

“NO ACCOUNTING FOR TASTES”

INTRODUCTION

This report presents the findings of a quantitative study carried out on behalf of the Sunday Tribune by Behaviour & Attitudes during August 2000.

The overall objective of the research was to gain an understanding of how Irish people’s eating habits have changed over the past decade. In particular we wished to explore changes in:-

- What we eat and drink
- Where we eat
- How we feel about these changes (our anxiety attacks about what we eat)

- How much we spend: specifically in the areas of eating out or buying take-away or home delivery food

We were fortunate in having benchmarks for many of these measures in two earlier surveys carried out on behalf of the Institute of Advertising Practitioners in Ireland. The first of these was carried out in 1991, the second in 1995.

By collecting equivalent data in the year 2000 we have trend data spanning most of the last decade. Some of the measurements were excluded from the first of these surveys: largely because they did not seem so important at that stage. For these we have at least got a picture of the growth pattern in the last five years.

TECHNICAL DETAILS

The questionnaire for this survey was included in the Behaviour & Attitudes Barometer Survey for August 2000. This is a syndicated survey conducted among a nationally representative sample of 1,200 adults. The sample is quota controlled in terms of sex, age, social class, region and area of residence to reflect correctly the known demographic characteristics of the adult population of the Republic of Ireland.

All interviewing was carried out by trained members of the Behaviour & Attitudes' fieldforce, working under supervision. Our normal quality control checks were applied.

The technical appendices to this report include:-

Appendix A – Analysis of Sample

Appendix B – Sampling Locations

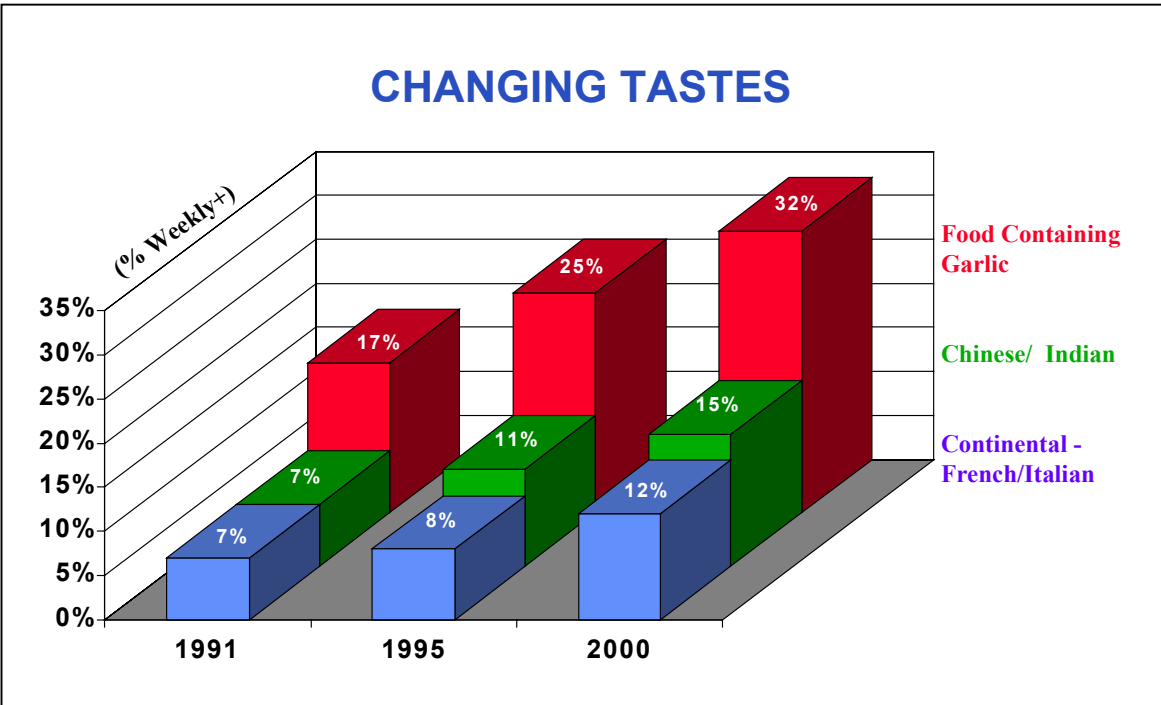
Appendix C – The Questionnaire

SECTION ONE
“WHAT DO YOU FEEL LIKE?”

1.1 “Something a Little Spicy Perhaps?”

It seems clear that our tastes are veering increasingly towards the exotic.

