

GREAT
BRITISH
CHEFS

A RICH AND COMPLEX RELATIONSHIP

GREAT BRITISH CHEFS INSIGHT

EXECUTIVE SUMMARY

Historically, our love of food was simple and straightforward. These days, however, it has become much more rich and complex. Gone are the times when we could simply enjoy cooking and eating without worrying about environmental implications and health concerns. Today, people are increasingly questioning the ethics that lie behind food production and how to make the right healthy choices. This is the eighth whitepaper from Great British Chefs which further explores the values, attitudes and habits of the modern-day foodie, as well as the key trends that are impacting Britain's wider culinary landscape.

Since 2017, Great British Chefs has collected over 40,000 completed surveys containing a total of over two million answered questions, giving us an unparalleled understanding of Britain's 13 million foodies. In July 2019, we completed our latest survey with a nationally representative panel of 4,000 people via Dynata and an additional sample of 8,119 Great British Chefs users. (Note that all data quoted in this paper is from July 2019 research unless stated otherwise). The consistency of our approach has allowed us to accurately track key shifts and trends over time, as well as identifying new emerging themes.

Against a backdrop of political and socio-economic uncertainty and division, foodies show no sign of fragmentation. They are, in fact, more committed to their love of food and consequently more influential.

THE THREE SEGMENTS



NON-FOODIE
70% NATIONALLY



**WEEKEND
FOODIE**
13%
NATIONALLY



**COMMITTED
FOODIE**
17%
NATIONALLY

2
STATEMENTS OR LESS

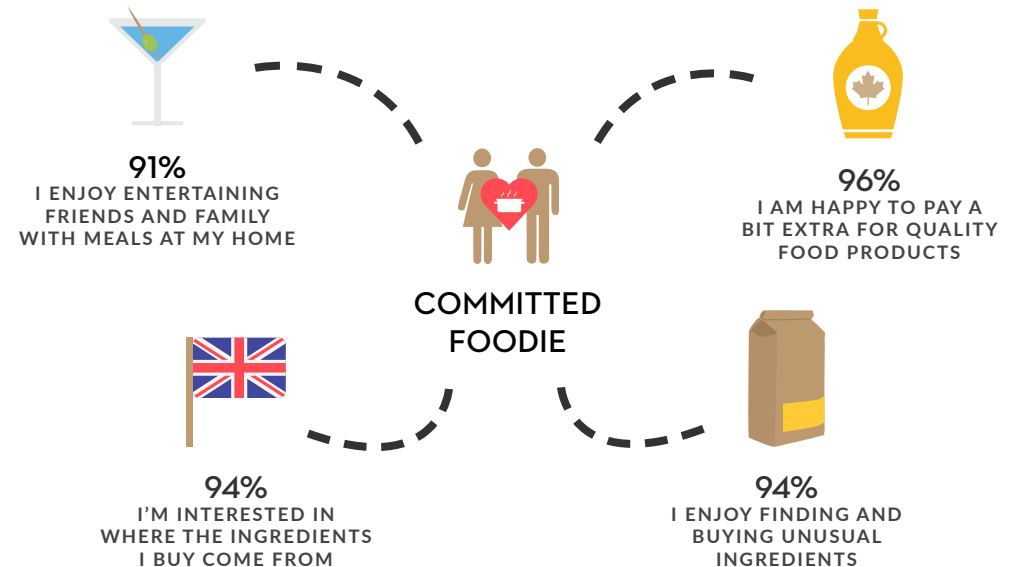
3-4
STATEMENTS

5+
STATEMENTS



GREAT BRITISH CHEFS

Confidence amongst foodies is growing. While we can categorise which people are foodies depending on how they answer our surveys, not all of them self-identify as a 'foodie' when asked. Since 2017, the number of Committed Foodies that self-identify as foodies has grown by 10%, proving that self-awareness and confidence amongst this group is on the rise. They increasingly believe that they are expected to know and explain the latest food trends to their friends (+25%) and enjoy entertaining more than ever (91%).

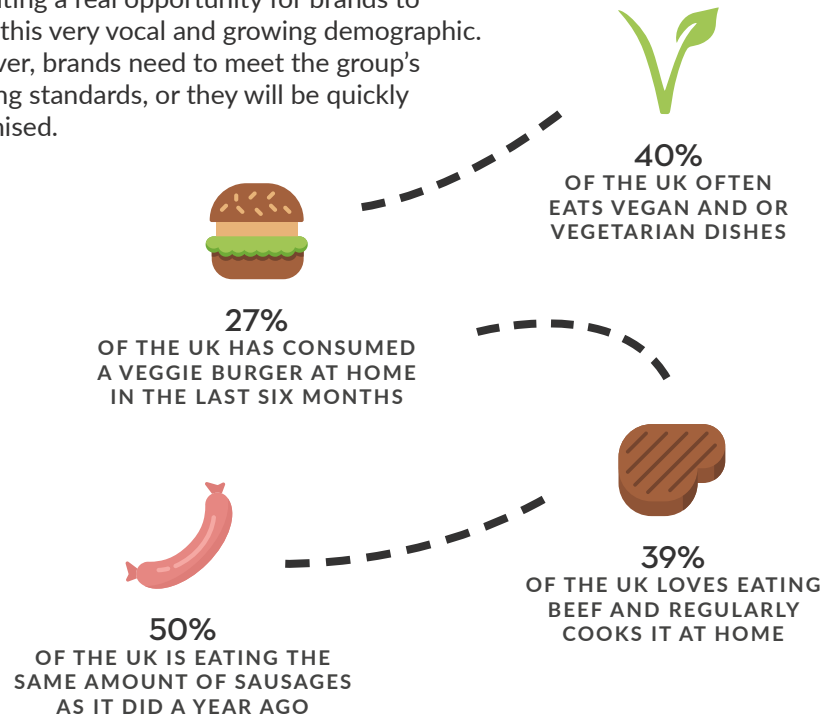


Data is for Committed Foodies and shows the percentage who agree (strongly agree and slightly agree) with the statements listed.

