



# 'No Accounting for Tastes'

Report  
November 2010

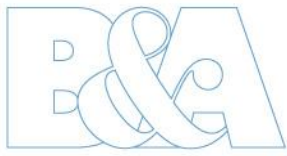
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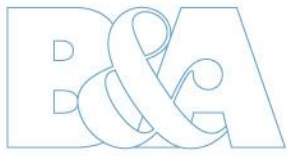
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## i. Introduction

The latest Consumer Watch report from Ireland's leading independent research company- Behaviour & Attitudes- highlights the changes in Irish people's eating habits over the last two decades. In particular we have tracked:-

- 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 earlier surveys carried out on behalf of the Sunday Tribune and the Institute of Advertising Practitioners in Ireland. The first of these was carried out in 1991, the second in 1995.

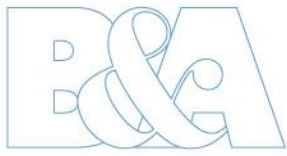
The survey was carried out using the Behaviour & Attitudes' Barometer Survey. This is a syndicated survey allowing client companies cost effective access to a nationally representative sample of 1,000 adults. The survey is conducted fortnightly, using a fresh sample of respondents each time. The sample is quota controlled by all of the normal demographic variables to reflect correctly the known characteristics of the adult population of the Republic of Ireland.

All interviewing was carried out on a face-to-face basis by trained members of the Behaviour & Attitudes field force working under supervision and within the guidelines set by the Marketing Society of Ireland and ESOMAR.

The data for this study derives from a Barometer Phase with fieldwork between 22<sup>nd</sup> October and 2<sup>nd</sup> November 2010.

A copy of the questionnaire used for the survey is included as an appendix to this report.

Additional tabular data is available on request from [luke@banda.ie](mailto:luke@banda.ie)



## ii. About Behaviour & Attitudes

Behaviour and Attitudes is Ireland's largest and most experienced independently owned research company. We have 30 permanent staff members including 10 directors, the most experienced team in the Irish market. In addition, we have a team of over 150 experienced, fully trained face-to-face interviewers nationwide. Our Dublin CATI (telephone) Unit is based in our offices in Milltown and has a capacity of over 75 interviewers.

Established 25 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI (Computer Aided Personal Interviewing), through to standard face-to-face interviewing surveys, CATI (Computer Aided Telephone Interviewing), central location interviewing, as well as an in-house CAWI Unit (Computer Aided Web Interviewing). The company would be well known for having pioneered the development of qualitative research in Ireland.

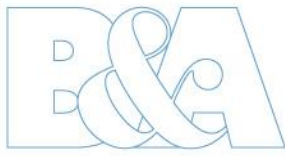
Despite being the second largest market research company in Ireland, Behaviour & Attitudes has a very well defined and tight company structure which is built around excellent client service delivery principles.

Behaviour & Attitudes is fully owned by its 10 Directors. These Directors are continuously involved in day-to-day research on behalf of their clients. Hence, our clients have access to the most senior team in the Irish marketplace.

For more information please visit our website at: [www.banda.ie](http://www.banda.ie)

# Findings





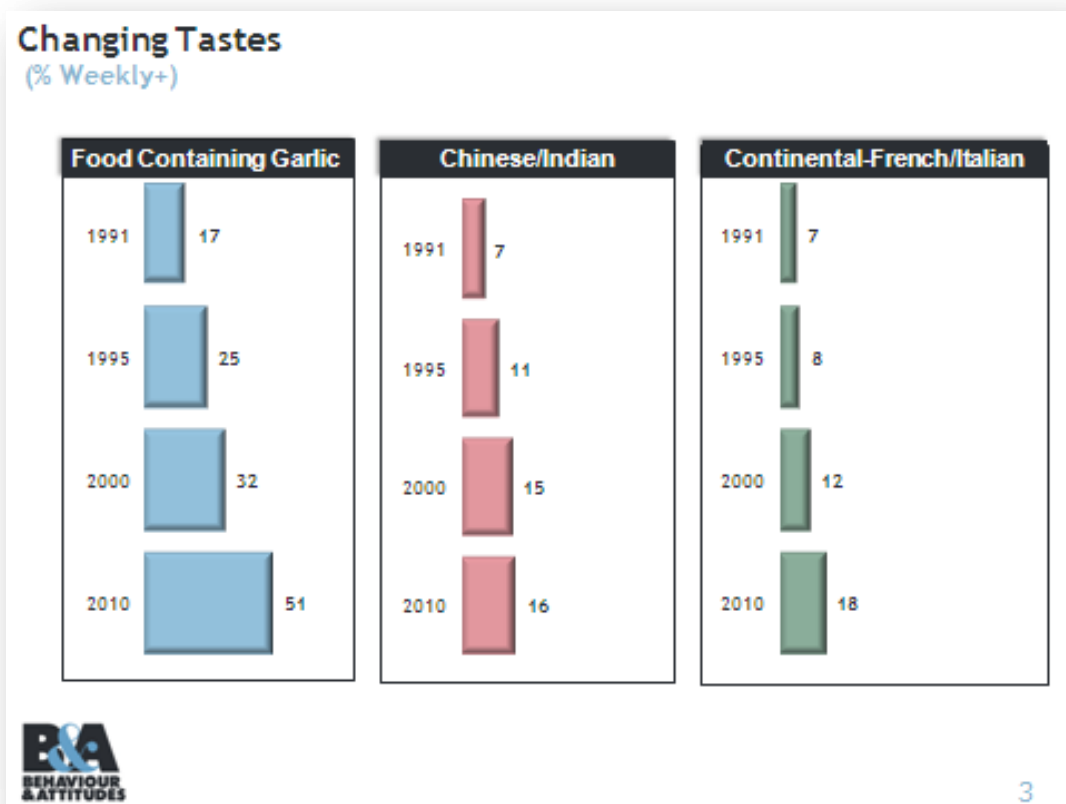
## Section One - “What Do You Feel Like?”

