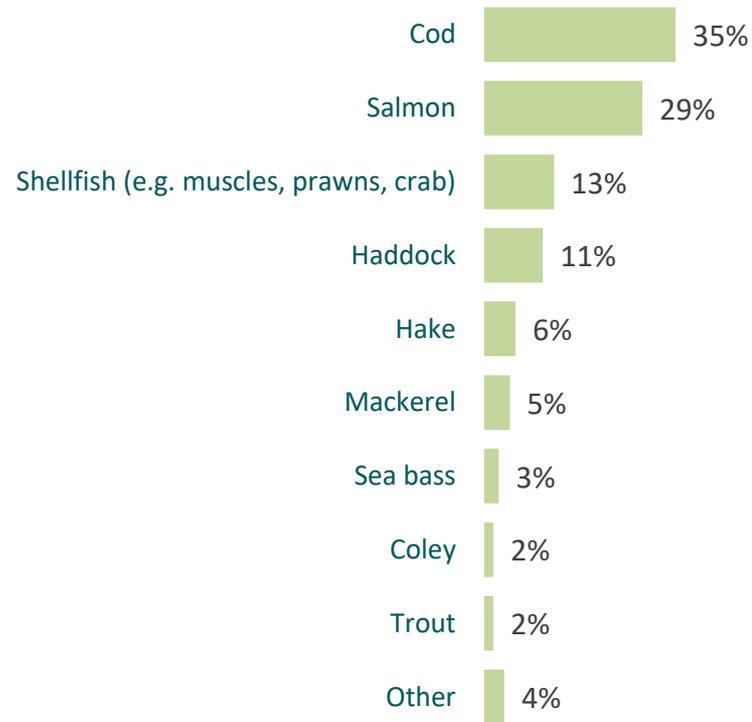
ALL ADULTS

7%

ALL KIDS

6%

— Adults — Kids

Day	Adults	Kids
Monday	6%	4%
Tuesday	7%	6%
Wednesday	7%	5%
Thursday	7%	7%
Friday		11%
Saturday		6%
Sunday		5%
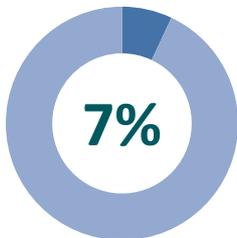
BORD BIA
Thinking House
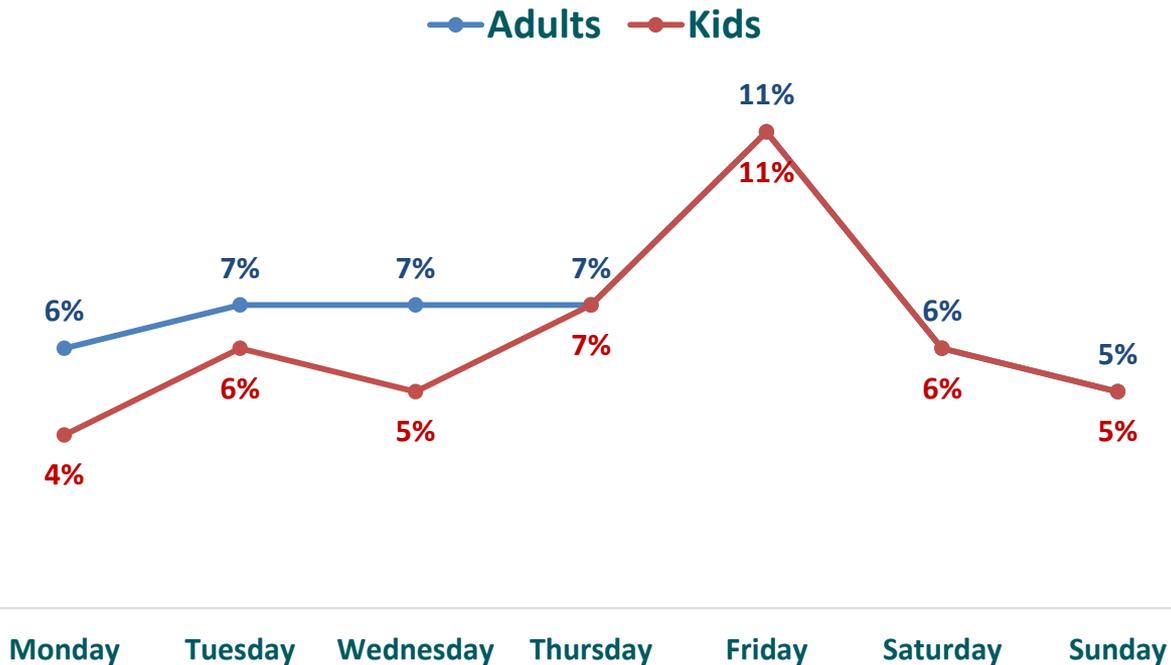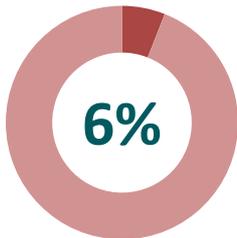
Type & Variety of Fish Used

Type of **fish** used in last 7 days

2019

- It was fresh/ plain — 51%
- It was breaded — 20%
- It was battered — 14%
- It was shaped (e.g. fish fingers, goujons) — 6%
- It was smoked — 5%
- Other — 4%

Variety of **fish** used in last 7 days

2019

- Cod — 35%
- Salmon — 29%
- Shellfish (e.g. muscles, prawns, crab) — 13%
- Haddock — 11%
- Hake — 6%
- Mackerel — 5%
- Sea bass — 3%
- Coley — 2%
- Trout — 2%
- Other — 4%

SOURCE: Evening Meal Diary Survey 2019 (n=550 fish meals)
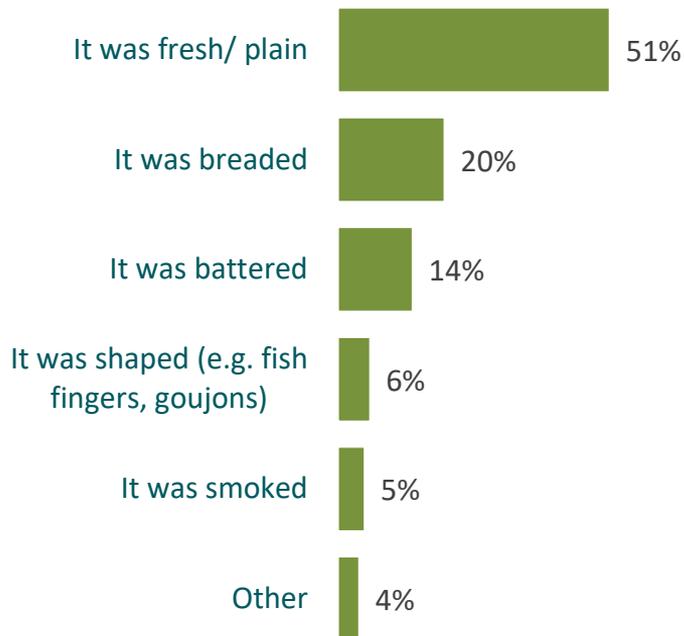
BORD BIA
Thinking House

Side of Plate Staples Review

- Potatoes
- Pasta
- Rice

Potato consumption as part of the evening meal increases with age but Pasta & Rice is the opposite among Irish adults.

Incidence of all Meals in last 7 days - Adults

POTATOES 28%

PASTA 14%

RICE 12%

Legend: POTATOES · PASTA · RICE

Age	18-24	25-34	35-44	45-54	55-64	65+
POTATOES	14%	21%	26%	33%	38%	43%
PASTA	18%	16%	14%	13%	10%	10%
RICE	16%	12%	11%	12%	11%	6%

BORD BIA
Thinking House
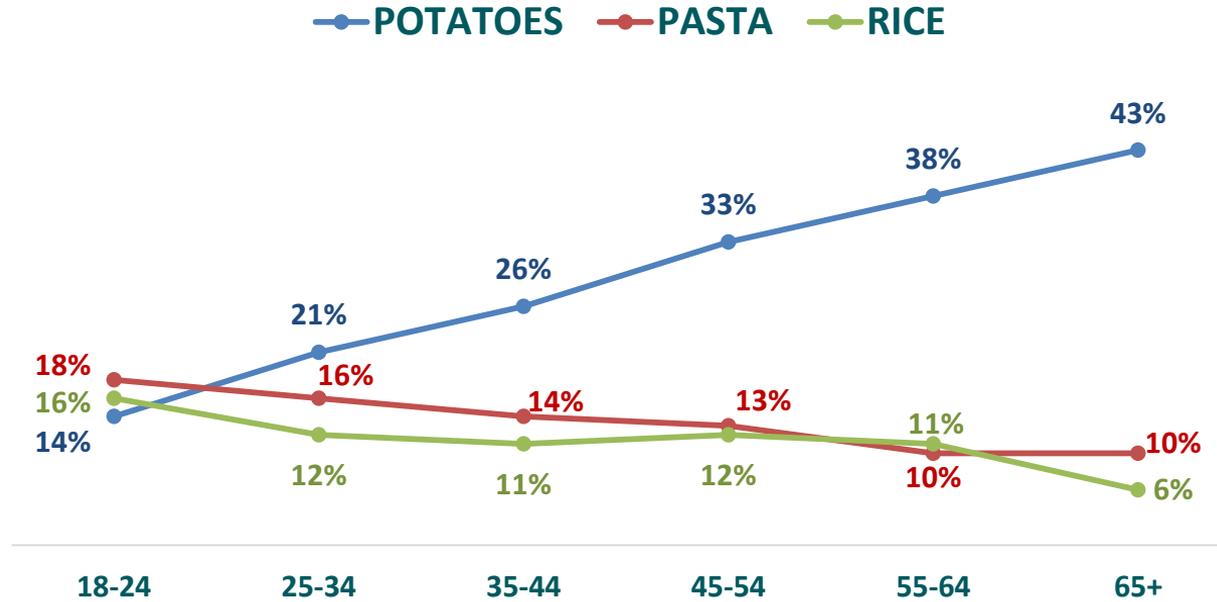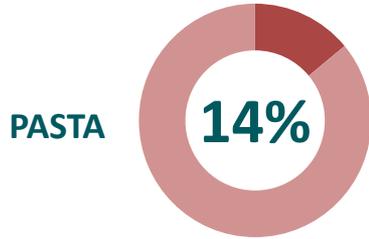
Potatoes Overview

