WAITROSE
& PARTNERS

FOOD
AND
DRINK
REPORT
2018–19

THE ERA OF THE
MINDFUL CONSUMER
THE MINDFUL CONSUMER

Our wellbeing and that of our environment have a huge influence on the way we shop today. It’s redefining how we live, according to the latest research from Waitrose & Partners.

A CONSUMER REVOLUTION is quietly taking place. You won’t see people shouting about it in the shopping aisles, but it’s happening nonetheless. As we become increasingly mindful of our own health, the wellbeing of our family and that of the planet, we’re reshaping how we shop, cook and eat. Welcome to the era of the mindful consumer.

The driving force behind this movement, as our research uncovered, is a desire to look after ourselves and our environment. Just how much this consciousness is taking hold was borne out by the incredible reaction to the final episode of BBC One’s Blue Planet II, a rallying call to tackle the plastic waste in our oceans. The mindful movement marks a subtle shift in how we live, based on the acknowledgement that our natural resources are precious.

We also worry about our personal resources, such as time – or rather the lack of it. Nearly 70% of us feel that the pressures of modern life have increased over the past five years. Close to half are working longer hours, and around four in 10 regularly check work emails in personal time. We manage the relentless pace by taking care of ourselves as best we can, eating more nutritious, less heavy foods, and making an effort to stay hydrated.

At Waitrose & Partners, we’re helping customers in every way we can. We’re facilitating the move towards healthier, lighter evening meals with a range of nutritious and healthy alternatives. We’re also supporting the ever-growing popularity of brunch, sales of sourdough loaves have soared by a third.

This year’s social media headliners

Among the most-liked photos from Waitrose & Partners’ Instagram feed were…

1. Fluffy jacket potatoes
2. Sticky garlic and chilli prawns
3. Strawberry and rose layer cake

THE FACTS & FIGURES

Waitrose & Partners carried out extensive research into the top food and drink trends in 2018.

We conducted OnePoll consumer research on a wide range of topics with 2,000 people of all ages – not exclusively Waitrose & Partners customers. This was supported by focus groups in which people were asked in-depth questions about their shopping, cooking and eating habits. Some of the focus group participants share their views with us in this report.

Our research supports insights from our own food, drink and retail partners. It is backed up with sales data from millions of purchases throughout the year.

ALL FIGURES ARE COMPARED WITH THE SAME PERIOD THE PREVIOUS YEAR, UNLESS OTHERWISE STATED.

FOR FURTHER INFORMATION, PLEASE CONTACT THE WAITROSE & PARTNERS PRESS OFFICE ON 01344 825 080.
THE WAR ON PLASTIC

IT WAS THE SCENE that changed everything: altruistic parents unwittingly feeding their chick in plastic in the final episode of BBC One’s Blue Planet II. Our research found that 88% of those who watched the programme have altered their behaviour as a result. Since the episode aired at the end of 2017, our customer services team has seen an 800% increase in questions about plastic. A new era of environmentalism has taken hold, and attitudes towards single-use bags, disposable plastic straws and packaging will never be the same.

Our research revealed that more than 60% of people use reusable water bottles more often than they did in 2017 – and this figure rose to over 70% among those aged 18-24. From the Houses of Parliament, which announced a ban on single-use plastics in May, to Love Island – the TV show’s legendary bottles have become commonplace. Sales of Waitrose & Partners bottles in August were 16-fold on last year.

‘We’ve seen a real turning point in attitudes towards plastics and packaging waste. There’s been a significant and genuine change in behaviour.’

TRENDS & INSIGHTS

WE RECEIVED 30,000 QUESTIONS AND POSTS ABOUT PLASTIC ON @WAITROSE TWITTER IN THE SIX MONTHS AFTER THE FINAL EPISODE OF BLUE PLANET II – A 16-FOLD INCREASE ON LAST YEAR.

Quotes and stats

76% OF US HAVE CHANGED HOW WE USE PLASTICS AFTER VIEWING THE FINAL EPISODE OF BLUE PLANET

‘We’ve seen a real shift in consumer behaviour,’ says Natalie Mitchel, Head of Brand Development & Product Innovation at Waitrose & Partners. ‘Previously, customers wanted to know that we were taking care of things, but now they get actively involved.’

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‘Reusable water bottles are everywhere – you see people with them in meetings, on trains or walking down the street. Whether it’s about caring for the environment or staying hydrated, the result is the same. It feels good and does you good.’

