GREAT BRITISH CHEFS

2019
A YEAR OF CHANGE

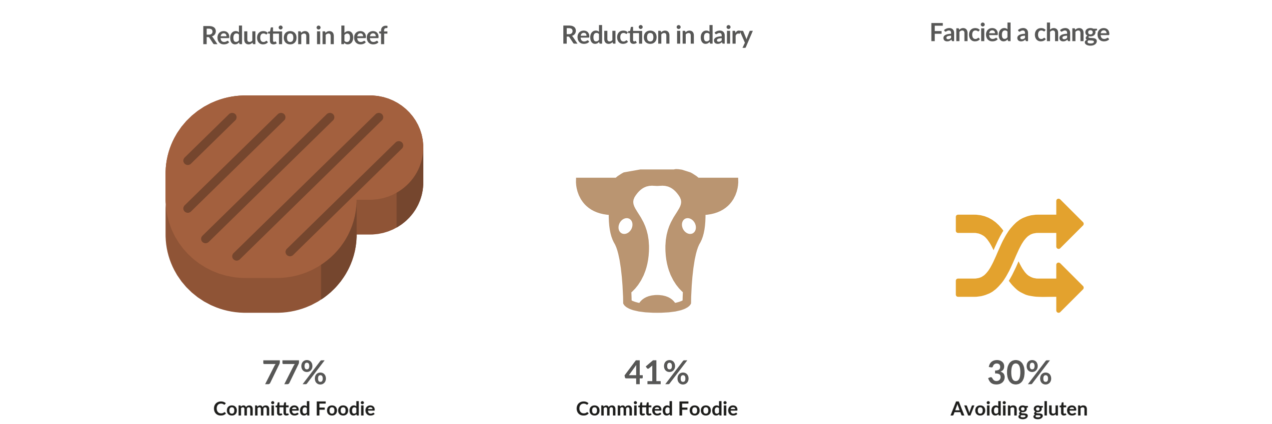
GREAT BRITISH CHEFS INSIGHT

A nation at boiling point

In April 2017, Great British Chefs started a journey to truly understand the changing culinary landscape of Britain with a particular focus on the 'foodie', an as then undefined character who was broadly misunderstood. Since then, we have asked consumers to complete 35,059 surveys and answer over two million questions, giving us a very nuanced understanding of Britain's 13 million foodies. We then divide the people we survey into three segments: 'Committed Foodies', 'Weekend Foodies' and 'Non-Foodies', that we develop detailed profiles around. We use our research to ensure all of Great British Chefs' content is best in class and that the brands we partner with can optimise their campaigns, delivering the best ROI possible through enhanced audience understanding.

In January 2019, we ran our largest ever survey with a nationally representative panel of 4,000 people via SSI/Research Now (who have recently rebranded as Dynata) and an additional sample of 5,417 Great British Chefs users. In the survey, we returned to a number of themes we previously examined to see how habits and attitudes are changing, as well as exploring some new areas which we and our brand partners wanted to understand more deeply. This has given us a unique and highly robust data set, from which we have identified a number of actionable insights for brands – some of which are included in this paper.

Against the current backdrop of political uncertainty, it is clear that the world of food is also in a state of upheaval. Much has been made of the growing plant-based revolution and, while the absolute numbers of strict vegans and vegetarians remain small, more and more people are reducing their consumption of animal products, particularly red meat and, more recently, dairy. In general, meat, dairy and wheat are being avoided for a range of reasons that are mainly lifestyle-related. The demand for vegan and vegetarian products is clearly going to continue growing rapidly, driven predominantly by foodies. However, for brands looking to expand beyond the core strict vegan/vegetarian market, it is vital to understand that a vegan or vegetarian product is not a benefit in itself to foodies. There are a number of key motivators that take priority over whether something is deemed 'ethical' or not when it comes to purchasing food and drink products.

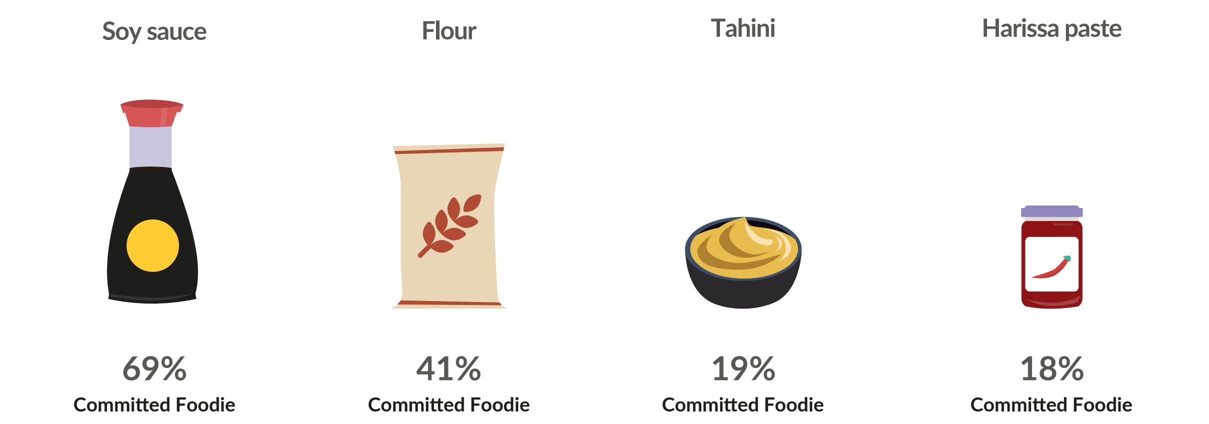


SOURCE: *January 2019 National Survey (SSI)*

We have also explored the drivers of recipe choice at different occasions and among different segments of the population. Brands often optimise their content around being simple and easy, when in reality the majority of foodies are looking for other things. During the week foodies want recipes that are healthy, flavoursome and enjoyable to cook, and on the weekends they value excitement and external family validation.

We have mapped these recipe drivers against how consumers perceive a chosen set of twelve international cuisines, in order to understand how each cuisine aligns with different audience segments and when they are most likely to be cooked. The sad truth is that almost 50% of Non-Foodies don't cook any international cuisines (that we included in the survey) at home regularly and are not a worthy target for international brands. International cuisine brands need to understand the perceived strengths and weaknesses of their cuisine and use this insight to help establish who to target and with what message – otherwise, much of their marketing will be wasted.

The store cupboards of Britain, particularly those owned by Committed Foodies, continue to groan under a growing weight of international sauces, grains, spices, specialist noodles and pastes. For the first time we also looked into the world of drinks cupboards and which cocktails people are making. It comes as no surprise that Brits are reaching for a gin and tonic more regularly than any other cocktail and, considering how much gin is made in Britain, regardless of whatever happens with Brexit we should be able to keep this habit up.



