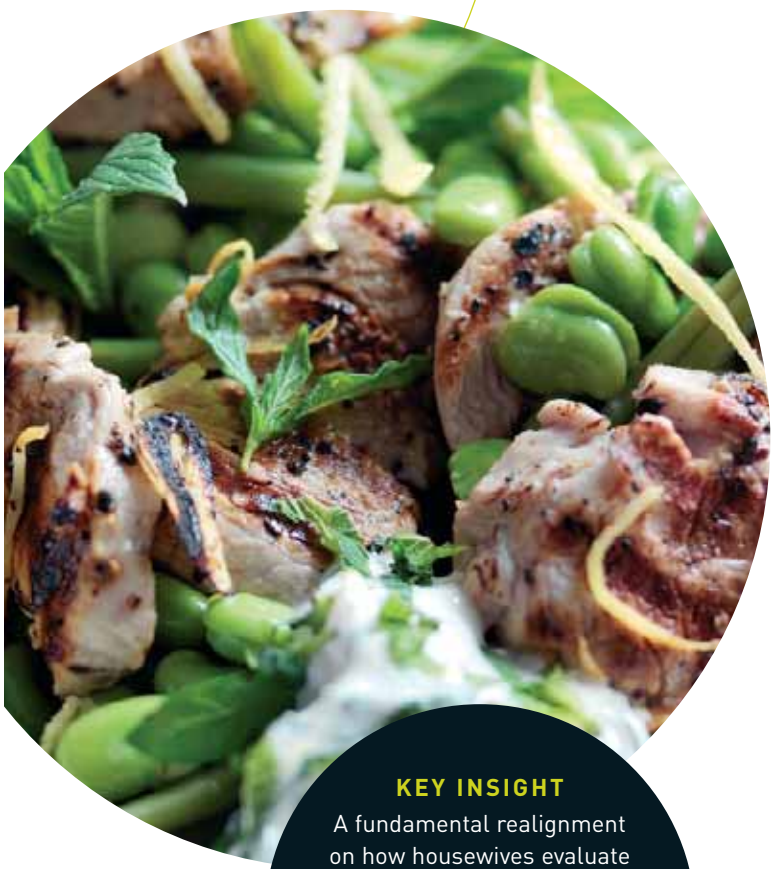


Health at the heart of the matter

While the main drivers of consumer choice have long been recognised as Convenience, Enjoyment and Health, latest figures show that Health is increasingly the motivating factor in our choice of meal.



An 18 per cent increase (over the past three years) in Health given as the main reason for choosing the meal (chart 1) corresponds with consumers becoming more aware of health and pursuing a healthier lifestyle (chart 2).

That equates to nearly 1 million more adults each year saying they consciously try to eat healthy foods (chart 3).

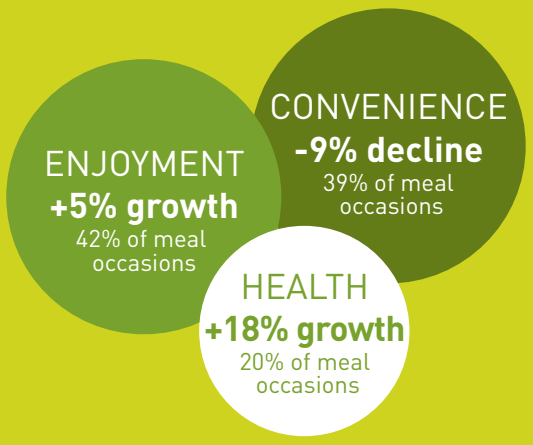
There's even evidence of a backlash against snacking. The growth in snacking that was such a feature of the 80s and 90s has seen a sharp reversal in recent years - a significant fall of four per cent in the past three years alone.

That's had a tremendous impact in mothers' attitudes to feeding their children (see pages 6-7).