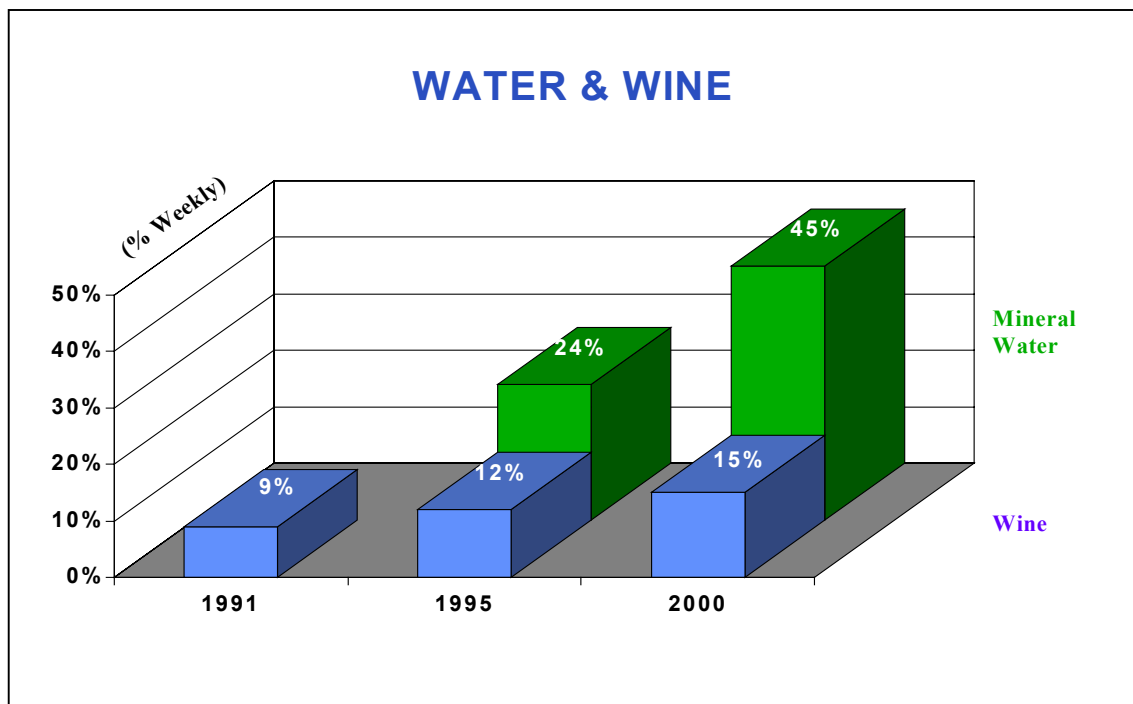
In a typical week nowadays about a third of Irish adults consume food containing garlic. About 1 in 7 of us has a Chinese or Indian meal in a typical week and about 1 in 8 a Continental meal.



It can be seen from the chart that the popularity of these individual options has each approximately doubled in the past ten years.

1.2 “And To Wash That Down?”

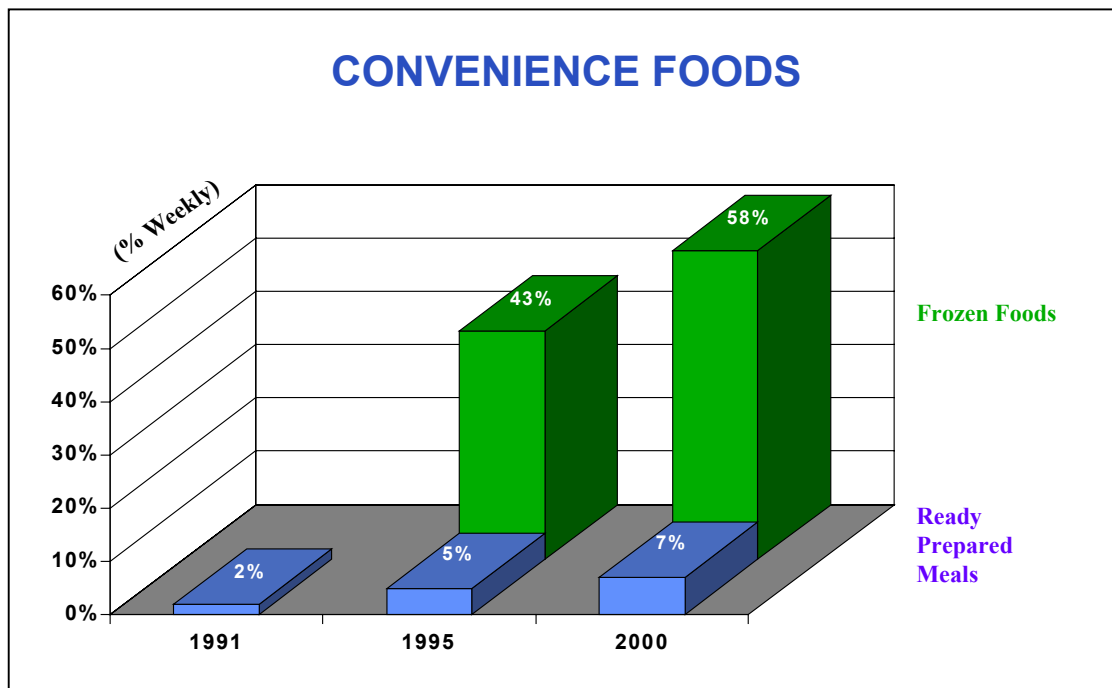
Most of us would be rightly conscious of the very significant increase over the past decade in the incidence of wine consumption. As can be seen from the following chart, the number of wine drinkers in a typical week has almost doubled in the past decade. If one takes into account the increase in volume consumed per head, it has grown even more spectacularly than that



The growth in bottled water consumption has been even more spectacular. Anybody over the age of 40 can probably remember the doubts they harboured when witnessing the launch of Ballygowan in Ireland. Nowadays nearly half the adult population drink bottled waters in a typical week. The number has almost doubled in the past *five* years. Ten years ago, it was such an unlikely prospect, that we didn't even bother to take the measurement.