SOURCE: *January 2019 National Survey (SSI)*

At a point in time when consumer dissatisfaction with the government is at an all-time high (according to Edelman's Trust Barometer), it is essential that brands seek to understand their consumers' needs and motivations. People want businesses and brands to step up and fill a void currently left by the government; something that provides a unique opportunity at a critical time. For foodies, very little is more important and personal than their food choices, and they will reward the brands that understand them, meet their needs, talk their language and earn their trust.

The report that follows contains lots of data and insights that should help brands engage Britain's foodies, but much of the data and insight we have collected is only shared with our brand partners. If you would like to hear more about how we work with brands and understand how we are helping them to win in market, please do get in touch.

Ollie Lloyd
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The segments

The people we surveyed have been categorised into three segments: ‘Committed Foodies’, ‘Weekend Foodies’ and ‘Non-Foodies’ (or ‘Home Cooks’ as we called them in our 2017/8 research). People are sorted into these three categories depending on how strongly they agreed with the 10 food-related statements below. As such, someone would need to strongly agree with at least five statements to qualify as a Committed Foodie, whereas a Weekend Foodie would need to strongly agree with three or four statements.

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

My friends expect me to know about the latest food trends

I would describe myself as a ‘Foodie’

I enjoy entertaining friends and family with meals at my home

I spend a lot of time preparing food

I like to try out new recipes

I am happy to pay a bit extra for quality food products

I enjoy finding and buying unusual ingredients

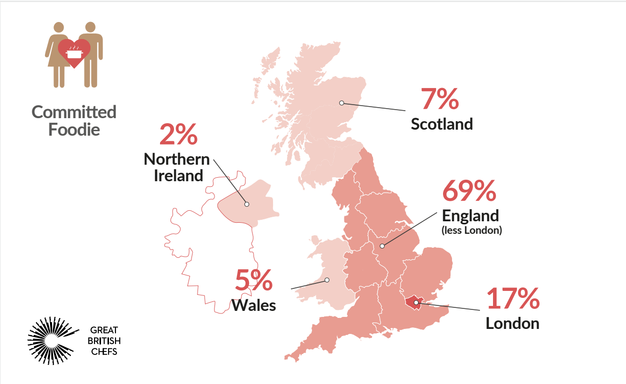
I’m interested in where the ingredients I buy come from

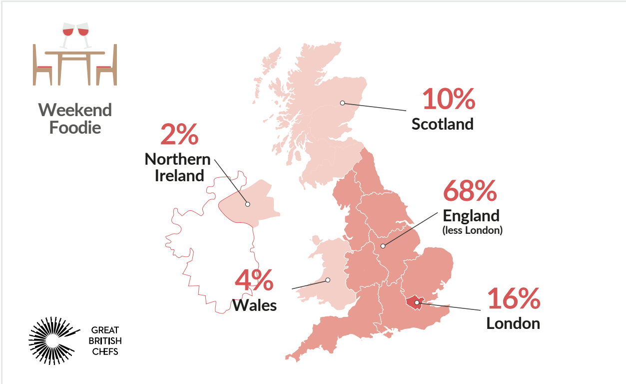
I enjoy trying gourmet food in expensive restaurants

In 2018, we changed our approach to categorising people by tightening the qualification criteria. This was in response to the growing number of people who agreed with two statements, which in our view would have expanded the foodie population disproportionately from 32% to 40% of the UK. By raising the criteria, the number of foodies in the UK has stayed broadly stable. In our 2019 research, the number of people we consider to be foodies was 13 million, a minor change and in line with expected margins of error, versus 13.6 million in 2018.

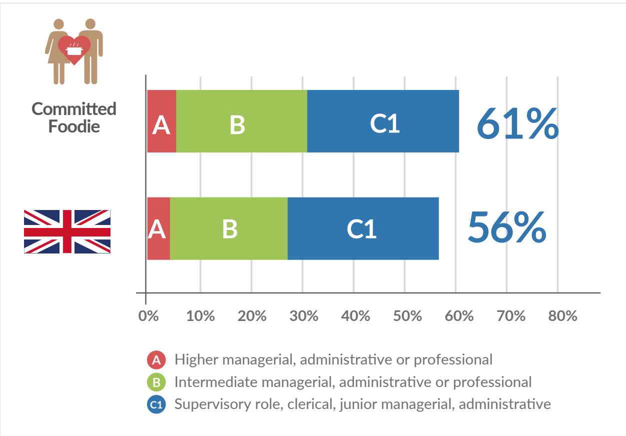
18-74 years old	Strongly agree with 5+ statements	16%	7.3m
	Weekend Foodie: Strongly agree with 3 - 4 statements	13%	5.7m
	Non-Foodie: Strongly agree with 2 statements or less	71%	32m

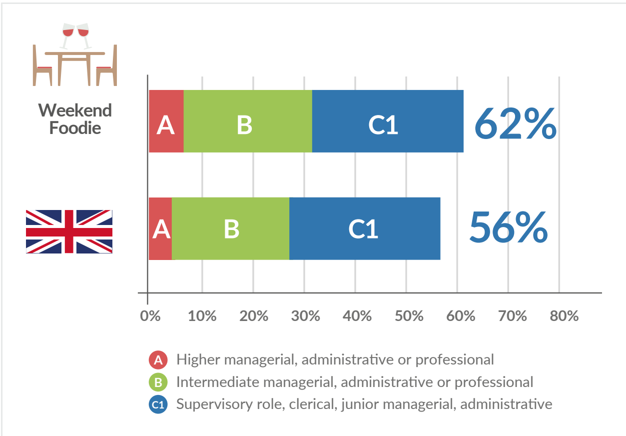
As witnessed in research we carried out in 2017 and 2018, the reality that foodies are based across Britain remains constant. For brands trying to reach Committed and Weekend Foodies, only a national approach will allow them to reach their potential, as the majority are based outside London.



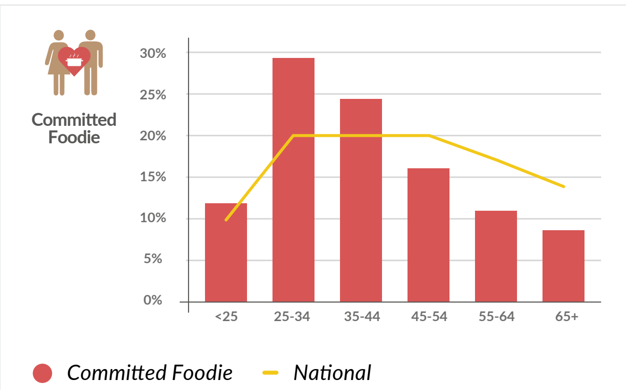


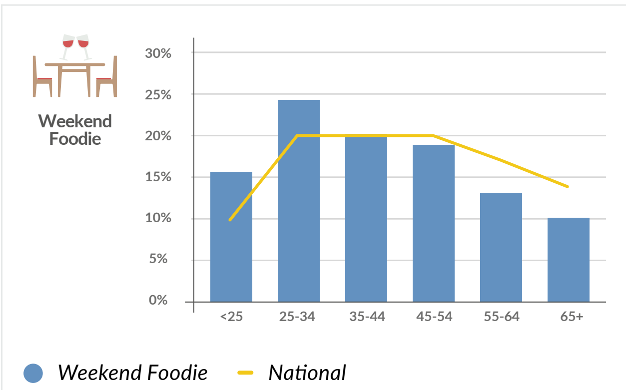
While socio-economic factors have some influence over a person's food choices and which foodie statements they agree with, it is clear that foodies are not defined by socio-economic status, even if they are slightly above the national average. When food is a passion, people are prepared to spend a bit more to get premium products and ingredients. Consumers do not spend rationally when they love something, and foodies love food.