KEY INSIGHT

A fundamental realignment on how housewives evaluate food is happening. They are moving away from a high fat, unhealthy/low fat, healthy axis to one of - in their own words - "proper food versus rubbish food."

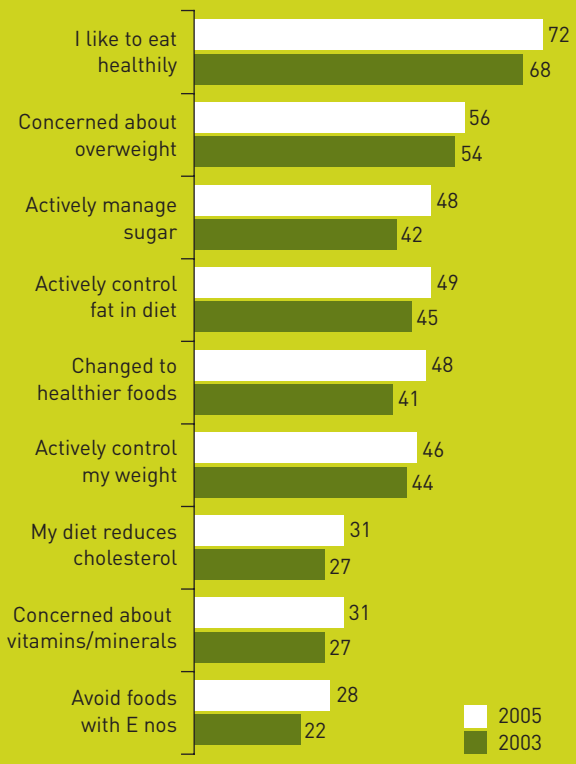
Chart 1
Key Consumption Drivers - In Home



% Individual Meal Occasions
Annual to November 2005 v 2002

Health is playing an increasingly important part in our choice of meals.

Chart 2
Health and Lifestyle



% of individuals agreeing to statement

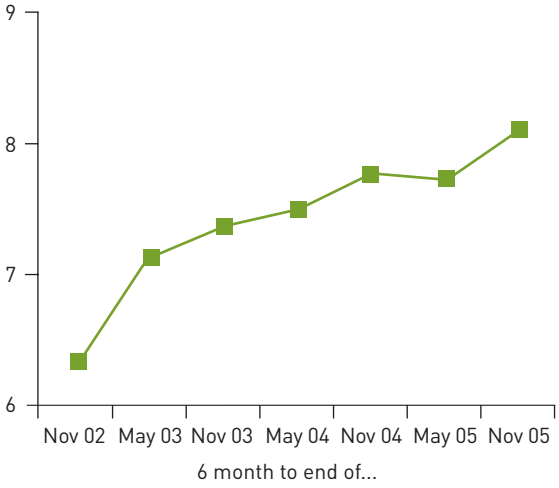
Every indication is that consumers are becoming more aware of health and a healthier lifestyle.



'The new attitude to food is resulting in more traditional family meals - lots of meat, more potatoes and vegetables; beans and chips simply don't fit anymore.'

Source: Focus group research among BC1 mothers aged 25-45

Chart 3
Health, an increasing reason for choice at meals



Millions of adults

Nearly one million MORE adults EACH year say they try to eat healthy foods.

What's In....

Fresh meat
Wet/smoked fish
Fresh burgers
Vegetables
Herbs and Spices

What's out

Frozen ready meals
Frozen burgers
Crisps
Fizzy soft drinks

We're enjoying cooking - again!

For more years than we care to remember, the average time British housewives spent preparing and cooking meals has been diminishing. Much was sacrificed in the pursuit of convenience due to our perceived lack of time.



The latest research suggests that we've turned that particular corner and we're now seeing the beginnings of an increase in the time we're prepared to devote to preparing our meals (chart 4).

At the same time there's been a real renewed interest in cooking - a trend especially apparent among younger housewives where there has been a staggering 75 per cent increase in 17-to-24 year olds professing to enjoy cooking (chart 5).