1.3 “I am a bit pressed for time”

The lure of the new is evident from what we have seen so far. There is another parallel tendency that has been driven by increasing time pressure and the demise of the traditional housewife role. This has produced major growth in frozen foods and ready prepared meals



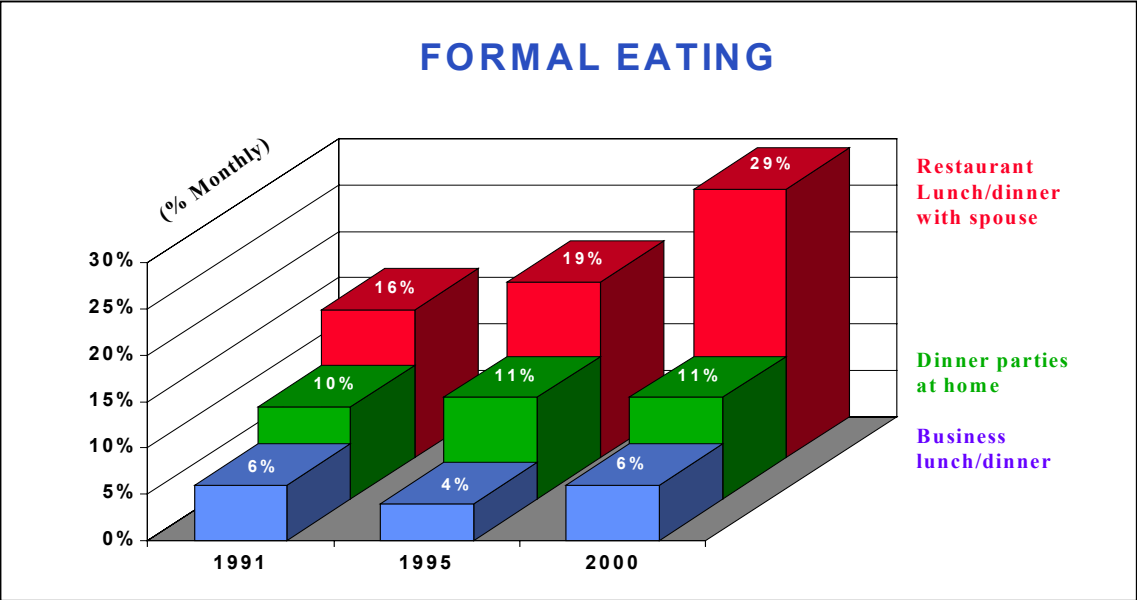
Almost 6 in 10 Irish people eat at least some frozen food item in a typical week. We do not have an equivalent measure for 1991 but the growth path since 1995 would suggest that frozen foods have doubled in popularity in the last decade.

Ready prepared meals have grown even faster, albeit from a small base. The numbers eating ready prepared meals in a typical week have trebled in the decade, to the point where 1 adult in 14 now has at least one ready prepared meal per week.

SECTION TWO
“WHERE WILL WE EAT?”

2.1 “Something a little formal”

One of the most dramatic changes in Ireland in the past ten years has been the growth in the number of restaurants. Quite a lot of this may have been fuelled by buoyancy in the tourism sector but it seems that we ourselves have really acquired the habit of eating out also.



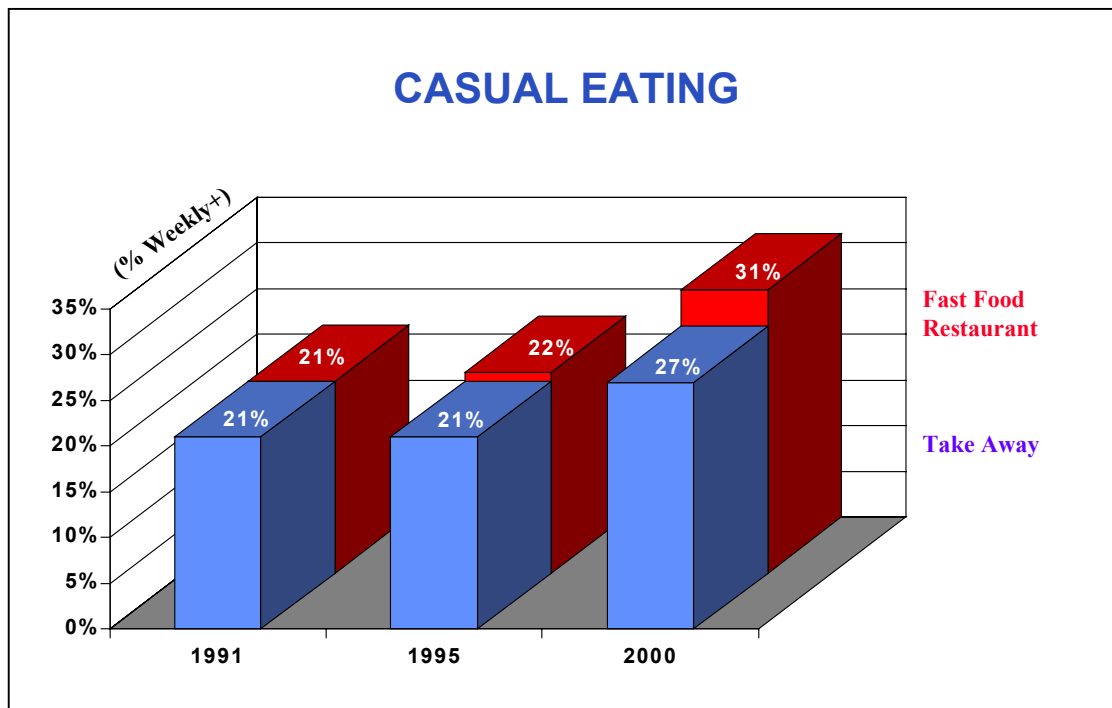
The figures here show the proportion of people eating in any of the chosen locations in a typical month (reflecting typical frequency patterns).

Interestingly, the traditional business lunch/dinner has not shown very significant change over the decade. Indeed, the evidence suggests some significant dip in this habit in the mid 1990's. The numbers having formal dinner parties at home have grown slightly but the real growth area has been in people visiting restaurants for lunch or dinner with their partners. The pattern is, by now, familiar: almost doubling in the decade.

2.2 “Perhaps something a little more casual?”

Eating in more casual fast-food/café type establishments is a longer established practice. So is the practice of buying in take-away foods.

