



GREAT
BRITISH
CHEFS

EXPLORING BRITAIN'S FOOD LANDSCAPE 2018

GREAT BRITISH CHEFS INSIGHT

Summary

In January 2018, Great British Chefs commissioned a third-party research company (SSI) to run a survey with a nationally representative group of 3,000 people to get a better understanding of the food scene and the foodies within it. This was the second national survey we had carried out – our first in early 2017 was based on 2,000 people. The same surveys were also completed separately by a sample of the Great British Chefs audience (5,986 in 2018).

It is clear that the British food revolution is continuing to gather momentum. Analysing the responses, we find that whilst many Brits describe their food as homely and simple, there is a growing community of people who describe their food as adventurous and international. An ever-increasing range of cuisines are being cooked and unusual ingredients purchased.

Entertaining friends and family at home is on the rise across Britain and more and more people are agreeing strongly with a series of key statements that we use to identify foodies. The rise of the kitchen as the centre of the home continues, with people investing in renovations and installing the latest kit, such as induction hobs (10%) and instant hot water taps. Food is being sourced from a broader range of channels and while supermarkets dominate and the growth of online shopping continues, more people are buying from local butchers, fishmongers and delicatessens.

As food continues to become a more important part of our personal identity, groups are emerging that follow specific diets. While the vegan movement remains relatively small (5%), a large number of people are trying to eat less meat and follow more of a plant-based diet (25%). While over 70% of people claim to eat everything, this culinary diversity also leads to 45% of people eating protein substitutes like Quorn.

While vegetable boxes and meal kits remain nascent and the preserve of foodies, takeaways and delivered meals are becoming more mainstream. Takeaways seem to have been redefined as something to enjoy rather than just a speedy meal solution, something which can be seen in the number of foodies who are regularly ordering them.

However, against this backdrop is an increasing rejection of processed food and concerns over food safety. Over 70% of Brits believe that the government should be doing more to make food safe, a percentage that increases to 88% amongst the key foodie segment. There is also a growing concern, particularly amongst foodies, of the impact of Brexit on food prices. 2018 promises to be another complex year!



11%

**Regularly use
takeaway delivery
services**



21%

**Shop regularly at
butchers**



23%

**Shop regularly
online for groceries**

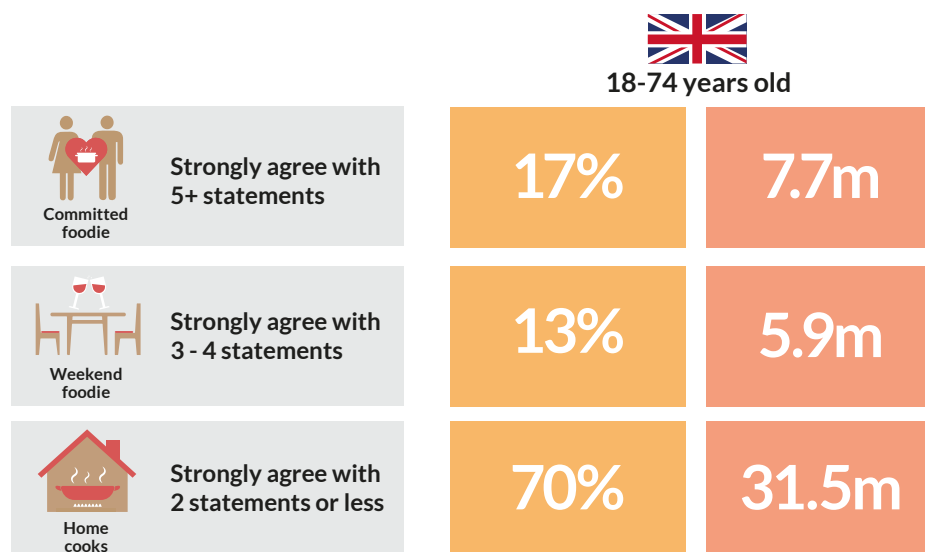
The world of foodies is dynamic with significant changes even over the last 12 months. For brands to resonate with these premium consumers they need to know how to authentically engage with them. Great British Chefs has the insight and expertise to help brands win over this fast-growing influential audience.

The segments

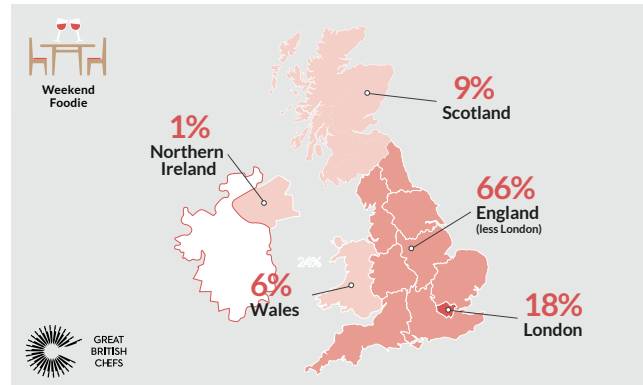
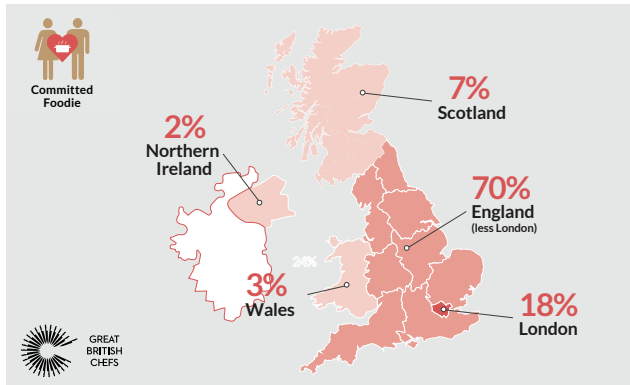
The people we surveyed have been categorised into three segments ('Committed Foodie', 'Weekend Foodie' and 'Home Cook') depending on how strongly they agreed with 10 food-related statements – a method we found was the most effective at discriminating foodies from non-foodies. The segments were created based upon how many of the statements people strongly agreed with. As such, in order to qualify as a **Committed Foodie** someone would need to strongly agree with at least five statements while a **Weekend Foodie** would need to strongly agree with three or four statements.



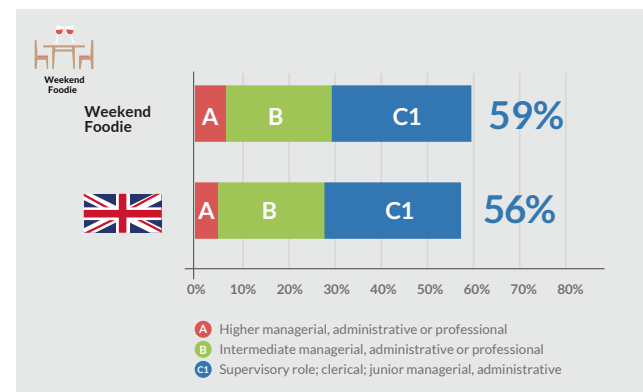
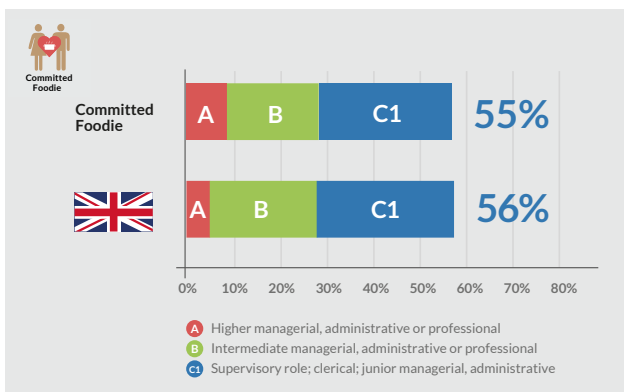
This was a more stringent criteria than the one applied in 2017, when Committed Foodies only needed to strongly agree with at least four statements and Weekend Foodies only two or three. This tightening of the qualification criteria was done in response to the growing number of people who agreed with 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 stays broadly stable: 14 million in 2017 versus 13.6 million in 2018.



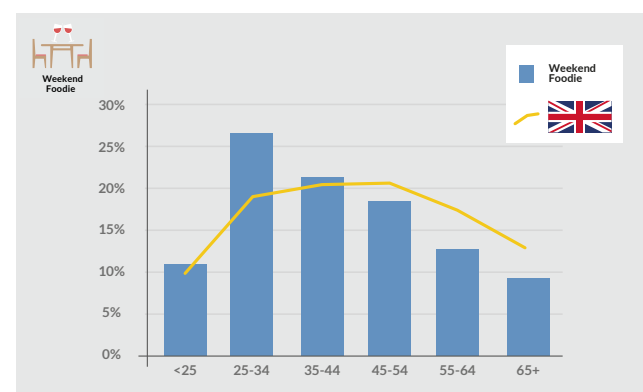
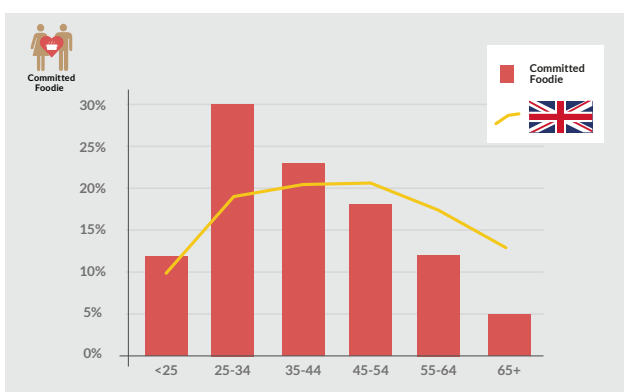
As witnessed in the research we carried out in 2017, the reality that foodies are based across Britain remains constant. For brands trying to reach Committed and Weekend Foodies, only a national approach will allow them to reach their potential, as the majority are based outside London.



While socio-economic factors have some influence over a person's food choices and which foodie statements they agree with, it is clear that the segments are not defined by socio-economic status. 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.

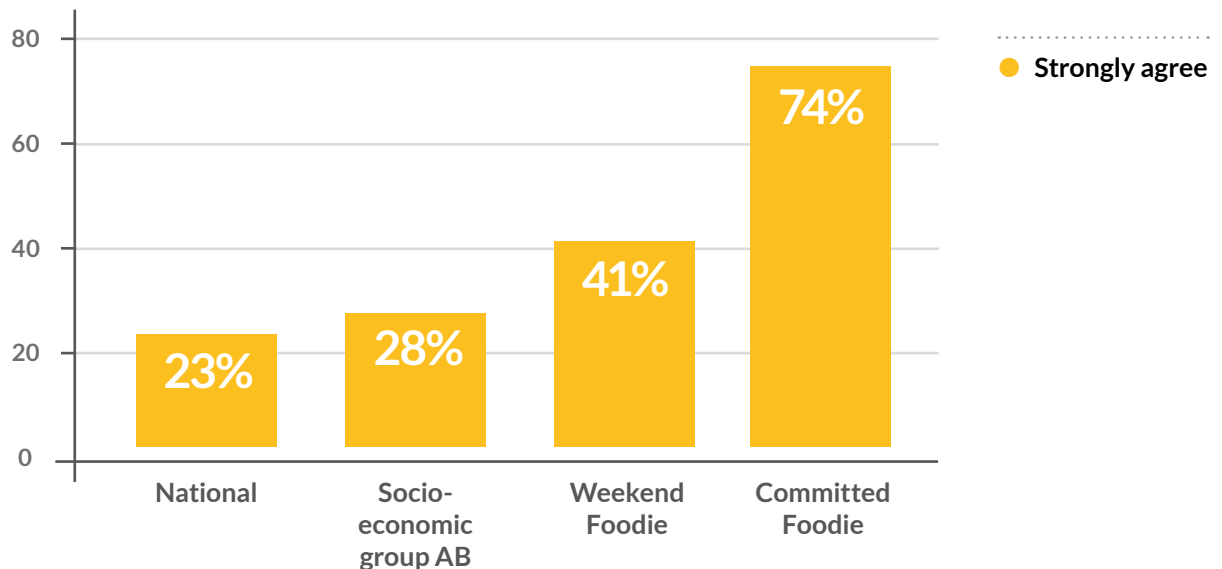


The largest group of Committed Foodies is the 25-34-year-olds, the generation that have truly lived through Britain's food revolution. Our approach to food is now a part of our self-definition and while different age groups have very different views of food, foodies are united across age segments.



Brand purchasing

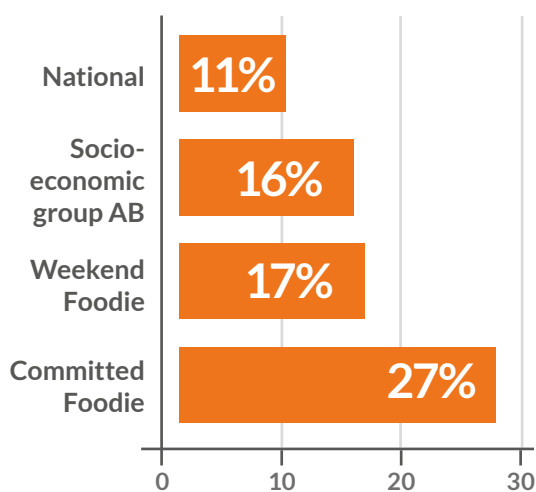
When looking at the purchasing behaviour of Committed Foodies and Weekend Foodies, it is clear that they are prepared to pay for quality above and beyond all other groups. This makes both of these groups (particularly the Committed Foodie) a key target for premium brands.



