



## **Food Habits & Social Change**

Chapter 1: Routine & Occasion

Eating fast food to make time for slow food

March 2008

*Kellogg's*®

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## Foreword

It seems every day there is another story showing our nation's love, hate relationship with food. When it comes to our diets, we are regularly told what we're doing wrong but, for the most part, we're still in the dark about why we make the food choices we do.

As a food company this got us thinking ...

- Has the food we eat changed or have our lifestyles?
- We spend a fortune on designer kitchens and our evenings watching chefs on television – so why the rise and rise in convenience foods and the reported decline in home cooking?
- Some of us are worryingly underweight, some morbidly obese – how does body image become so polarised?
- Is food becoming a new social currency and what does what you eat 'say' about you?
- What does all this look like in ten or twenty years?

Obesity, nutrition, food education, responsible manufacturing and marketing are all, quite rightly, high on the news agenda and that won't change. Every day we seem a little more knowledgeable about "what" is happening when it comes to food trends, but is there anybody out there taking a step back and asking "why?" and what it means for the future?

We asked the questions but struggled to find the answers. So, we decided to commission our own research.

The result is the following report from the Future Foundation – leaders in understanding how we behave now in order to forecast the social trends of the future.

We've found the report fascinating, surprising and, in many cases, reassuring. In the coming months it will be supplemented by other similar pieces of Kellogg's/Future Foundation research focussing on other important food issues – there's a lot more to come.

I know that, going forward; it will help shape our thinking here at Kellogg's. I hope it gives you pause for thought too.

*Chris Wermann, Kellogg's Corporate Communications Director.*

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## Introduction

Every day Britain's farmers, supermarkets, restaurants, cafés, kebab shops, tapas bars, chippies, sandwich shops and vending machines offer British consumers a feast of food opportunities. Food is available in ever-greater variety and quantity, and we are increasingly used to eating what we want, when we want.

As a result, our expectations of food are changing. With the abundance, availability, and flexibility has come a range of new aspirations and habits. Increasingly our choice of food is linked to the context in which we consume our food. We also have more polarised expectations of the cooking experience: new food occasions are becoming ritualised, whilst routine food is more and more about refuelling – little and often.

*"Food culture is incredibly malleable. It changes very much, very quickly and we're going through a period of immense change again."* Tim Lang, Professor of Food Policy at City University

This research report, commissioned by Kellogg's, aims not only to challenge a number of widely held assumptions about food consumption, but also to explore trends that at first sight appear to be contradictory: the growing take up of prepared food as well as the increasing desire to cook from scratch for instance. The research process combined new consumer research and expert analysis to help uncover the most important changes in the coming years, as well as better understand the needs driving the changes.

*"Everywhere you turn you've got Jamie, you've got Hugh, you've got the Daily Mail, you've got the food doctor, you've got the eating disorder charity, you've got all these people and the people who are doing the real good actually have the quietest voice."* Emma Stiles, Chair of the British Association for Applied Nutrition and Nutritional Therapy

This report focuses on food routines and occasions and is structured in three sections. The first section reviews the key social drivers influencing our expectations and consumption of food, with a stronger focus on time pressures. The second section analyses how people still find the time to eat together, and what they expect from the experience. And the final section examines how flexibility and effective time management influence our expectations.

Some of our findings:

- Contrary to widespread belief, the amount of time that we spend eating together as families has remained stable since 1995. As the reality of a steady home life becomes more elusive, it is gaining strength as a powerful symbol of happiness. The family meal, as an occasion to 'perform' family-ness becomes ritualised.
- The apparent contradiction of a growing take up of prepared foods and the increasing desire to cook from scratch is not in fact contradictory: it is a manifestation of our growing proficiency in terms of time management.



- Despite common perceptions, the pace of modern life has not meant the end of the breakfast at home. The home is still the number one location in which breakfast is taken, but recent research shows that not only is breakfast lighter, it is increasingly on-the-go in the home.

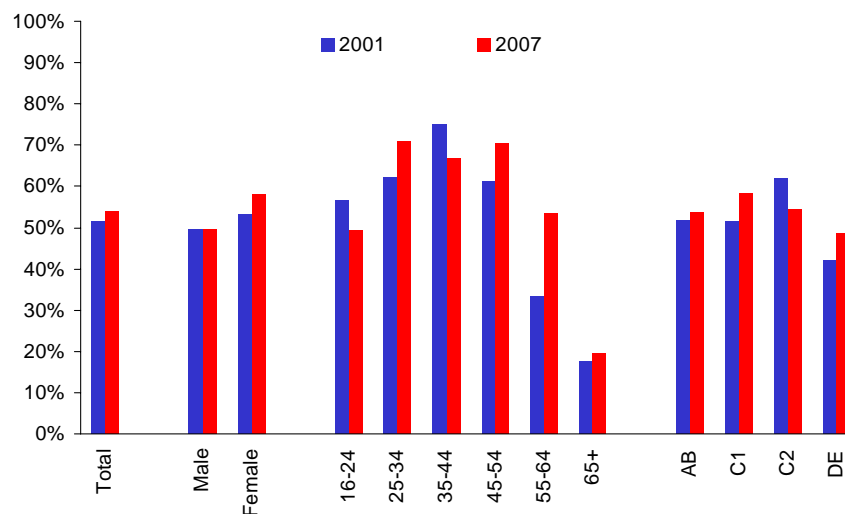
## 1. Time pressures

### 1.1. Mobility, flexibility, and working habits

As time becomes more valuable, our perception of time pressure is growing. This corresponds at least in part to a real mushrooming of demands on our time. Time spent 'out and about', i.e. not at home or in the workplace, has doubled since 1960 for instance. The entry of women into the workforce with over 75% of married women of working age in employment, compared with a quarter in the 1950s is also a contributing factor. However, the emphasis on work-life balance showed that balancing work and domestic roles is now an issue for both sexes. More than this, there are many more expectations from consumers about the meaning of a fulfilled and balanced life, which is increasingly taken to mean having leisure pursuits, active social lives, meaningful relationships and overall self-fulfilment, all of which take time.