The largest group of Committed Foodies (29%) and Weekend Foodies (24%) from an age perspective is the 25–34 year olds, a generation that has truly lived through Britain's food revolution. The way we approach food has now become part of our identity, and while different age groups have very different views of food, foodies are united across age segments.





SOURCE: *January 2019 National Survey (SSI)*

Brand and category purchasing

When looking at the purchasing behaviour of Committed Foodies and Weekend Foodies, it is clear that they are prepared to pay for quality above and beyond all other groups. This makes both of these groups (particularly the Committed Foodie) a key target for premium brands.

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

Strongly agree

SOURCE: *January 2019 National Survey (SSI)*

Committed Foodies buy brands

If we look at some key categories that have both significant retailer presence and are spending heavily on promotion, it is once again clear that foodies buy branded offerings more than Non-Foodies. However, in most categories, it is also the case that only 50% of foodies buy a branded offering, so while they over-index significantly there remains a large upside for growth.

Question: When thinking about the following categories, what do you normally purchase? - Branded products

	Pasta	Tinned tomatoes	Soy sauce	Spices	Rice	Butter	Eggs	Flour
Non-Foodie	24%	27%	47%	45%	36%	52%	22%	25%
Committed Foodie	44%	47%	69%	60%	55%	65%	37%	41%

SOURCE: *January 2019 National Survey (SSI)*

This translates into brand purchasing and often loyalty, particularly for brands that have committed themselves to delivering quality products and communicating intelligently with these audiences.

Shopping habits

Including foodies, Tesco remains the destination of choice for everyone, but it is Waitrose that over-indexes significantly for the foodie shopper. Aldi and Lidl's offering has also been embraced by foodies, with 41% of Committed Foodies shopping at Aldi regularly (versus 31% of Brits). Over a third of Committed Foodies regularly shop online for food, a significant over-index versus the Non-Foodies, of whom only 17% regularly shop online for food. Foodies also shop significantly more regularly at independently owned shops (e.g. cheesemongers, butchers and farm shops) than the average Non-Foodie, but we have seen a decline in the frequency of shopping through these channels.

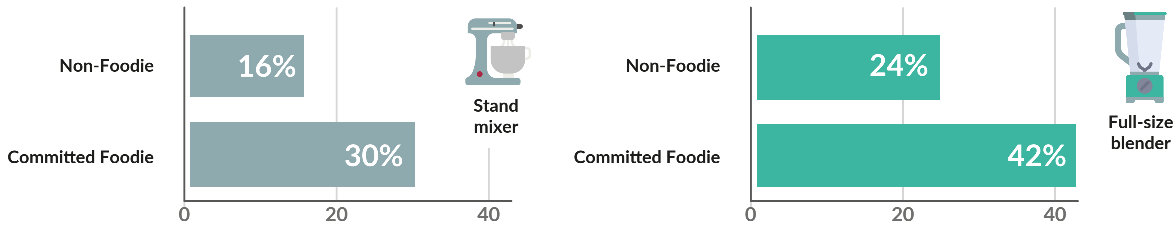
Question: How often do you shop at the following grocery chains?

SOURCE: *January 2019 National Survey (SSI)*

Equipment ownership

As has been seen in the world of ingredients, foodies are investing to fuel their passion by buying a wide range of equipment and are a far easier conversion target for brands. Committed Foodies in particular have a broad range of items and are very happy to buy anything from bread makers (24%) and blowtorches (11%) to ice cream makers (16%) – in all cases this is over twice as much as the Non-Foodie. They also have increasingly modern kitchens with steam ovens (11%), induction hobs (17%) and even instant hot water taps (8%).

Question: Which of the following kitchen appliances do you currently have in your kitchen?



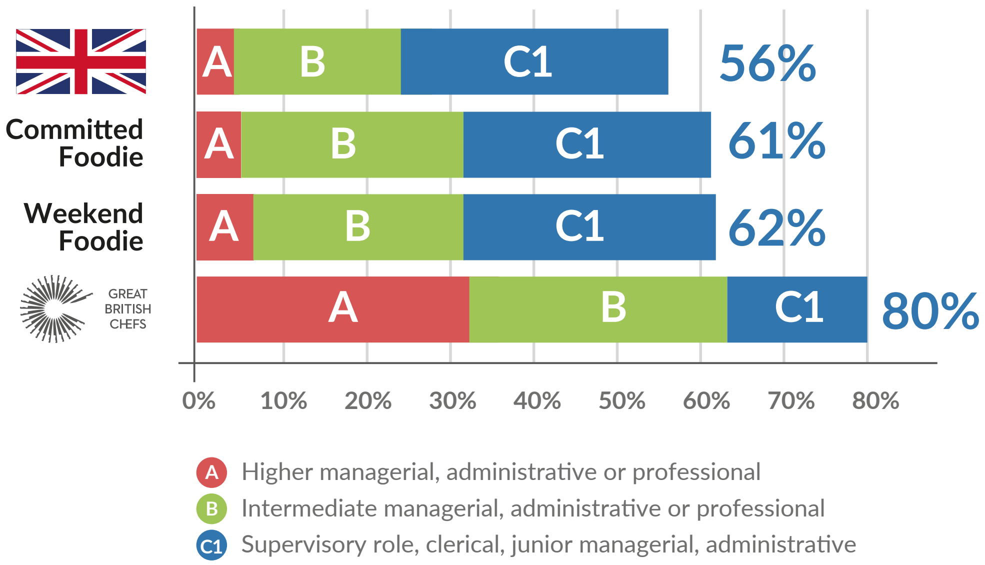
SOURCE: *January 2019 National Survey (SSI)*

Great British Chefs

We also conducted our 2019 survey with the Great British Chefs audience, collecting 5,417 responses. This sample was then weighted to reflect the age and gender profile of our website traffic (according to Google Analytics) and compared against the national segmentation. This helped us to understand the profile of our audience, which is increasingly made up of Committed Foodies, even more so in 2019 than in 2018.