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

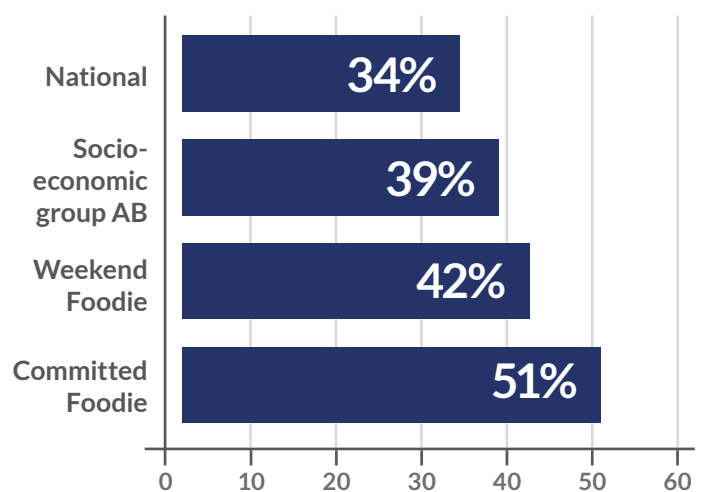
This translates into brand purchasing and often loyalty, particularly for brands that have committed themselves to delivering quality products and communicating intelligently with these audiences.

kikkoman



● % who buy it regularly

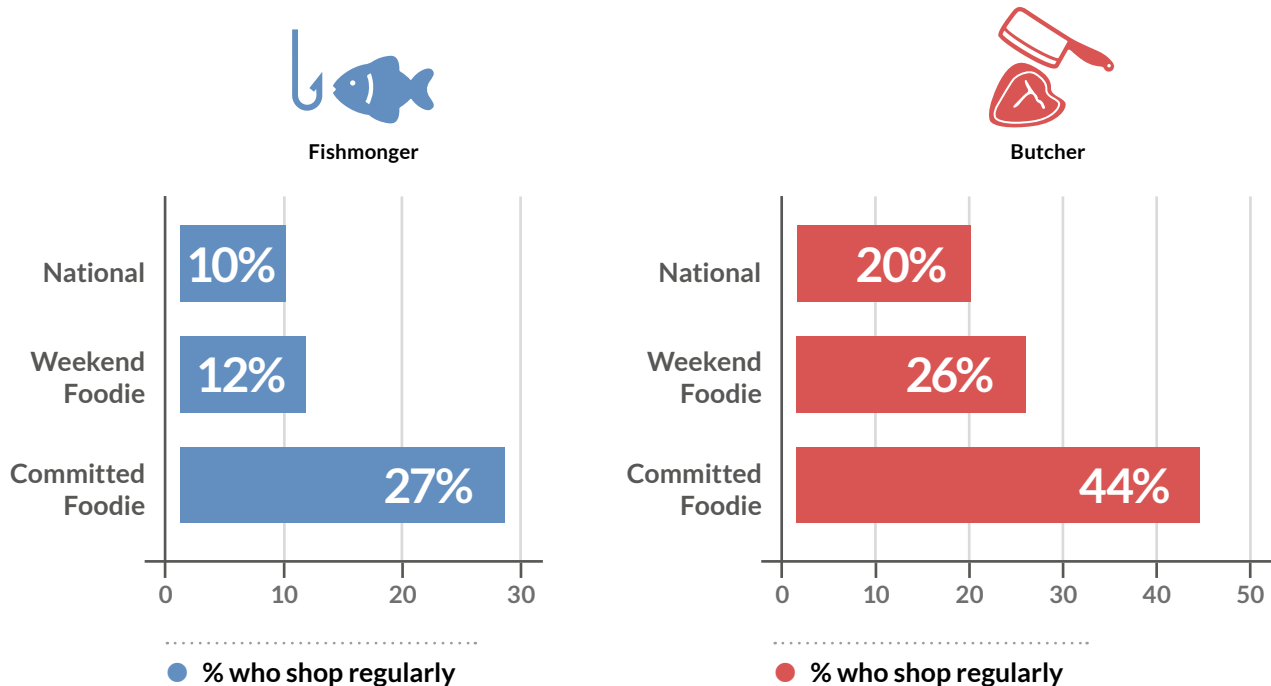
LURPAK



● % who buy it regularly

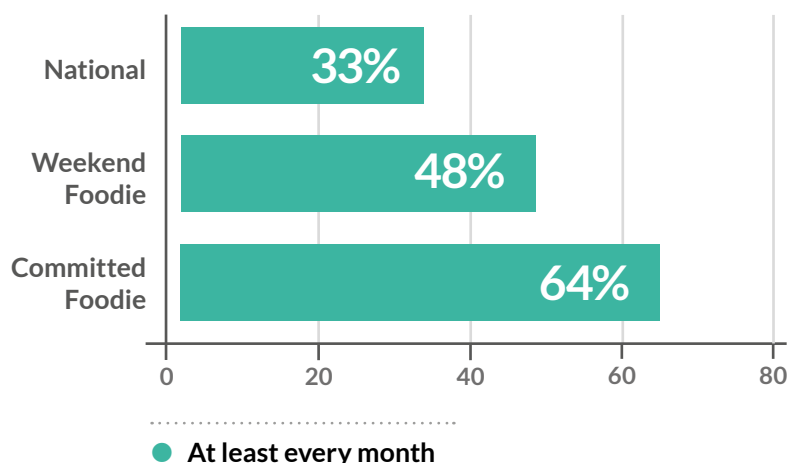
Shopping habits

Tesco remains the destination of choice for everyone (including foodies) but it is Waitrose that over-indexes significantly with this group. Aldi and Lidl's offering has also been embraced by foodies with 35% of Committed Foodies shopping at Aldi regularly (versus 28% of Brits). However, it is in independently owned shops that we have seen the greatest change over the last year, perhaps driven by food scandals. Butchers, fishmongers, delicatessens, farmers' markets and Asian supermarkets are all being embraced by foodies like never before.



Entertaining

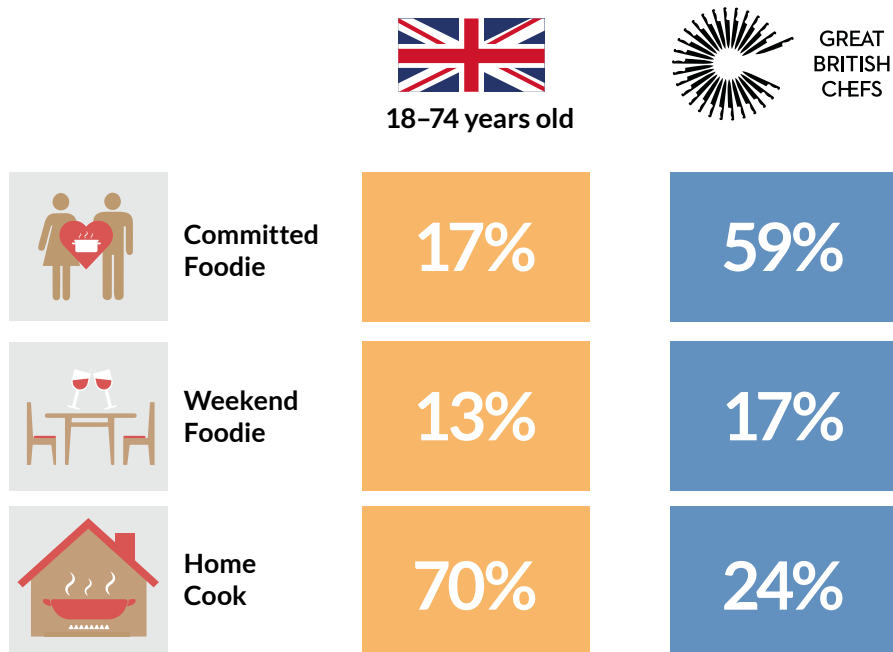
There has been a significant increase in how often we entertain friends and family at home over the last year, as 33% of Brits now entertain every month (+6% versus 2017). Committed Foodies have also increased their commitment to entertaining – it is worth targeting Committed Foodies as 64% entertain on a monthly basis and are likely to consume more food and drink than others, clearly enjoying the whole process, showcasing and sharing what they have discovered with their friends.



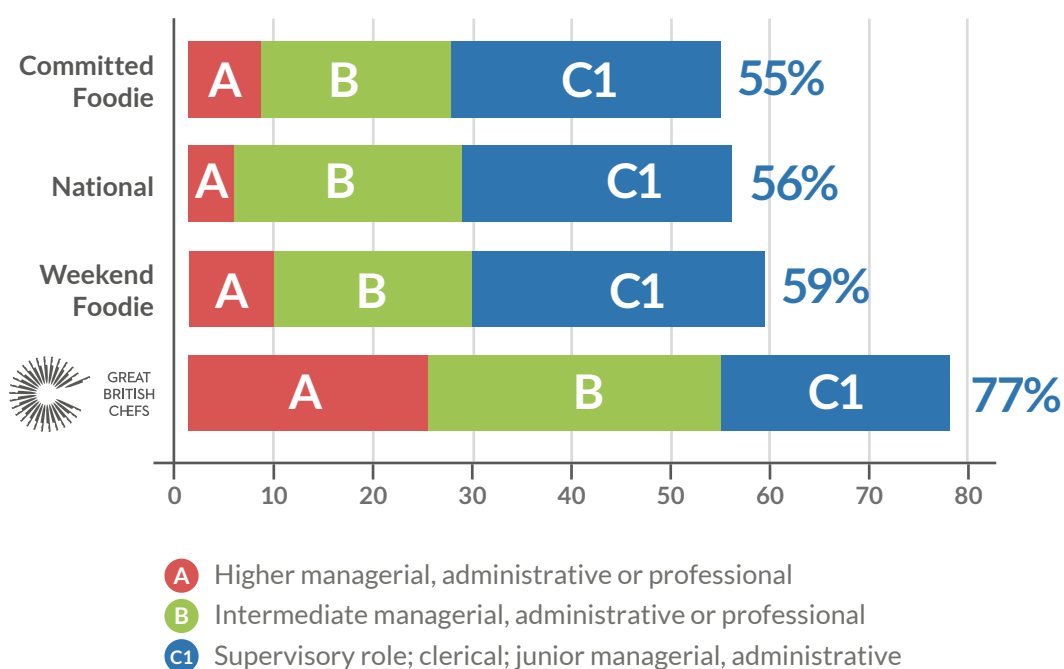
Question: Roughly how often do you invite friends and family to your home for a meal that you cook yourself?

Great British Chefs

Our 2018 survey was also conducted with the Great British Chefs audience, with 5,986 responses collected. This was then weighted to reflect the age and gender profile of our website traffic according to Google Analytics and mapped against the national segmentation. This helped us to understand the profile of our audience, which emerges overwhelmingly as a group of Committed Foodies.



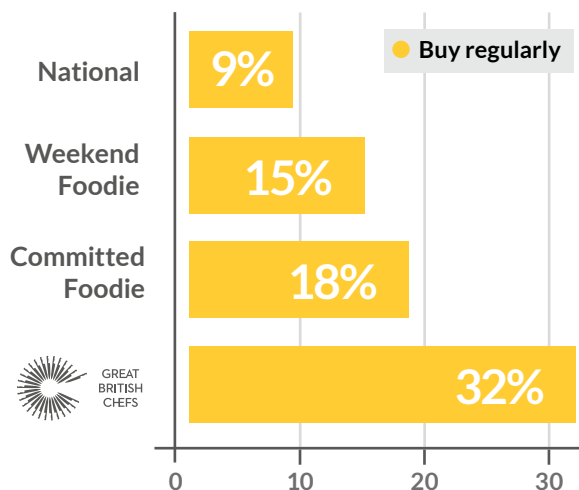
The Great British Chefs audience is more premium than the national foodie segments. Our users are more experimental, cook a wider range of dishes, own more equipment and are prepared to invest in quality. This makes our audience particularly interested in relevant premium brands.



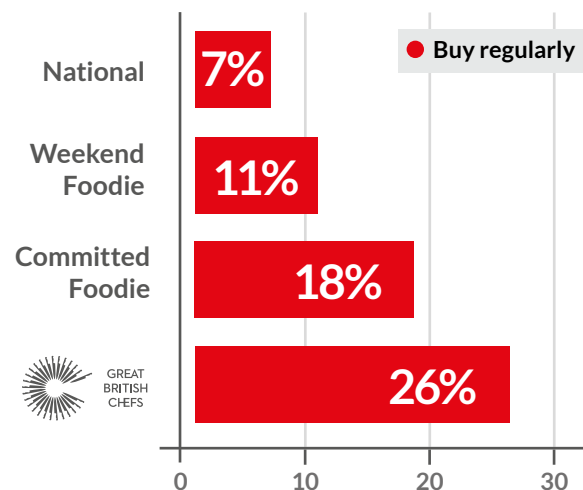
Working with brands

As a business, we work directly with brands to help them win with foodies, by giving them the insight and advice they need to engage Committed Foodies and Weekend Foodies. We develop integrated campaigns for these brands that include inspirational content from top chefs and influencers and a combination of media, social outreach and events. We pride ourselves on being able to consistently show that our audience buys significantly more of our brand partners' products than the national foodie segments.

