



GREAT
BRITISH
CHEFS

NATIONAL SURVEY GREAT BRITISH CHEFS INSIGHT

In March 2017, Great British Chefs conducted a comprehensive survey with 2,007 consumers who were recruited to reflect the UK population (aged 18–74). The same survey was run with the Great British Chefs audience and weighted to reflect the demographics of our website visitors, according to Google Analytics. These two surveys together provide a unique insight into the UK's love affair with food and allows us to understand how our audience compares to the the general population.

A significant 39% of Brits describe themselves a foodies, a majority of 65% believe that food is one of the great pleasures in their life and over 50% agree that they enjoy talking about food and what they are planning to eat.

A nation of cooks (not couch potatoes)

But Brits are not just talking about food or watching cookery programmes on TV, as 68% love/enjoy cooking. They are not a shy bunch either, with only 8% considering themselves to be below average at cooking.

67% of Brits agree that they like to try new recipes, and 30% are cooking more than five times a week. Health is becoming a mainstream preoccupation, with over 55% claiming to be careful about what they are eating and seeking to control their intake of sugar, salt and fat. However, avoiding specific items like fish, meat, gluten and/or dairy remains small but significantly more prevalent with younger audiences.

Sourcing ingredients

In terms of sourcing ingredients, around half of those in the UK agree that they enjoy finding and buying unusual ingredients and 53% of Brits are interested in where ingredients come from. However, the general population seem less prepared to pay for the quality and specialist products that they desire.

Eating out

53% of British people eat out every month and a core group of 17% eat out every week. When it comes to the high-end world of Michelin, almost a third of Brits claim to have eaten in a restaurant with a Michelin star but only 13% have visited one in the last 12 months.

In summary

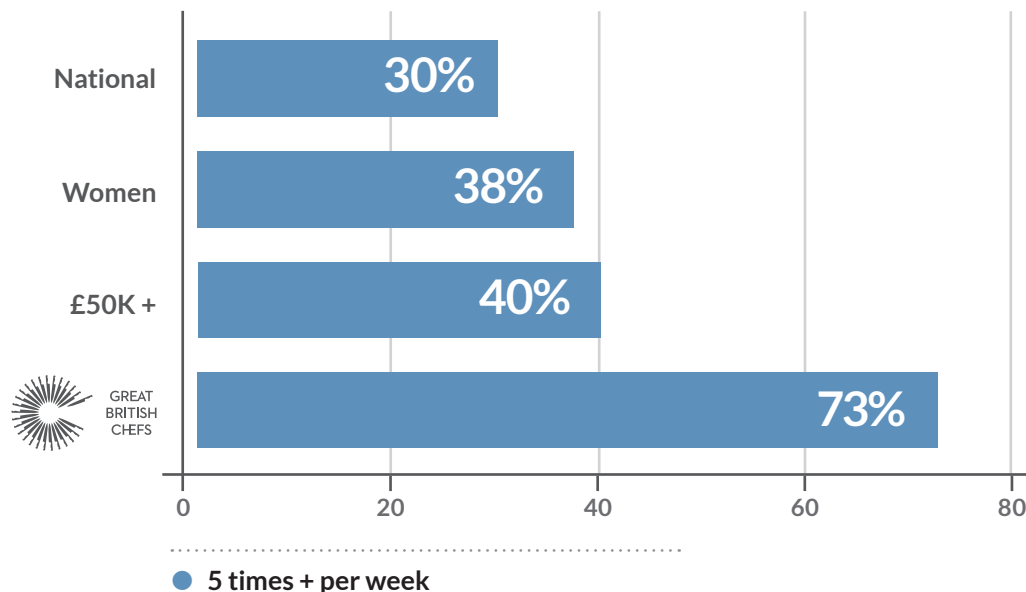
Britain has a healthy appetite for great food and the challenge for brands is to engage the right audience with the right story. The days of targeting national audiences because of their socio-economic or demographic profile should be behind us.

Britain's 12 million foodies are driven by their interest, or passion for food and cooking – they experiment widely and are prepared to pay for quality

How does the Great British Chefs audience compare?

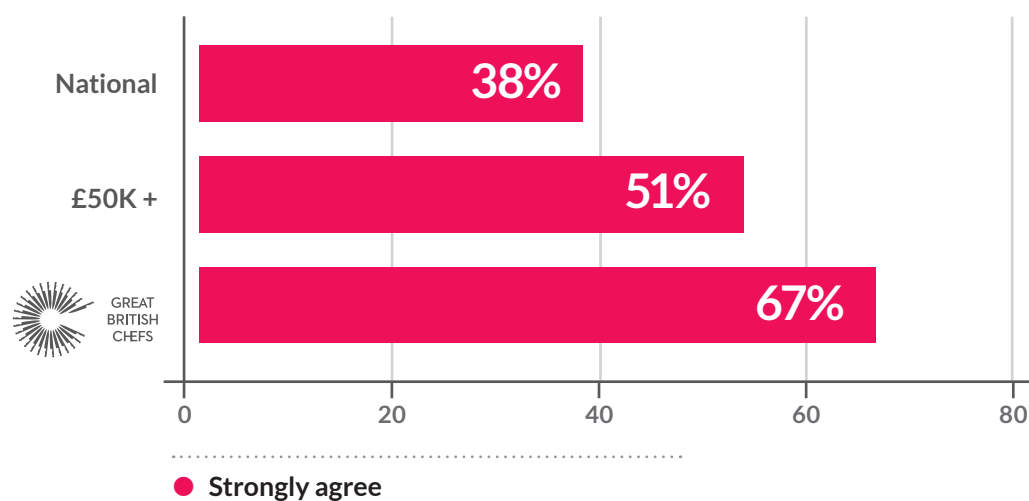
Not surprisingly, the Great British Chefs audience is significantly more into food, cooking, premium ingredients and eating out than the national average. The surprising factor is that while more wealthy demographics (with a £50,000+ household income) and socio-economic group AB are more into food than the average Brit, they are not foodies who are prepared to spend on food by default. The Great British Chefs audience is proactively cooking and buying interesting ingredients.

Scratch cooking



Question: In a typical week how often do you personally cook using fresh ingredients, rather than using a ready meal, or pre-made sauce?

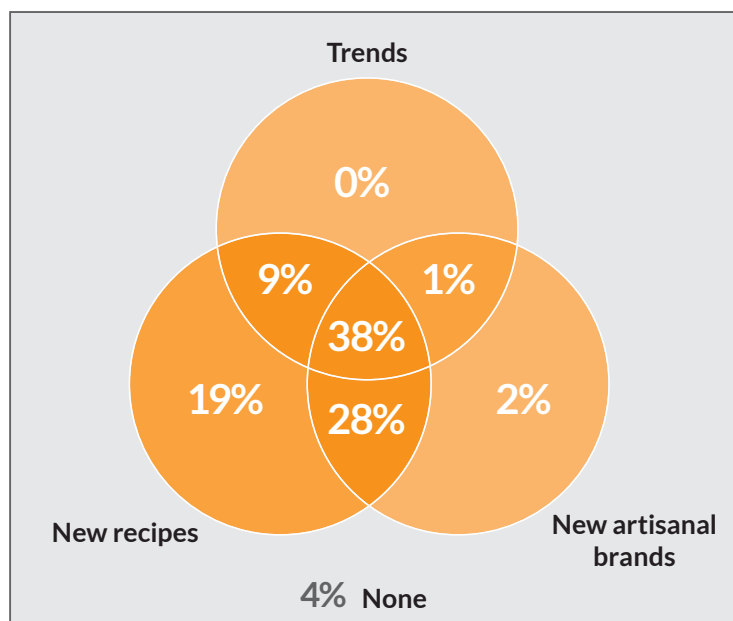
Artisanal food brands



Question: To what extent do you agree with the following statement: I like discovering new artisanal food brands

What also becomes clear is that there is a group of highly influential foodies who are happy to pay extra for quality brands, seek out products with strong provenance stories and love cooking. The people in this group are seen by their friends as being trendsetters and are very well represented amongst Great British Chefs' audience. For brands that want to establish habits amongst Brits, they would do well to focus on influencing the influencers.

Great British Chefs audience overlaps



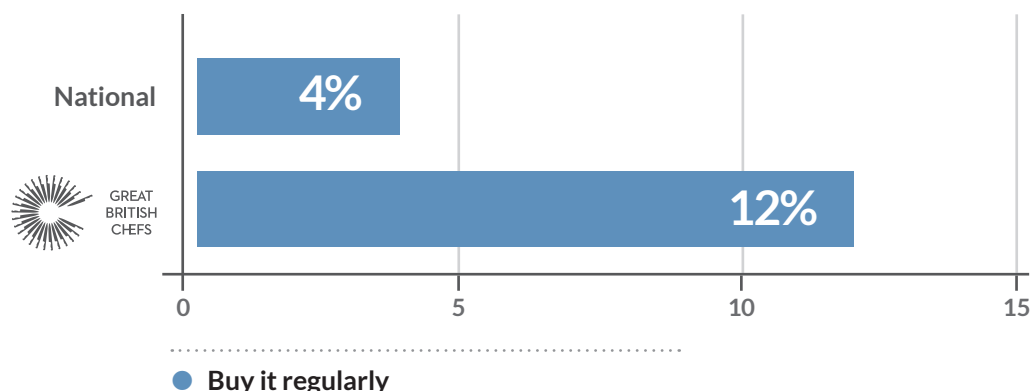
Questions: My friends expect me to know about the latest food trends

I like to try out new recipes

I like discovering new artisanal food brands

When we look at the specific purchasing behaviour of our audience versus the UK average, it is clear that our audience is purchasing more premium food brands like Lurpak, San Pellegrino and others by a considerable margin. It is also worth noting that amongst the brands that are working with us (see chart below), the margin is even greater.

Brand Partner X



Background to the survey

Great British Chefs conducted the survey in early April 2017 and used a third party supplier to collect responses from the national sample. The national sample was weighted to ensure that it had representative samples for gender, regionality, age and socio-economic group. The Great British Chefs survey was weighted to reflect the age and gender profile of our website traffic according to Google Analytics.

The survey contained over 40 questions and included a range of demographic data. The sample size in both the national and Great British Chefs data sets allows us to analyse answers on a wide range of breaks. In addition, we are able to segment the data based upon attitudinal statements. This has allowed us to create a custom segmentation that we are leveraging to help our brand partners reach the right audiences.

Brits love cooking

Britain is a nation of cooks, with 68% of Brits who either love or enjoy cooking. A tiny 3% actually hate cooking with no statistical difference between men and women. The younger groups (18–24, 25–34), Londoners and those with children enjoy cooking more than the national average.

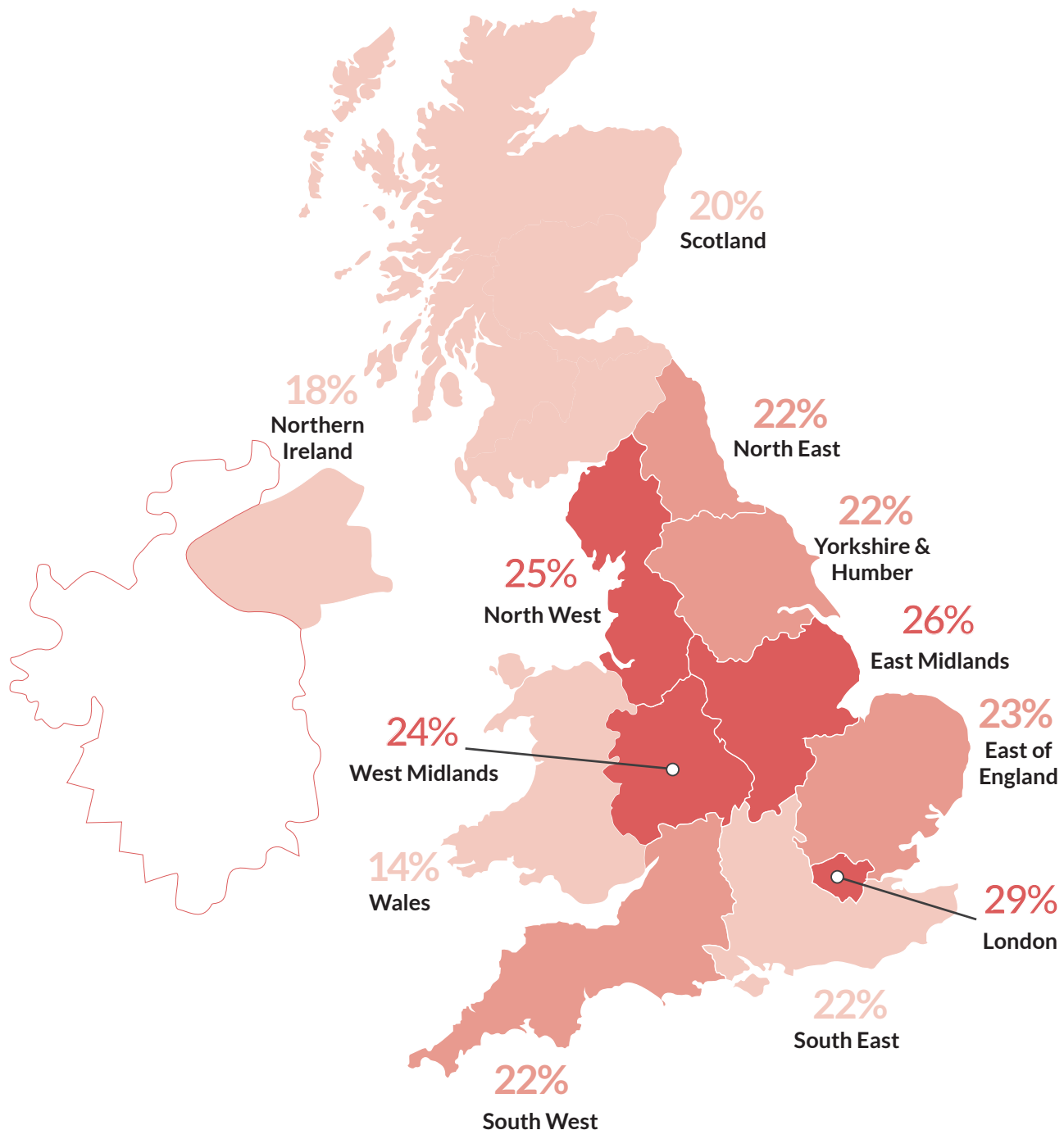
Enjoyment of cooking



Question: How much do you enjoy cooking?

Love map of Britain

While 23% of Brits love cooking, the level of love differs by region. London (29%) tops the charts. While many companies assume that they should target the South to reach food lovers, it appears that the North of England loves cooking more than the South. England as a whole, however, loves cooking far more than Scotland, Northern Ireland and Wales.