Incidence within ALL meals in last 7 days

28%
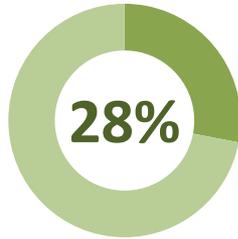
Incidence of Potato usage per day within ALL meals

30%	28%	27%	27%	22%	20%	38%
Mon	**Tues**	**Wed**	**Thurs**	**Fri**	**Sat**	**Sun**
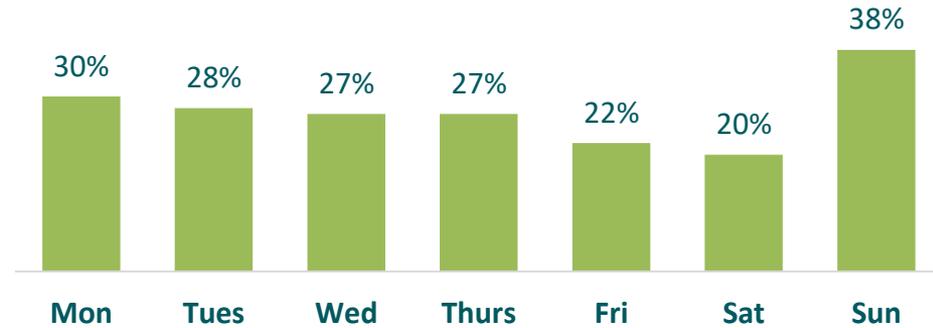
What were Potatoes consumed with? *(Top 5)*
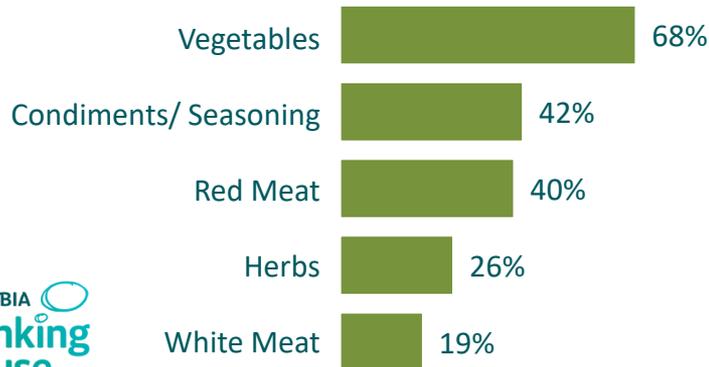
- Vegetables — 68%
- Condiments/ Seasoning — 42%
- Red Meat — 40%
- Herbs — 26%
- White Meat — 19%

Incidence within ALL meals in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
14%	21%	26%	33%	38%	43%
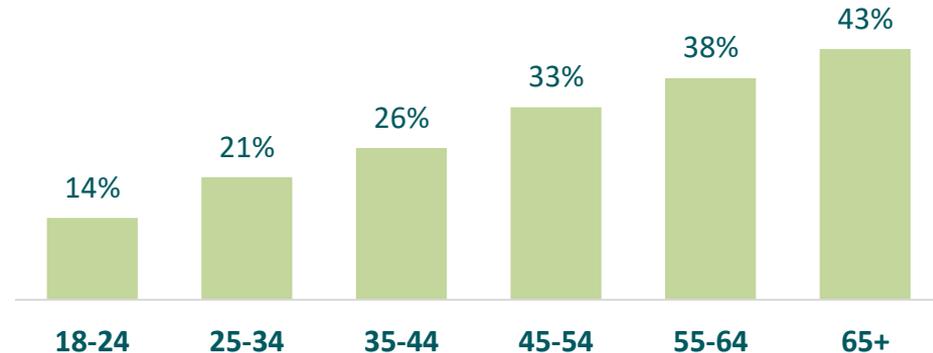
Pasta or Spaghetti Overview

Incidence within **ALL meals** in last 7 days

14%
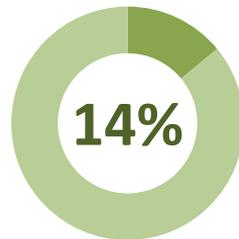
Incidence of pasta or spaghetti usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
14%	14%	17%	15%	13%	13%	10%
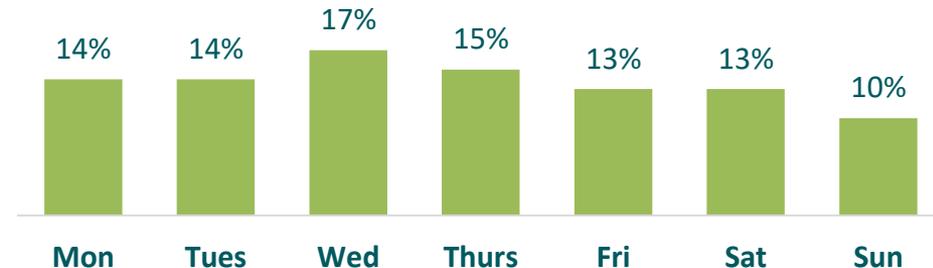
What were pasta or spaghetti consumed with? *(Top 5)*

Red meat	49%
Condiments/seasoning	43%
Fresh vegetables	39%
Cheese	36%
Oils	34%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
18%	16%	14%	13%	10%	10%

BORD BIA
Thinking House
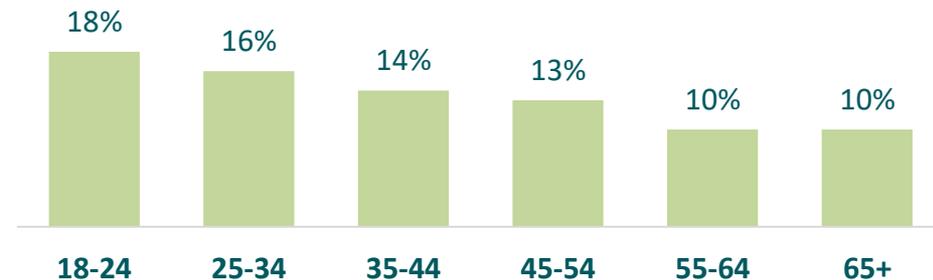
Rice Overview

Incidence within **ALL meals** in last 7 days

12%
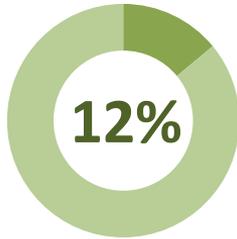
Incidence of rice usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
12%	11%	16%	12%	12%	11%	5%
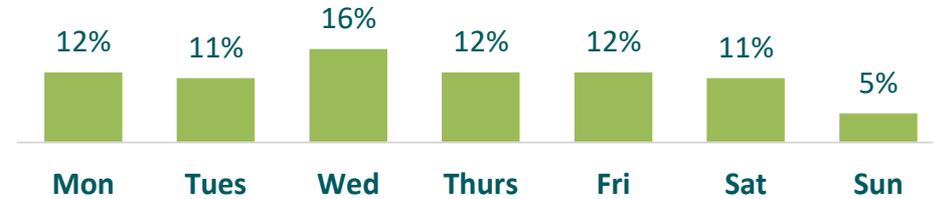
What was rice consumed with? *(Top 5)*

Fresh vegetables	53%
White Meat	44%
Condiments	44%
Oils	37%
Herbs	27%
Shoop bought sauces	19%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
16%	12%	11%	12%	11%	6%

BORD BIA
Thinking House
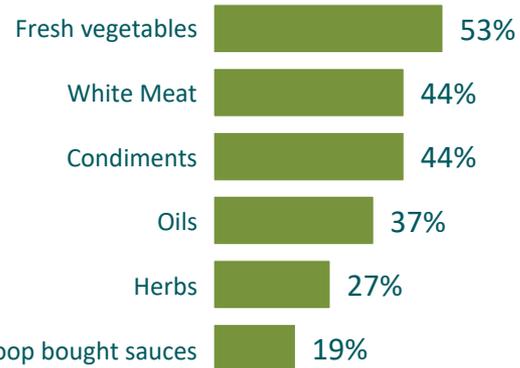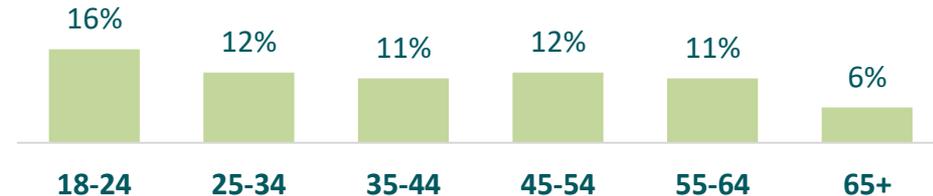
Noodles Overview

Incidence within **ALL meals** in last 7 days

4%
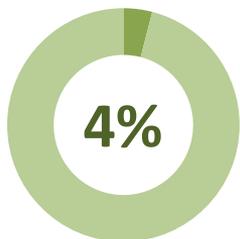
Incidence of noodles usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
3%	4%	5%	3%	4%	4%	3%

What were noodles consumed with? *(Top 5)*

Fresh vegetables	57%
White Meat	48%
Condiments	36%
Oils	27%
Herbs	21%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
4%	6%	4%	3%	2%	2%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
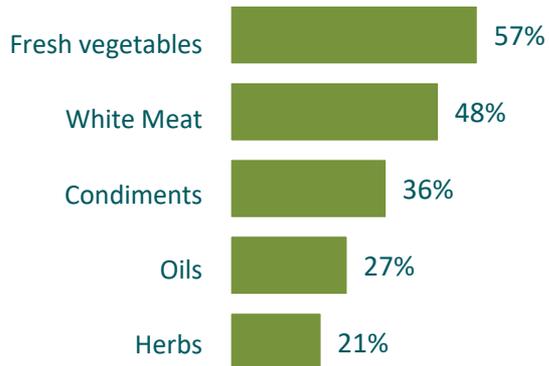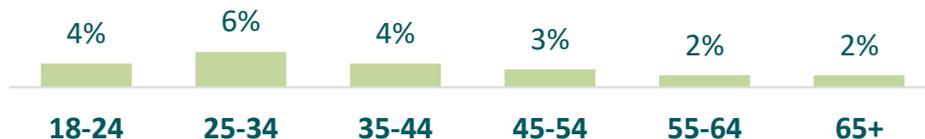
Bread Review

BORD BIA
Thinking House

Bread continues to be a major component of evening meals in Ireland especially within the growing area of Light and Egg based meals.

