CONSUMER INSIGHTS

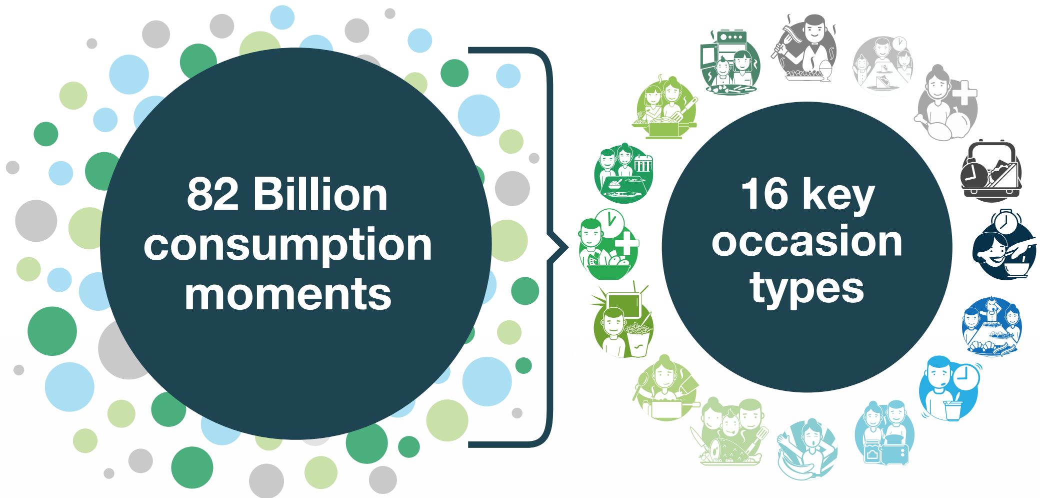
March 2021

UNDERSTANDING CONSUMER NEEDS BEHIND IN-HOME MEALS

The UK's 27 million households have a collective 82 billion consumption moments each year, providing a huge opportunity for our industry to influence what people choose to eat. The challenge for AHDB and the wider industry is that each of these is different, with different drivers and fulfilling different needs, making it difficult to analyse and evaluate consumers' decision-making about what to buy, cook and eat on a daily basis.

To better understand how and why consumers use food products in the home, we have worked with Kantar to group meal occasions into clusters, sharing core drivers and distinct needs. These clusters will help influence people in their product choices through targeted messaging and marketing, creating a connection with that cluster and ultimately driving sales. AHDB has been using these clusters over the last year to shape our strategy and improve our marketing through a more targeted approach. The aim of this report is to share with the rest of the industry some of the insight we have used successfully internally as we feel it could be of great benefit to a wide variety of companies and stakeholders.

We have collated 82 billion consumption moments in to 16 key occasion types



WHY?

While we hold a huge amount of data on what people are eating, this work is focused on the 'why'. By understanding the needs people are trying to meet when considering what to eat, we can better understand what drives each consumption decision and see what our products were competing against.

This research was undertaken before coronavirus. We have used the past year's worth of data (52 w/e 17 May 2020) in this report, so some of the lockdown increases in in-home occasions will be dampened. A coronavirus case study features on page 16 to show an example of how coronavirus has influenced the dynamics of meals eaten in home.

This infographic illustrates the difference in approach, using sausages as an example, but the same is true with other meat cuts, dairy products and potatoes.

Our research has combined the ‘what’ and the ‘why’ to gain this deeper understanding of consumers’ needs. It has identified 16 unique occasions with distinct characteristics, allowing us to see how our sectors can fulfil those needs. However, it is important to remember that enjoyment is the number one driver for every occasion, so taste is essential across all occasions.

Clustering research approach

This research was conducted by Kantar and AHDB throughout 2019, using data from the 52 weeks ending 24 March 2019.

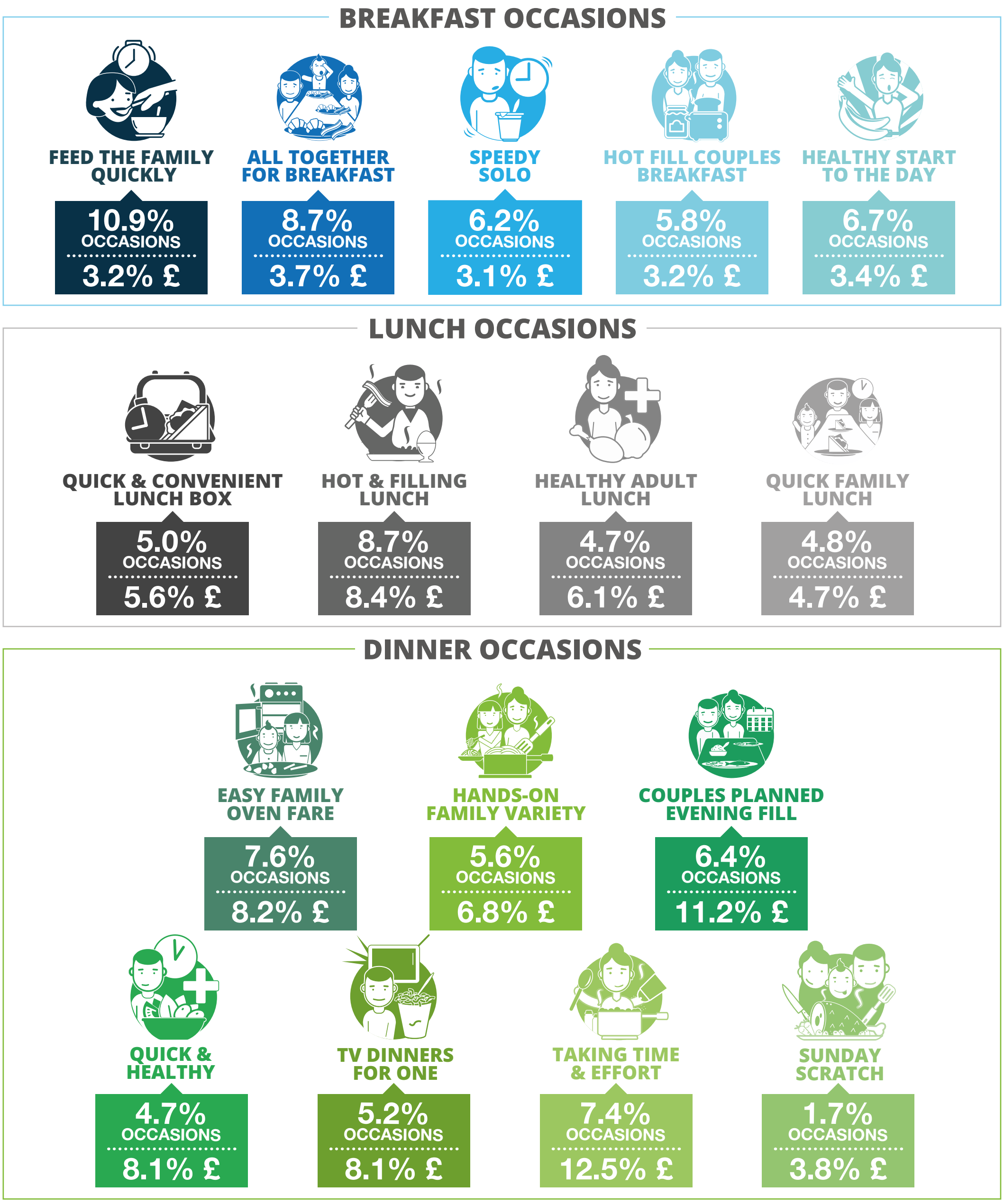
As our primary focus was to understand meat, dairy and potato occasions, we haven’t looked at all 82 billion occasions. We have included only full meal occasions eaten in home for this piece of work, leaving us with 48 billion full in-home meal occasions to analyse.