Despite food price inflation running at its highest level for six years (according to the British Retail Consortium), Committed Foodies are prepared to invest in quality more than ever (+7%) and are increasingly interested in provenance and where things come from (+9%). However despite the fact that the UK is consuming more food-focused media than ever before (on TV, online and print), it's interesting to note that Brits have become less confident about their cooking ability. That, in turn, means those who are passionate, confident and knowledgeable about food are consequently becoming even more influential.

EXECUTIVE SUMMARY

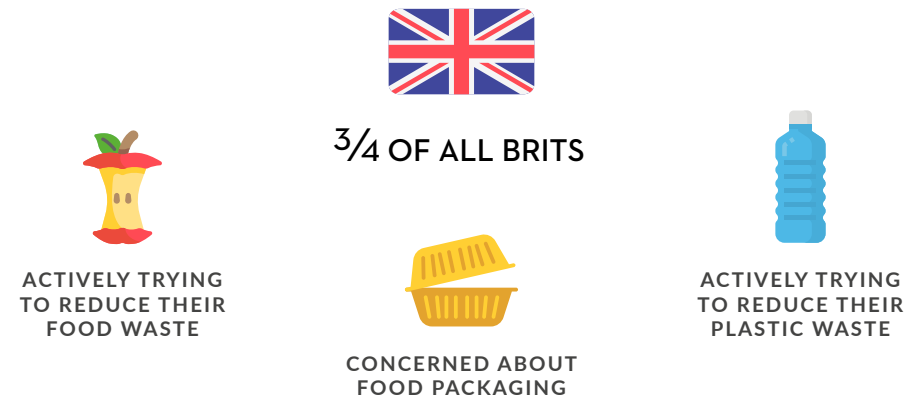
Great British Chefs has been tracking the vegan and vegetarian trends closely over the years, and we can see an increasingly clear picture of where the commercial opportunities lie. 6% of the UK now claims to be either a strict vegan or a strict vegetarian (a significant increase since 2018), presenting a real opportunity for brands to target this very vocal and growing demographic. However, brands need to meet the group's exacting standards, or they will be quickly demonised.



Data is for UK 18-74 year olds and shows the percentage who agree with the statements listed.

Despite the increase in strict vegans and vegetarians, the potentially more interesting commercial opportunity is amongst the majority of Brits who are just beginning to embrace a more balanced plant-based diet, as their habits are still emerging and their standards less exacting. In reality the majority of people haven't really changed how often they eat sausages and bacon, but the increasing noise around healthy eating will impact brands and products far beyond those favoured by strict vegans and strict vegetarians.

There has been much discussion about the impact of Blue Planet II and Sir David Attenborough's role in encouraging people to join the 'war on plastic'. It is now the case that a third of Brits strongly agree that they are trying to reduce their plastic waste, and are also committed to reducing food waste. Whilst we don't see a specific age skew to this trend, it's clear the foodie is at the forefront of driving change. A number of companies, from Waitrose to Tesco, have recently made bold steps to address their environmental impact and it seems that consumers (and the press) are taking note. For change to be seen, it is vital that brands have a coherent story that they can communicate in a compelling way.



Data is for UK 18-74 year olds and shows the percentage who agree with the statements listed.

At Great British Chefs, we pride ourselves on understanding the motivations of Britain's 13 million foodies in order to connect and engage with them. Our audience-first approach allows us to develop the right content and deliver the right messages to ensure we inspire our community and create an impact. If you would like to know more about our research, brand consultancy and the successful partnerships we provide for brands including Tilda, Peter's Yard, Doves Farm, Vitality and Fever-Tree, please do get in touch. In the meantime, we hope you enjoy reading through our **Rich and Complex Relationship** white paper.



AMANDA BURNINGHAM,
CHIEF REVENUE AND MARKETING OFFICER

BRITAIN'S FOODIES

We have segmented the British consumer into three categories depending on how strongly they agreed with 10 food-related statements (see Appendix for further details). 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. Those agreeing with two or fewer statements are classified as a 'Non-Foodie'. Based on this categorisation, there are around 13 million foodies (i.e. the total number of Committed Foodie and Weekend Foodies combined) in the UK, which accounts for 30% of the UK population aged 18-74.

11m
foodies live
outside of
London

ATTITUDINAL DIFFERENCES

I LIKE TO TRY OUT
NEW RECIPES

I ENJOY FINDING AND
BUYING UNUSUAL
INGREDIENTS



COMMITTED
FOODIE



NATIONAL

90%



30%



72%



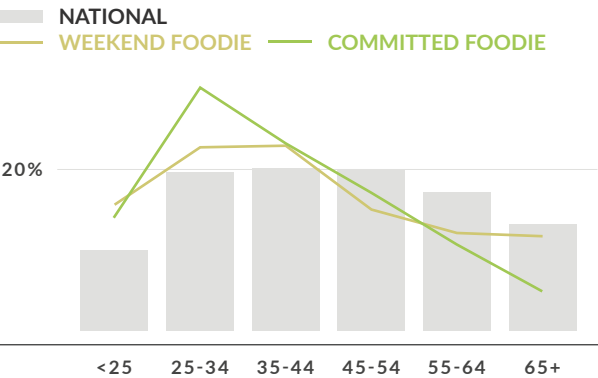
16%



Data is for UK 18-74 year olds / Committed Foodie and the percentage who strongly agree with the above statements

DEMOGRAPHICS

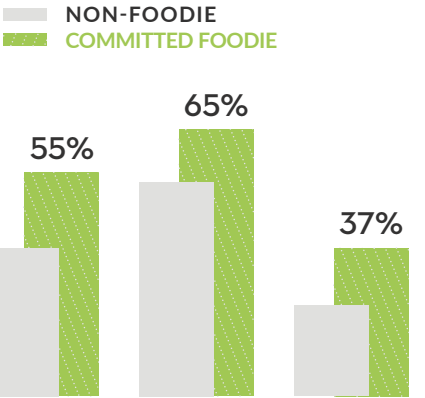
Whilst there is a large concentration of foodies living in London and southern England, the reality is that 65% of all foodies are based outside of this area. In addition, foodies are not defined by their socio-economic status, even if they are slightly above the national average. From an age perspective foodies skew slightly younger, and while 25-34-year-olds account for only 20% of the surveyed population, they represent 30% of the Committed Foodie segment.