**Chart 1 'I am often under time pressure in my everyday life'**

Proportion who agree or strongly agree, by gender, age and social grade

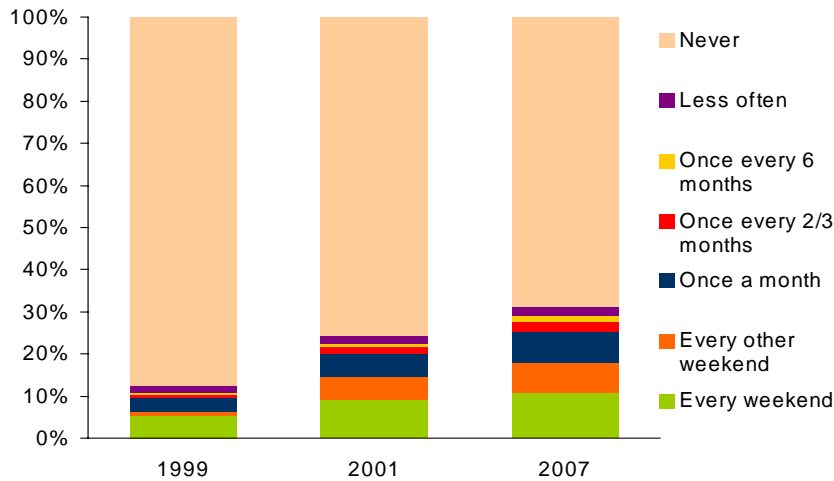


Source: Kellogg's / Future Foundation Base: 1,200 aged 15+, UK

Many commentators suggest that we spend ever-increasing time at work as well as commuting. However most of the available research (including government ONS data) shows that we are in fact spending less time at work and more time entertaining ourselves, often out of the home. However, whilst increasingly mobile and flexible ways of working bring convenience, they also imply a growing blur between workspace and private space. This means that it is getting harder to switch off, and

even though full time workers in the UK work on average 2 hours a day less than they did 10 years ago, the perception of time pressure remains.

**Chart 2 Frequency of working at home at weekends**



Source: Kellogg's / Future Foundation Base: 553-662 workers aged 16+, UK

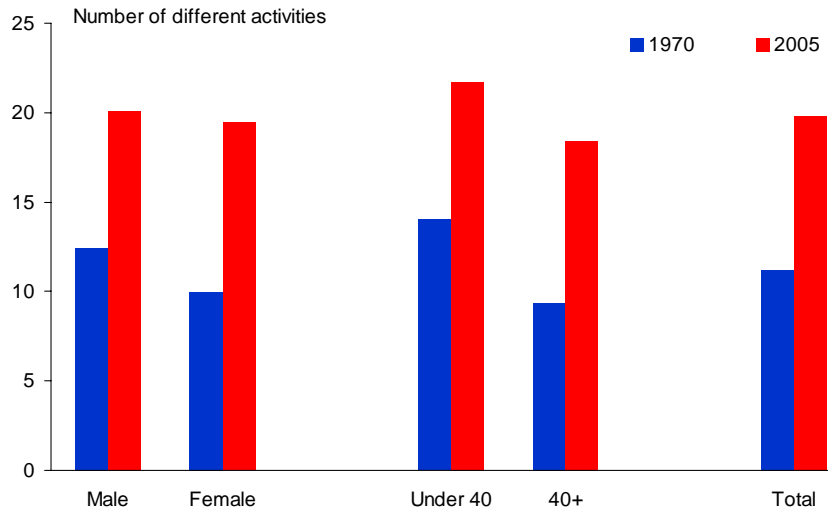
## 1.2. Changing leisure habits

While, on average, we're at work less we still feel busier and that's not surprising. We *are* busier. The number of leisure activities in which we participate has nearly doubled over the course of the last twenty-five years from 11 to 20 in 2005, with the greatest increases occurring among females and those 40+. However, leisure time has increased by only 20 minutes per day over the past thirty years. Therefore, it can be assumed that it is the desire to engage in a varied leisure portfolio that drives this increase rather than the attainment of more free time. We are increasingly aspiring to 'have it all'; participating in more activities is one route people take to lead a full and interesting life. Cooking is one of our newfound leisure interests, our enthusiasm fed by a diet of prime-time celebrity chefs on television, cookery books and coverage of cooking in newspapers and magazines.

We are also moving from a 24-hour society, to a society we might call the 25-hour society, where more is done in the same space of time, and where people feel that they should be managing to do more with their free time. ISER research presented late last year suggest that some consumers are potentially doing more than 7.2 hours per day in additional activities, promoted by access to new communication technologies.