### 1.1 “Buon Appetito!”

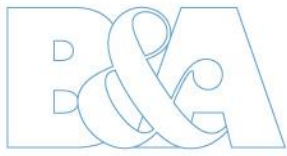
Expansion of our food horizons continues, but a marked divide exists in taste buds of under 50s vs. over 50s, with the former displaying more exotic tastes.

In a typical week nowadays about half of Irish adults consume food containing garlic, compared to only one third in 2000.

About 1 in 6 of us has a Chinese or Indian meal in a typical week similar to 2000 - perhaps an indication of our early adoption of spicy foods. Now 1 in 6 of us consume a continental (French/Italian) meal - did we become more ‘sophisticated’ during the Celtic Tiger?

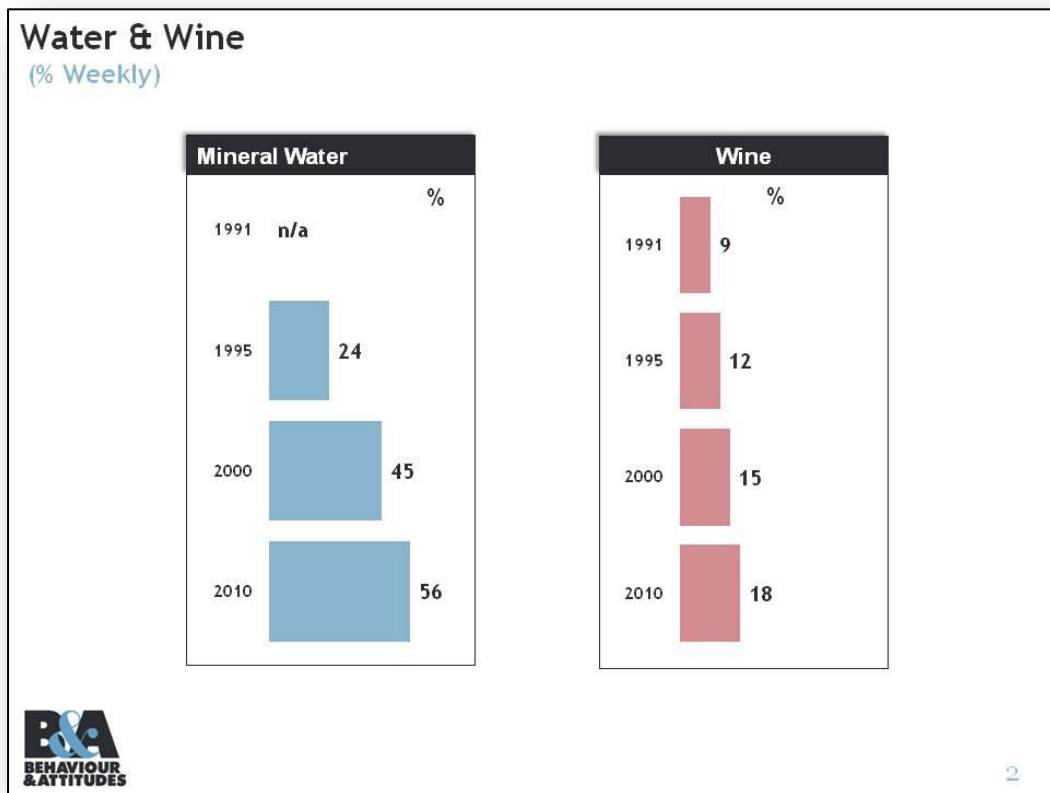


It can be seen from the chart that the popularity of these food options has grown substantially since 1991.

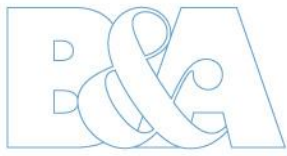


## 1.2 “And to wash that down?”

The growth in bottled water consumption has been spectacular. Most over 40 can probably remember the scepticism that greeted the launch of Ballygowan in Ireland. Nowadays over half the adult population drink bottled waters in a typical week. This number has more than doubled in the past 15 years. In 1991, it was such an unlikely prospect, that we didn't even bother to take the measurement.