	18–74 years old	GREAT BRITISH CHEFS
Committed Foodie	16%	66%
Weekend Foodie	13%	15%
Non-Foodie	71%	19%

The Great British Chefs audience is significantly more premium than the national foodie segments. Our users are more experimental, cook a wider range of dishes, own more equipment and are prepared to invest in quality. All of this makes our audience particularly interested in the right premium brands.

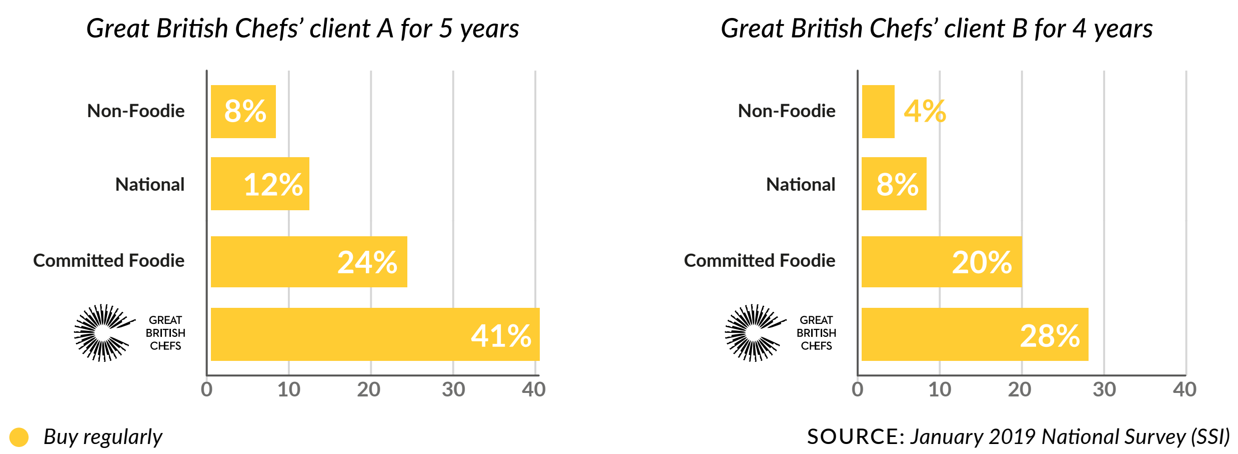


SOURCE: *January 2019 National Survey (SSI)*

Working with brands

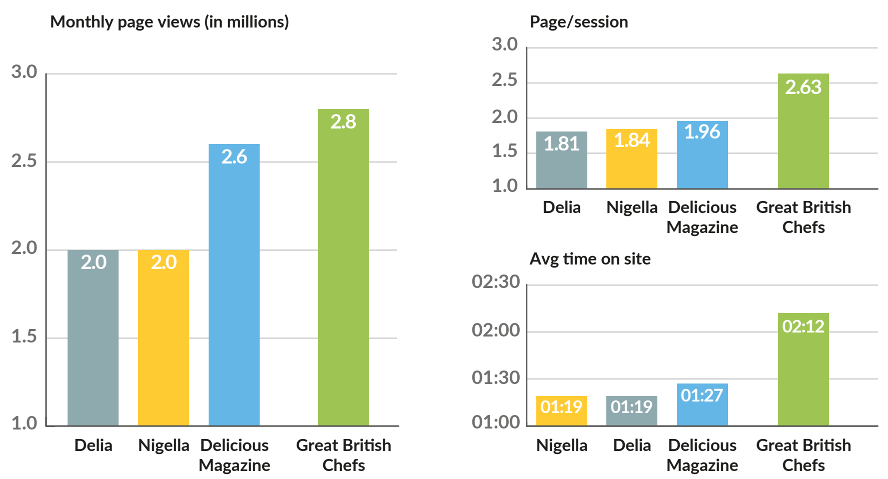
As a business, we work directly with brands to help them win by giving them the insight and advice they need to engage Britain's premium foodies. No other publication or agency has our depth of knowledge into Britain's foodies or the ability to reach and engage the most valuable of these consumers.

For our brand partners, we develop integrated campaigns that include authoritative inspirational content and a combination of media, social outreach and events. We pride ourselves on being able to consistently show the impact of campaigns, as our audience buys significantly more of our brand partners' products than the comparative national foodie segments.



SOURCE: *January 2019 National Survey (SSI)*

Great British Chefs is a true digital brand, and we invest our time and resources in delivering the right content on the right platform to our rapidly growing community of foodies. In 2018, we received over 20 million visits to our site from 12 million unique visitors, an increase of over 11% versus the previous year. The quality of our content and the performance of our website means that our audience is more engaged, helping to deliver improved ROI for our brand partners.



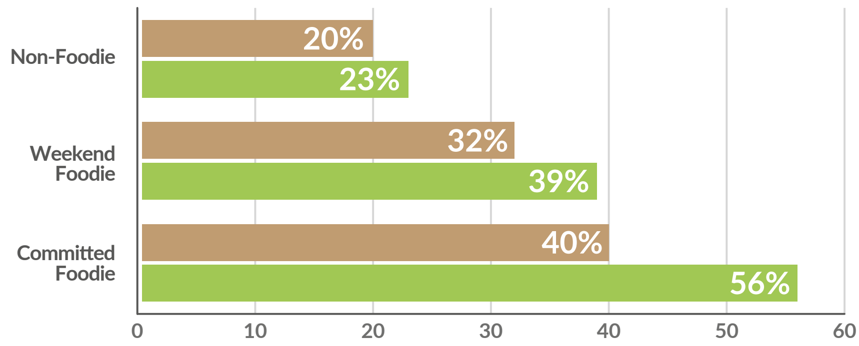
SOURCE: *SimilarWeb (July 2018)*

If you would like to hear more about our approach, our deep insight into Britain's 13 million foodies or our case studies, please get in touch via james.darby@greatbritishchefs.com

The growing plant-based revolution

From Veganuary to meat-free Mondays, more and more people are trying to follow more of a plant-based diet. This revolution is being led by women (35% agree) more than men (26% agree), clearly resonates with younger people and is more common amongst affluent British consumers. However, as we have often seen, it is the Committed Foodies who are leading the charge, with almost 60% of them claiming to be trying to adopt a more plant-based diet. It seems we are heading to a place where meat and two veg is an outdated relic of the past.

Question: Which of the following statements do you agree with?
I am trying to follow more of a plant-based diet nowadays (Data shown for 'Strongly agree' and 'Slightly agree')



January 2018 *January 2019*

SOURCE: *January 2018/2019 National Survey (SSI)*

As would be expected, this has a direct impact on meat consumption. Increasingly over the last year, we have seen Brits claiming to reduce their red meat consumption by a significant margin, even impacting meats like venison, claimed by some to be the most 'healthy' and sustainable of the lot. There are a number of factors potentially influencing people's purchasing habits, including increasing food prices, safety concerns, healthy eating trends, the environment and the ongoing media focus around veganism. The inescapable reality is that the plant revolution is gaining pace, meat consumption is down and that brands hoping to engage British consumers and foodies must be able to help facilitate this move towards a more plant-based diet.