**Chart 3 Leisure participation, by gender and age**

Number of different leisure activities people engage in during a twelve month period



Source: Kellogg's / Future Foundation Base: All respondents in London/South East amongst 1000 - 2000 adults 16+

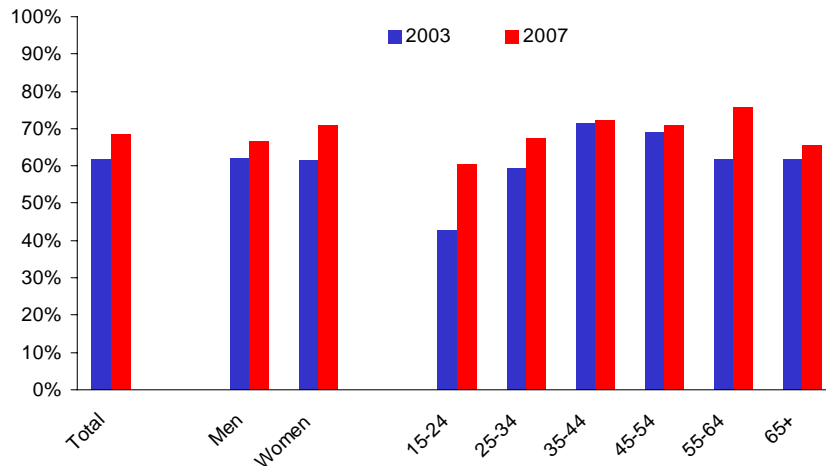
**1.3. Changes in family life**

The evolution of the modern family and our expectations of family time also have an impact. Future Foundation research shows that despite a 'myth of decline', it is in good health and we are investing more time and effort into our families than any previous generation.

Nearly 60% of those in the 'family' stage derive most or all of their satisfaction from their families, while a further 36% gain equal satisfaction from both their families and out of home activities. Having children seems to have a dramatic affect on how much happiness is gained from the family.

#### Chart 4 Growing focus on family time

69% of people surveyed got more satisfaction from their family than from away from home activities in 2007, up 7% on 2003



Source: Kellogg's / Future Foundation Base: 1,200 aged 15+, UK

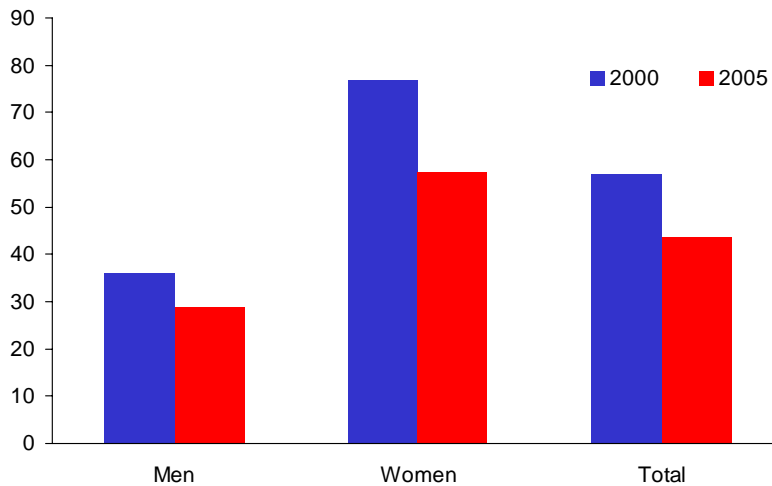
In terms of childcare, we are also becoming more hands on parents, and investing more time. As we are considering having children as a lifestyle choice rather than a lifestage, we tend to be more financially and emotionally ready when we do start a family. Parents are spending more time than ever with their children. Today's parents an average of 99 minutes a day on childcare, in comparison to 25 minutes spent by parents in the 1970s.

#### 1.4. Time spent on household activities

We've become adept at managing our time, employing labour-saving devices, multi-tasking and – in many cases – enjoying the challenge of organising busy lives. We've been successful in reducing the amount of time spent on tedious, everyday chores. Partly this has been due to an increased willingness to contract out housework. The time saved on tedium is invested into a growing refocus on the family. Between 2000 and 2006 the number of people paying others to do domestic tasks increased considerably. Perhaps unsurprisingly, given the increased economic activity of women, the biggest rise was in paid for child-care: a necessary condition for many women in families with young children to go to work.

**Chart 5 Consumers are spending less time on cooking/ washing up:  
above all, we want convenience and functionality**

Time per day spent cooking/washing up\*



Source: National Statistics Time Use Survey/nVision Base: 4941 adults aged 16+, UK, 2005 \*Some difference in methodology between 2000 and 2005, hence it is possible that the reduction in time spent on cooking and washing up is overstated

With busier lifestyles clearly there must be a trade off between the preparation of formal meals and being able to feed a family quickly and easily. Hence we observe what appears to be a paradox; at the same time as our interest in cooking from scratch is climbing, over 50% of our sample use convenience foods every week. That proportion rises to 65% for the 16 – 24 year old group. To view the data on a regional basis<sup>1</sup>, we find that it is Scottish consumers that are most at ease with buying pre-prepared, convenience foods: 64% do so at least once a week as opposed to roughly half of those living in the rest of the UK.

<sup>1</sup> In the report, the 'North' refers to the northern regions of the North East, the North West, Yorkshire and Humber and Scotland. The 'South' refers to the South East and Greater London regions. Occasionally the report refers to Scotland in isolation.

