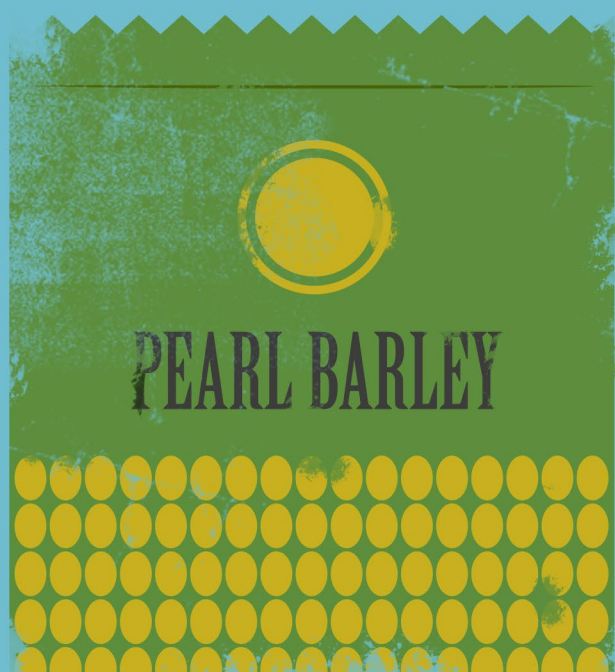




The 2017 UK Food and Drink Report




1 the trouble with **bubbles**

The **Bray Leino** 2017 UK Food and Drink Report
Compiled in conjunction with MindMover Consumer Insight and Experian

Ours, it seems,
is a nation divided.
North/South.
Rural/metropolitan.
Leave/remain.
London/everywhere
else. In these
polarized times,
predicting the moods
and behaviours of a
nation has become a
more complex task.

This shouldn't surprise us. Psychology, as much as technology, ensures we all live in bubbles created from our assumptions, environments, experiences and prejudices. We are drawn to the people, places, products and ideas that confirm our own beliefs. And that truth is as hazardous for marketers as it is for pollsters and politicians. If the last few years has taught us anything, it's that extrapolating national insights from regional snapshots is a dangerous game.

The Bray Leino 2017 UK Food and Drink Report has been commissioned, a year into the Brexit process, to help food and drink brand-builders, retailers and marketers navigate through the UK's regional attitudes, understand how and where consumers diverge and gauge how prevalent apparent trends really are.



May and June 2017
600 online interviews;
200 each in London, Wales
and North East England.
The demographics were
representative of each area.

In particular, we sought contrasts
between the remain-voting
metropolitan hub and two regions
where Brexit was strongly supported.
We invite anyone with an interest
in building food and drinks brands
to use the results to guide their
marketing activities into 2018
and beyond.



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the trouble with **bubbles** the Capital



London is often the epicentre of new food trends and movements so we expected Londoners to be more familiar with fashionable foods and the data didn't disappoint.

Londoners were significantly more likely to have tried spirulina, coconut oil, flax seeds, chia seeds, cacao nibs, green tea and coconut water than consumers in Wales and the North East.

Londoners were more likely to claim they eat healthily and government statistics show that London has the lowest obesity rates in the country (though still 59% are overweight or obese) but it's not all clean living and healthy lifestyles. The results of our survey suggest they do love their junk food too.

London respondents were significantly more likely than those in Wales and the North East to say they eat **fast food takeaways** at least 2-3 times a week. London also leads when it comes to **ready meals**, with 9% claiming to eat a ready meal at least once a day and nearly 1 in 4 saying they eat ready meals 4-6 times a week or more.

The huge choice of food and cuisines available and its easy accessibility means Londoners are spoilt for choice and temptation is never far away. Whether they want the latest superfood, a microwave meal or pizza and chips, consumers in London don't have to work very hard to get them and quite a lot is only a call or tap away from being brought to their front door. It's quite a different story if you're living in a small town or village in Wales or the North East.

the trouble with **bubbles** **Brexit and** **Britishness**

As mentioned in the introduction to our Report, last year's Brexit vote and the divisions it revealed about the nation were a catalyst for our research. Whilst differences in our appetite for foodstuffs might not be as important as differences in our attitudes to the European Human Rights Act, they can be revealing and would help get under the skin of a supposedly divided nation.

One interesting aspect to the Brexit vote is that both sides of the debate felt that they were voting in Britain's best interests.

Remainers wanted to be part of the EU because they believed it was best for Britains' interests, just as Brexit voters felt the same about leaving. Despite some of the rhetoric, one side wasn't more patriotic than the other and this universal sense of patriotism came through in the research results. The desire to **buy British** was very strong with 63% saying they were very or somewhat concerned with buying British and there were no significant differences geographically.