This trend is further emphasised by the increases in the use of key cooking components such as vegetables, dried pasta, rice and herbs and spices (chart 6).

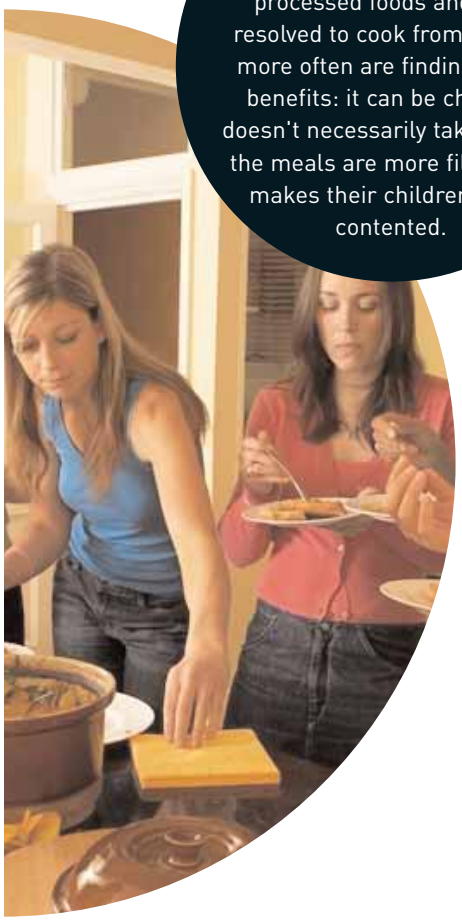


'Years ago we resented cooking - but we didn't realise the consequences. Now it's nice to feel you're healthy.'

Source: Focus group research among BC1 mothers aged 25-45

KEY INSIGHT

Housewives who admit to having had a wake-up call over processed foods and have resolved to cook from scratch more often are finding added benefits: it can be cheaper, doesn't necessarily take longer, the meals are more filling and makes their children more contented.



'We went for convenience and microwaves - as a generation we lost it.'

Source: Focus group research among BC1 mothers aged 25-45

Chart 4

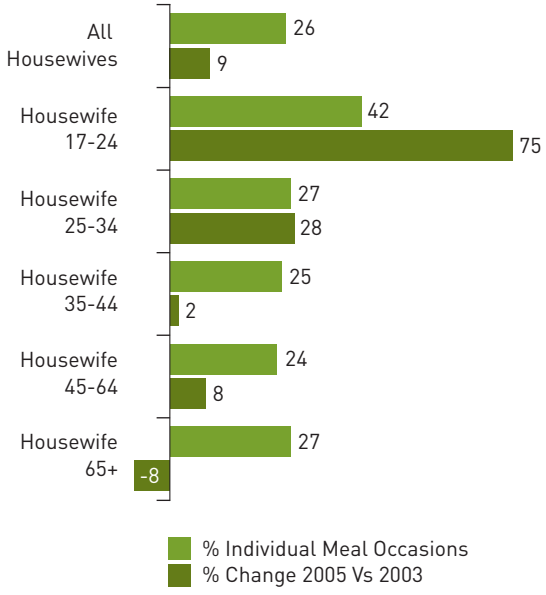
Average preparation times (minutes)

	Total Meals	Evening Meal	Homemade Savoury Food at Evening Meal
2002	18.1	33.0	42.9
2003	19.7	36.3	46.5
2004	19.4	35.5	45.2
2005	19.8	36.1	45.6

The beginnings of an increase in average meal preparation times can be seen.

