Australia’s most comprehensive study integrating consumer attitudinal trends with consumption behaviour change

ANNUAL REPORT 2015-16
Welcome to the first annual Ipsos Food CHATs report. Three years ago Ipsos recognised that a great rate of change was occurring in the food and beverage sector in Australia. Much of the conversation around change in this space has been based on our fascination and love of good food which we, as Australians, are so fortunate to be able to access in abundance.

However, despite the hype and attention, at Ipsos, we identified that there was a lack of industry-wide truth in terms of understanding exactly what consumers are doing in terms of behaviour and consumption.

Hence, Ipsos has embarked on a wonderful food adventure of our own. We want to know exactly what is going on and where the wishful thinking regarding food cooking and consumption ends, and where begins the reality facing everyday Australians in a world that is getting more and more busy, with less and less time.

This first of its kind report outlines the latest in our thinking and attitudes towards food and beverages as well as what we are actually doing day to day and week to week. It provides an interesting discussion around what is really happening in relation to sugar consumption (one of the hottest foodie topics at the moment), as well as whether we really know how to be healthy. Other key trends covered in this report are our increasing snacking culture, and the main drivers of decision-making in the moment, in the supermarket. The latest eating out facts and figures are also provided.

And there is more to come. Our next issue will deliver a deep dive into each meal occasion to reveal exactly what we are eating and how our consumption is changing. Enjoy the smorgasbord!

Gillian O’Sullivan
Managing Director | Ipsos Marketing Australia
Background and origin of Food CHATs

Food CHATs is an extension of the previous Ipsos Food-Health study which ran successfully in 2013 and 2014. The Ipsos Food-Health study focussed on delivering a social commentary on the impact of food health on our society and concentrated on understanding shifts in consumer attitudes towards food and beverages as a result of emerging health trends.

In evolving the study for 2015-16, Ipsos has decided to further meet the needs of a broader range of clients by expanding the scope to include:

● Investigation into consumers’ diet and actual consumption covering the 5Ws (who, what, when, why and where) and how consumption is changing over time
● Investigation into decision-making and what is influencing healthy food decisions in Australia
● Understanding how food is being prepared at home, what are the trends in relation to cooking
● Understanding of eating out occasions, behavioural decisions/drivers and food & beverage choices

Ipsos Food CHATs is Australia’s leading comprehensive study which integrates consumer attitudinal trends with consumption behaviour change.
Annual Report 2015-16
Point in Time Dip

- n=3,002 consumers and food decision-makers (aged 18+); representative national sample
- Quota set on gender, age and location
- Sample recruited from Ipsos Access Panel

- Fieldwork conducted between Dec 4 to 17, 2015 (2 full weeks)
- Approximately equal number of survey completes per day
- 30 mins online survey
Key Trends
2015-16
Cutting back *sugar* is definitely a priority for Australians. We want to do it, we think about it doing it, and we know we should be doing it. But actually changing consumption is more difficult. Very few Australians will actually prioritise reducing sugar in the next 12 months, they certainly don’t want to do so by replacing sugar with natural alternatives such as Stevia, nor do they want to use artificial sweeteners. Finding the sweet spot between our intentions and our consumption is still a challenge.

Australians have a simple approach to health with most aiming to eat more *natural foods, fresh and unprocessed foods*. Smaller portion sizes and healthy snacks are also a priority. Extreme diet fads are achieving exposure and the Paleo diet has achieved the most awareness overall, but trial of these diets remains low amongst typical Australians.

Although *obesity* weighs heavily on our minds, we believe that *healthiness is expensive* and *time-consuming* to achieve and beyond the means of many. Financial outlook amongst those who need healthiness the most is significantly less positive than other Australians, indicating weight issues may continue to be a problem for many Australians.