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THE NEW VEGETARIAN REVOLUTION

ONE IN EIGHT BRITS – or almost 13% of the population – is now vegetarian or vegan, with a further 22% identifying as ‘flexitarian’, according to our research. This means that a third of us now have meat-free or meat-reduced diets. In many cases, these are lifestyle choices that have been adopted over the past five years, reflecting the new mindfulness with which people are living their lives.

But attitudes about what it means to be vegetarian or vegan are changing, too, with some people taking an increasingly pragmatic approach. There was a time when choosing a plant-based diet was about taking an ethical stand based on answering principles. For many, this distinction between vegetarians and meat-eaters still exists – but for others, the lines have blurred. Not only does one British in five identify as ‘flexitarian’ (semi-vegetarian), but half of all those who say they’re vegetarian or vegan also eat meat ‘at weekends’, ‘occasionally’ or ‘on special occasions’. ‘Vegetarianism has grown and evolved – people dip in and out of it,’ says Jonathan Mose, Waitrose & Partners’ Executive Chef.

People are looking for meat-free inspiration throughout the week. Our ‘midweek meals’ recipes in Waitrose & Partners’ Weekend newspaper now include at least two vegetarian dishes. Searches for vegan and veggie barbecue recipes on waitrose.com rose by 350% over the summer, with boost from burgers and colour-ade-topping the bill. This year, Waitrose & Partners launched vegan sections in 134 stores. Our Cookery Schools ran twice as many vegetarian cooking courses as in previous years, with new courses including the Vegan Christmas Dinner.

Choosing a no- or low-meat lifestyle doesn’t mean missing out on time-honoured kitchen rituals. Today, we prepare and cook vegetables with the same care and attention we pay to meat and fish. Plant-based dining is reaching new heights, and not just in our homes and shops for the first time, this year’s The Good Food Guide has a mix of vegan and vegetarian dishes, of which 23% have a vegan ingredient and 17% are vegetarian. Sales of low-sugar granola and muesli ranges are up by 27% this year.

‘This year, we’ve seen veggie food go mainstream. Whether cooking at home, buying prepared food or trying the many newly vegan-friendly restaurants, people are discovering that it tastes amazing.’

NATALIE MITCHELL
Partner & Head of Brand Development

33.5%
OF THE POPULATION ARE CUTTING DOWN ON OR CUTTING OUT MEAT

21%
ARE FLEXITARIAN
9.5%
ARE VEGETARIAN
3%
ARE VEGAN

MORE THAN HALF OF THOSE DESCRIBING THEMSELVES AS ‘VEGETARIAN OR VEGAN’ DO SOMETHING EAT MEAT...

I NEVER EAT MEAT 40%
AT WEEKENDS 20%
ON SPECIAL OCCASIONS 8%
IF THERE’S NO OTHER OPTION 5%
NONE OF THE ABOVE 6%

60% OF VEGANS AND 40% OF VEGETARIANS HAVE ADOPTED THE LIFESTYLE OVER THE PAST FIVE YEARS

WHY HAVE YOU BECOME VEGETARIAN OR VEGAN?*

15% ANIMAL-WELFARE CONCERNS
45% IT’S HEALTHIER FOR ME
38% ENVIRONMENTAL CONCERNS
32% I DON’T LIKE MEAT
24% THE FOOD TASTES BETTER
2% IT’S FASHIONABLE

DO YOU EVER MISS EATING ANY OF THE FOLLOWING?*

41% SUNDAY ROAST
33% BACON SANDWICH
29% SALAMIC
18% BURGERS
12% CHICKEN
11% PORK SCRACHINGS

THE BIGGEST AREAS OF GROWTH ARE

+116% OAT MILK
+60% COCONUT MILK
+26% ALMOND MILK

AVOIDING THE ‘FOOD HANGOVER’

A FASTER PACE OF LIFE has resulted in a change in our relationship with food. Quantity is out and quality is in. For decades ‘feeling full’ after a meal was an aspiration, particularly in the post-war years. But today, 60% of people find this attitude outdated. They don’t want to feel sluggish and would rather eat smarter to feel healthier.

Views of healthy recipes on waitrose.com have risen by 136%, and visits to our online BMI calculator have increased by 104%. Meanwhile, searches for advice and products including the word ‘healthy’ have risen by 87%.

‘Customers tell us the most useful things we can do to help them with good choices are making healthy food convenient and easy, and providing recipe ideas,’ says Jane Orchard, Partner & Manager, Store Innovation. So this year, Waitrose & Partners launched a range of three-step recipes called Beautifully Simple. Almost 90% of shoppers who bought recipe ingredients returned for more.

