



GREAT
BRITISH
CHEFS

UNDERSTANDING BRITAIN'S LOVE AFFAIR WITH FOOD

GREAT BRITISH CHEFS INSIGHT



Summary

Over the last 20 years, Britain has developed a taste for great food. The number of quality restaurants has increased dramatically, cookery programmes dominate TV schedules, supermarkets stock an ever-expanding selection of niche brands, and there are specialist food shops across the whole of Britain. We wanted to understand the depth and breadth of this revolution and put hard numbers behind various conflicting theories. Some imply that Brits can't cook and that we are still a nation of couch potatoes, while others celebrate a mass return to cooking from scratch and herald the so-called 'foodie revolution'.

In April 2017, Great British Chefs commissioned Survey Sampling International (SSI) to run a national survey of 48 questions, with the goal of understanding the UK food landscape and providing the data to get to the bottom of these debates. The survey was completed by 2,007 consumers who were recruited to reflect the UK population from a socio-economic, regional perspective (18–74).

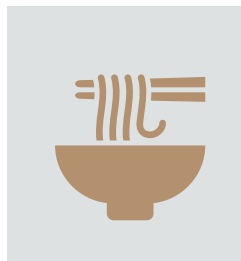
The picture that emerges is aligned with the so-called 'foodie revolution', where 66% of Brits claim to see food as one of the great pleasures in their life. In addition, 67% of Brits agree that they like cooking new recipes and 68% either love or enjoy cooking. When you dig into who really enjoys watching food TV, it is those who are cooking from scratch and looking for inspiration – not couch potatoes.

Using the responses of the nationally representative sample of 2,007 people, a series of 10 attitudinal statements emerged as central to our food-centric UK segmentation.

The 10 key statements



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



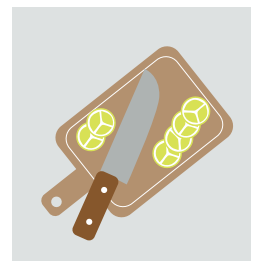
My friends expect me to know about the latest food trends



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



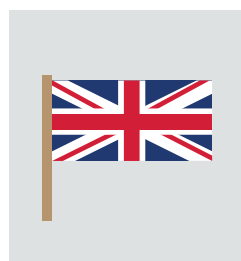
I like to try out new recipes



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

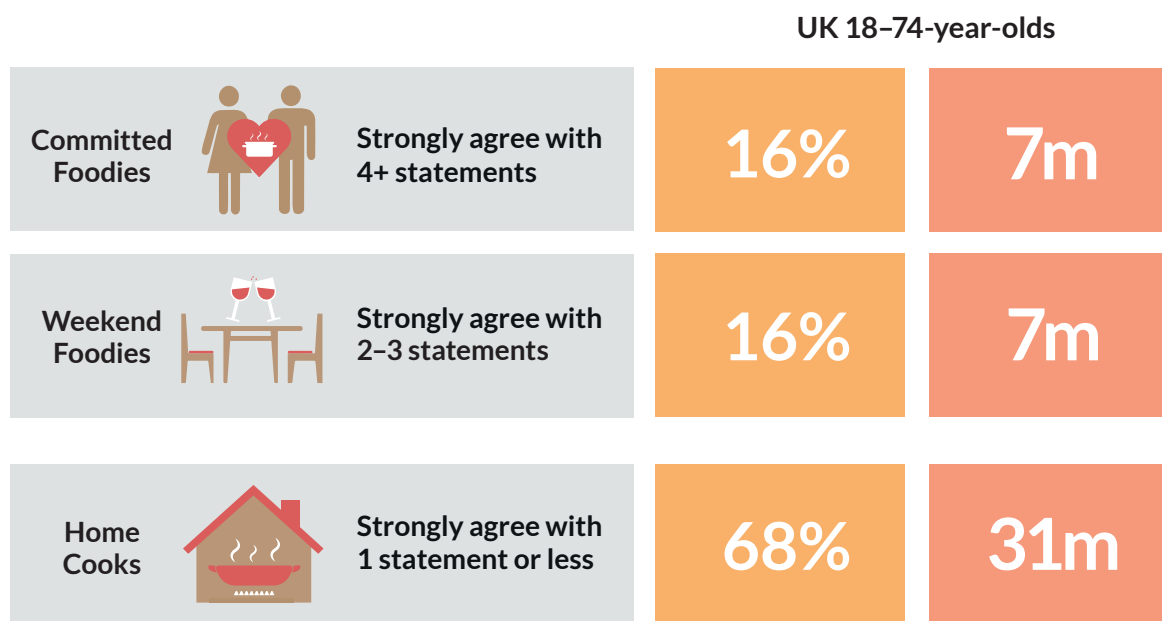


I enjoy trying gourmet food in expensive restaurants

The segments

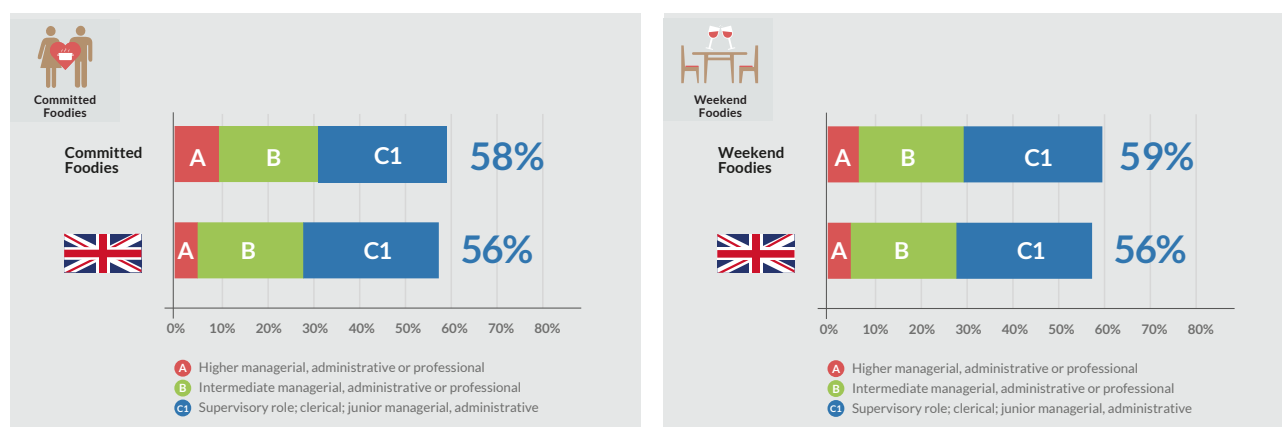
Using these 10 statements, three specific segments emerge that have clearly differentiated approaches and attitudes. We have named three segments: ‘Committed Foodies’, ‘Weekend Foodies’ and ‘Home Cooks’.

The focus of this paper is very much on the two foodie segments (Committed Foodies and Weekend Foodies) which together account for 14 million people (32% of the UK 18–74-year-old population). The third segment (Home Cooks), being of less interest to premium food brands like ourselves, is referenced only at a topline level.



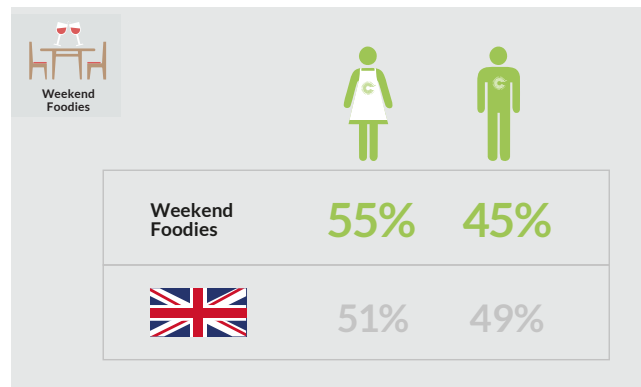
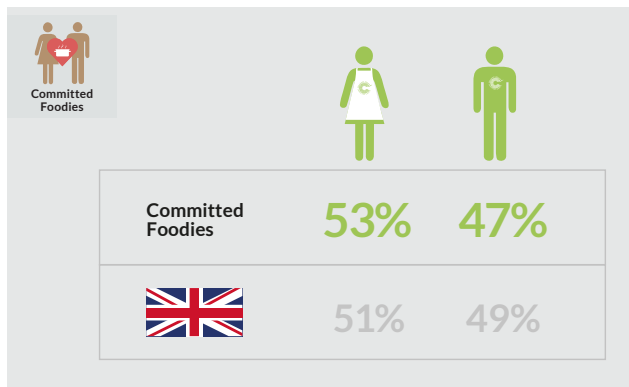
One of the first things that emerges out of this segmentation is that a number of key myths need to be challenged. It has always been assumed that foodies are older, wealthier and based in London. The reality is altogether more complex and interesting.

Demographic group



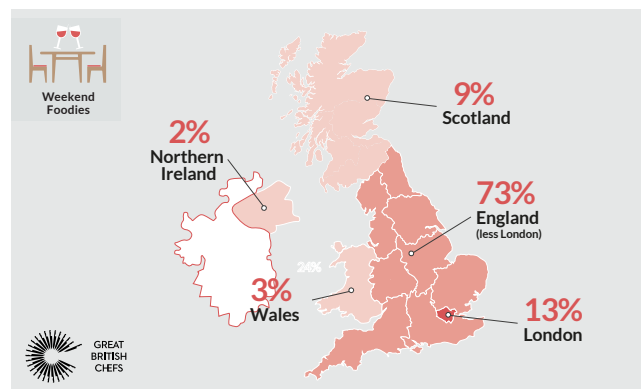
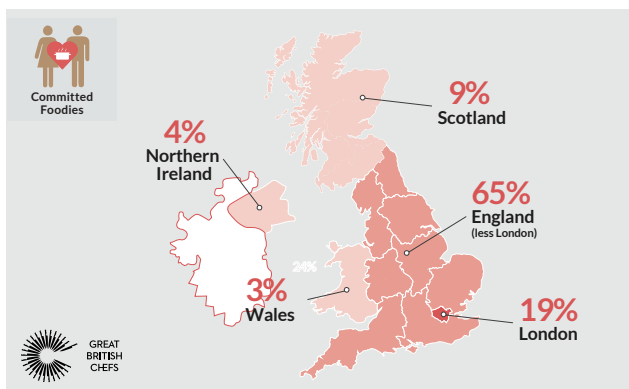
The assumption that foodies and ABC1 are synonymous is completely untrue. While wealth plays a factor in the brands that foodies are prepared to invest in, 42% of ‘Committed Foodies’ and 41% of ‘Weekend Foodies’ are not ABC1. When food is a passion, people are prepared to spend a bit more to get premium products and ingredients. Consumers do not spend rationally when they love something, and foodies **love** food.

Gender profile



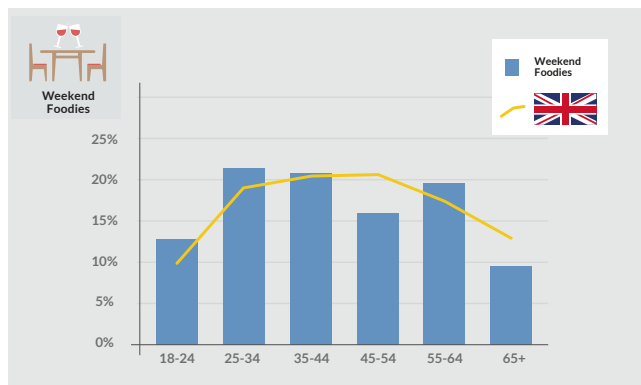
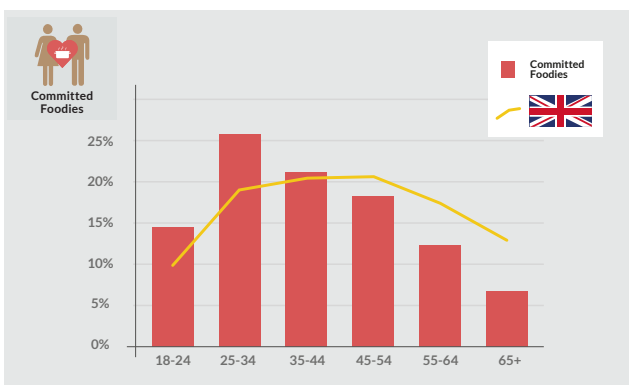
It has also become clear that the foodie world is increasingly gender-neutral. In fact, amongst 'Committed Foodies', 53% are female and 47% male, whilst amongst 'Weekend Foodies', the percentage of females increases to 55%. While we have discovered gender differences in previous studies (for example, men liking techy products such as sous vide machines and spending more on ingredients), the love of food does not seem to have a gender bias.

Regional breakdown



Too often brands only target London to reach foodies, and yet 81% of 'Committed Foodies' and 87% of 'Weekend Foodies' live outside the capital. Foodie brands that want scale need national distribution and need to appeal to and engage foodies across the UK.

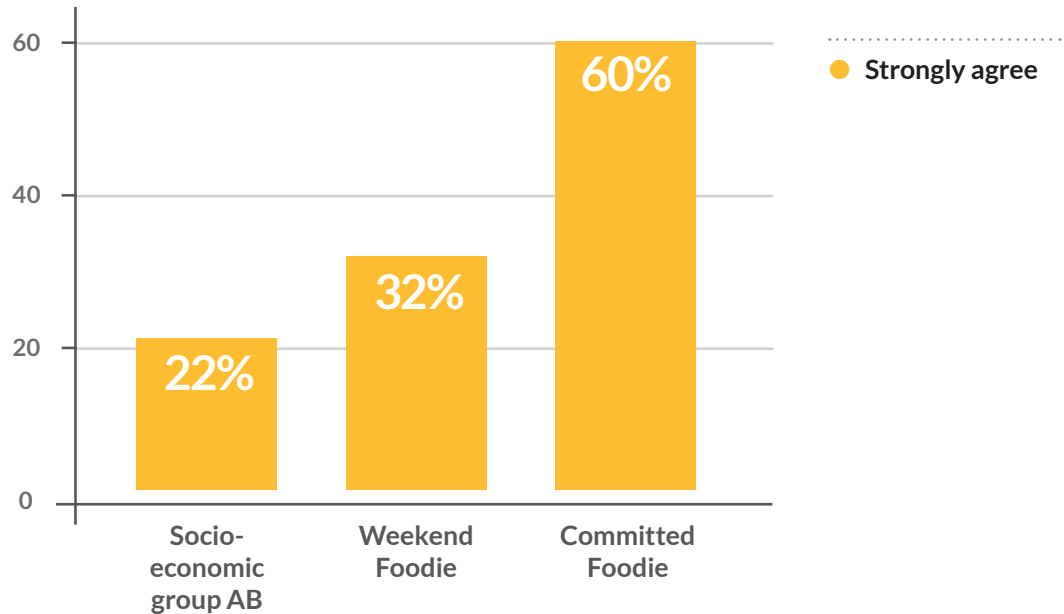
Age profile



Finally, it has always been assumed that the younger generations are not foodie and are not cooking at home. The reality is that 40% of 'Committed Foodies' and 35% of 'Weekend Foodies' are under 35 years old.