We like to *snack*. Two-thirds of us snack between meals, and we particularly like to indulge in a mid-afternoon pick-me-up. Fresh fruit is the main temptation, as well as other healthy options such as dried fruit and nuts. Jumping on the brand bandwagon by offering mini-versions of signature products could be just the ticket, as many Australians do equate smaller portions with healthiness.
Although we have plenty of good intentions in terms of shopping and eating healthily, when it comes down to it, our budget still has a higher priority in our decision-making in-store than our health aspirations. Easy decisions rule, and finding the **healthy choice is still a challenge for many** despite the introduction of the Health Star Rating system.

Private labels may be winning the war on the supermarket shelf, but it might not be the same story in our pantries at home. **Only 1 in 10 shoppers prefer private labels** which still suffer from many negative perceptions. While **private labels are about value, premium labels are about trust and little luxury** which is a combination that is hard to beat.

The **craving for new and exciting flavour experiences** is not dying down and Australians are still crazy about the latest flavour fad. Experiencing the adventurous side of food consumption is happening more in the dining out scene than in kitchens at home, and Australians are increasingly eating out at cafes and restaurants which are heating up with a range of exciting new innovations.

**Two out of every 3 Australians who prepared dinner last night, cooked completely from scratch**, mainly to create a healthy meal. But there are some segments of the population who don’t enjoy cooking as much, and some who are becoming increasingly reliant on ready meals and packaged products to feed themselves. However, we don’t seem to have lost the art of cooking just yet and while we still have families to feed, we will continue to care about our cooking to make it as healthy as possible.
Consumption
Attitudes &
Trends
Are Australians on a war against sugar?

According to the Australian Diabetes Council, Australians on average, consume more than 20 teaspoons of sugar every day, or 53 kilograms of sugar per year. The Australian Heart Foundation recommends no more than nine teaspoons per day.

1 out of every two adult Australians, strongly agree that packaged products have too much sugar in them. And yet, less than 1 out of every 10 adult Australians have actually tried to implement a ‘no sugar’ diet, and only 1 in 4 have actually tried to reduce sugar intake generally from their diet.

So although it seems that Australians are well aware of the health issues of sugar, consumption of sugar is unlikely to actually change dramatically. In fact recent research conducted by EuroMonitor International suggests that worldwide sugar consumption will continue to rise with taste winning out in the ongoing battle between ‘better for you’ and taste.

Regardless of many manufacturers taking steps to replace cane sugar with other plant-derived sweeteners such as Stevia, Food CHATs results indicate that only 3% of adult Australians intend to prioritise the use of artificial or natural sweeteners as a replacement of sugar in the next 12 months. It seems that converting intentions to action is the sweet spot we are yet to find.
Our **top 10 attitudes towards food and health are stable year on year**

Sugar remains the no. 1 ‘enemy’ (more so than salt and fat) and we have confidence that ‘made in Australia’ is safer.

1. There is too much sugar in packaged products
2. Food from Australia is safer than food from other countries
3. Farming/food production should be conducted in a manner not harmful to the environment
4. I prefer to get nutrition from natural food sources rather than taking additional supplements and vitamins
5. There is too much salt in our packaged products
6. Food production should use our country’s resources in a more environmentally sustainable way
7. Eating less fat and sugar are equally important
8. Artificially sweetened products are just as bad for you as the sugar they are replacing
9. Foods/drinks packaged in recyclable packaging
10. There is too much fat in packaged products

**HIGH PRIORITY**

- There is too much sugar in our modern diet
- Too many of our food/drink products contain preservatives
- I prefer to get nutrition from natural food sources rather than taking additional supplements and vitamins
- Food from Australia is safer than food from Asia
- Supporting Australian farmers is more important than getting cheap milk and bread
- Eating more fibre is a good way to improve one’s health
- There is too much fat in our modern diet
- Food production should use our country’s resources in a more environmentally sustainable way
- Artificially sweetened products are just as bad for you as the sugar they are replacing
- Eating less fat and sugar are equally important

Source: AB1 (TOP 10 SHOWN)
Base: total sample (n=3002)
Health continues to be the high priority area for 2016 and Australians want the Government to do more about it. After a number of food safety scares last year, food origin and safety is a clear priority and sustainability and recycling continues to gain traction. Australian consumers are also seeking inspiration and ideas, while being limited by budget. Food is a pleasure and consumers are looking for diversity, but taste is a lower priority than healthiness.