Consuming lighter meals means drinking less alcohol, too, with nearly half of shoppers avoiding it entirely on weekdays. But we’re keeping our fluids up – around two thirds of us say staying hydrated is more important than ever before.

Our research found that 60% of respondents are trying to eat on the run, they’re now more likely to sit down to enjoy their meals mindfully. For instance, breakfast is becoming an event again, rather than a ‘grab-and-go’ meal. Sales of low-sugar granola and muesli ranges are up by 27% this year.

‘More of us are now recognising the importance of eating mindfully. It’s about enjoying food rather than just refuelling; eating more slowly to aid digestion, and taking time to recharge mental batteries.’

MOIRA HOWIE
Partner & Nutrition & Health Manager

OCURRENCE

QUOTES AND STATS

TREND #3

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TRENDS AND STATISTICS

TREND #4

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TRENDS AND STATISTICS

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FOOD AND DRINK REPORT

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WHAT WE’RE DRINKING

Adventure was the byword for 2018, with an eagerness to try something new – both at home and at the bar

PIERPAOLO’S DRINKS TRENDS

PIERPAOLO’S DRINKS TREND #1

EMBRACIGN THE NEW

It’s an exciting time to explore the drinks aisle or to try a new bar. There’s a real spirit of invention, with unusual or brand new products coming to the fore. We’re bolder with our choices and don’t feel the need to conform to a certain way of enjoying our favourite tipple.

Ice lollies made from Provençal rose are just one example of this trend for discovery. The ‘frosé’ ice lollies embody the sense of fun that shoppers are craving, and proved a huge hit in Waitrose & Partners stores over the summer. Consumers are certainly ready to experiment; Pedrino – a blend of Pedro Ximénez sherry, bitter tonic and water and all-natural citrus botanicals – has proved a popular new aperitif.

We’re also seeing brewers launch increasingly interesting and off-the-wall flavours in their craft beers and lagers. People are definitely ready to embrace the new, which means we’ll be seeing more of this bravery on our shelves.

‘People are ready to discover the new, the interesting and the different’

PIERPAOLO’S DRINKS TREND #2

RAISING A GLASS TO ORGANIC WINE

Sales of organic wine have increased by 53% year-on-year. The Waitrose & Partners range now includes 54 wines from 18 different regions, and is set to grow further.

A few years ago, if you were offered an organic version of a drink, you’d expect an element of compromise. Maybe you’d find the taste a bit rustic, or the price would make you think twice. This is no longer the case. It’s now impossible to taste two wines and say ‘this one’s organic and this one isn’t’. People are buying organic wines because they’re good.

Today, winemakers think about the degree to which they intervene in their vineyards more than they used to. If they can find a way to grow grapes organically, creating a product that’s as good-value and as good quality as non-organic wine – and in some cases even more flavoursome – then what’s not to like?

From drinkers to vintners, it’s time to give organic options serious consideration.

MOCKTAIL MAGIC

Soft drinks are having a moment, as well-known brands introduce more non-alcoholic options for mocktails.

Classy cider

Cider’s gone posh. But while the latter is made specifically from blue agave from a few specific areas, mezcal is produced all over Mexico from many more types of agave. It’s today’s hip spirit.

Greek wine

Red wine made from the Greek Xinomavro grape lends itself to being slightly chilled. Low in tannins, it’s soft, fruity and pairs well with rich food.

Flavoured gins

The nation’s favourite spirit continues to thrive, with subtly flavoured gins including hibiscus, pink grapefruit and Seville orange – along with a citrus sherbet gin from Heston Blumenthal.

Frosé

…aka frozen rose. Online searches for ‘frosé’ have increased seven-fold since July 2016, and visits to the frosé recipe page on waitrose.com have increased by 250% compared with this time last year.

SALES OF ORGANIC WINE

WE’RE BOLDER WITH OUR CHOICES AND DON’T FEEL THE NEED TO CONFORM TO A CERTAIN WAY OF ENJOYING OUR FAVOURITE TIPPLES

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WOODY BOYS

Mezcal

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The Great British Roast Review

Eating lighter meals midweek is all well and good, but when it comes to the weekend, the Sunday roast still tops the menu. It seems we just can’t get enough of this British institution.

**Chicken is the nation’s favourite** roast, followed by beef, then lamb. How to cook roast beef is the most popular voice-searched term on our website. But our research also revealed that the meal’s centrepiece is a secondary concern: Brits are twice as likely to choose roast potatoes as their favourite part of the meal than they are to say they like the meat the best.