Data is for UK 18-74 year olds / Committed Foodie / Weekend Foodie

PURCHASING

When looking at the purchasing behaviour of Committed Foodies, it is clear that they buy branded offerings significantly more regularly than Non-Foodies. However, in most categories, it is still the case that only 50% of foodies buy a branded product, so while they over-index significantly there still remains a large upside for growth within this quality-conscious community.



Question: When thinking about the following categories what do you normally purchase? 'Branded products'. Data is from January 2019 GBC research with Dynata



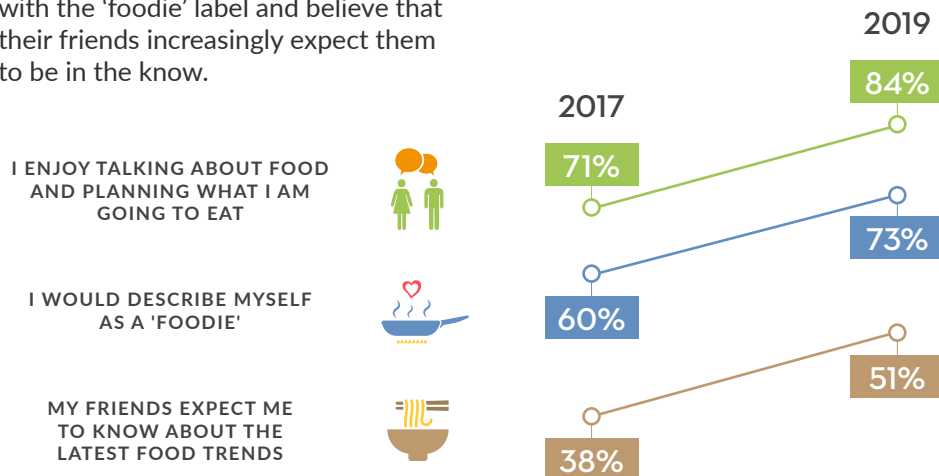
INFLUENTIAL CHANGE AGENTS

Whilst the total number of foodies has remained relatively constant for the last three years at around 13 million, more and more are confidently self-identifying as individuals who have an influence on the UK's food scene. In an evolving culinary landscape where attitudes, values and habits are in flux and people are less confident in their cooking abilities, foodies are playing a key role in driving the conversation and setting the agenda around food.

84%
of Committed Foodies strongly agree that they like talking about food

INCREASINGLY CONFIDENT

In a world dominated by social media and niche communities, people are increasingly defining themselves in relation to their passions and values. Foodies are no different. When we look at some of the key statements that we use to define a foodie, it is clear that the values that sit behind these statements are being held more firmly. They are talking about food more than they did three years ago, feel happier about associating themselves with the 'foodie' label and believe that their friends increasingly expect them to be in the know.

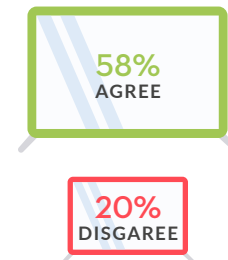


Data is for Committed Foodie and the percentage who strongly agree with the above statements
Data is from the 2017 & 2019 GBC research with Dynata

WATCHING AND SEARCHING

A substantial majority of people in the UK claim to enjoy watching food TV (58% nationally) and a further 21% can't decide how they feel about it. Alongside this, 44% of people cite the internet (online searching via Google, etc.) as the place they go to find recipes and food information. Despite the dominance of social networks and their central role in people's lives, they are more associated with discovery than active search.

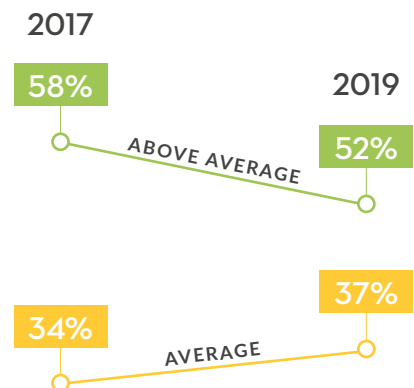
I ENJOY WATCHING FOOD TV PROGRAMMES



Data is for UK 18-74 year olds and the percentage who agree or disagree with the statement:
I enjoy watching food TV programmes

COOKING ABILITY

Despite the fact that the UK is consuming more food-focused media than before, this is not translating into a nation that is increasingly confident at cooking. While the young are more confident of their abilities than older consumers, there has been a marked decline in the number of Brits who consider their skills to be above average ('very good' or 'good'), and an increase in those who think they are 'average'. It is possible that the increasing culinary repertoires they have seen on TV and the diversification in vegetarian and vegan dishes is fuelling this anxiety.