### Health
- Sugar in packaged products
- Prefer natural food sources not supplements/vitamins
- Salt in packaged products
- Eating less fat and sugar equally important
- Artificial sweeteners are just as bad as sugar
- Fat in packaged products
- Eating whole grains good for health
- Food/drinks should be GMO free
- Government needs to do more to encourage healthy lifestyles
- Preservatives in food/drinks
- Protein is good for health
- Food/drinks should be GMO free
- Knowing origin of ingredients and products is important to me

### Safety & Ethics
- Food from Australia is safer than food from other countries
- Farming/food production should be conducted in a manner not harmful to the environment
- Food production should use our country’s resources in a more environmentally sustainable way
- Foods/drinks packaged in recyclable packaging
- Fortified foods/drinks are good for you
- Organic food is really worth the health benefits
- A vegetarian diet is a healthier diet

### Inspire
- Food is one of life’s pleasures that I don’t want to compromise on
- I want more exciting/diverse/inspiring food products
- When it comes to my food/drink choices my main priority is sticking to a main budget
- Limiting carbohydrates is better for your health
- It is hard to get information you can trust on making better food and beverage choices
- I believe we should consume more superfoods
- I prefer to buy local/direct from farmers.
- I really worry about treatment of animals in farming

### Value
- Taste is more important than how healthy it is
- As long as I enjoy my food, I don’t worry about what I eat
- Probiotics/antioxidants should be added to food/drinks
- Low calorie & fat options lack the nutrients I am looking for
- Fortified foods/drinks are good for you
- Organic food is really worth the health benefits
- A vegetarian diet is a healthier diet
- It’s worth eating prepared food from supermarkets or take-away because it saves me time

### Convenience
- When it comes to my food/drink choices my main priority is sticking to a main budget
- Limiting carbohydrates is better for your health
- It is hard to get information you can trust on making better food and beverage choices
- I believe we should consume more superfoods

### LOW PRIORITY
- Source: AB1
  Base: total sample (n=3002)
Food priorities for the next 12 months
There is a stronger focus on eating meals prepared at home with fresh ingredients than eating pre-prepared fresh meals from supermarket/deli.
Increasing fibre intake is a higher priority than increasing protein intake.
Eating more whole grains and raw food are of medium priority.

- Eating more fresh fruit and vegetables
- Smaller portion sizes
- Reducing sugar intake generally from food
- Cutting down on fat generally
- Eating healthier snacks (e.g. fresh fruit, nuts, seeds)
- Cutting down on confectionary like chocolate bars and lollies
- Eating more fish (fresh, frozen or canned)
- Reducing salt intake
- Eating more meals prepared at home with fresh ingredients
- Cutting down on foods like potato chips
- Increasing fibre intake
- Reducing sugar intake from beverages
- Avoiding preservatives, colouring and artificial ingredients in food/beverages
- Eating more whole grains
- Eating breakfast more regularly
- Reducing saturated fat intake (from fried foods, cakes, pastries and snacks)
- Reducing carbohydrate intake
- Eating more raw food like raw seeds, nuts or vegetables
- Less eating out (restaurants, cafes or take-away)
- Eating more superfoods
- Decrease alcohol intake