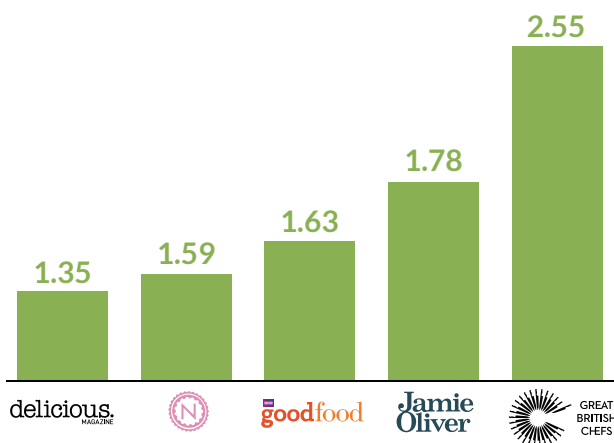
Great British Chefs' client A for 5 years



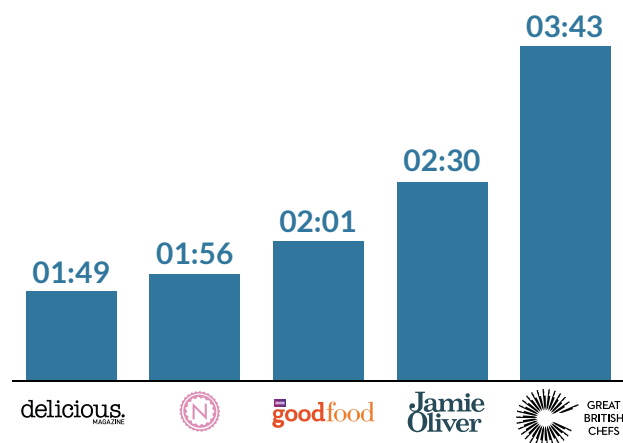
Great British Chefs' client B for 4 years



We are a truly digital brand and invest our time and resources in delivering for our rapidly growing community of foodies, which helped us deliver traffic growth of 30% in 2017. The quality of our content and performance of our website (that is, according to Pingdom, faster than all other UK food sites including Jamie Oliver and Delicious Magazine) means that our audience is more engaged and helps deliver an improved ROI for our brand partners.



● pages per visit



● time on site

Source: alexa.com
Oct-Dec 2017.

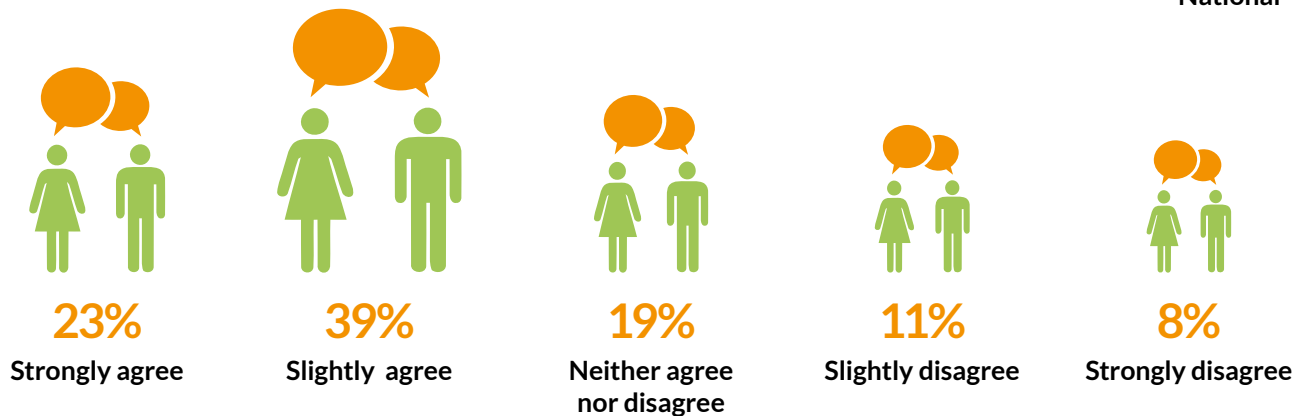
If you would like to hear more about our approach, our deep insight into Britain's 14 million foodies or our case studies, please get in touch.

Ollie Lloyd
CEO Great British Chefs
Ollie@greatbritishchefs.com

Talking food

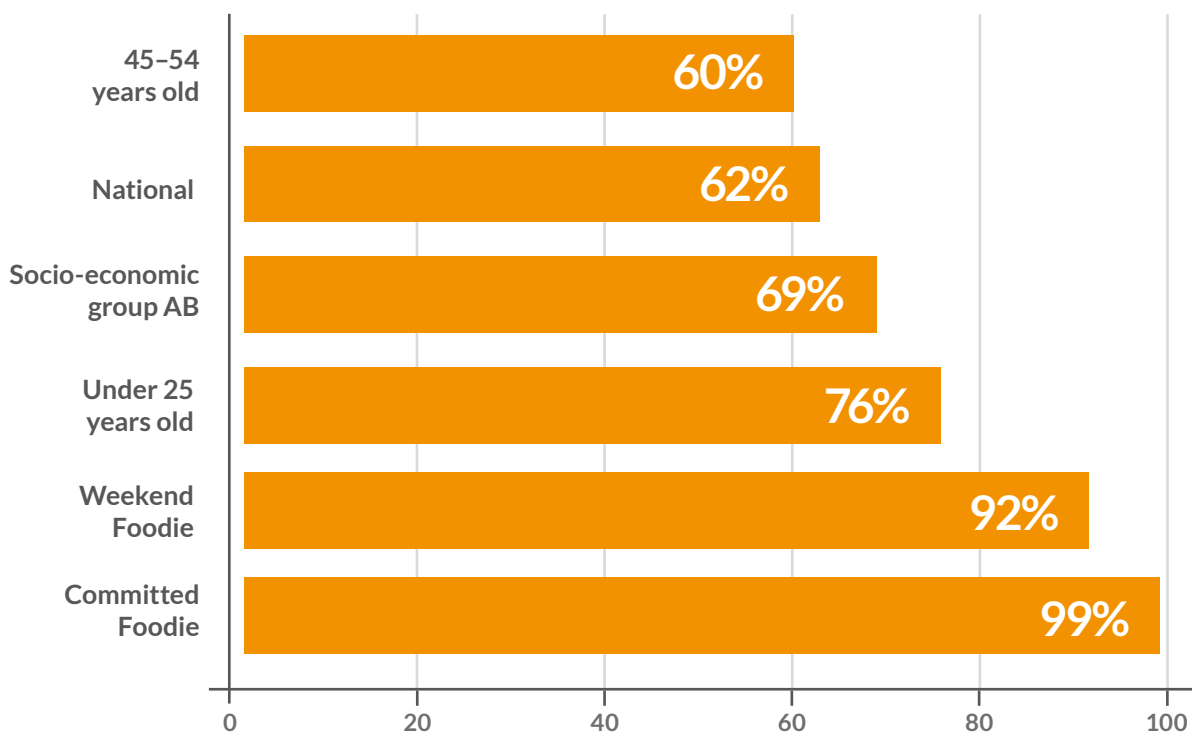
Food is a popular conversation topic in the UK, with over 60% of Brits agreeing that they enjoy talking about food and what they are planning to eat. Food is an even more important topic with younger consumers, topping out at 76% of 18–25 year olds agreeing with this statement. Interest in food and meal planning is even higher amongst Committed Foodies with virtually all enjoying this topic.

National



Question: To what extent do you agree or disagree with the following statements about your interest in food: I enjoy talking about food and planning what I am going to eat

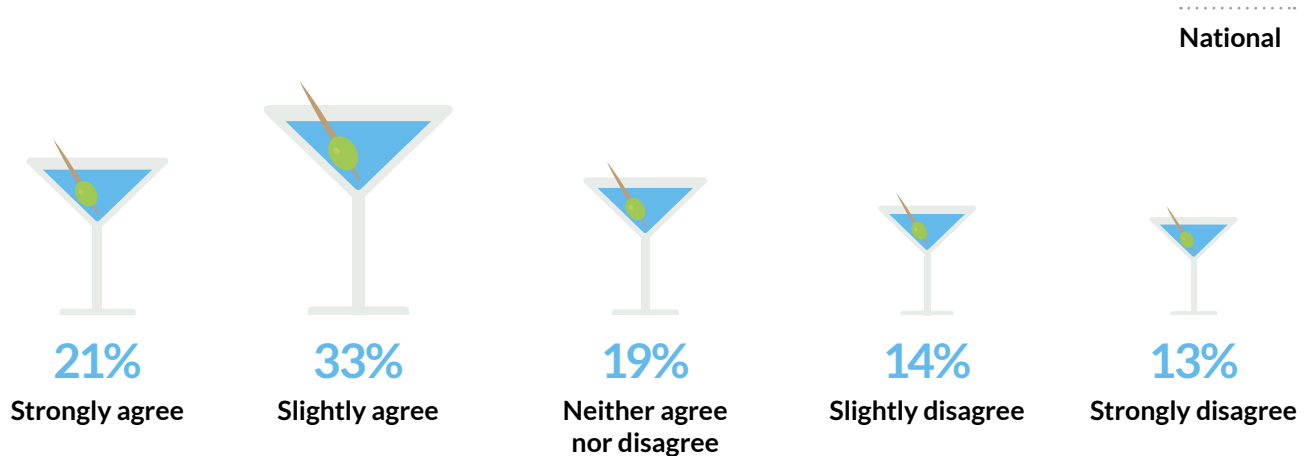
Segmentation



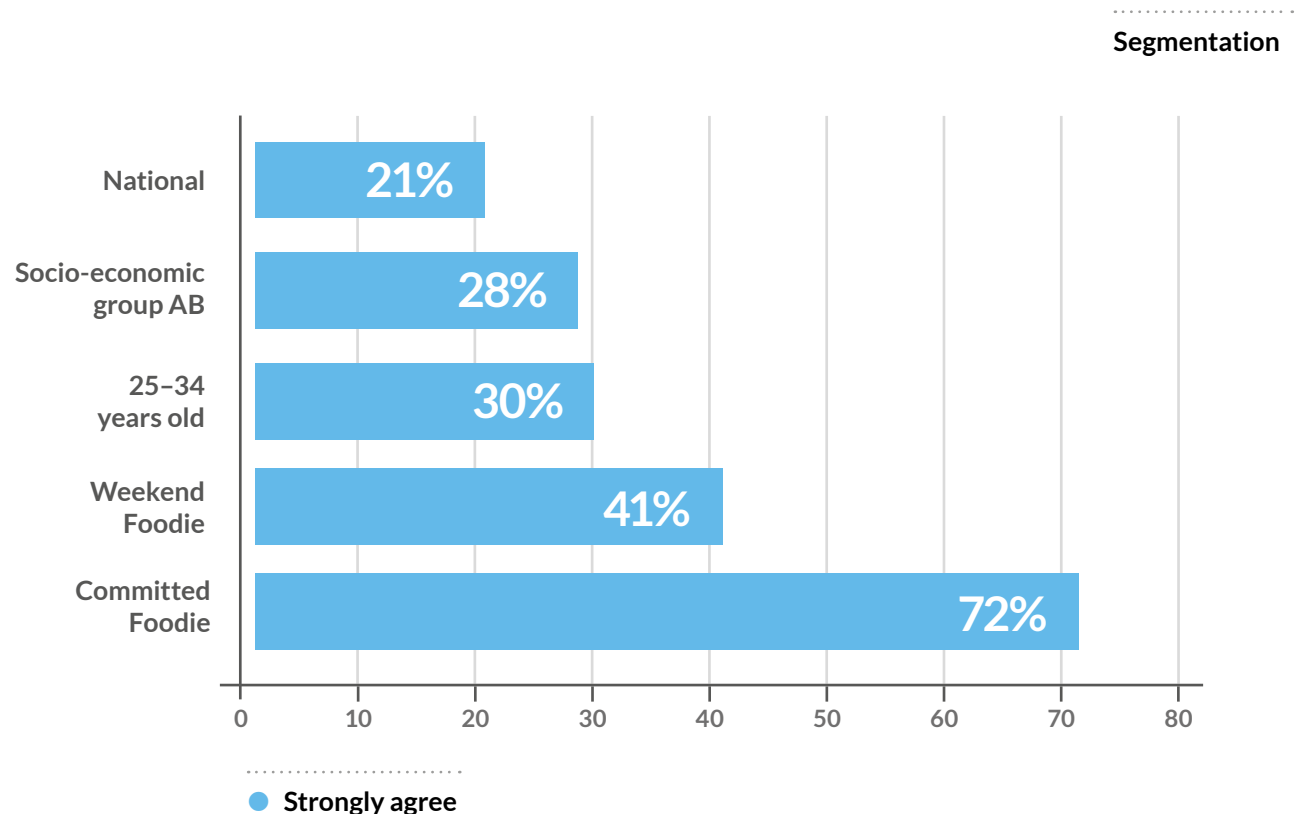
● Strongly agree & slightly agree

Entertaining

The majority of Committed Foodies (72%) strongly agree that they enjoy entertaining friends and family with meals at home. This is substantially higher than the national figure of only 21% of Brits reporting the same enjoyment from entertaining at home. Those in socio-economic group AB and 25–34-year-olds also report increased enjoyment in entertaining with meals at home.