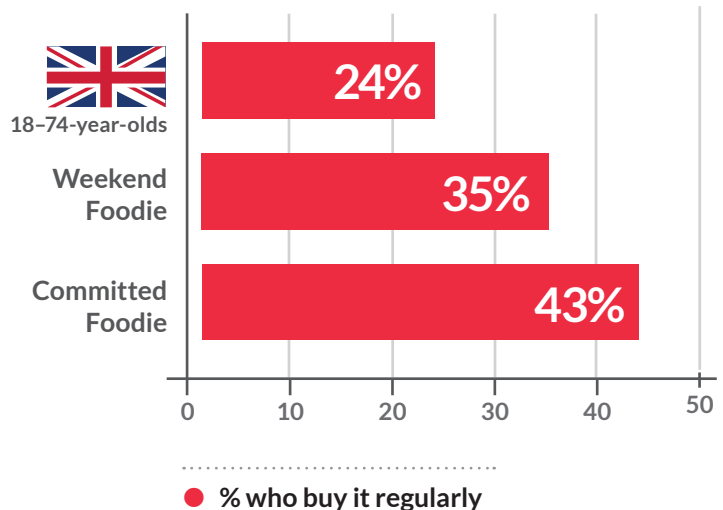
Brand purchasing

When looking at the purchasing behaviour of these two foodie segments, it is clear that they are prepared to pay for quality. 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.



Shopping habits

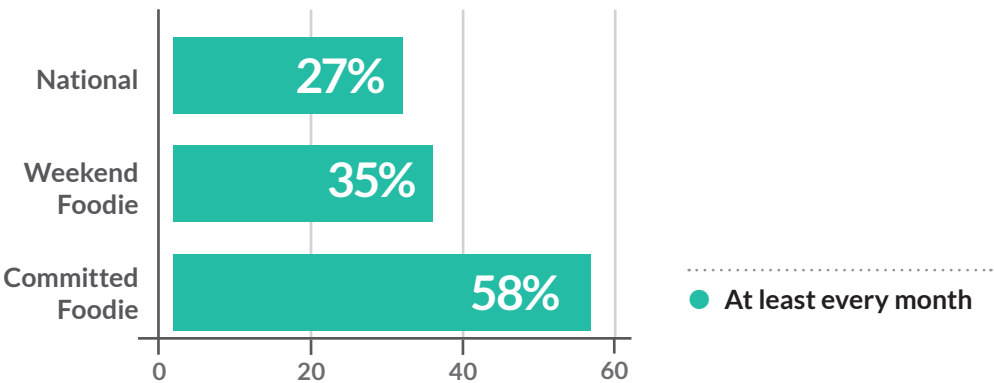
Tesco remains the destination of choice for everyone, including ‘Committed Foodies’ and ‘Weekend Foodies’. While Waitrose over-indexes significantly with this group, it is dwarfed by Tesco’s scale and reach. The Aldi and Lidl revolution has also been embraced by foodies and it is clear that their low price positioning has been a draw for foodies, not a barrier.



It is also interesting to note that ‘Committed Foodies’ and ‘Weekend Foodies’ are the key audiences for specialist outlets such as fishmongers, butchers and delicatessens. Brands that are looking to establish their presence would be well advised not to ignore these channels.

Entertaining

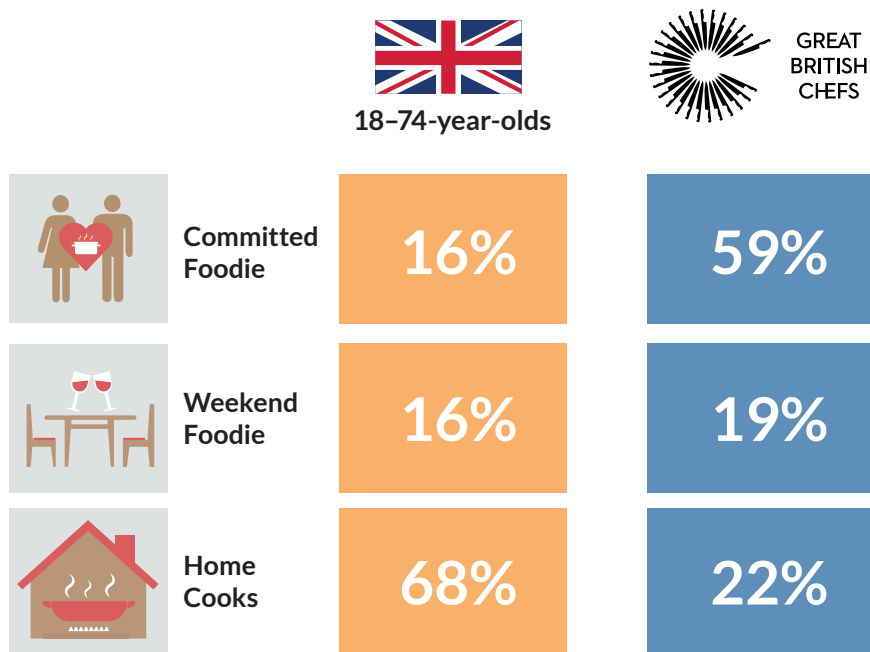
While 45% of Brits are only entertaining friends and family twice or less a year, 58% of ‘Committed Foodies’ are entertaining at least every month. It is worth targeting these entertainers as they are consuming far more food and drink than others and clearly enjoying the whole process.



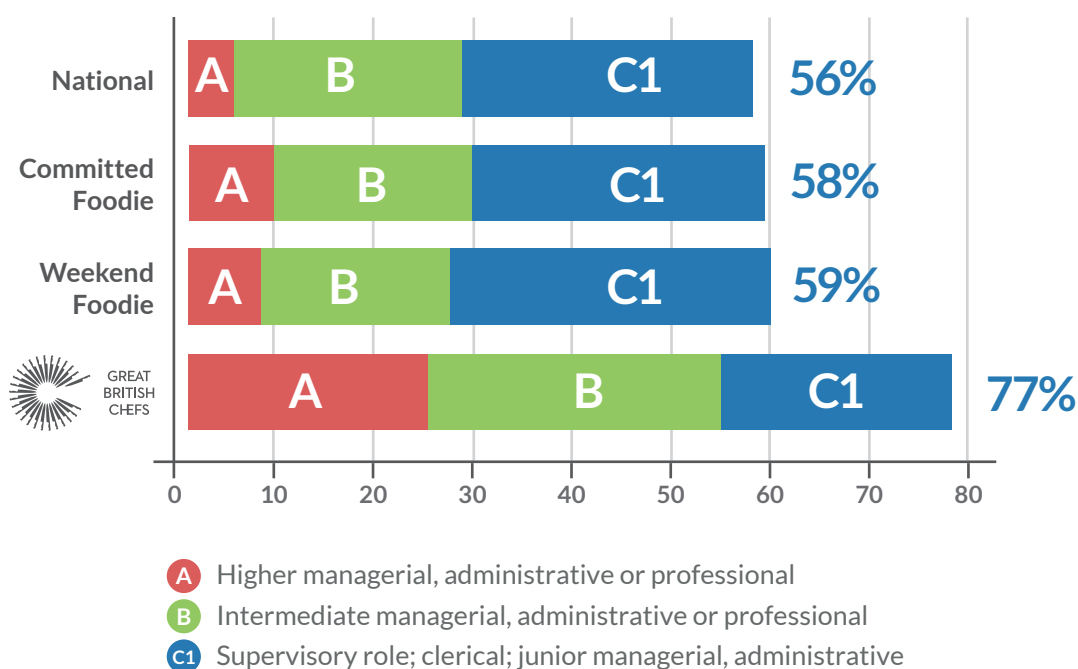
Question: Roughly how often do you invite friends and family to your home for a meal that you cook yourself?

Great British Chefs

The same survey was also conducted with the Great British Chefs audience, and 2,277 responses were collected. This was then weighted to reflect the age and gender profile of our website traffic according to Google Analytics. This sample has then been mapped against the national segmentation to understand the profile of our users. What emerges is that the vast majority of them are ‘Committed Foodies’.

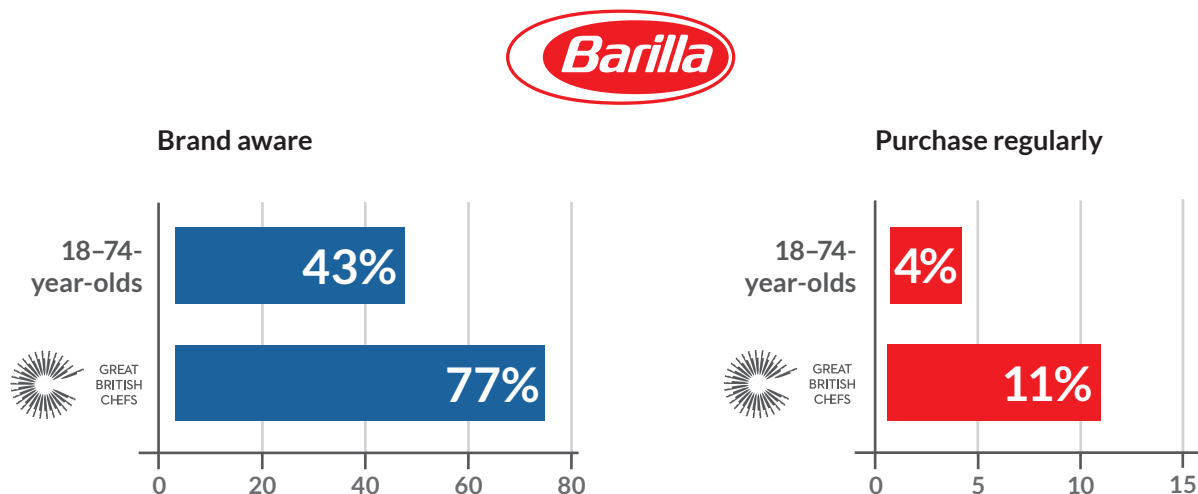


Great British Chefs’ audience is more premium than the two foodie segments and more committed to cooking a wide range of proteins. This makes our audience particularly appealing to premium brands.



Working with brands

As a business, we work with a small group of brands to help them win with foodies, by giving them the insight and advice they need to engage ‘Committed Foodies’ and ‘Weekend Foodies’. We work with these brands to develop integrated campaigns that include inspirational content and a combination of media and social outreach. A good example of a campaign is our ongoing partnership with Barilla, to help them become recognised as the leading premium pasta brand in the UK. The campaign results speak for themselves:



Today, Great British Chefs has 1 million+ followers and receives over 1.5 million site visits each month. Organic search is the key driver of visits (70%+) as foodies seek out specific premium food terms. Independent third party data shows that our audience is significantly more engaged with our content – spending longer and visiting more pages – than those who visit other UK food websites.

Visit duration (minutes)



Source: Similarweb.com
Jan-June 2017.

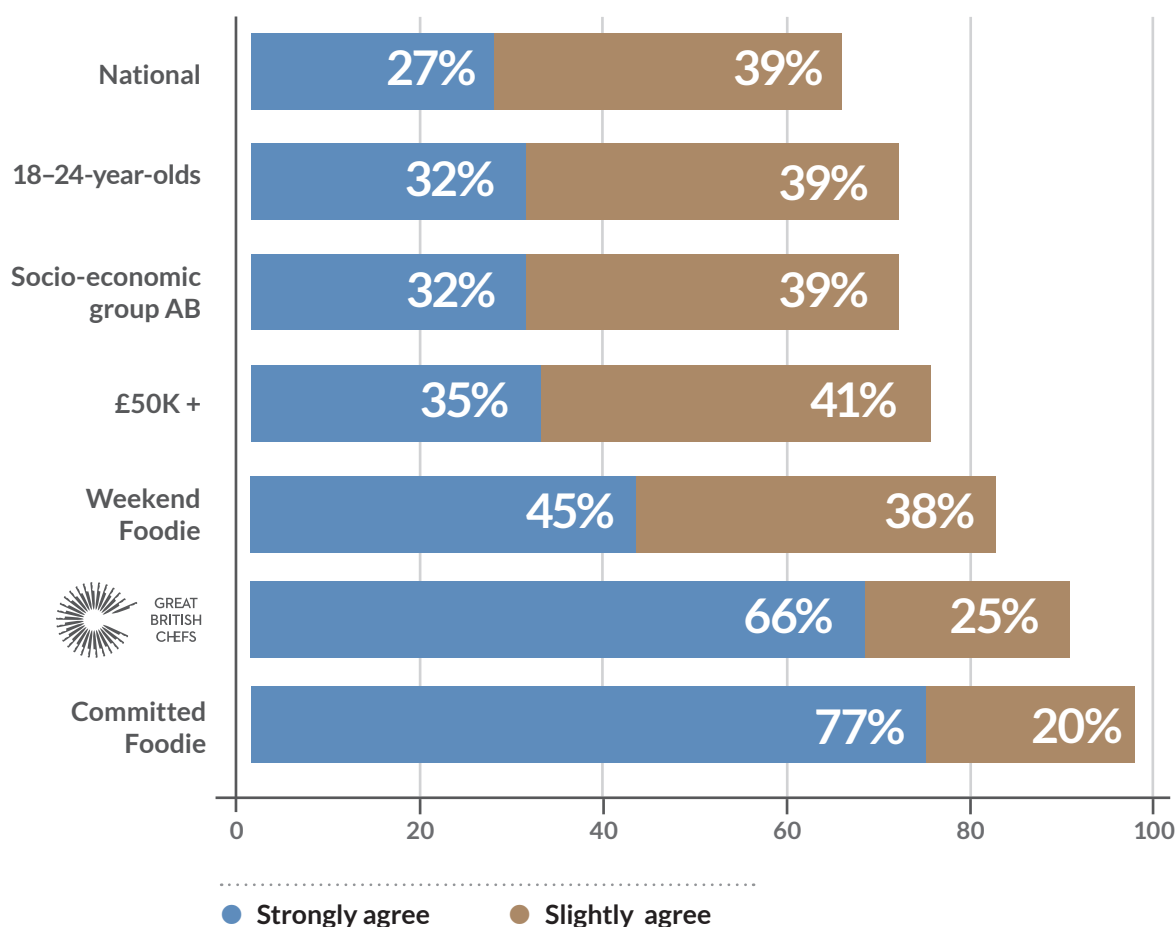
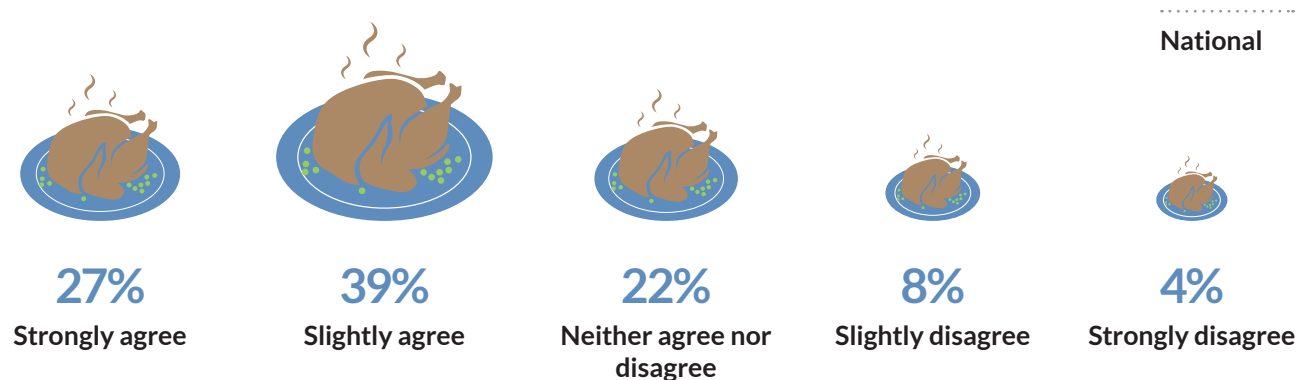
If you would like to hear more about our approach, our insight into Britain's 14 million foodies or our case studies, please get in touch.