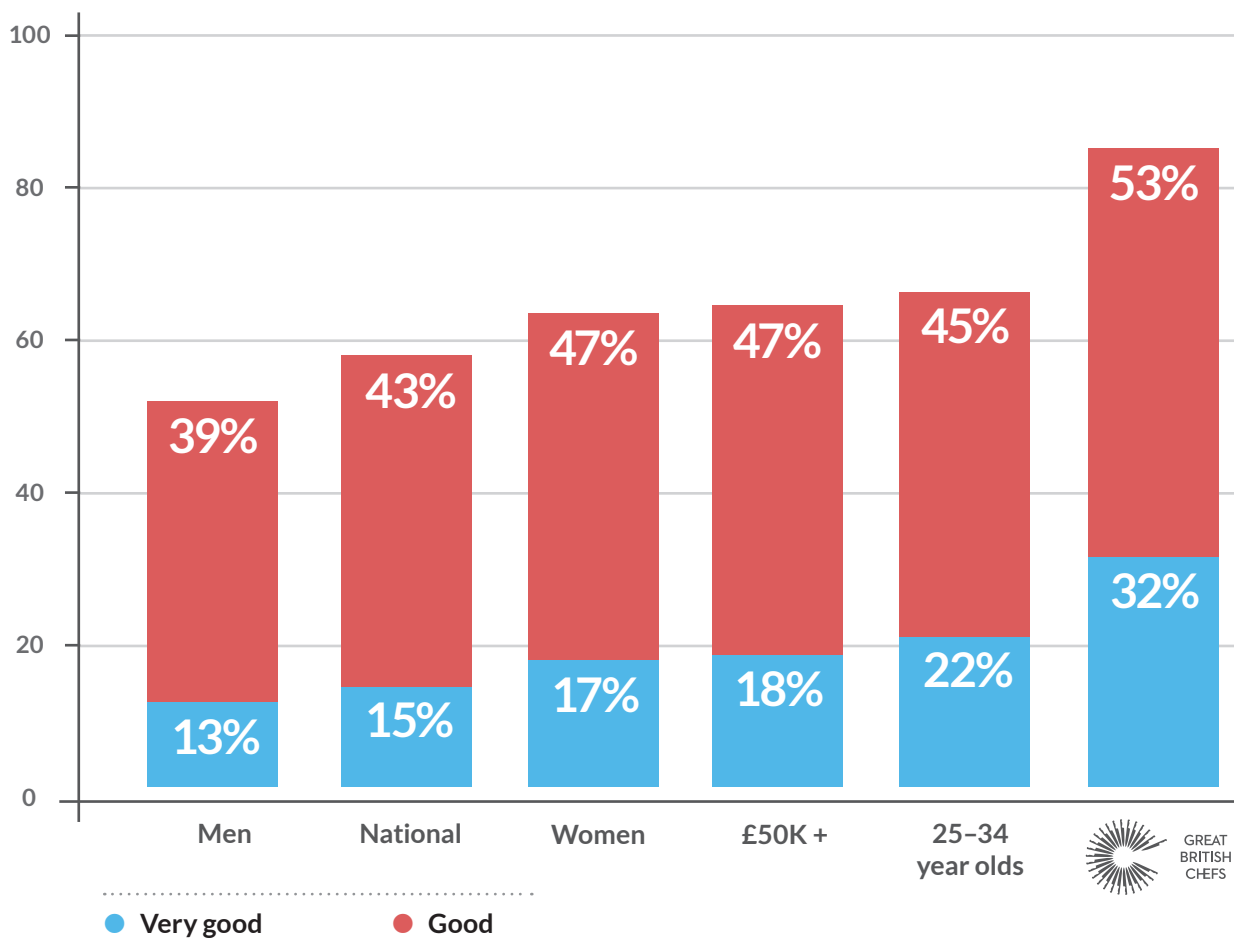
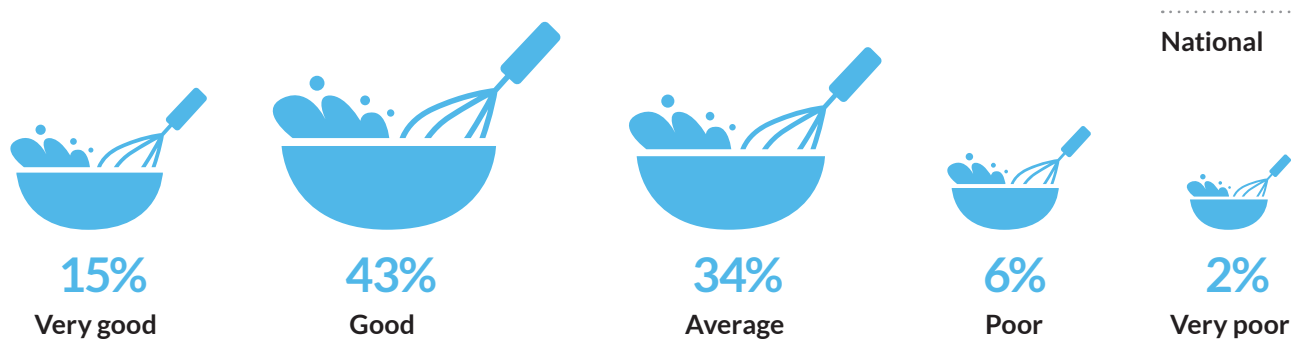
Question: How much do you enjoy cooking?

Data shows those who answered 'LOVE'

Great cooks

While statistically impossible, only 8% of Brits consider themselves to be below average at cooking. Those aged 25–34 consider themselves the best cooks and women consider themselves better than men at cooking. London, the South West and the West Midlands top the charts with regards to regional confidence in the kitchen. Amongst the Great British Chefs audience, nearly a third consider themselves ‘very good’.

Cooking ability

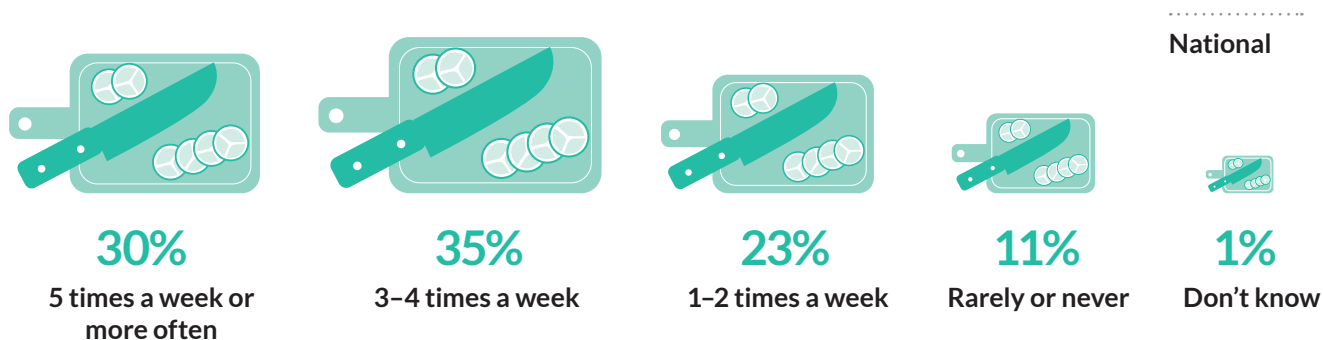


Question: How would you rate your ability as a cook?

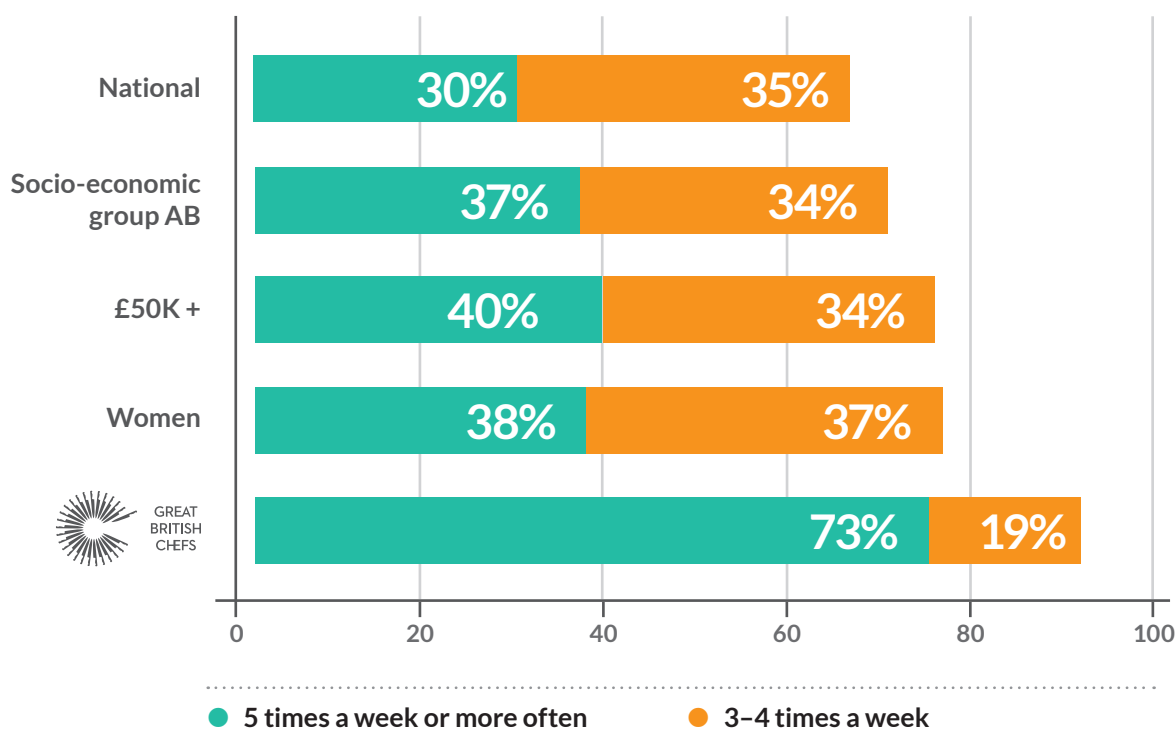
Scratch cooking

65% of Brits are cooking at least three times a week and 30% are cooking more than five times a week. Men cook less frequently than women and the young (18-24) cook far less than older groups (55+). Londoners, with all their choice of restaurants, are still cooking in line with the national average. Amongst the Great British Chefs audience, over 70% are cooking more than five times a week from scratch.

Cooking with fresh ingredients



Food brands that are trying drive to penetration would be well advised to target foodies. They are cooking the most frequently and have the widest portfolio of dishes (see foodie survey).




Question: In a typical week how often do you personally cook using fresh ingredients, rather than using a ready meal or pre-made sauce?

Range of proteins

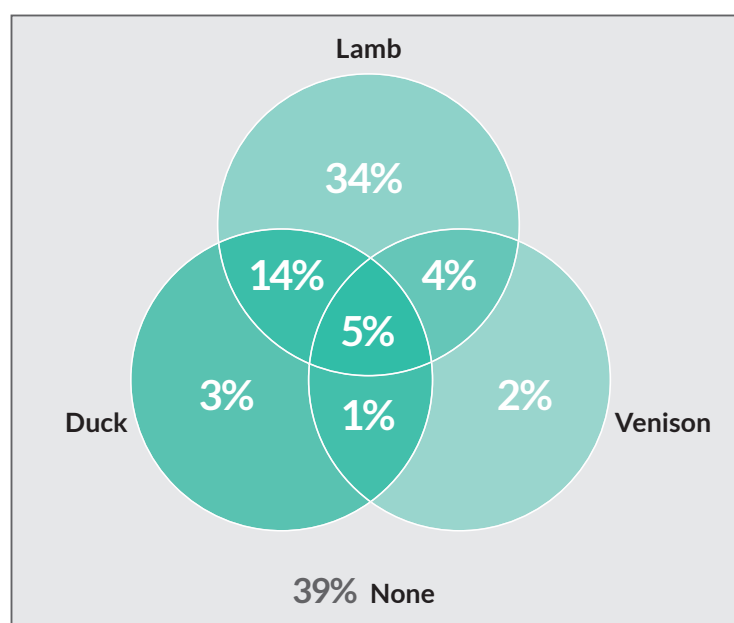
39% of the UK have not cooked either Lamb, duck or Venison in the last six months and 25% have not cooked any of the proteins contained in the survey (lamb, duck, venison, sea bass, mackerel, salmon, crab, monkfish or scallop) in the last six months. 20% are cooking more niche proteins like duck, sea bass and mackerel and this rises significantly amongst socio-economic group AB. Great British Chefs' foodie audience are cooking a far wider range of proteins.

Proteins cooked

National

	Lamb	Salmon	Duck	Sea Bass	Mackerel	Venison	Scallop	Crab	Monkfish	None
National	59%	50%	22%	19%	18%	11%	10%	9%	5%	25%
Socio-economic group AB	59%	60%	28%	29%	23%	15%	20%	15%	12%	20%
£50K +	65%	63%	32%	29%	28%	15%	19%	15%	12%	18%
 GREAT BRITISH CHEFS	77%	73%	56%	50%	42%	33%	37%	26%	21%	8%

National overlap

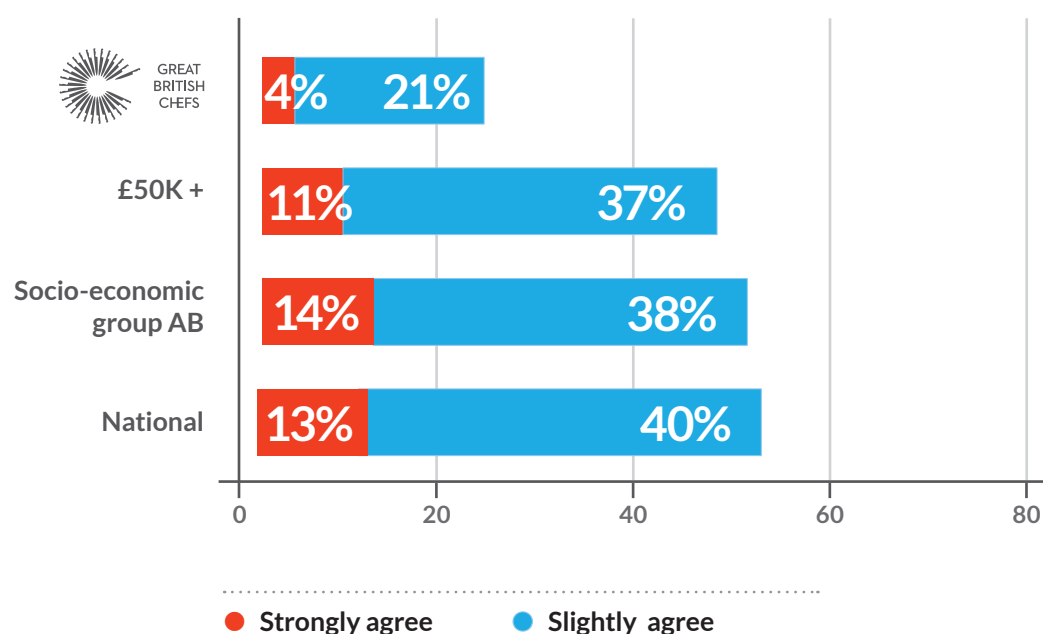
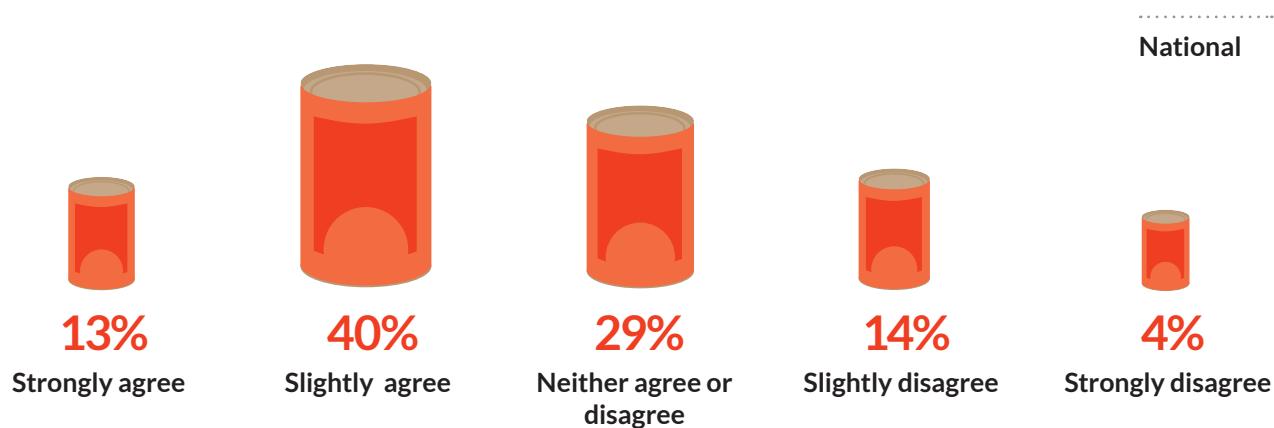


Question: Which of the following have you cooked in the last six months?

Experimentation

Over 50% of Brits like to stick to the food and brands they know, increasing to 57% amongst the over 65s and 60% amongst socio-economic group DE. Users of Great British Chefs are more open to trying new things, with only 25% agreeing with the statement 'I like to stick to food and brands I know' and 45% actively disagreeing with it.