## 2. People are finding time to eat together

### 2.1. Aspirations and food

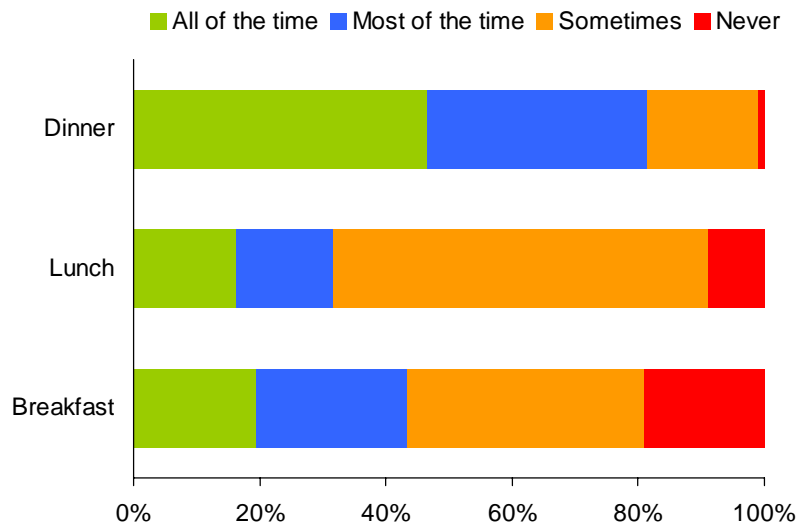
#### 2.1.1. Meals taken together are increasingly an opportunity to perform 'family-ness'

Even though a huge 83% of the people we surveyed for this report agreed that nowadays, households eat together less than they did five years ago, the perception is at odds with reality: 58% of our sample ate their evening meal with all the members of their household every day. We may believe that it's on the wane but the shared evening meal remains at the centre of family life.

Where does the perception come from? An answer lies in the age of the person being asked; generally speaking older respondents were more likely to believe that family mealtimes are in decline. Tellingly people without children also tend to think that families eat together less. Those with children are more sceptical however. In reality, the evening meal retains its importance as a family bonding occasion; 82% of people have dinner with their children all the time or most of the time. For those inhabiting the UK's southern regions, 80% of those surveyed do the same. The most regular parent-child eating occasions are to be had in Scotland, where 92% of people claim to have dinner with their children all the time or most of the time.

**Chart 6 Dinner is the most important meal for families with children**

82% of people have dinner with their children all the time or most of the time



Source: Kellogg's/The Future Foundation Base: 278 parents (with kids under 16) aged 16+, UK, 2008

Spending quality time with the family around a meal remains valued with many parents making sacrifices elsewhere to spend more time with their children.

*"As families, it's the experience of taking your time, sitting down. You sit down and you just stop. You pause for breath and take your time, you talk about the day and that thinking goes through to how you as a parent try to live your life."* Julian Hunt, Director of Communications at the Food and Drink Federation

As the reality of a steady home life becomes more elusive, family-ness is becoming a powerful symbol of happiness, as an aspiration rather than a regularly lived reality. This creates higher expectations: we tend to make a fuss of the smallest celebrations and are on the lookout for everyday food occasions. In this context, the family meal, as an occasion to 'perform' family-ness, becomes increasingly ritualised. Similarly, breakfast at the weekend grows in importance. One of the most important implications in terms of food consumption is a lesser divide between everyday cooking and 'special occasions'.

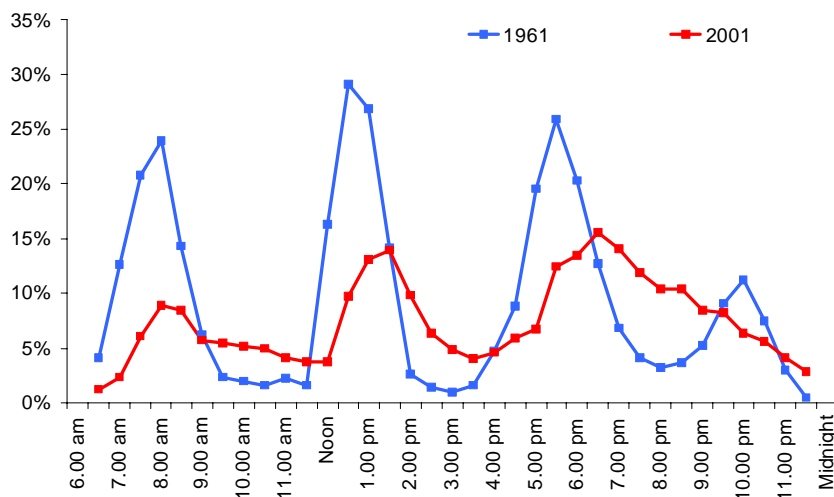
*"You have less family meals during the week but you have more pressure and expectation if you're going to have a [more formal] meal: everyone is around the table, the 'perfect family'. That happens at the*

*weekend and there is pressure to have a big event... I think there's a huge pressure and social expectation particularly among the middle classes to make a performance happen and to be a good parent."* Natasha Finlayson, Communications Director of The Princes Foundation for Integrated Health

One of the consequences is that we tend to have dinner later in the evening, maybe to ensure as much as possible that all members of the household are there. In 1961, 78% of people had dinner between 5pm and 7pm, with a peak at 5.30pm. In 2001, only 48% of people had dinner between 5pm and 7pm, with a 6.30pm peak.