Ollie Lloyd (CEO)
ollie@greatbritishchefs.com

The pleasure of food

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 18-25-year-olds. Perhaps unsurprisingly, 91% of Great British Chefs' foodie audience agrees that food is one of their great pleasures, with 65% strongly agreeing with the statement. This sentiment is even more extreme amongst 'Committed Foodies', with 77% strongly agreeing with the statement.

A great pleasure

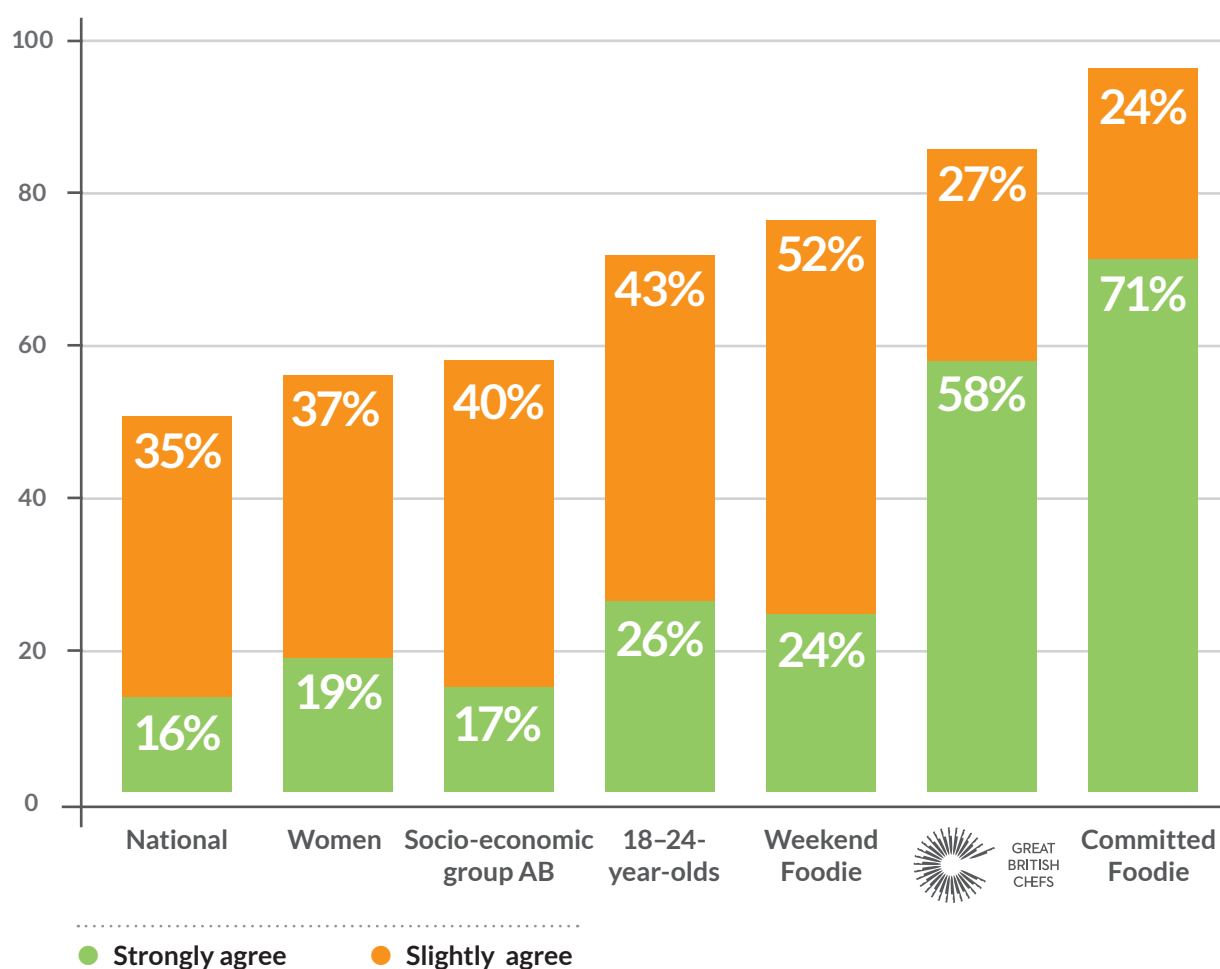
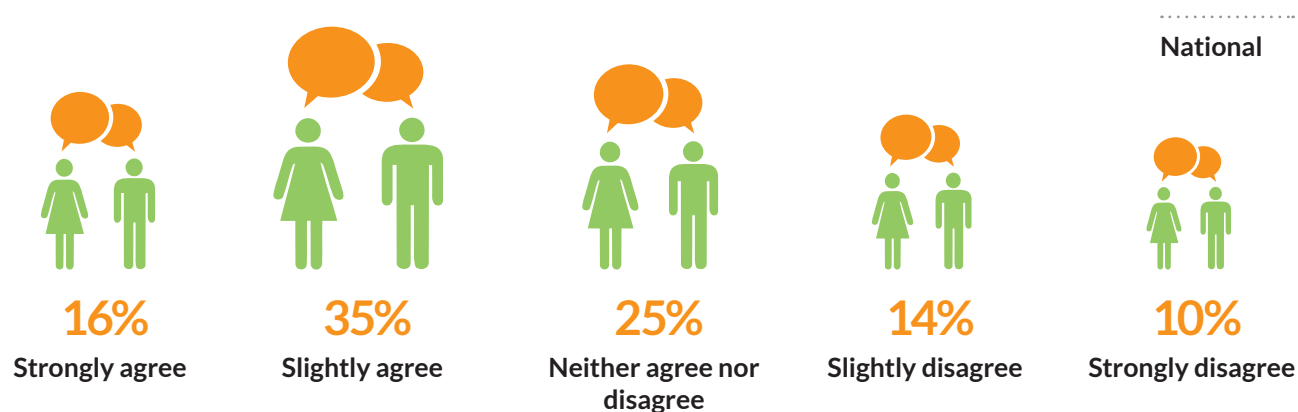


Question: To what extent do you agree with the following statement: Food is one of the great pleasures in my life

Talking food

Food is a major preoccupation 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 18–25s agreeing with the statement. Amongst the seriously foodie audiences, agreement with this statement tops 85%.

Enjoy talking about food



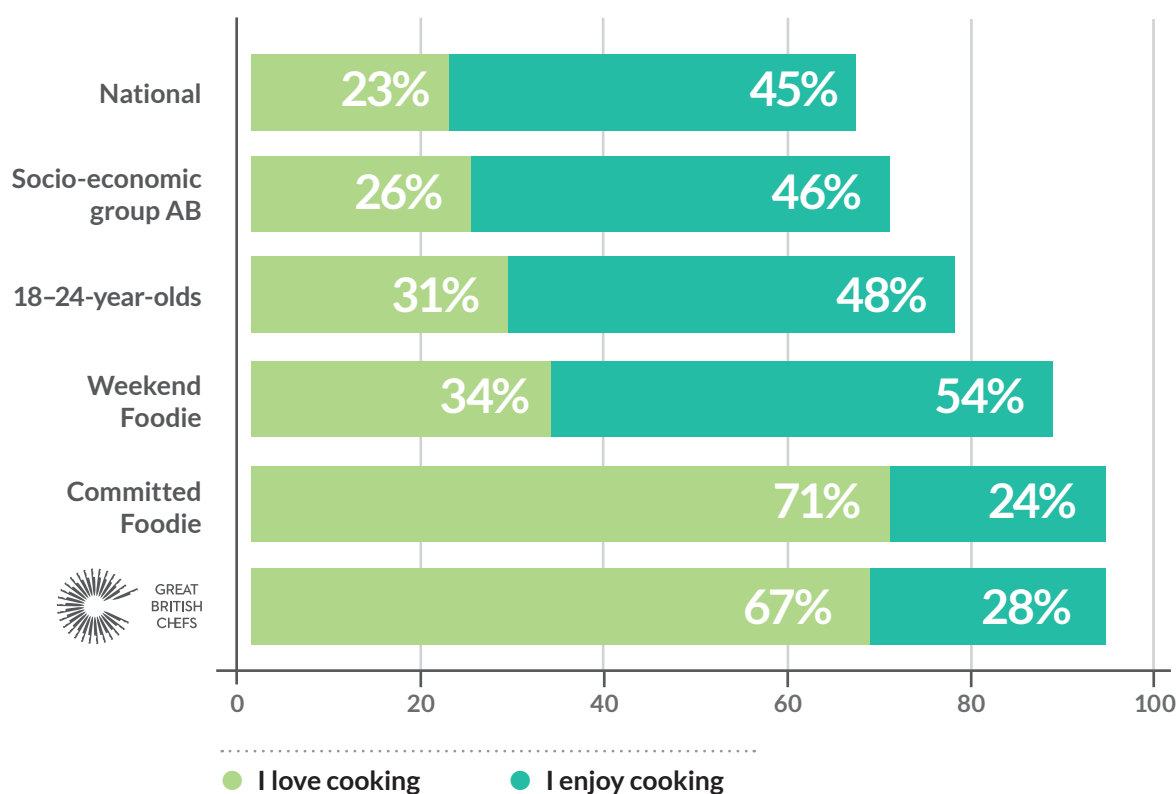
Question: To what extent do you agree with the following statement: I enjoy talking about food and planning what I am going to eat

Brits love cooking

Britain is a nation of cooks, with 68% of Brits either loving cooking or enjoying cooking. A tiny 3% actually hate cooking, with no statistical difference between men and women. The younger groups (18–25, 26–34), Londoners and those with children enjoy cooking more than the national average. Amongst ‘Committed Foodies’ and ‘Weekend Foodies’ the numbers are, unsurprisingly, significantly higher, with 95% of ‘Committed Foodies’ either loving or enjoying cooking.

Enjoyment of cooking

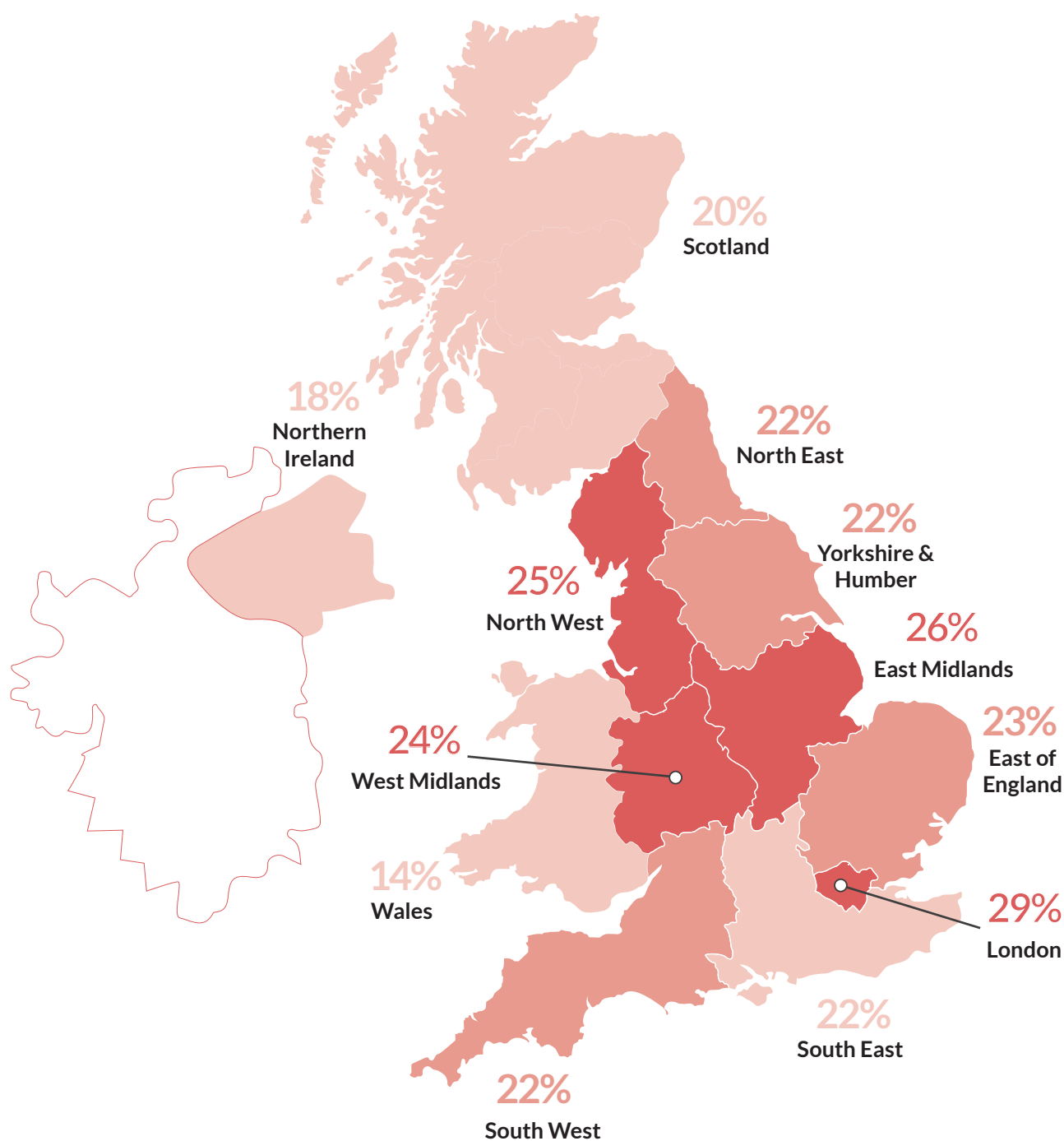
National



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, despite its enormous range of restaurants. While many assume that they should target the South to reach food lovers, it appears that northern England loves cooking more than the South overall. England as a whole, however, loves cooking far more than Scotland, Northern Ireland and Wales.