Question: To what extent do you agree or disagree with the following statements about cooking: I enjoy entertaining friends and family with meals at my home

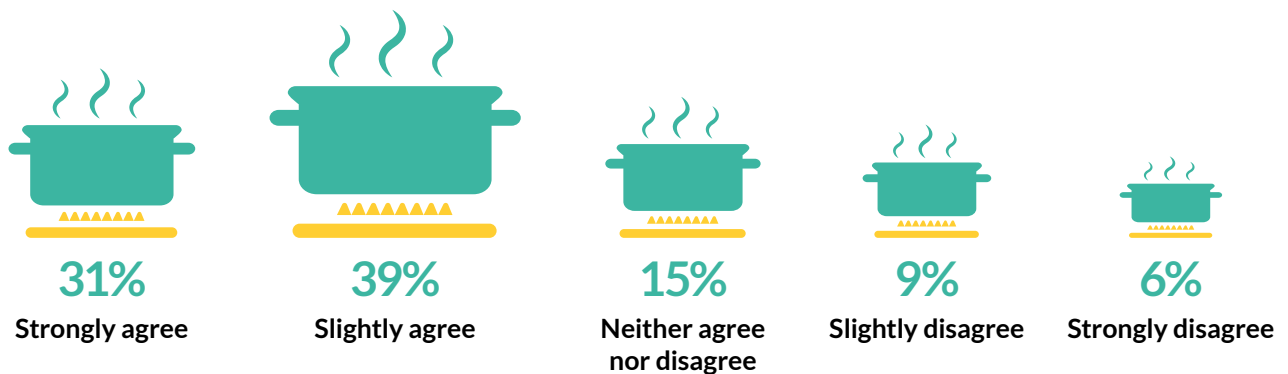


Targeting foodies when they are entertaining offers significant potential for brands. Not only do foodies invest in these moments but they also behave as advocates, spreading the word.

New recipes

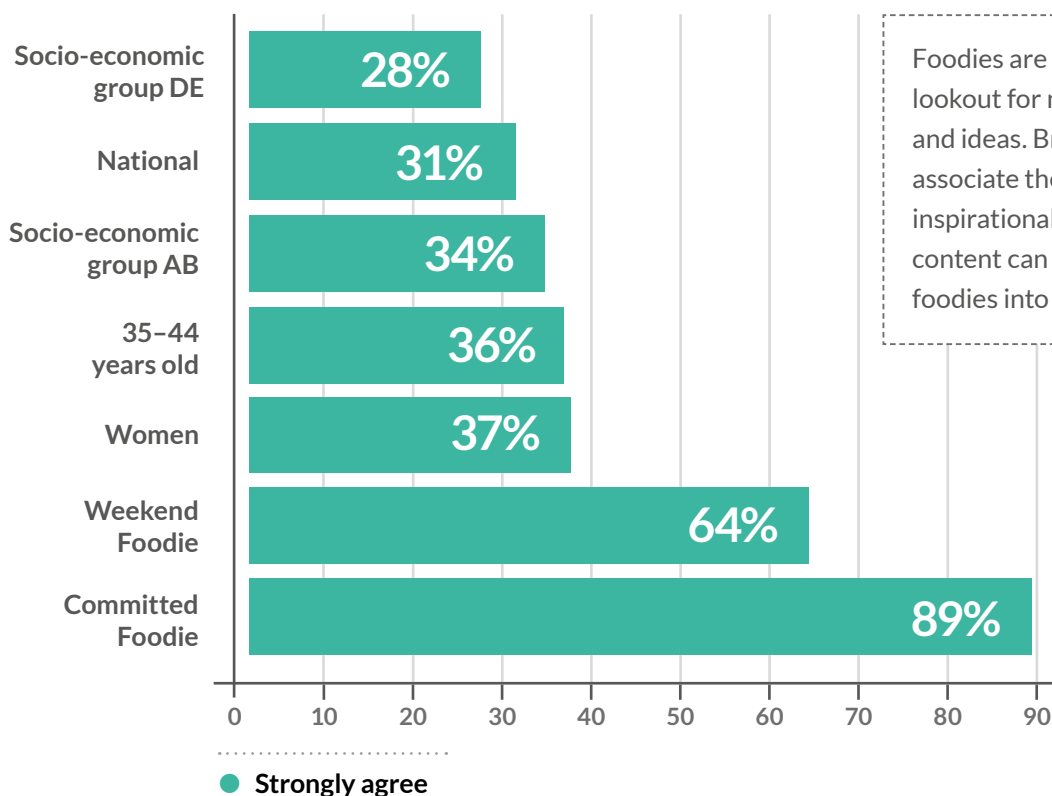
70% of Brits agree that they like to try new recipes (+2% on 2017). Women are significantly more into trying out new recipes than men and those aged 25–34 like to try out new recipes the most. Unsurprisingly, Committed Foodies are the most into culinary experimentation, with almost 90% of them strongly agreeing with the statement ‘I like to try out new recipes’; almost three times the national figure.

National



Question: To what extent do you agree or disagree with the following statement about cooking: I like to try out new recipes

Segmentation

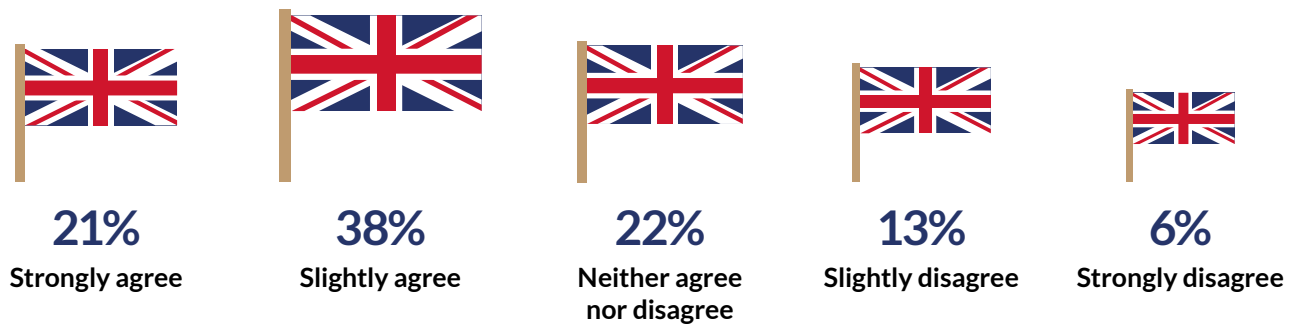


Foodies are always on the lookout for new recipes and ideas. Brands that can associate themselves with inspirational, authoritative content can turn these foodies into advocates.

Provenance

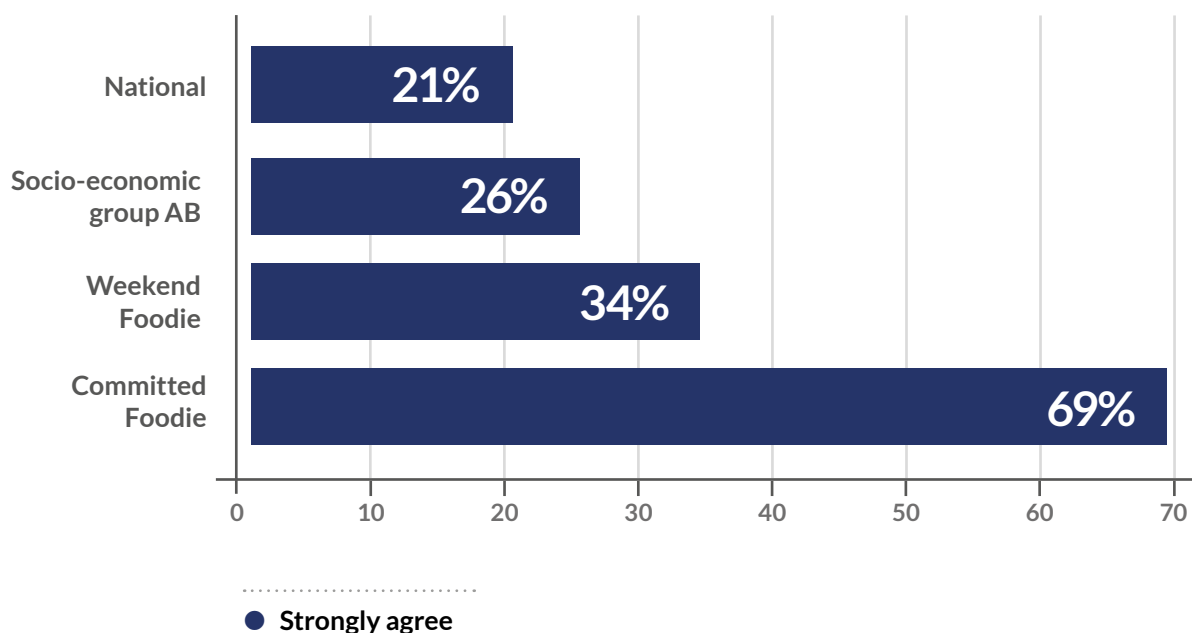
Although only 21% of Brits report a strong interest in where the ingredients they buy come from, this number rises significantly amongst Committed Foodies (69%) and the Great British Chefs audience (55%). Other key demographics such as socio-economic group AB and 25–34-year-olds report moderately higher interest than the national audience with just over a quarter strongly agreeing that they are interested in the origin of their ingredients.

National



Question: To what extent do you agree or disagree with the following statement about your interest in food: I'm interested in where the ingredients I buy come from