Multi-cultural, remain-voting Londoners were as likely to be concerned with Britishness as leave-voting strongholds of Wales and the North East.



the trouble with **bubbles** health issues

4



63%

of UK adults
are classified as
overweight



67%

claim their diet
is healthy

The UK's obesity crisis is well documented. Official UK government figures state that 27% of UK adults are obese, a further 36% are overweight and that obesity is highest in the North East. As this means 63% of UK adults are classified as overweight or obese, we were surprised to see that two-thirds of the respondents overall claimed their diet was very (12%) or fairly (55%) healthy, with only 8% agreeing their diet was unhealthy. Respondents from social class A were significantly more likely to claim they had a very healthy diet.

There is a significant disconnection between people's self-reported perceptions and the reality of their eating habits. This supports studies that show most people underestimate how many calories they consume, or are in individual foods and tend to overestimate how much they burn while exercising.

The one strong geographical difference with respondents was in Wales where they are significantly less likely to claim they had a **healthy diet** – only 58% said their diet was very/fairly healthy compared to 74% in London and 72% in the North East.

Another disconnection was apparent in **attitudes to weight**. Despite the predominantly positive perceptions of their diet, 37% of our respondents were not content with their current weight and discontent was significantly higher amongst women.

Women were more likely than men to claim they **cooked from scratch** at least once a day and it is also more commonly claimed by the over 65s. There were no significant differences geographically.

When it comes to the effect of health issues on our consumption of hot beverages, there's a clear trend happening. Consumption of that great British icon, **black tea**, continues to decline as people **switch to coffee** and more exotic tea flavours. Alongside this, **green tea** has been one of the beneficiaries of changing habits and this was reflected in our data. Green tea was drunk regularly by a fifth and a further 40% had tried it. It was more popular with women and more upmarket respondents.

Oily fish is well known as a healthy food but didn't seem to be on the rise in the way that **green veg** is. Most consumers claimed to be eating the same (50%), less than two years ago (12%) or have stopped eating oily fish altogether (8%).

Sugar has had an enormous amount of negative publicity in recent times and this was reflected in our findings with 49% claiming they were avoiding or limiting sugar consumption. 38% were limiting sugar in food for others, and this was significantly stronger among women, reflecting their still greater role in children's food selections.

Interestingly, **artificial sweeteners** didn't seem to be viewed very differently from sugar, with 41% saying they limit their sweetener consumption. Londoners and women were more likely to say they limit artificial sweeteners in food for others.

51% were limiting **salt** and again it was more common for women to say they limit salt for other people.

Dairy and **lactose** avoidance were at lower levels but still 26% said they were limiting their dairy intake and 17% were limiting lactose. Both of these behaviours – and especially lactose limiting – were more common in London than Wales or the North East.

Reflecting a pattern seen through the data, 49% were avoiding **highly processed foods**, with women significantly more likely than men to limit these foods for themselves and others.

the trouble with **bubbles** **food issues**

5

The single food issue that concerned most respondents was **high animal welfare** standards, with 78% claiming to be very or quite concerned. Women were more concerned about animal welfare standards than men. Somewhat surprisingly the number of 18-24 year-olds claiming to be concerned was significantly lower than in other age groups, in stark contrast to the widely reported increases in vegetarianism and veganism amongst young people.

This reflected the fact that throughout the research there was a general pattern for those living at home or with family to be more apathetic on many food issues and this group is populated mainly by young adults.

Their higher indifference could show their distance from the buying and cooking process but was a surprise nonetheless.

Authenticity has been a strong trend in food and this was evident in the research, with 72% saying they were very or somewhat concerned about authenticity, with women being more concerned than men but no major variations by location.

Fairtrade was a strongly felt issue with 59% claiming to be very or somewhat concerned, with London registering the highest concern, though Fairtrade sales patterns suggest much of the concern is theoretical rather than practical.

The organic trend continues to have an influence with 41% saying they are very or somewhat concerned about buying organic food, with this concern predictably more prevalent among ABs, 18-44s and in London.

Sustainability has attracted a lot of attention and that's reflected in the fact that 73% claim to be very or somewhat concerned about sustainability. It will be an interesting follow-up exercise to understand what sustainability means to people: what defines sustainability, how do they determine which foods are sustainable and how does it affect choices?

Local sourcing (60% concerned) and strong provenance (55% concerned) are both important issues for consumers, with those in London significantly more concerned about strong provenance.