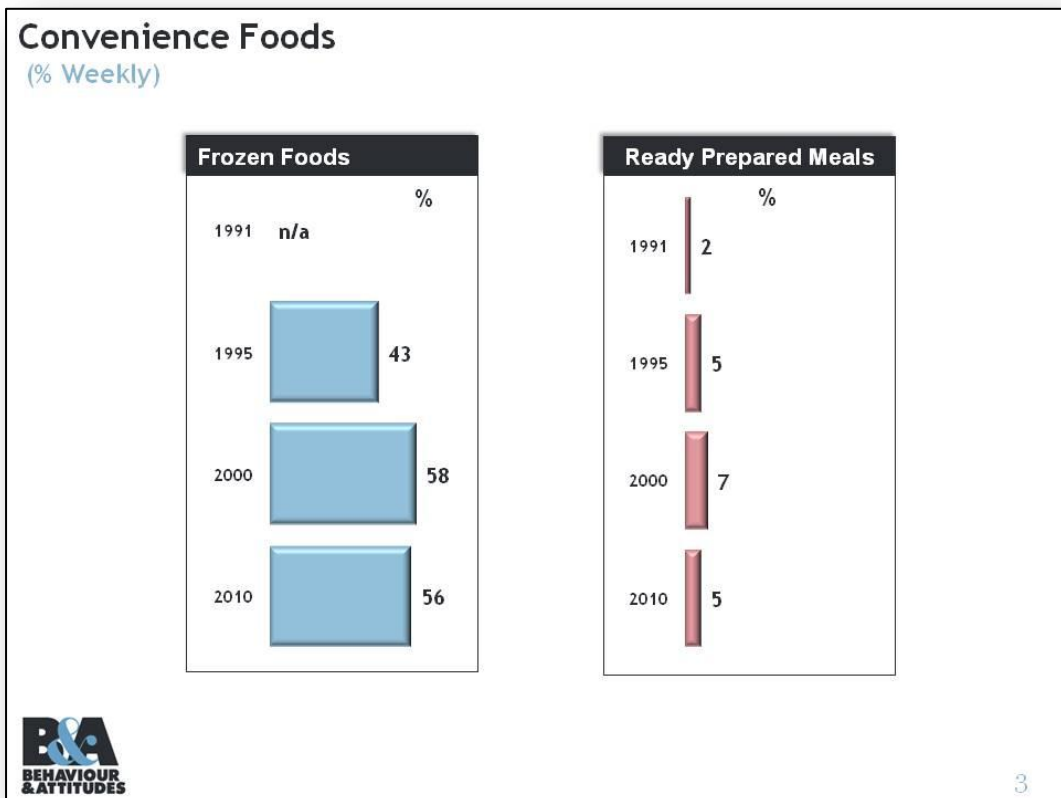


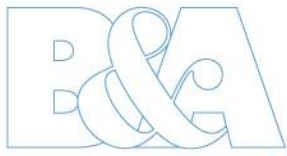
Most of us would be rightly conscious of the very significant increase over the past two decades in the incidence of wine consumption. If one takes into account the increase in volume consumed per head, it has grown even more spectacularly than that.



### 1.3 “Is the attraction of convenience waning?”

While there has been much talk about a return to the traditions of home cooking, over half of Irish people eat some form of frozen food in a typical week. However, the attraction has at least plateaued. A similar trend is evident for ready prepared meals, where only 5% of the population now consume at least one in a typical week.

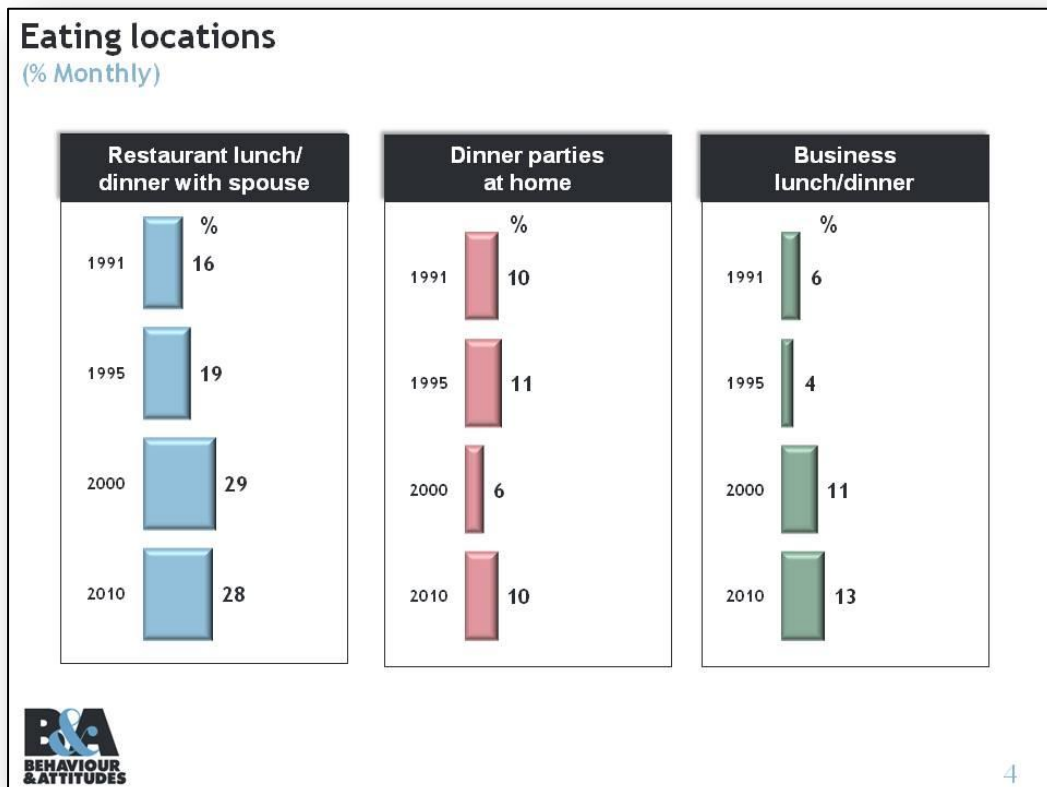




## Section Two: “Where Will We Eat?”

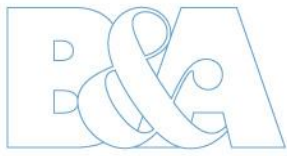
### 2.1 “Home entertaining returns”

Almost a doubling of home entertaining has occurred since the turn of the Millennium, back to percentages last seen in the 90s. Note the adult population has grown substantially from 2,585m in 1991 to 3,522m in 2010. Thus the absolute numbers entertaining at home are now quite substantial in a typical week (337k). From our qualitative research we know the dynamics and nature of home entertaining has changed quite dramatically.



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

While the ‘eating out’ proportion appears quite static, we know that the nature of these has changed with the realignment of what ‘eating out’ now means.



Interestingly, the traditional business lunch/dinner has remained steady amongst the core minority partaking. Remember the year 2000 was pre-Celtic Tiger! Thus we suspect the incidence would have been substantially higher during the ‘Tiger’ years.

## 2.2 “Watching what we spend”

A return to the 90s is again evident, with a decline in eating in more casual fast-food /café type establishments, and buying take-away foods.