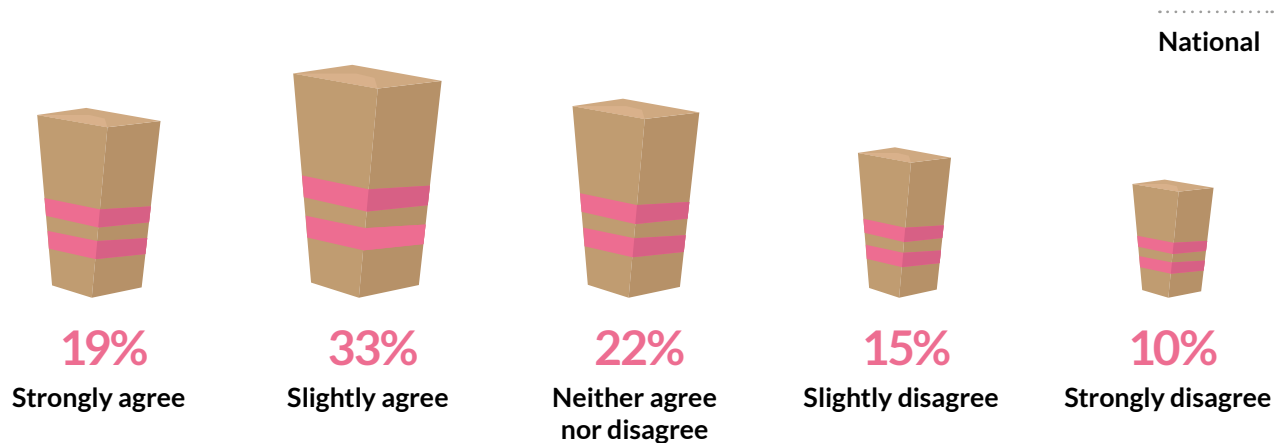
Segmentation



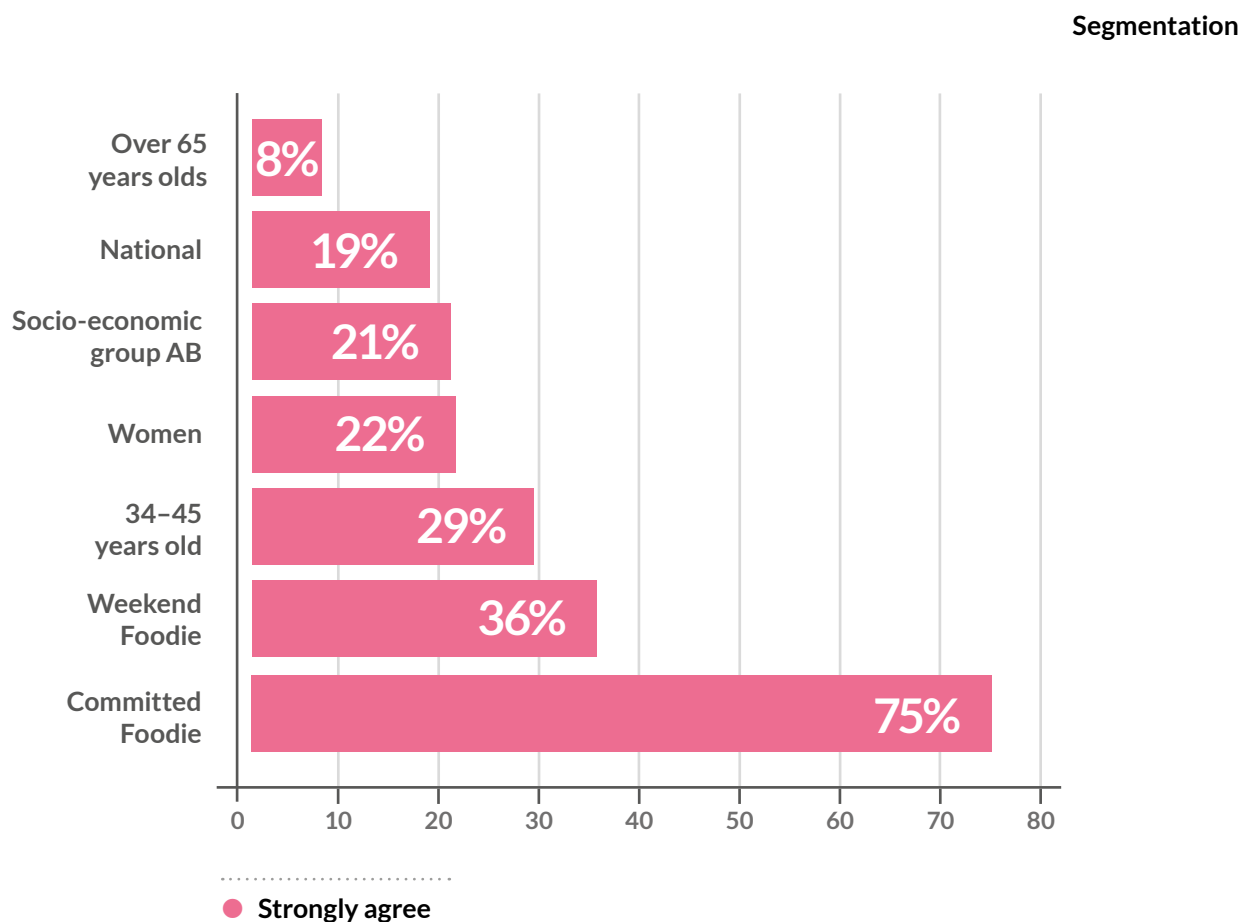
Foodies are becoming more and more interested in the stories behind brands and the provenance of ingredients. They demand more details than the average consumer and understand more nuanced backstories.

Unusual ingredients

52% of those in the UK agree they enjoy finding and buying unusual ingredients (+8% versus 2017). Older audiences and men are the least likely to agree with this statement, while the younger and more affluent groups are more likely to seek out something a little different. The more foodie the group, the more committed they are to finding unusual ingredients – something that aligns with the wide repertoire of cuisines they are cooking at home.

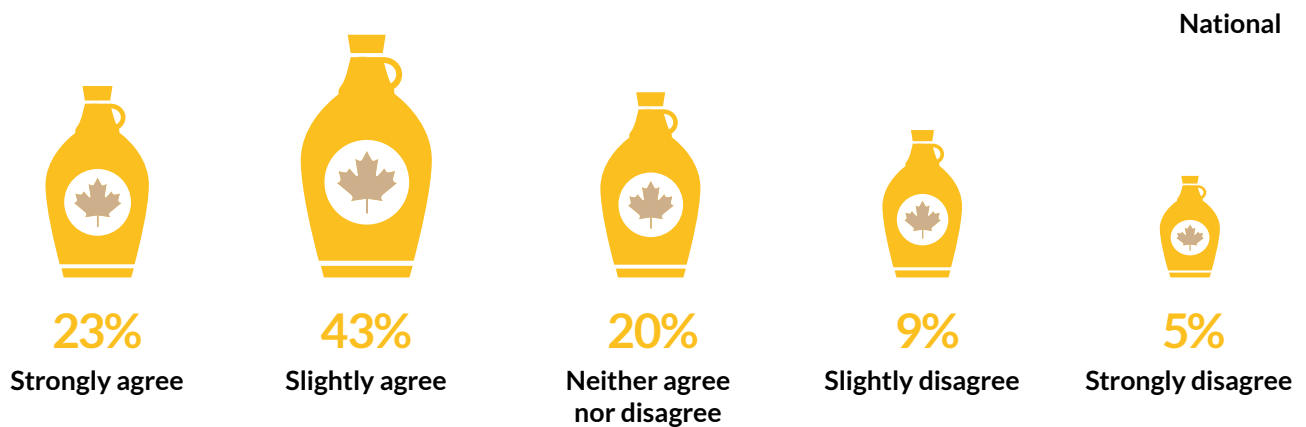


Question: *To what extent do you agree or disagree with the following statement about your interest in food: I enjoy finding and buying unusual ingredients*

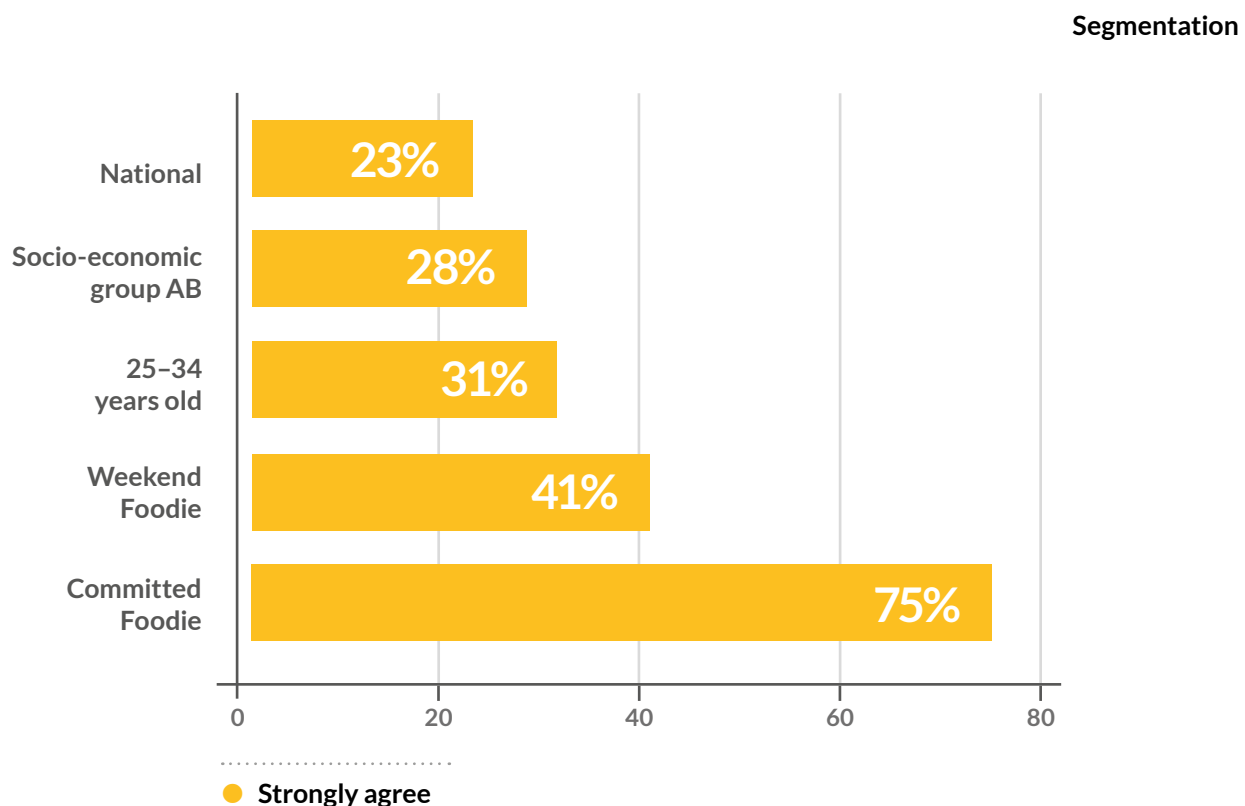


Paying for quality

66% of Brits are prepared to pay a bit extra for quality products – an increase of 6% from 2017. This trend can also be seen in the increasing number of people who are seeking out specialist retailers (e.g. butchers and fishmongers) and also in the number of people who are seeking out specific and unusual items. 25–34-year-olds are the most prepared to pay for quality, even more so than socio-economic group AB. Unsurprisingly, it is the foodies who are the most prepared to invest in their passion.



Question: *To what extent do you agree or disagree with the following statement about your interest in food: I am happy to pay a bit extra for quality food products*



In categories dominated by retailers, brands should focus on justifying their premium to foodies, who are open to paying extra if they believe in the credibility of the brand and their story.

Online grocery shopping

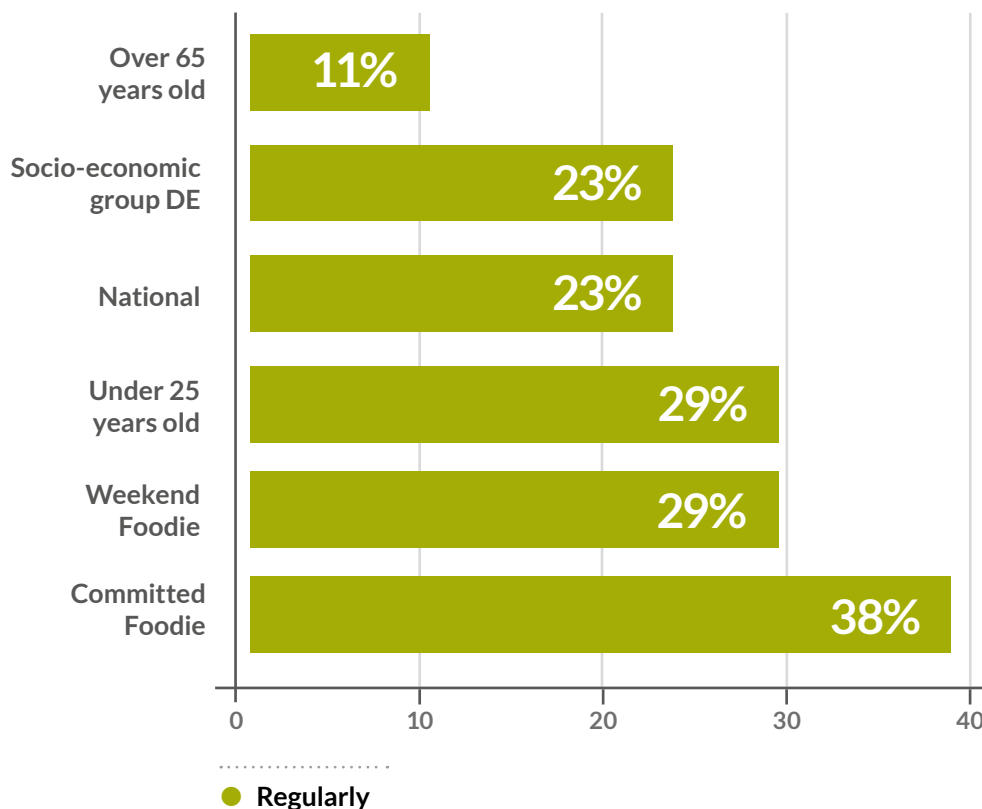
While 87% of Brits claim to shop in supermarkets the online shopping revolution continues to gather pace, with 23% of the UK claiming to regularly shop for their groceries online. This has increased significantly in the last 12 months in terms of regular online shopping (+6%) and less so with occasional shopping (+2%). The audiences that are most into online grocery shopping are younger (25–44) and foodie, with 38% of Committed Foodies and 29% of Weekend Foodies shopping online for groceries regularly.

National







Question: *How often do you shop at the following?* Data shown is for 'online grocery services'.

Segmentation








Specialist shopping

Since our last piece of research, there has been a significant shift towards more specialist shopping. The percentage of Brits who shop regularly at butchers, fishmongers, farmers' markets and delicatessens have all increased. These increases are most significant amongst Committed Foodies and Weekend Foodies. We also asked about bakeries, Asian supermarkets and health food shops, all of which are disproportionately attractive to foodies.