Incidence of all Meals in last 7 days - Adults

BREAD

28%
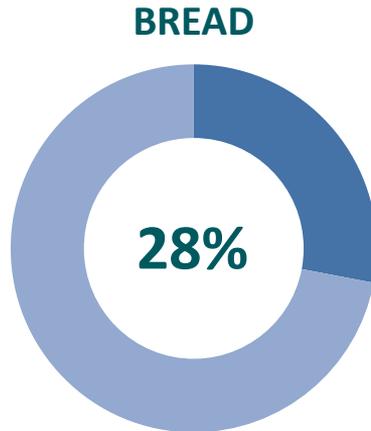
Top 5 Meal Types where Bread consumed

Within **Light Meals**	72%
Within **Egg based meals**	50%
Within an **Indian dish**	41%
Within **Salads**	37%
Within **Pasta & Sauce**	32%
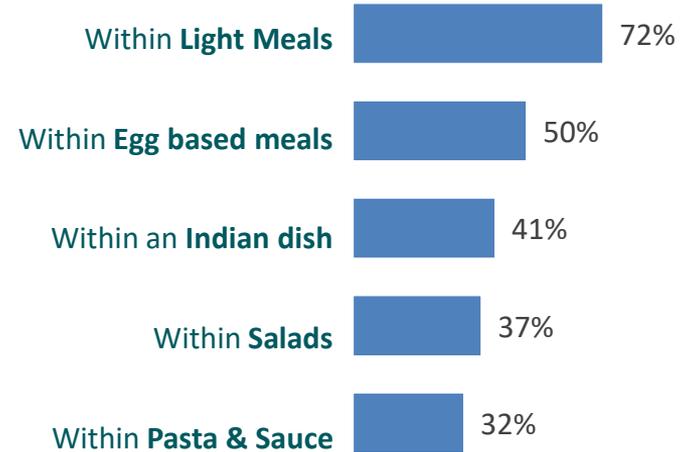
BORD BIA
Thinking House

Pizza Review

Incidence of Pizza for evening meals for both Adults and Kids is the same with consumption peaking on Fridays and Saturdays.

Incidence within **ALL meals** in last 7 days **ADULT MEALS**

6%
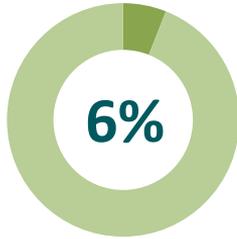
Incidence for usage **ANY day** in last 7 days **KIDS MEALS**

6%
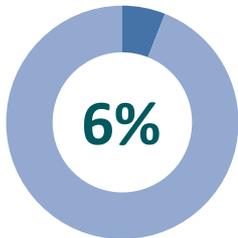
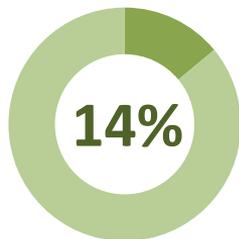Incidence of Chilled or frozen pizza usage per day within **ALL meals**

■ **Adults** ■ **Kids**

	Mon	Tues	Wed	Thurs	Fri	Sat	Sun
Adults	4%	5%	4%	4%	11%	9%	5%
Kids	5%	4%	3%	4%	11%	13%	4%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking House
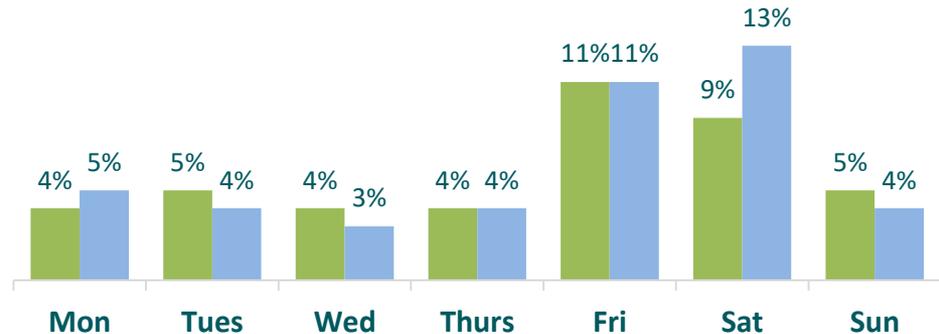
Shop Bought Sauces & Ready Meal Review

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Shop Bought Sauces Overview

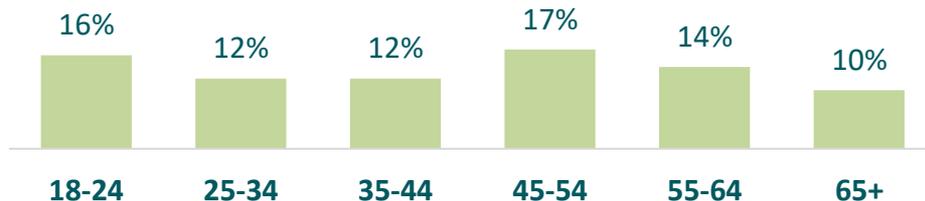## Incidence within **ALL meals** in last 7 days

14%

Incidence of Shop bought sauces usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
13%	11%	20%	13%	13%	11%	10%
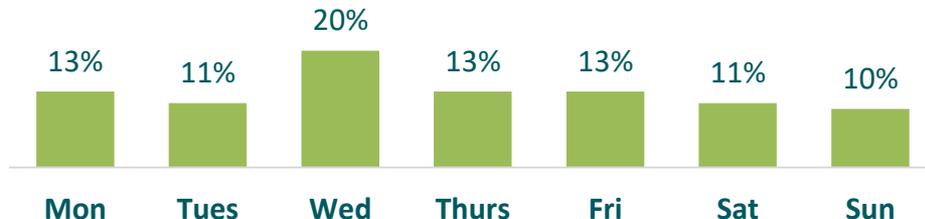
What were Shop bought consumed with? *(Top 5)*
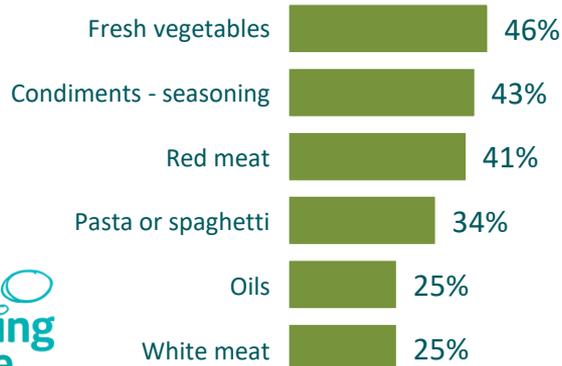
Fresh vegetables	46%
Condiments - seasoning	43%
Red meat	41%
Pasta or spaghetti	34%
Oils	25%
White meat	25%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
16%	12%	12%	17%	14%	10%

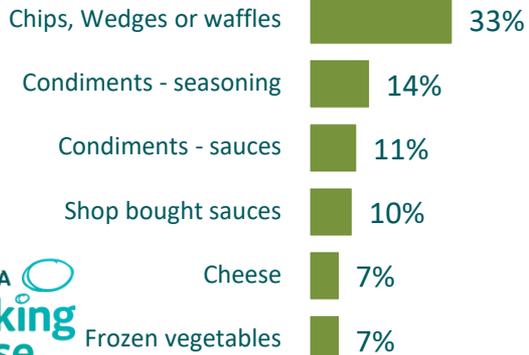BORD BIA
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Ready Meal Overview

Frozen Ready Meals

Incidence within **ALL meals** in last 7 days

1%
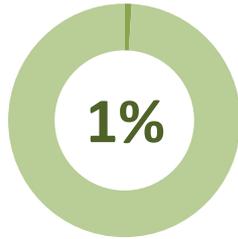
What were frozen chilled ready meals consumed with? *(Top 5)*

Chips, Wedges or waffles	33%
Condiments - seasoning	14%
Condiments - sauces	11%
Shop bought sauces	10%
Cheese	7%
Frozen vegetables	7%

Chilled Ready Meals

Incidence within **ALL meals** in last 7 days

2%
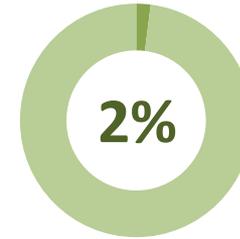
What were chilled ready meals consumed with? *(Top 5)*

Condiments - sauces	13%
Chips, wedges or waffles	11%
Cheese	11%
Condiments – seasoning	10%
Potatoes (not chips)	10%

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# Cheese & Eggs Review

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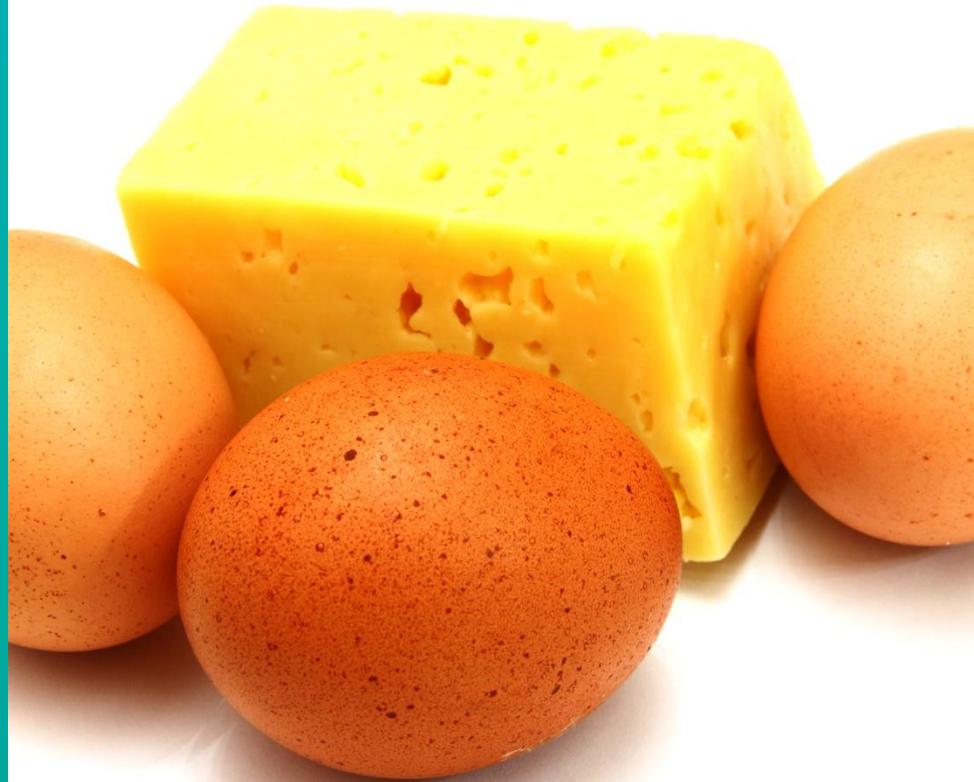
As an ingredient cheese is included in 1 in 6 evening meals in Ireland and most prevalent among younger adults.
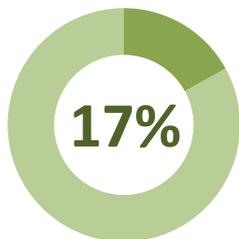