Question: How would you rate your ability as a cook? Data is for UK 18-74 year olds and from the 2017 & 2019 GBC research with Dynata

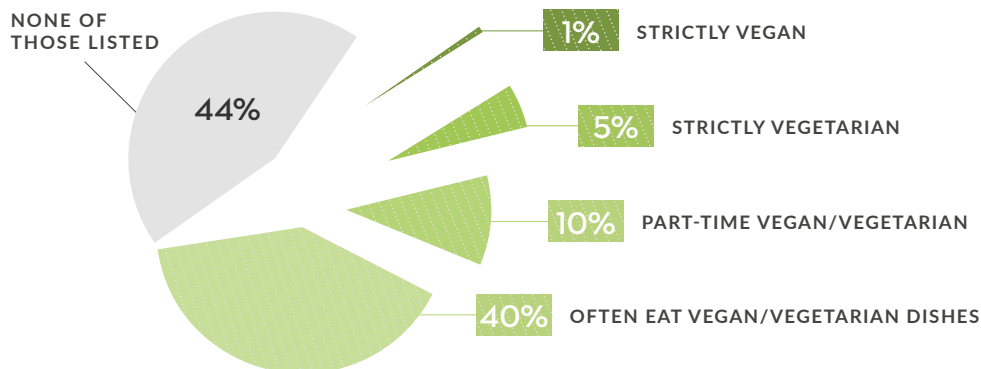
PLANT AND MEAT REVOLUTION

There has been a significant focus over the last few years on the vegan and vegetarian movements. It is now the case that more than half of the UK is engaging with this trend on some level (a group known as flexitarians), mainly by eating vegan or vegetarian dishes more regularly. This is impacting negatively on processed meat products and more positively on other perceived healthy choices such as vegetables and fish.

44%
of the UK
claims to have
eaten more
vegetables in the
last 12 months

DISTINCT CULINARY GROUPS

While 6% of the UK identifies as either strictly vegan or strictly vegetarian, a significantly larger number are engaging with the movement on a part-time basis. With 40% of the population claiming to often eat either vegan or vegetarian dishes, the real volume opportunity lies with this group of people, who are at the start of their journey and don't yet have established habits. However, it is worth remembering that 44% of the UK is not engaging with this trend at all, making this a potentially valuable group to convert from a marketing and NPD perspective.

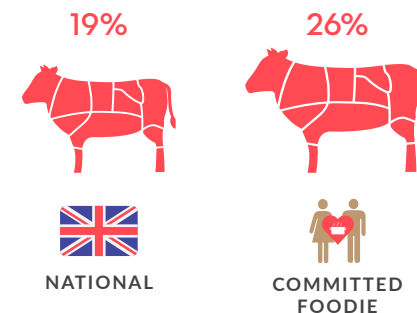


Question: Which of the following statements do you agree with (Agree / Disagree): I am strictly vegan / I am strictly vegetarian / I am a part-time vegan / I am a part-time vegetarian / While I am not a vegetarian, I often eat vegetarian dishes / While I am not a vegan, I often eat vegan dishes

BEEF PERCEPTION

Nowadays, there are more people who believe that beef production is environmentally harmful (19%) than don't (15%), leading to some claiming they are reducing their consumption because of environmental concerns (17%) or for health reasons (19%). However, it shouldn't be forgotten that this is still an emerging trend, as 39% of the UK still claims to enjoy eating beef at home regularly. The challenge for brands in this space is to find a way to engage this community without ignoring the wider trends emerging around beef.

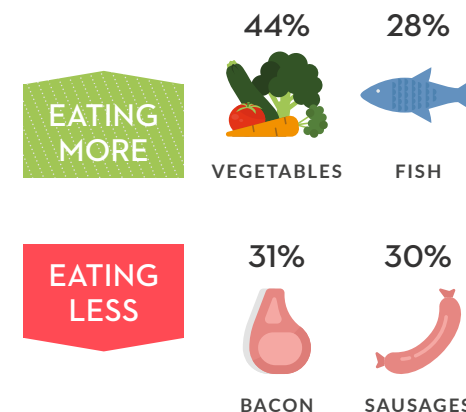
BEEF PRODUCTION IS ENVIRONMENTALLY HARMFUL



Data is for UK 18-74 year olds / Committed foodies who agree with the statements: Beef production is environmentally harmful

THE WINDS OF CHANGE

Considering the vegetarian and vegan trends, it is hardly surprising to see that 44% of Brits claim to be eating more vegetables than they were 12 months ago. Fish is also benefiting from the move towards less meat-centric diets, as are meat-free alternatives like veggie burgers and tofu, particularly amongst foodies. Alongside the already documented impact on beef, it seems that a significant number of people are eating less bacon and sausages, potentially because of all the stories about harmful nitrites in processed food.



Data is for UK 18-74 year olds who agree that they are either eating more or eating less of certain items over the last 12 months

WAR ON WASTE

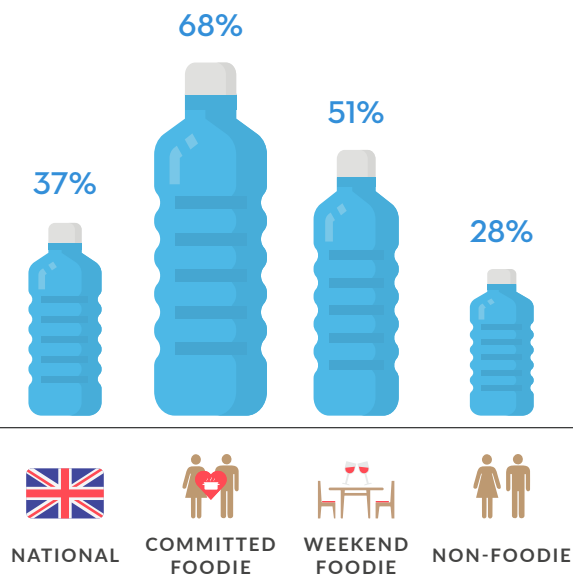
Over the last year, there have been significant changes in the number of people who are focused on reducing their plastic waste whilst continuing to focus on cutting food waste. The waste challenge is being taken seriously by a growing number of Brits, with foodies significantly more committed to changing their habits and actively avoiding products they deem to be wasteful. Brands developing new products need to be mindful of these changing attitudes and more vocal in the efforts they are making to reduce their environmental impact in order to stand out.