Sticking to what I know



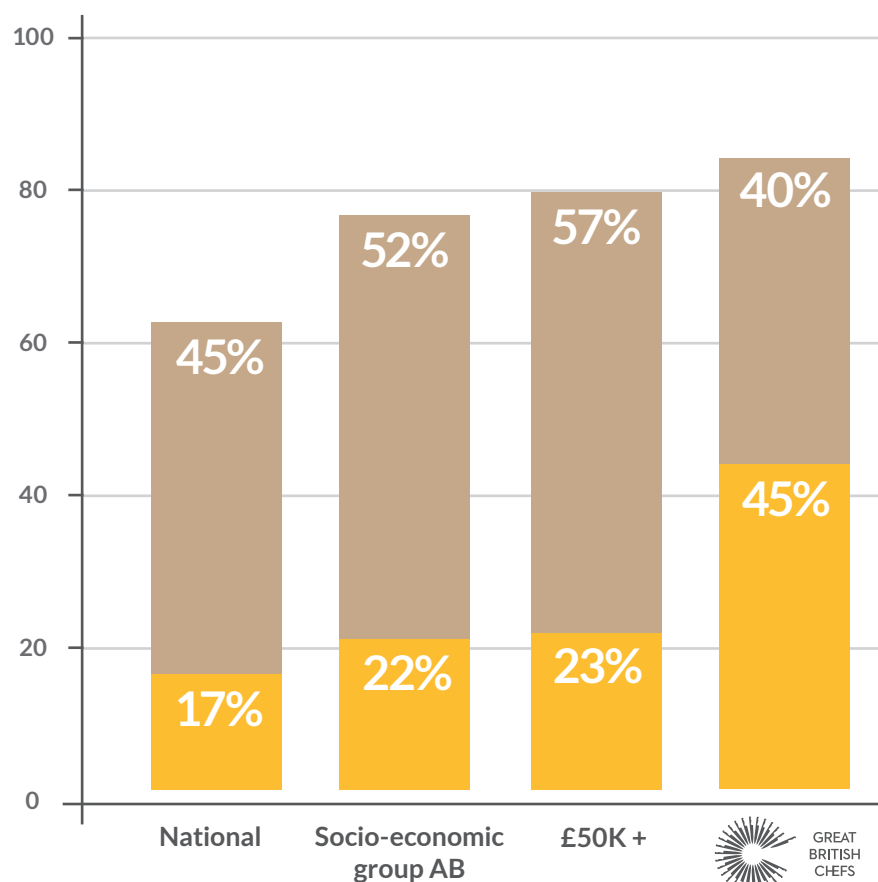
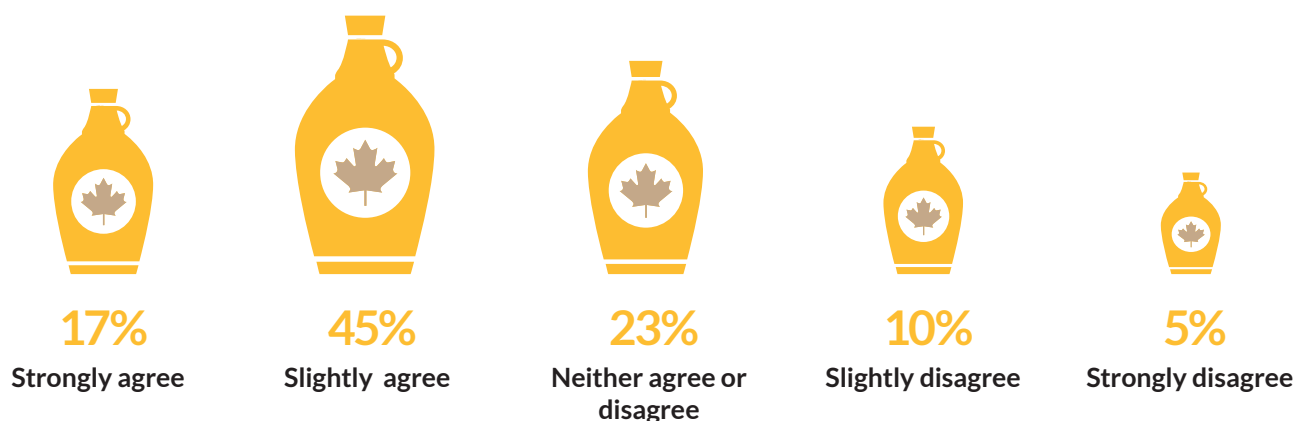
Question: To what extent do you agree with the following statement - I like to stick to the food and brands I know

Paying extra for quality

62% of the UK are happy to pay extra for quality food products. This sentiment increases to 80% amongst those earning more than £50,000 and to 85% amongst Great British Chefs' foodie audience. Londoners are also very happy to pay for quality with over 70% saying they would pay more for quality.

Investing in quality food

National



While more affluent consumers are naturally prepared to pay for quality, this does not necessarily translate into paying for quality food. Premium food loving audiences are however, happy to pay for quality food as food genuinely matters to them. This insight is key for brands to understand.

- Strongly agree
- Slightly agree

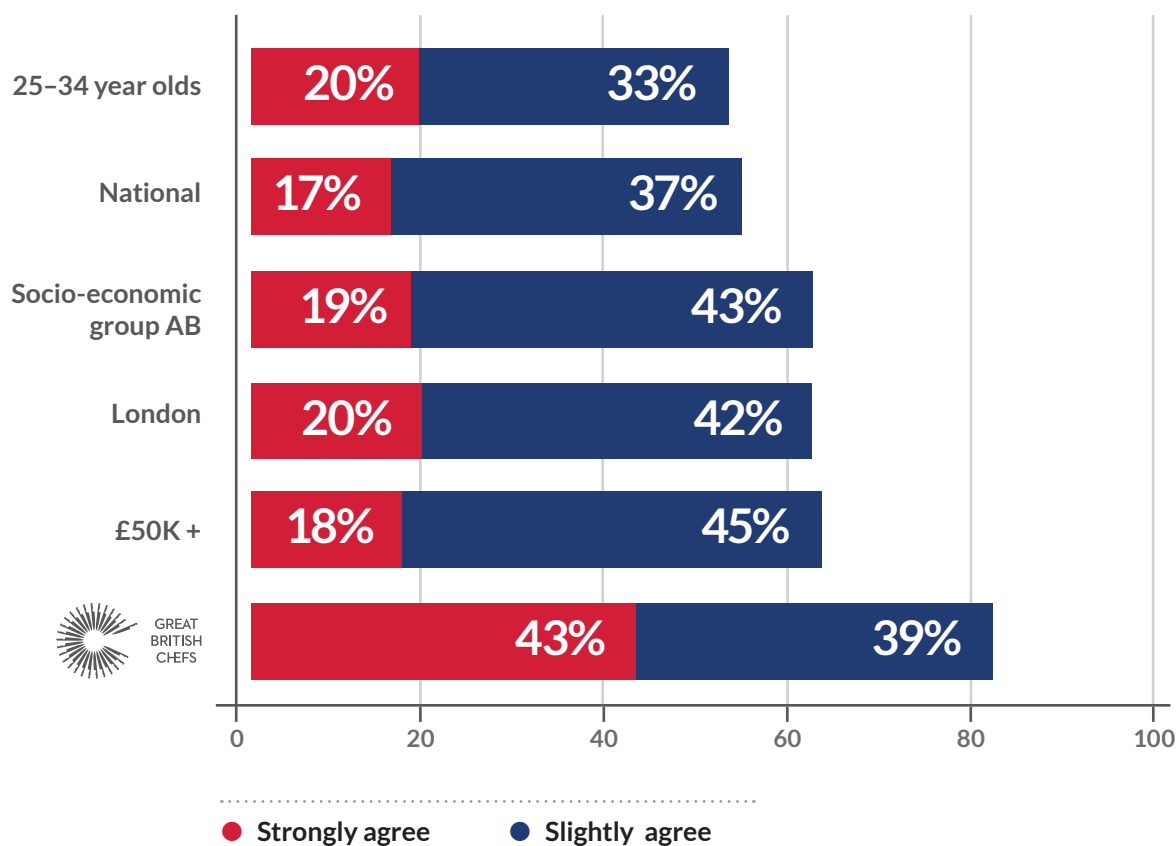
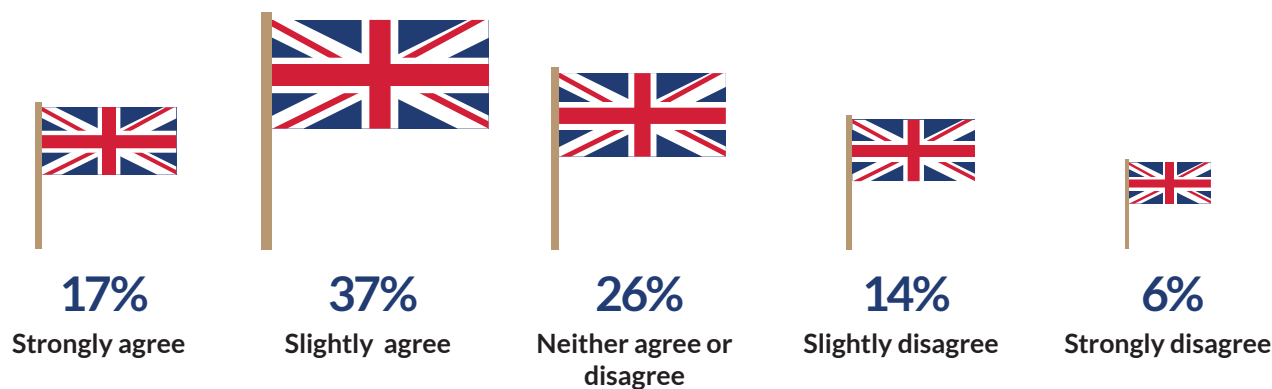
Question: To what extent do you agree with the following statement - I am happy to pay a bit extra for quality food products

Origin of products

53% of Brits agree with the statement 'I'm interested in where the ingredients I buy come from'. This increases to 61% amongst Londoners and 63% in households that earn more than £50,000 per annum. Women are also more interested in knowing the origin of their food than men. For Great British Chefs users, this sentiment increases to 83%.

Where ingredients come from

National

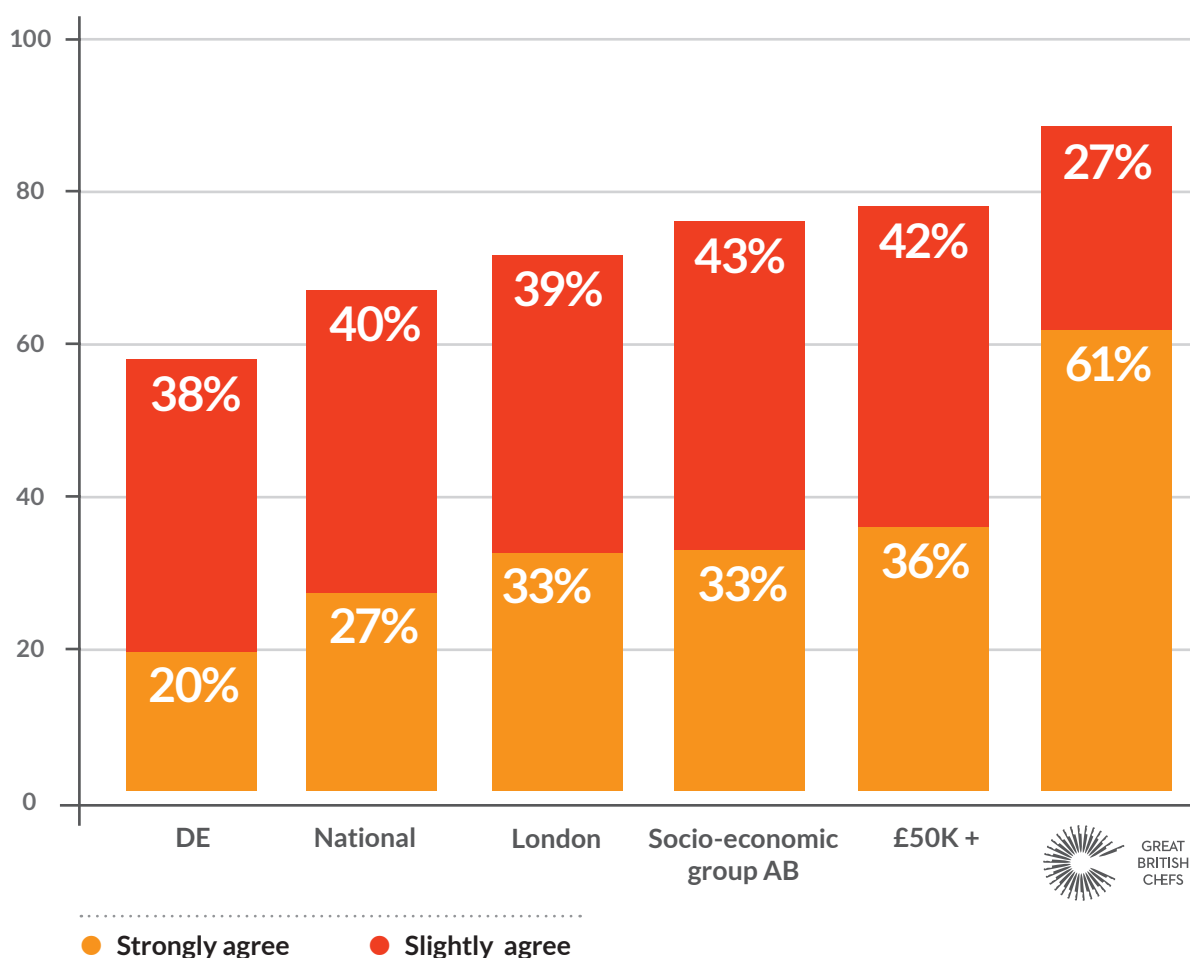
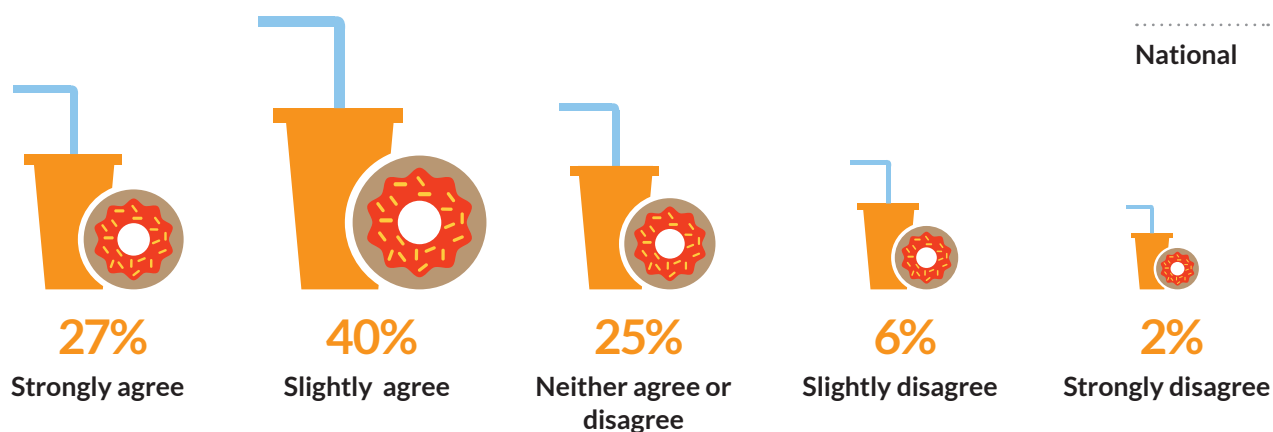


Question: To what extent do you agree with the following statement - I'm interested in the where the ingredients I buy come from

Processed vs unprocessed

66% of the UK try to choose unprocessed foods over processed foods when possible. A tiny 8% of Brits say they don't do this, showing that recent food scandals seem to have had a profound effect. The desire to avoid unprocessed food increases amongst more affluent and foodie communities.