**Chart 7 Later dinners**

% eating or drinking, in or out of home, by time of day, all days, 7.00am to Midnight



Source: Kellogg's / The Future Foundation Base: 545/654 adults in households with children

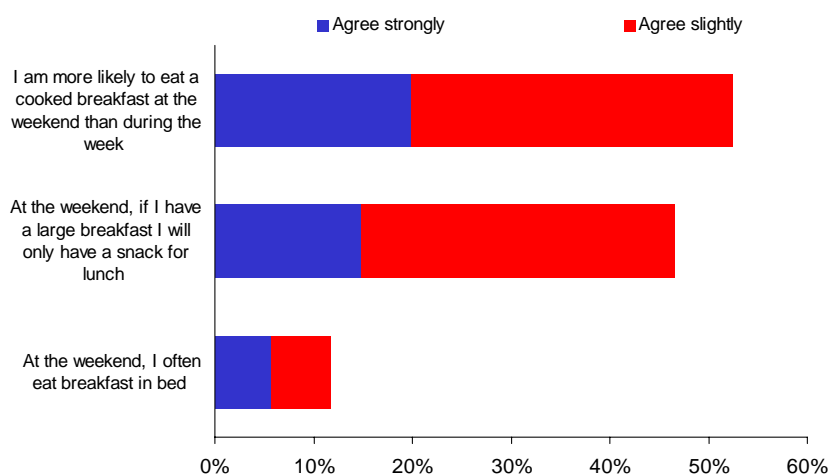
**2.1.2. Weekend Breakfast**

With the weekend providing an opportunity to slow down, the weekend breakfast is enjoying a greater prominence. It becomes not just a meal, but quality time, an occasion to enjoy one another's company and increasingly a luxury. This has an impact on the food we consume for breakfast, with more indulgent foods such as croissants, cooked breakfast, smoked salmon, etc... more likely to be consumed at the weekend than during the week: more than half of the people we surveyed are more likely to eat a more substantial, more time-consuming breakfast at the weekend.

This is the case for 52% of those living in the UK's northern regions, with southerners slightly more likely (56%) to upgrade their weekend breakfast.

*'Feast-day foods everyday. That's the rule. There's a shift from everyday food plus feast-day foods to feast-day foods everyday.'* Tim Lang, Professor of Food Policy at City University

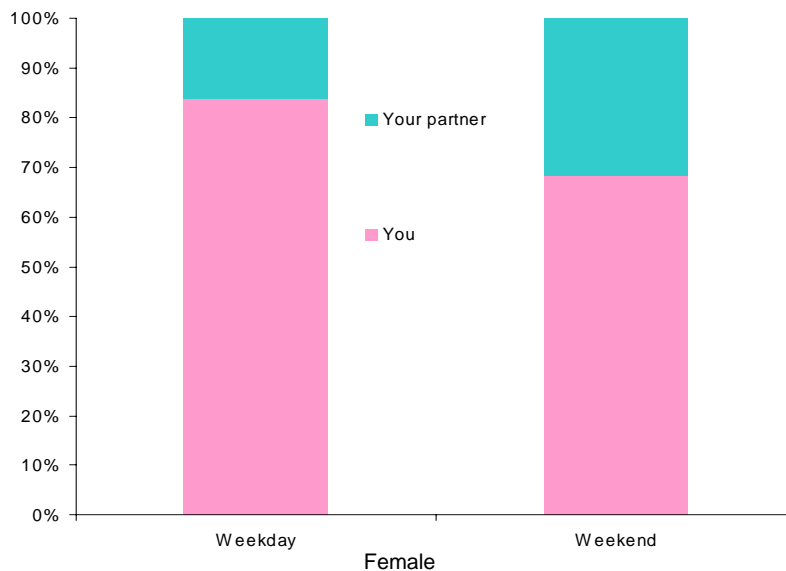
**Chart 8 Weekend breakfast as a luxury...**



Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

This also has an impact on which member of the household is then responsible for preparing breakfast. The research we conducted for Kellogg's shows that roles changed at the weekend. Among those who live with their partners, 16% of women claim their partners prepare breakfast during the week, which rises to 31% on the weekend.

**Chart 9 Breakfast preparation routines of those who live with their partners**



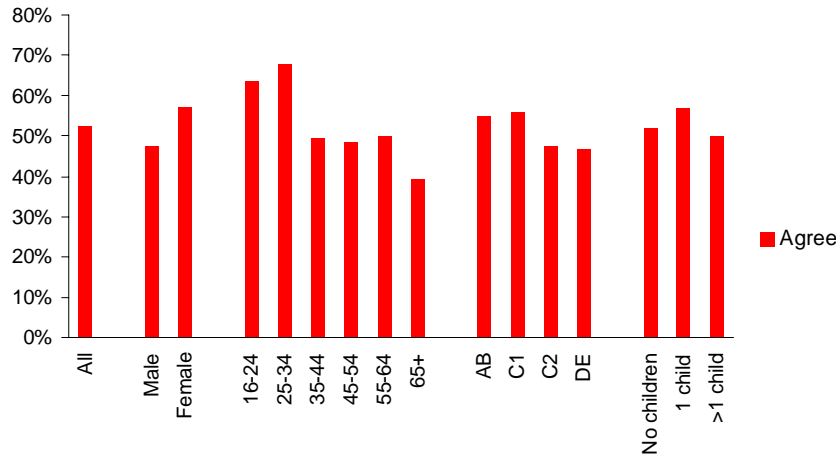
Source: Kellogg's/The Future Foundation Base: 321, aged 16+, those who live with partners, UK, 2008

### 2.1.3. Food as social signifier

As food increasingly becomes an aspiration, it is also becoming an important building block of social and cultural capital.

One of the most significant social changes in recent years has been our desire to express ourselves, through creativity, and new skills. While we were happy to express status through material possessions twenty years ago, this now seems less relevant. We are increasingly willing to express our place in the world through the experiences and skills we collect along the way - and one of these skills is in preparing food of the highest standard both for families and friends. Cooking has never seemed more interesting, and glamorous: over 61% of the women surveyed as part of this research project mentioned that they 'felt proud' to be able to share a recipe with others. Interestingly this trend is most apparent among younger groups - with 25 to 34 year-olds at the forefront. Regionally speaking, Scottish consumers are the least likely to agree (51%), while a substantial 56% of people based in the South feel gastronomic pride when passing on a recipe.