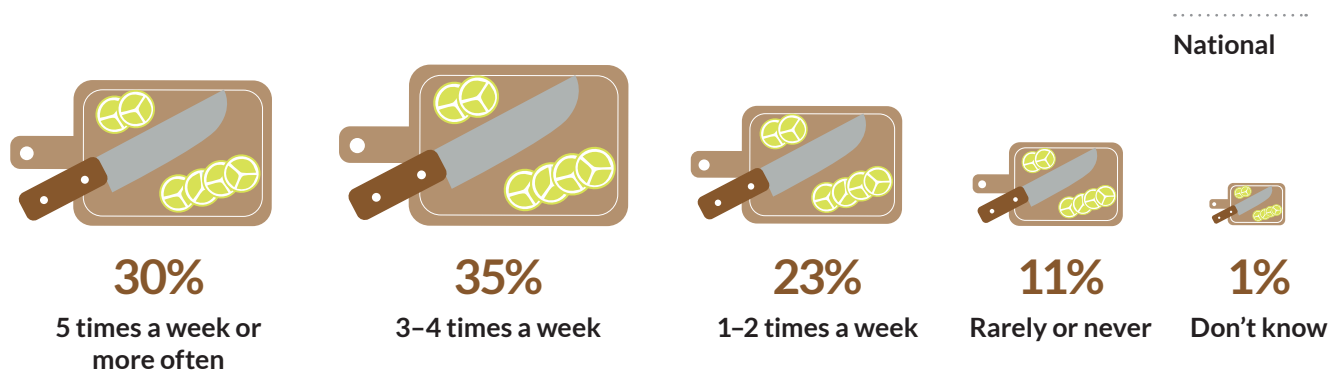
Question: How much do you enjoy cooking?

Data above shows those who chose 'love cooking'.

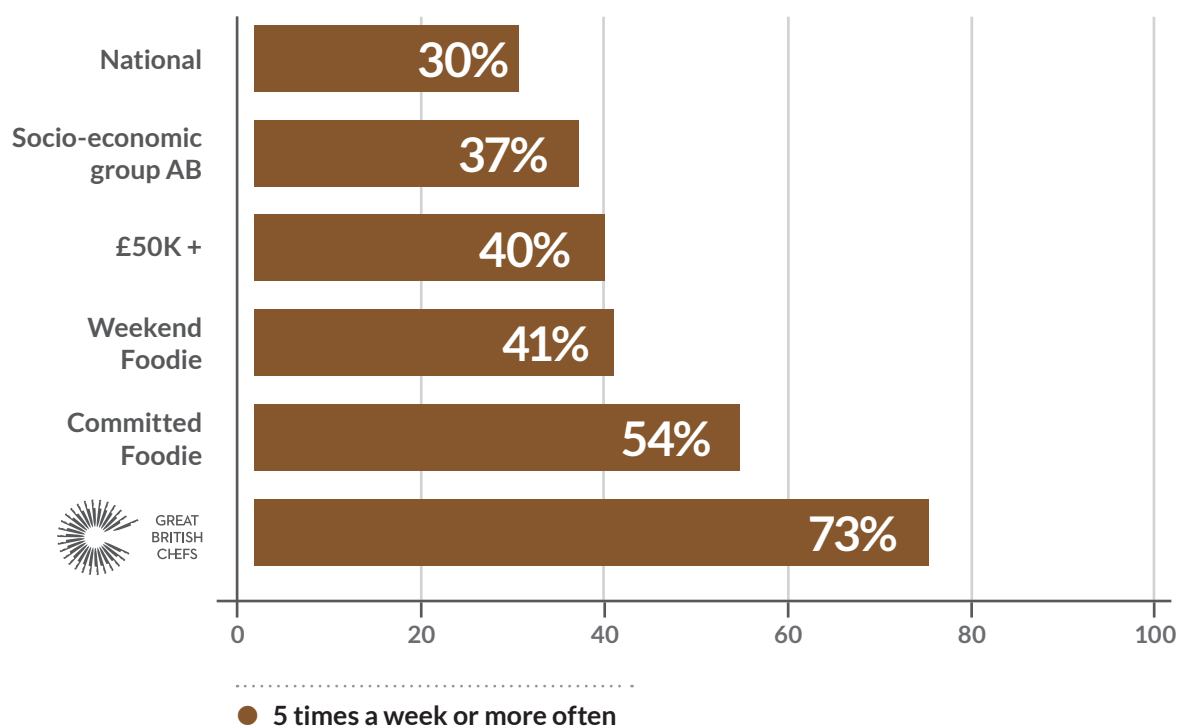
Scratch cooking

Britain is divided into a country where roughly a third cook regularly, a third cook occasionally and a third don't really cook at all. 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 and takeaways, 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, more than even the 'Committed Foodies'.

Cooking with fresh ingredients



Food brands that are looking to drive penetration would be well advised to target 'Committed Foodies' and 'Weekend Foodies'. They are cooking the most frequently and have the most scope for new product adoption.

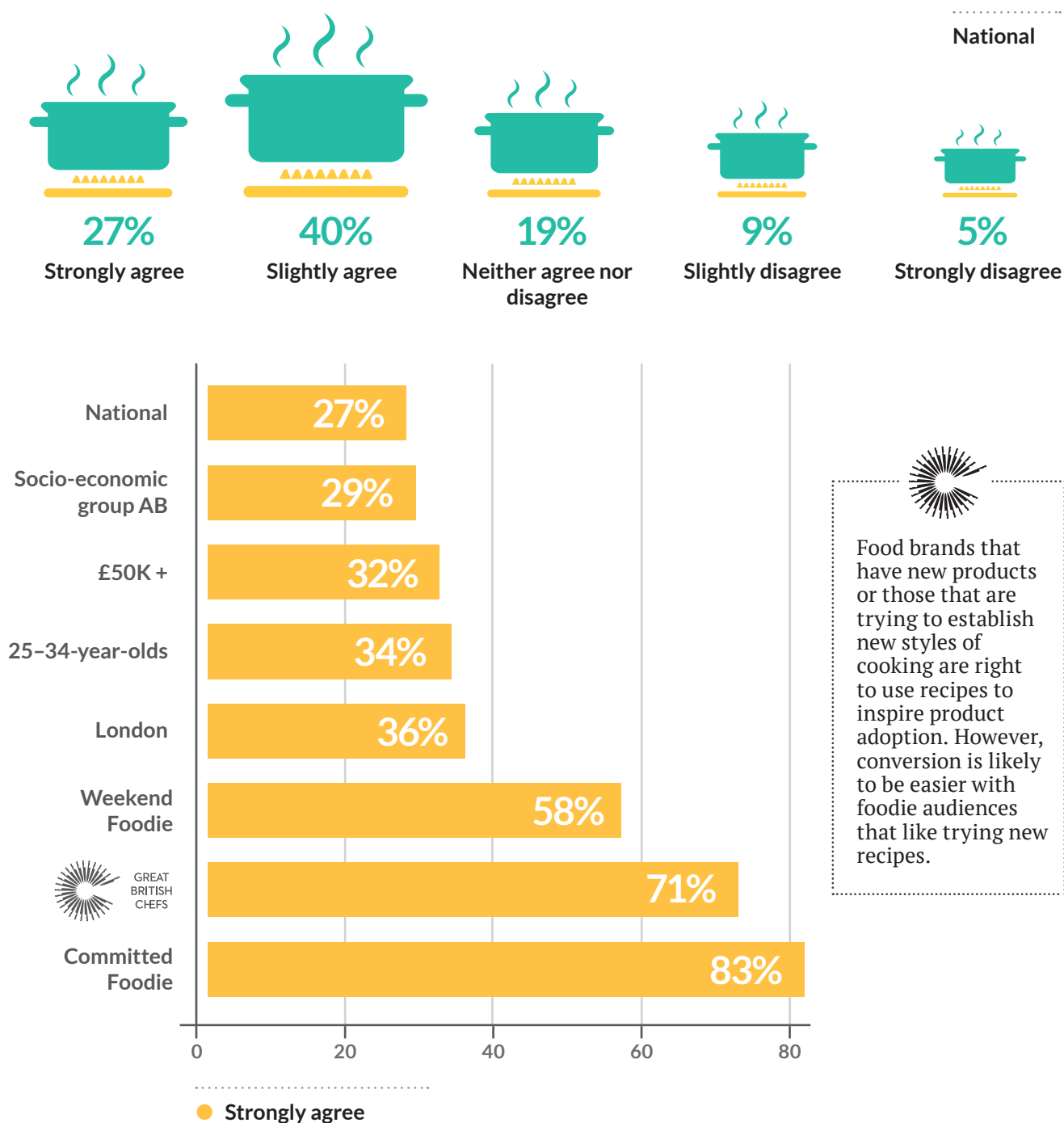


Question: In a typical week how often do you personally cook using fresh ingredients, rather than using a ready meal or pre-made sauce?

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 a new recipe, although nothing like as much as ‘Committed Foodies’ and Great British Chefs’ audience.

Trying new recipes

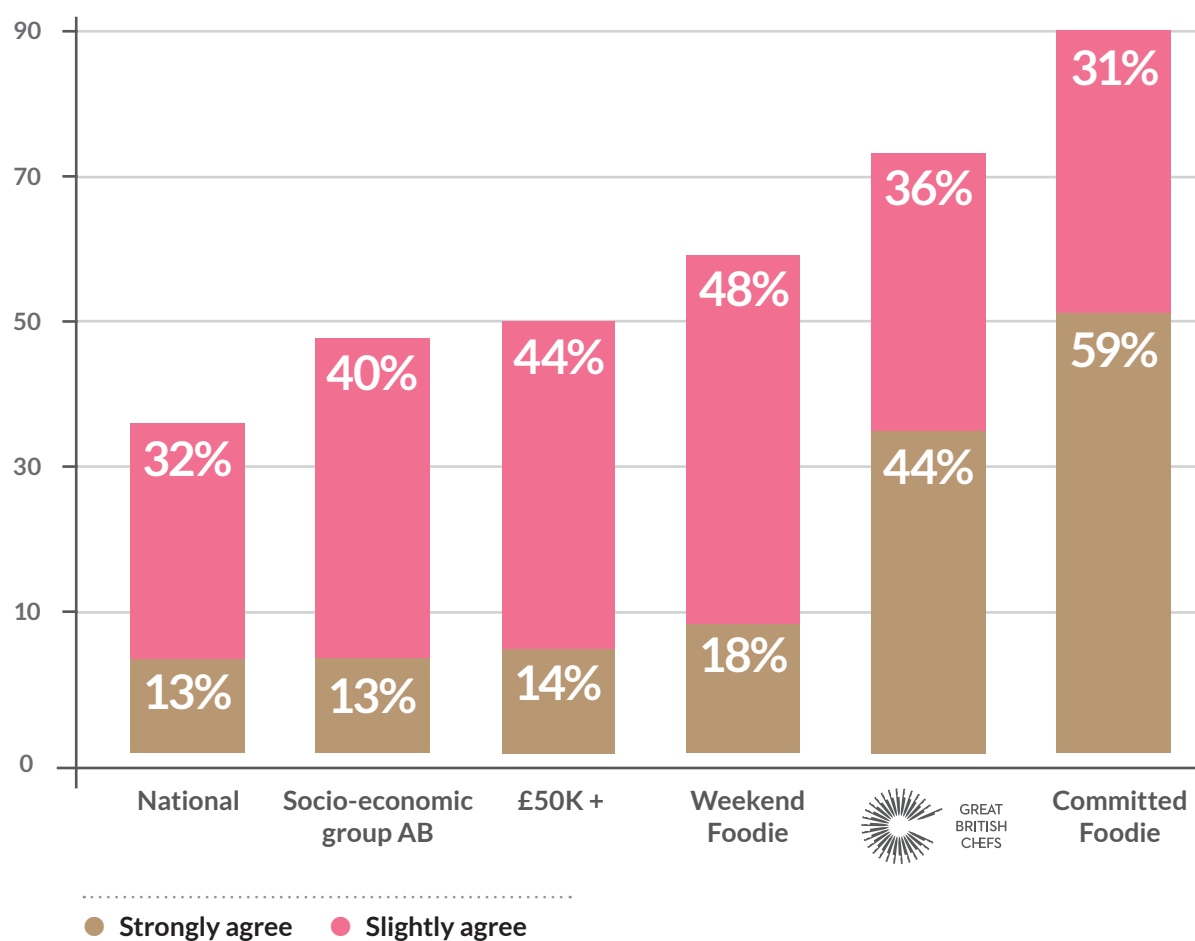
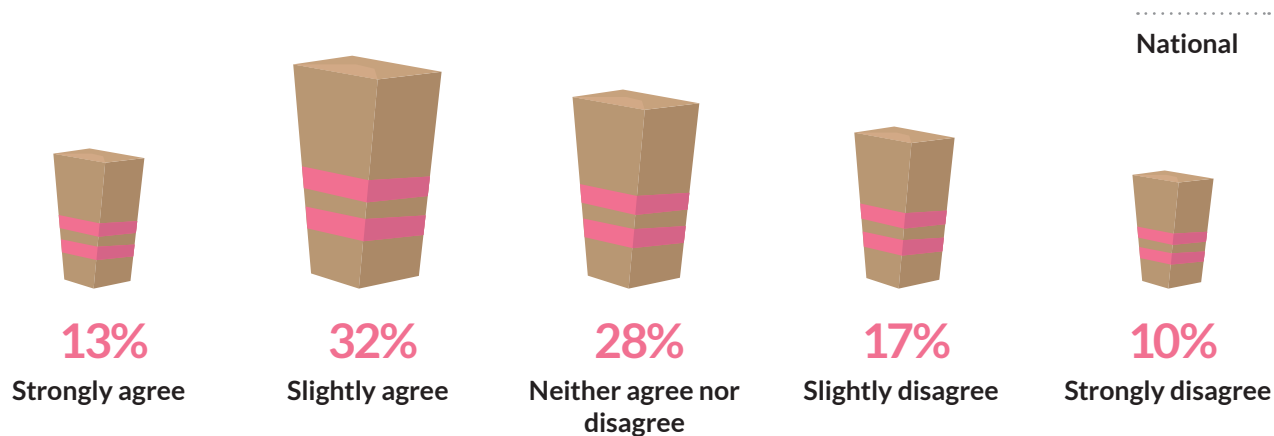