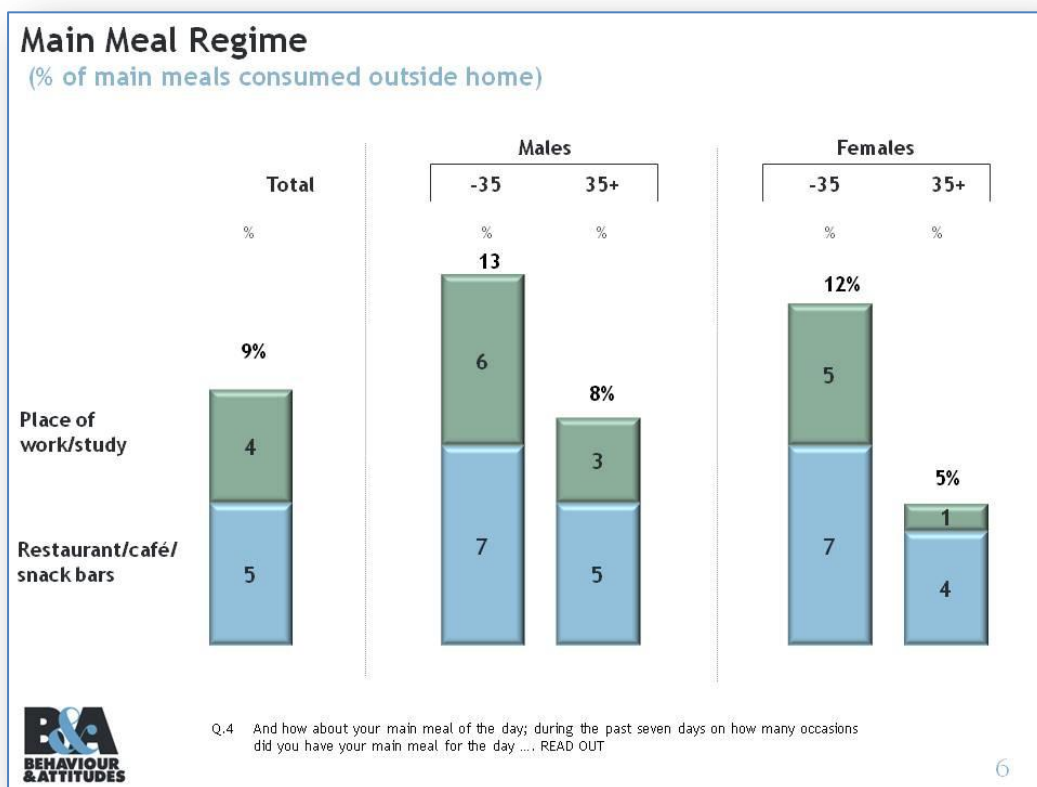
The decline is more marked for fast food restaurants than take-away foods.



## 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 11 main meals are consumed outside the home.

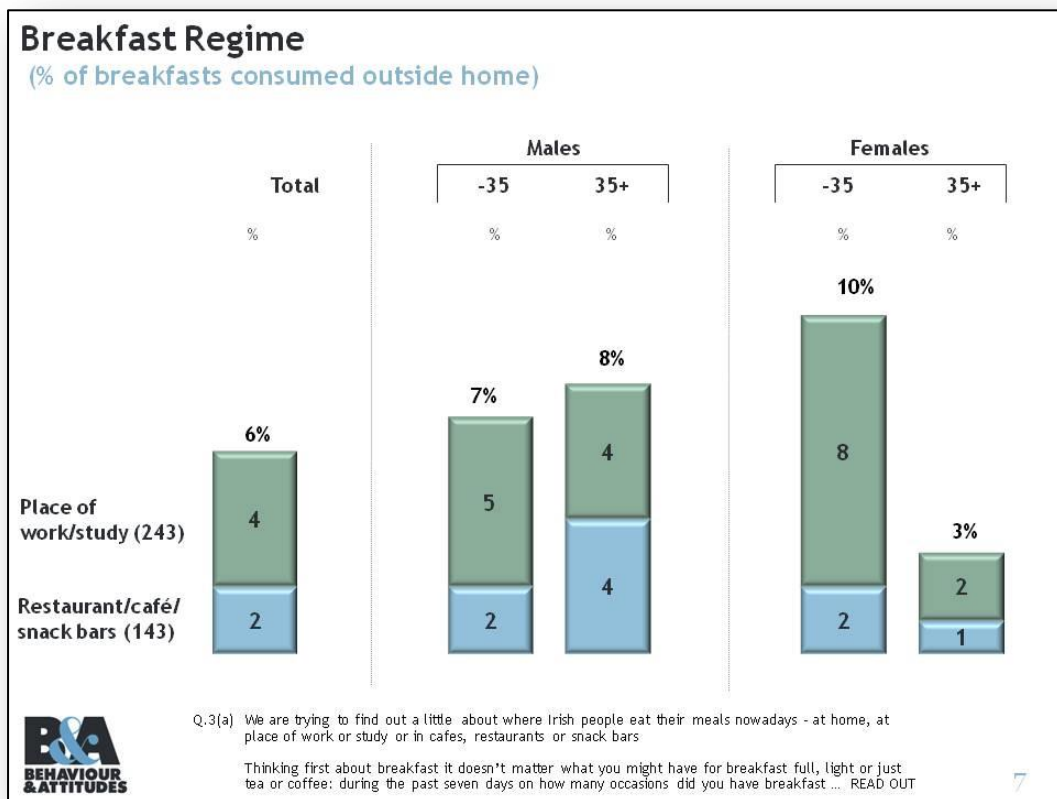


For people aged under 35 this rises to 1 in every 8 main meals consumed outside the home.

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 6% of all breakfasts are now reportedly consumed outside the home in another fixed location.



The pattern is much more prevalent among young people, particularly young females. 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, especially women.

We do not measure breakfast 'on the hoof' in this data set, but from other research we know it is a significant player.