- Reducing saturated fat intake (by trimming meat)
- Increasing vitamin D intake
- Reducing intake of caffeine
- Eating more red meat like beef or lamb
- Increasing protein intake (any source)
- Reducing saturated fat intake (from whole milk, cheese or lamb)
- Taking vitamin tablets and/or supplements more regularly
- Eating more dairy products like milk, cheese or yoghurt
- Eating healthier packaged snacks (e.g. health bars, muesli bars, protein bars)
- Eating less red meat like beef or lamb
- Reducing intake of gluten
- Increasing calcium intake from foods/drinks enriched with calcium
- Increasing nutrition with added ingredients (e.g. probiotics, fibre/omega-3)
- Eating less dairy products like milk, cheese or yoghurt
- Replacing meat with vegetarian protein
- Increasing unsaturated fat intake (vegetable oil like olive or canola, seeds & nuts)
- Replacing cane sugar with artificial sweeteners
- Replacing cane sugar with natural sweeteners
- Eating more pre-prepared fresh meals from supermarket or deli
- Eating more organic/bio-dynamic food or drinks

Source: AB4 (What are your food priorities for the next 12 months) | % selected in top 5
Base: total sample (n=3002)
What we eat
When we eat
**Food and beverages (macro categories) consumed yesterday morning**

Bread, fruit, cheeses and eggs are popular morning food items. Hot beverage and water have significantly higher incidence than the other beverages.

**PRE-BREAKFAST SNACK**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bread</td>
<td>50%</td>
</tr>
<tr>
<td>Fruit - Fresh</td>
<td>42%</td>
</tr>
<tr>
<td>Cheeses</td>
<td>37%</td>
</tr>
<tr>
<td>Baked Goods and Pastries</td>
<td>34%</td>
</tr>
<tr>
<td>Eggs (e.g. eggs/omelette/frittata)</td>
<td>32%</td>
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**BREAKFAST FOOD**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cereals and Oats</td>
<td>54%</td>
</tr>
<tr>
<td>Bread</td>
<td>50%</td>
</tr>
<tr>
<td>Fruit - Fresh</td>
<td>28%</td>
</tr>
<tr>
<td>Milks and Creams</td>
<td>24%</td>
</tr>
<tr>
<td>Eggs (e.g. eggs/omelette/frittata)</td>
<td>23%</td>
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</tbody>
</table>

**MORNING SNACK**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fruit - Fresh</td>
<td>33%</td>
</tr>
<tr>
<td>Baked Goods and Pastries</td>
<td>18%</td>
</tr>
<tr>
<td>Bread</td>
<td>17%</td>
</tr>
<tr>
<td>Cheeses</td>
<td>12%</td>
</tr>
<tr>
<td>Processed Snack foods - Sweet (e.g. biscuits/bars)</td>
<td>11%</td>
</tr>
</tbody>
</table>

**PRE-BREAKFAST BEVERAGE**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Hot Drinks (tea/coffee/hot chocolate)</td>
<td>77%</td>
</tr>
<tr>
<td>Water (still, sparkling, flavoured)</td>
<td>38%</td>
</tr>
<tr>
<td>Soft Drinks (carbonated)</td>
<td>18%</td>
</tr>
<tr>
<td>Milk (animal and plant sources)</td>
<td>15%</td>
</tr>
<tr>
<td>Sweetened Drinks (cordial/juices/iced tea)</td>
<td>10%</td>
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**BREAKFAST BEVERAGE**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Hot Drinks (tea/coffee/hot chocolate)</td>
<td>75%</td>
</tr>
<tr>
<td>Water (still, sparkling, flavoured)</td>
<td>25%</td>
</tr>
<tr>
<td>Milk (animal and plant sources)</td>
<td>14%</td>
</tr>
<tr>
<td>Sweetened Drinks (cordial/juices/iced tea)</td>
<td>11%</td>
</tr>
<tr>
<td>Soft Drinks (carbonated)</td>
<td>10%</td>
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**MORNING BEVERAGE**