Despite being the subject of much media coverage and a focus for many brands, relatively few respondents cared about **craft** with 62% saying they were not very or not at all concerned. Only in London with respondents aged 18 to 44 did craft have greater importance versus the national averages.

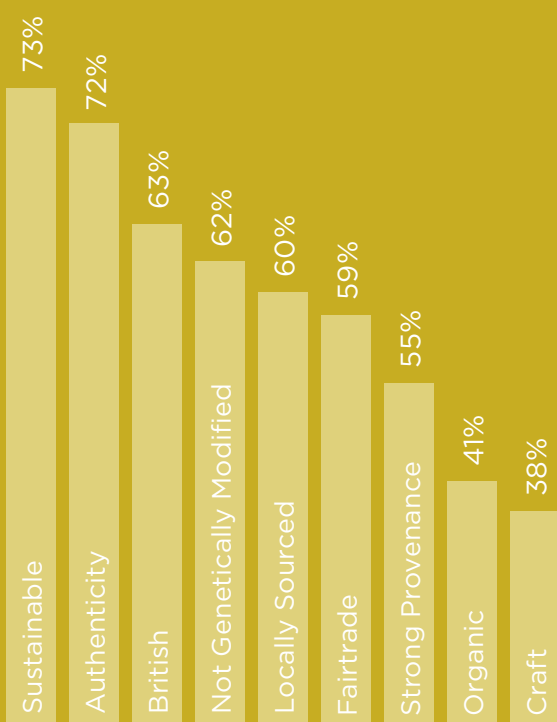
It's been a while since **genetically modified** food was in the news but it still has a major place in consumers' minds. 62% said they were concerned about not eating GM food, with women more concerned than men and those in London more concerned than those in Wales and the North East.



78%

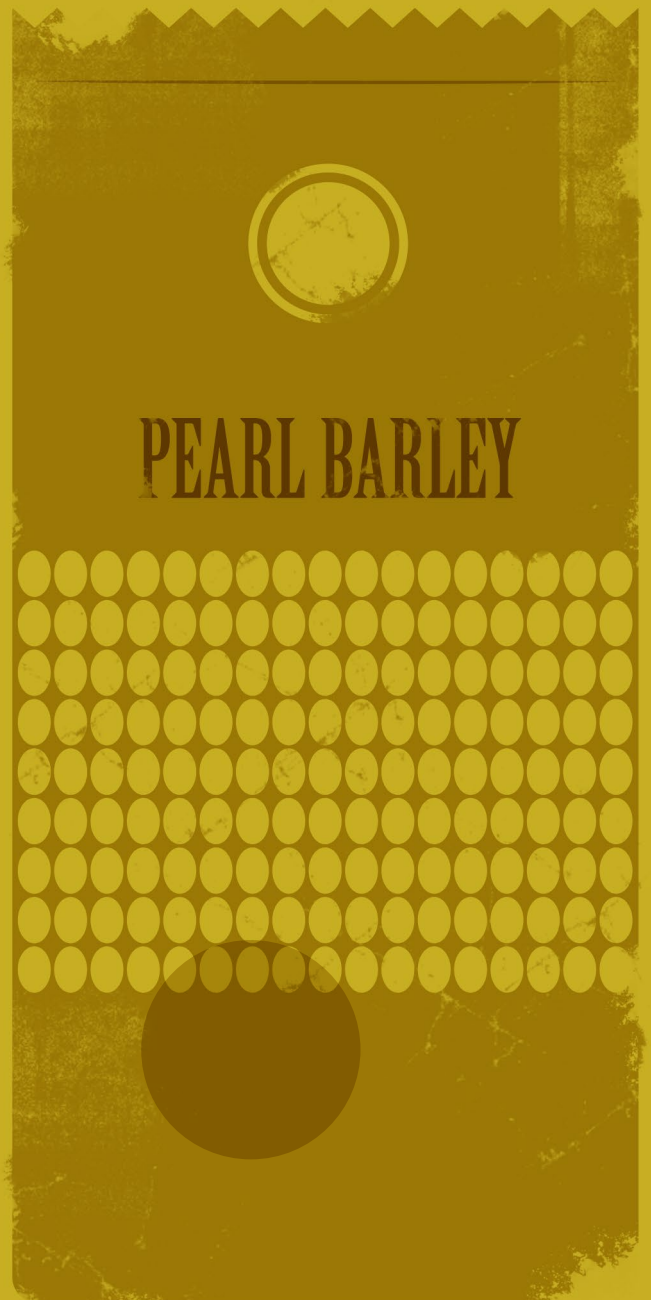
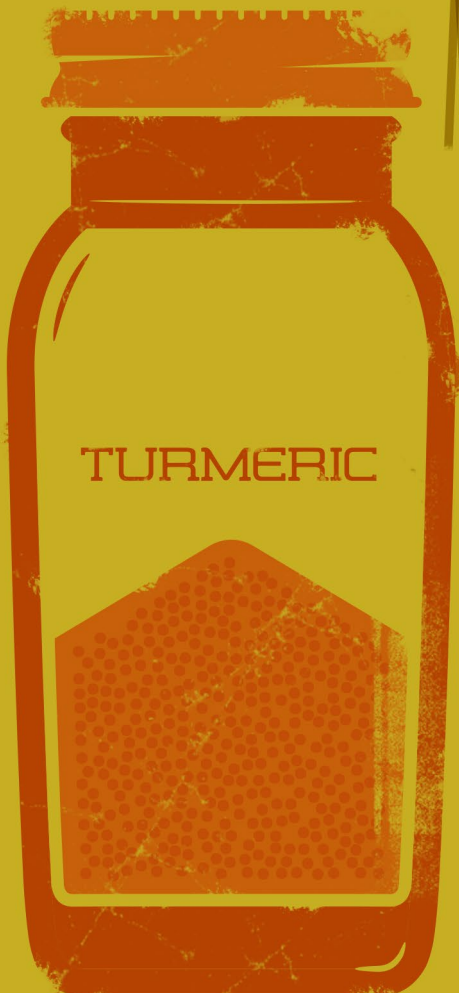
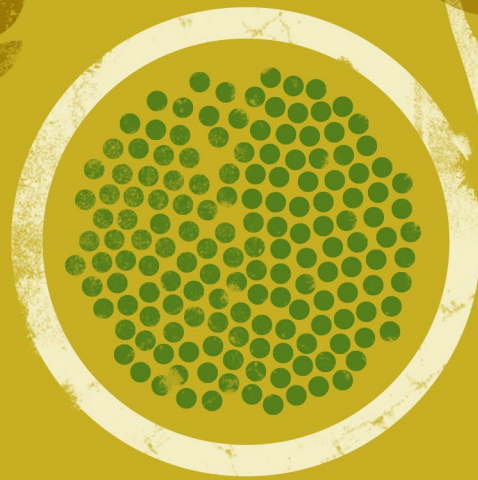
High Animal Welfare Standards