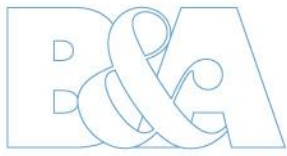
## Typical Breakfast

### Key Demographic Differences

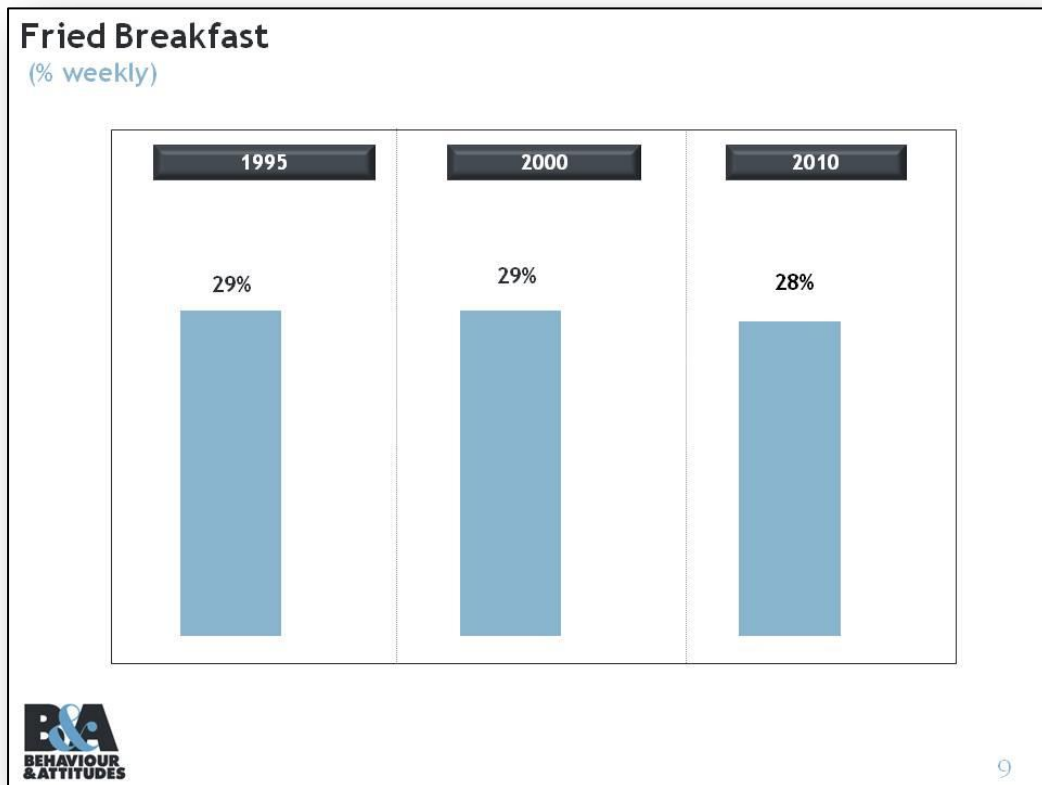
	Total	Males		Females	
		16-34	35+	16-34	35+
UNWTD. SAMPLE	1014	194	306	180	334
	%	%	%	%	%
Tea/coffee	78	69	84	69	83
Bread/toast	54	48	63	41	52
Cereal/muesli	50	56	44	49	17
Juice	18	22	14	22	12
Porridge	7	2	9	2	3
Fried breakfast	6	12	7	3	5
Yogurt	5	4	4	5	4
Water	5	6	3	7	3
Eggs	4	3	7	5	4
Fruit	3	3	3	3	0
Other	4	2	1	0	3
Nothing	3	4	2	6	1

The staples for breakfast are somewhat predictable. What is very striking however is the extent to which younger people are losing the habit of eating bread and toast (coffee/tea consumption is stable versus 2000). They are moving towards a greater interest in cereals, muesli and juice. Indeed other healthier alternatives such as yogurt, water etc. are generally emerging more in 2010.

Perhaps not too surprisingly, there is a remarkable difference between men and women in their fondness for the traditional Irish fried breakfast. While younger males still love the 'full Irish', a degree of pull back is evident among their older male counterparts.



The figures in the preceding table relate to a typical day's consumption pattern. 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 the last 15 years

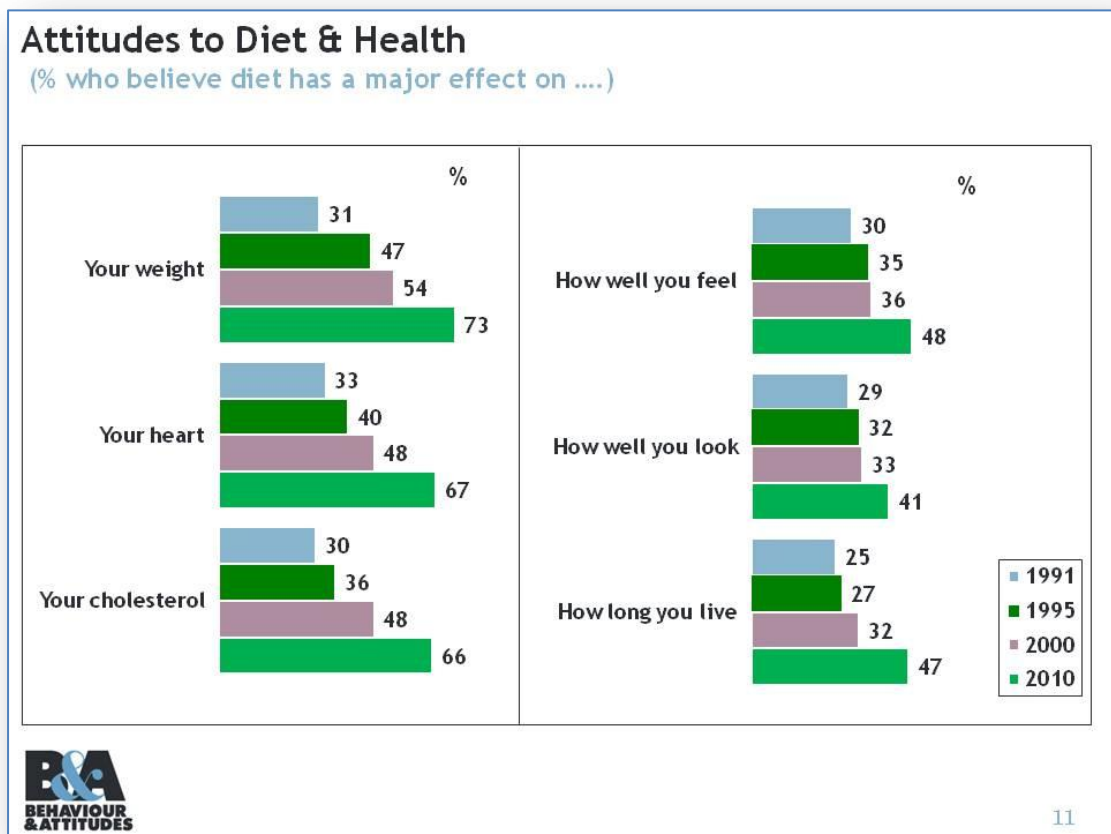


In part this may also reflect newer 'convenience' versions of the traditional fried breakfast (e.g. The Irish Breakfast roll).