Kantar’s analysts used a K-means factor cluster process to create the individual groups. Every individual reported occasion scored against a wide range of variables that describe the occasion – the occasion blueprint. The clustering algorithm compares all blueprints and measures how close they are to each other. This process identifies major concentrations of closely related occasions – our clusters.

MEAL OVERVIEWS

We have identified five breakfast occasions, four lunch occasions and eight dinner occasions.

Figure 1. Percentage of occasions vs percentage of total spend (£)



Source: Kantar/AHDB, Segmentation, 52 w/e 24 March 2019

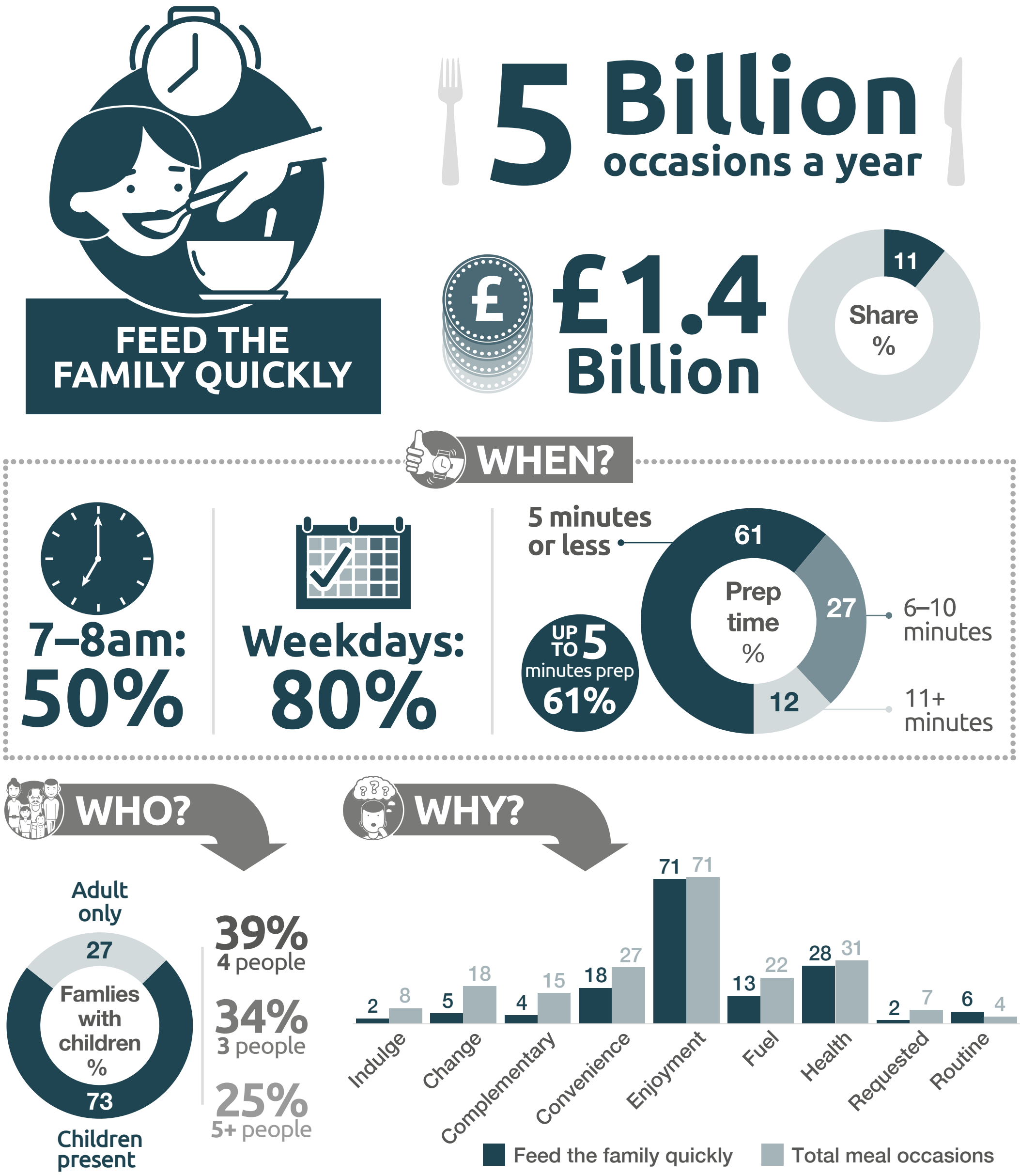
For the purpose of this report, we have focused on four occasions most relevant to our levy-paying sectors:

- **Breakfast** – Feed the family quickly. The biggest occasion for liquid milk and the fastest growing
- **Lunch** – Healthy adult lunch. The biggest occasion for cheese and sliced cooked meats. It is also the fastest growing for cheese
- **Dinner** – Taking time and effort. The biggest occasion for all primary red meats and fresh potatoes. It is the fastest growing for primary pork, frozen potatoes and sliced cooked meats
- **Dinner** – Easy family oven fare. The biggest occasion for sausages and frozen potatoes

For insight into the remaining 12 categories, please contact strategic.insight@ahdb.org.uk

FEED THE FAMILY QUICKLY

This breakfast occasion is all about speed and enjoyment. The need centres on feeding the family quickly before heading out the door to school and work, but it still needs to be tasty. More than half of these meals are prepared in less than five minutes and they are often eaten earlier in the morning, with toast and cereal playing key roles.