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
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</thead>
<tbody>
<tr>
<td>Hot Drinks (tea/coffee/hot chocolate)</td>
<td>72%</td>
</tr>
<tr>
<td>Water (still, sparkling, flavoured)</td>
<td>25%</td>
</tr>
<tr>
<td>Milk (animal and plant sources)</td>
<td>8%</td>
</tr>
<tr>
<td>Soft Drinks (carbonated non-alcoholic drinks)</td>
<td>8%</td>
</tr>
<tr>
<td>Sweetened Drinks (cordial/juices/iced tea)</td>
<td>5%</td>
</tr>
<tr>
<td>Flavoured milk</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: C1b (Food products consumed throughout the day) (TOP 5 SHOWN BY DAY-PART) Base: total sample (n=3002)
Food and beverages (macro categories) consumed yesterday afternoon/during the day

Bread, fresh fruit & veg, cheese, meat, baked goods/pastries, nuts, seeds and dried fruit and confectionery are primarily consumed during the day. Soft drinks, hot drinks and water are regularly consumed.

<table>
<thead>
<tr>
<th>LUNCH FOOD</th>
<th>%</th>
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<tbody>
<tr>
<td>Bread</td>
<td>44%</td>
</tr>
<tr>
<td>Vegetables - Fresh</td>
<td>24%</td>
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<tr>
<td>Cheeses</td>
<td>21%</td>
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<tr>
<td>Meat (e.g. beef/pork/lamb)</td>
<td>18%</td>
</tr>
<tr>
<td>Fruit - Fresh</td>
<td>16%</td>
</tr>
<tr>
<td>Processed meat (e.g. salami/ham/bacon)</td>
<td>11%</td>
</tr>
<tr>
<td>Spreads</td>
<td>10%</td>
</tr>
<tr>
<td>Eggs (e.g. eggs/omelette/frittata)</td>
<td>9%</td>
</tr>
<tr>
<td>Poultry (e.g. chicken/turkey/duck)</td>
<td>9%</td>
</tr>
<tr>
<td>Burger</td>
<td>7%</td>
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<table>
<thead>
<tr>
<th>AFTERNOON SNACK</th>
<th>%</th>
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<tbody>
<tr>
<td>Fruit - Fresh</td>
<td>23%</td>
</tr>
<tr>
<td>Baked Goods and Pastries</td>
<td>14%</td>
</tr>
<tr>
<td>Nuts, Seeds and Dried Fruit</td>
<td>14%</td>
</tr>
<tr>
<td>Confectionery</td>
<td>11%</td>
</tr>
<tr>
<td>Cheeses</td>
<td>10%</td>
</tr>
<tr>
<td>Processed Snack foods - Savoury (e.g. chips/crackers/popcorn)</td>
<td>10%</td>
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<tr>
<td>Processed Snack foods - Sweet (e.g. biscuits/bars)</td>
<td>10%</td>
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<table>
<thead>
<tr>
<th>SNACK THROUGH THE DAY</th>
<th>%</th>
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<tbody>
<tr>
<td>Fruit - Fresh</td>
<td>31%</td>
</tr>
<tr>
<td>Confectionery</td>
<td>25%</td>
</tr>
<tr>
<td>Nuts, Seeds and Dried Fruit</td>
<td>16%</td>
</tr>
<tr>
<td>Baked Goods and Pastries</td>
<td>12%</td>
</tr>
<tr>
<td>Processed Snack foods - Savoury (e.g. chips/crackers/popcorn)</td>
<td>12%</td>
</tr>
<tr>
<td>Cheeses</td>
<td>11%</td>
</tr>
<tr>
<td>Bread</td>
<td>11%</td>
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<table>
<thead>
<tr>
<th>LUNCH BEVERAGE</th>
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</thead>
<tbody>
<tr>
<td>Hot Drinks (tea/coffee/hot chocolate)</td>
<td>37%</td>
</tr>
<tr>
<td>Water (still, sparkling, flavoured)</td>
<td>34%</td>
</tr>
<tr>
<td>Soft Drinks (carbonated)</td>
<td>24%</td>
</tr>
<tr>
<td>Sweetened Drinks (cordial/juices/iced tea)</td>
<td>8%</td>
</tr>
<tr>
<td>Milk (animal and plant sources)</td>
<td>4%</td>
</tr>
<tr>
<td>Flavoured milk</td>
<td>4%</td>
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<td>14%</td>
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<tr>
<td>Sweetened Drinks (cordial/juices/iced tea)</td>
<td>5%</td>
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<table>
<thead>
<tr>
<th>BEVERAGE THROUGH THE DAY</th>
<th>%</th>
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<tbody>
<tr>
<td>Water (still, sparkling, flavoured)</td>
<td>51%</td>
</tr>
<tr>
<td>Hot Drinks (tea/coffee/hot chocolate)</td>
<td>33%</td>
</tr>
<tr>
<td>Soft Drinks (carbonated)</td>
<td>21%</td>
</tr>
<tr>
<td>Sweetened Drinks (cordial/juices/iced tea)</td>
<td>9%</td>
</tr>
<tr>
<td>Milk (animal and plant sources)</td>
<td>7%</td>
</tr>
</tbody>
</table>