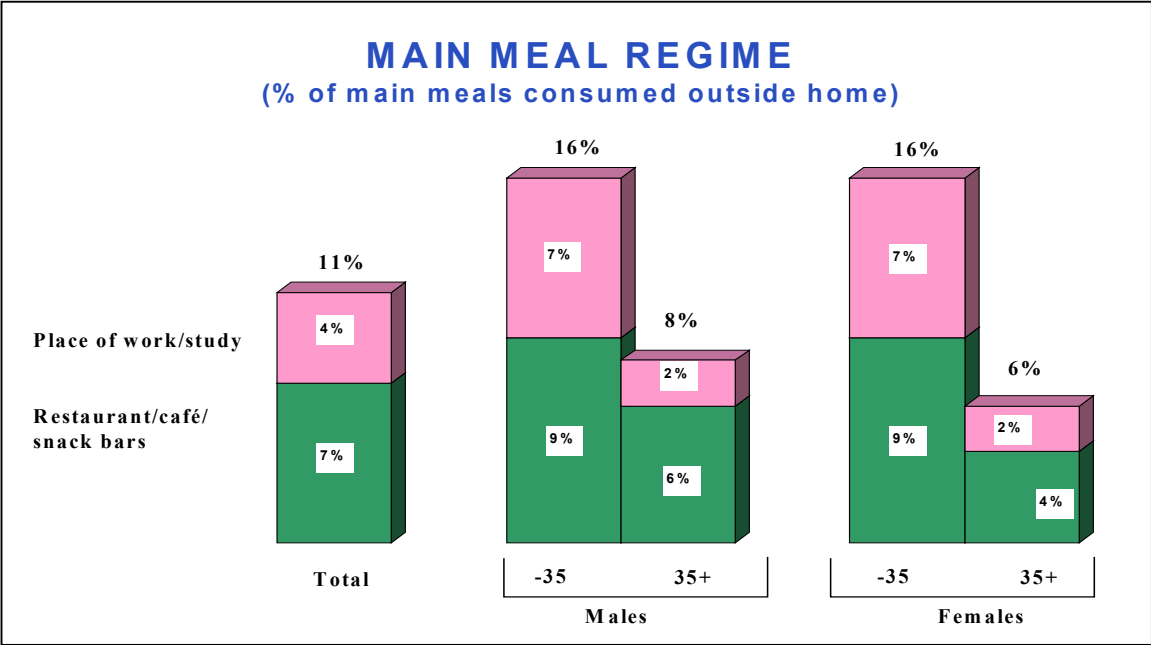
There was little change evident in the incidence of this type of eating between 1991 and 1995 but there has been a sudden lift-off in this area also, in the last five years of the decade



2.3 “Let’s Eat Out”

As part of the survey we asked respondents how many times in the past week they have had their main meal at home, at their place of work or in a restaurant or café. From this it is possible to calculate the share of all main meals consumed outside the home at present.

As is evident from the following chart, 1 in every 9 main meals are consumed outside the home.

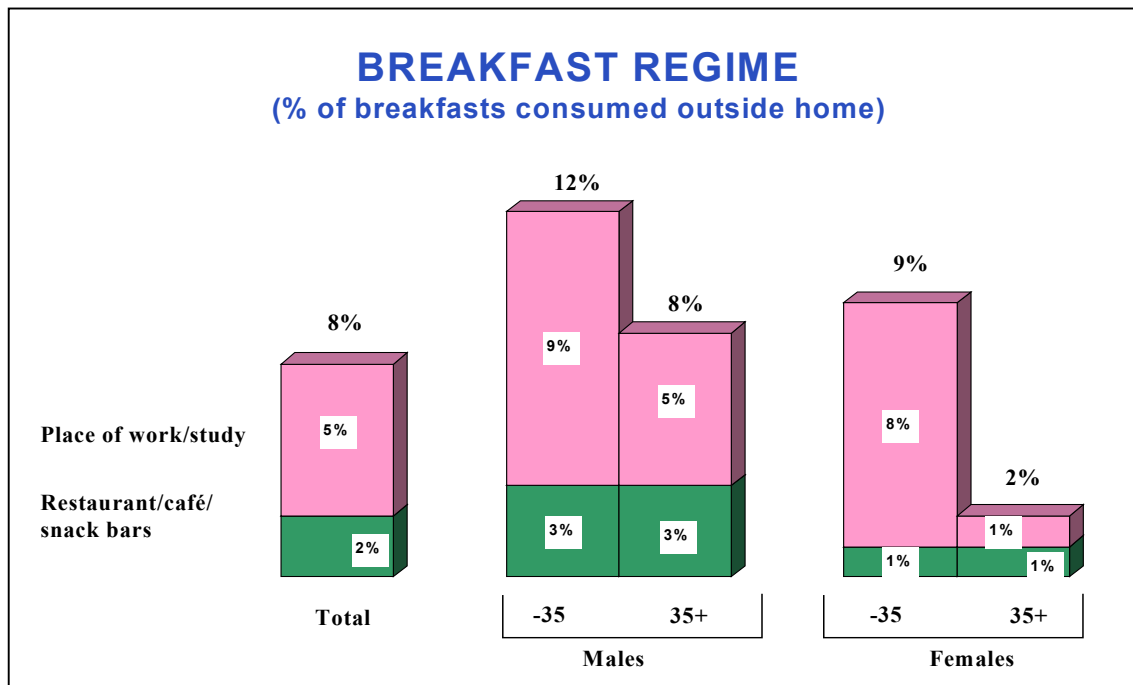


For people aged under 35 this rises to 1 in every 6 main meals consumed outside the home.

More than half of that is accounted for by the restaurant sector but a surprisingly high proportion of main meals are consumed at place of work or study. Again this is particularly true for those aged under 35 years.