Source: Kantar/AHDB, Segmentation, 52 w/e 24 March 2019

Trends in this occasion

This is the most popular breakfast meal, featuring 4.9 billion times in the past year, and is also growing, with an additional 145 million occasions year-on-year and an extra £54 million spent. However, at only 32p per meal per person, it is the cheapest occasion of all. So products or brands wanting to target this occasion will need to be very price-conscious and/or high volume. Coronavirus may have seen time pressures ease during the first full lockdown with schools and remote working, but as the nation's consumers become more mobile, this would be expected to creep back to more traditional levels shown.

What sorts of dishes and products feature at this occasion?

Examples of this type of breakfast are cereal, toast or fruit for the whole family.

Top ingredients are the items which feature at the occasion most often. Over-indexing ingredients are those which are more likely to feature at this occasion compared with other meals.

Table 1. Top ingredients and over-indexing ingredients at Feed the family quickly

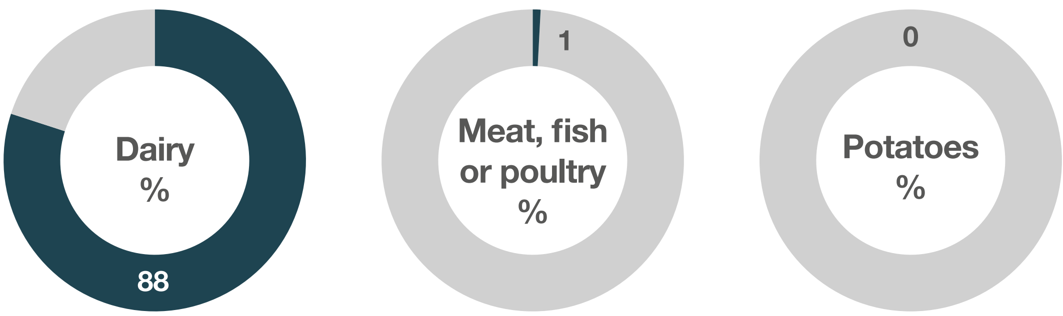
Top ingredients by %		Top over-indexing ingredients	
Milk	83	Cereal/fruit bars	ix.433
Breakfast cereals	82	Breakfast cereals	ix.363
Fruit	15	Toaster pastries	ix.300
Bread	8	Food drinks	ix.233
Butter, spreads and margarine	6	Chocolate spread	ix.183

Source: Kantar/AHDB, Segmentation, 52 w/e 17 May 2020

How do key categories play in this occasion?

Dairy is essential at this meal, with 83% of occasions featuring cow's milk, accounting for more than half of all spend on this occasion. It is also a growing occasion for dairy, adding 97m occasions in the past year and an extra £30m to the dairy category. While occasions are growing, value isn't keeping pace, so finding ways to add value to the humble four-pint semi-skimmed would be a good avenue to explore.

Figure 2. Category inclusion in meals



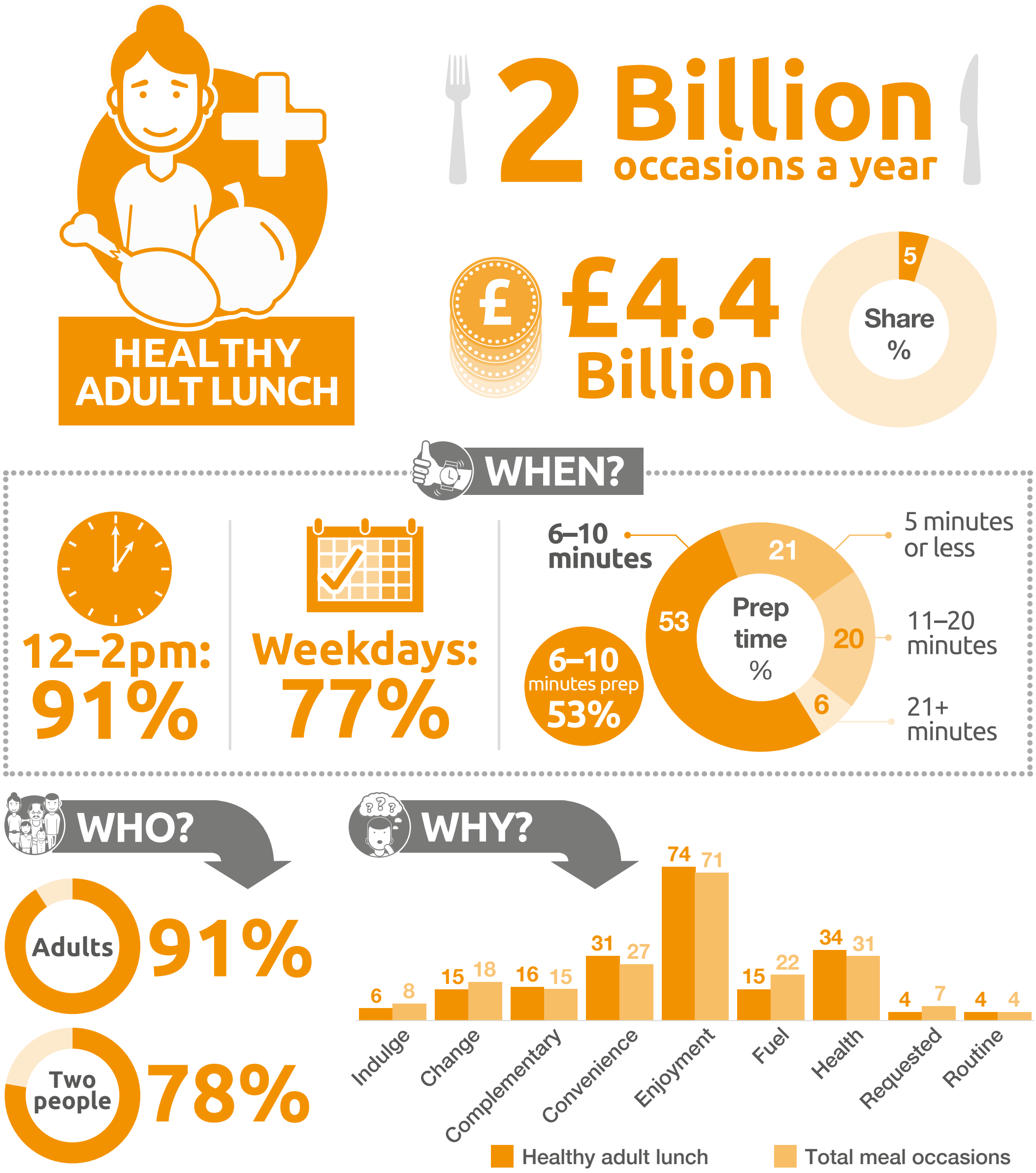
Source: Kantar/AHDB, Segmentation, 52 w/e 17 May 2020

Opportunities for dairy in this occasion would be to diversify and to encourage consumers to trade up. Yogurt and butter play a small part in this occasion. Yogurt has only seen modest growth of 6.7m occasions, growing slower than the occasion as a whole, so is losing share. Promoting yogurt with or on cereal could boost sales, as well as increasing the value of dairy at this meal.