Source: C1b (Food products consumed throughout the day) (TOP 5 SHOWN BY DAY-PART) Base: total sample (n=3002)
Food and beverages (macro categories) consumed yesterday evening

Fresh vegetables, meat and poultry consumption dominate for the evening meal. Rice, noodles and pasta are also consumed for dinner.

**DINNER FOOD**
- Vegetables - Fresh 40%
- Meat (e.g. beef/pork/lamb) 35%
- Poultry (e.g. chicken/turkey/duck) 15%
- Bread 14%
- Rice and noodles 11%
- Pasta (e.g. penne/fettuccine/spaghetti) 11%
- Vegetables - Frozen 10%
- Cheeses 9%
- International foods - Asian Cuisine 9%

**DESSERT AS PART OF DINNER**
- Desserts 27%
- Fruit - Fresh 20%
- Yoghurts and Custard 19%
- Confectionery 9%
- Baked Goods and Pastries 8%

**EVENING BEVERAGE**
- Hot Drinks (tea/coffee/hot chocolate) 47%
- Water (still, sparkling, flavoured) 23%
- Soft Drinks (carbonated) 12%
- Wine 11%
- Beer 9%
- Milk (animal and plant sources) 6%
- Sweetened Drinks (cordial/ juices/ iced tea) 5%
- Spirits/Liqueur 4%

**EVENING SNACK (NOT DESSERT)**
- Confectionery 22%
- Fruit - Fresh 14%
- Processed Snack foods - Savoury (e.g. chips/crackers/popcorn) 12%
- Baked Goods and Pastries 11%
- Cheeses 11%
- Bread 10%
- Nuts, Seeds and Dried Fruit 10%

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Source: C1b (Food products consumed throughout the day) (TOP 5 SHOWN BY DAY-PART) Base: total sample (n=3002)
A Snacking Culture

Dream a little....

Snacking is an occasion in its own right with 2 out of every 3 Australians snacking between meals. The afternoon snack is the most prevalent with more than 60% of snackers enjoying a mid-afternoon pick-me-up. Fresh fruit is a main snacking item during the day, particularly for the mid-morning snack, but we are also indulging in baked goodies and pastries, bread, nuts, seed, dried fruit, cheeses and confectionary. Our favourite after dinner snack is a sweet treat with most of us favouring confectionery at this time of the day.

Our obvious enjoyment of snacking appears to be at odds with our increasing concern with health, and this tension is driving an increase in demand for, and consumption of, health snack foods. According to business information analysts at IBISWorld Australia health snack food is growing at an annualised rate of 3%.

To capitalise on this real and significant growth trend, many brands are jumping onto the snack bandwagon, producing mini-versions or snack portions of their signature products, hoping that consumers will equate smaller portion size with increased healthiness. Other brands are focusing on the promotion of natural ingredients in the hope to woo our snack-hungry population. It seems the growth in this space will prevail as Australians continue to find mid-meal snacks irresistible.
Shopping
What influences food purchase decisions?