2.4 Breakfast at Tiffanys

Well, not exactly Tiffanys perhaps, but 7% of all breakfasts are now reportedly consumed outside the home: something that would probably have been unheard of 10 years ago.



As was the case with main meals, the pattern is much more prevalent among young people, particularly young males. The other striking point in this analysis is a very high proportion of people who claim to have their breakfast *at their place of work or study*.

There is evidence of significant change in the typical breakfast consumed by younger people, by comparison with their older peers.

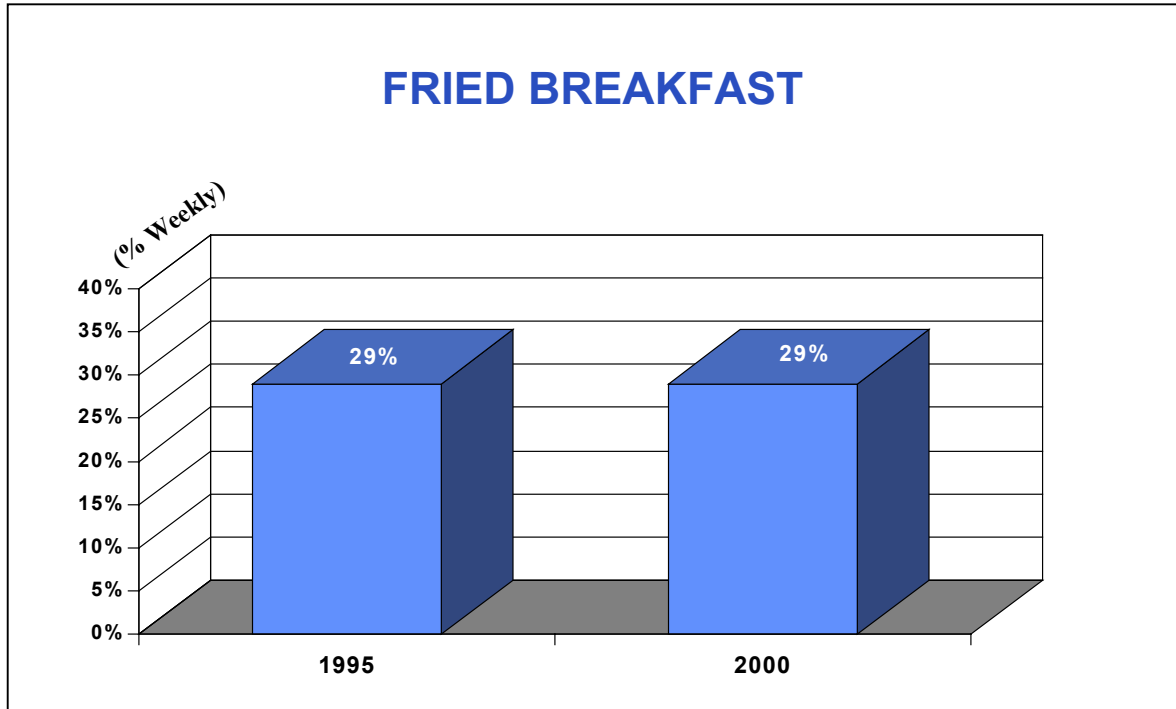
TYPICAL BREAKFAST
Key Demographic Differences

	Total	Males		Females	
		-35	35+	-35	35+
	%	%	%	%	%
Tea/coffee	81	69	90	68	90
Bread/toast	65	57	73	53	70
Cereal/muesli	46	52	40	45	48
Juice	17	22	12	18	18
Fried breakfast	9	14	15	4	3
Water	2	2	2	4	2
Yogurt	2	2	1	2	2
Other	10	9	11	9	10
None	4	5	2	10	2

The staples for breakfast are quite predictable. What is very striking however is the extent to which younger people are losing the habit of drinking coffee, and eating bread and toast. They are moving towards a greater interest in cereals, muesli and juice.

Perhaps not too surprisingly, there is a remarkable difference between men and women in their fondness for a traditional Irish fried breakfast.

The figures in the preceding table relate to a typical day's consumption patterns. Over a more extended period, even more people share a fondness for a full fried breakfast and there is little sign of any decline in popularity in recent years



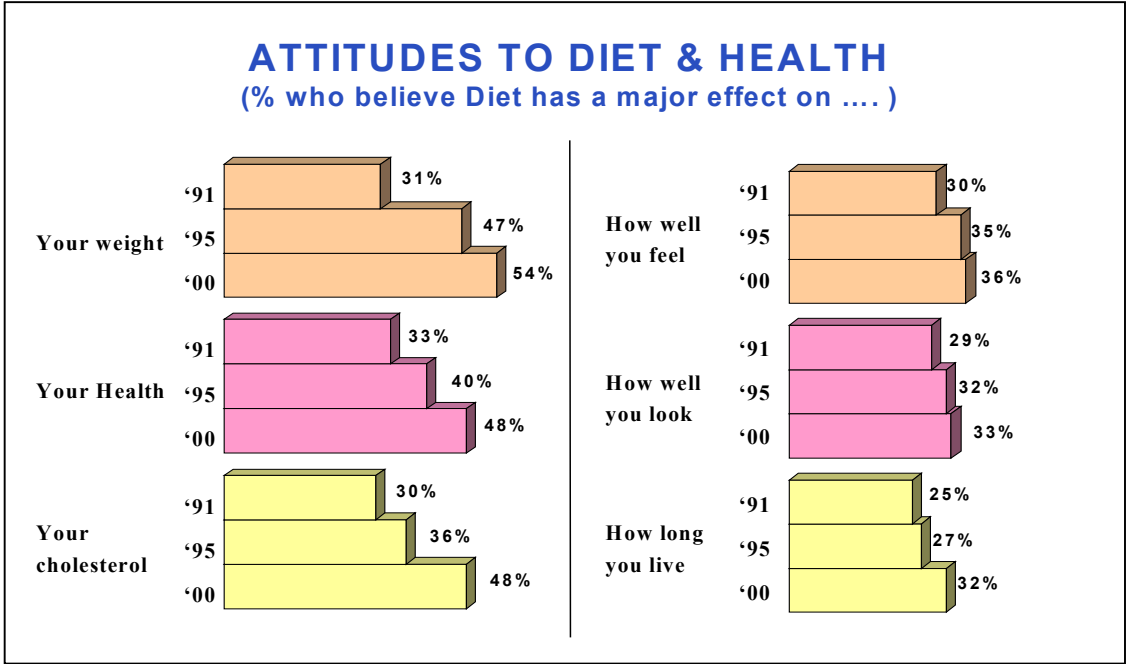
In part this may also reflect newer 'convenience' versions of the traditional fried breakfast.