77%
of Committed Foodies actively avoid products with excess packaging

PLASTIC WASTE

In the last year, the number of Brits who claim to strongly agree that they are focused on reducing their plastic waste increased from 34% to 37%. The greatest increase is amongst

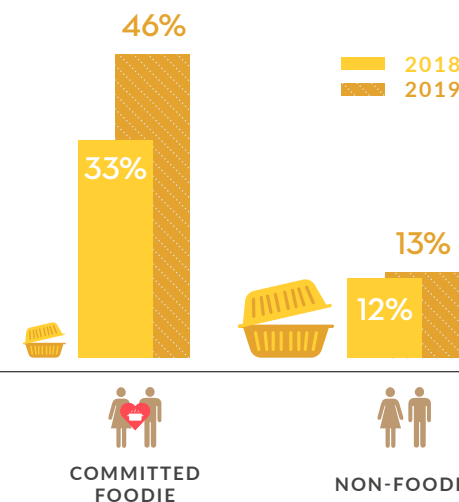
Committed Foodies (not younger audiences, as might be expected). If you look at the number of Brits who agree with this statement (strongly and slightly) the number increases even further (National: 74%; Committed Foodies 91%), implying that the 'Blue Planet' message has had a lasting impact.



Data is for UK 18-74-year-olds / specific segments who strongly agree that they are actively trying to reduce their plastic waste

EXCESS PACKAGING

While it is hard to know exactly what 'excess packaging' means to consumers, it is clear that foodies in particular are avoiding products they perceive to be wasteful. It is now the case that almost 50% of Committed Foodies strongly agree that they are avoiding products with excess packaging and only 7% of them disagree with this statement.

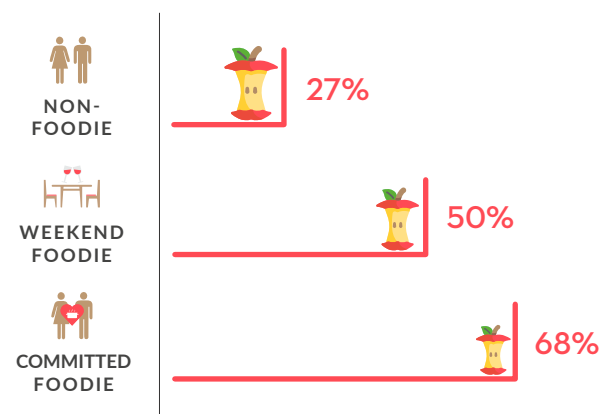


Data is for UK specific segments who strongly agree that they are actively avoiding products with excess packaging. Data is from the 2018 & 2019 GBC research with Dynata

FOOD WASTE

Interestingly, the number of people trying to reduce food waste is very similar to the number of people trying to reduce their plastic waste. However, the numbers have remained relatively steady over the last year, probably because plastic waste

has remained a consistently hot topic throughout the past 12 months. Foodies remain the most focused on their food waste and, considering their culinary talents, are increasingly interested in finding creative ways to cook with what others perceive to be waste products or off-cuts.



Data is for specific segments who strongly agree that they are actively trying to reduce their food waste



PRICE AND QUALITY

Over the last three years the UK has been hit with a number of food scandals, and we've seen widespread debate about issues around food imports (such as chlorinated chicken from the US). It is clear from the recent research that Brits are increasingly seeking out quality products, even if they cost a bit extra. Foodies significantly over-index on buying into new product innovations and the specific NPD launches we have seen in the market; a fact that reinforces their openness to adopting new trends and trying ingredients.

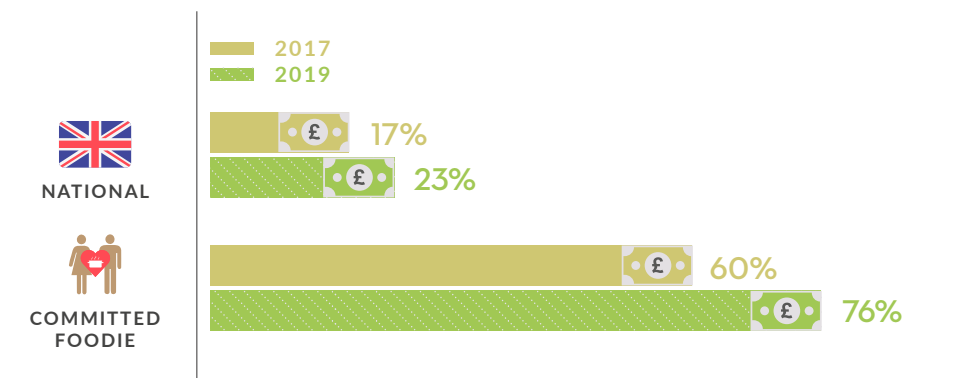
76%
of Committed Foodies strongly agree that they are prepared to pay extra for quality

CHOOSING QUALITY

Over the last two years, the number of Committed Foodies that strongly agree they are prepared to pay a bit extra for quality has increased from 60% in 2017 to 76% in 2019. The reality is that those who do not care about food are not prepared to pay extra, even if it is of higher quality.



I AM HAPPY TO PAY A BIT EXTRA FOR QUALITY FOOD PRODUCTS



Data is for UK 18-74 year olds / specific segments who strongly agree that they are 'happy to pay a bit extra for quality food products'

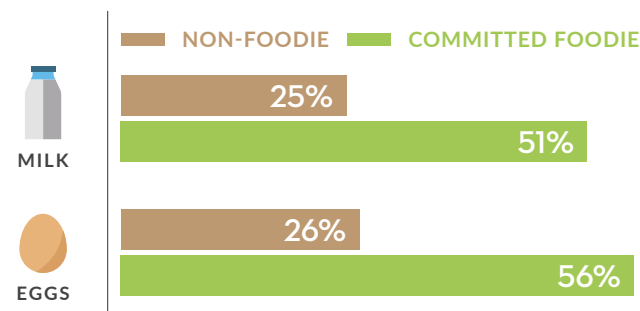


GREAT BRITISH CHEFS

PRICE, QUALITY AND ORGANIC

While only 23% of all Brits claim to be prepared to pay for quality, it is clear that in certain categories more people are choosing to invest in organic, often a byword for quality. However, it is interesting that less Committed Foodies buy organic eggs, milk and vegetables regularly than claim to pay a bit extra for quality products.