Question: Which of the following have you cooked in the last 6 months?

Beef	Non-Foodie	Committed Foodie
January 2018	74%	82%
January 2019	69%	77%

Lamb	Non-Foodie	Committed Foodie
January 2018	54%	71%
January 2019	47%	66%

SOURCE: *January 2018/2019 National Survey (SSI)*

These trends are also directly impacting shopping habits, as we are seeing a decline in claimed visits to butchers and farmers' markets. According to the Office of National Statistics, in 1990 there were 15,000 butchers in the UK. Today, this number has declined to just 5,380, and over 100 are closing each year without being replaced. Because these kinds of independent establishments have in many cases become more premium and are targeted towards foodies, these dynamics should be a major cause for concern.

Question: How often do you shop at the following? - Butcher; - Farm shop;
(Data shown is for 'Regularly')

Butchers	Non-Foodie	Committed Foodie
January 2018	14%	44%
January 2019	12%	38%

Farm shop	Non-Foodie	Committed Foodie
January 2018	7%	31%
January 2019	6%	27%

SOURCE: *January 2018/2019 National Survey (SSI)*

However, this trend also presents clear opportunities for growth. So far, vegetable boxes are a good example of a product that has failed to find a way to capitalise on this trend. The number of people purchasing them has remained stubbornly flat (5% purchasing regularly and 9% occasionally) over the last year, despite continued investment from the leading brands (e.g. Riverford or Abel and Cole). On the other hand, grains are benefiting from these changes as we have seen an increase of all key grains in British store cupboards, particularly those of foodies.

Interestingly, according to Mintel the UK took the top spot in Europe for vegan New Product Development launches in 2018. Particularly with Unilever's acquisition of The Vegetarian Butcher and the launch of Beyond Meat in UK supermarkets, this space is going to get more competitive. This will put pressure on retailer brand offerings and historical market leaders like Quorn, who until now have done a good job of attracting foodies.

Question: Which of the following ingredients do you normally have in your store cupboard?

Non-Foodie	Basmati rice	Brown rice	Whole wheat pasta
January 2019	52%	30%	31%
± Change vs July 2018	+5%	+3%	+4%

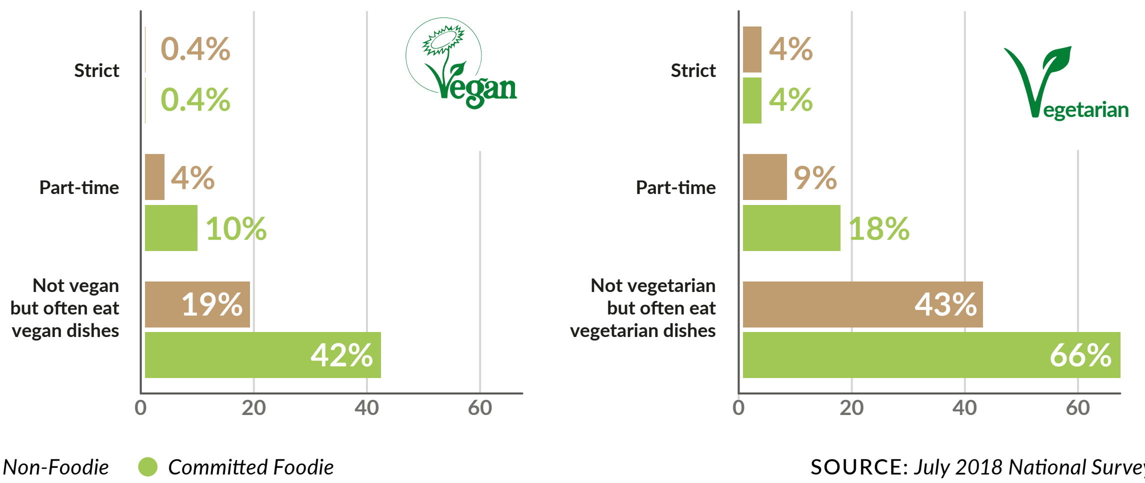
Committed Foodie	Basmati rice	Brown rice	Whole wheat pasta
January 2019	72%	57%	52%
± Change vs July 2018	+3%	+5%	+8%

SOURCE: *July 2018/January 2019 National Survey (SSI)*

New frontiers: dairy and wheat

In 2018, it became clear that a large cohort of people were happy to eat vegan and vegetarian dishes, even if the absolute number of strict vegans and vegetarians remained small. While much has been made of the subsequent impact on meat reduction, this impact is spreading into new categories, as we are now seeing people actively trying to reduce the amount of dairy and wheat in their diets.

Question: Which of the following statements do you agree with? - I am strictly vegan; - I am a part-time vegan; - While I am not a vegan, I often eat vegan dishes; - I am strictly vegetarian; - I am a part-time vegetarian; - While I am not a vegetarian, I often eat vegetarian dishes (Data shown is for 'Agree')



SOURCE: *July 2018 National Survey (SSI)*

As is often the case, although the trends are the same for both categories, there are opposing views at play in the lands of dairy and wheat. While a sizable minority of Brits claim they are now trying to reduce dairy or gluten in their diets, this doesn't mean that these products are now considered 'bad'. The reality remains that a majority consider dairy and wheat to be part of a healthy diet, even if they are still trying to reduce their consumption. As we have often seen, this trend is being led by foodies rather than younger or urban audiences, which are so often wrongly the consumer focus for brands.

Questions: Thinking of your dairy consumption, which of the following do you agree with? (Data shown is for 'Agree')

	Non-Foodie	25-34 years old	Committed Foodie
I am trying to reduce the amount of dairy products in my diet	23%	35%	41%
I consider consuming dairy to be part of a healthy and balanced diet	84%	81%	88%

SOURCE: *January 2019 National Survey (SSI)*

In the survey, we explored a wide range of reasons for what was driving people to reduce their consumption of gluten and dairy. Nationally, the most common reasons to avoid gluten and dairy are lifestyle-based instead of medical or ethical. The narrative that seems to have formed is around the benefits of removing certain foodstuffs (like dairy) from one's diet, and that this is thought of as being 'better for you'. However, the fact that 16% of those reducing dairy consumption cited animal welfare concerns shows that campaigns from organisations like PETA (People for the Ethical Treatment of Animals) are having an impact.