Taste is the leading consideration when purchasing groceries followed by price and promotional activities. Nutritional info is more influential than health star rating. Provenance is a key factor for 2 in 5 consumers. A third of consumers do not consider pack design or materials when making a purchase decision.

Taste and price are the primary considerations.
Who is buying private label brands?

Of those who have a preference, it is 3-1 in favour of premium brands. That said there are 55% of consumers who don’t care whether the grocery they buy are private label or premium branded.

**Who is buying private label brands?**

Of those who have a preference, it is 3-1 in favour of premium brands. That said there are 55% of consumers who don’t care whether the grocery they buy are private label or premium branded.

**PREFER PRIVATE LABEL**
- 30-39 year olds (14%)
- Functional Cooks (14%)
- Victorian/Tasmanian (15%)
- Young families (15%)
- Have postgraduate degree (15%)

**PREFER PREMIUM BRANDS**
- Older families (36%)
- High Income $100K+ (38%)
- African/Asian background (37%)

**Average basket (includes specials)**
- **Aldi private label** $87.57
- **Coles private label** $113.75
- **Woolworths private label** $118.56
- **Leading brands** $162.56

Source: SPB8 (What is your brand preference?)
Base: total sample (n=2429)
Meal preparation
What we cook
Self rated cooking skill levels

Most Australians perceived themselves to possess a moderate level of cooking ability.

- **9%** Advanced to very advanced skills – I have a strong set of cooking skills
- **48%** Moderate to advanced cooking skills – I can cook quite a broad range of meals using different methods
- **37%** Limited to moderate cooking skills – I cook basic, simple meals
- **5%** Limited cooking skills – I don’t really cook, but I can assemble meals

Source: MP16 (What best describes your level of cooking skills?)
Base: total sample (n=1512)
Are the lunch/dinner prepared yesterday...

9 out of 10 meals prepared yesterday is home made; two thirds completely from scratch.

- Completely homemade / made from scratch: 61% (66% for Dinner, 61% for Lunch)
- Partially homemade: 27% (28% for Dinner, 27% for Lunch)
- Fully cooked/ready to heat and eat (not homemade): 6% (5% for Dinner, 6% for Lunch)
- Ready to eat/no heating or cooking required (not homemade): 6% (6% for Dinner, 1% for Lunch)

Source: MPS (What type of food do you like to prepare?)
Base: lunch (n=591) / dinner (n=921)

76% aged 60+ cooked their dinner yesterday from scratch vs. 51% for those aged 18-29 YO.

Increases to 39% amongst those aged 18-29 YO.
Why do Australians cook the way they do?

‘From scratch’ cooks are seeking healthier, cheaper options for their meals while those eating ready made meals like that they are easier and quicker to prepare. The cooks who partially made their meal from scratch are most likely to want to minimise time in the kitchen.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Completely homemade/ made from scratch</th>
<th>Partially Homemade</th>
<th>Fully cooked/ready to heat and eat (not homemade)</th>
<th>Ready to eat/ no heating required (not homemade)</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is healthier</td>
<td>51%</td>
<td>26%</td>
<td>18%</td>
<td>7%</td>
</tr>
<tr>
<td>It is quicker</td>
<td>20%</td>
<td>40%</td>
<td>39%</td>
<td>38%</td>
</tr>
<tr>
<td>It is cheaper</td>
<td>32%</td>
<td>22%</td>
<td>12%</td>
<td>9%</td>
</tr>
<tr>
<td>It is easier</td>
<td>25%</td>
<td>37%</td>
<td>44%</td>
<td>20%</td>
</tr>
<tr>
<td>To spend less time in the kitchen</td>
<td>9%</td>
<td>23%</td>
<td>16%</td>
<td>11%</td>
</tr>
<tr>
<td>I couldn’t think of anything else to cook</td>
<td>10%</td>
<td>10%</td>
<td>8%</td>
<td>4%</td>
</tr>
<tr>
<td>For variety / something different</td>
<td>16%</td>
<td>15%</td>
<td>13%</td>
<td>2%</td>
</tr>
<tr>
<td>It is the only way I know how to cook</td>
<td>15%</td>
<td>9%</td>
<td>4%</td>
<td>2%</td>
</tr>
</tbody>
</table>