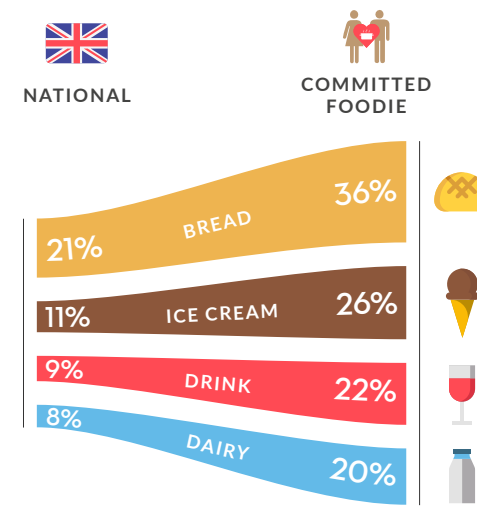
This implies that they are unconvinced of the value or quality that organic products offer, probably opting for free-range and other alternatives instead.



Data is for UK 18-74 year olds / specific segments who regularly claim to have purchased organic products in the last six months

INSPIRING INNOVATION

In our research, we shared a list of 12 new food and drinks products/brands that have been launched in the UK in the last year. Despite the fact that the products spanned categories as diverse as ice cream, bread, drinks, cheese, coffee and dairy, an underlying trend emerged. Committed Foodies are the community that is most interested in buying new products, purchasing them at far higher rates than any other segment of the UK (often more than twice as likely), making them a highly valuable audience to target with NPD innovation.



Data is for UK 18-74 year olds / Committed Foodie who claim to have purchased specific product innovations in the last six months?

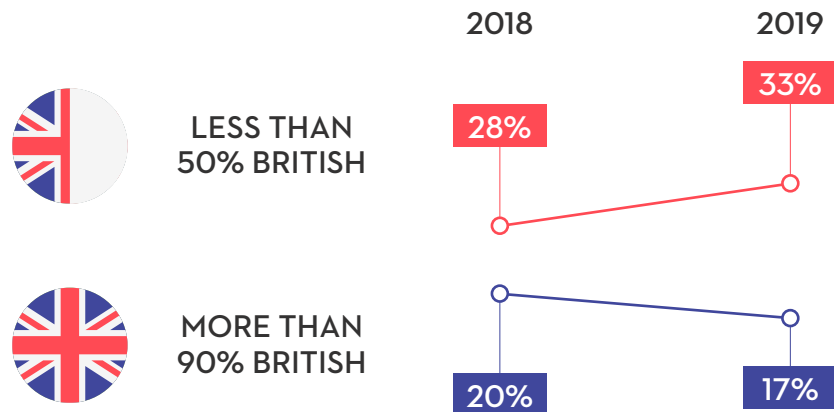
TRENDS VERSUS REALITY

The number of Brits embracing a wide variety of international cuisines is increasing, while the number of Brits who are myopically focused on British cuisine is declining. As would be expected, the dishes that foodies cook at home are becoming more global and more plant-based. However, it is interesting to note that there is a significant difference between what people watch on TV and what they do in their own homes, as witnessed by the relatively small number of people who are baking regularly.

63%
of Brits
haven't baked a
cake in the last
12 months

BEYOND BRITISH

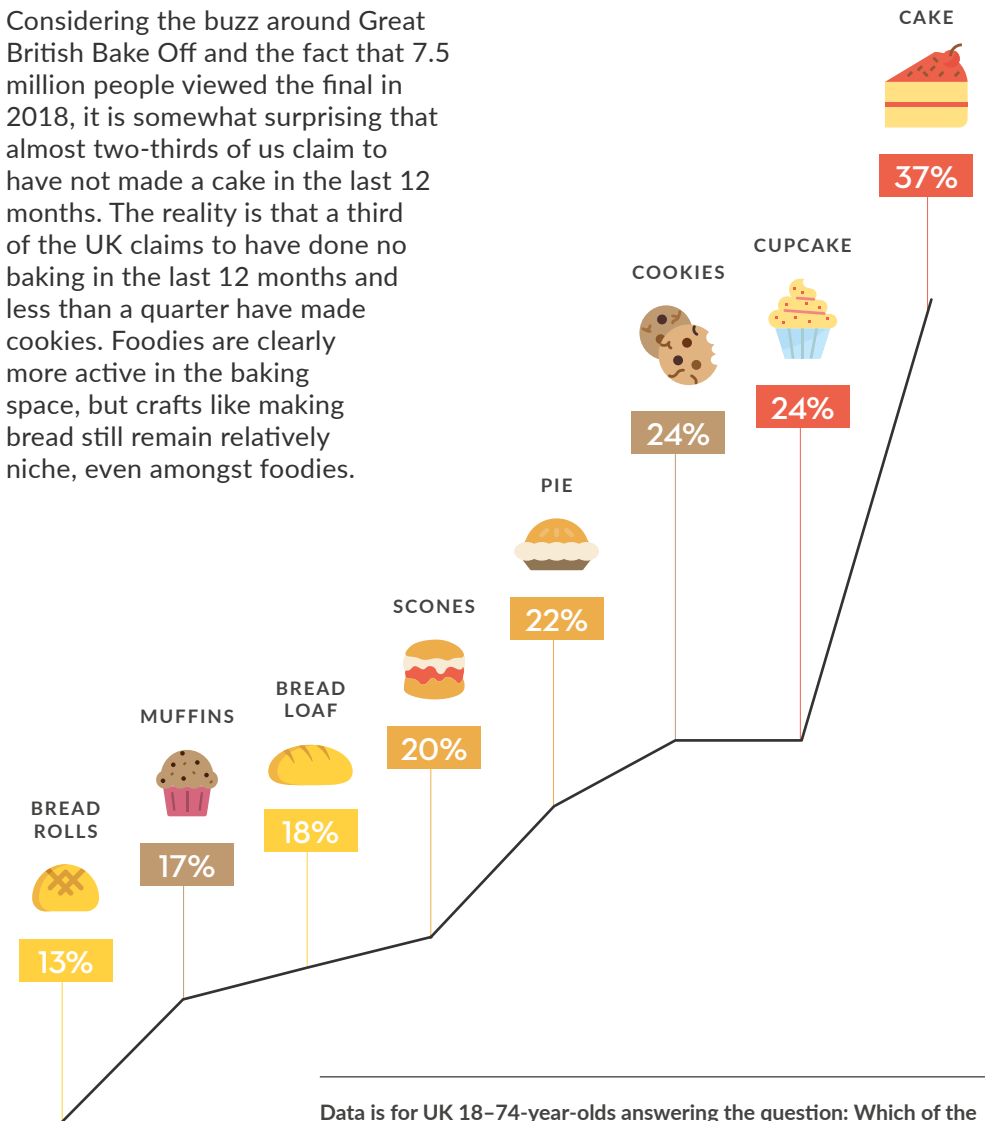
Over the last 18 months, the dishes cooked at home by Brits have become more international. Less than one in five Brits now claim that over 90% of their food is 'British'. Conversely, one in three Brits claim that less than 50% of their food is 'British'. Interestingly, this trend is across the board and not one driven by foodies. As a nation that has embraced everything from pizza and paella to tacos and curry, we have a truly international culinary outlook – even if not all these dishes are being cooked from scratch.