Question: To what extent do you agree with the following statement: I like to try out new recipes

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. Unsurprisingly, most of Great British Chefs' foodie audience (80%) and 'Committed Foodies' (90%) agree with this statement.

Unusual ingredients

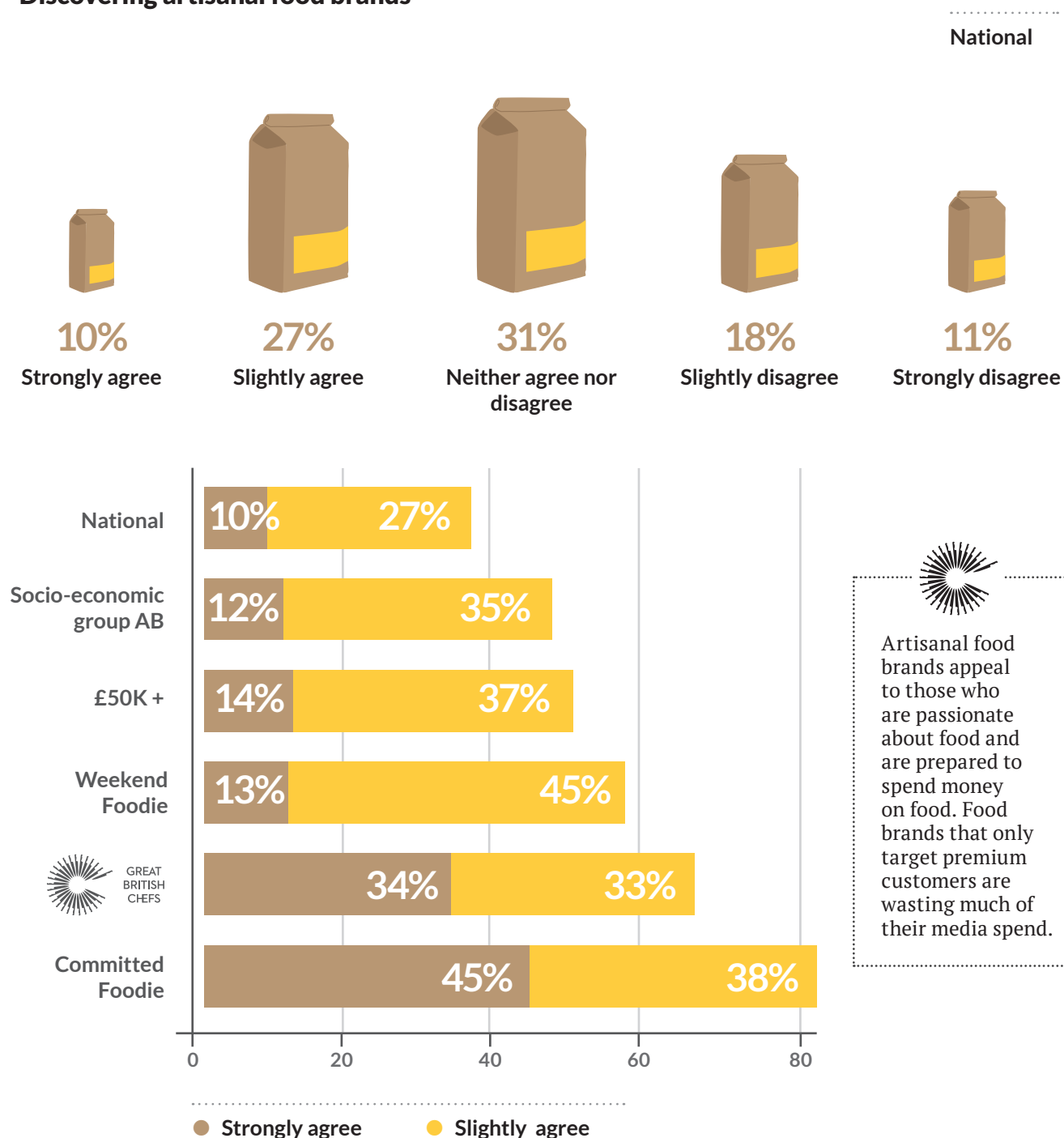


Question: To what extent do you agree with the following statement: I enjoy finding and buying unusual ingredients

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 a nation of foodies. Wealthier consumers (socio-economic group AB / households earning £50,000+) are even more likely to enjoy discovering artisanal food brands than the national average, but nowhere near as much as the more foodie segments.

Discovering artisanal food brands



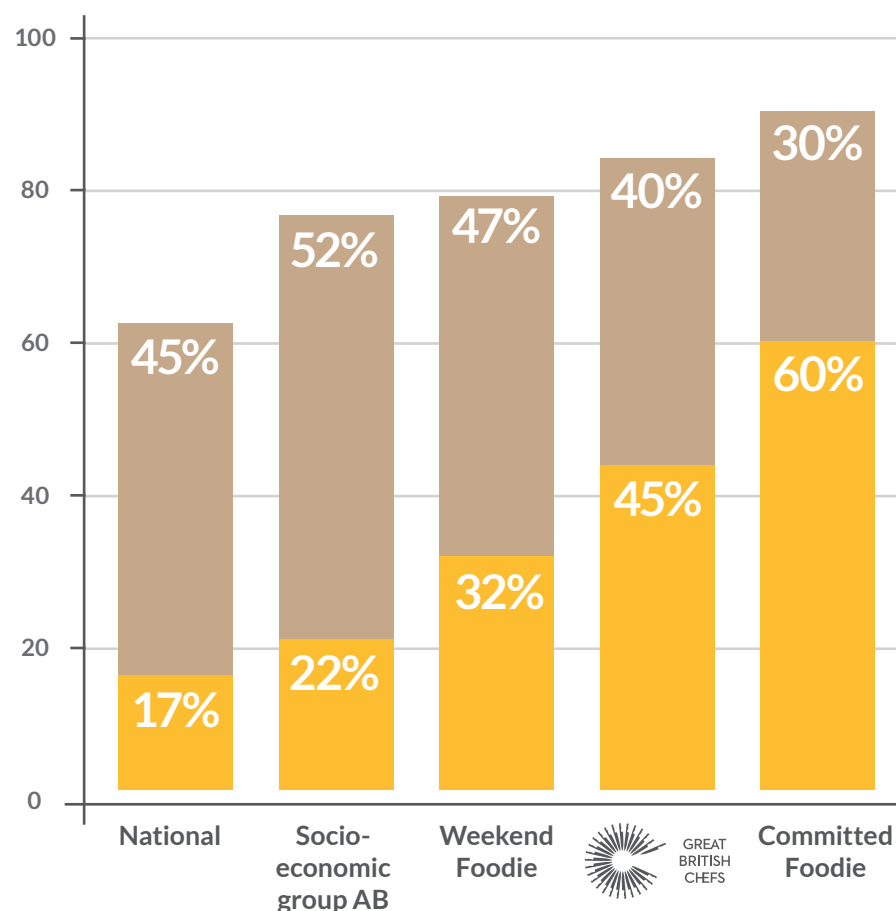
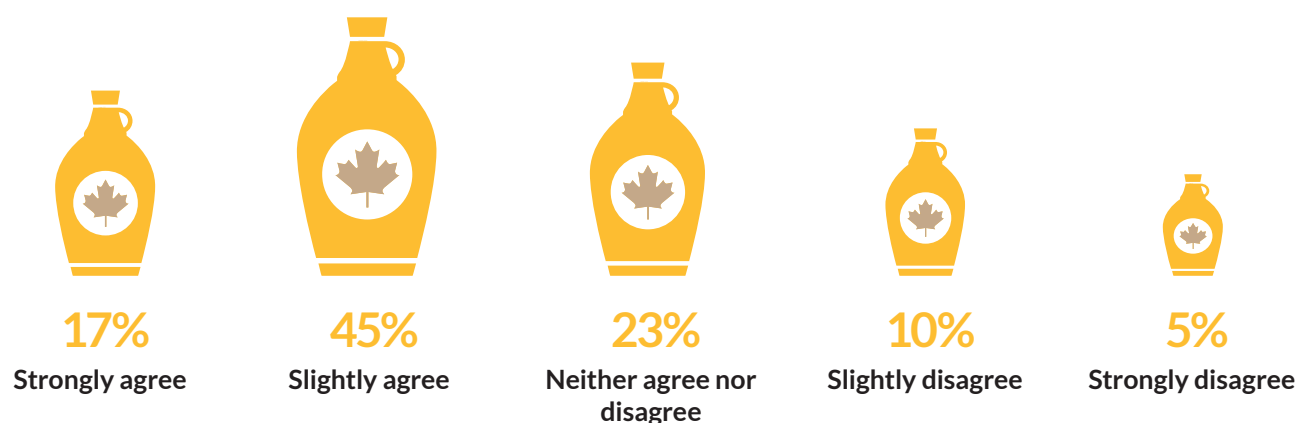
Question: To what extent do you agree with the following statement: I like discovering new artisanal food brands

Paying extra for quality

62% of the UK agree that they are happy to pay extra for quality food products. This sentiment increases to 70% amongst Londoners and 80% amongst those earning more than £50,000. For those who are truly committed to food (the Great British Chefs audience and 'Committed Foodies') this increase to over 85%.

Investing in their passion

National



Whilst more affluent consumers are naturally prepared to pay for quality, premium food-loving audiences are more committed to investing in quality food. Brands that charge more or operate in a commoditised category need to justify their premium and engage those most likely to spend on quality.

- 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

Brand purchasing

Within the surveys, we included a wide range of 13 premium food brands to understand how often they are being purchased by different audiences. Our research found that premium food brands are purchased by foodies more than any other segment. The more mass market brands have established a presence in both foodie segments but the more emerging brands are currently only purchased by the 'Committed Foodies'.

Purchasing premium brands

					
 GREAT BRITISH CHEFS	40%	31%	22%	16%	12%
Committed Foodie	48%	23%	16%	18%	12%
Weekend Foodie	37%	13%	10%	7%	4%
National	30%	9%	10%	6%	4%