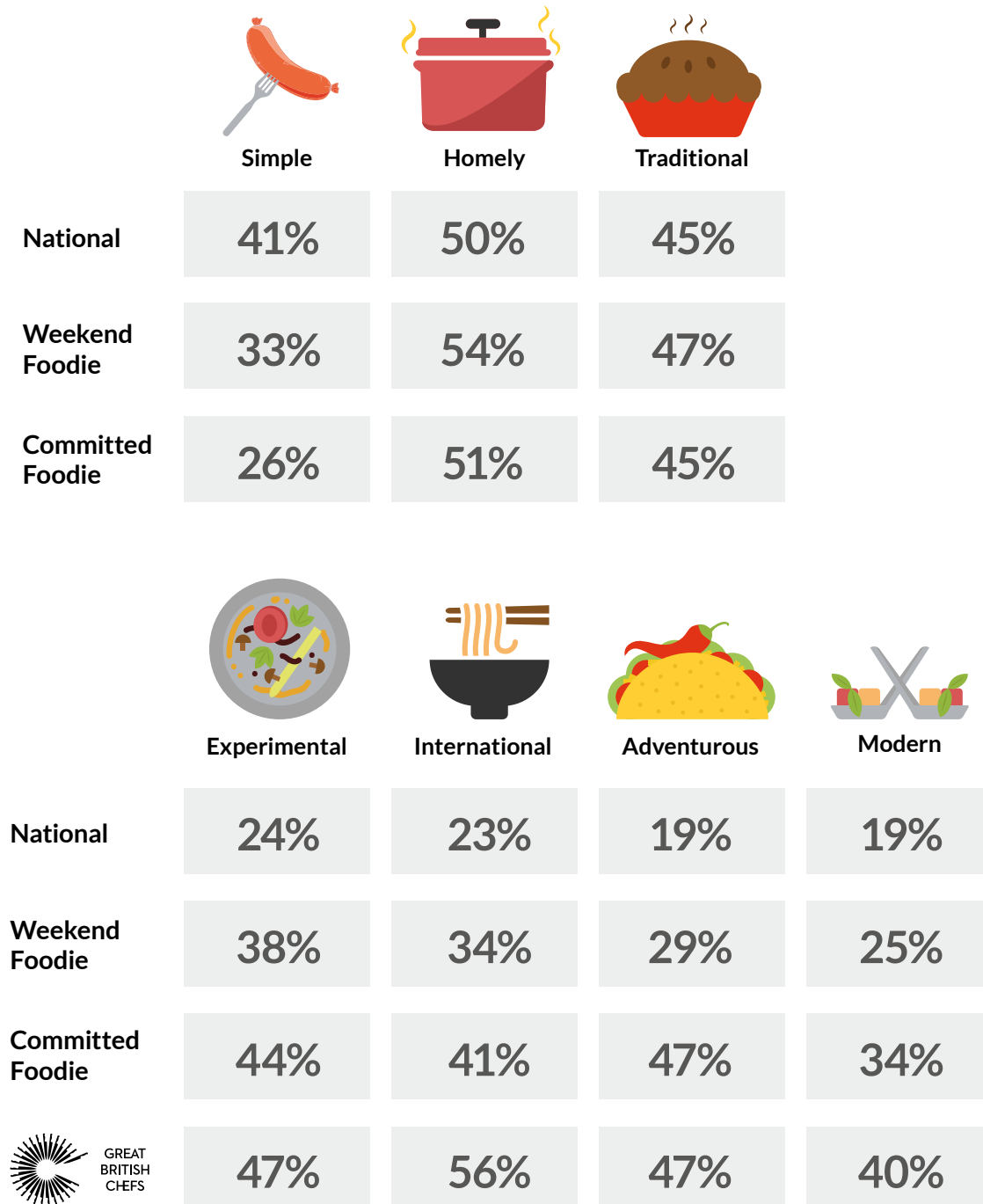
	National			
				
	Deli	Farmers' market	Fishmonger	Butcher
2018	8%	11%	10%	21%
2017	7%	7%	9%	14%

Question: How often do you shop at the following? Data shown is for 'regularly'.

	Segmentation			
				
	Deli	Farmers' market	Fishmonger	Butcher
National	8%	11%	10%	21%
Weekend Foodie	10%	16%	12%	26%
Committed Foodie	25%	27%	27%	44%
 GREAT BRITISH CHEFS	21%	25%	24%	36%

Style of cooking

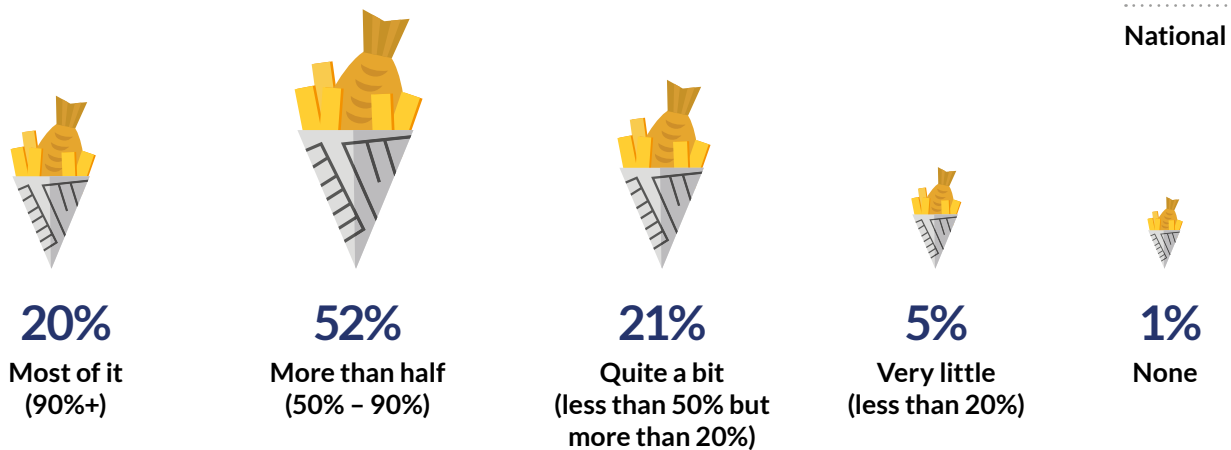
Nationally, Brits would describe their cooking as homely, traditional and simple. However, there is a marked difference between the segments. Committed Foodies describe their cooking as adventurous, experimental and international, as well as agreeing with some of the key national descriptors like homely and traditional. Younger audiences (20–34), on the other hand, do not see their cooking style as traditional and describe it as far less British than the general national population.



Question: *How would you describe your style of cooking?*







British and international cuisine

While 72% of Brits consider over half their home cooking to be British, this decreases significantly amongst younger (under-45s) and more foodie audiences. In terms of global cuisines, Italian tops the list of most regularly cooked, followed by Indian, Chinese and Mexican. A number of more specialist cuisines (Moroccan and Japanese) are clearly of great interest to foodies but to date have less traction with Brits as a whole.



Question: How much of your home cooked food would you describe as 'British'?

Segmentation

	 Indian	 Chinese	 Mexican	 Moroccan	 Japanese
National	26%	22%	14%	5%	5%
Weekend Foodie	37%	30%	25%	7%	8%
Committed Foodie	46%	40%	31%	13%	12%
 GREAT BRITISH CHEFS	47%	30%	29%	12%	8%

Question: Which of the following cuisines do you cook at home from scratch? Data shown is for 'regularly'.

For more insight into the cuisines that consumers are cooking, the types of restaurants they are visiting and the countries they have been to, please get in touch with kieron@greatbritishchefs.com.

Meal solutions and boxes

Amongst Brits, both vegetable boxes (5%) and meal kits (4%) have made a limited impact, with only a few people buying them regularly. 12% of both Committed Foodies and the Great British Chefs audience are regularly buying veg boxes, but only 2% of Home Cooks are using them. Despite meal kits technically falling under the 'cheat' category, they resonate more with Committed Foodies, the Great British Chefs audience and younger people (25–34) than any other group.


Segmentation



VEG BOXES



MEAL KITS

	Regularly	Occasionally		Regularly	Occasionally
National	5%	9%		4%	13%
Weekend Foodie	9%	13%		7%	16%
Committed Foodie	12%	16%		12%	18%
 GREAT BRITISH CHEFS	12%	22%		11%	25%

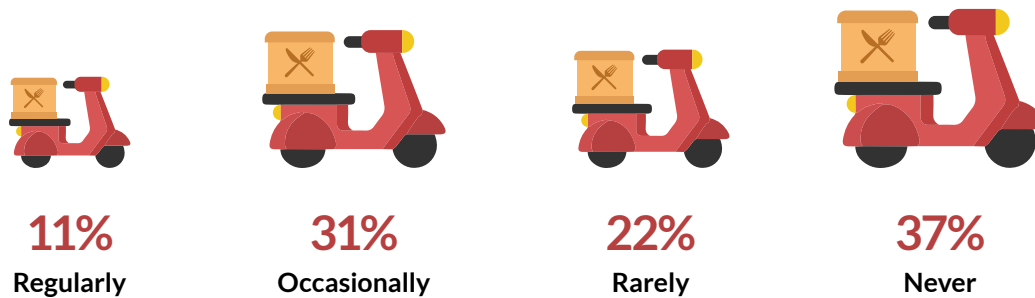
Question: *How often do you use the following services? Data shown is for 'vegetable boxes (e.g. Abel & Cole, Riverford etc.)' and 'meal kits (e.g. Hello Fresh, Gusto)'.*

Foodies enjoy culinary challenges, so when they are time-poor they are still being attracted by concepts that allow them to create a meal out of random vegetables or assemble a meal solution that's delivered in a box.

The world of takeaways

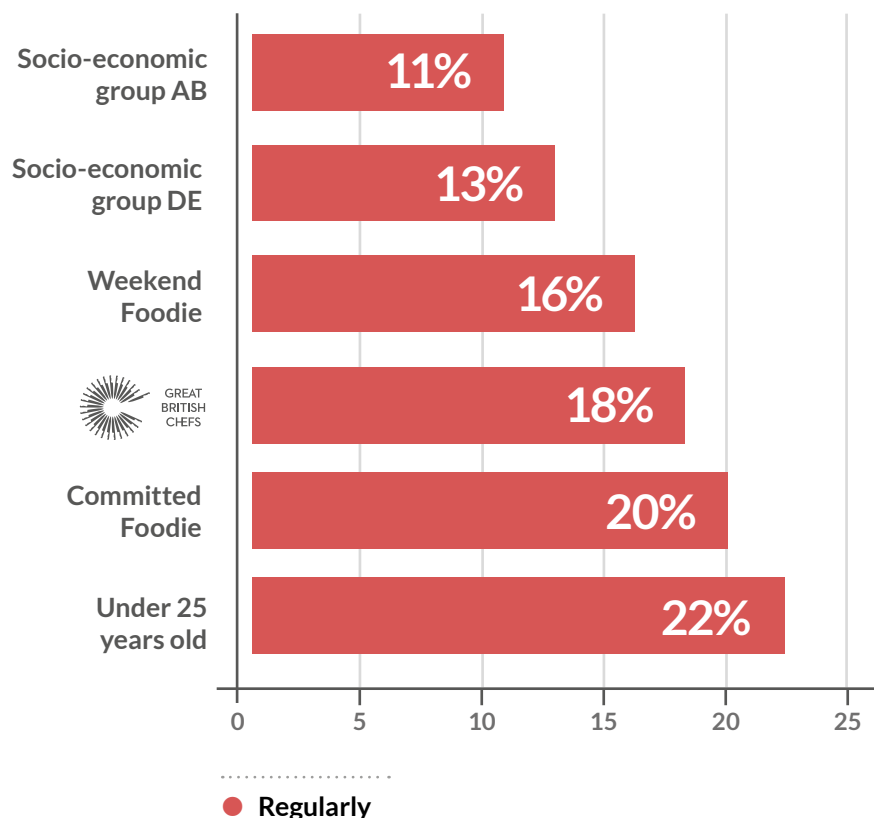
11% of the UK now claims to order a takeaway regularly. This doubles amongst under-34s and decreases dramatically amongst the over-55s (less than 2% order regularly). Considering the average foodie's obsession with all things food, it is perhaps not surprising that all types of foodies are ordering takeaways far more regularly than the non-foodie segment. This maybe due to the rise of services such as Deliveroo, which make a wider variety of cuisines and higher quality dishes available for delivery.

National



Question: *How often do you use the following services? Data shown is for 'takeaway delivery (e.g. Deliveroo, UberEats)'.*

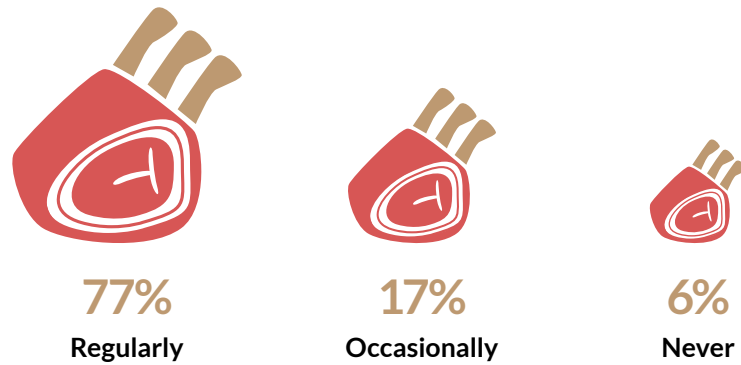
Segmentation



Takeaways have undergone a revolution over the last five years as delivery services have partnered with more and more premium restaurants. While younger audiences currently over-index, there is significant potential to engage older and more foodie audiences.


Meat consumption

While 5% of the UK is vegan, a further 8% is vegetarian and 7% is pescatarian, only 6% of the UK claims to never eat meat. Despite the move towards more plant-based eating, beef (76%) is more popular than cod and salmon and appeals across the spectrum. While lamb is cooked by more than 50% of the UK, its is particularly popular with foodies. Duck and venison are growing in appeal amongst a more foodie and premium audience.