Data is for UK 18–74-year-olds answering the question: How much of your home-cooked food would you describe as 'British'? Data is from the 2018 & 2019 GBC research with Dynata

HOME BAKING

Considering the buzz around Great British Bake Off and the fact that 7.5 million people viewed the final in 2018, it is somewhat surprising that almost two-thirds of us claim to have not made a cake in the last 12 months. The reality is that a third of the UK claims to have done no baking in the last 12 months and less than a quarter have made cookies. Foodies are clearly more active in the baking space, but crafts like making bread still remain relatively niche, even amongst foodies.



Data is for UK 18–74-year-olds answering the question: Which of the following have you baked at home in the last 12 months?

APPENDIX: SEGMENTATION

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.

FOOD-RELATED 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

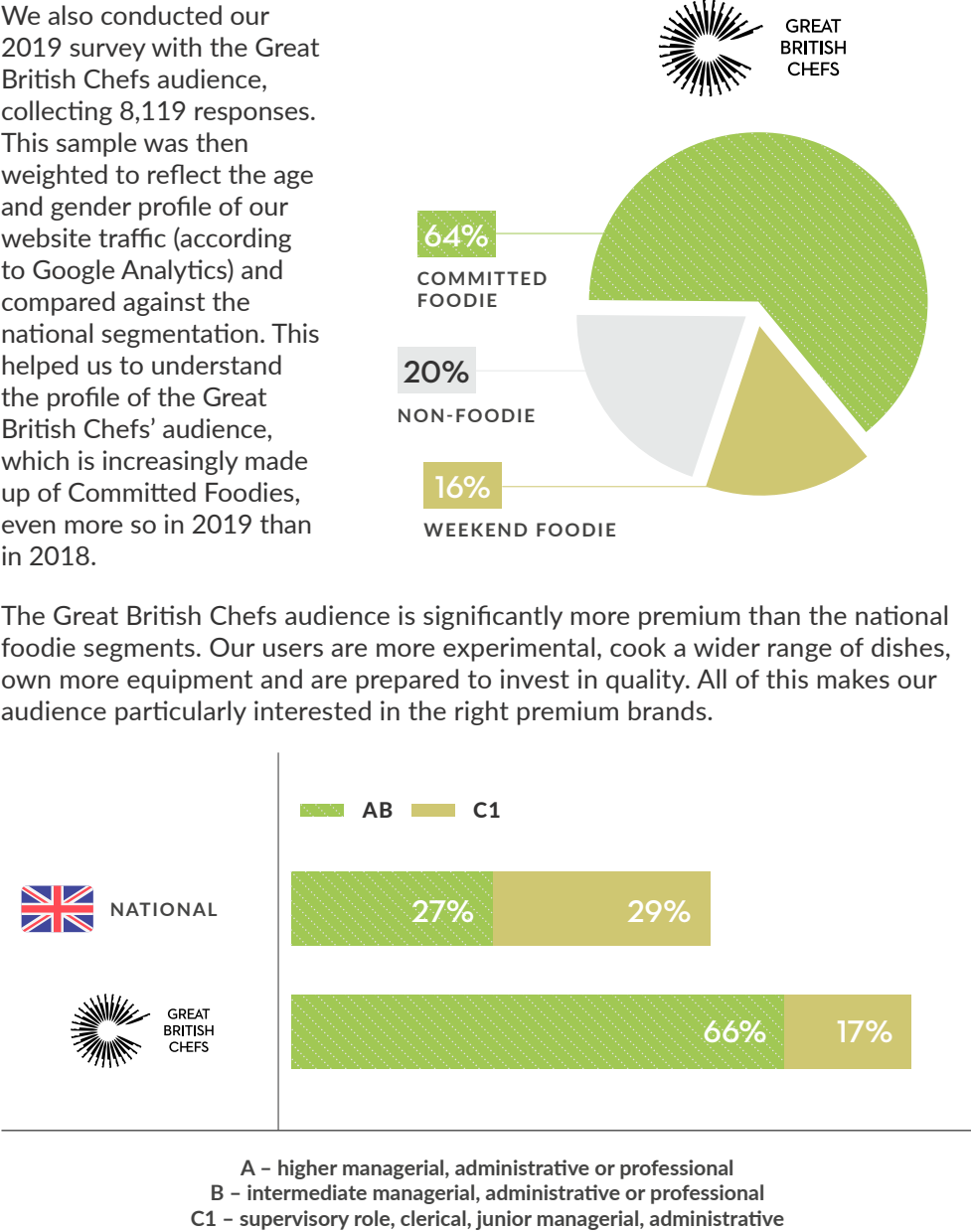


I ENJOY TRYING GOURMET FOOD IN EXPENSIVE RESTAURANTS

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 is 13 million; a minor change and in line with expected margins of error, versus 13.6 million in 2018.