SECTION THREE
“GOD I FEEL STUFFED”

3.1 “Does my bum look big in this?”

Perhaps not surprisingly in light of the evidence summarised in this report so far, there are recurring reports of Irish people becoming increasingly obese.

Certainly the results from our survey suggest that we *worry about this* quite a lot as is evident here:

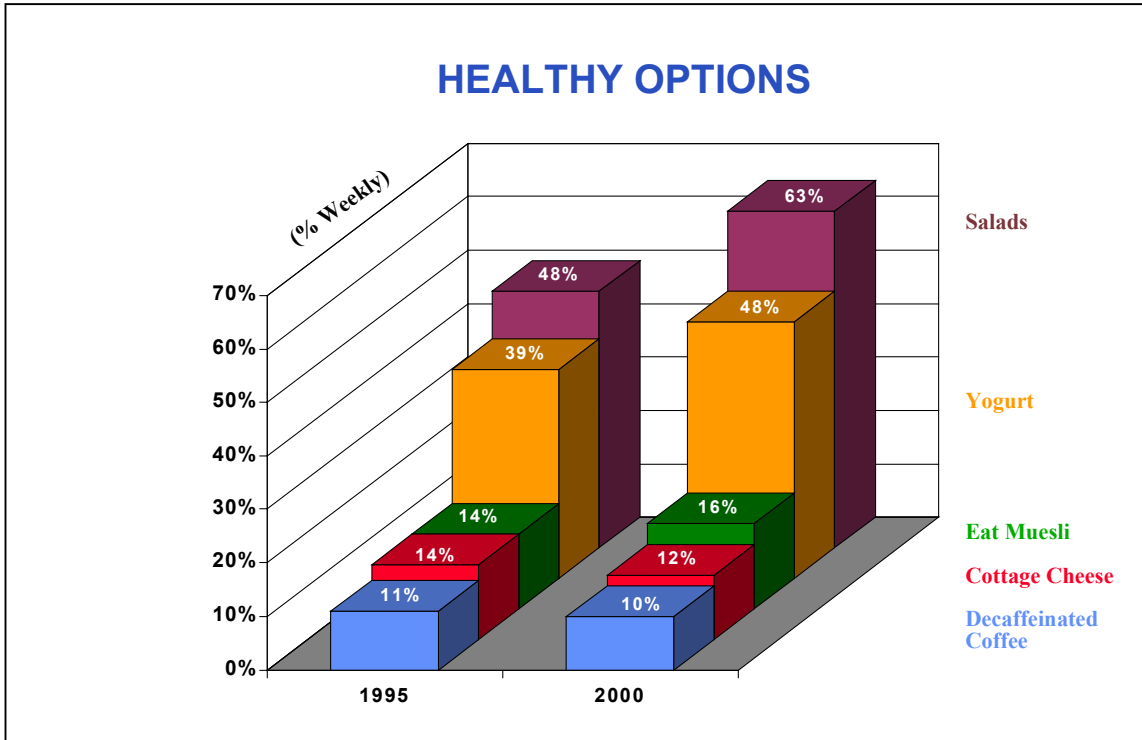


It seems clear that people are becoming increasingly convinced that diet can have a major effect on all aspects of our lifestyles.

At present we tend to focus particularly on problems of putting on weight. Perhaps as people become more convinced about the more tentative connections with feeling good, looking good and perhaps even living longer, we will mend our ways.