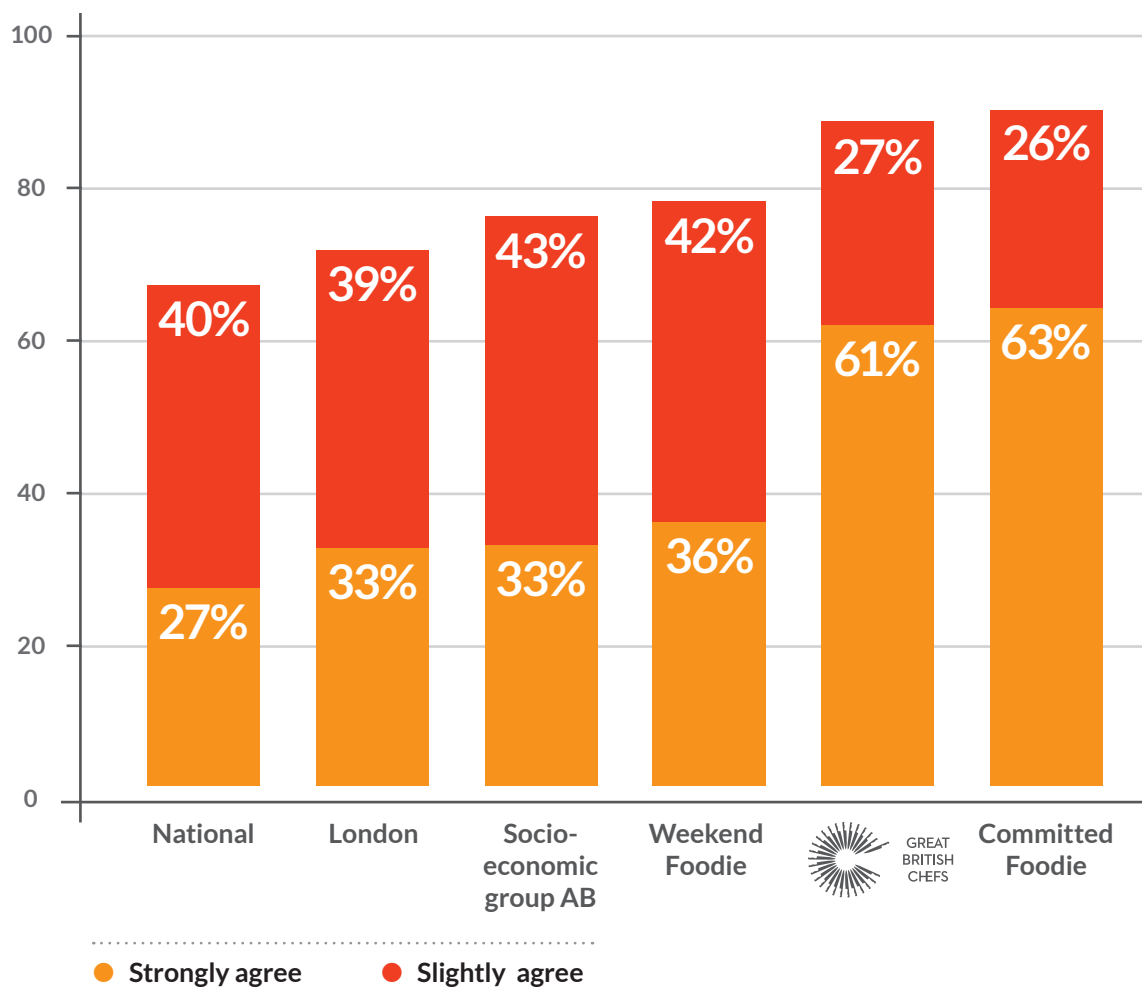
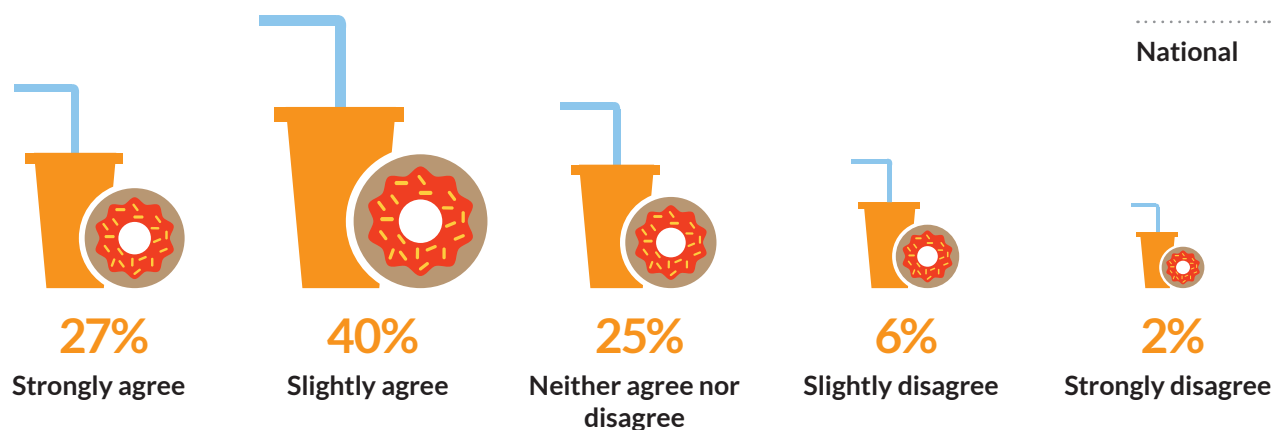
Great British Chefs specialises in helping brands reach and engage foodies. We understand what is in their cupboards, what they are cooking and their attitudes. We have a series of case studies that prove our impact. If you want to know how to grow your brand with foodies do get in touch via kieron@greatbritishchefs.com.

Question: How familiar are you with this brand?

Processed food

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

Choosing unprocessed foods



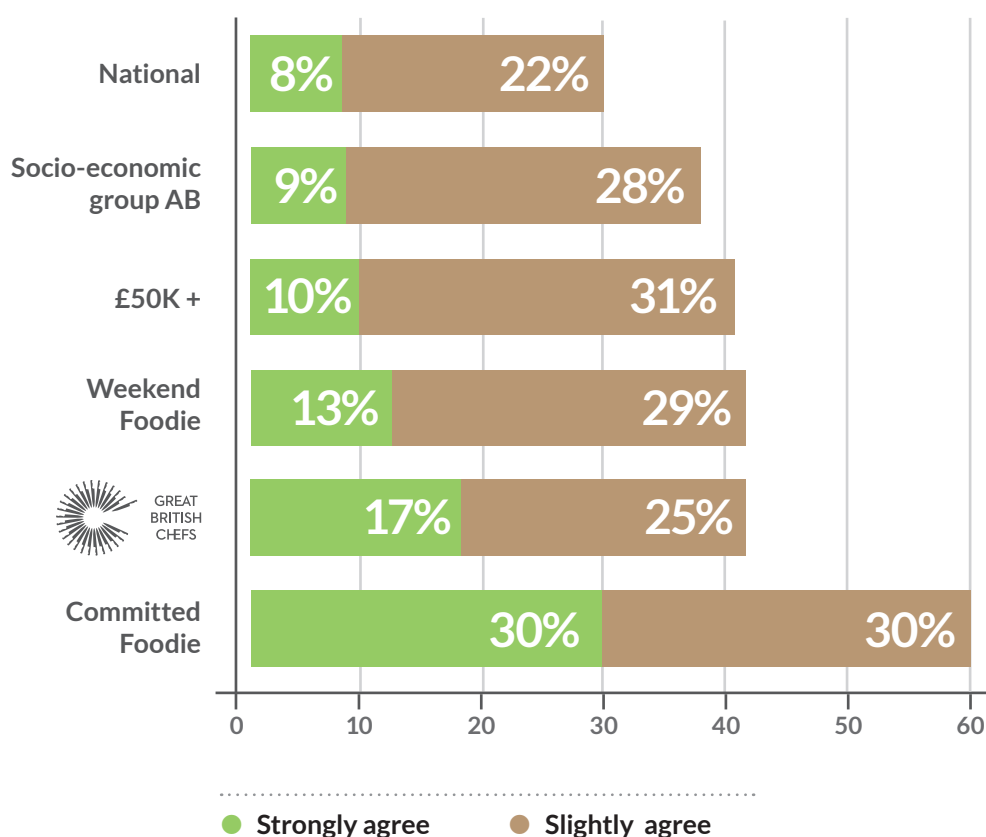
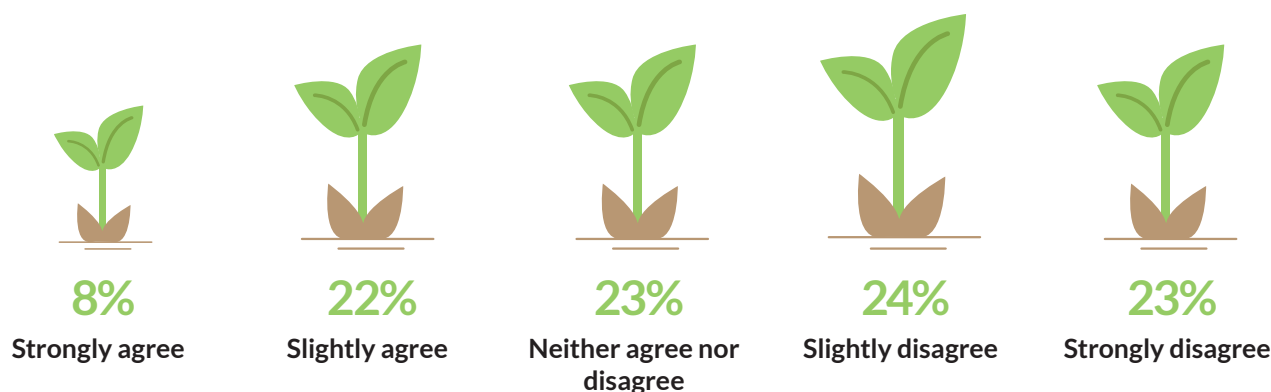
Question: To what extent do you agree with the following statement: where possible, I choose unprocessed foods rather than processed foods

Organic

Almost 30% of UK consumers claim to buy organic food regularly, which shows that the organic movement has truly broken 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 'Committed Foodies', 60% 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

Grocery shopping

Tesco and Sainsbury's remain the key retailers for 'Committed Foodies' and 'Weekend Foodies'. It is clear that Waitrose is really engaging 'Committed Foodies' with their specialist offering and commitment to quality. Aldi and Lidl are getting more than their fair share with foodies and the low price points are not raising quality concerns. The recent acquisition of Whole Foods Market by Amazon has the potential to cause significant disruption. The Whole Foods Market proposition clearly works with foodies and Amazon has the potential to bring their Amazon Prime customers into the mix.

Retailers regular shopping

				 MORRISONS
Committed Foodies	58%	43%	23%	36%
Weekend Foodies	51%	32%	15%	28%
National	49%	31%	10%	24%

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Committed Foodies	31%	23%	10%	8%
Weekend Foodies	29%	25%	5%	3%
National	25%	20%	4%	2%

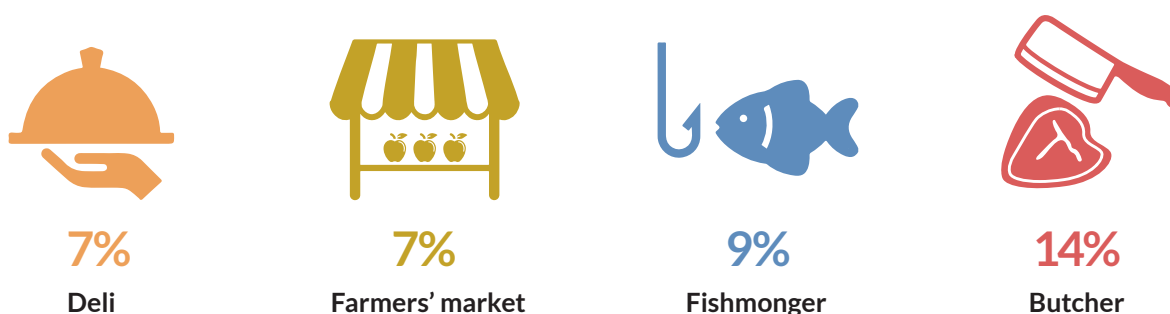
Question: How often to do you shop at the following grocery chains?





Specialist retailers

There has been a rapid growth of butchers, fishmongers and other specialist stores over the last decade and it is now clear that foodies have been instrumental in driving their success. 32% of 'Committed Foodies' are regularly visiting a butcher, double the national average and 24% are visiting a fishmonger regularly, almost triple the national average. Brands with propositions that would work in speciality retailers would be well advised to capitalise on this opportunity to create both brand advocates and sales momentum for wider distribution.

Making a special trip

National



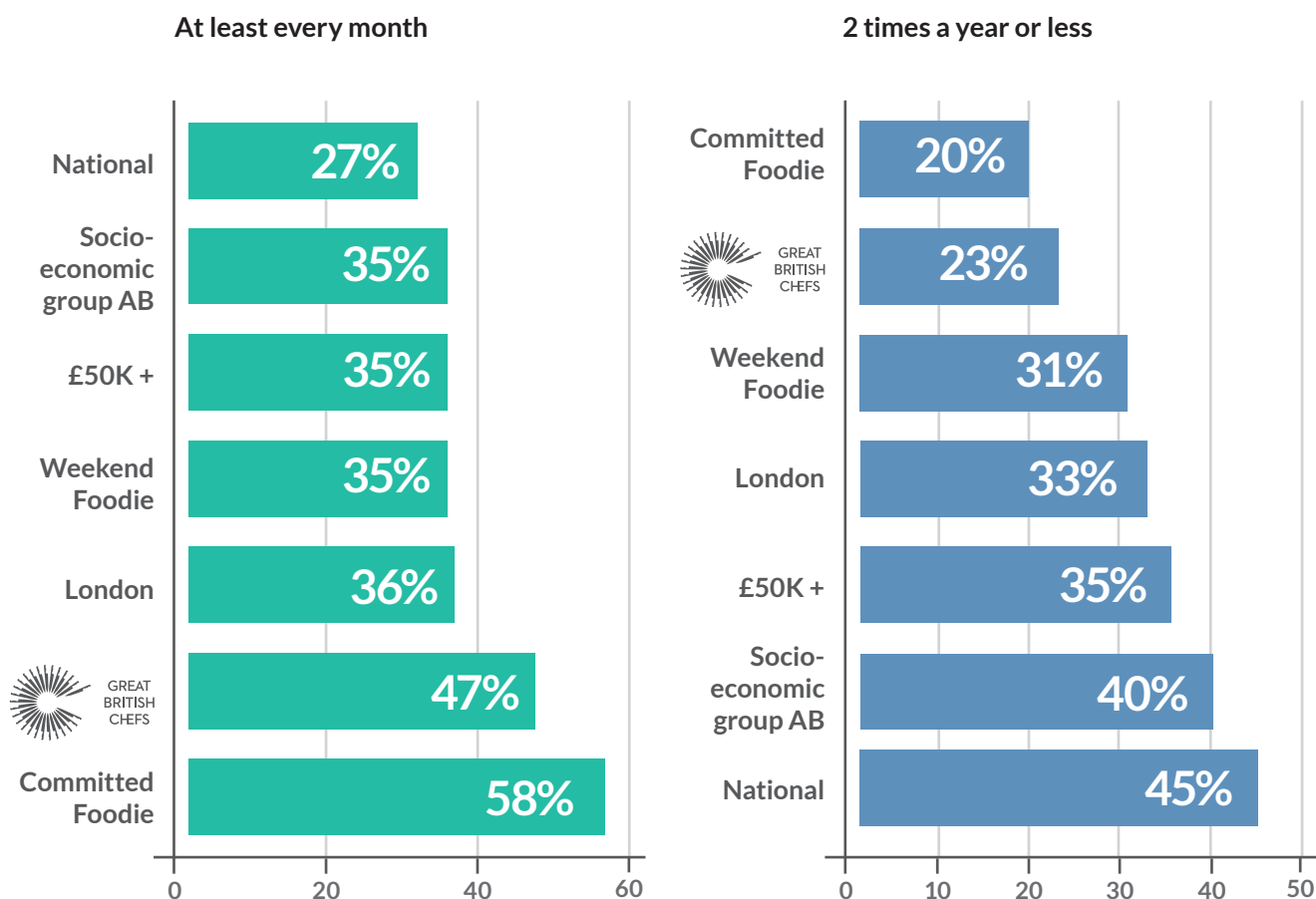
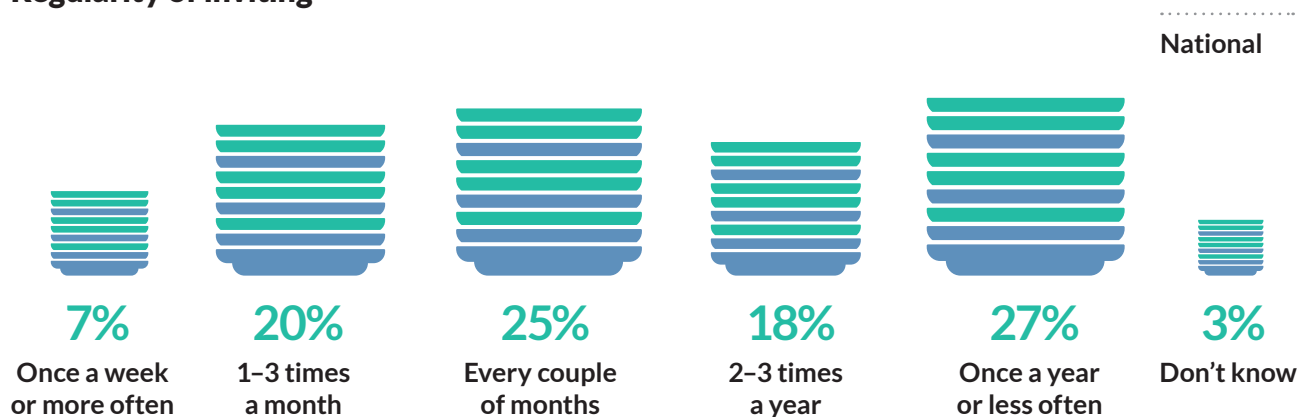
				
	Deli	Farmers' market	Fishmonger	Butcher
Committed Foodies	19%	20%	24%	32%
Weekend Foodies	11%	10%	13%	15%
National	7%	7%	9%	14%

Question: How often do you regularly shop at the following?