Cheese Incidence of all Meals in last 7 days

CHEESE
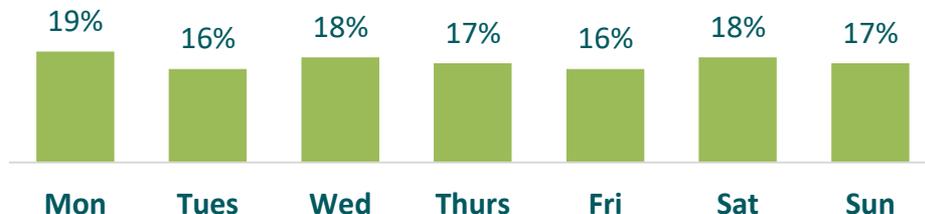
17%

Cheese Incidence of all Meals within Age Group
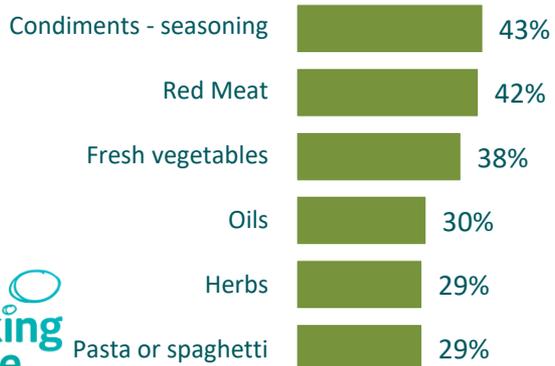
20%   19%   18%   15%   17%   9%

18-24   25-34   35-44   45-54   55-64   65+

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Thinking
House

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
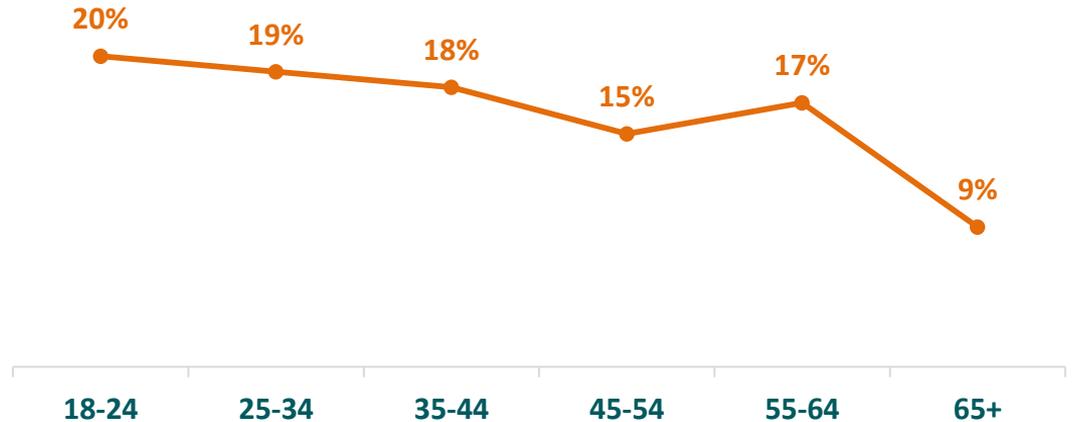
Cheese Overview

Incidence within **ALL meals** in last 7 days

17%

Incidence of cheese usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
19%	16%	18%	17%	16%	18%	17%

What were Cheeses consumed with? *(Top 5)*

Condiments - seasoning	43%
Red Meat	42%
Fresh vegetables	38%
Oils	30%
Herbs	29%
Pasta or spaghetti	29%

Incidence within **ALL meals** in last 7 days by Age Group

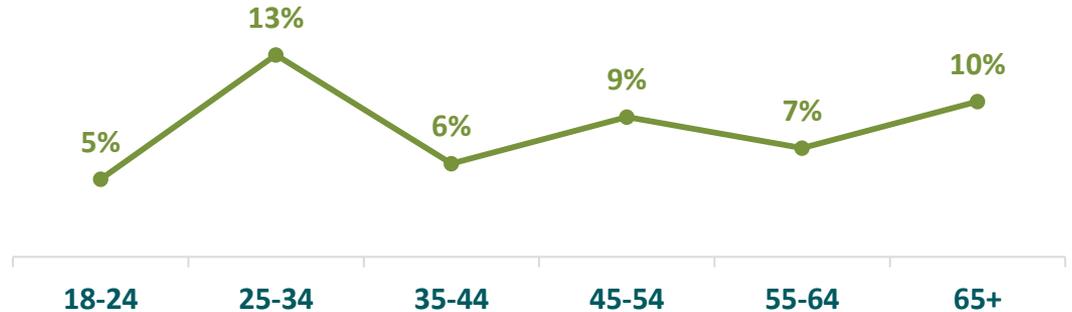| 18-24	25-34	35-44	45-54	55-64	65+
20%	19%	18%	15%	17%	9%

BORD BIA
Thinking House
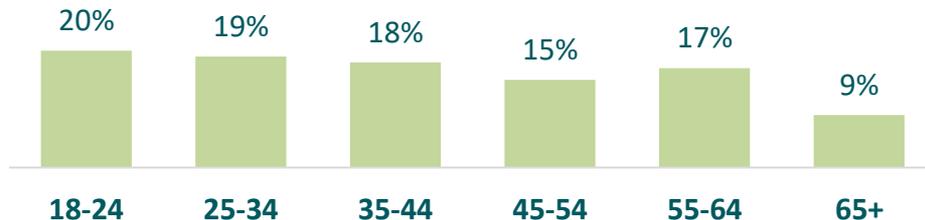
SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

Incidence of egg usage in evening meals is highest for younger adults aged 25-34 where protein uptake and convenience are key influencers.
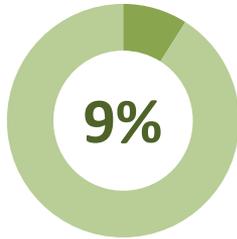
Eggs Incidence of all Meals in last 7 days

EGGS

9%

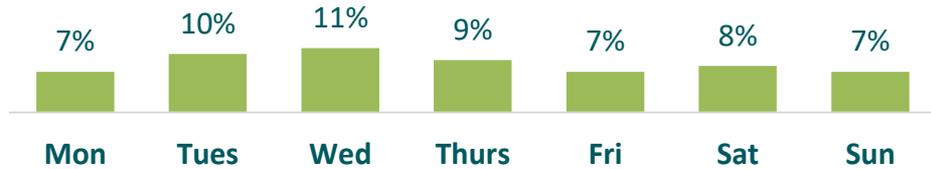Eggs Incidence of all Meals within Age Group

18-24	25-34	35-44	45-54	55-64	65+
5%	13%	6%	9%	7%	10%

BORD BIA
Thinking
House
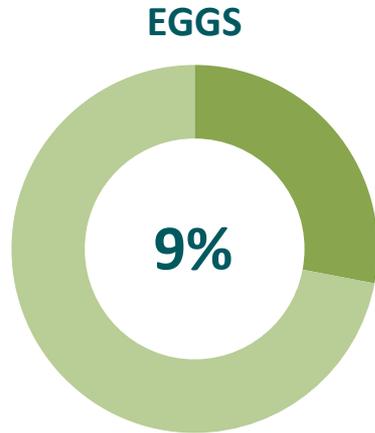
Eggs Overview

Incidence within **ALL meals** in last 7 days

9%

Incidence of egg usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
7%	10%	11%	9%	7%	8%	7%

What were Eggs consumed with? *(Top 5)*

Condiments - seasoning	40%
Red Meat	31%
Oils	31%
Cheese	29%
Fresh vegetables	28%
Bread	28%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
5%	13%	6%	9%	7%	10%
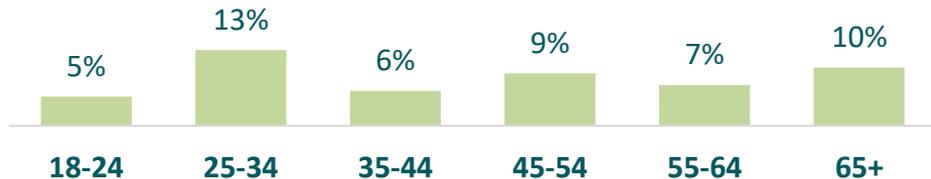
SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
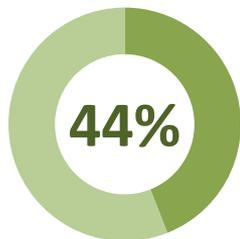
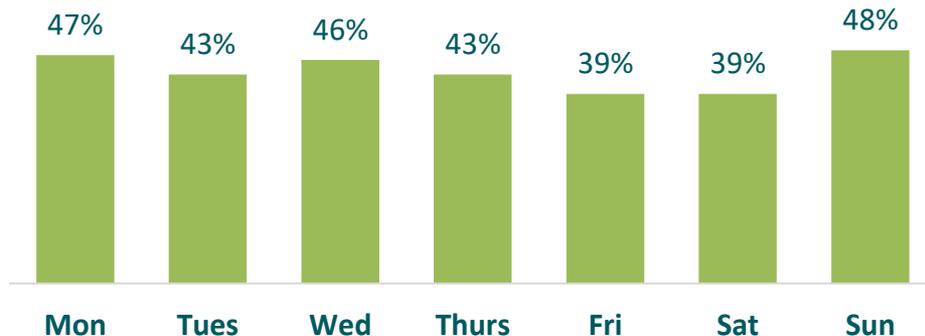# Vegetables Review
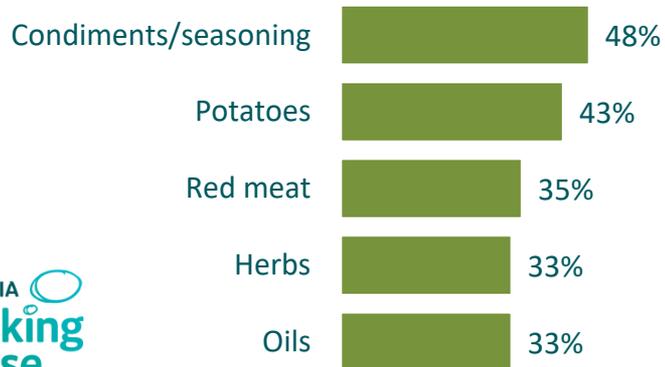
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Thinking House