Choosing unprocessed foods



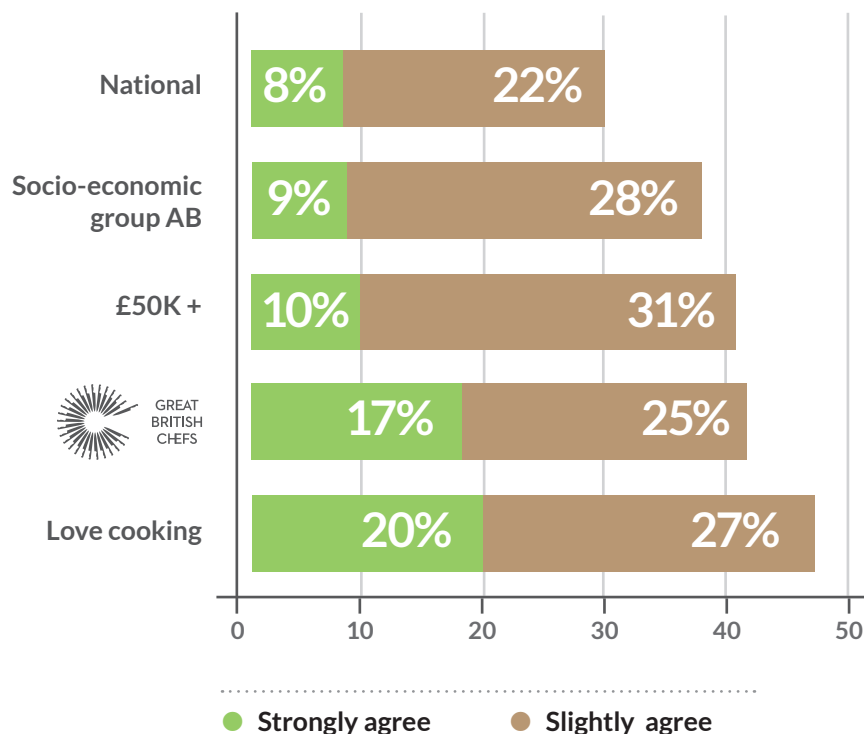
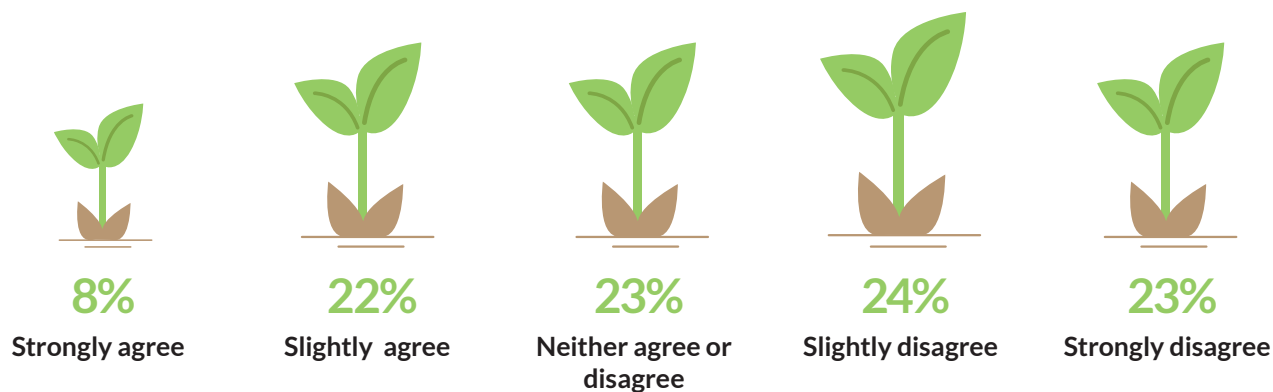
Question: When possible, I choose unprocessed foods rather than processed foods.

Organic

Almost 30% of UK consumers claim to buy organic food regularly, which shows that the organic movement has truly moved into the mainstream. However, there remains a sizeable opportunity for organic as 47% say they don't. The groups that are most into organic food are those with children under the age of 10, Londoners and those with higher incomes. Amongst those that love cooking, 47% agree that they often buy organic produce.

Buying organic

National

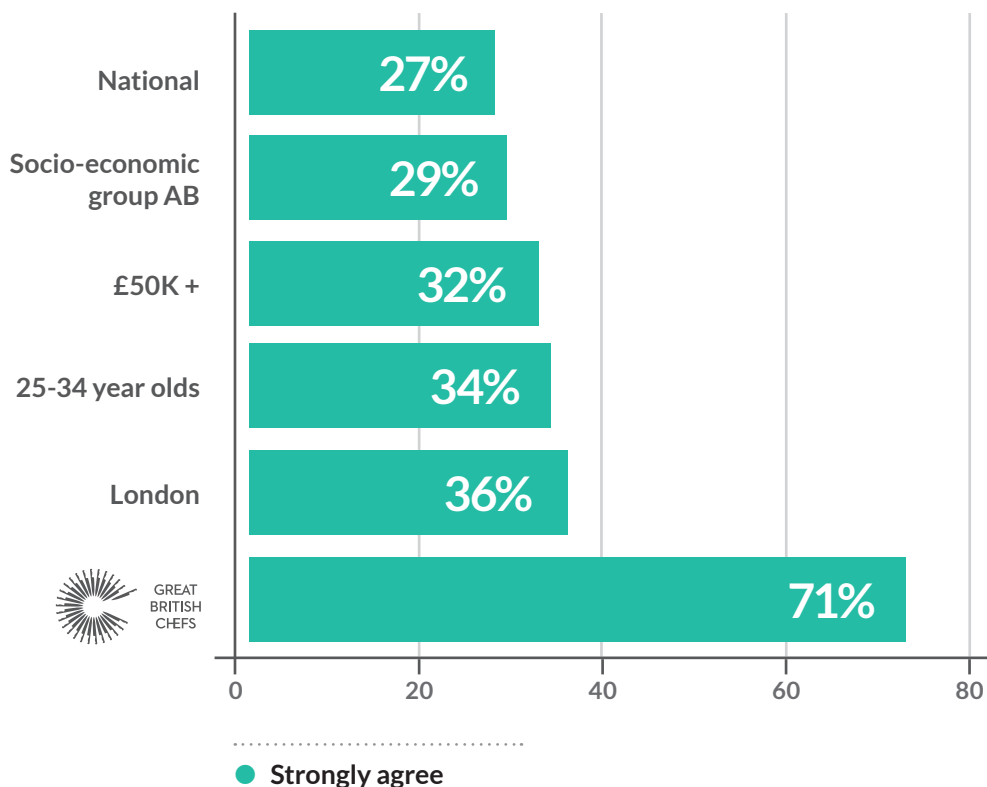
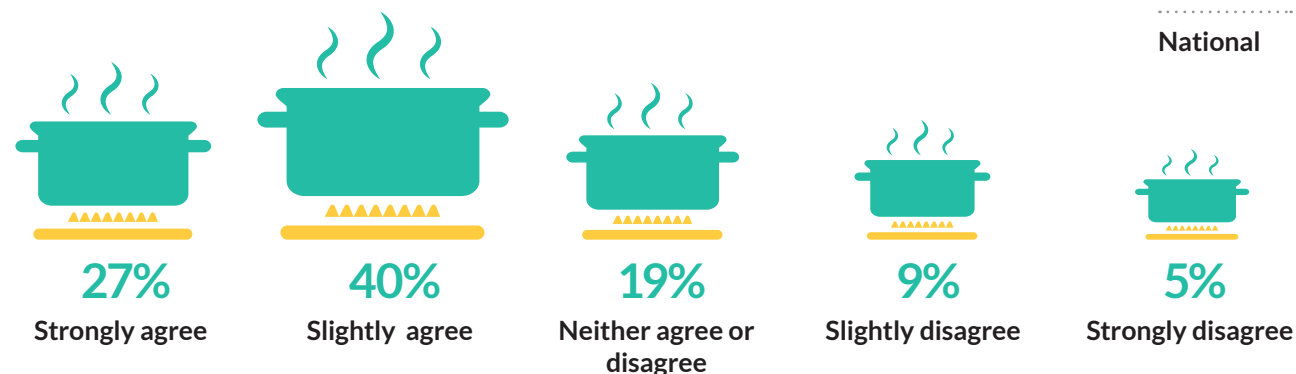


Question: To what extent do you agree with the following statement - I often buy organic products

New Recipes

67% of Brits agree that they like to try new recipes. As a whole, women like trying out new recipes more than men. Those aged 25–34, Londoners and those with kids aged under 18 are most likely to 'strongly agree' with the idea that they like trying out new recipes. Higher income consumers (£50,000+) are considerably more likely to enjoy cooking something new although nothing like as much as Great British Chefs' foodie audience.

Trying new recipes



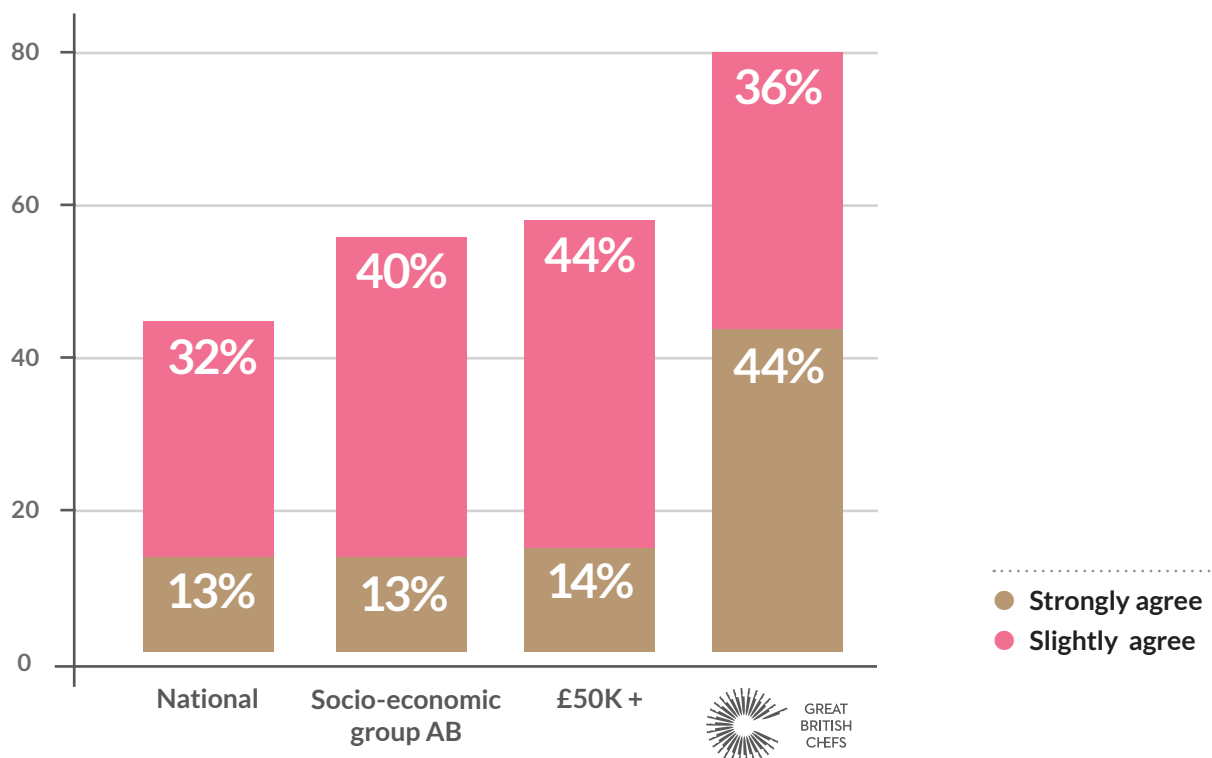
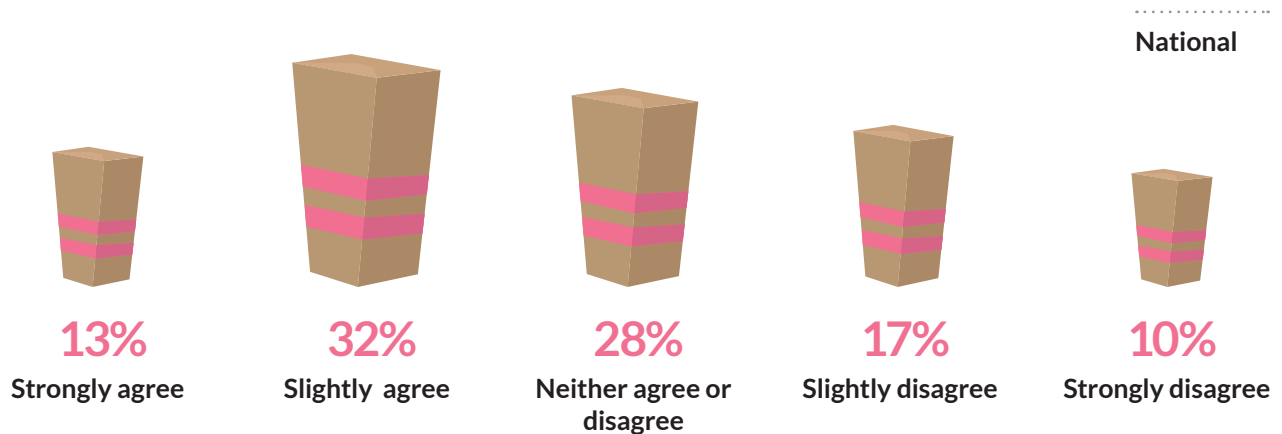
Food brands that are trying to get more consumers to use their product either at all or more regularly, would be well advised to target foodies. They are cooking the most frequently and have the widest portfolio of dishes.

Question: To what extent do you agree with the following statement - I like to try out new recipes

Finding and buying unusual ingredients

45% of those in the UK agree that they enjoy finding and buying unusual ingredients. The under-44s are far more likely to enjoy finding and buying unusual ingredients than older audiences. Not surprisingly, most of Great British Chefs' foodie audience agrees with this statement (80%).

Unusual ingredients

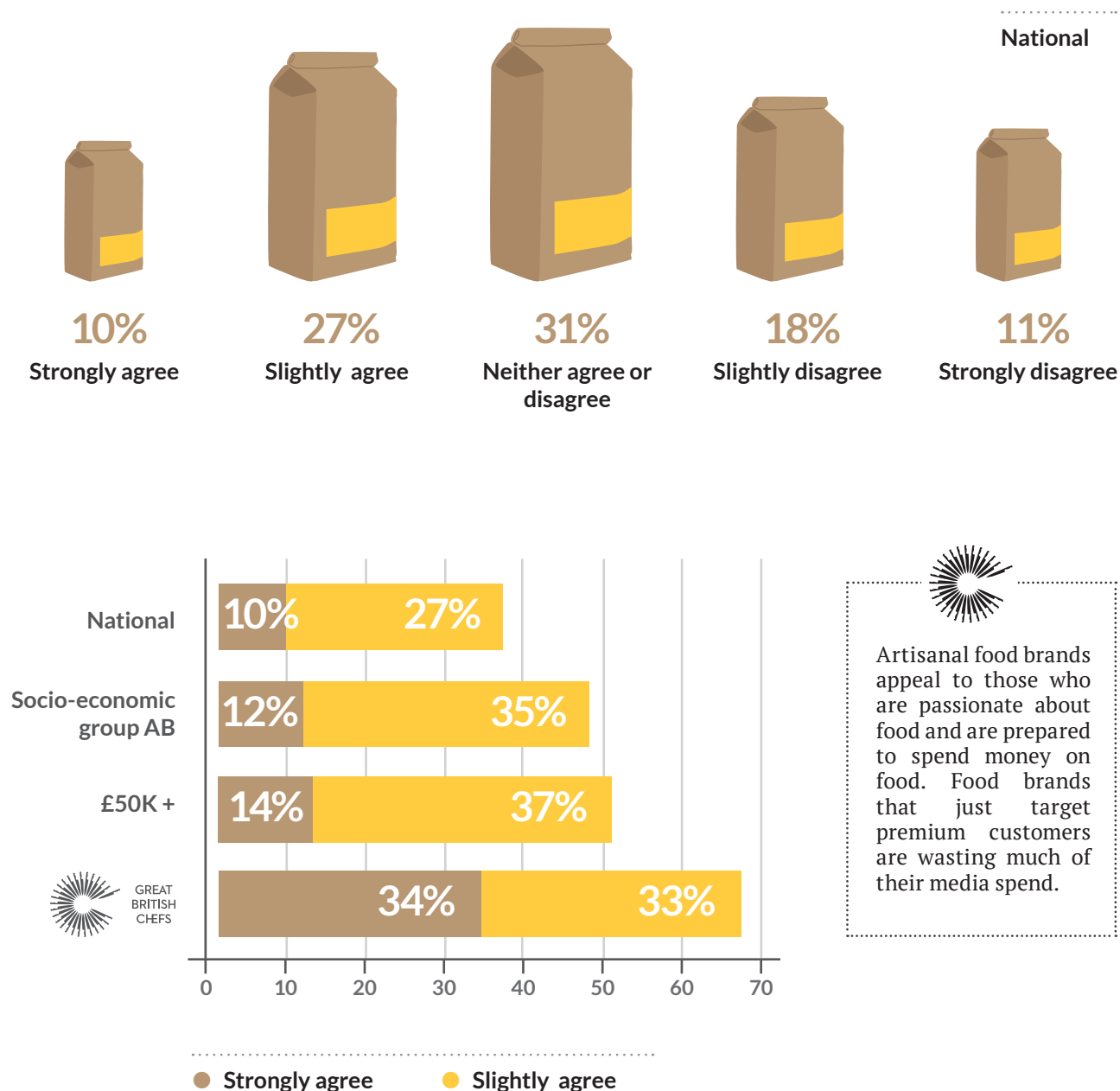


Question: To what extent do you agree with the following statement - I enjoy finding and buying unusual ingredients

Artisanal food brands

More people living in the UK agree with the statement 'I like discovering artisanal food brands' than disagree, perhaps confirming the idea that we have become much more of a foodie country. More wealthy consumers (socio economic group AB / households earning over £50,000+) are even more likely to enjoy discovering artisanal food brands than the national average but at nowhere near the level of Great British Chefs' food seeking audience.