Question: Which of the following do you eat? Data shown is for 'meat'.

Segmentation

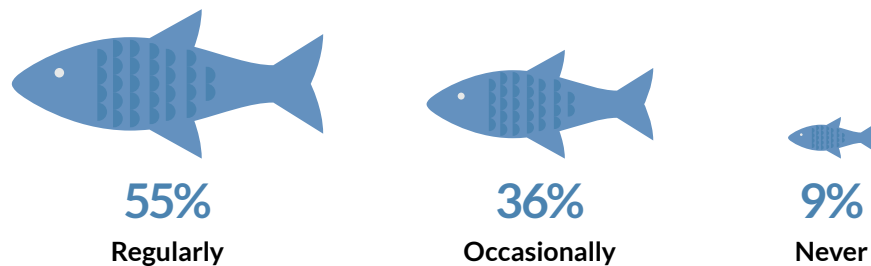
	Lamb	Beef	Venison
National	59%	76%	12%
Weekend Foodie	68%	79%	16%
Committed Foodie	71%	82%	24%
 GREAT BRITISH CHEFS	80%	91%	42%
Under 25 years old	42%	61%	9%

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

Fish consumption


Brits have always loved fish and only a tiny group claim to never cook it. Some of the most popular fish are cod and salmon but there are many more species that are being cooked by the more foodie groups. It seems that Brits are getting more ambitious as 23% are now cooking sea bass (+2% from 2017) and mackerel (+3% from 2017). The numbers increase dramatically with the more foodie groups (particularly the Great British Chefs audience), even amongst the more niche and premium items.

National



Question: Which of the following do you eat? Data shown is for 'fish'.

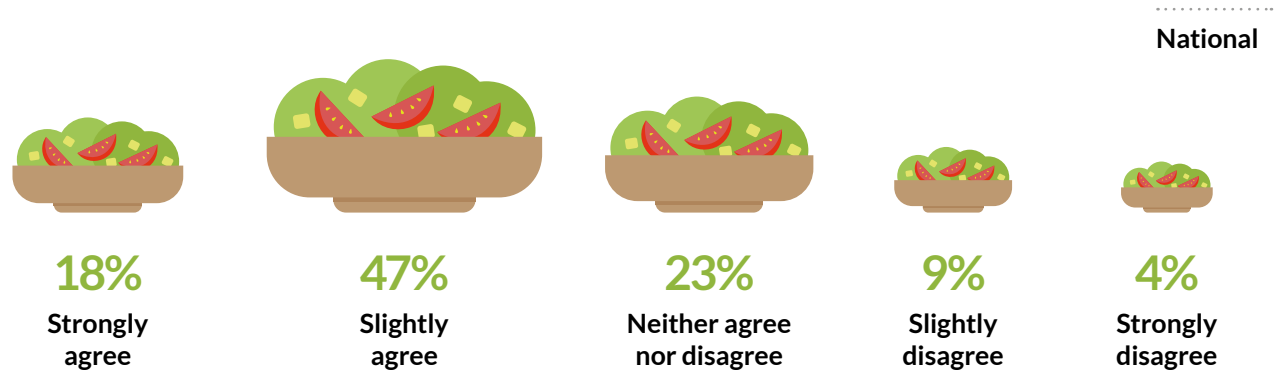
Segmentation

	Sea bass	Mackerel	Salmon	Monkfish
National	23%	23%	53%	6%
Weekend Foodie	32%	31%	64%	8%
Committed Foodie	42%	40%	69%	15%
 GREAT BRITISH CHEFS	55%	49%	78%	25%
Under 25 years old	17%	12%	47%	6%

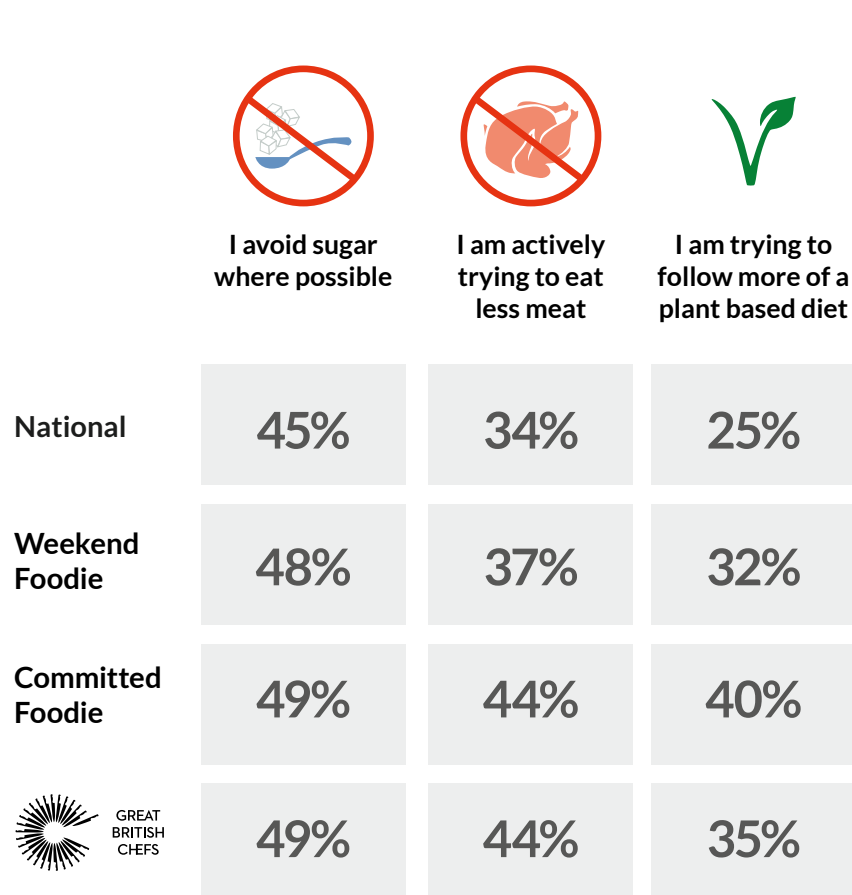
Question: Which of the following have you cooked in the last 6 months?

Health agenda

While the fact that our survey was completed in early January will clearly affect the results, it is clear that a large number of Brits are trying to live healthier lives. 34% of Brits are actively trying to eat less meat, 25% are trying to follow a more plant-based diet and 45% are avoiding sugar where possible. Interestingly, amongst the more foodie groups, this trend towards healthy eating is even more pronounced. That said, they are still prepared to enjoy unhealthy things from time to time!



Question: To what extent do you agree or disagree with the following statement about health and lifestyle: I try to eat what I know is right for me



Question: Which of the following statements do you agree with? I avoid sugar where possible; I am actively trying to eat less meat; I am trying to follow more of a plant-based diet. (agree)

Culinary tribes

There has been a significant rise in the percentage of Brits that claim to be avoiding certain types of foods. There are now large percentages of the population who identify as vegan (5%), pescatarian (7%), vegetarian (8%) and flexitarian (24%). While 11% of Brits claim they have an allergy that affects what they can eat, the reality remains that the majority of Brits claim they eat 'pretty much everything' (74%).

Segmentation

			
	Vegans	Vegetarians	Flexitarian
National	5%	8%	24%
Weekend Foodie	7%	11%	32%
Committed Foodie	7%	9%	26%
 GREAT BRITISH CHEFS	9%	11%	33%
Under 25 years old	9%	14%	27%
Socio-economic group AB	5%	8%	28%

Question: Which of the following statements do you agree with? I am a vegan; I am vegetarian, I am a flexitarian. (agree)

The eating habits of Brits are changing rapidly and it is vital that brands remain connected to this. Great British Chefs provides its clients with an ongoing stream of research to help them win in market. Get in touch to see how Great British Chefs can help you grow faster.

Emergence of protein substitutes


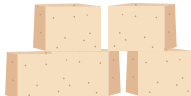
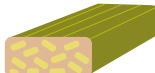


Protein substitutes are eaten by almost 50% of the population at least occasionally and this increases to over 60% amongst the more foodie audiences. Younger audiences are also far more likely to eat protein substitutes than older audiences by a significant margin. While Quorn (45%) and tofu (27%) are relatively mainstream, tempeh (10%) and jackfruit (12%) remain relatively niche.

National



Question: Which of the following do you eat? Data shown is for 'protein substitutes (e.g. Quorn)'.

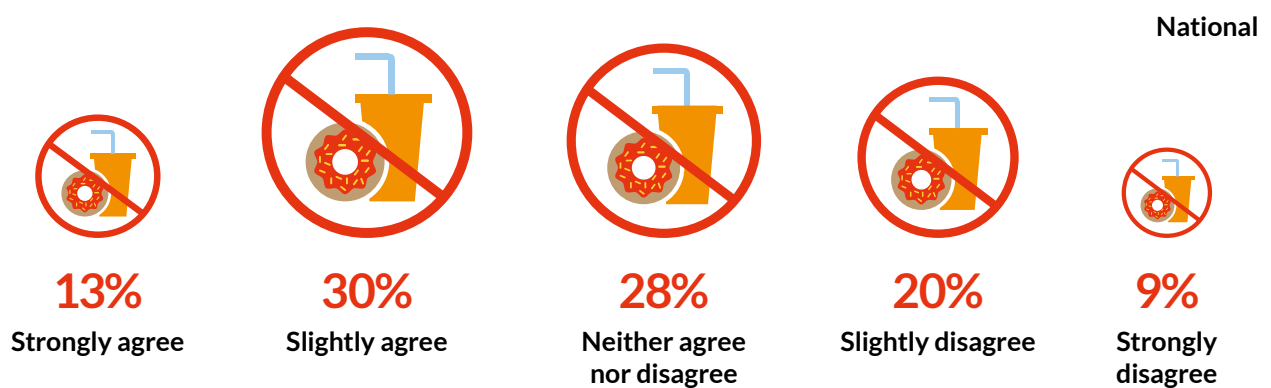
Segmentation

	 Quorn	 Tofu	 Tempeh	 Jackfruit
National	45%	27%	10%	12%
Weekend Foodie	54%	38%	17%	18%
Committed Foodie	63%	49%	23%	24%
 GREAT BRITISH CHEFS	58%	47%	24%	28%
45-54 years old	43%	24%	4%	5%

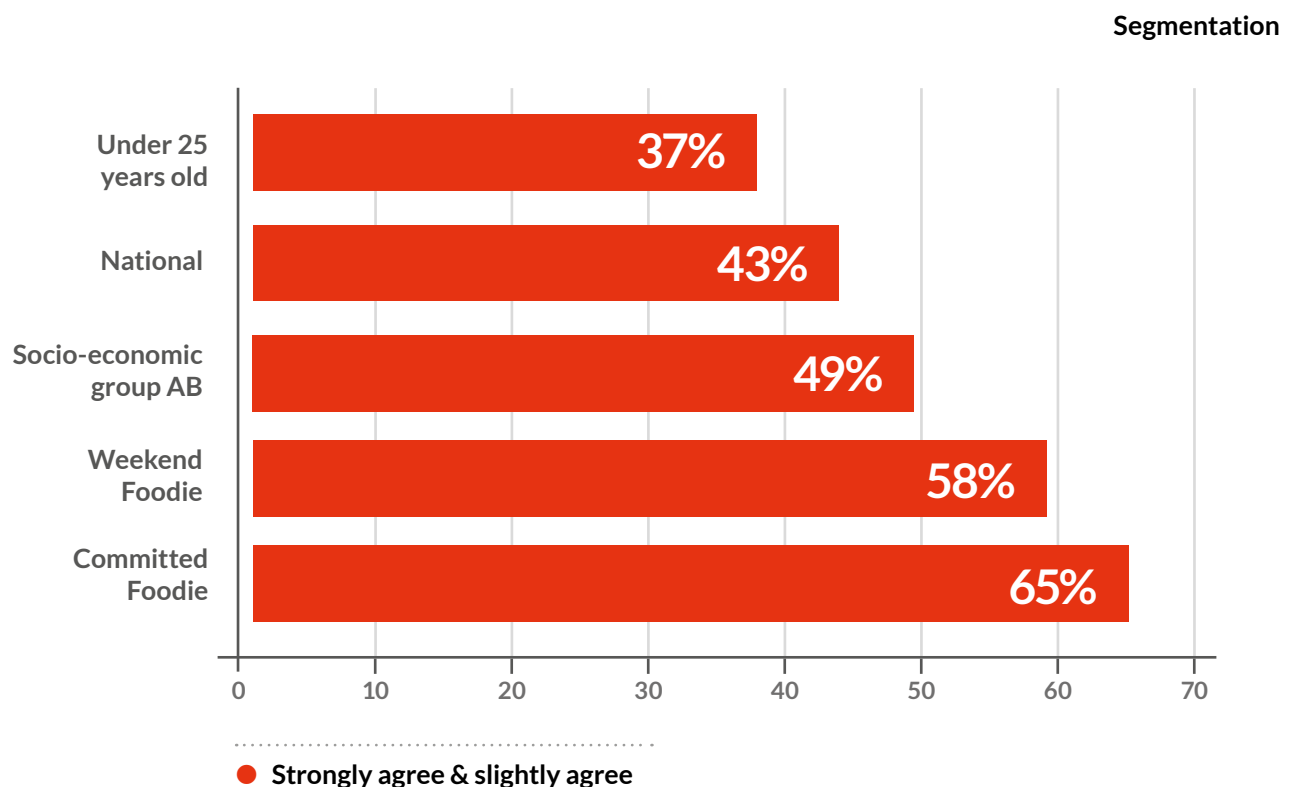
Question: Do you use any of the following protein substitutes? Data shown is for 'regularly' and 'occasionally'.