Chart 5

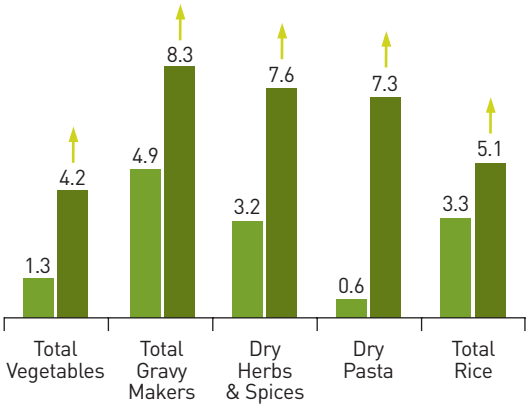
Young housewives increasingly agree they enjoy cooking



More housewives - especially the younger age groups - say they enjoy cooking.

Chart 6

Cooking component categories



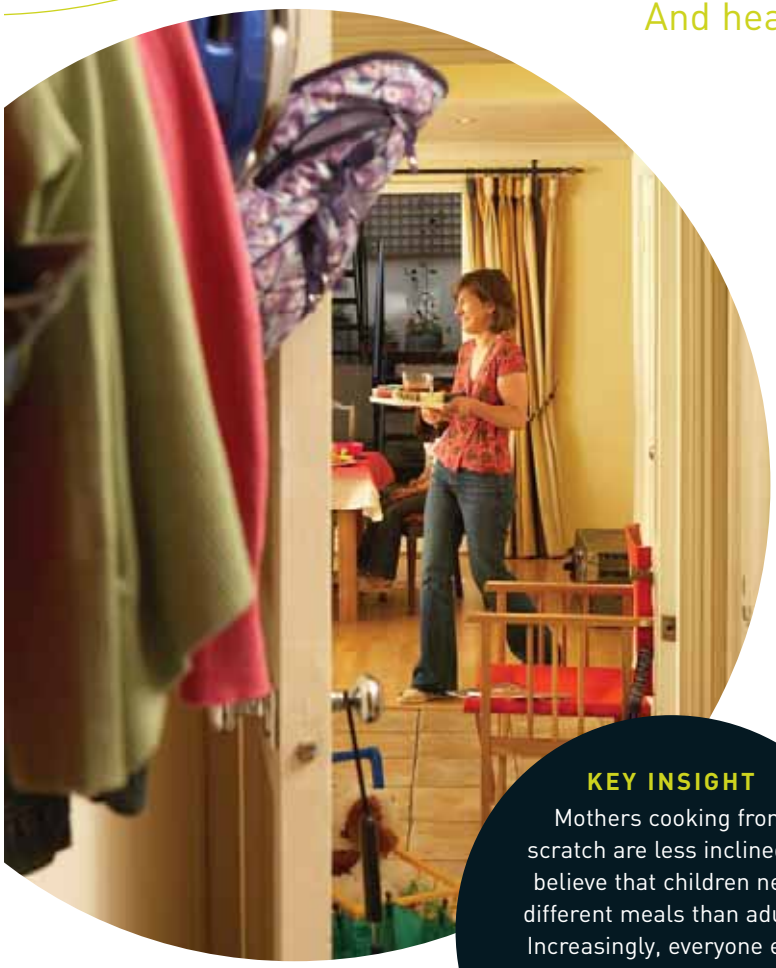
Volume year-on-year % change

Many of the traditional cooking categories have shown a strong sales uplift over the past two years.



Mums show they care - and are in control

Whether it's the Jamie factor convincing Mums to prepare 'better' meals or whether his campaign for 'proper' school meals has happily coincided with a return to these values, the effect is the same - Mums are taking back control of what their children eat. And health is at the top of the agenda.



KEY INSIGHT

Mothers cooking from scratch are less inclined to believe that children need different meals than adults. Increasingly, everyone eats together, preferably at the same time and mothers encourage their children to try different flavours.