## Section Three: “Marketing Works”

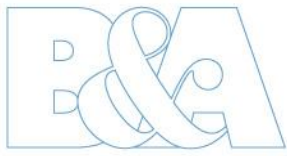
### 3.1 “Does my bum look big in this?”

We have come a long way in twenty years in terms of our attitudes towards our health. It is clear that Irish people have increasingly been absorbing key marketing messages over the last 20 years, especially those around weight, heart and cholesterol.



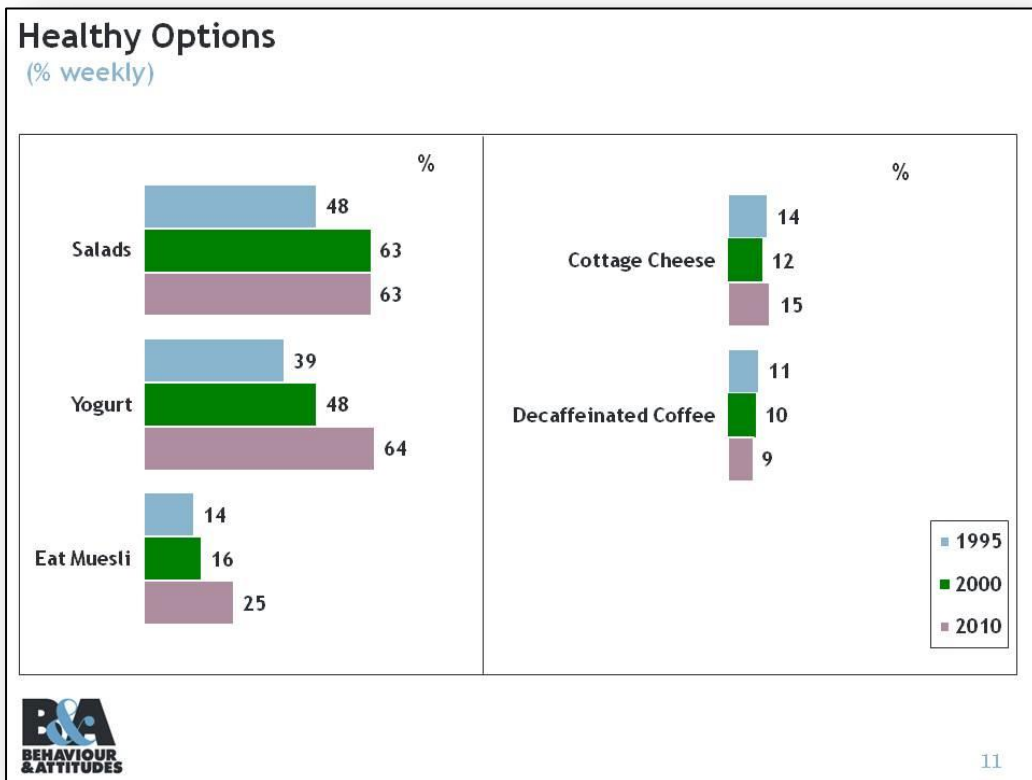
It seems clear that people are becoming increasingly convinced that diet can have a major effect on all aspects of our lifestyles.

Encouragingly awareness of key messages around cholesterol and heart health is not confined to older individuals, but is being absorbed by the population aged 25+ years.



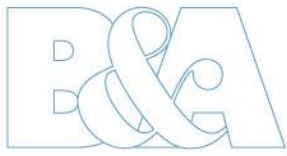
### 3.2 “Something light and healthy perhaps?”

In line with greater attention being paid to health messages, we have expanded the range of healthier foods we consume.