Discovering artisanal food brands

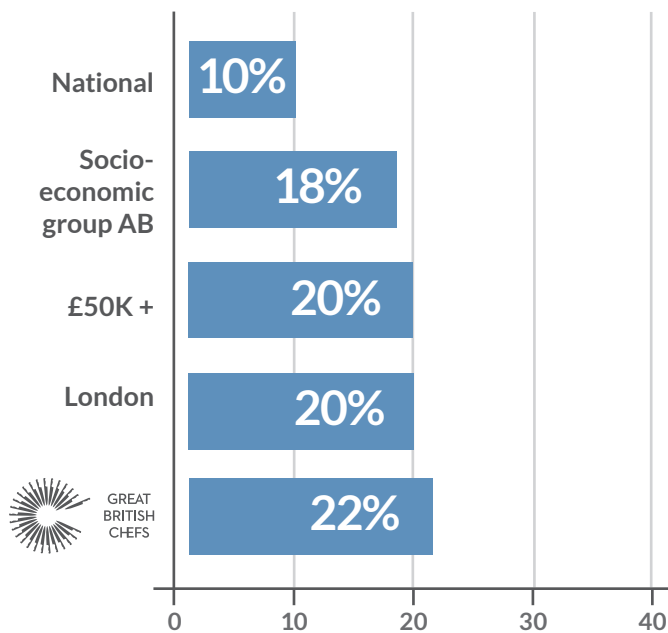


Question: To what extent do you agree with the following statement - I like discovering new artisanal food brands

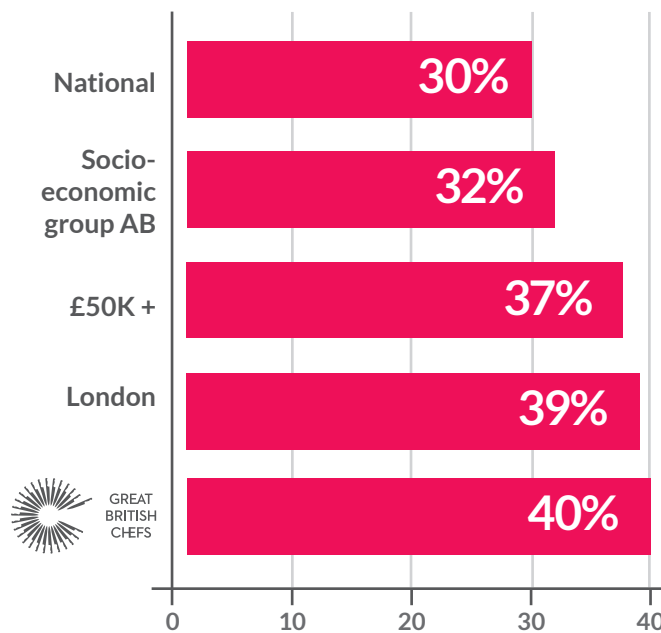
Brand Purchasing

Within the surveys, we included a wide range of premium food brands to understand how often they are being purchased by different audiences. The picture that emerges is that premium food brands are purchased by Great British Chefs audience more than any other segment (see chart below). This is greatly intensified further when the premium brand in question is a partner of Great British Chefs (see brand partner and exemple in summary).

Purchasing premium brands



● Buy it regularly



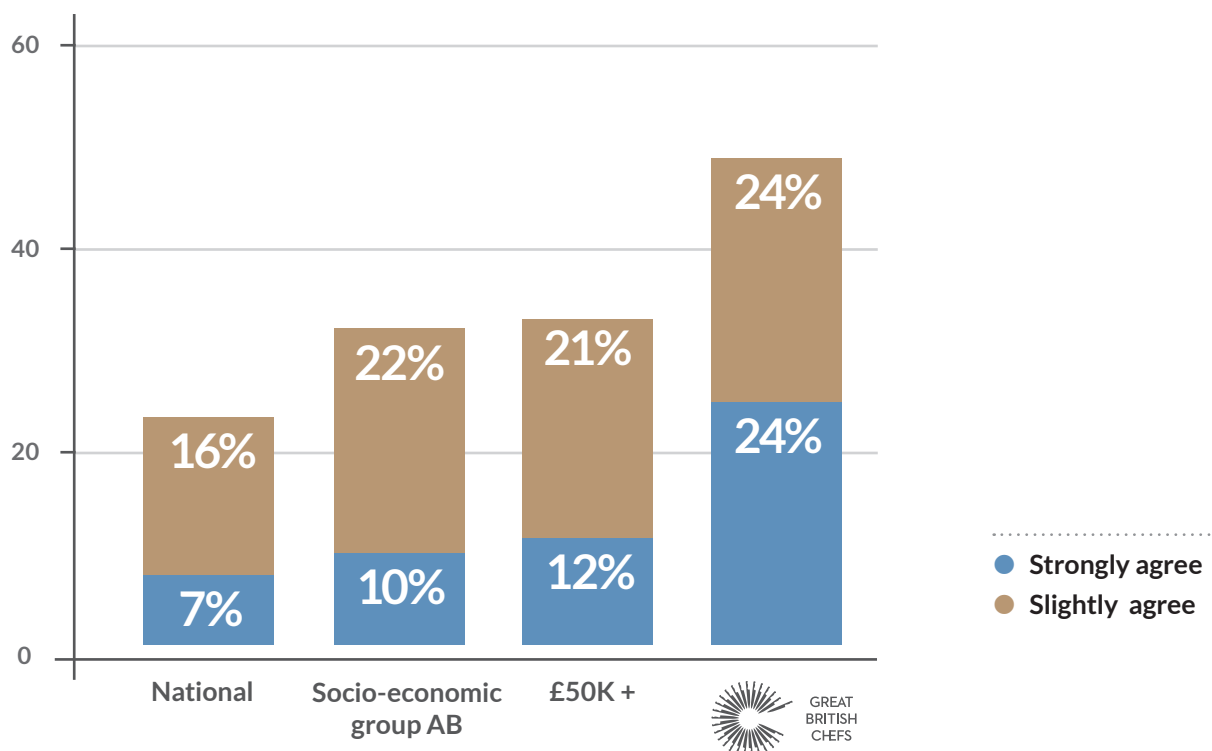
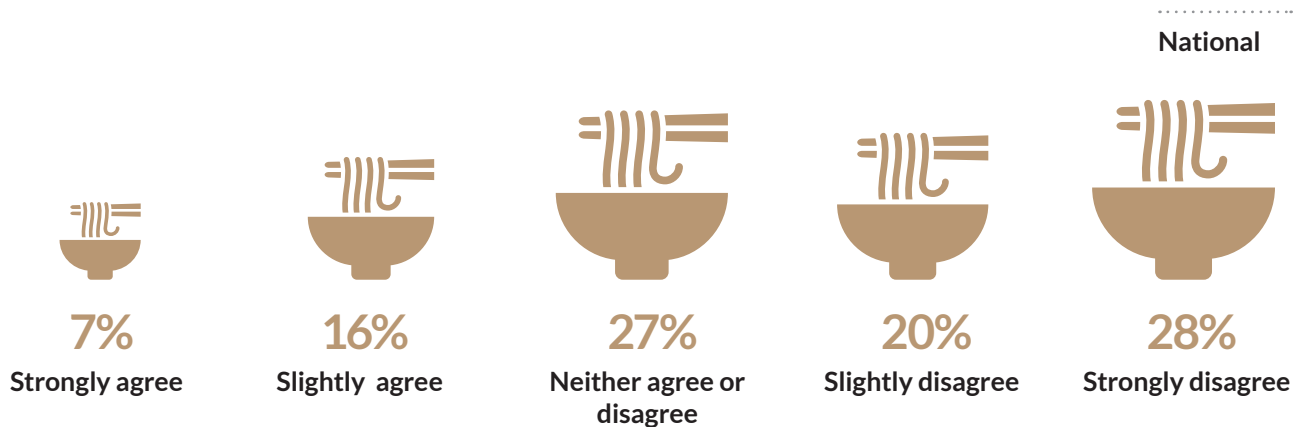
● Buy it regularly

Question: Which of these brands are you familiar with?

Trends

23% of Brits agree with the idea that they are expected to know about the latest food trends. 25–44 year old, Londoners and socio-economic group AB are the most likely to believe that their friends expect them to know the latest trends. However, Great British Chefs' audience agree at a significantly higher level than any other group at 48%

Knowing the latest food trends

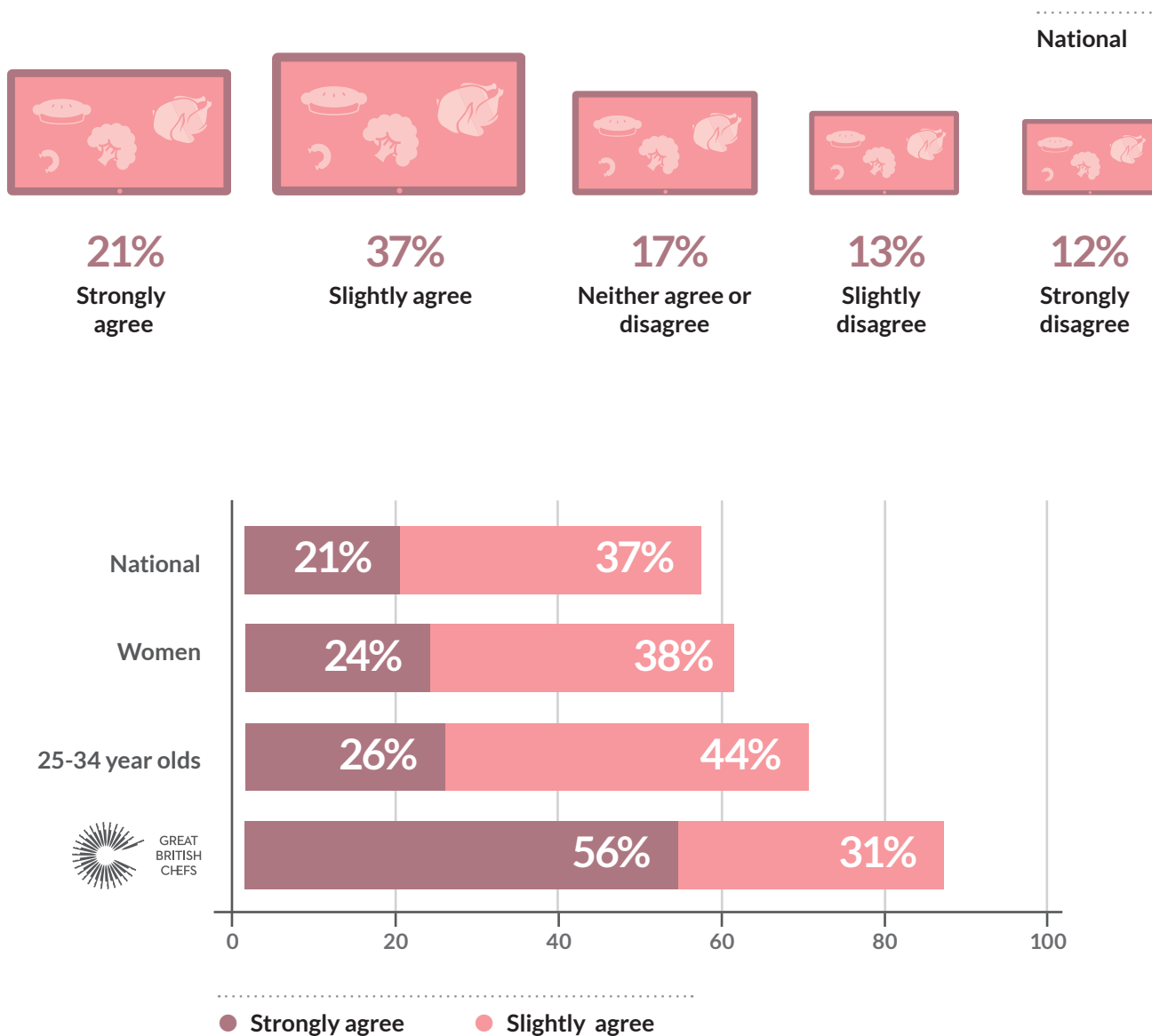


Question: To what extent do you agree with the following statement - my friends expect me to know about the latest food trends

Food TV

57% of Brits agree with the statement that they enjoy watching food TV programmes, which helps explain some of the incredible viewing figures that programmes like MasterChef and Bake Off deliver. 25–34 year olds derive the most enjoyment from watching food-related TV, as do women. Considering their obsession with all things food related, it is not surprising that 86% of Great British Chefs users enjoy watching food TV programmes.