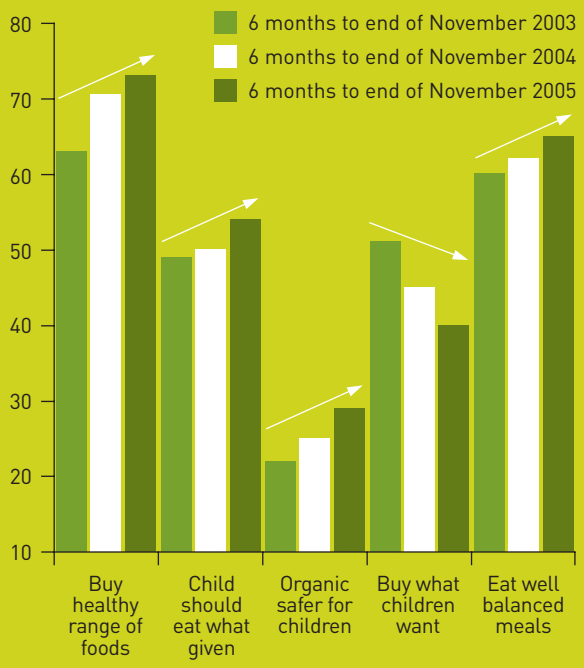
More mums are saying that they are buying a healthy range of foods; more are agreeing that their children should eat what they are given and less and less are they inclined to buy only what their children want; and they're increasingly telling us that they are serving well-balanced meals (chart 7).

We can see from the list of fastest growing products served at children-only meals (chart 8) that health is becoming more important to children: fruit and vegetables are on the rise and even snacks with dried fruit are following the trend.

Further evidence, indeed, that conscientious Mums are regaining control.

This is having a knock-on effect on school meals where there has been a recent acceleration in the declining trends of children having both meals and snacks where these are provided by the school and a resurgence in children's lunchboxes brought from home (see page 9).

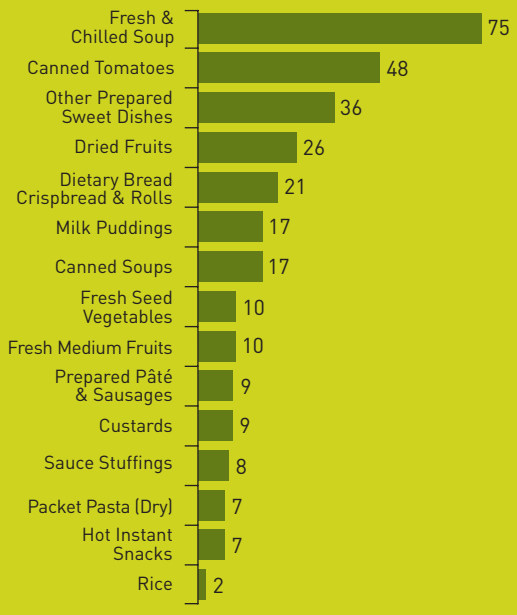
Chart 7
Parental control increasing



% in Households agreeing to the statement

Parental control is increasing with well-balanced, healthy meals very much on the menu and less notice taken of what children themselves want.

Chart 8
Fastest growing products at the child only occasion



% Change November 2005 Vs November 2004

Health is becoming evidently more important in children's meals: fruit and vegetables are amongst the fastest growing items and even snacks featuring dried fruit are on the increase.



'Jamie has changed things - I used to have a whole freezer full of processed foods. Now the children are more health conscious.'

Source: Focus group research among BC1 mothers aged 25-45

'Diets high in processed foods are causing bad behaviour and learning difficulties in children.'

Source: Oxford University's Department of Physiology.

What's In....