With longer cook times, meat and potatoes don't feature at this occasion.

HEALTHY ADULT LUNCH

Healthy adult lunches are planned and practical lunchtime meals. Enjoyment is still a main driver of these meals, so taste is important, but health is a consideration for more than a third. As a lunch occasion, simplicity and ease are key, with minimal cooking and prep time. These occasions are about fuel and health, with little indulgence or celebration. Despite this, health comes at a premium, meaning this has the most spend per occasion for lunchtime meals at £1.84.



Source: Kantar/AHDB, Segmentation, 52 w/e 24 March 2019

Trends in this occasion

This previously stagnant occasion has seen growth as more people ate lunch in home during the coronavirus lockdown. Over the past year, there have been an additional 116m occasions, most of which were in the three months previous to this report. Dairy, meat and potatoes all saw growth in the number of occasions but not to the same extent as the total occasion, meaning they lost share. There has been a significant rise in lunches eaten at home since coronavirus and the associated restrictions came in to place. Similar to the breakfast occasion, the easing of restrictions will lower the number of in-home lunch occasions from the heights seen during 2020. However, it is likely that we will continue to see more remote working and adjustments to work patterns, which may mean slightly higher in-home lunches than we would have otherwise expected pre-pandemic.

What sorts of dishes and products feature at this occasion?

Like many lunch occasions, sandwiches are a popular choice here, with over half of all Healthy adult lunches being sandwiches. Processed meats such as ham and corned beef are popular choices, along with cheese. Many are accompanied with a bag of crisps, highlighting that health is just one of the drivers. Salads are also more likely to feature here, but account for just 4% of these meals.

Table 2. Top ingredients and over-indexing ingredients at Healthy adult lunch

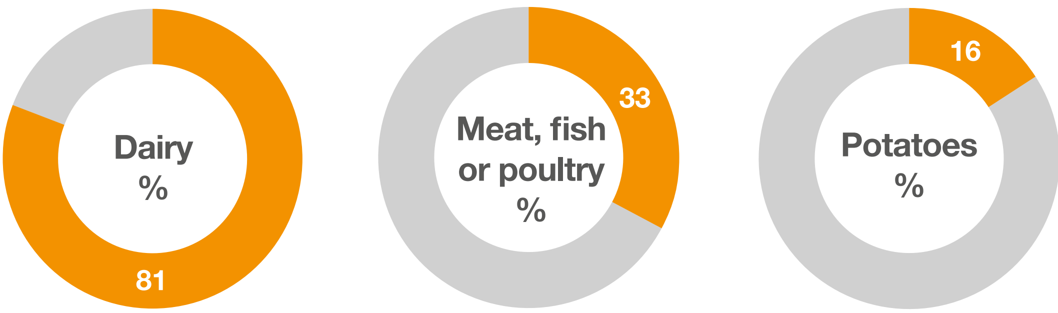
Top ingredients by %		Top over-indexing ingredients	
Bread	62	Chilled sandwich fillers	ix.650
Butter, spreads and margarine	50	Crackers	ix.571
Milk	43	Processed beef	ix.308
Cheese	31	Cheese	ix.261
Fruit	29	Butter, spreads and margarine	ix.223

Source: Kantar/AHDB, Segmentation, 52 w/e 17 May 2020

How do key categories play in this occasion?

This is the second-biggest lunch occasion for dairy, both in terms of spend and occasions. Dairy features in more than four out of five of these meals and is in growth, seeing an extra 113m meals this year than the previous year and 77m more featuring cheese. The majority of this increase comes from Cheddar (+51m occasions) rather than speciality cheeses, although they still saw growth (+17m occasions). In terms of spend, nearly £13m more Cheddar was bought this year than the year before and, due to the higher price point, speciality cheeses increased sales by £16m over the past year.

Figure 3. Category inclusion in meals



Source: Kantar/AHDB, Segmentation, 52 w/e 17 May 2020

Cheese is consumed in a number of ways at this occasion, but sandwiches and salads are popular choices. Sliced and grated cheese also perform well as a convenient sandwich filling.

Due to the large number of sandwiches, this is also an important meal for butter, featuring in more than half of these occasions. Butter, spreads and margarine (BSM) grew by 126m occasions last year. This is faster than the total occasion, so they are taking share. This shows a boost to the number of sandwiches people consumed during lockdown. Previously, growth for BSM was slowing at this occasion due to a move away from sandwiches towards wraps, pittas or other sandwich alternatives, which are less likely to use butter.

Hot drinks are a staple of this meal and milk features at 43% of these occasions. The previous long-term trend for fewer hot drinks has reversed and milk has grown by 24m occasions at this meal. These are normally consumed out of habit and routine. However, milk is losing share of this occasion, so encouraging tea drinking with this meal would help to increase milk consumption.

Yogurt saw a decline of 2.9m occasions at this meal last year. The healthy perceptions of yogurt mean it is viewed as a good accompaniment to these meals. Before coronavirus, yogurt products with a health claim did especially well, but health has dropped for some as a priority.

