





## HEALTHY EATING

### RELATED CONSUMER TRENDS:

- Healthy eating is now an established consumer trend. The consumer palette is evolving towards more fresh, perishable food and there is greater consciousness of 5-a-day
- The majority of consumers try to eat healthily at home, but are more relaxed out of home, as eating out is still considered a treat
- Consumers are cooking more from scratch and rejecting less healthy takeaways and ready meals
- Healthy eating is increasingly important out of the home, but consumers are unwilling to compromise on taste. New product success will depend on exceeding consumer taste expectations
- Operators have worked hard to increase the offer of healthy food in eating out establishments and increase the provision of nutritional information available

### FUTURE DEVELOPMENTS:

- Greater provision and communication of nutritional information in eating out establishments
- Eating out establishments to offer a wider variety of healthy options
- Less of a focus on diet and eating healthily to lose weight and a greater focus on eating for overall well-being
- A more holistic approach to healthy living
- Long-term development of 'nutriceuticals' (products offering enhanced health benefits)





## FOOD CULTURE

### RELATED CONSUMER TRENDS:

- Greater consumer concern for provenance, authenticity, quality ingredients and seasonality of food both in and out of home
- Broadened consumer tastes and greater demand for a variety of cuisines – most popular cuisines are South East Asian and British inspired foods
- Consumers are far more adventurous eaters and are more open to try new foods and concepts
- Increase in the number of households who are cooking from scratch at home as consumers desire to produce and eat high quality food at home is heightened
- Food culture is fuelled by the media, cookery programmes, recipes books and foreign travel
- There is a greater appreciation of British sourced food and cuisine
- Stronger interest in farmers' markets
- Greater appeal of being perceived as a 'Foodie'



### FUTURE DEVELOPMENTS:

- Cooking and entertaining at home will become more trendy particularly in younger consumers as they emulate celebrity chefs
- Provenance and locally sourced food will continue to become more important as consumers desire authenticity and fresh, better lasting food
- Greater agreement over the definition of 'localness' and growth in farm shops
- Growth in low cost street-cuisine concepts, from East Asia, Mexico and the Middle East





## VALUE SCRUTINY

### RELATED CONSUMER TRENDS:

- Recession will leave lasting legacy of value-conscious consumers
- Price is playing a greater role in the value equation as consumers become more price conscious
- Consumers have become attached to the plethora of promotions/discount vouchers and expect these to continue beyond the recession
- Consumers are impressed with the quality offered since selectively trading down – many will not switch back to original retailers after the recession
- Greater use of lower cost products, as again, consumers are surprised by quality on offer

### FUTURE DEVELOPMENTS:

- Slow economic recovery is predicted, with only modest income growth and consumers remaining price conscious
- Enhanced share of consumer spending claimed by more price-led, lower-middle market players
- Pinpointing what constitutes value to customers and delivering it will be key to success of mid-market retailers and operators
- Promotions and discount vouchers set to be a continued feature of the marketplace



**EMPOWERED CONSUMERISM****RELATED CONSUMER TRENDS:**

- More demanding consumers who expect more from retailers and foodservice operators for far less and on their own terms
- Better informed and thirsty for more choice/customisation
- More food savvy, price aware
- Demand better value and an enhanced experience, but unwilling to pay for it
- Growth of the internet enables consumer to compare prices, restaurants and read reviews
- Internet access further enables consumers to conduct grocery shopping when it suits them

**FUTURE DEVELOPMENTS:**

- Technology to advance further and be more pervasive, giving consumers more information access and power
- Operators become far more customer-centric, putting customer understanding at the heart of their business plans
- Greater involvement with online communities and special interest groups
- Consumers to become more demanding around service and experience





**ETHICAL CONSUMERISM**

**RELATED CONSUMER TRENDS:**

- Decline in demand for some ethical products, such as organics, since the recession as consumers unwilling to pay premium price
- Despite the recession, there is a long term trend towards more responsible consumerism
- Consumers are increasingly aware over food provenance, ethical sourcing and operators’ environmental initiatives
- Strong and clear ethical credentials have emerged as a key business imperative that is raising the competitive hurdle

**FUTURE DEVELOPMENTS:**

- Demand for ethical products will return with economic recovery
- Consumers to put increasing pressure on operators and retailers to offer ethical products and adhere to environmentally friendly policies
- UK consumers soon to expect operators to be ethical without having to pay premium prices
- Greater use of environmentally-friendly store designs
- Reduced product packaging and more recyclable material





**GREATER INFORMALITY**

**RELATED CONSUMER TRENDS:**

- Increasing move away from formal dining both in and out of the home
- Driven partly by societal evolution and more pervasive ‘classlessness’
- Café culture has supported the move to informality as coffee shops provide a ‘third place’ environment which encourage consumer dwell time
- Better standards at lower/mid-market operators
- Home design is evolving with an increase in multi-functional rooms. Kitchen diners are commonplace in UK homes
- A high percentage of consumers eat dinner in front of the television



**FUTURE DEVELOPMENTS:**

- An increase in the number of informal eating out establishments
- Industry executives believe Fast Casual to be the business model expected to grow the fastest in the next 3-5 years
- Restaurants and cafés to encourage a communal environment through shared tables, newspapers, magazines
- More shared platters and menu options designed for sharing
- Greater ability to pick and choose between starters and main courses





**CONVENIENCE**

**RELATED CONSUMER TRENDS:**

- Consumers are busier than ever and as a result convenient food, location of food and packaging are all critical
- Increasing mobility has resulted in a greater demand for grab & go offered by supermarkets, petrol stations, coffee shops and fast food outlets
- The variety and quality of grab & go products continues to progress as consumers' expectations for the quality and choice heighten
- Although snacking is prevalent, with most consumers eating 1-2 snacks a day, meal times have not been replaced



**FUTURE DEVELOPMENTS:**

- Improved grab & go offer, particularly hot food
- Significant growth in outlets and standards from leading multiple store convenience operators
- More impactful grab & go displays with better merchandising, positioning and signage
- Provision of bundled and semi-prepared meal solutions for time-pressed consumers
- Development of faster microwaves and more intelligent vending machines