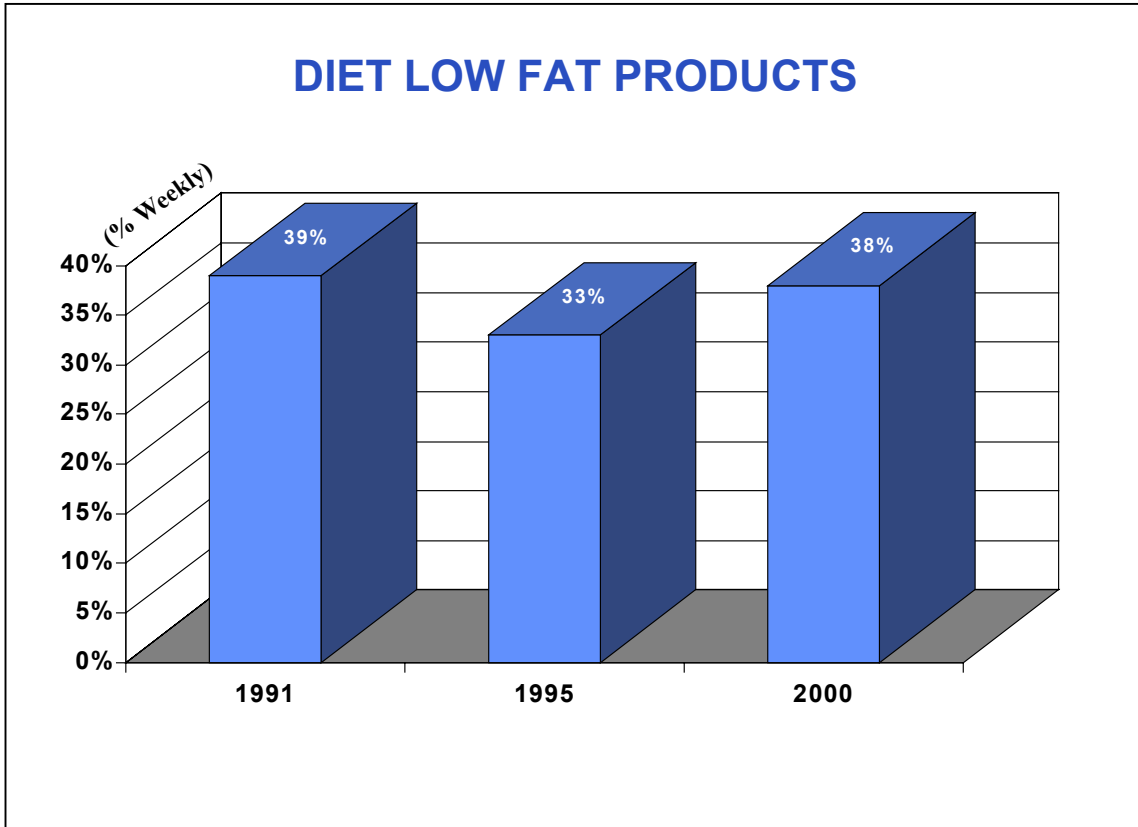
3.2 “Something light and healthy perhaps?”

There is some evidence in the survey that we are responding to the pangs of conscience about our changed eating habits. There are significant increases evident in the consumption of some of the healthier food options as is evident here:

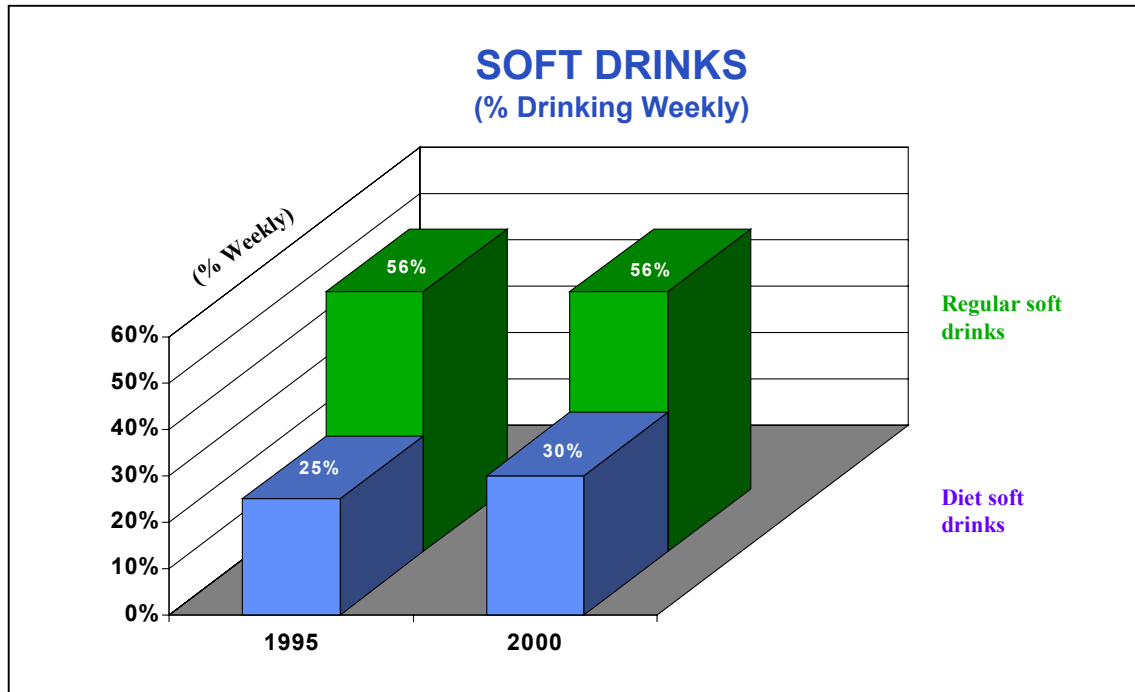


There has been very significant growth in the consumption of salads and yogurt and, to a lesser degree muesli. However cottage cheese and decaffeinated coffee seem to be fighting something of an uphill battle.

It is interesting that Irish people seem to draw a distinction between healthy foods and diet or low fat products. Our survey suggests little overall change in the popularity of diet and low fat products generally over the decade.



There are, of course, exceptions to the rule. In the soft drinks area for example, there has been little growth in the incidence of weekly consumption of regular soft drinks but a very significant increase in choosing the diet option in this particular area.