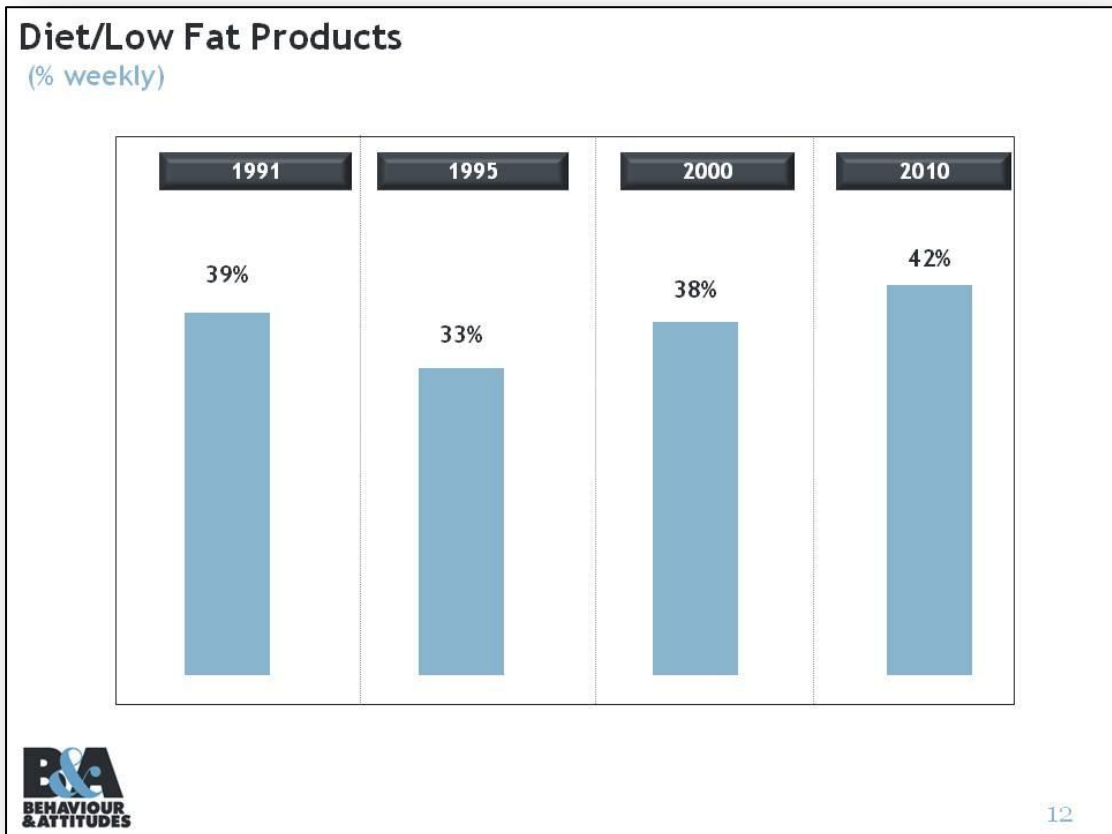


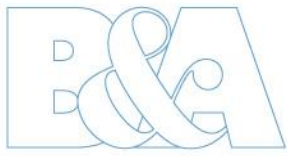
Weekly+ consumption of salads has plateaued at 63% of Irish people. However, significant growth has registered over the last decade in yogurt (remember the cholesterol awareness levels) and muesli consumption.

Modest growth was recorded in cottage cheese consumption, with decaffeinated coffee appearing to be facing an uphill battle - our healthiness does not stretch this far!

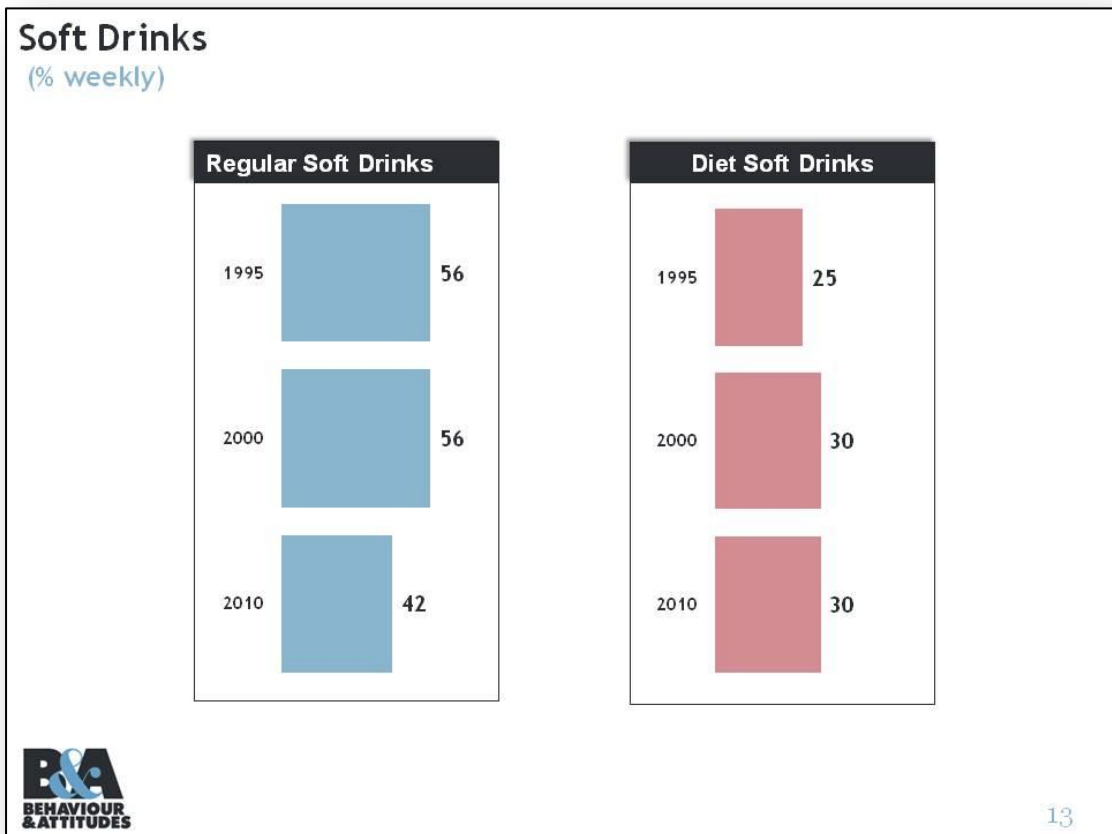


In line with our heightened awareness of our health and attitudes to food, it is not surprising that for the third wave since 1995, Irish people register an increase in diet/low fat product consumption. 2 in 5 Irish adults now consume diet/low fat products weekly.

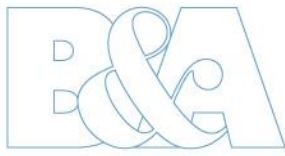




In the soft drinks area, there has been a decline in the incidence of weekly consumption of regular soft drinks but the diet option has maintained its penetration since 2000. The question is - has the appeal of the diet option reached its potential?