Watching food TV programmes

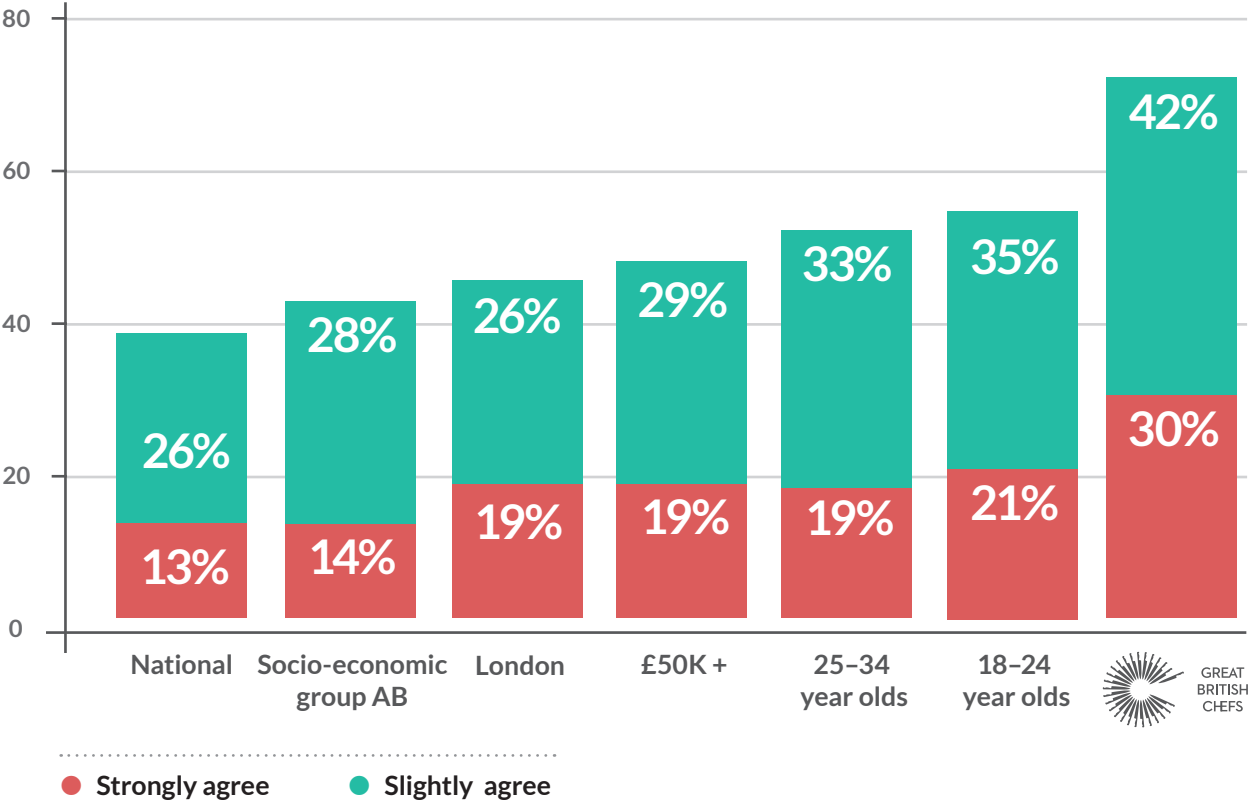
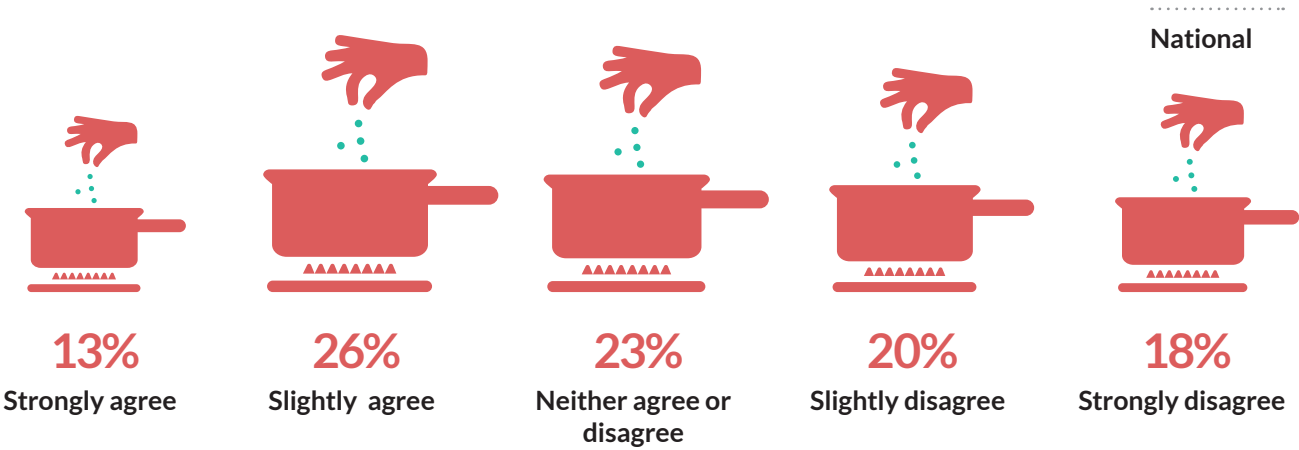


Question: To what extent do you agree with the following statement - I enjoy watching food TV programmes

Foodies

Britain is split into three: those who would describe themselves as foodies (39%), those who aren't sure (24%) and those who would not (37%). The label resonates with younger (56%) and (to some extent) more affluent audiences (47%). However, there is a distinct group of people who overwhelmingly (72%) describe themselves as foodies within the Great British Chefs community.

I am a 'foodie'

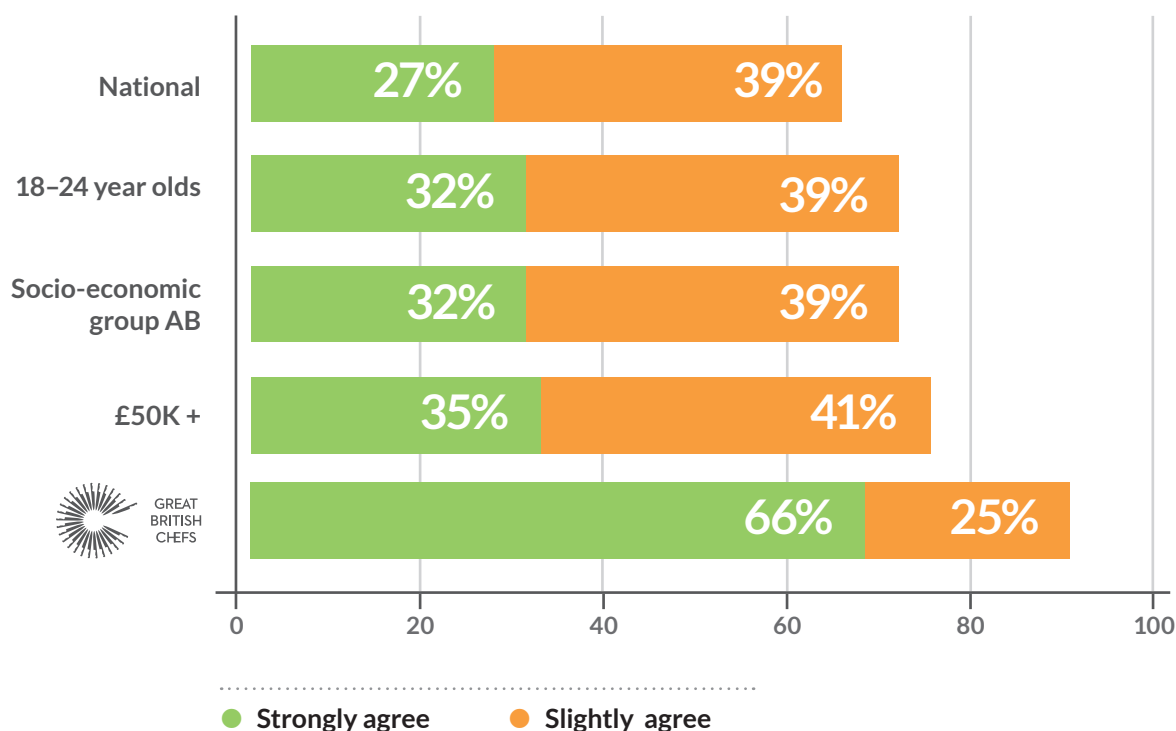
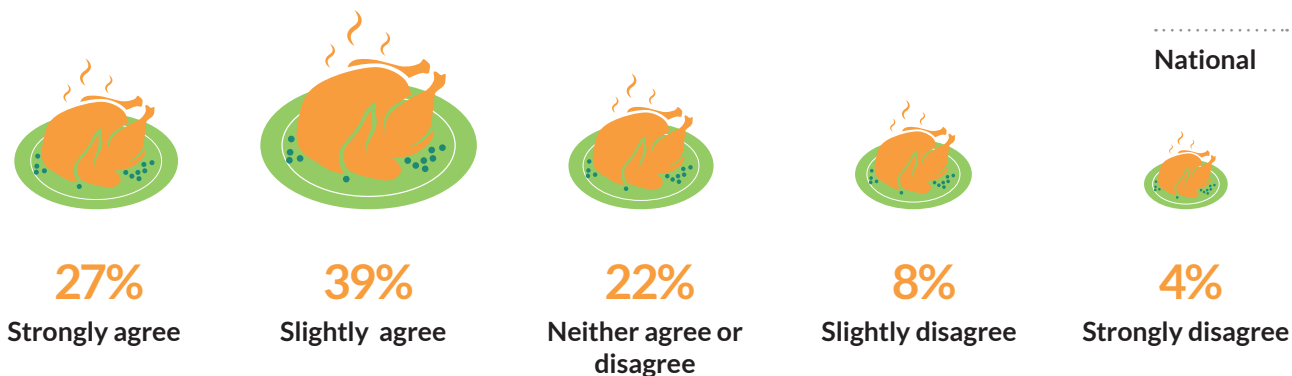


Question: To what extent do you agree with the following statement - I would describe myself as a 'Foodie'

Food as pleasure

66% of Brits believe that food is one of the great pleasures in their life and only 12% actively disagree with this statement. The degree of agreement with this statement increases to 70% amongst 18-24 year olds. Not surprisingly perhaps, 91% of Great British Chefs' foodie audience agrees that food is one of their great pleasures, with 66% strongly agreeing with the statement.

A great pleasure

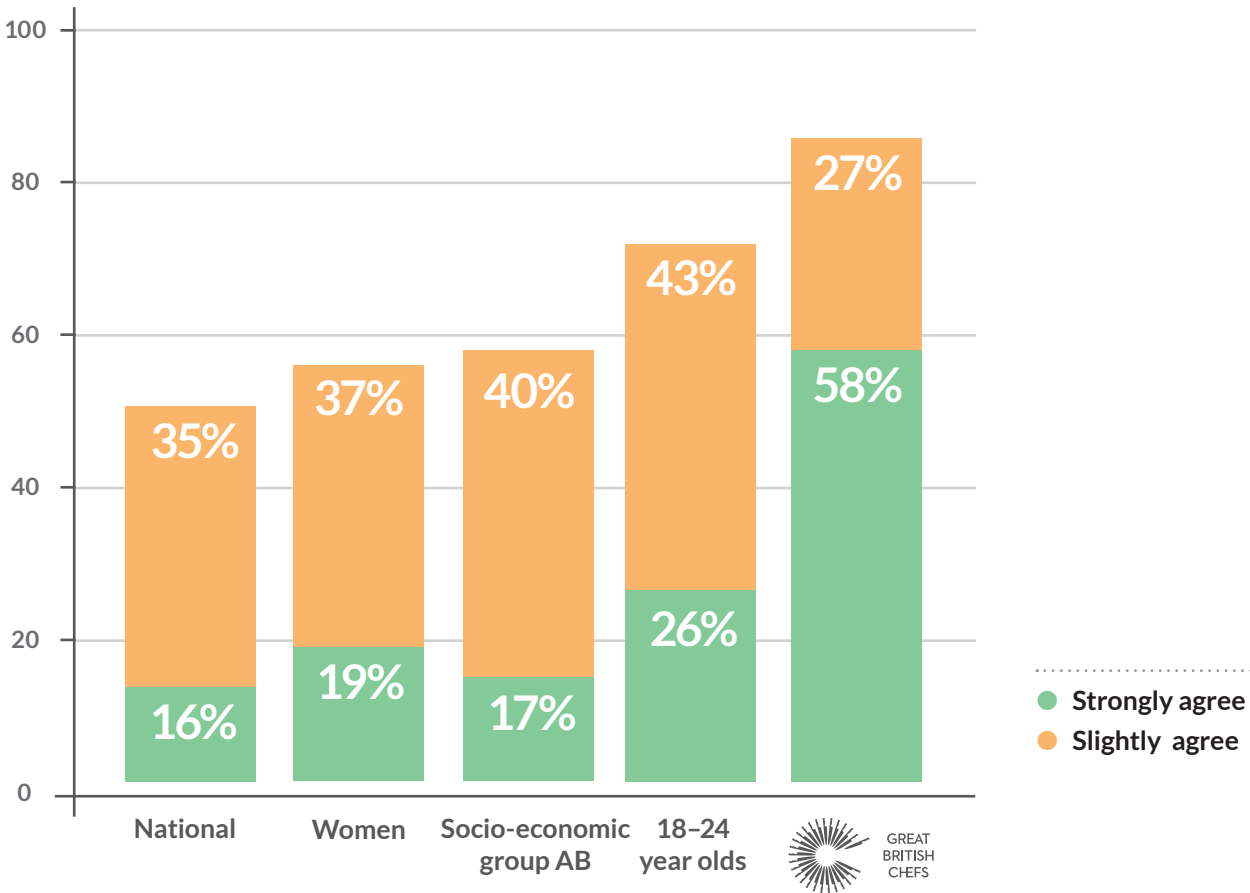
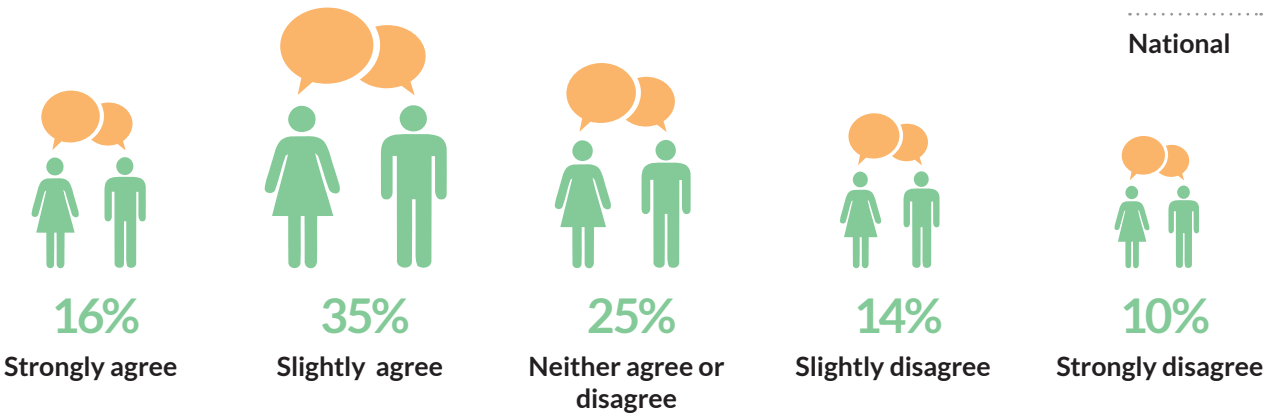


Question: To what extent do you agree with the following statement - Food is one of the great pleasures in my life

Talking food

Food is a major pre-occupation amongst the British public, with over 50% agreeing that they enjoy talking about food and what they are planning to eat. Women and younger consumers are the most likely to agree with this statement, with an impressive 68% of the 18-24s agreeing. Amongst Great British Chefs' foodie audience, agreement with this statement tops 85%.

Enjoy talking about food

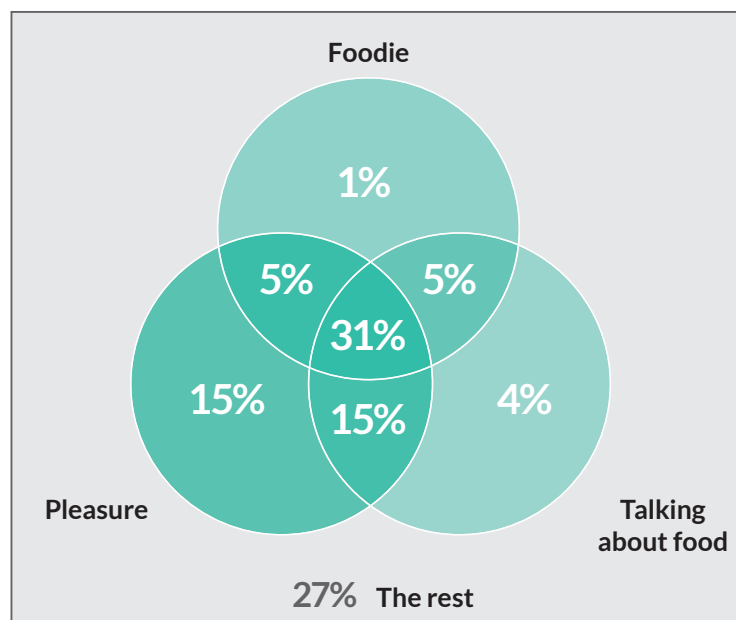


Question: To what extent do you agree with the following statement - I enjoy talking about food and planning what I am going to eat

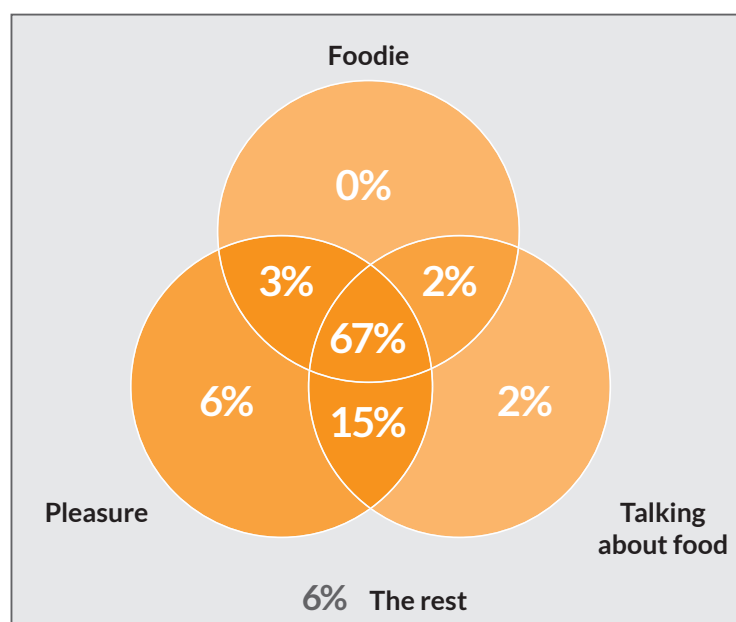
Foodies, food talk and pleasure

30% of people in the UK consider themselves foodies, enjoy talking about food and consider food one of the great pleasures of their lives - this represents one of the sweet spots for brands that have a great food story to tell. Within the Great British Chefs community almost 70% agree with all three statements.