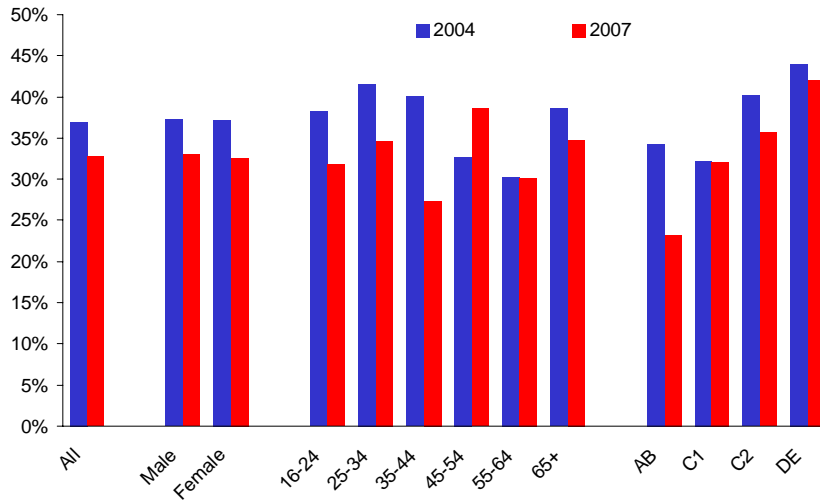
Chart 10 'I like to impress my friends or family when I cook'



Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

This is driven partly by a new appetite for a new form of formality, not the old-fashioned etiquette, but the pleasure in setting the table nicely, taking time to cook nice food, almost theatrically setting the scene for a quality occasion. Indeed, the research we carried out for this report shows that only 33% of people agree that meal preparation should be less formal and time consuming. It is also worth noting that this has decreased since 2004, particularly amongst younger people: a 7% decrease for 25 to 34 year-olds and a 13% for 35 to 44 year-olds.

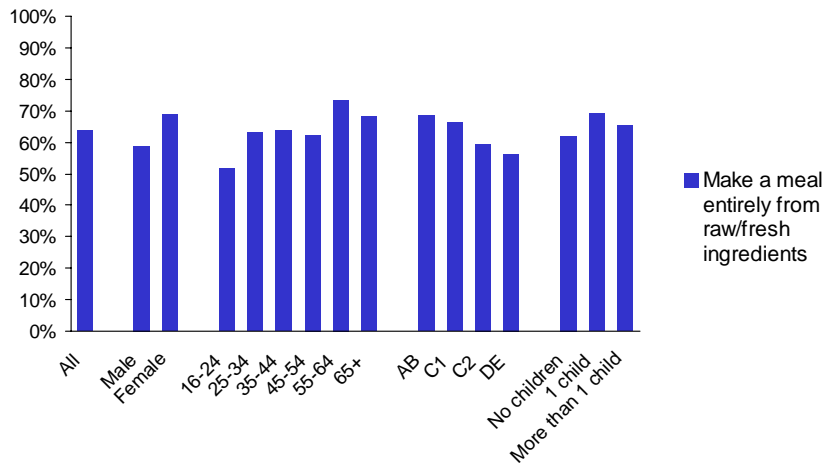
**Chart 11 Only 33% of people agree that meal preparation should be less formal and less time consuming, down from 37% in 2004**



Source: Kellogg's / Future Foundation Base: 1200 adults 16+, UK

Increasingly the ritual involves shopping and cooking from scratch. Our research shows that UK adults now make a meal from scratch three times a week compared to 2.5 times a week just four years ago.

Chart 12 Activities done on average at least three times a week

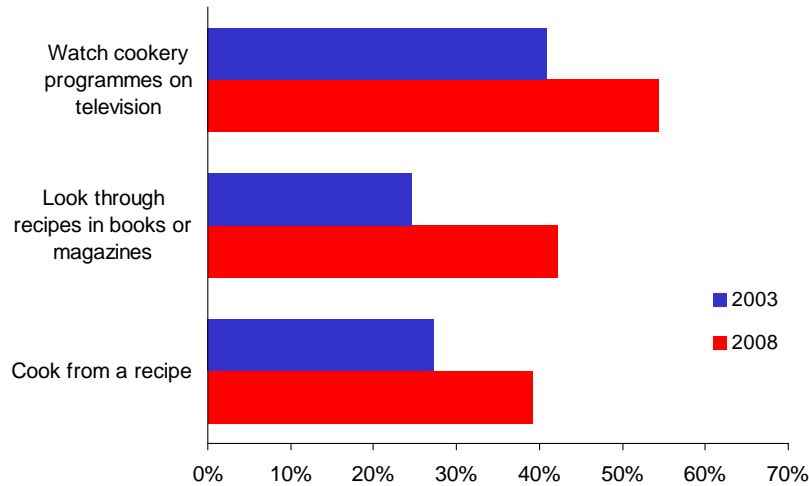


Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

What we're witnessing is that increasingly cooking matters, because it makes eating meaningful. Preparing food becomes an integral part of the experience, the quality of the food reflecting the quality of the experience. This in turn fuels our growing interest in gaining food knowledge, which explains to a large extent the success of celebrity chefs, and the high profile cooking now enjoys in the media.

Ever-greater importance is being placed upon eating 'proper' meals that have been prepared from scratch. What is proving very interesting is that as this renewed interest in the preparation of 'proper food' is not fully compatible with busier lifestyles, we are increasingly happy to 'cheat' a little! The recent success of Delia Smith's *How to cheat at cooking* recipe book is a telling example.