Mineral water
Fresh fruit
Pure juices
Dairy drinks

What's out

Carbonates
Cakes, tarts, pastries and biscuits
Chips and baked beans
Confectionery, crisps and nuts

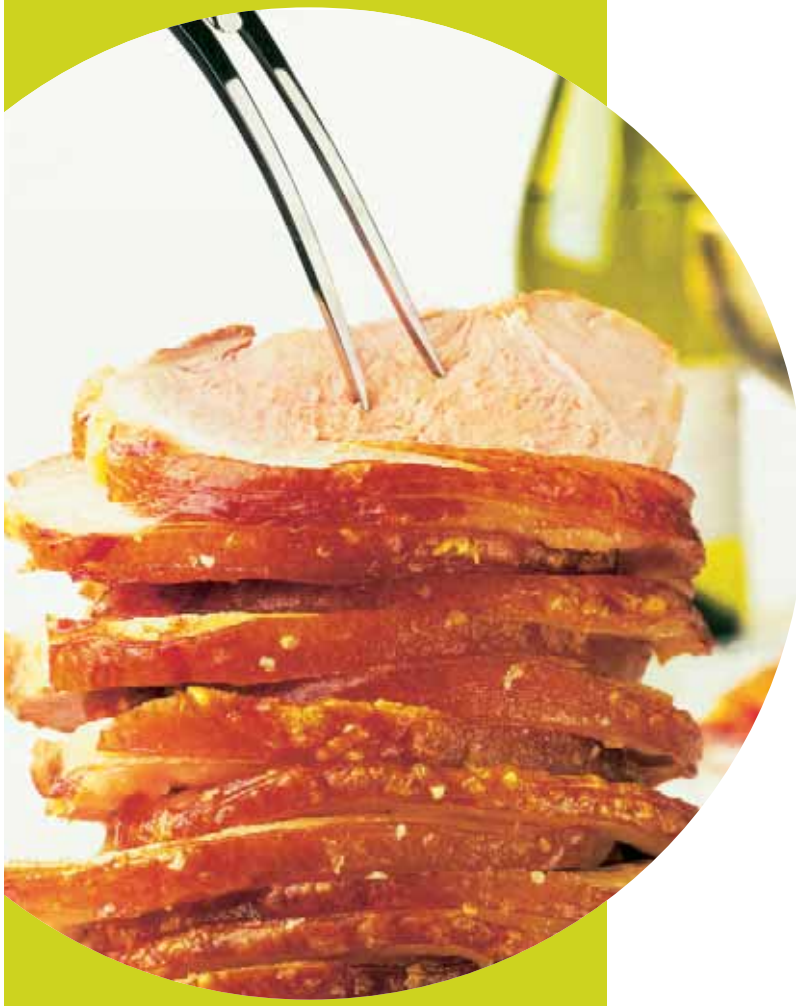


KEY INSIGHT

Sunday remains a special day in many ways for the British. While ethnic cuisines grow in popularity, traditional British fare takes centre place on Sundays, with the Sunday Roast at the heart of the meal occasion - both in home and out-of-home.

The day of the week matters, too...

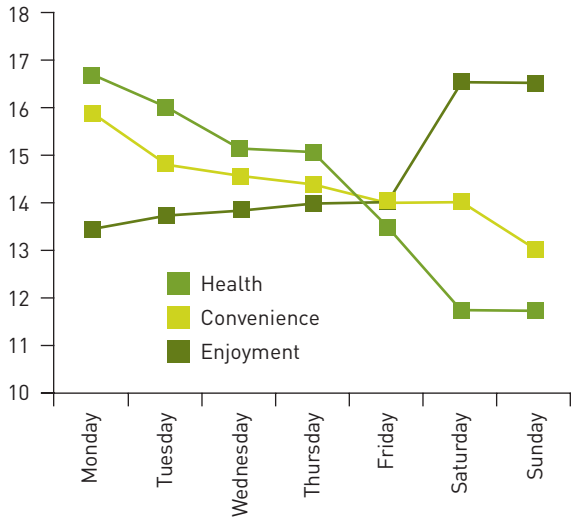
While Health is increasingly a motivating factor in our choice of meals, it's not an unhealthy obsession. We are quite prepared to indulge a little over the weekend - so Mondays to Thursdays are very much about eating with Health in mind; Saturdays and Sundays are much more about Enjoyment (chart 9)



The effect this has on the 'top 5' choices of meals prepared throughout the week is shown (chart 10) and it can be seen that a Sunday is still about Roast Meats for families in Britain.