Inviting people around

27% of Brits claim to invite their friends and family around for a meal 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, but no one entertains as often as foodies. At the other end of the spectrum, 45% of Brits claim to only invite friends and family round for a meal two to three times a year or less.

Regularity of inviting

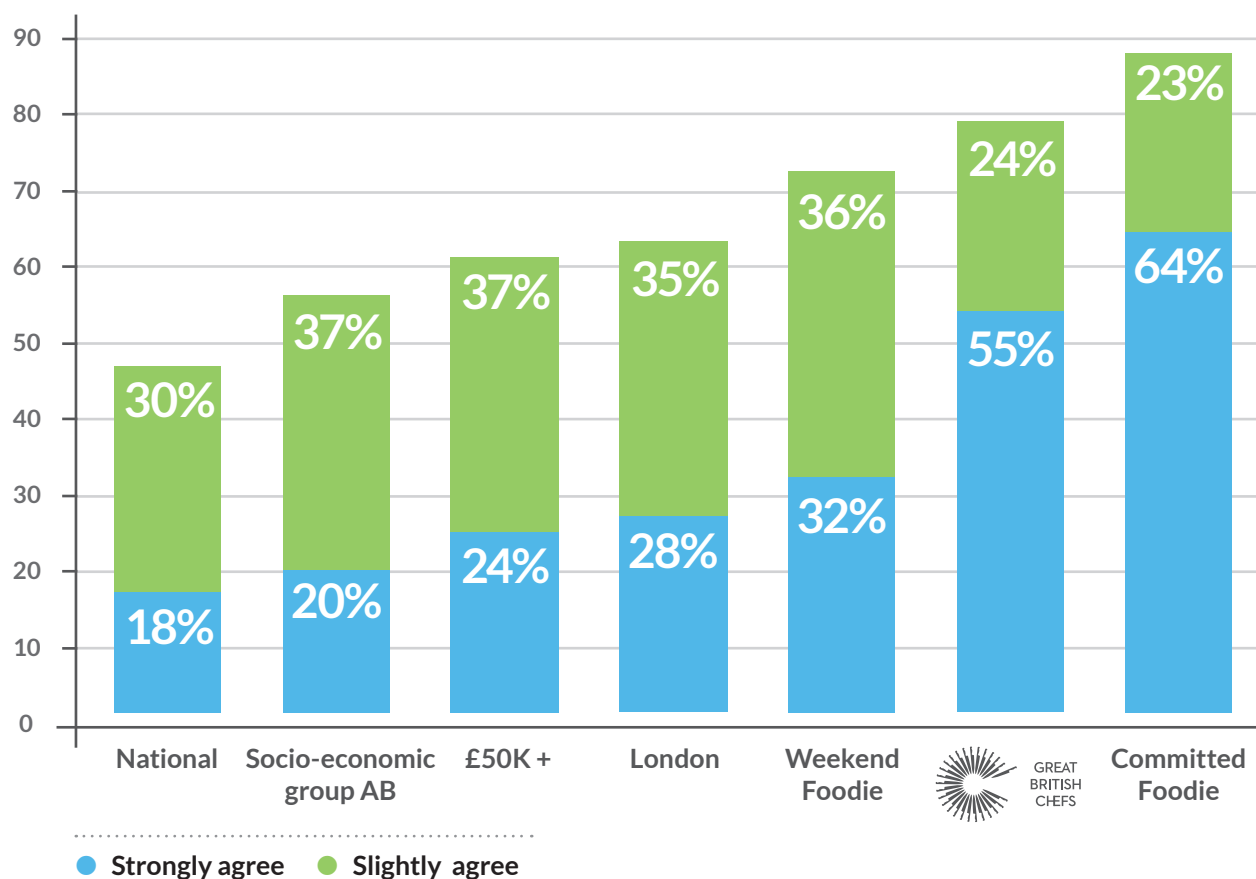
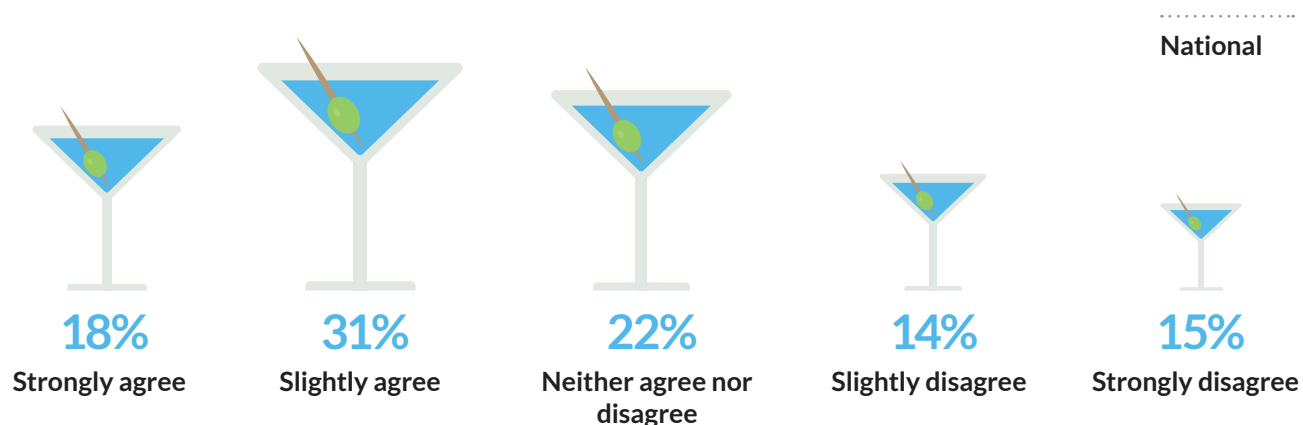


Question: Roughly how often do you invite friends and family to your home for a meal that you cook yourself?

Enjoyment of entertaining

The number of Brits that enjoy entertaining 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. Unsurprisingly, almost 80% of Great British Chefs users claim to enjoy entertaining, with 55% very strongly agreeing with the statement.

Enjoy entertaining friends and family

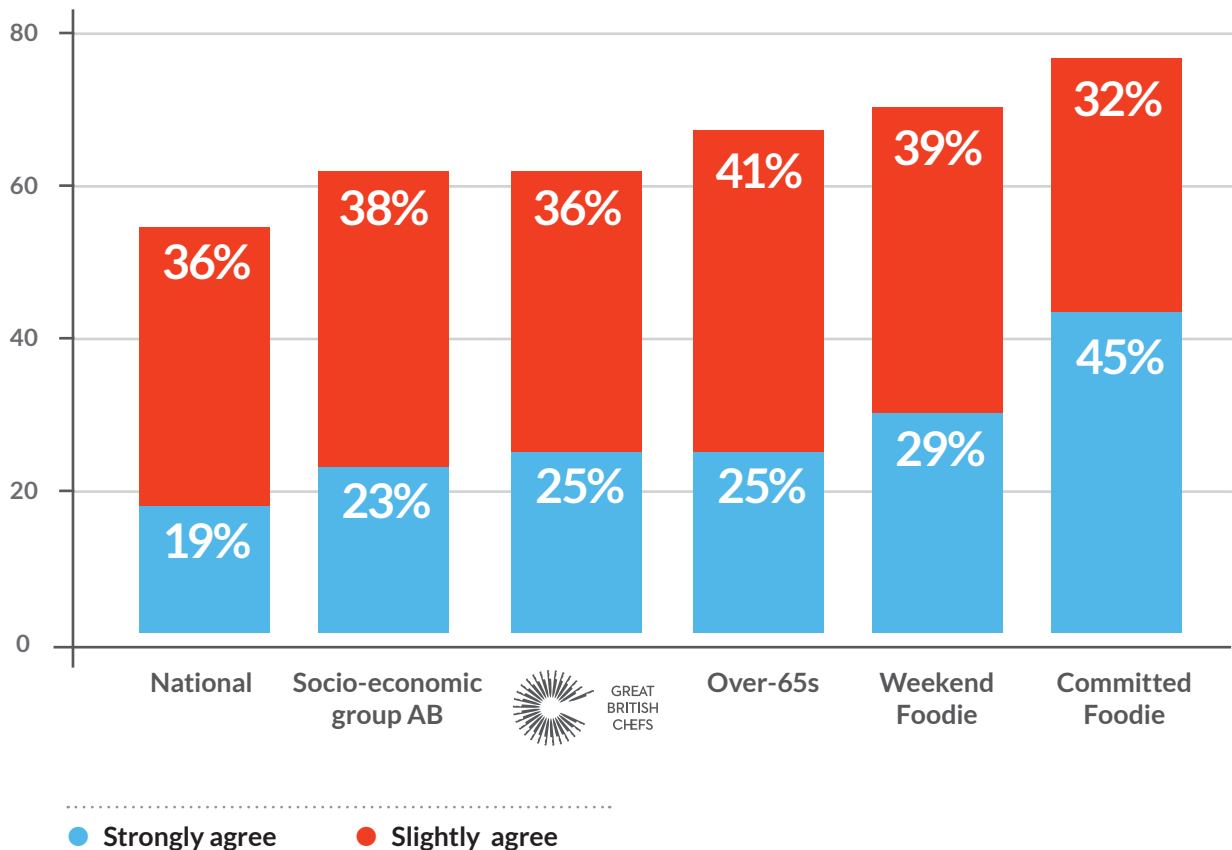
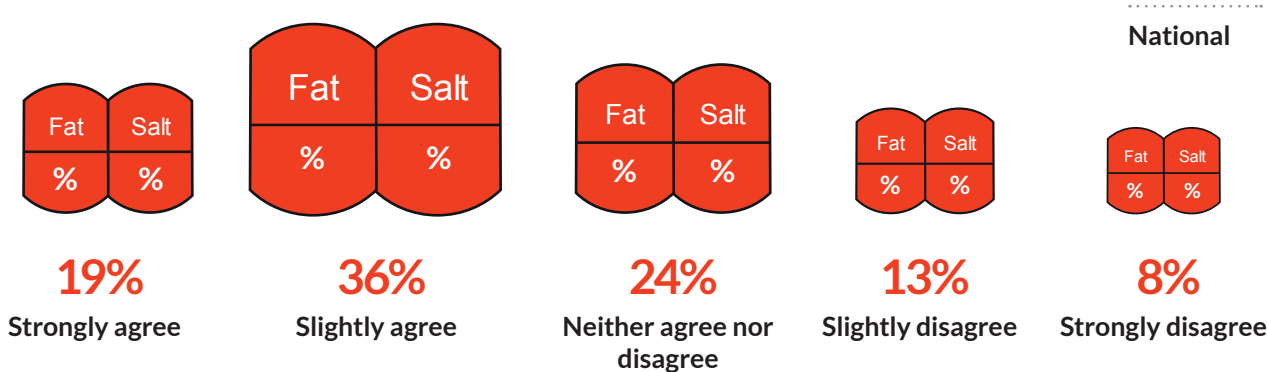


Question: To what extent do you agree with the following statement: I enjoy entertaining friends and family with meals at my home

Food and health

Over 55% of Brits claim to be careful about what they are eating and seek to control their intake of sugar, fat and salt, 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.

Healthy nation







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. It is also worth noting that being a foodie doesn't mean you eat everything, but most Great British Chefs users do.

What is being avoided?