Chart 13 Activities carried out at least once a week



Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

## 2.2. Eating Out occasions

### 2.2.1. A quick fix for family-ness

Our interest in eating well goes beyond the home. An increasingly adventurous British public are eating out more often than they used to; in 2003 just over 40% of people ate in a restaurant once every month. This year the proportion is 50%.

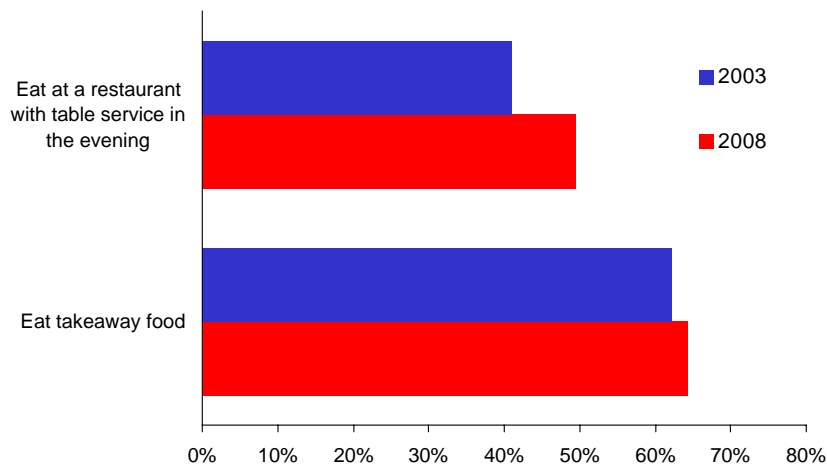
We've already commented on how skilful we've become at getting the most from our time. While this is driving the growth of convenience food, it is also driving our expectations of casual restaurants offers.

*"Traditionally when eating out you'd have to know the cutlery and you'd behave very differently from the way you would at home, whereas now with mid-way restaurants like Zizzi, it's not that same sense of occasion. You may not behave in quite the same way as you would have at home but there's a new mentality around that type of dining out. It's when you can't be bothered to cook. It's displaced cooking."* Emma Stiles, British Association for Applied Nutrition and Nutritional Therapy

This casual eating-out approach means that families can enjoy the ritual of eating together without the time penalty that comes with preparing your own food. Increasingly we perceive eating out as something that is unremarkable and everyday. There's an informality and a warmth about this sort of eating out that enhances the ritual of family dinners taken together. Among children this type of

dining is likely to influence their own attitudes, making it more likely that as they reach the family formation stage themselves, the importance – and enjoyment – of eating together will become part of their own parenting ethos.

**Chart 14 Activities done on average once a month**



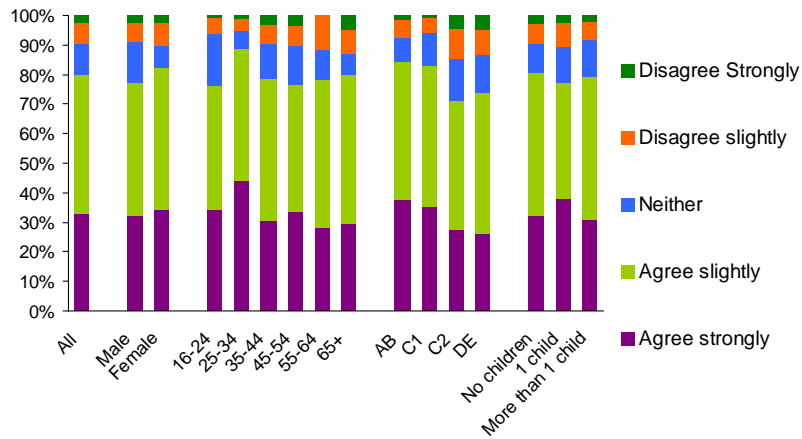
Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

### 2.2.2. Broadening our horizons

As mentioned in the previous section, few of us really take eating-out to be that special a treat any more. Leisure is ubiquitous, and increasingly we expect instant stimulation, innovation and originality from our dining experiences. This is raising our expectations in the range of foods that we eat, as well as the range of dining experiences we're keen to sample.

The research we carried out for Kellogg's shows that an overwhelming 80% of consumers are keen to try out food they've never tried before. The percentage is highest amongst 25 to 34 year-olds with 89% of people surveyed keen to try out new food. Regional variations are minimal: the desire for new culinary experiences is felt countrywide.

Chart 15 'I like trying out food that I have never eaten before'



Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

*"Multicultural feast days have become more influential in the last fifty years. We have Divali celebrations, we celebrate Chinese New Year, we have Saint Patrick's dinners, it's much more integrated."* Tamar Kasriel –Futurist, MD for Futureal

As the repertoire of cuisines and dishes that we enjoy continues to expand, and as we are exposed to more ethnic restaurants, this generation of young people will have much greater exposure to world cuisine than their parents did.