National overlaps



Great British Chefs audience overlaps



Questions: To what extent do you agree with the following statements:

I would describe myself as a 'Foodie'

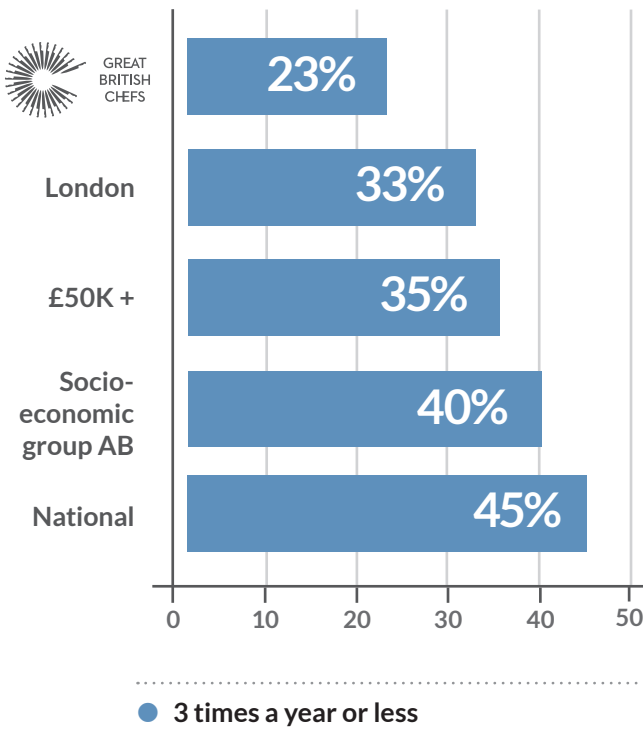
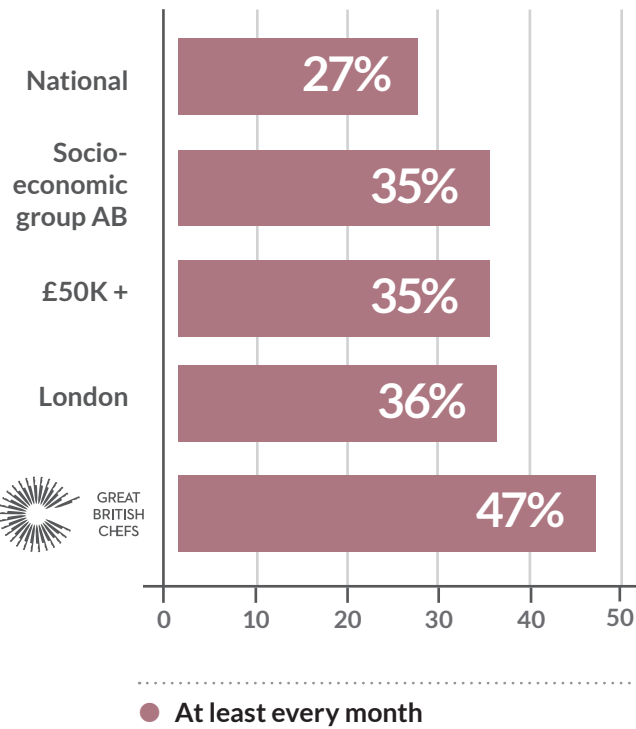
Food is one of the great pleasures in my life

I enjoy talking about food and planning what I am going to eat

Inviting people around

27% of Brits claim to invite their friends and family around every month and 7% claim to do it weekly. The most active groups are 25–34 year olds and those with kids under 10, with 34% claiming to invite friends and family over every month. Those with a higher income and in socio-economic group AB are also likely to entertain more often. Those who claim to ‘love cooking’ and Great British Chefs’ foodie audience are inviting people over the most frequently. At the other end of the spectrum, 45% of Brits claim to only invite friends and family round for a meal less than three times a year.

Enjoy talking about food

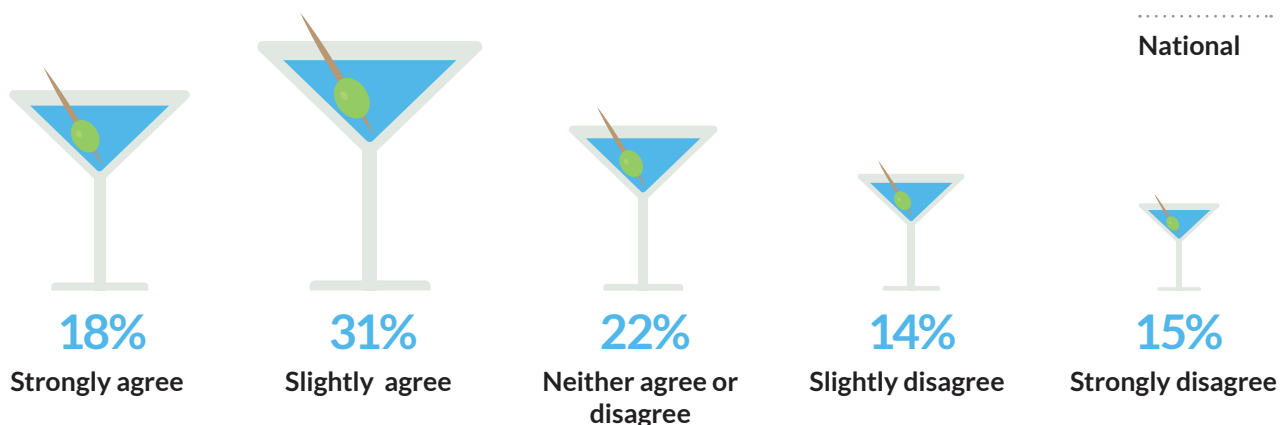


Question: Roughly how often do you invite friends and family to your home for a meal that you cook yourself?

Enjoyment of entertaining

The number of Brits who enjoy entertaining their friends and family at home outnumbers those that don't by a significant margin. Women are more likely to enjoy entertaining than men and over 50% of 18-24 year olds claim to enjoy entertaining. The more affluent groups are also more likely to enjoy entertaining than those on tighter budgets. Not surprisingly, almost 80% of Great British Chefs users claim to enjoy entertaining, with 55% very strongly agreeing with the statement.

Entertaining friends and family

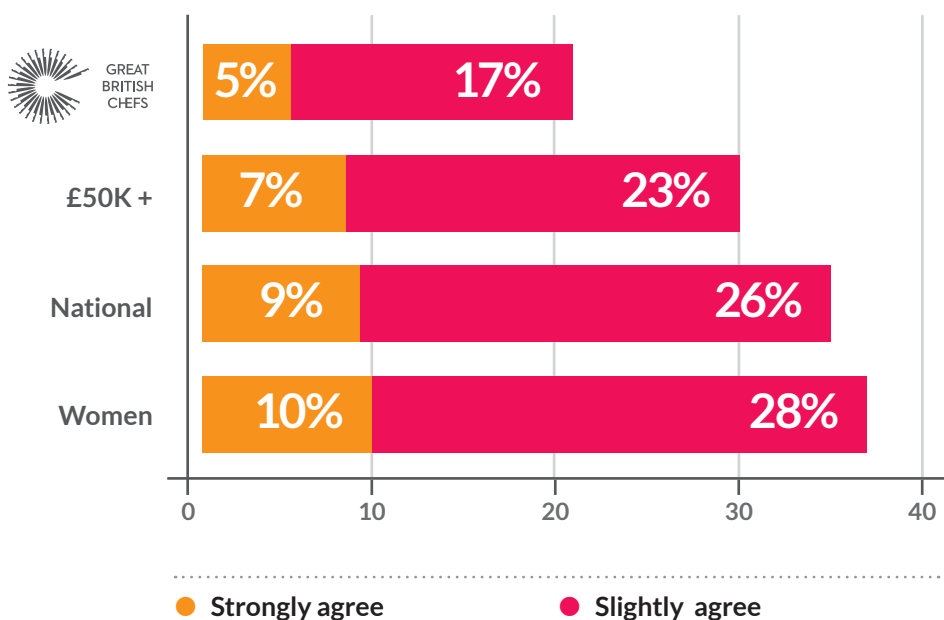
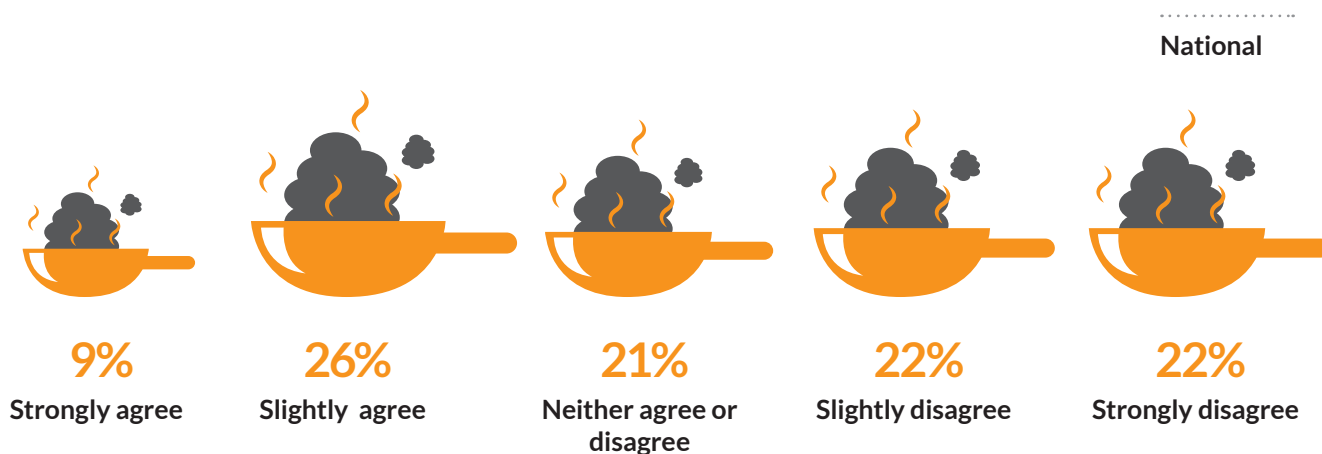


Question: To what extent do you agree with the following statement - I enjoy entertaining friends and family with meals at my home

Anxiety and cooking

While over 40% of Brits claim not to be anxious about cooking for others, over a third claim to be anxious about cooking for others. Anxiety increases amongst women and wealthy audiences don't appear to be much less anxious than the national average. Even amongst Great British chefs foodie audience, 22% agree with the statement 'Cooking for others makes me anxious'.

Cooking for others makes me anxious



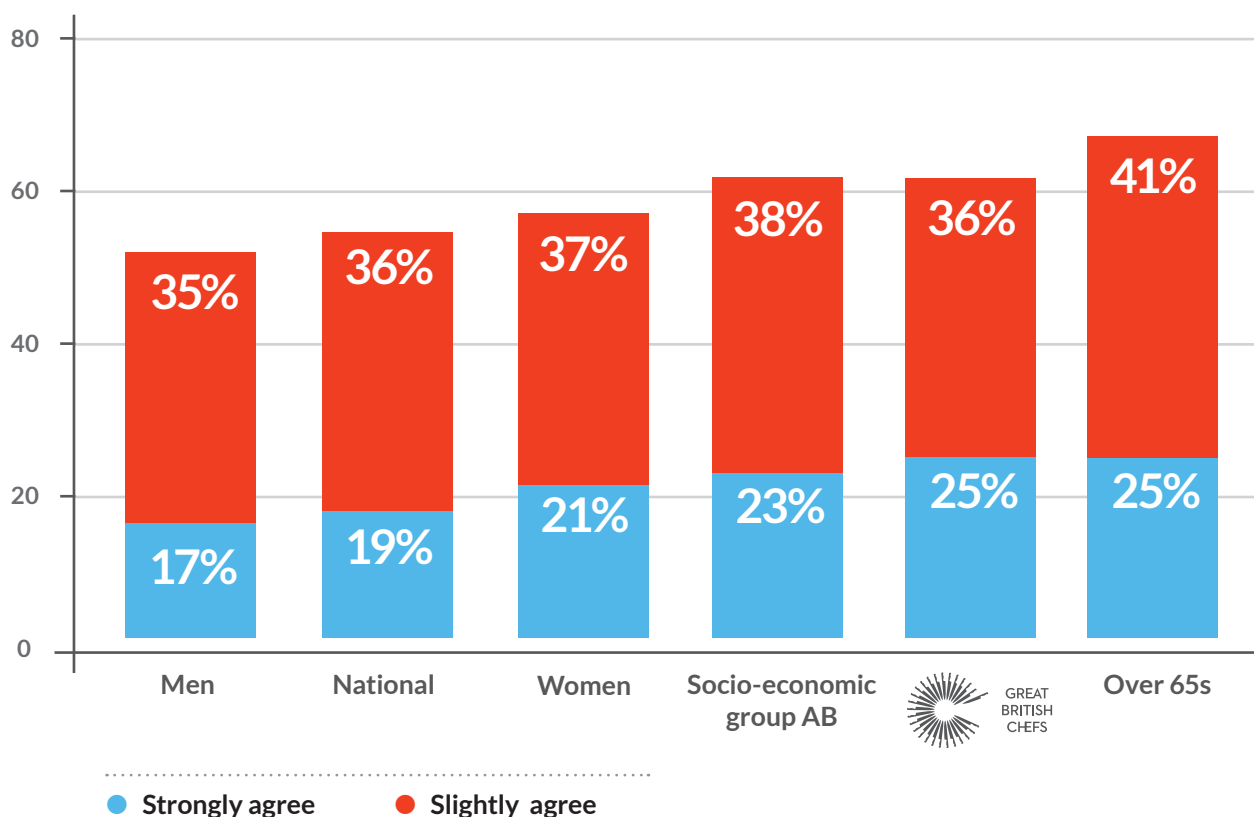
Question: To what extent do you agree with the following statement - Cooking for others makes me anxious

Food and health

Over 55% of Brits claim to be careful about what they are eating and seek to control their levels of sugar, salt and salt intake, while only 20% disagree with this statement. Women are more careful about what they are eating when compared with men, but not by a significant margin. While there aren't major differences between age groups, the over-65s seem the most concerned about what they are eating. Londoners and those in Northern Ireland seem the most careful while those in Wales and Scotland agree with this statement the least.



Question: I am careful about what I cook and eat; I control my sugar, fat and/or salt intake.