Fresh Vegetables Overview

Incidence within **ALL meals** in last 7 days

44%

Incidence of Fresh Vegetables usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
47%	43%	46%	43%	39%	39%	48%

What were Fresh Vegetables consumed with? *(Top 5)*

- Condiments/seasoning — 48%
- Potatoes — 43%
- Red meat — 35%
- Herbs — 33%
- Oils — 33%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
38%	37%	42%	49%	49%	55%

BORD BIA
Thinking House
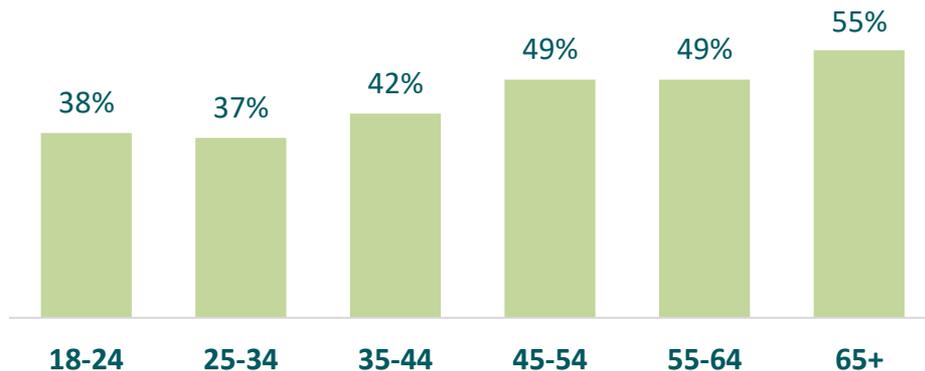
Frozen Vegetables Overview

Incidence within **ALL meals** in last 7 days

11%
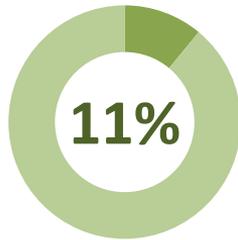
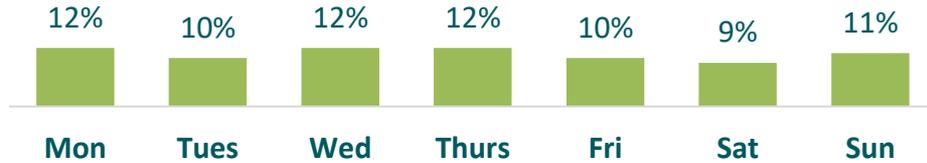## Incidence of Frozen Vegetables usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
12%	10%	12%	12%	10%	9%	11%

What were Frozen Vegetables consumed with? *(Top 5)*
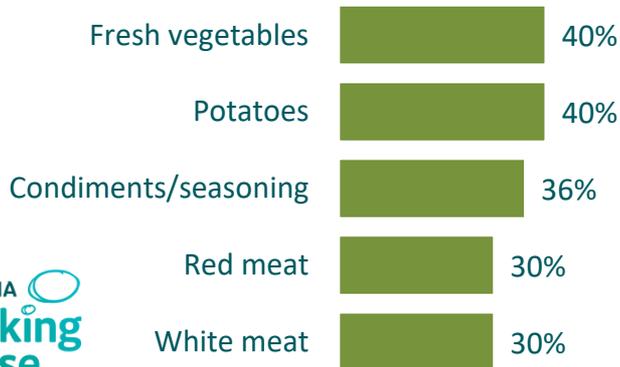
- Fresh vegetables — 40%
- Potatoes — 40%
- Condiments/seasoning — 36%
- Red meat — 30%
- White meat — 30%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
8%	10%	12%	13%	10%	11%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

BORD BIA
Thinking House
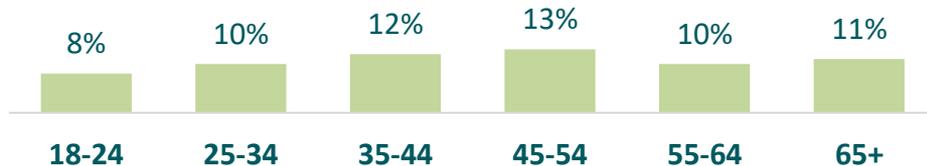
Tinned Vegetables Overview

Incidence within ALL meals in last 7 days

6%
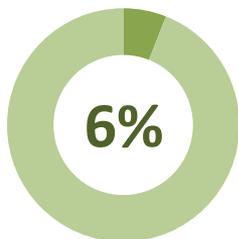
Incidence of Tinned Vegetables usage per day within ALL meals

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
8%	6%	7%	6%	6%	5%	5%
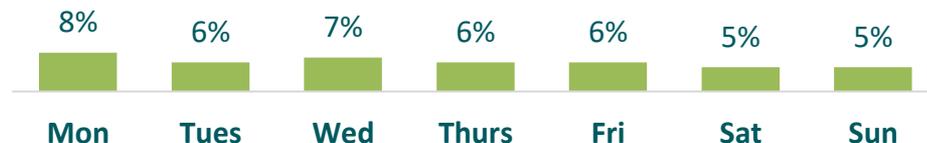
What were Tinned Vegetables consumed with? *(Top 5)*

Condiments/seasoning	49%
Fresh vegetables	40%
Red meat	39%
Oils	28%
Herbs	27%
Potatoes	27%

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
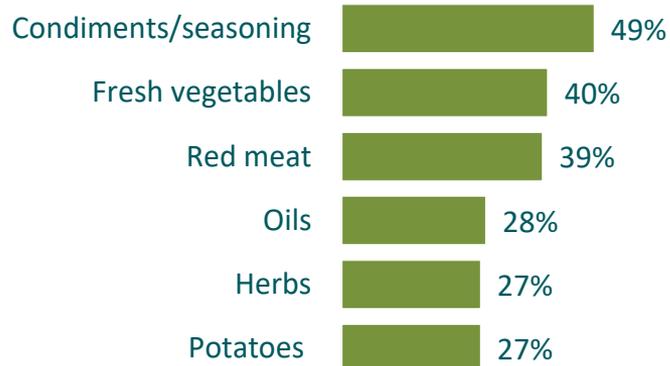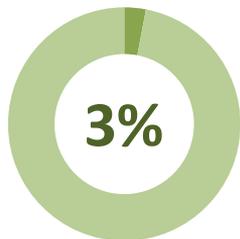
Salad Review

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Bagged Salads Overview

Incidence within **ALL meals** in last 7 days

3%

Incidence of Bagged Salad usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
4%	4%	3%	3%	4%	4%	2%

What were bagged salads consumed with? *(Top 5)*
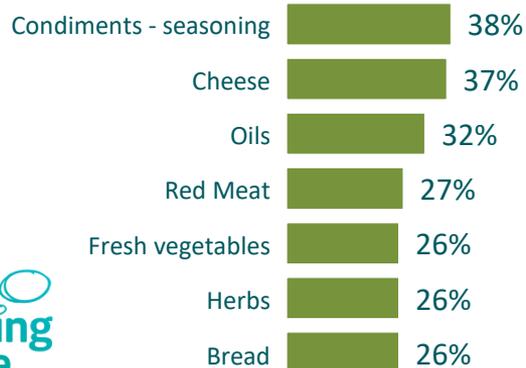
Condiments - seasoning	38%
Cheese	37%
Oils	32%
Red Meat	27%
Fresh vegetables	26%
Herbs	26%
Bread	26%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
4%	3%	3%	4%	4%	2%

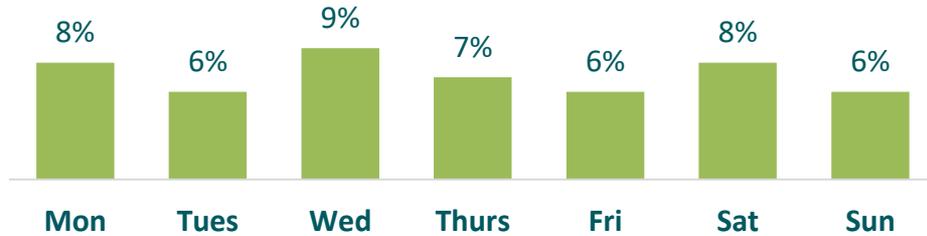**BORD BIA**
Thinking House
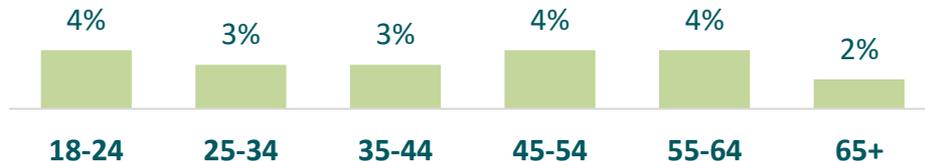
SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

Fresh Salad Leaves Overview
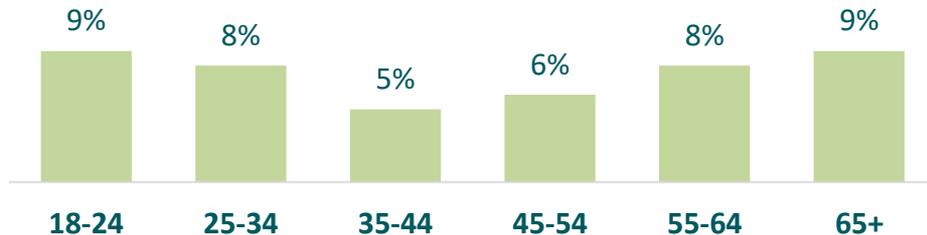
Incidence within **ALL meals** in last 7 days

7%
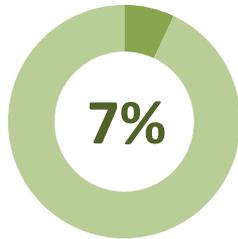
Incidence of Salad Leaves usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
8%	6%	9%	7%	6%	8%	6%