Questions: Why have you decided to reduce or eliminate dairy from your diet?; Why have you decided to reduce or eliminate gluten and wheat from your diet? (Data shown for National)

Avoiding dairy	28% I avoid dairy as part of a healthier diet	26% I avoid dairy products to lose weight	16% I am concerned about the impact of dairy production on animal welfare
Avoiding gluten	30% I fancied a change	28% I avoid gluten and wheat to lose weight	25% I avoid gluten or wheat as part of a healthier diet

SOURCE: *January 2019 National Survey (SSI)*

For those avoiding dairy, milk is one of the key products people claim to be trying to reduce. It's therefore strange that non-dairy 'milks' don't seem to be gaining in popularity. Despite significant investment by brands like Oatly in ad spend and increases in their distribution, the purchase rate remains flat nationally, with gains amongst the younger audiences being offset by losses with other segments. The reality is that the wider opportunity is currently being missed by the brands in this space, as their tone and messages aren't well aligned with consumer motivations.

Questions: Which of the following do you purchase for home consumption?

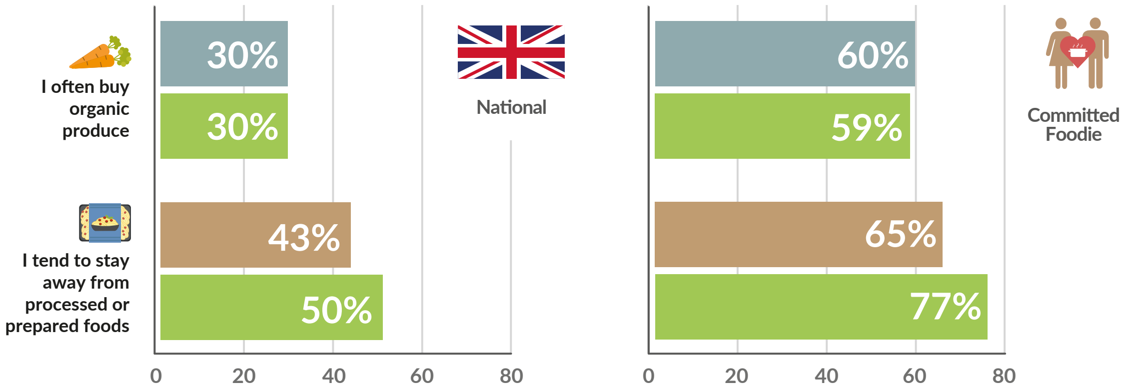
	Soya milk	Almond milk	Oat milk	Rice milk
Committed Foodie	28%	32%	15%	14%
Non-Foodie	12%	13%	5%	4%
Weekend Foodie	21%	29%	9%	8%
Under 25 years old	21%	24%	14%	11%

SOURCE: *January 2019 National Survey (SSI)*

Specialism

As we have seen, the average Brit's food requirements are becoming increasingly particular, maybe even fussy, if you are not engaged in the world of food. Alongside their desire to eat less meat, dairy and wheat they are increasingly avoiding processed foods. Interestingly, while organic produce is now relatively mainstream, it hasn't been gaining popularity.

Questions: To what extent do you agree or disagree with the following statements?
- I tend to stay away from processed or prepared foods; - I often buy organic produce
(Data shown for 'Strongly agree' and 'Slightly agree')

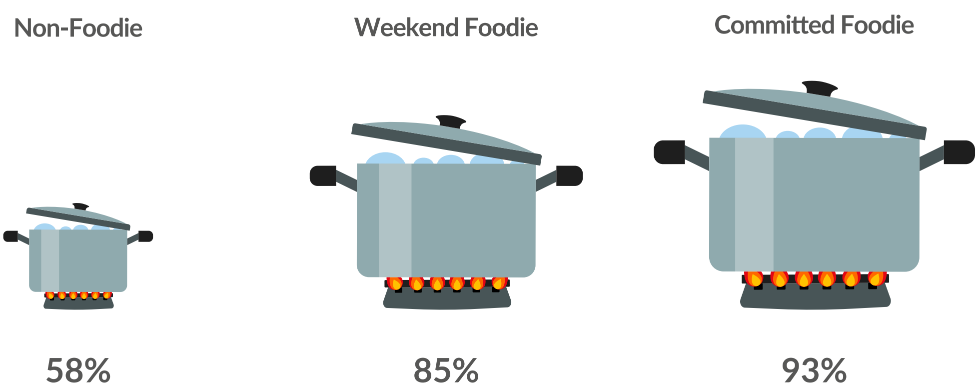


April 2017 *January 2018* *January 2019*

SOURCE: *April 2017, January 2018/2019 National Survey (SSI)*

All of this should be translating into more foodies making items themselves, be that jam, bread or even pickling vegetables. However, the reality is that the number of Committed Foodies who have made bread (46%), jam (30%) or pickled (24%) in the last year remains flat versus 2018. Nevertheless, the broader trend of trying new recipes and cooking from scratch is gaining in popularity and is closely associated a desire to make a healthier choice.

Questions: To what extent do you agree or disagree with the following statements?
- I cook from scratch as I think it is healthier
(Data shown for 'Strongly agree' and 'Slightly agree')



SOURCE: *January 2019 National Survey (SSI)*

Britain's store cupboards are becoming increasingly diverse, with a growing range of international items present. Asian cooking staples like coconut milk, coconut oil and egg noodles are now found in almost half of Committed Foodie homes. Middle Eastern classics like harissa, tahini, preserved lemons and pomegranate molasses are gaining in popularity and are found in more and more Committed Foodies' store cupboards. Alongside this, the likes of miso, nori seaweed, oyster sauce and udon noodles are gaining in popularity.

Question: Which of the following ingredients do you normally have in your store cupboard?
(Data shown for Committed Foodie)

	Harissa paste	Miso soup	Oyster sauce	Pomegranate molasses	Preserved lemons	Sushi Nori	Tahini	Udon noodles
January 2019	18%	10%	23%	11%	11%	10%	19%	16%
± Change vs July 2018	+4%	+2%	±0%	+6%	+2%	+3%	+5%	+3%

SOURCE: *July 2018, January 2019 National Survey (SSI)*

Particularly amongst Committed Foodies, this trend should be playing into the hands of the specialist retailers, but the truth is they are holding share at best, with most showing slight declines. Many unusual ingredients that foodies increasingly have in their store cupboards can now be found quite easily in major grocery retailers, instead of people having to hunt them out at speciality shops. With growing pricing pressure and the challenge to differentiate themselves, the independent sector may well be entering a complex period unless it can innovate rapidly and ensure that their product aligns with foodie needs.

Question: How often do you shop at the following?
(Data shown is for Committed Foodie, 'Regularly')

Delis	Asian supermarket	Health food shops
25%	19%	25%
±0% YOY	-3% YOY	-2% YOY

SOURCE: *January 2018/2019 National Survey (SSI)*

Drivers of recipe choice

Recipes are great ways for brands to inspire consumers to try new products and also encourage regular consumption of established products. When consumers decide which new recipes to cook, drivers differ by consumer segment (i.e. Committed Foodie vs. Non-Foodie) and occasion (e.g. midweek meal vs. weekend meal). During the week, Non-Foodies are drawn to utility, while Committed Foodies are the opposite, prioritising health, flavour and enjoyment instead of speed and ease.