Source: MPS (What type of food do you like to prepare?) MP6 (Why do you cook in this way?)
Base: meal preparers (n=971 / 419 / 77 / 45)
Ingredients used yesterday for meal preparation

Australians like to prepare their meals using fresh ingredients. While leftovers are more likely to feature at lunchtime, frozen ingredients are more likely used for dinner preparation. Australians are more likely to have leftovers or frozen meals for lunch on Mondays.

Source: MP7 (Which ingredients did you use during your meal preparation?)
Base: lunch (n=591) / dinner (n=921)
Eating out
Venues for eating out yesterday

1 in 3 Australian ate out yesterday, most notably at a restaurant/café, fast food/snack chain, food court or pub/club/wine bar.

WHERE?

- At a restaurant/café: 12%
- At a fast food or snack food chain: 7%
- At a club/pub/wine bar/tavern: 5%
- At a food court: 6%
- At a local food outlet (e.g. fish & chips, hamburger or kebab store): 4%
- From a bakery/bread shop: 3%
- At a market / farmer markets / local street markets: 2%
- From a food kiosk/food truck (not at market): 1%

Source: C19 (Did you consume and F&B out of home yesterday)
Base: total sample (n=3002)
Average no. of occasions eating out at...

Australians eat out at fast food/snack chains and restaurants/cafés once a week; less often for pubs/clubs. Over a 12 month period, 18-29YOs reported an increase in visitation across the 3 venues.

**FAST FOOD/SNACK CHAINS**

- **Frequency of visitation (over the last 12 months):**
  - 4.6x (per month)
  - 20% NEVER

  - 6% increased a lot/little
  - 21% increased a little
  - 49% stayed about the same
  - 15% decreased a little
  - 9% decreased a lot

  - ↑ Aged 18-29 YO – 52% increased a lot/little
  - ↑ Young families – 35% (ditto)

**RESTAURANT/CAFÉ**

- **Frequency of visitation (over the last 12 months):**
  - 4.2x (per month)
  - 8% NEVER

  - 7% increased a lot/little
  - 24% increased a little
  - 52% stayed about the same
  - 12% decreased a little
  - 6% decreased a lot

  - ↑ Aged 18-29 YO – 53% increased a lot/little

**PUB/CLUB/BAR/TAVERN**

- **Frequency of visitation (over the last 12 months):**
  - 2.4x (per month)
  - 24% NEVER

  - 4% increased a lot/little
  - 17% increased a little
  - 57% stayed about the same
  - 13% decreased a little
  - 9% decreased a lot

  - ↑ Aged 18-29 YO – 41% increased a lot/little

Source: E04 (Approximately how often per month would you eat out at...) | E05a/b/c (Would you say that your frequency of visit to ... has increased, decreased or stayed the same over the last 12 months?)

Base: All eating out yesterday (n=660)
Information about the sample
Sample profile

GENDER

AGE

STATE

EMPLOYMENT

LIFESTAGE

COUNTRY OF BIRTH

PERSONAL INCOME

Source: SQ1, SQ2, SQ3a, D1, D2, D4 & D5
Base: total sample (n=3002)
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For further information on FOOD CHATS, please contact:

KATHY BENSON
Strategy & Research Director
Kathy.Benson@ipsos.com
+61 7 3016 7662

Kathy brings to the table advanced research capability with strong strategy skills specialising in brand development research, consumer sentiment and segmentation research.

EILEEN FONG
Director
Eileen.Fong@ipsos.com
+61 2 9900 5143

Eileen has a keen interest in understanding human behaviour and specialises in innovation/new product development research across many food and beverage categories.