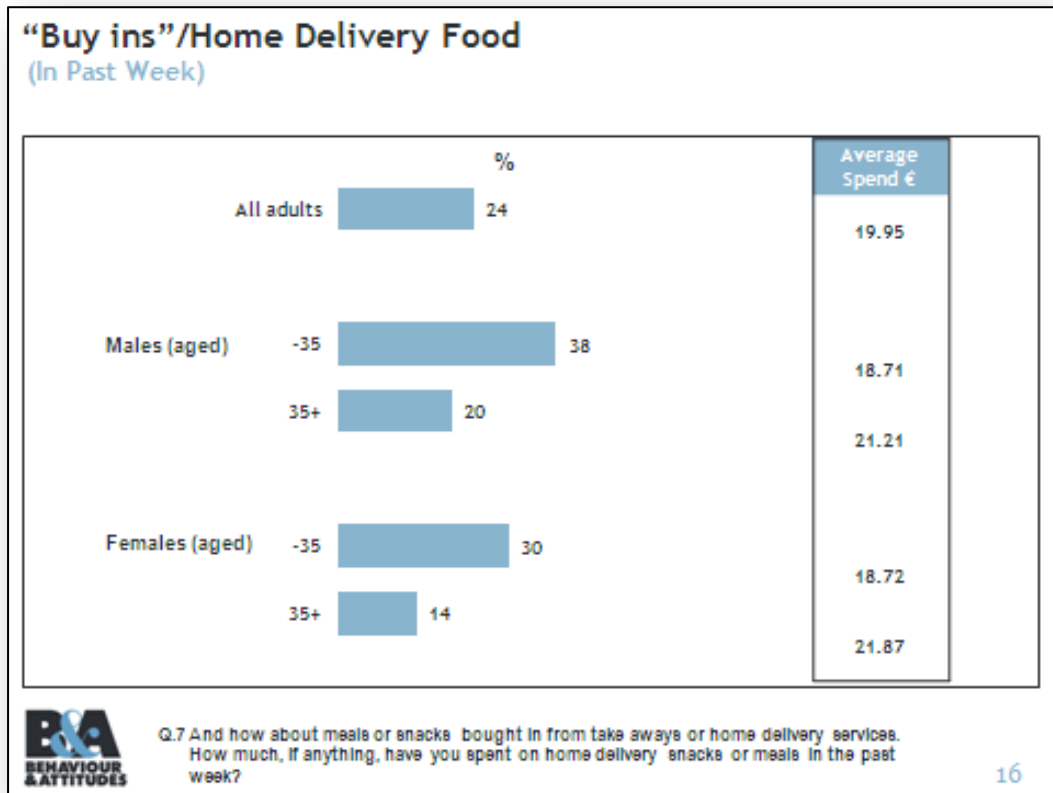
The plethora of 'other' drink options available and indeed our 'love' of the water option must be having an effect here.



### 3.3 “Take-aways approaching a billion euro annual market”

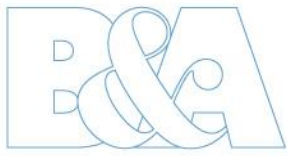
A quarter of adults buy some take-home or home delivery food in a typical week nowadays and they spend an average of about €20 per head per week. This equates with approximately €860 million per annum.

The spend per head was only €10 in 2000.



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 slightly more per head on average.

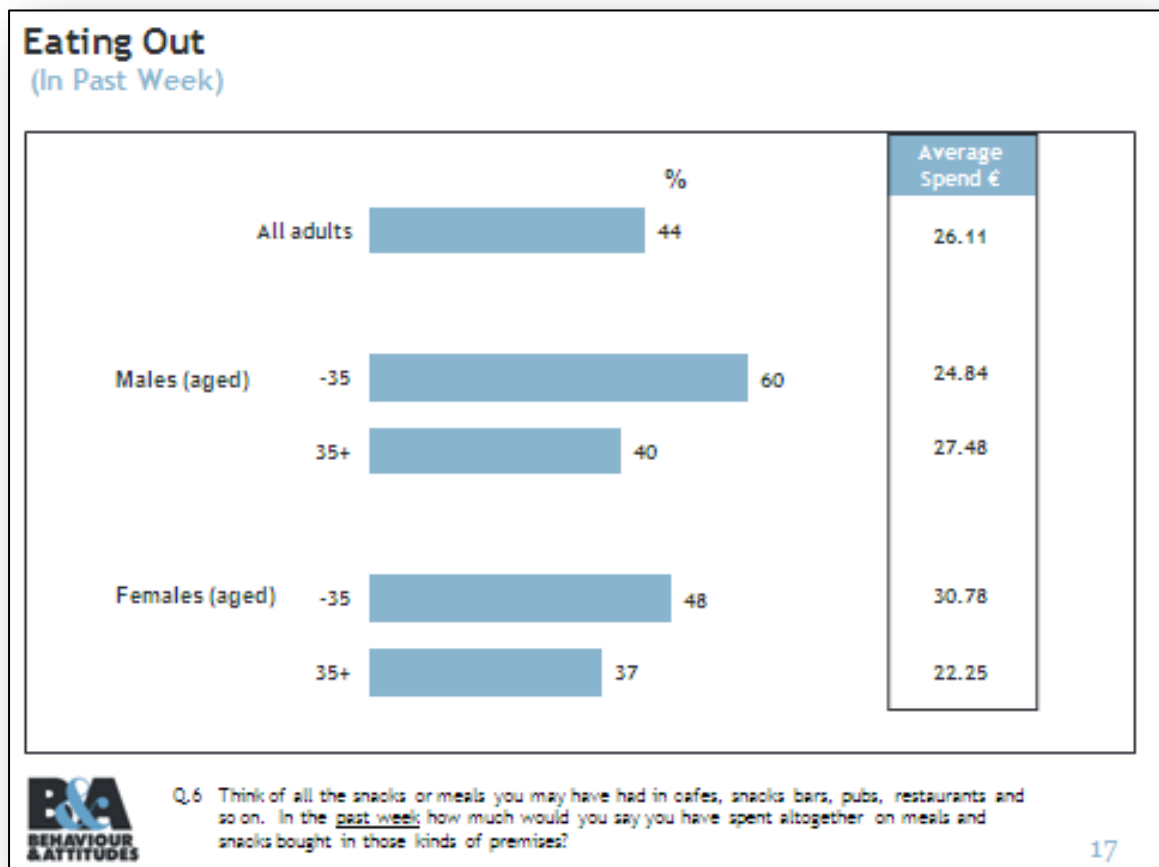
Note a decline registered versus 2000 in males under 35 buying in food, with the over 35s registering a slight uplift.



## Section Four: “We Still Eat Out!”

### 4.1 €2 billion spent annually on eating out

In overall terms, 44% of adults eat out (in any form) at least once in a typical week. The average per capita consumption on eating out is reported at about €26 per week. This would equate with a total expenditure of approximately two billion euro per annum.



Younger males especially, are significantly more likely to eat out than their older counterparts. However a growth in over 35 year olds eating out has been registered since 2000.

While fewer younger females eat out compared to males, they tend to spend more.