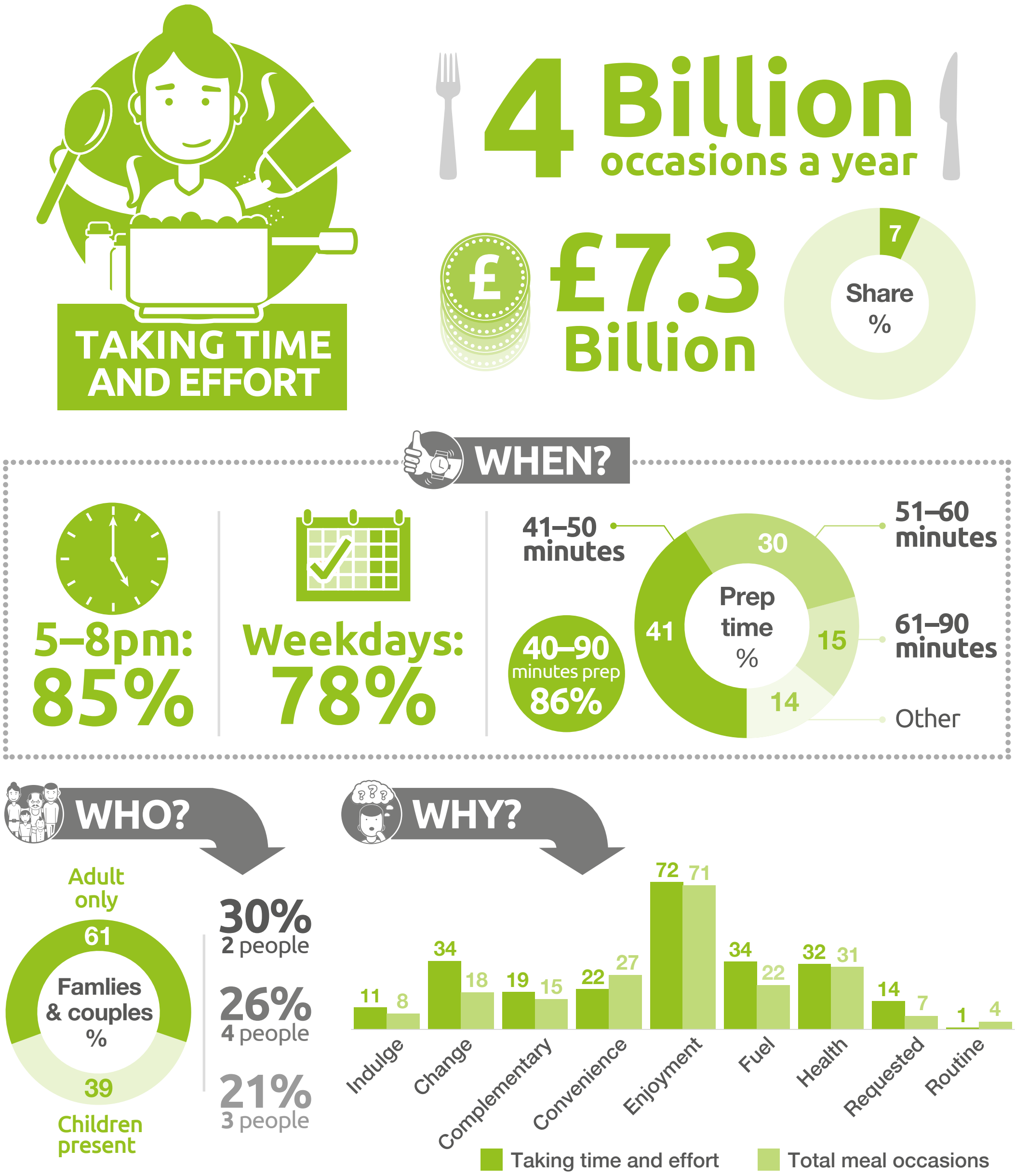
Meat, fish and poultry are seeing minimal growth at this occasion (+9.1m), but before lockdown they were in decline. Sliced cooked meats (SCM), such as ham, are the most popular meat at this occasion, featuring at a third of them. However, we have seen minimal growth for the category. Promoting ham sandwiches as a quick lunchtime option would be beneficial in the short term, but long-term strategies should try to promote SCM without the sandwich element. Another popular processed meat at this occasion is corned beef, again often used as a sandwich filling. This faces similar challenges but is more likely to be eaten by an older demographic. Pastries featuring meat, such as sausage rolls and meat pasties, are also popular at this occasion. To grow SCM in this occasion, a strong health message is needed as convenience alone is not enough.

Crisps are another popular choice, featuring at 13% of these occasions and accounting for the majority of potato consumption across all lunch occasions. Crisps saw growth of nearly 43m occasions at the Healthy adult lunch in the past year. This was the biggest area of spend growth for crisps at lunchtime (+£35m) but was only the third-biggest growth in occasions. This shows that consumers are choosing more premium crisps at these occasions, perhaps those with a health benefit. Before lockdown, crisps were still in growth at this occasion, but this was minimal compared with the growth in the past three months. Fresh potatoes very rarely feature at this occasion, but there is room for growth of potato salad. Not many consumers are cooking fresh potatoes from scratch at this occasion. Using leftovers from the night before means the prep time is still within the short 6–10-minute range.

An example of an innovative Healthy adult lunch is our pork salad with mango and lime. Find the recipe at **lovepork.co.uk/recipes/pork-salad-with-mango-and-lime**

TAKING TIME AND EFFORT

This is the most valuable evening meal but accounts for a similar number of occasions as other evening meals, showing this is an occasion where people are both willing to splash out and there are also more mouths to feed. These are occasions designed to bring the family together and celebrate or have a treat. More time is spent preparing these meals and they're often cooked from scratch.



Source: Kantar/AHDB, Segmentation, 52 w/e 24 March 2019

Trends in this occasion

Taking time and effort was the biggest-growing dinner occasion in the past year, with an additional 124m occasions and an extra £315m spent. In lockdown, many families took the opportunities to eat together and spend a little longer cooking, which is why this occasion has seen such significant growth. However, Taking time and effort meals were in growth before lockdown as consumers turned to cooking from scratch more. The coronavirus restrictions have provided greater opportunity for consumers to cook from scratch as people are at home more often and are spending less time commuting. Also, this is often a more economical way of cooking, so we see more consumers turning to scratch cooking during times of high price sensitivities and economic uncertainty.

What sorts of dishes and products feature at this occasion?

Examples of this type of dinner are casseroles, spaghetti Bolognese and cottage pie. These dishes are more likely than other evening meals to be roasts or to feature Italian cuisine.