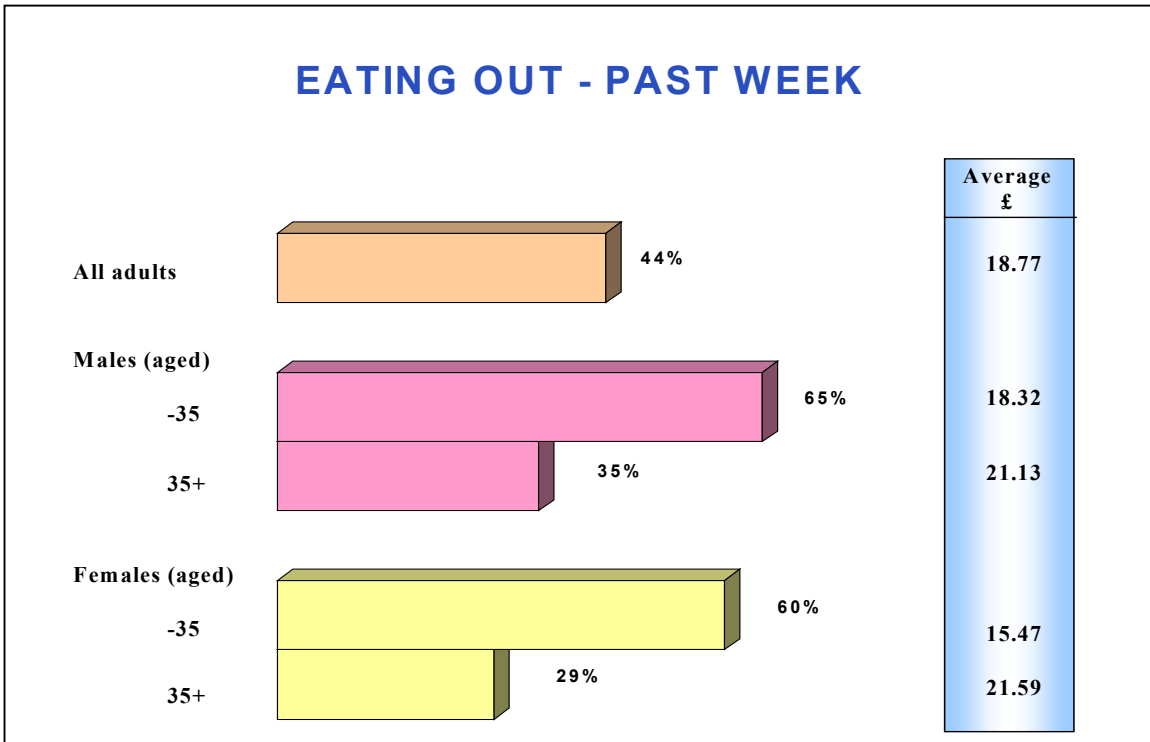


Perhaps it is the classic compromise of having a diet coke in your vodka.

SECTION FOUR
“CAN I HAVE THE BILL PLEASE”

4.1 One and a quarter billion pounds for eating out

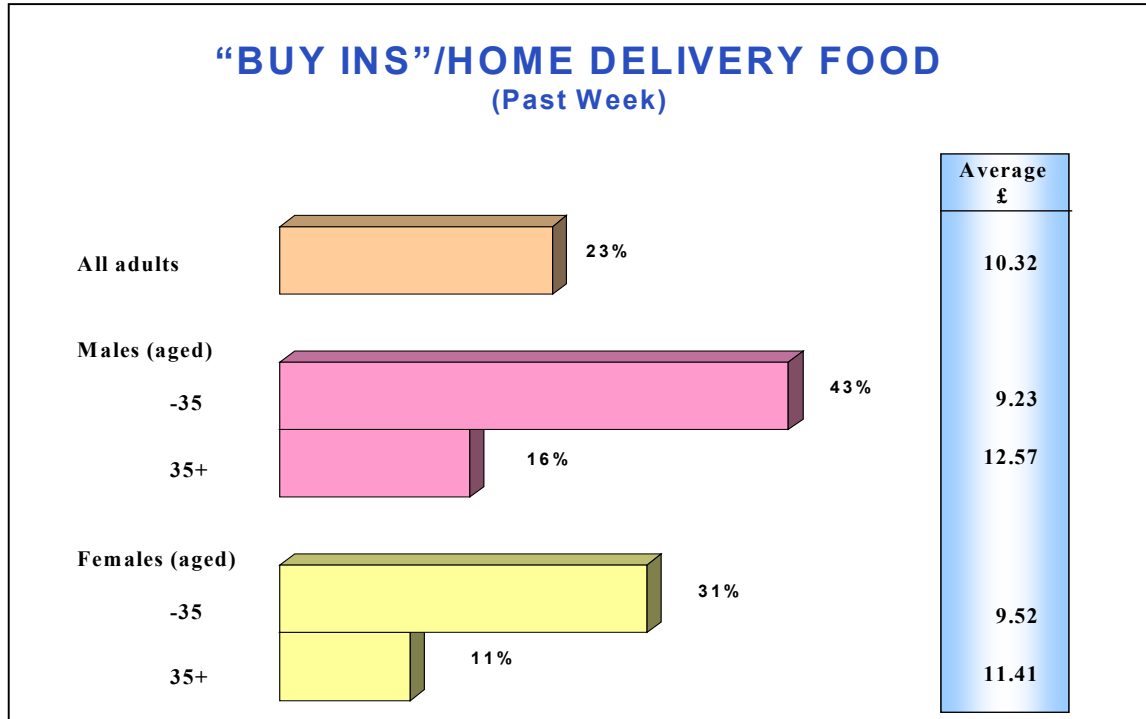
In overall terms, 44% of adults eat out at least once in a typical week. The average per capita consumption on eating out is reported at just under £19 per week. This would equate with a total bill of approximately one and a quarter billion pounds per annum.



Younger people, both male and female, are significantly more likely to eat out than their older counterparts. When over 35 year olds do eat out, they tend to spend more per head.

4.2 And another third of a billion for “buy-ins”

A quarter of adults buy some take-home or home delivery food in a typical week nowadays and they spend an average of just over £10 per head per week on this. This equates with approximately £360 million per annum.



As with eating out, the tendency to buy in food, is highest among under 35 year olds but when their older counterparts indulge they tend to spend more per head on average.