We also conducted our 2019 survey with the Great British Chefs audience, collecting 8,119 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 the Great British Chefs' audience, which is increasingly made up of Committed Foodies, even more so in 2019 than in 2018.

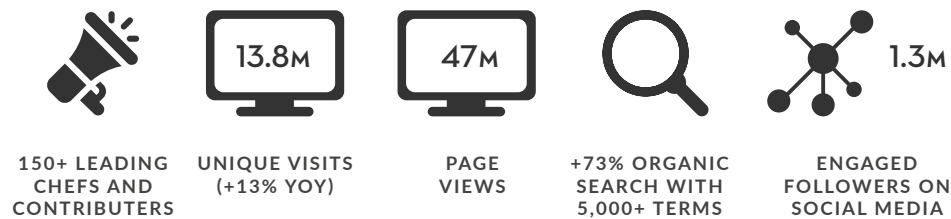
The Great British Chefs audience is significantly more premium than the national foodie segments. Our users are more experimental, cook a wider range of dishes, own more equipment and are prepared to invest in quality. All of this makes our audience particularly interested in the right premium brands.



APPENDIX: GREAT BRITISH CHEFS

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 about Britain's foodies or the ability to reach and engage the most valuable of these consumers.

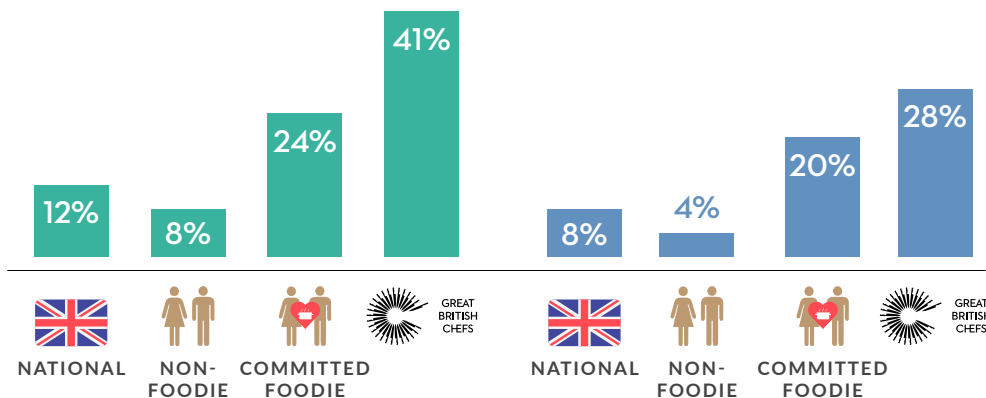
REACH FOODIES AT SCALE



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.

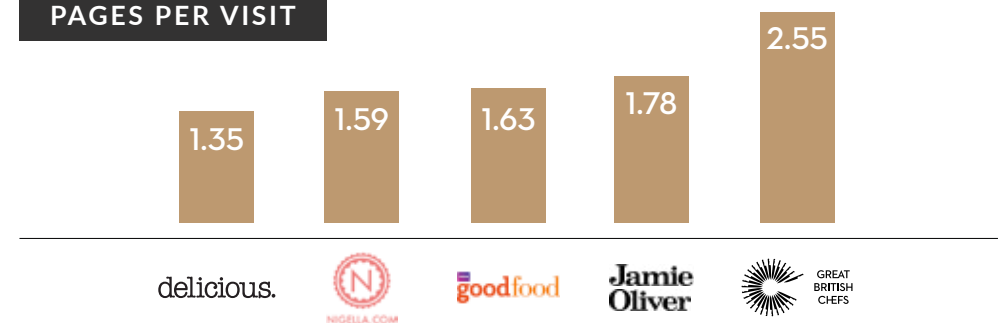
CLIENT A FOR 6 YEARS

CLIENT B FOR 8 YEARS



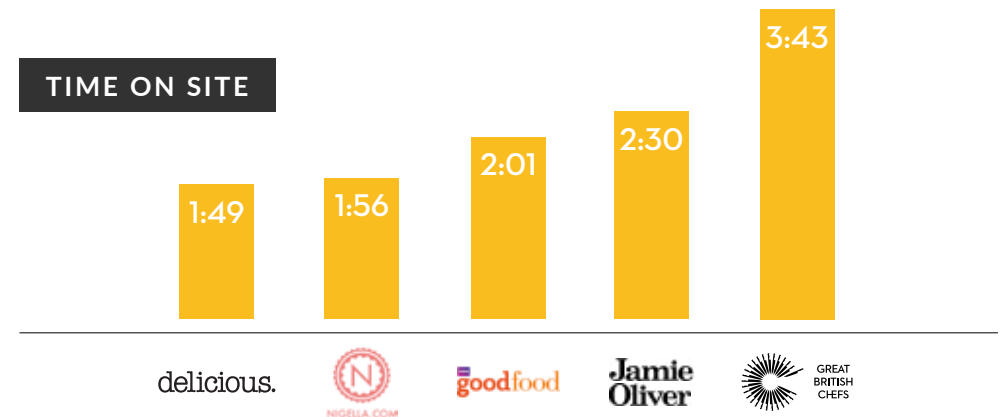
Great British Chefs is a true digital brand, and we invest our time and resources in delivering the right content on the right platform to our rapidly growing community of foodies. In 2018, we received over 20 million visits to our site from 12 million unique visitors, an increase of over 11% versus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

PAGES PER VISIT



Source: SimilarWeb

TIME ON SITE



Source: SimilarWeb

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