What were fresh salad leaves consumed with? *(Top 5)*
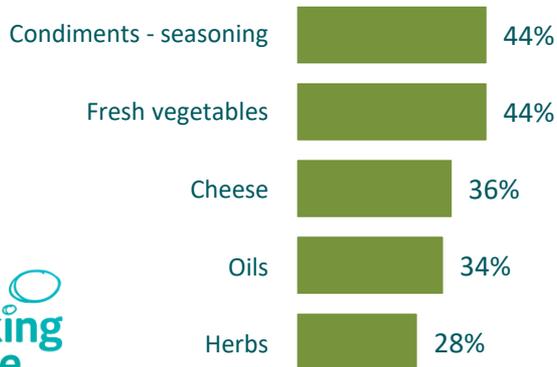
Condiments - seasoning	44%
Fresh vegetables	44%
Cheese	36%
Oils	34%
Herbs	28%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
9%	8%	5%	6%	8%	9%

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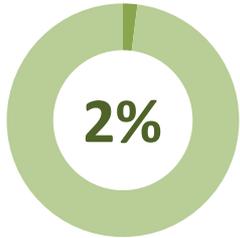*SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)*

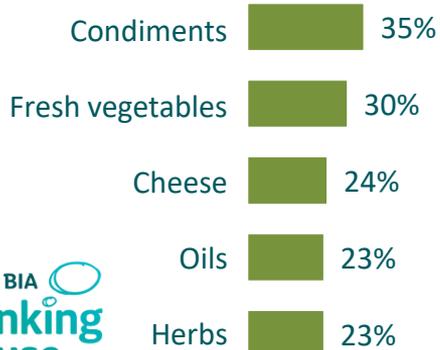# Fruit, Seeds/ Nuts, Oils, Pulses & Herbs Review

BORD BIA
Thinking House
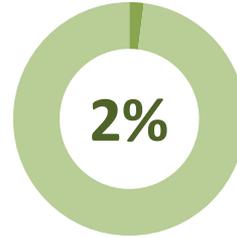
Fruit

Incidence within **ALL meals** in last 7 days

2%

What were fruits consumed with? *(Top 5)*

Condiments	35%
Fresh vegetables	30%
Cheese	24%
Oils	23%
Herbs	23%

Seeds/ Nuts

Incidence within **ALL meals** in last 7 days

2%

What were Seeds/Nuts consumed with? *(Top 5)*

Fresh vegetables	66%
Herbs	50%
Condiments	46%
Oils	41%
Fresh salad leaves	38%
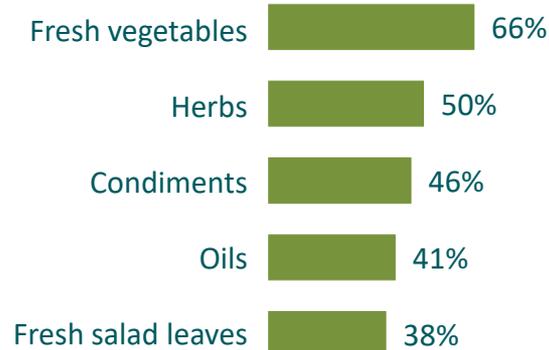
Herbs

Incidence within **ALL meals** in last 7 days

21%
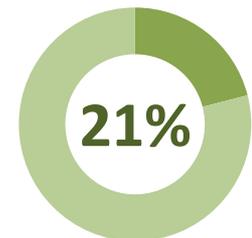
What were Herbs consumed with? *(Top 5)*

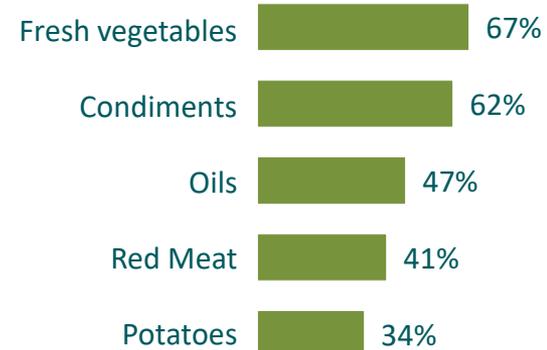|	
Fresh vegetables	67%
Condiments	62%
Oils	47%
Red Meat	41%
Potatoes	34%

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Oils Overview

23%
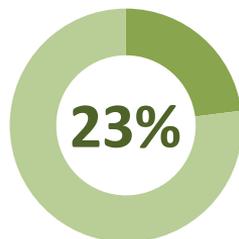
Incidence of Oils usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
21%	22%	27%	22%	23%	21%	19%
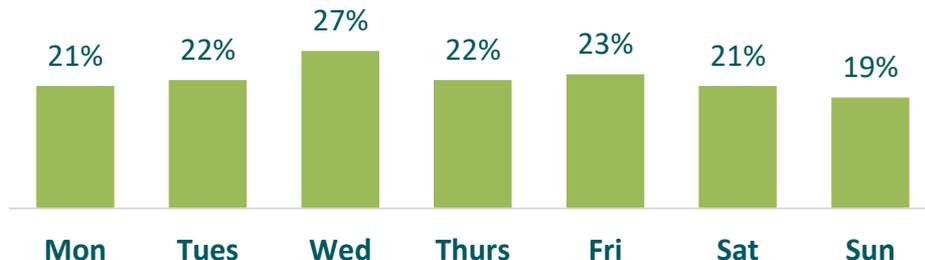
What were the oils consumed with? *(Top 5)*

Fresh vegetables	64%
Condiments - seasoning	62%
Herbs	45%
Red meat	37%
Potatoes	26%
White meat	26%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
22%	20%	22%	24%	25%	25%

BORD BIA
Thinking House

SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
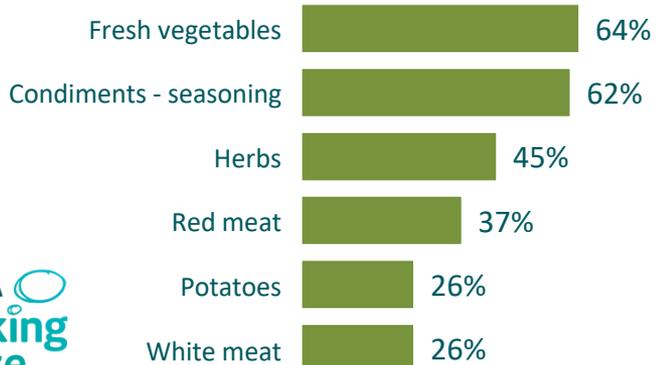
Pulses Overview

Incidence within **ALL meals** in last 7 days

5%
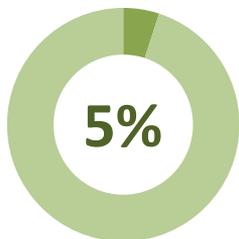
Incidence of Pulses usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
5%	6%	6%	4%	5%	4%	3%

What were Pulses consumed with? *(Top 5)*
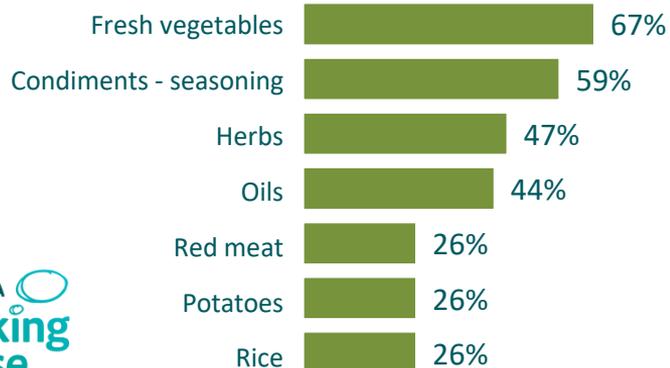
Fresh vegetables	67%
Condiments - seasoning	59%
Herbs	47%
Oils	44%
Red meat	26%
Potatoes	26%
Rice	26%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
8%	5%	5%	3%	3%	7%
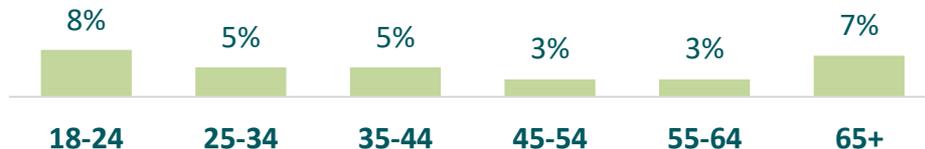
SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
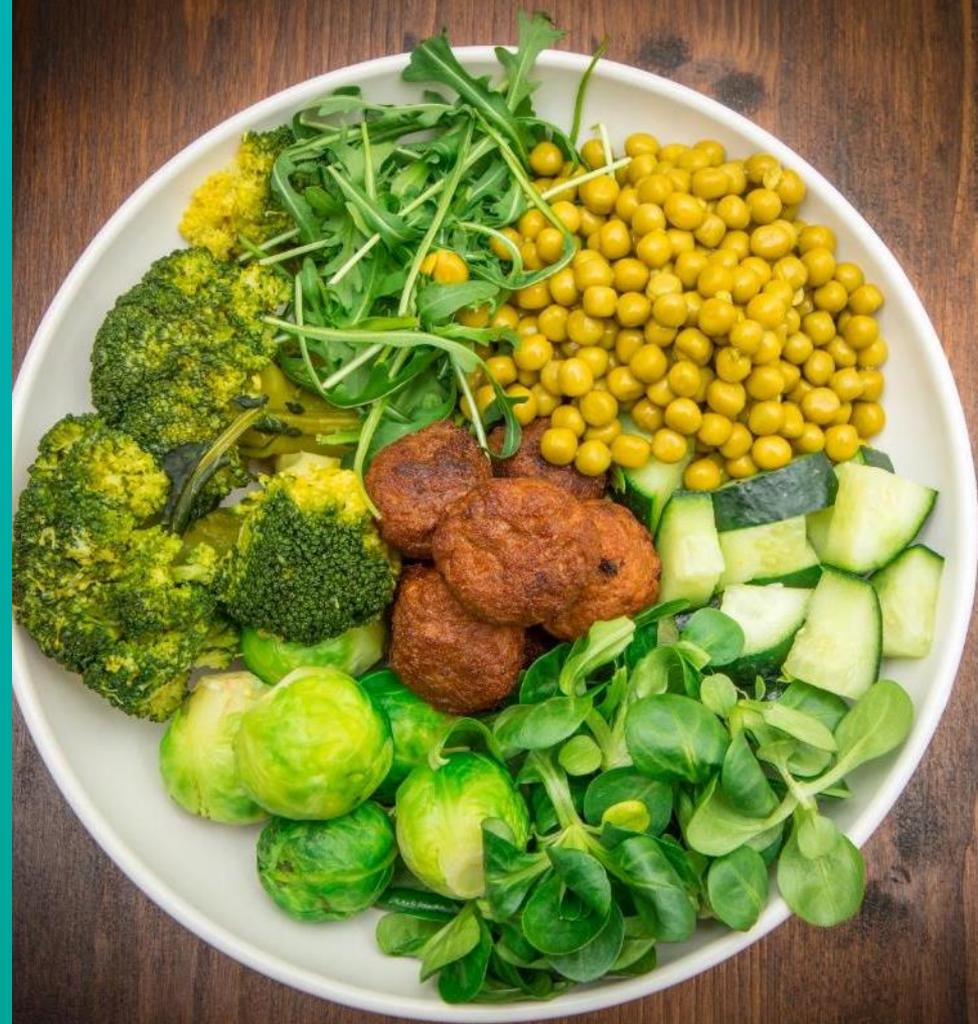
Meat Free Substitute Overview