How concerned are you about the following aspects of food and drink you buy?



78%

of respondents are concerned about **animal welfare** standards in the UK



6 the trouble with bubbles fads and trends


Foods come and go. Some make no impression, some become part of the country's eating repertoire and some become fads, purely associated with a moment in time – anyone for acai and alfalfa sprouts?

Our research shows that health concerns are driving **fruit and veg** to the height of fashion and into people's repertoires. Once the very epitome of fussy, trendy superfoods, **quinoa** is increasingly mainstream, especially with women and upmarket consumers.

Processed foods have taken a few hits in the media in recent times and the effects can be seen in reduced numbers of people claiming to eat sausages and bacon, with red meat another victim of negative publicity.

As befits its place as an international fashion hub, London leads the way in voguish food too, with the more esoteric foods and those bubbling under having higher awareness, trial and claimed consumption there.

Below we show what's hot and what's not in terms of food fads and trends around the country.

WHAT'S HOT	
	Turmeric
	Quinoa
	Blueberries
	Spinach
	Broccoli
	Green tea
	Coconut water
	Coconut oil

WHAT'S NOT	
	Spelt flour
	Pearl barley
	Spirulina
	Wheatgrass
	Flax seeds
	Chia seeds
	Cacao nibs
	Bacon
	Sausages
	Red meat

7 the trouble with **bubbles** social media

Whilst social media is an all-encompassing force in our everyday lives, it's importance as a source of cooking information and inspiration can be overstated. The largest, most popular channels Facebook and YouTube lead the way when it comes to their importance to people's lives, however only 16% of people claim to use each channel for recipe ideas.

Facebook was the most likely place for respondents to post pictures of food when eating out and food they've cooked but this was still a minority habit, being carried out by about one in ten.

Twitter, Instagram, Pinterest and Snapchat were only peripheral interests with a clear majority of respondents not using any of them at all, let alone for anything food and drink related. As you'd expect, usage of all social media was higher in the younger age groups (18-34) and it was age rather than location that provided differences within the sample.