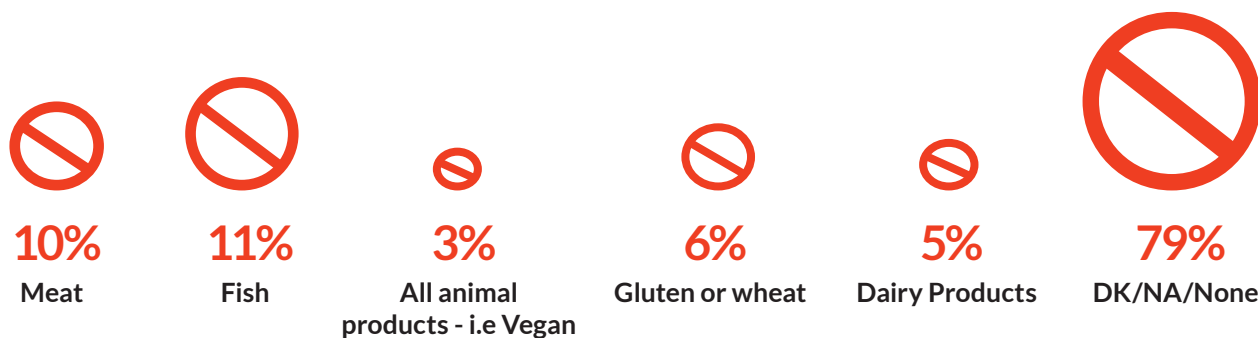
Question: To what extent do you agree with the following statement - I am careful about what I cook and eat; I control my sugar, fat and/or salt intake.


Avoiding various foods

More Brits avoid eating fish than meat, gluten, wheat or dairy. Avoidance of meat and fish doubles amongst those aged 18–24 to over 20% in both cases and is more prevalent in urban areas than rural ones. Almost 5% of Brits are now avoiding dairy and 3% of Brits are vegan. Across all categories, women are more likely to avoid meat, fish, gluten, dairy, wheat etc. than men.

What is being avoided?

National



	Meat	Fish	Vegan*	Gluten or wheat	Dairy Products	DK/NA/None
National	10%	11%	3%	6%	5%	70%
 GREAT BRITISH CHEFS	7%	6%	2%	5%	4%	83%
18–24 year olds	22%	25%	7%	11%	11%	57%
Women	12%	12%	4%	7%	7%	75%

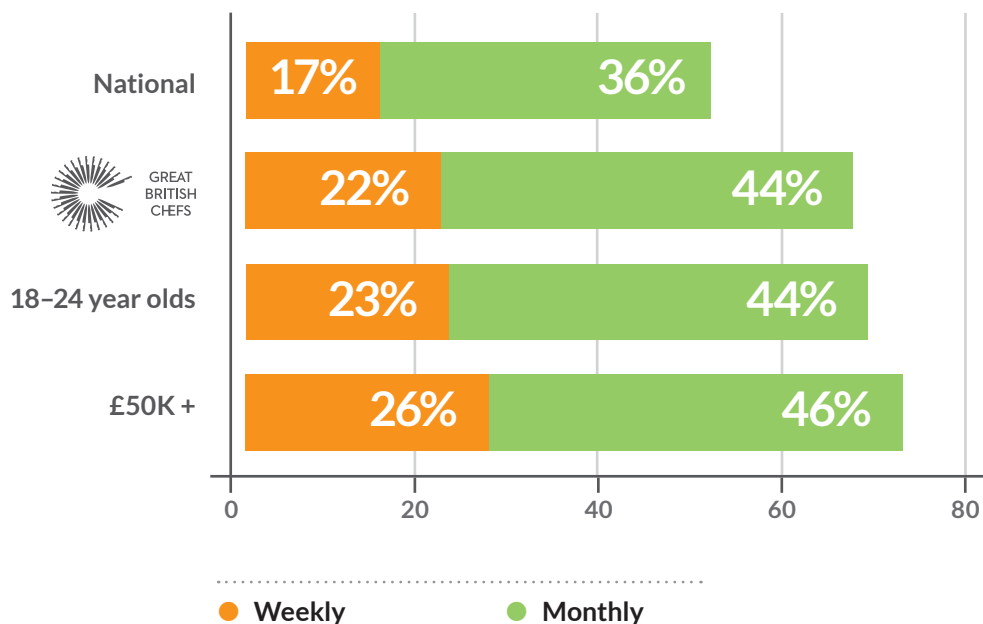
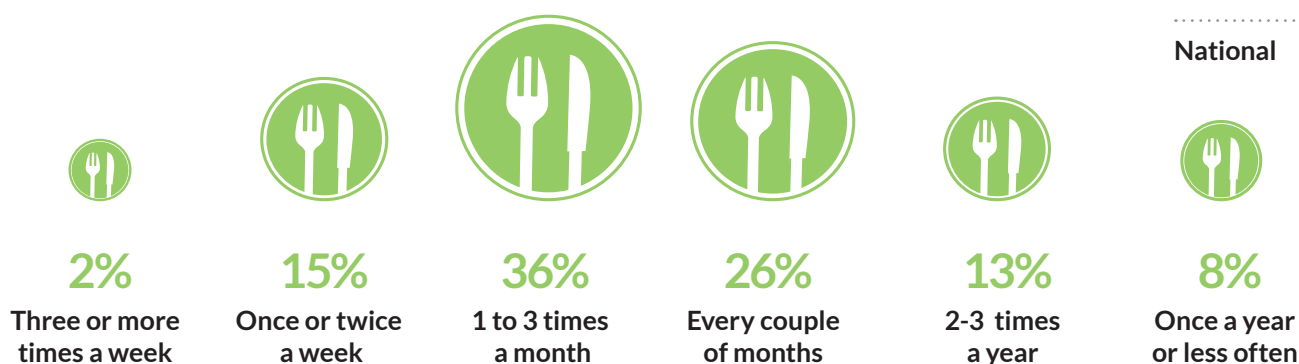
* Vegan defined as: All animal products - i.e Vegan.

Question: Do you avoid eating any of the following foods?

Out of home eating

53% of people in the UK eat out every month and a core group of 17% eat out every week. More wealthy consumers, Great British Chefs' audience and those living in London eat out far more frequently (65% every month) than the national average. The groups that eat out the most, however, are the younger groups (18-24 and 25-34) and in particular the 18-24 year olds. In addition, men are eating out more frequently (57% every month) than women (49% every month).

Eat in restaurants / pubs

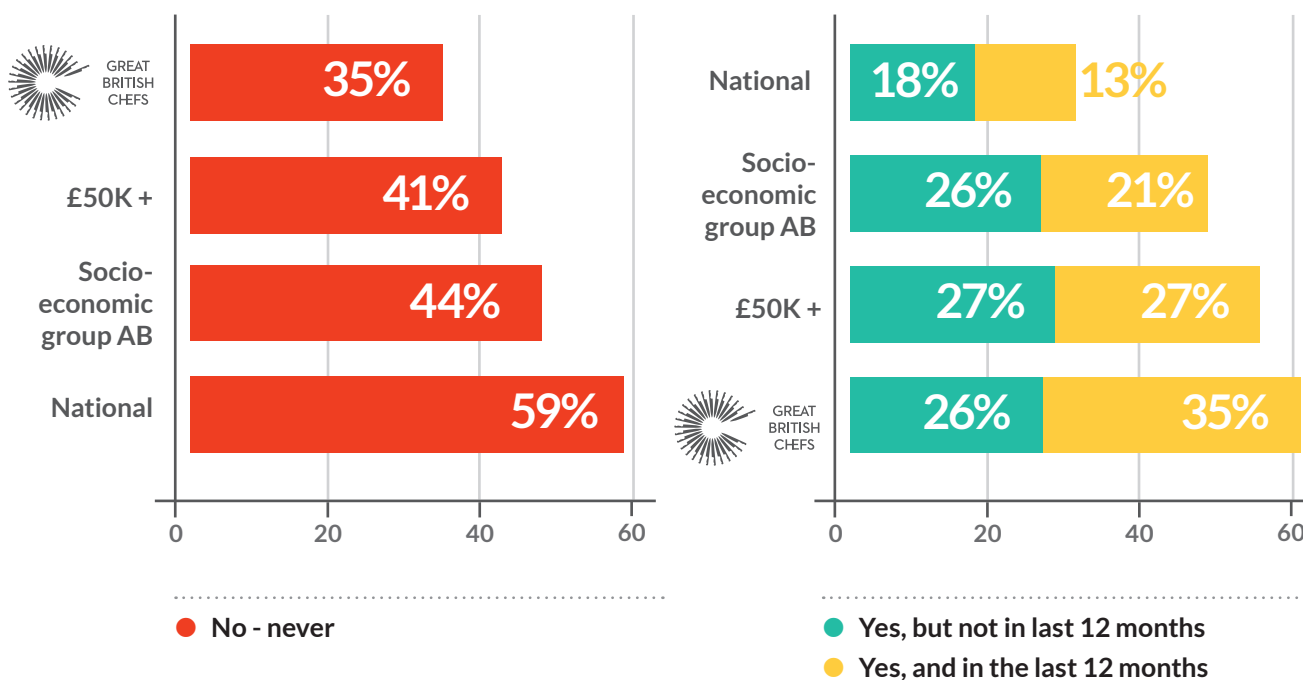
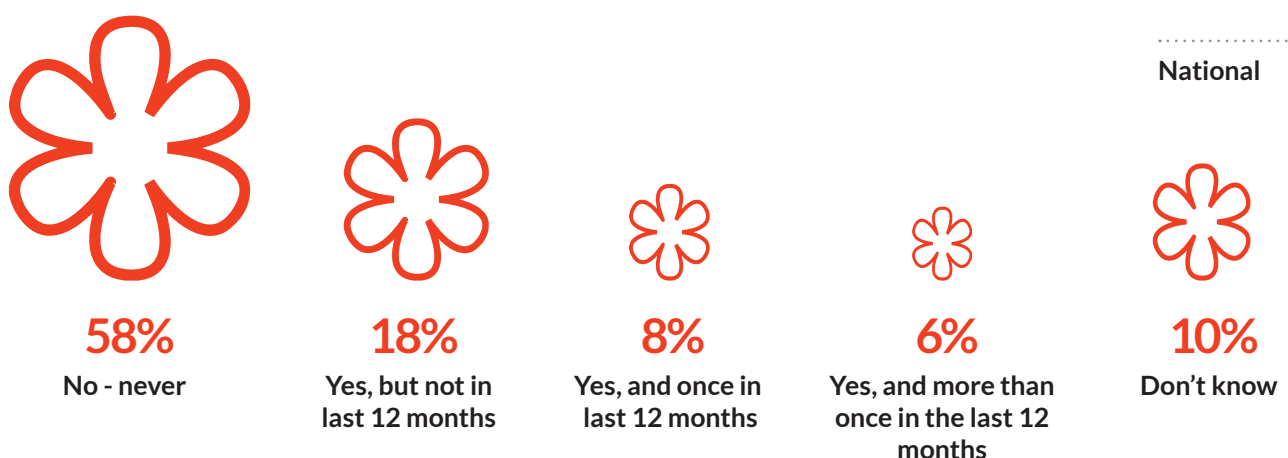


Question: Roughly how often do you eat out at a restaurant or a pub?

Michelin star dining

31% of Brits claim to have eaten in a restaurant with a Michelin star but only 13% have eaten in one in the last 12 months. Men are eating in Michelin star restaurants more than women and as expected London, with its 76 Michelin stars, is tempting more Londoners to eat Michelin-starred food than the rest of the country. Great British Chefs' foodie audience is also eating out at Michelin star restaurants (35% in the last year) in far greater numbers than the nationally representative and more upmarket groups.

Eating in Michelin star restaurants?

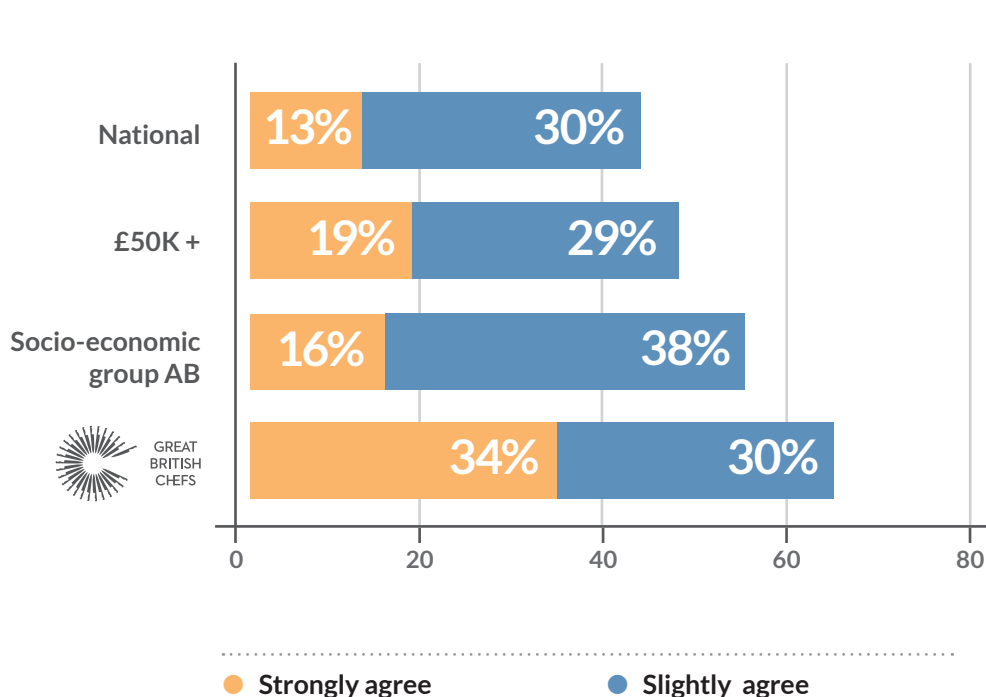
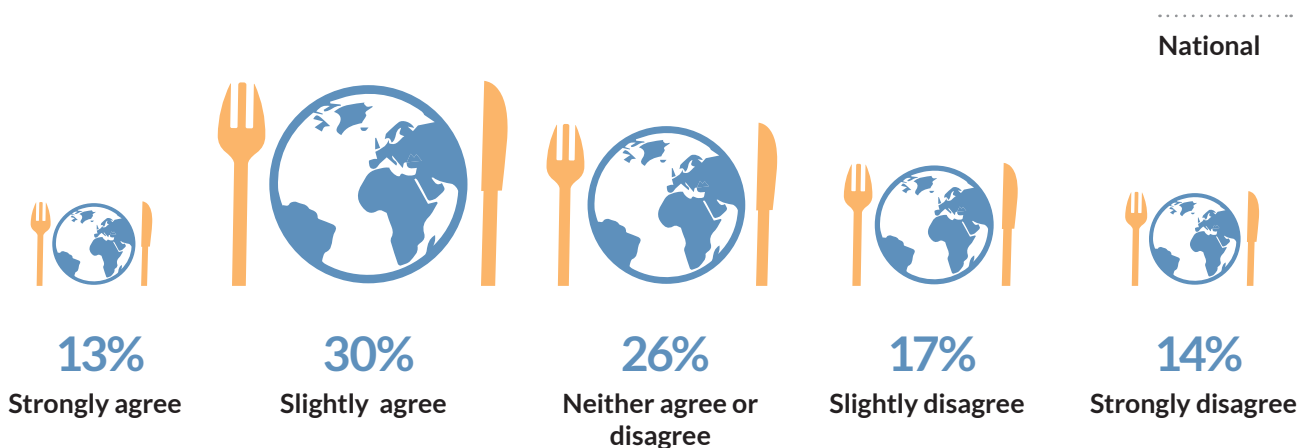


Question: Have you ever eaten in a Michelin star restaurant?

Food and travel

While 42% of Brits think that food is a very important factor in their choice of destinations, 30% disagree. Amongst more affluent groups (£50K+) the percentage of people who agree with this statement increases to 53% but amongst socio-economic group AB it only increases to 47%. Amongst Great British Chefs' foodie audience, 64% agree with the statement.

Food a very important factor in destination choice



Whilst the quality of food matters to more premium audiences, amongst Great British Chefs' foodies, the food story of a destination is very important and a key driver of choice. Destinations with great stories to tell have a unique opportunity to engage this audience with their stories.

Question: To what extent do you agree with the following statement - when planning my holidays, food is a very important factor in my choice of destination