Table 3. Top ingredients and over-indexing ingredients at Taking time and effort

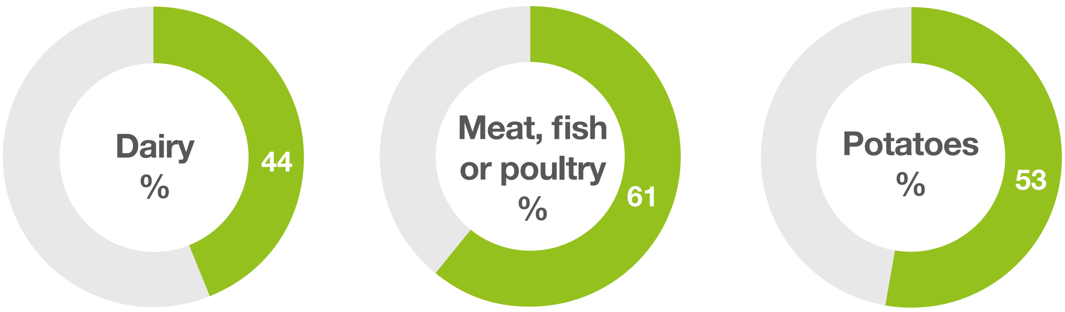
Top ingredients by %		Top over-indexing ingredients	
Fresh potatoes	40	Primary beef	ix.409
Total chicken	24	Primary lamb	ix.380
Milk	20	Primary pork	ix.364
Beef	19	Sweet potatoes	ix.360
Rice	17	Fresh potatoes	ix.357

Source: Kantar/AHDB, Segmentation, 52 w/e 17 May 2020

How do key categories play in this occasion?

Dairy in this meal grew by 68m occasions this year, with consumers spending an extra £39m. Cheese features in 15% of all occasions, often for grating onto pasta or including in a sauce. Cheese has seen growth of 25m occasions in the past year.

Figure 4. Category inclusion in meals



Source: Kantar/AHDB Segmentation 52 w/e 17 May 2020

Cream is also more likely to feature at this occasion than other dinner occasions, either as a part of the savoury main meal as a cooking ingredient in sauces or as part of dessert.

Since lockdown, consumers have treated themselves to more desserts, but yogurt was the star performer, over cream. This is one of the few meals where yogurts have seen significant growth (+31m occasions), as consumers have been indulging more and having desserts more often. There are likely children present at this occasion and, although yogurt is a treat, it is also viewed as healthy by many. This shows there are still opportunities for dairy to grow and feature at more of these meals.

Meat, fish or poultry are important to Taking time and effort, featuring in almost two-thirds of these occasions. Fresh primary meat is the most likely to feature, including small roasting joints, chops or steaks, but sausages and mince are also important. Overall, this is the biggest occasion for primary beef, lamb and pork.

Despite being a growing occasion overall, primary red meat declined 24m occasions in the past year at this meal, while primary poultry has seen rapid growth. These declines come from primary pork and lamb, whereas beef has seen a change in fortune since lockdown, with growth of 29m occasions. Securing red meat's place at this occasion is essential in order to see a return to growth for lamb and pork. These meals are about getting the family together and enjoying together time. Making the occasion special, rather than everyday, is important and could be a winning strategy for red meat. Positioning red meat as a way to bring the family together, making it worth the additional cooking time, could help support growth.

Before lockdown, we had seen growth for sliced cooked meats at this meal, although from a smaller base. Examples would be adding ham to pasta dishes or using chorizo for flavour, providing the treat and taste elements of meat but with less prep and cooking time.

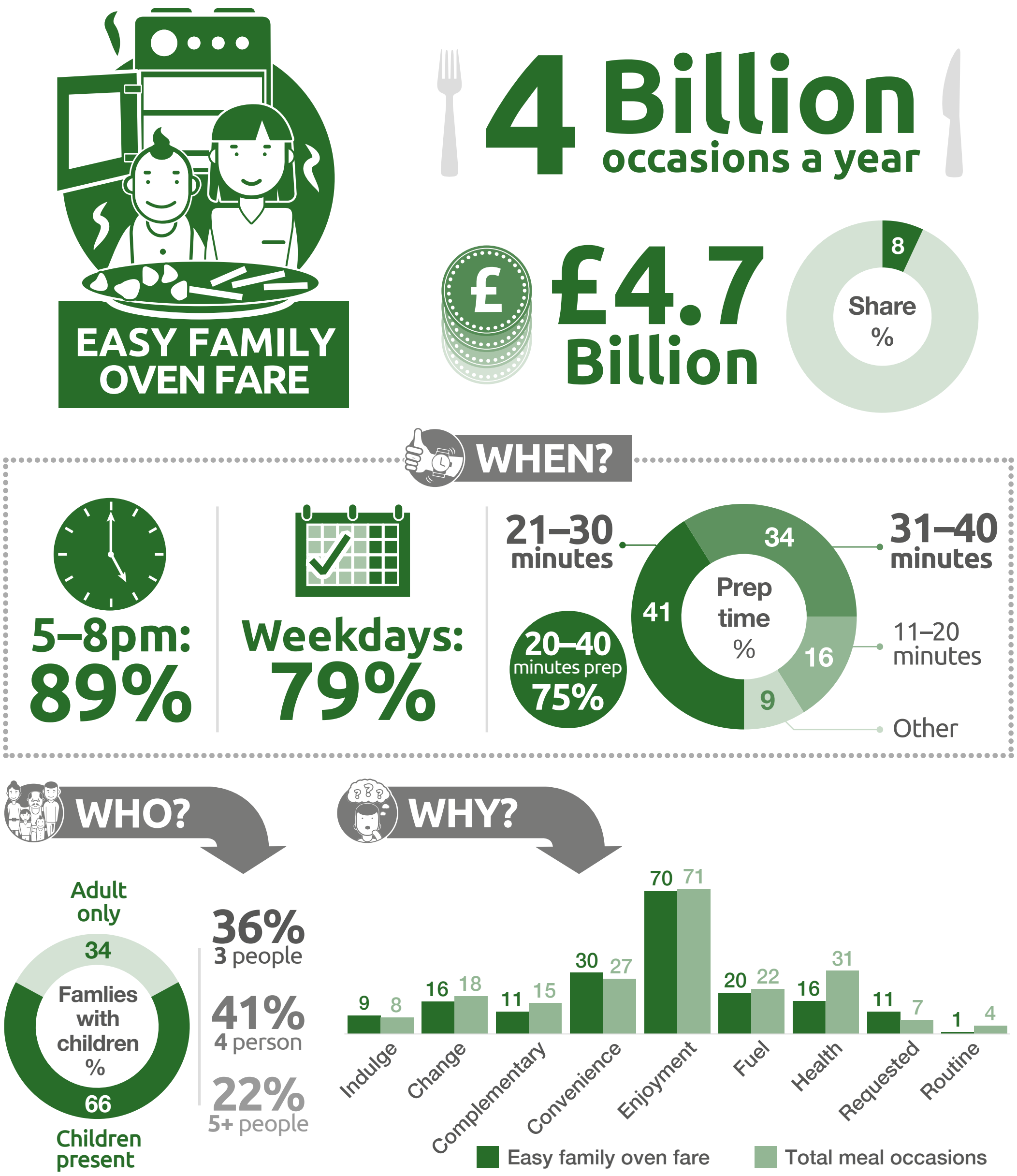
Fresh potatoes feature in 40% of all the Taking time and effort occasions, growing by 82m in the past year. Roast and mashed potatoes are the most popular preparation methods, with growth coming from main crop potatoes (+90m occasions). This outweighed losses from baking (-3.9m occasions) and new potatoes (-5.3m occasions) – the opposite trend from before lockdown. As many retailers condense their offerings and consumers only shop once a week, larger bags of potatoes have returned to growth.