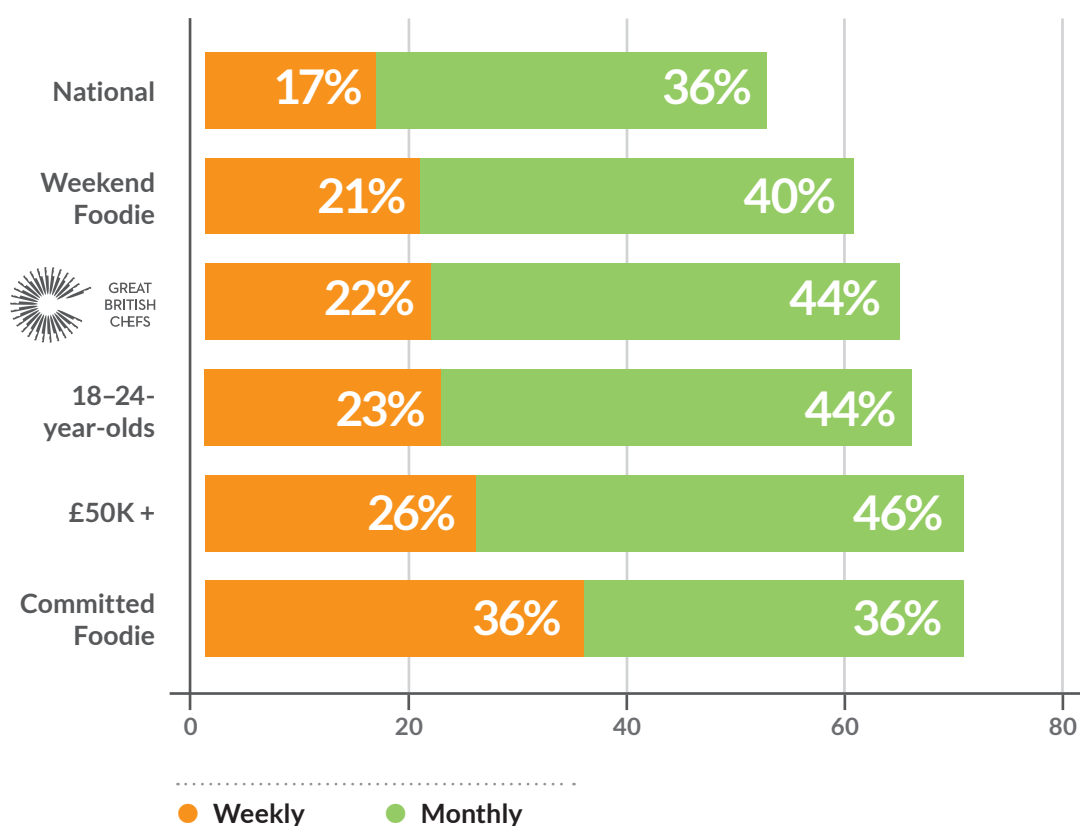
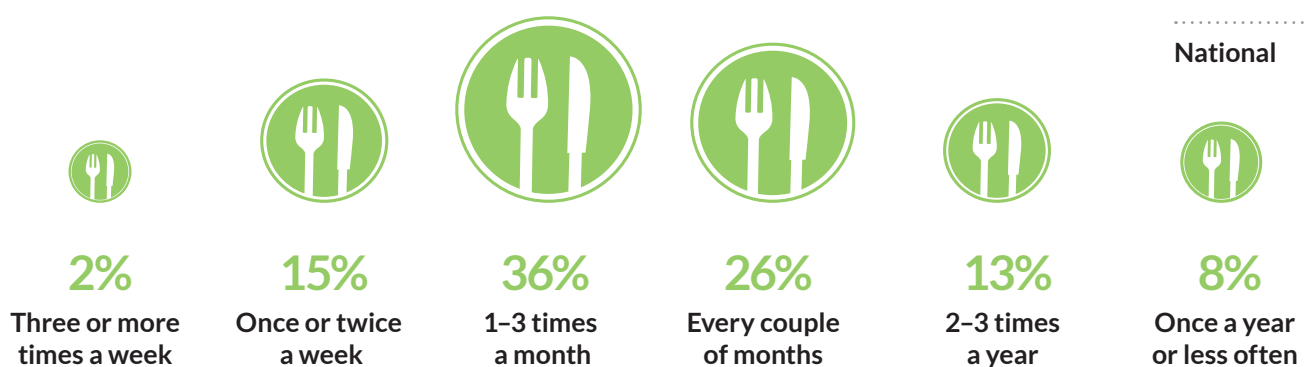
					
	Meat	Fish	Vegan	Gluten or wheat	Dairy products
National	10%	11%	3%	6%	5%
18–24-year-olds	22%	25%	7%	11%	11%
Women	12%	12%	4%	7%	7%
 GREAT BRITISH CHEFS	7%	6%	2%	5%	4%
Weekend Foodie	12%	13%	5%	6%	6%
Committed Foodie	14%	11%	4%	9%	9%

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. Wealthier consumers, foodie segments and those living in London eat out far more frequently (65% every month) than the national average. Excluding 'Committed Foodies' and more wealthy groups, 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

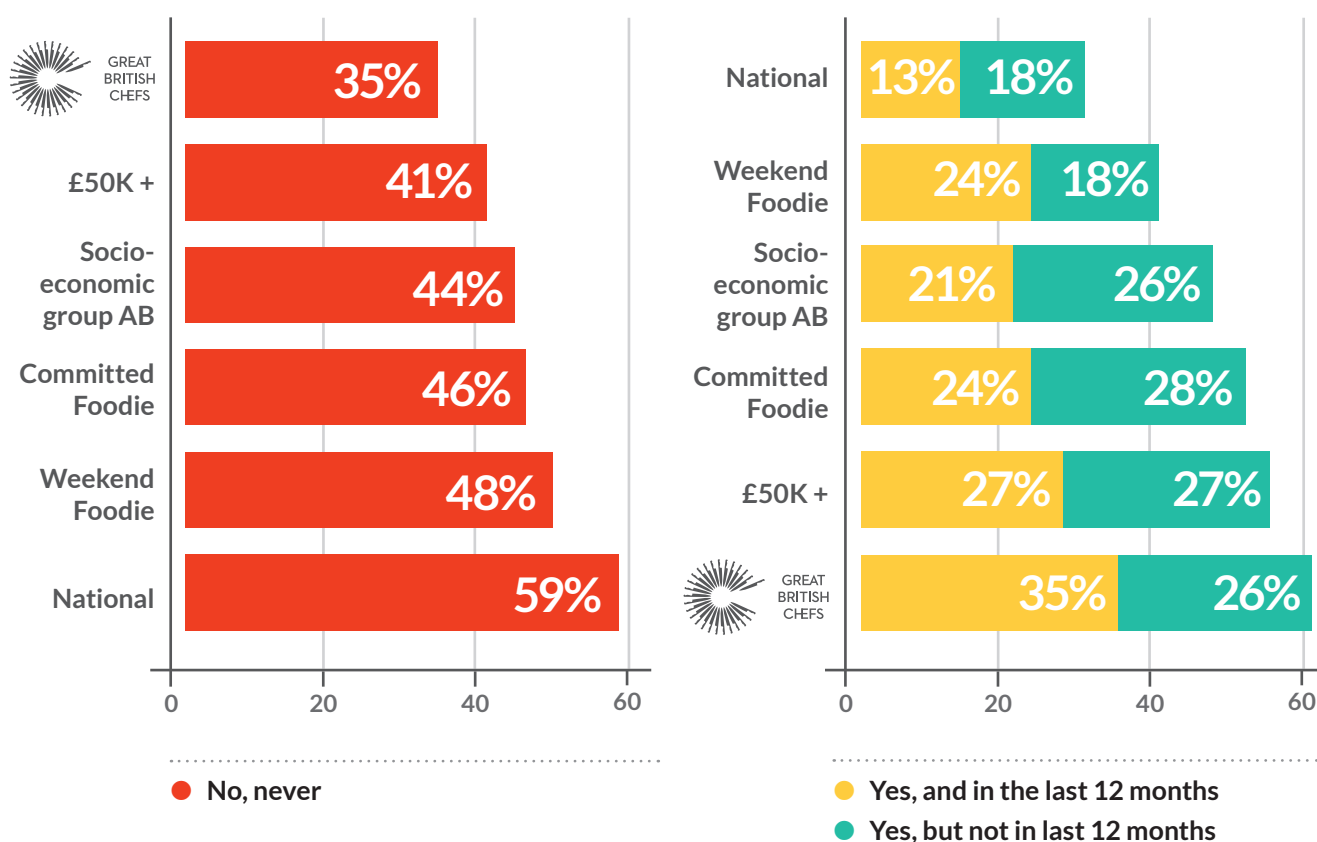
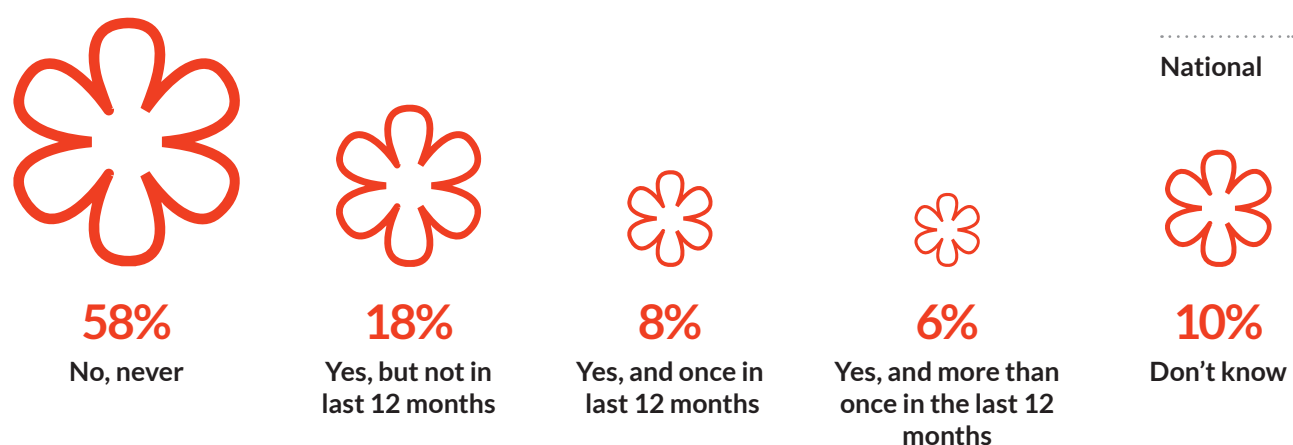


Question: Roughly how often do you eat out at a restaurant or a pub?

Michelin-starred 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-starred restaurants more than women and as expected London, with its 79 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-starred restaurants (35% in the last year) in far greater numbers than the nationally representative, more upmarket groups and even 'Committed Foodies'.

Eating in Michelin-starred restaurants

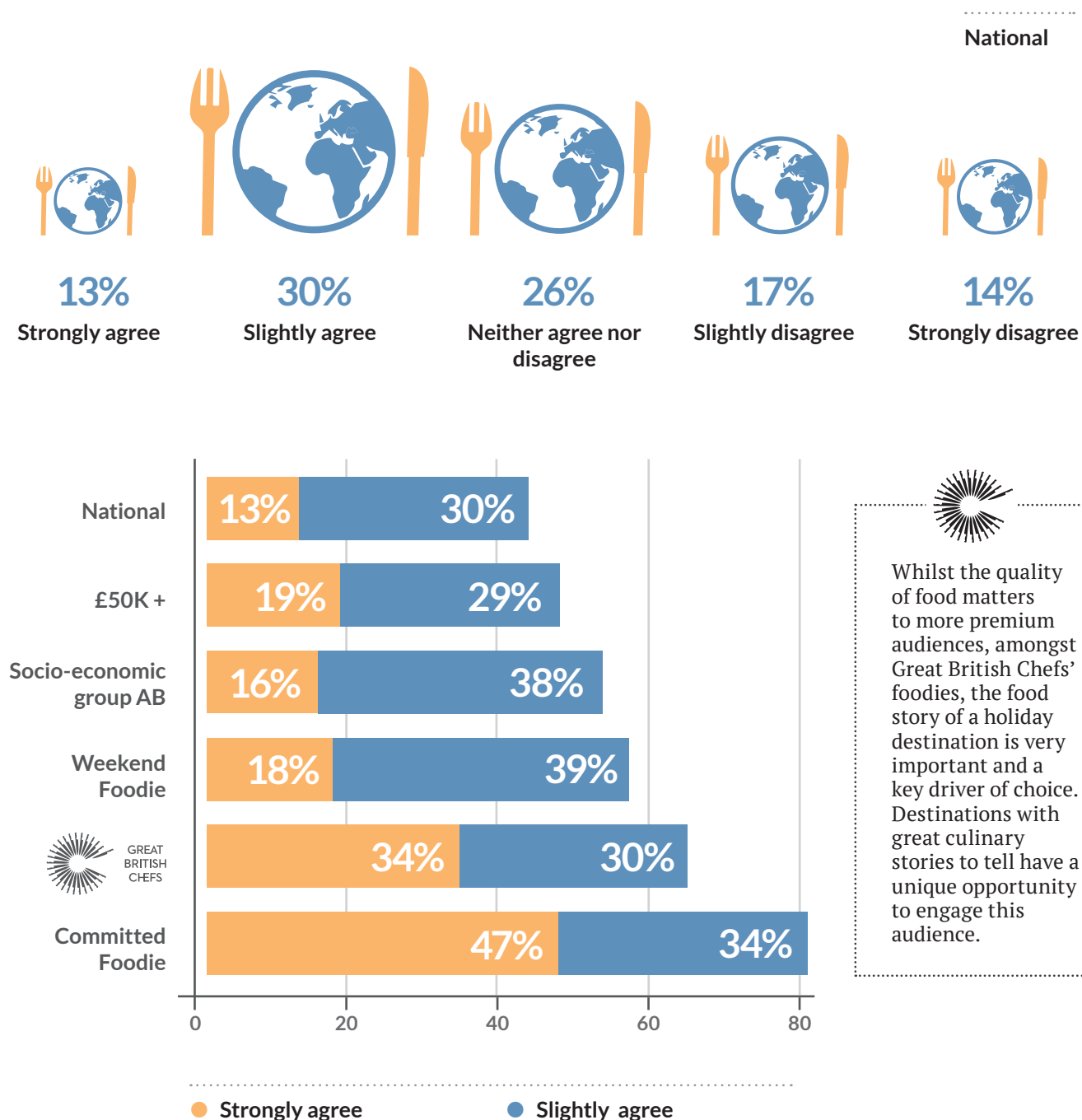


Question: Have you ever eaten in a Michelin star restaurant?

Food and travel

While 42% of Brits think that food is a very important factor in their choice of holiday 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 and this rises to 81% amongst 'Committed Foodies'.

Food a very important factor in destination choice

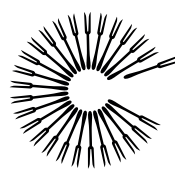


Question: To what extent do you agree with the following statement: when planning my holidays, food is a very important factor in my choice of destination





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FOR MORE INFORMATION, CONTACT

Amanda Burningham:

amanda@greatbritishchefs.com – 020 7837 5925

www.greatbritishchefs.com

www.greatitalianchefs.com