Chart 9

Key Drivers of Consumption by day of the week



Millions of meal occasions

Each of the core drivers of consumption - Health, Enjoyment, Convenience - have differing relevance to consumers as the week progresses and this makes a difference in determining the types of meals they favour throughout the week.

Chart 10
Top five meals by day of the week

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Sandwiches	Sandwiches	Sandwiches	Sandwiches	Sandwiches	Sandwiches	Roast Meats
Roast Meats	Hot Meat Pies	Hot Meat Pies	Ready Meals	Ready Meals	Sausages	Sandwiches
Soup	Ready Meals	Ready Meals	Hot Meat Pies	Hot Meat Pies	Hot Meat Pies	Sausages
Hot Meat Pies	Soup	Soup	Soup	Fish	Ready Meals	Soup
Ready Meals	Sausages	Sausages	Sausages	Soup	Soup	Hot Meat Pies

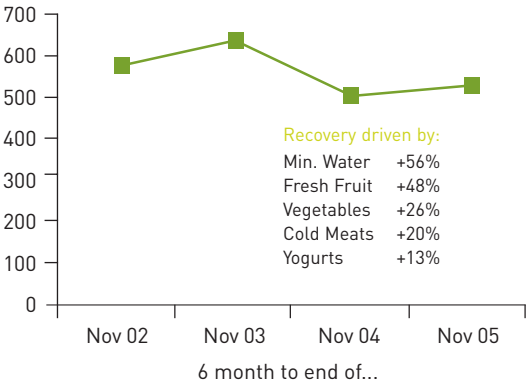
Roast Meats on Sundays is all about enjoyment - and they are often finished off on a Monday as a cold meat. For the rest of the week, the UK's number one meal centre is the sandwich.

...including schooldays!

Paradoxically, Jamie Oliver's campaign to improve school meals and the Government's pledge to increase spending on them, have coincided with an accelerating decline in the numbers of meals and snacks served in schools (charts 11 and 12).

However, that has also coincided with a resurgence in lunchbox meals at schools (chart 13) - another sign that Mums are taking back control of what their children eat even at school. The fact that Health is increasingly given as the reason both for providing the lunchbox and its contents (chart 14) is a further sign of parents' role in feeding their children a healthier diet.

Chart 13
Lunchboxes at school



Millions of consumption occasions

Children's lunchboxes are making a comeback - driven by health-conscious parents providing more mineral water, fresh fruit and vegetables.

Chart 11
Meals at schools

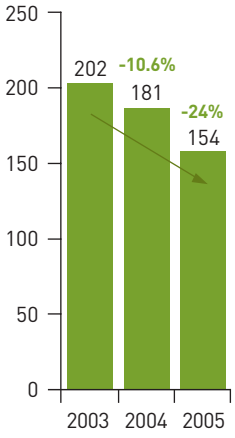
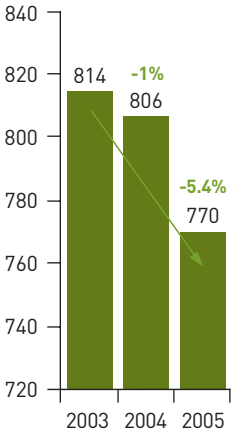


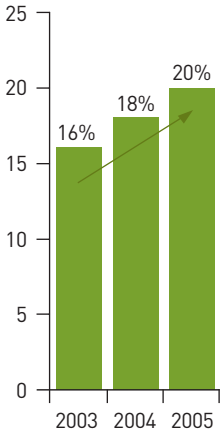
Chart 12
Snacks at schools



Millions of consumption occasions

Both meals and snacks provided at schools are showing an accelerating decline.

Chart 14
Health as the reason for Children's Lunchboxes



Percentage giving Health as reason for lunchbox contents

The content of 1 lunchbox in 5 is now mainly decided by reasons of Health.