Despite this occasion having longer prep times and more cooking from scratch, this an important occasion for frozen potatoes. Before lockdown, we had seen growth in frozen potatoes at this occasion, which showed that despite the longer cooking time, there is still a desire for convenience, with frozen roast potatoes or a side of chips still featuring. However, now frozen potatoes have gone in to decline at this occasion, as consumers increase cooking from scratch and some may be trying to save money. Although a tiny category, instant mash is four times as likely to feature at this occasion, showing consumers are still looking for convenience.

An exciting dish for a Taking time and effort occasion is our spiced shredded lamb. Find the recipe at **simplybeefandlamb.co.uk/recipes/spiced-shredded-lamb**

EASY FAMILY OVEN FARE

Convenience is a main driver of this type of occasion. Families are looking for a simple and easy meal, often requested by other members of the family. Ease is a main driver, but that does not necessarily mean quick, with most meals taking between 20 and 40 minutes to prepare and cook. This is due to many of the ingredients used at these meals being frozen, increasing the cooking time. Baking in the oven is the main cooking method for many of these dishes.



Source: Kantar/AHDB, Segmentation, 52 w/e 24 March 2019

Trends in this occasion

This meal type saw moderate growth last year in both spend (+£197m) and occasions (+105m). This is the cheapest of all the evening meals, with only £1.48 spent per person per occasion, so it is important to get the price point right to target this occasion. Less expensive products, such as sausages and both fresh and frozen potatoes, perform well at this type of meal.

What sorts of dishes and products feature at this occasion?

Examples of dishes include pizza, sausage or chicken nuggets, with chips or pie and mash.

Table 4. Top ingredients and over-indexing ingredients at Easy family oven fare

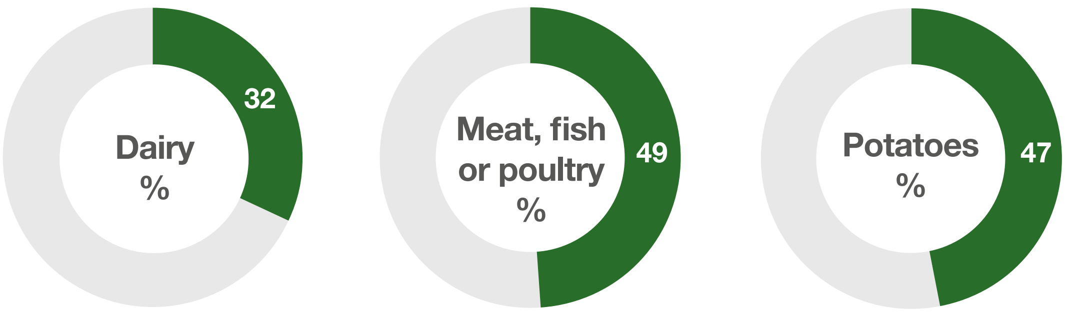
Top ingredients by %		Top over-indexing ingredients	
Frozen potato products	24	Oven chips	ix.466
Chicken	21	Primary fish	ix.270
Fresh potatoes	21	Processed chicken	ix.244
Cheese	12	Pasta	ix.235
Pasta	11	Processed lamb	ix.200

Source: Kantar/AHDB, Segmentation, 52 w/e 17 May 2020

How do key categories play in this occasion?

Despite being present at nearly a third of these occasions, this isn't a strong meal occasion for dairy. Cheese is the most likely dairy product to feature here (400m occasions), but other types of dairy rarely feature in the main meal. There could be considerable hidden dairy, and pizza is popular at this occasion. There has been modest growth for dairy at this occasion, growing 53m occasions year-on-year, with cheese seeing growth at this meal of 21m occasions. The opportunities for dairy here lie in the dessert. A lot of the growth at this occasion has come from cream as a dessert accompaniment, showing there is still a desire from consumers to finish these meals with a sweet treat. This is also the most popular evening occasion for fromage frais, but, overall, fromage frais has struggled in recent years due to negative stories around high sugar content. With two-thirds of these meals being eaten by children, it could be a good opportunity for a healthier, child-friendly yogurt or dairy product.

Figure 5. Category inclusion in meals



Source: Kantar/AHDB Segmentation 52 w/e 17 May 2020

The majority of meat at this meal is either processed or mince. Total MFP is growing at this occasion, with an additional 81m meals. However, most of the growth came from poultry, with only 2.2m extra occasions for primary red meat and 2.1m additional occasions for processed red meat, but before lockdown, primary red meat was in decline. Beef is the best performer here, with an additional 13m occasions, particularly beef mince, outweighing losses seen in other meat cuts. This is the opposite to before lockdown when beef mince was the biggest driver of decline. Mince is great for quick and easy family meals and easy to buy in bulk and freeze, which were key trends in panic buying and during lockdown. Once back to 'normal', encouraging quick meals with mince or steak could be the key to growth.

Sausages and burgers saw increases of 7m and 9m occasions respectively. These items are versatile and can go with a variety of accompaniments. They are often favoured by families who might have fussy eaters or parents wanting different dishes to the children.

Here meat isn't just competing with other meats or fish but with other convenience products, such as pizza. Pizza has been a huge growth category for a number of years and it has been a strong competitor. Despite some pizzas containing some meat, it is a much smaller volume than other forms.

Potatoes have seen growth of 75m occasions this year, again a reversal of the trend we saw pre-coronavirus. This is now the biggest growth occasion for frozen potatoes. Chips are the most common form of potatoes at this meal. Oven chips have seen growth in the last year, adding 15m occasions and gaining 11.8m in spend. As oven chips are competing closely with fresh potatoes and other carbohydrates such as pasta, all of which have low price points, any change in price for frozen potatoes can have a detrimental effect on volumes, which we had seen before lockdown. Other processed potatoes, such as waffles or croquettes, have performed well (+11m occasions), showing that frozen potatoes are still an important part of this occasion.