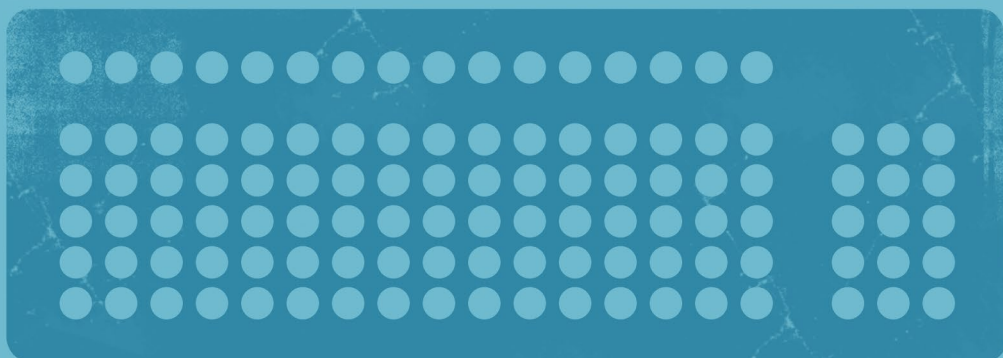
Despite social media's ubiquitous presence and influence across so many areas of modern life, when it comes to food and drink the research indicates that the established channels still lead the way. Food and drink websites, cookbooks and cookery programmes were used far more often by consumers, with cookbooks the most popular medium for recipe ideas and inspiration (used by 42%), ahead of celebrity chefs who were influenced by 28%.

Websites were the most used source for healthy eating tips, cited by 16%.

Many of the new breed of on-trend **food celebrities** that pepper the digital world and print media have very limited reach, with several having low awareness: 85% had not heard of Emma Katie, 84% Kayla Itsines, 82% Alice Liveing, 81% Robin Ellis, 81% Dr Xand van Telleken and, given her relatively high profile and media coverage, a rather surprising 70% had not heard of (Deliciously) Ella Mills.

With levels of awareness and interaction significantly higher than other **food bloggers, presenters and writers**, Joe Wicks was by far the best-known food and lifestyle celebrity, with 40% having heard of him, 6% saying they follow him on social media and 4% having bought his books.

Interestingly, despite the rise of the food blogger it was two women whose celebrity originates from outside food and drink who had most interaction with our respondents. It seems fame beats food knowledge. Davina McCall and Fearne Cotton were both known by around 90% of respondents – not surprising given their media presence – and had identical levels of deeper interaction, with 7% following them on social media and 4% claiming to have bought their books.



the take-aways

For those in the food and drinks industry, the Report highlights the real risks of not recognising the UK's geographical and cultural dividing lines, and of assuming the ubiquity of trends.

Our research has shown that marketers consistently overestimate the roles new trends play in people's lives. Today, more than ever, this kind of misjudgement can lead to real wastage in campaign spends and marketing work that meaningfully reaches a considerably smaller audience than was intended. Here are the conclusions we draw.

Beware stereotypes

Londoners might well be eating more spirulina and drinking more turmeric tea but there are over eight million of them and they're a diverse bunch. You'd be just as wrong to assume everyone in London lives like Gwyneth Paltrow as you would to assume everyone in Newcastle exists on brown ale and pies.

Your country needs you (to eat its food)

Britishness matters to most consumers, whether they feel Britain's interests are best served inside or outside of the EU. Supporting native producers and companies is seen as good no matter what your politics are.

Some channels are over-cooked

Bloggers and social media, much hyped, are effective when it comes to reaching specific audiences. However, their mass reach is still nothing to rival established channels.

People don't know what they're eating

Cognitive dissonance is alive and well. People's perception of their own habits and lifestyle is often only a flavour of a healthy lifestyle they aspire to. With tightening regulations regarding the advertising and marketing of HFSS products, UK consumers will start to rely less on fatty and sugary foods as their Food IQ rises and restrictions on marketing and supply tighten. However, there is still a long way to go.

Food issues come in different flavours

What consumers find important and what marketers think they find important are not the same. Emotive, news-agenda topics like GM and animal welfare have more resonance, and come way higher up the list than marketing terms like 'craft'.

You are not normal

Don't base campaign and channel strategy decisions on natural assumptions about people's motivations and behaviours. Your audience is not like you.

Get out of town

There are proven geographical discrepancies in behaviours, attitudes and beliefs when it comes to food and drink – you need a view of what they are and what they mean for your campaign messaging and delivery.

The UK may never have been more interested in and responsive to novelties and trends in food and drink and related health issues – but there are clearly risks in making broad assumptions and predictions about the strength of trends and preferences from region to region. To any food and drink brand marketer, we advise circumspection and research, to provide a geographically segmented view of any target audience 'bubbles' before committing to campaign expenditure.