Roasts are all about celebrating good food in the company of loved ones. In uncertain times, we retreat to life’s certainties, of the meal than they are to say they like the meat the best.

Almost one in three of us says the highlight of this meal is the chance to spend time with family. And this figure increases markedly as people get older.

According to our experts, there is also an element of ‘cool, relaxed nostalgia’ going on with the roast revival. This rose-tinted element is borne out in our research: 30% of people say their mum cooks the best roast, while only 10% say their partner does. And spare a thought for the nation’s fathers: just 6% of people reckon that Dad’s roasts are the finest.

Despite life’s increasingly unsettled routines, lunchtime on Sunday remains the overwhelming favourite time for a roast. The meal is a chance to let go. A third of us say we eat more food than usual on roasts.

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While the rest of the UK Prefer their Sunday Roasts at Lunchtime, Scots prefer theirs on Sunday evening.

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**What's your favourite roast?**

- 47% Chicken
- 27% Lamb
- 18% Turkey
- 7% Gammon
- 6% Pork
- 5% Turkey

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**What's your favourite part of a roast dinner?**

- 38% Roast Potatoes
- 18% Yorkshire Pudding
- 19% The Meat or Meat Alternative
- 7% No Favourite
- 7% Gravy
- 6% Stuffing
- 5% Vegetables

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**By its nature, you'd rarely choose to cook a roast if you were cooking for one. So it will always be a sociable meal.**

**People are looking back to old-fashioned values and heritage recipes. It's about the kitchen being the centre of the home, and the meals that Granny used to make.**

**Food and drink report**

**Waitrose & Partners**

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**Partner & Food Editor**

**Partner & Executive Chef**
FUTURE TRENDS

Look out for these five foodie fashions in 2019

1 PERSONALISED HEALTH

It sounds like something out of a sci-fi novel, but the mainstream use of artificial intelligence (AI) to improve our health and diet is just around the corner.

Thanks to algorithms, computer programmes, apps and voice-recognition technology, we’ll soon be able to receive accurate, up-to-date and tailored advice on how best to look after ourselves.

Whether through our smartphones, laptops or Alexa-style devices, we’ll be able to view personalised dietary tips and bespoke shopping lists. Access to phone-based GP services is growing in popularity, too. With NHS England publishing its code of conduct for the use of AI this year, a revolution in personalised dietary advice is on its way.

2 THE NEXT BIG SCOOP

Ice cream is having a moment. No longer the preserve of children’s parties or a day at the beach, the popular dessert is entering a new era of Insta-friendly indulgence.

Taking their influences from street food in Thailand, Hong Kong and Taiwan, trendy new parlours are popping up in the UK and pushing ice cream to the next level of sensory experience. Bubblewrap Waffle and Pan-n-Ice (whose ‘tacos’ are below), are just two London producers experimenting with new textures, colours and flavours – with very tasty results.

And with supermarket ice cream sales smashing the £1bn mark this year, we think this fun trend is only just getting started.

3 WEST AFRICAN FOOD

From Ghana to Senegal and Nigeria to Mali, food from West Africa is set to become the next big thing. Brits love their spicy food, and the flavours from this part of the world are extremely special indeed. Whether it’s tangy chicken yassa or tasty jollof rice, dishes are often cooked in one pot, so lend themselves to the trend for sharing. The vibrancy of the cuisine is astonishing.

4 LET’S GET BITTER

As a nation, we’ve long embraced sweet, sour and salty taste profiles. Now it looks as though their errant cousin – bitterness – is coming in from the cold. Already popular in drinks such as the negroni and Aperol spritz, bitter food is coming to a plate near you.

High-cocoa chocolate and kale are now part of the mainstream, while the trend for charring food over a naked flame is bringing a distinctive tang to restaurants. Our palates are about to take a further leap – forget social convention, it’s time to get bitter!

5 COCKTAIL CHANGE-UPS

Some very different ingredients will be finding their way into our drinks next year. As palates and lifestyles change, and demand for alcohol-free options increases (almost a third of 16-25 year-olds now don’t drink alcohol), mixologists are getting ever-more imaginative.

ALCOHOL-FREE ‘SPIRITS’ will provide even more complexity of flavour

SAVOURY NOTES The likes of pickled onion and beetroot will tickle taste buds

AQUAFABA Chickpea water to be used for vegan foam

KITCHEN TRIMMINGS By including fruit rind and veg peel, cocktails will reduce waste

KOMBUCHA We’ll see this fermented drink make its way as a mixer