Incidence within **ALL meals** in last 7 days

2%
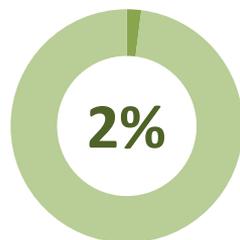
Incidence of Meat free usage per day within **ALL meals**

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
2%	2%	1%	1%	2%	1%	1%
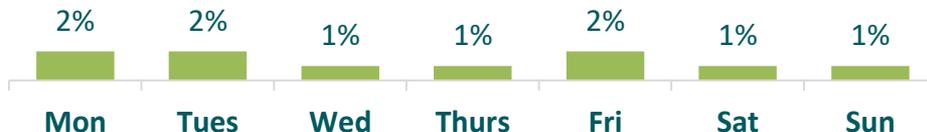
What were the Meat free substitutes consumed with? *(Top 5)*
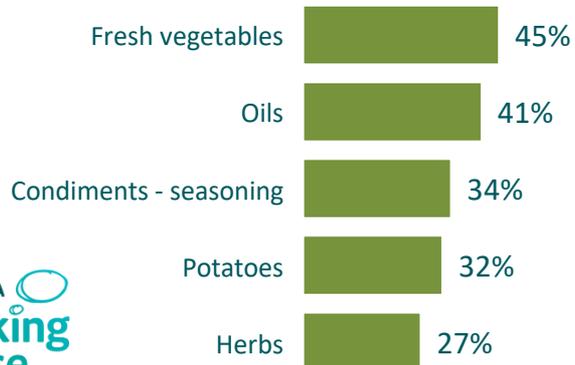
Fresh vegetables	45%
Oils	41%
Condiments - seasoning	34%
Potatoes	32%
Herbs	27%

Incidence within **ALL meals** in last 7 days by Age Group

18-24	25-34	35-44	45-54	55-64	65+
4%	2%	1%	1%	1%	1%
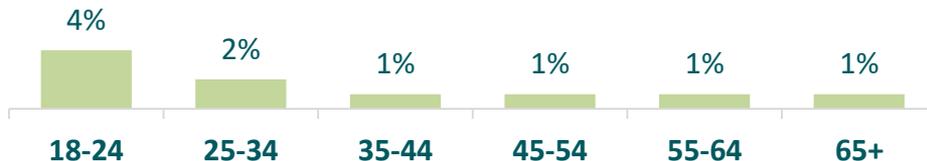
SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)

Vegan Overview

Incidence within **ALL meals** in last 7 days

1%
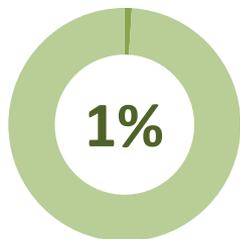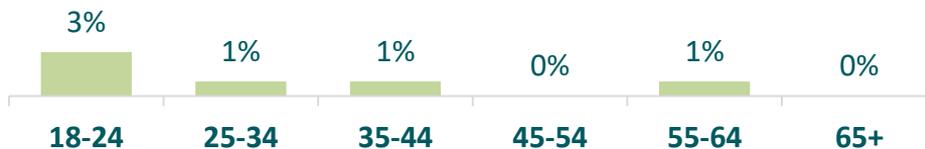
What were the Vegan specific components consumed with? *(Top 5)*

Component	Percentage
Fresh vegetables	45%
Pulses	32%
Condiments - seasoning	28%
Rice	23%
Meat free substitute	22%

Incidence within **ALL meals** in last 7 days by Age Group

Age Group	Percentage
18-24	3%
25-34	1%
35-44	1%
45-54	0%
55-64	1%
65+	0%

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SOURCE: Evening Meal Diary Survey 2019 (n=7,866 total meals)
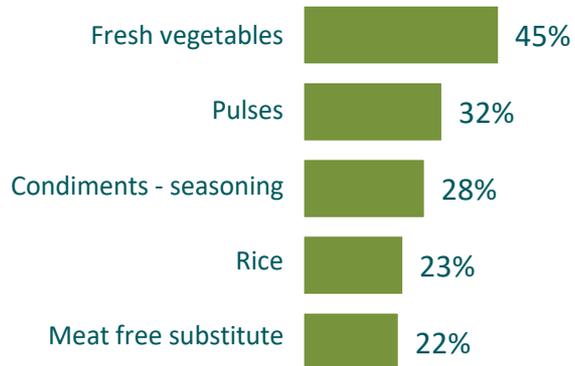
APPENDIX

APPENDIX 1

Evening Meal Type Review

Formal Evening Meal Overview

Penetration of all evening meals

5%
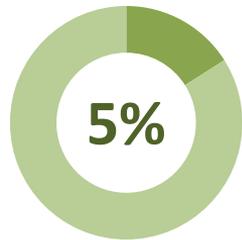
Weekday	Weekend
4%	9%

Profile Bullseye
/ Under 35's of higher social grade
/ 9 people on average in attendance

Location
/ 47% outside of home
(restaurant, pub, diner, work, on the go)
/ 49% at home/someone else's home

Out of home experience

/ **84%** at full service restaurant

Meal types consumed - Top 3		
1	Classic carvery	29%
2	Italian *(not pizza)*	13%
3	Chinese	8%

At home/someone else's home

Top 5 dish types		
1	Classic meat & 2 veg	17%
2	Salads	12%
3	Chicken dish	11%
4	Italian foods	11%
5	Pasta with sauce	10%

Adult drinks included with meal		
1	Wine	42%
2	Tap water	41%
3	Beer	32%
4	Soft drink	25%

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Smaller Meal Overview

Penetration of all evening meals

9%
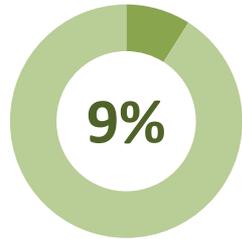
Weekday	Weekend
9%	11%

Profile Bullseye

/ Family life-stages; social grade C1

/ 2.6 people on average in attendance

Location

/ 88% at home/someone else's home

/ 12% outside of home
(restaurant, pub, diner, work, on the go)

Out of home experience

/ **52%** at Fast Casual/ Quick Service

Meal types consumed - Top 3	
1 Casual food	18%
2 Light meal	14%
3 Fish & chips	14%

At home/someone else's home

Top 5 dish types	
1 Light meal	30%
2 Egg based dish	11%
3 Italian foods	8%
4 Salads	6%
5 Diner-style favourites	6%

Adult drinks included with meal	
1 Tap water	32%
2 Traditional/herbal tea	27%
3 Bottled water	13%
4 Soft drink	13%

SOURCE: Evening Meal Diary Survey 2019 (n=6,114 meals)

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Snack Overview

Penetration of all evening meals

5%
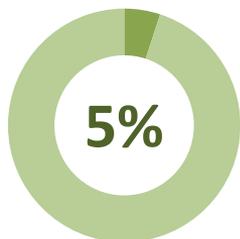
Weekday	Weekend
5%	5%

Profile Bullseye

/ Single under 35's with no kids and social grade C1

/ 1.8 people on average in attendance

Location

/ 83% at home/someone else's home

/ 12% at work or on the go (car/walking)

/ 4% outside of home (restaurant, pub, diner)

Out of home experience

/ **41%** Quick Service Restaurant

/ **33%** Food-to-Go / Forecourt

Meal types consumed - Top 2

1	Sandwich	29%
2	Light meal	26%

At home/someone else's home

Top 5 dish types

1	Light meal	40%
2	Italian foods	6%
3	Salads	6%
4	Diner-style favourites	5%
5	Ready Meal	5%

Adult drinks included with meal

1	Tap water	22%
2	Fruit/herbal tea	21%
3	Soft drink	16%
4	No drink	10%

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Thinking House

On-The-Go Overview

Penetration of all evening meals

3%
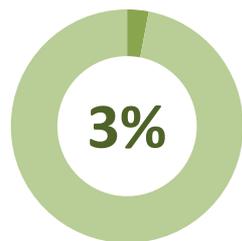
Weekday	Weekend
3%	4%

Profile Bullseye

/ Single under 35's, renting or living with parents and of social grades C1 &DE

/ 2.8 people on average in attendance

Location

/ 43% at home/someone else's home

/ 30% outside of home
(restaurant, pub, diner, work, on the go)

/ 25% at work or on the go (car/walking)

Out of home experience

/ **48%** Quick Service
/ **14%** Food-to-Go
/ **13%** Fast Casual

Meal types consumed - Top 3

1	Fast Food	25%
2	Burger & chips	15%
3	Light meal	14%

At home/someone else's home

Top 5 dish types		
1	Light meal	19%
2	Chicken dish	11%
3	Chinese/Oriental	11%
4	Italian foods	10%
5	Diner-style favourites	10%

Adult drinks included with meal		
1	Soft drink	33%
2	Tap water	22%
3	Bottled water	14%
4	No drink	10%

SOURCE: Evening Meal Diary Survey 2019 (n=6,114 meals)

APPENDIX 2

Out of Home Evening Meal Review

Unsurprisingly, eating out of home is higher on the weekends – with 1 in 8 of all Evening Meals on a Friday and Saturday consumed out of home.