Fresh potatoes have seen a mixed picture increasing by 26m occasions in the last year but declining £1.3m in spend. Mash and jacket potatoes are popular at this meal, meeting the needs for simple and family-friendly fare. We have seen a growth of 7m occasions for baking potatoes at this meal in the past year. During lockdown, health has declined in share of servings, but as this trend returns, the opportunities for fresh potatoes to gain share at this occasion are increased. Simple, family-friendly and healthy potato recipes would do well here. Frozen potatoes with a health message could also see a boost.

For a new take on Easy family oven fare try our leftover pork wedges. Find the recipe at **lovepork.co.uk/recipes/leftover-pulled-pork-with-potato-wedges-and-beans**

KEY CONSIDERATIONS

The turbulence of 2020 has led many consumers to re-evaluate their buying behaviours and consumption patterns. Price, value for money and buying local became more of a priority during lockdown. What we eat and where we shop has seen a dramatic shift over the course of the year. The dynamics of in-home meals in 2020 has been drastic. Coronavirus has impacted day-to-day lives, with everything from panic buying in the supermarkets and working from home to high unemployment and school closures. This has led to consumers spending more time at home than ever would have been anticipated a year ago.

Knowing as many details as possible about how products are consumed and what consumer needs they are meeting allows us to understand the changing eating landscape. With this we can look for opportunities where certain products are growing and join in with the trend, or identify where products aren't receiving their fair share.

Not only have we looked in detail at these meal occasions but also at the people consuming them, gauging how different households have differing relationships towards meat, dairy and potatoes based on their income, location, media consumption and much more. We are using this information at AHDB to help shape our marketing campaigns and increase our knowledge of consumer trends. Using this data, we have already seen a number of successes, such as our Make it Steak and Milk Your Moments campaigns.

Within this report we have only covered four meal occasions of key importance to our levy-paying sectors, but if you have any questions about our wider research or you would like to know more about specific cuts or how AHDB can help support you in better targeting your products, please send us an email at strategic.insight@ahdb.org.uk

THE IMPACTS OF CORONOVIRUS

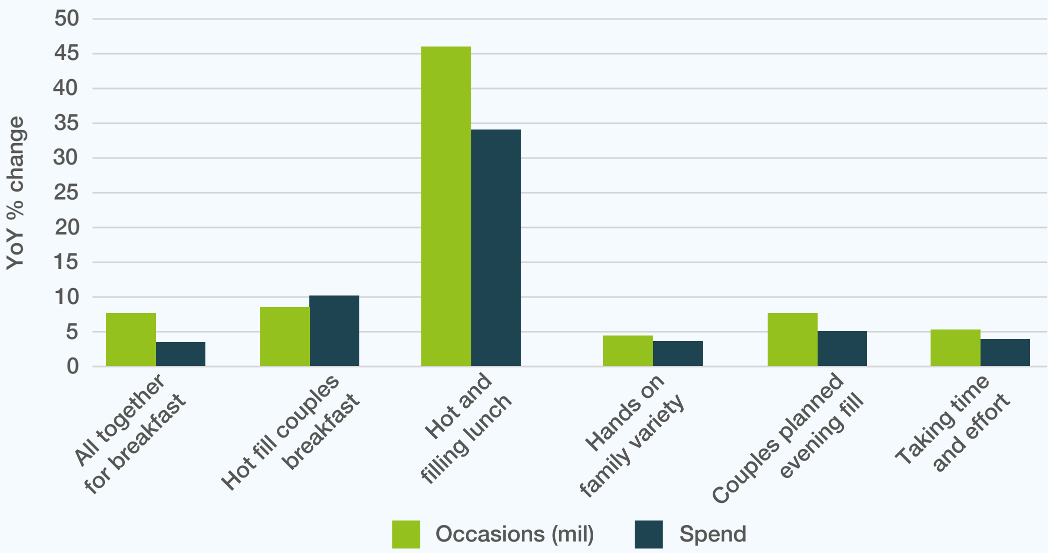
Coronavirus has changed the way that we eat dramatically, with meals eaten in the home growing by 45% for the eight weeks to 17 May 20, according to Kantar. So how have a few different products been impacted by these changes?

Bacon

When we look at bacon, growth has primarily been driven by the lunch occasion. The Hot and filling lunch has seen the majority of growth, with occasions featuring bacon growing by 121%. These types of occasions are cooked lunches for families and couples. This boost for lunch occasions is interesting as we know consumers are at home more during lockdown, but they are treating themselves to cooked lunches rather than just a sandwich or salad. Knowing that bacon is a popular choice at this occasion can help us to continue the momentum and promote bacon within these familiar meals. We can see that people are spending the same amount on bacon per occasion, whereas other meals have seen spend on bacon increase. So there could be opportunities to encourage consumers to trade up here.

A meal where spend hasn't kept pace with occasions is All together for breakfast. We have still seen growth here in occasions of 20%, but this is below the growth in total meals, so is losing share. This shows that although consumers may have more time to cook breakfast for the family, they aren't taking full advantage of this. Spend on bacon per occasion has decreased 6.8% since last year. This is an occasion where families are getting together and spending quality time. This normally means they are willing to spend a little extra. Messaging centered around indulging and treating the family could encourage spend in this area.

Figure A. Bacon occasion and spend growth



Beef steak

The story looks very different for beef steaks. There are two key occasions for steak, both at the dinner occasion: Couples planned evening fill, which has seen a 16% growth in occasions and Taking time and effort, which has seen growth of 85%. This may be because consumers want to spend more time together as a family, with parents having fewer meals together as a couple. In addition, with no one going out to eat in restaurants, we saw people try to recreate restaurant meals at home, whether as a family or a couple. As these tend to take more time and effort to cook, their occasions now fall in to this segment, rather than Couples evening fill. Spend on steak per occasion has dropped 19% for Taking time and effort to £2.83. As this is the cost per occasion, it may show that consumers are bulking steak meals out with other ingredients to make the meat go further. As more children eat at these occasions, smaller portion size could also have an impact.

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AHDB's Retail and Consumer insight team track and analyse consumer shopping and consumption trends and communicate what they mean for the agricultural industry.

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AHDB is a statutory levy board, funded by farmers, growers and others in the supply chain. Our purpose is to inspire our farmers, growers and industry to succeed in a rapidly changing world. We equip the industry with easy to use, practical know-how which they can apply straight away to make better decisions and improve their performance. Established in 2008 and classified as a Non-Departmental Public Body, it supports the following industries: meat and livestock (cattle, sheep and pigs) in England; horticulture, milk and potatoes in Great Britain; and cereals and oilseeds in the UK. AHDB's remit covers 72 per cent of total UK agricultural output. Further information on AHDB can be found at **ahdb.org.uk**

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