Question: What are the key factors when choosing a recipe to make during the week and at the weekend?

Weekday drivers	#1 Primary	#2 Secondary	#3 Tertiary
Non-Foodie	57% Easy to cook	47% Quick to cook	44% Affordable

Weekday drivers	#1 Primary	#2 Secondary	#3 Tertiary
Committed Foodie	46% Healthy	44% Enjoyable	43% Flavoursome

SOURCE: *January 2019 National Survey (SSI)*

During the weekend even Non-Foodies look for flavour and enjoyment, meaning cooking habits change for everyone. The dynamics amongst foodies change as the Weekend Foodies live up to their name and transition to match their more adventurous culinary cousins, the Committed Foodies. All foodies use their weekends to craft dishes that their families love with great flavour and a sense of excitement prioritised over everything else, throwing health concerns out of the window.

Brands, publications and influencers are all producing content (e.g. social media posts with recipes, etc.) and while it might get liked on social media, if the content doesn't align with consumer needs they are unlikely to be cooked. Effective content production requires deep insight into consumer habits, as otherwise it ends up just being expensive clickbait.

Question: What are the key factors when choosing a recipe to make during the week and at the weekend?

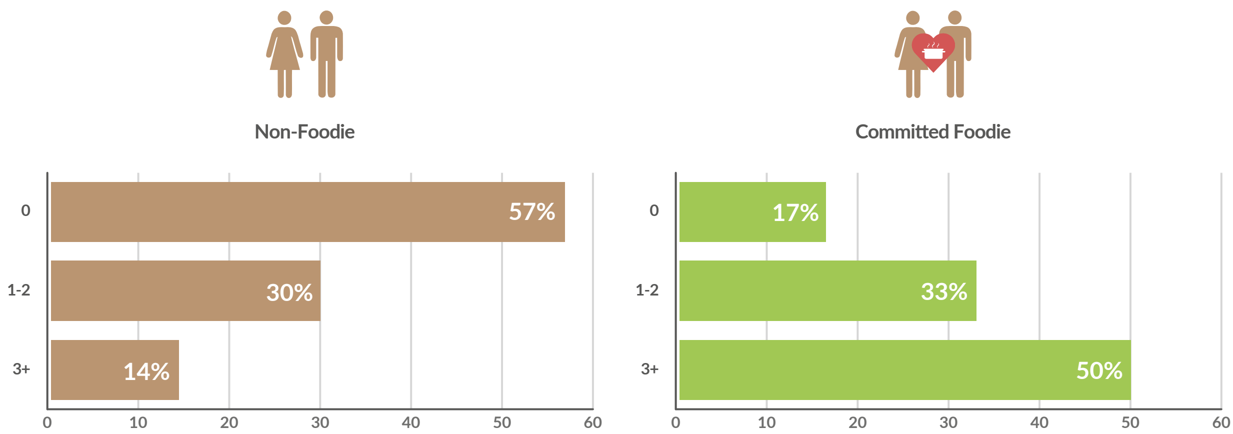
Weekend drivers	#1 Primary	#2 Secondary	#3 Tertiary
Committed Foodie	51% Enjoyable	50% Flavoursome	45% Loved by family

SOURCE: *January 2019 National Survey (SSI)*

Global Britain?

Almost half of Brits (47%) claim not to regularly cook the following cuisines at home: Italian, Chinese, French, Indian, Greek, Mexican, Spanish, Thai, Moroccan, Japanese, Vietnamese and Korean. Comparatively, foodies are embracing a wide range of cuisines with over half cooking more than three regularly. However, brands that promote these cuisines need to understand that each cuisine has a specific profile that will gain traction at different moments for different consumer groups.

Number of world cuisines cooked at home from scratch
(Data shown is for 'Regularly')



Non-Foodie   Committed Foodie

SOURCE: *January 2019 National Survey (SSI)*

For those Non-Foodies who do cook international cuisines, it seems that Chinese and Indian cuisines align best with their basic needs as they see them as easy, quick to cook and reasonably priced. The only other cuisine that aligns with Non-Foodies' needs is Mexican, but even so there is still a significant gap from Chinese and Indian.

Question: Thinking of the cuisines listed below, which of the following attributes apply to each cuisine?

Non-Foodie Weekday drivers	Easy to cook	Quick to cook	Affordable
Chinese	26%	23%	23%
Indian	24%	14%	22%

SOURCE: *January 2019 National Survey (SSI)*

Committed Foodies look for different things from their recipes during the week, and while Indian and Chinese food are still top of the charts, there are different factors at play. During the week, the importance of 'health' puts Indian food at a disadvantage to Chinese, Thai and Japanese but the cuisine still scores well on all the other drivers. While Japanese food has strong healthy credentials, when compared to some of the other cuisines, foodies do not currently see it as a flavoursome or enjoyable cuisine to cook. For Japanese cuisine to be adopted more widely, it needs to understand and challenge its current limitations.

Question: Thinking of the cuisines listed below, which of the following attributes apply to each cuisine?

Committed Foodie Weekday drivers	Healthy	Enjoyable	Flavoursome
Chinese	26%	33%	45%
Indian	18%	32%	47%
Thai	23%	21%	36%
Japanese	22%	14%	18%

SOURCE: *January 2019 National Survey (SSI)*

Through a lens of convenience and flavour, Non-Foodies still see Indian and Chinese cuisines as the perfect cuisines for the weekend. In contrast, foodies are looking to cook something both enjoyable and exciting. Considering that many of them pride themselves on being 'in the know' and ahead of trends, the opportunity for new cuisines to break through remains a possibility.

Question: Thinking of the cuisines listed below, which of the following attributes apply to each cuisine?

Committed Foodie Weekend drivers	Loved by family	Exciting
Chinese	32%	24%
Indian	34%	26%
Thai	18%	20%
Moroccan	13%	8%

SOURCE: *January 2019 National Survey (SSI)*

Entertaining

Considering the wide range of food content on TV, online and in magazines, it is hardly surprising that versus our 2018 data, more and more Brits claim to enjoy entertaining. The interesting thing is that underneath this surface enjoyment there is a degree of anxiety about cooking for others. In fact, 10% of Brits strongly agree that cooking for others makes them anxious and this rises to 21% amongst Committed Foodies. As is often the case, the higher your expectations, the greater your concerns.