Avoiding processed food

43% of consumers say they tend to stay away from processed and prepared foods, with the more foodie groups avoiding processed foods the most. This is leading to significant groups of people embracing the DIY food revolution and making things from scratch. An impressive number of Brits have made bread (29%), cocktails (23%) and jam (15%) at home in the last 12 months. There is also a group of foodies that is fully engaged with avoiding processed food completely, choosing to make ketchup (9%), preserve fruit (8%) and even create yoghurt (7%).



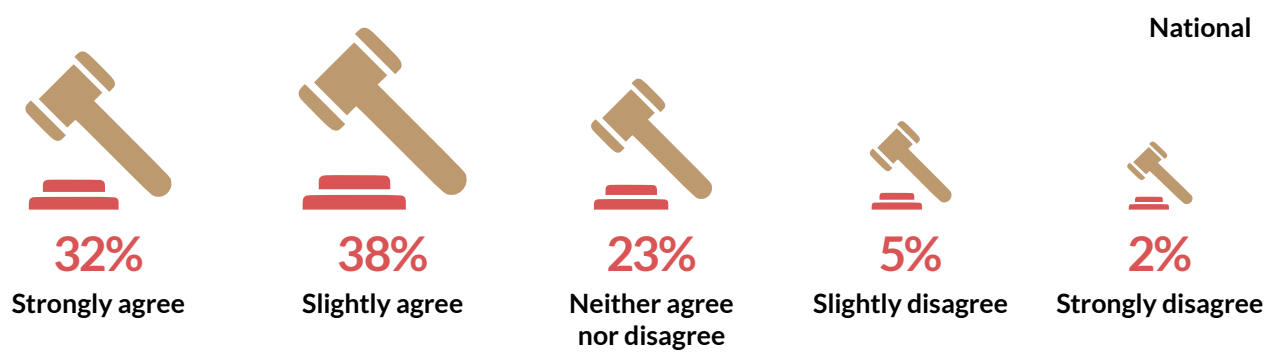
Question: *To what extent do you agree or disagree with the following statement about health and lifestyle: I tend to stay away from processed or prepared foods*



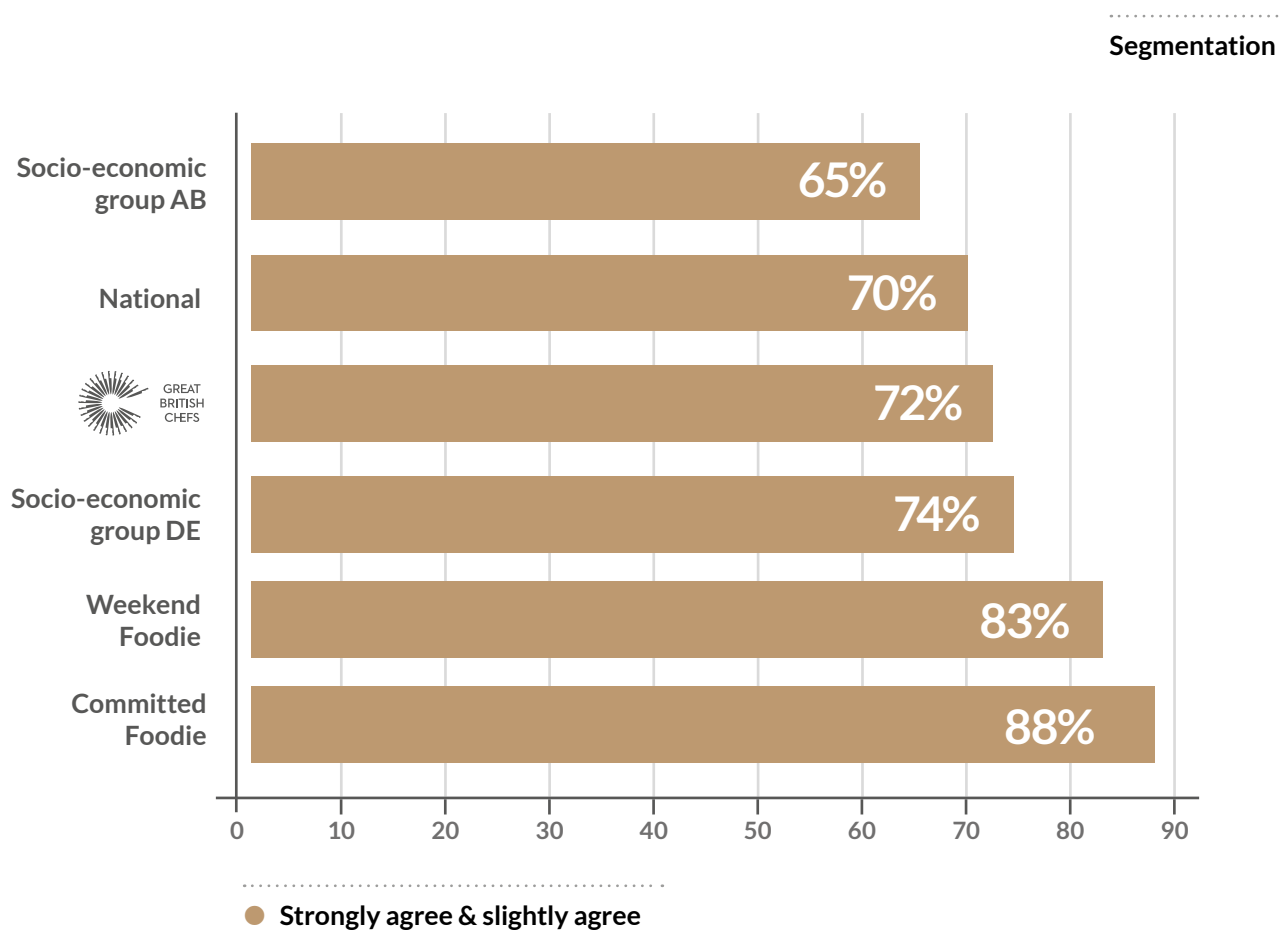
Great British Chefs has deep insight into the DIY food revolution and has helped a number of brands harness this growing trend. To understand how your brand can leverage our insight please get in touch.

Need for government regulation

There is a strong belief in Britain that the government should be doing more to make food safe, with 70% of Brits agreeing with the statement, 'The government should do more to ensure food in the UK is safe'. The strength of this view increases amongst women (76%) and Committed Foodies (88%). It is also interesting to note that socio-economic groups DE (74%) agree with this statement more strongly than ABs (65%). It seems likely that recent food scandals involving major companies such as 2 Sisters and older events including the horsemeat scandal have contributed to this strength of feeling.

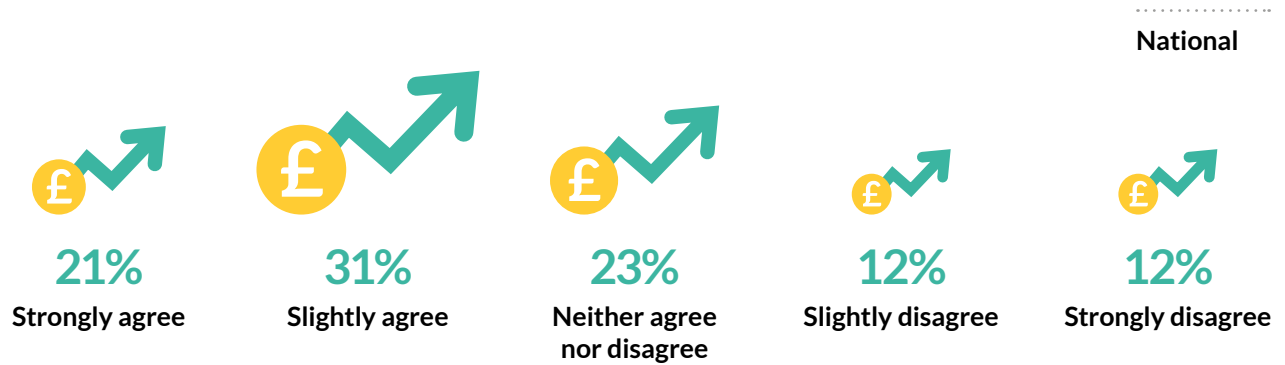


Question: To what extent do you agree or disagree with the following statement: *The government should do more to ensure food in the UK is safe*

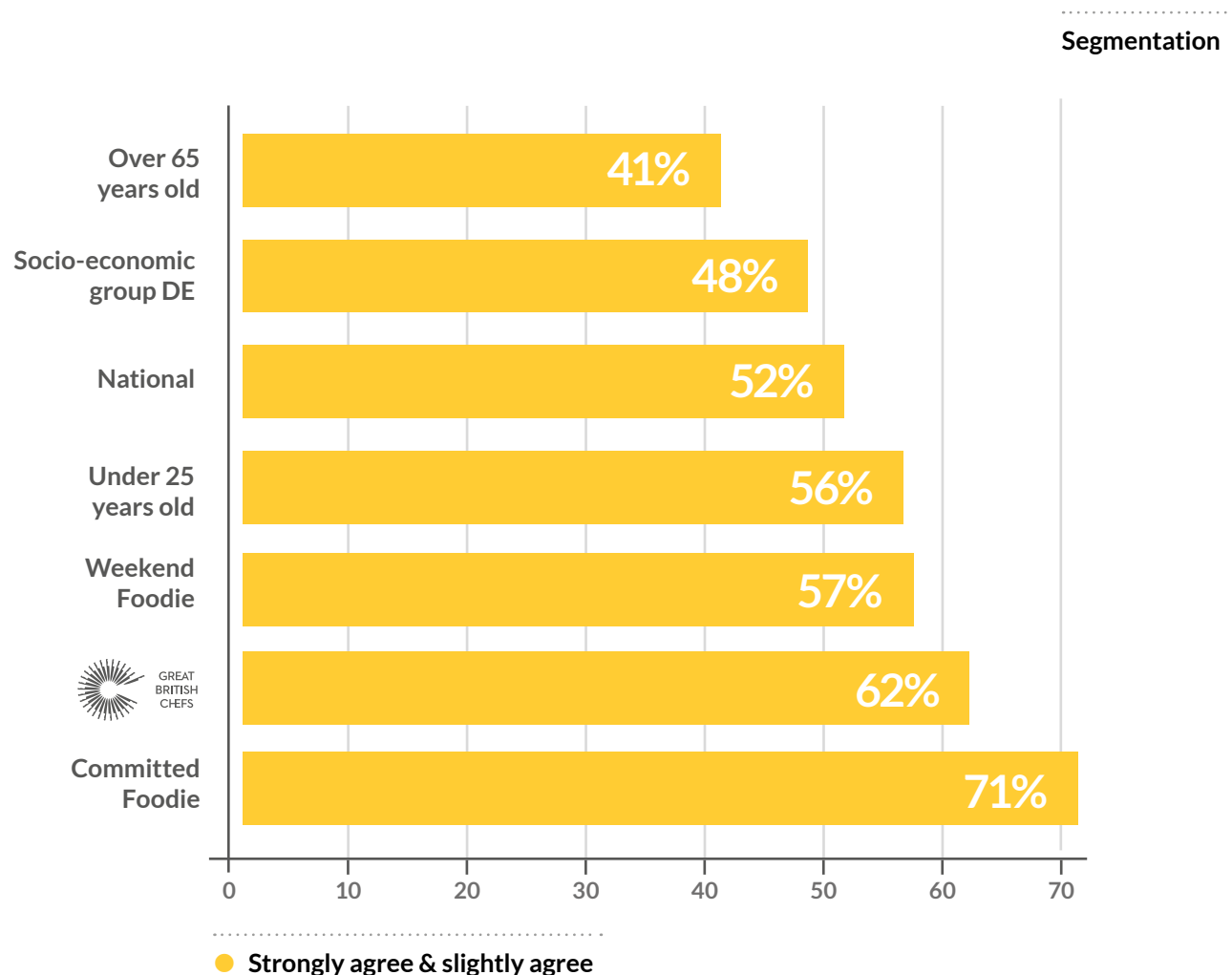


Impact of Brexit on food prices

Considering all the news surrounding Brexit, it's somewhat surprising that only 52% of Brits agree they are concerned about its potential impact on food prices. However, the more you care about food, the more this level of concern increases. Amongst Committed Foodies this increases to over 70%, while for Home Cooks this decreases to less than 50%. Women and younger audiences are also significantly more concerned than older audiences and socio-economic groups DE.

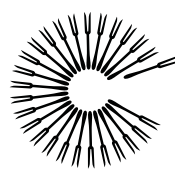


Question: To what extent do you agree or disagree with the following statement: *I am worried that Brexit will cause a significant rise in food prices*





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