Penetration of all evening meals in last 7 days
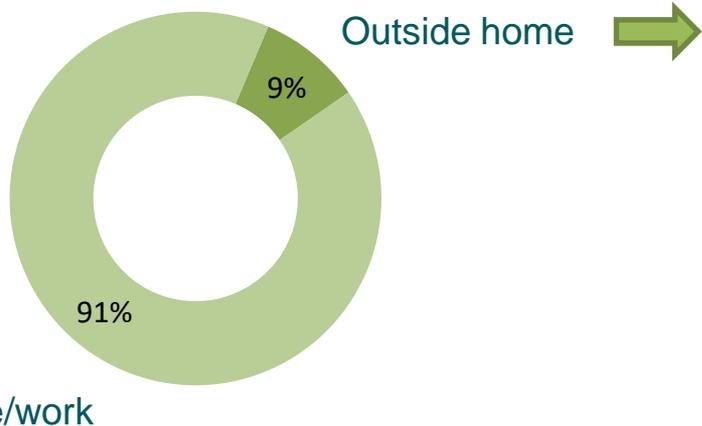
Penetration across each day of the week

Outside home

9%

At home/work

91%

Mon	Tues	Wed	Thurs	Fri	Sat	Sun
6%	5%	5%	7%	12%	12%	10%

BORD BIA
Thinking House
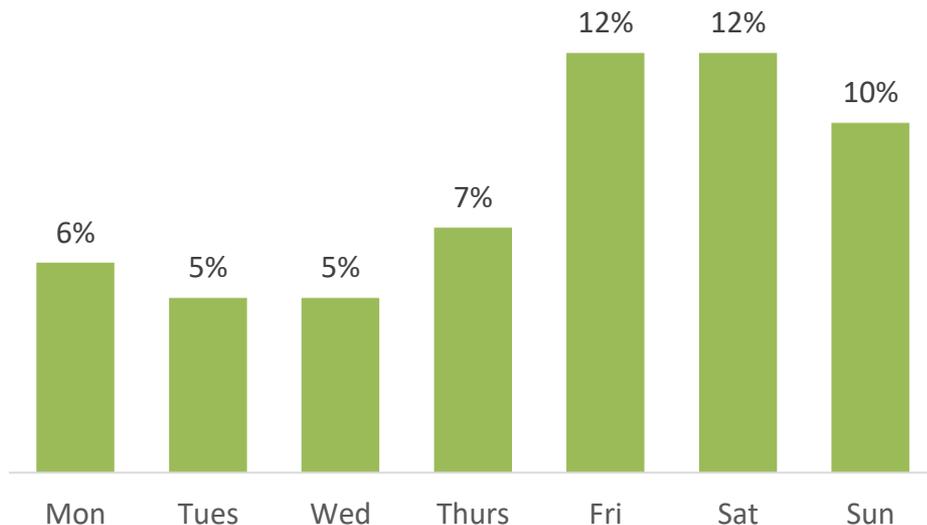
A 'treat night' and 'quick meal on the go' dominate the nature of out of home Evening Meal Occasion.

Occasion	Percentage
A treat night/ evening meal	30%
A quick meal grabbed on the go	25%
A dinner party/ special occasion	14%
A pretty regular, routine evening meal	10%
A casual meal with a few guests	6%
A pretty regular family meal	4%
A quiet relaxing dinner alone or with a partner / housemate / friend / family member	4%
A romantic evening meal	4%
Other	2%

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Thinking House
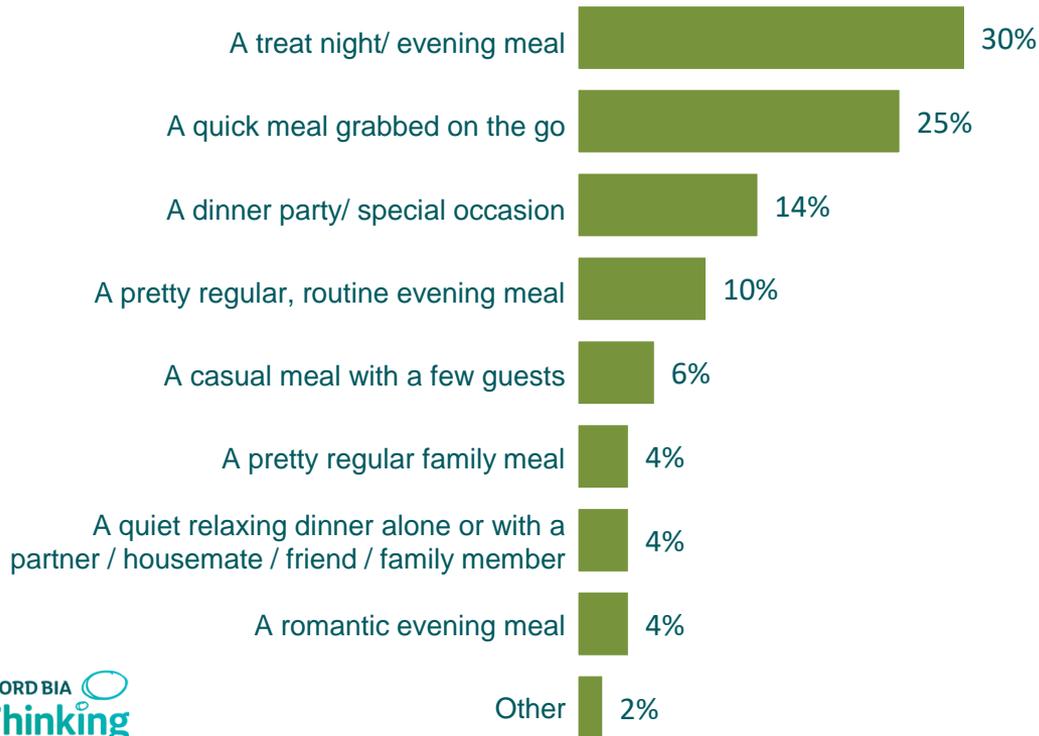
Full Service, Quick Service and Fast Casual Restaurants dominate the out of home Evening Meal footprint.

Establishment Used

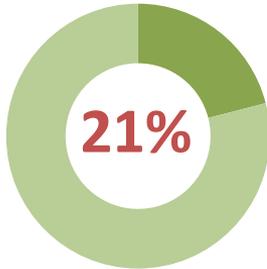| Full Service Restaurant	Quick Service Restaurants	Fast Casual Restaurant	Food-to-Go outlet	Forecourt Convenience outlet
50%	**21%**	**15%**	**4%**	**3%**

Nature of Food

Full Service Restaurant

1.	Classic Carvery/dinner	29%
2.	Other Italian (e.g. pasta, spaghetti)	10%
3.	Casual Food (e.g. burgers)	9%
4.	Pizza	7%
5.	Indian Food	6%

Quick Service Restaurants

1.	Fast Food (e.g.McDonald's)	47%
2.	Burger & Chips	26%
3.	Casual food (e.g.burgers)	11%
4.	Fish & Chips	9%
5.	Chinese Food	6%

Fast Casual Restaurant

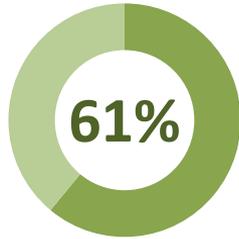| 1.	Casual food (e.g.burgers)	25%
2.	Burger & Chips	20%
3.	Classic Carvery/dinner	14%
4.	Pizza	11%
5.	Light Meal/Thai/Other oriental	6%
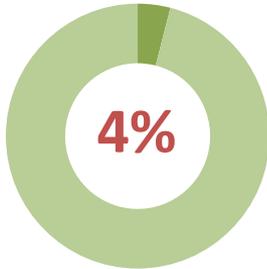
*Base size too small to show

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APPENDIX 3

At Home Evening Meal Occasion Review

Regular Routine Evening Meal Occasion – Overview

Penetration of all evening meals

61%

Weekday	Weekend
65%	51%

Top 5 dish types consumed	
1 Classic meat & 2 veg	10%
2 Chicken dish	10%
3 Pasta with sauce	10%
4 Diner-style favourites	9%
5 Italian foods	8%

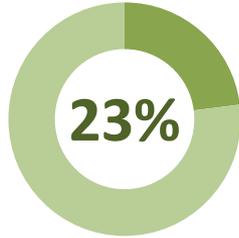| Key facts! |
|---|
| / 2.5 people in attendance on average |
| / 35% watched TV |
| / 18% were on mobile phone |
| / 24% had no device on |
| *Average time consumed between 6-7 pm* |

Top 3 drinks consumed	
1 Tap water	38%
2 Soft drinks	15%
3 Tea (Traditional or herbal)	15%

SOURCE: Evening Meal Diary Survey 2019 (n=5,353 adult meals at home)

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Regular Family Meal – Overview

Penetration of all evening meals

23%

Weekday	Weekend
22%	27%

Key facts!

/ 4.4 people in attendance on average

/ 24% watched TV

/ 39% had no device on

Average time consumed between 6-7 pm

Top 5 dish types consumed

1	Classic meat & 2 veg	17%
2	Chicken dish	14%
3	Pasta with sauce	12%
4	Diner-style favourites	9%
5	Italian / Fish dish / Stew	8%

Top 3 drinks consumed

1	Tap water	41%
2	Bottled water	17%
3	Soft drinks	16%

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Thinking House

Treat Night– Overview

Penetration of all evening meals

7%
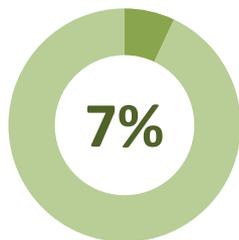
Weekday	Weekend
6%	11%

Key facts!
╱ 3.1 people in attendance on average
╱ 51% watched TV
╱ 18% were on mobile phone
╱ 9% were on tablet or laptop
╱ 16% had no device on
Average time consumed between 7-8 pm

Top 5 dish types consumed		
1	Italian foods	25%
2	Chinese/Oriental	23%
3	Diner-style favourites	17%
4	Chicken dish	6%
5	Fish dish	6%

Top 3 drinks consumed		
1	Soft drinks	41%
2	Tap water	26%
3	Bottled water	16%

SOURCE: Evening Meal Diary Survey 2019 (n=5,353 adult meals at home)

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Thinking
House

Relaxing Alone or With Partner – Overview

Penetration of all evening meals

4%
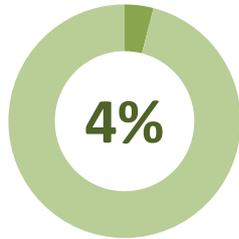
	Weekday	Weekend
	4%	6%

Key facts!
/ 2 people in attendance on average
/ 35% watched TV
/ 25% were on mobile phone
/ 15% were on tablet or laptop
/ 22% had no device on
Average time consumed between 7-8 pm

Top 5 dish types consumed		
1	Italian foods	12%
2	Light meal	12%
3	Diner-style favourites	8%
4	Chicken dish	8%
5	Indian dish	7%

Top 3 drinks consumed		
1	Tap water	33%
2	Tea (Traditional or herbal)	19%
3	Soft drinks	15%

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Thinking House

THANK YOU

BORD BIA

Thinking House