Question: To what extent do you agree or disagree with the following statements?
- I enjoy entertaining friends and family with meals at my home
(Data shown is for 'Strongly agree' and 'Slightly agree')

Non-Foodie	Weekend Foodie	Committed Foodie
42%	84%	96%
+2% YOY	+3% YOY	+4% YOY

SOURCE: *January 2018/2019 National Survey (SSI)*

While the majority of foodies enjoy entertaining at home, the dinner party as a formal event is on the decline. The growth of more casual styles of cooking and international cuisines that lend themselves to sharing is likely to be fuelling this trend. If you dig into how people choose recipes when entertaining, new drivers emerge as foodies seek to impress their guests. This provides an opportunity for emerging cuisines like Thai, Japanese and perhaps even Korean or Vietnamese to carve new territory in the British foodie's culinary landscape.

Question: How many dinner parties have you hosted in the past 12 months?

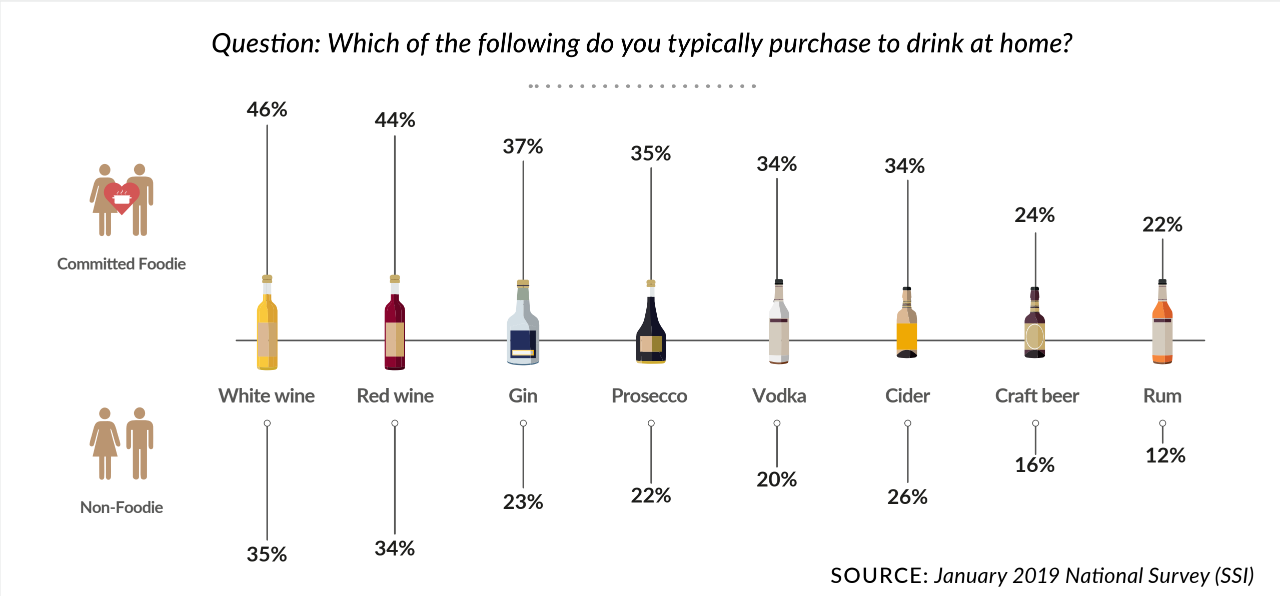
	Non-Foodie			Committed Foodie		
	0-1	2-6	7+	0-1	2-6	7+
	64%	31%	5%	27%	55%	18%
	+9% YOY	-7% YOY	-3% YOY	+11% YOY	+7% YOY	-18% YOY

SOURCE: *January 2018/2019 National Survey (SSI)*

GREAT BRITISH CHEFS

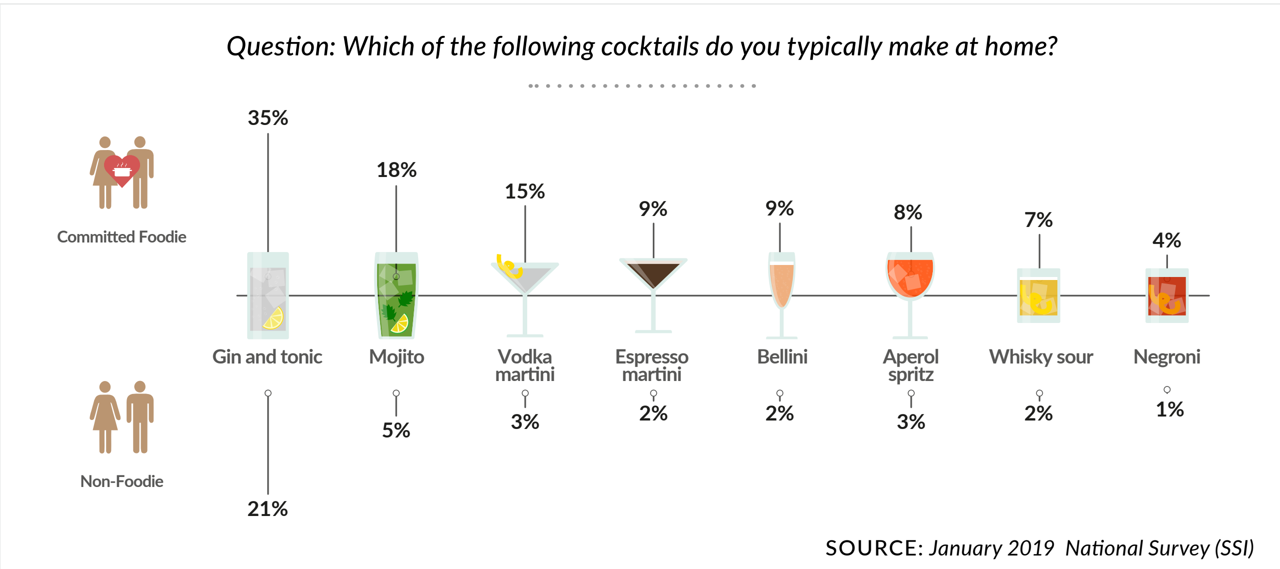
Alcohol: from the regular to the emerging

While 21% of Committed Foodies and 24% of Non-Foodies claim to not drink alcohol, the majority of Brits do drink, and they have an expanding list of beverages and spirits to choose from. What is clear from an analysis of British drinks cabinets is that foodies have a far wider drinking repertoire than Non-Foodies and some drinks like gin and Prosecco over-index significantly with foodies.



Examining the more specialist drinks like Cognac, tequila, vermouth or Campari, it is clear that these are very much the preserve of foodies and are broadly ignored by others. Tequila for example is purchased by 11% of Committed Foodies, compared to only 3% of Non-Foodies.

As we have seen in previous research, it is the foodies who are most likely to shake up a cocktail at home. Gin and tonic dominates the home bar scene, followed by vodka soda and vodka with lime and tonic. It is interesting how few people are making some of the most well known bar cocktails, with only a small percentage of Committed Foodies crafting whisky sours (7%), negronis (4%) or an old fashioned (5%).



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