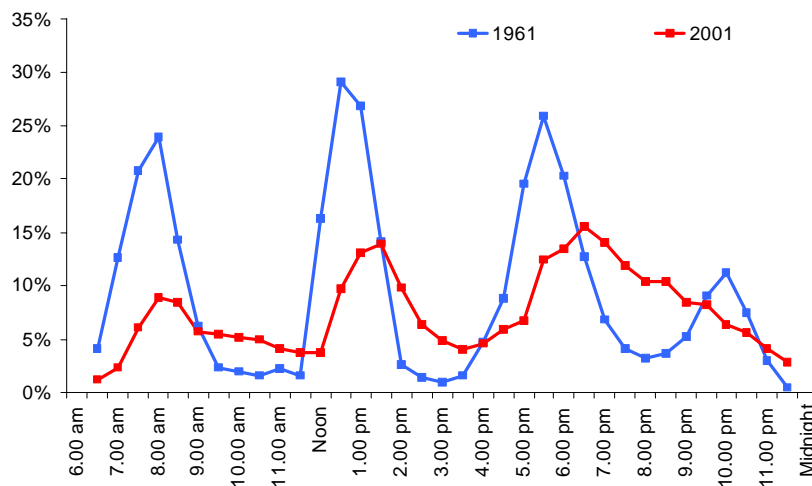
### 3. The management of time through flexibility

#### 3.1. The fainter food rhythm and flexible eaters

Eating in the UK today has become a more flexible exercise, reflecting a broader shift in the way that modern British consumers live their lives. Rigid 9 to 5 working structures are giving way to more flexible arrangements for many while commuting times, the school-run, growing leisure commitments and an ever-shrinking gender gap in the workplace place additional pressures on when, where (and with whom?) food appears in our lives.

**Chart 16 The rhythm of the food-eating day is getting fainter**

% eating or drinking, in or out of home, by time of day, all days, 7.00am to Midnight

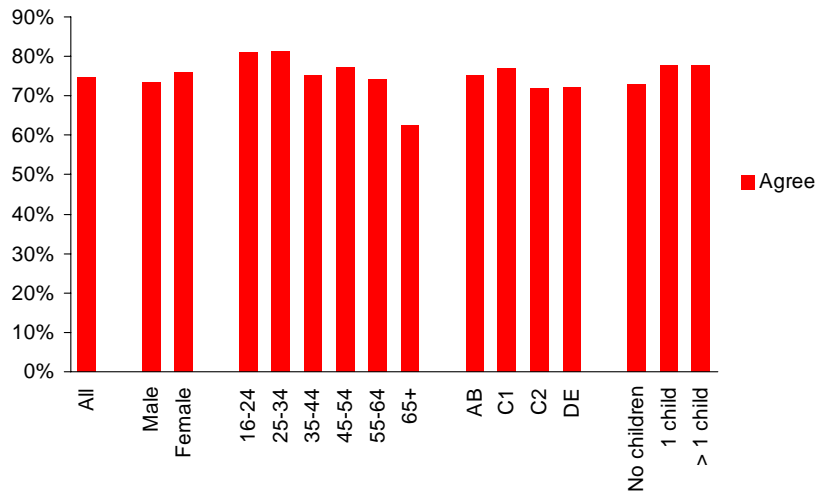


Source: BBC/National Statistics/nVision Base: 545/654 adults in households with children

To an extent, all mealtimes are more loosely defined than they used to be, as the old peaks of 8am (breakfast), 1pm (lunch) and 6pm (dinner) are replaced by a more even distribution through the day. The chart above reveals how, over a period of four decades, food eating no longer strictly conforms to a predictable pattern: rather, snacking culture – indulging hunger throughout the morning and afternoon – has become a defining feature of the modern day diet. As Julian Hunt of the Food and Drink Federation observes: “The peaks of breakfast, lunch and dinner are flattening, you can see that. So I think there is a very complex lifestyle issue before you can get into looking at diet...”

**Chart 17 The perception is that more of us are buying and eating breakfast out of the home**

'Nowadays, more people buy breakfast from a café than five years ago'

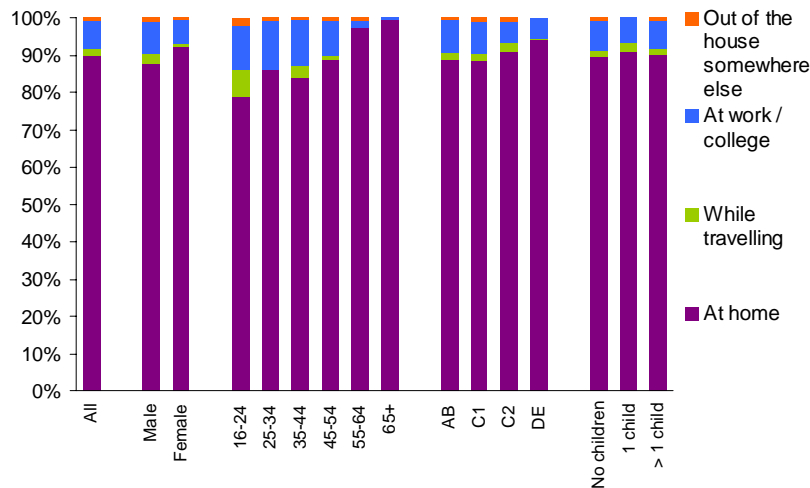


Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

How have breakfasts withstood the pressures of modern day living? It is interesting to note that, just as most adults assume families don't eat together as much as they used to (when in fact they do), three-quarters of us assume that more people are consuming breakfast out of the home than they did five years ago. This is a perception strongly felt across all demographic and socio-economic breaks, as revealed in the chart above.

Chart 18 9 in 10 consumers still eat breakfast at home

'Where do you normally eat breakfast during the week?'



Source: Kellogg's/The Future Foundation Base: 772 who eat breakfast at least 4 or 5 days during the week, aged 16+, UK, 2008

Once again it is the case that we are more traditional in our mealtime habits than we initially suppose. Our original research finds that the vast majority of breakfasts are sourced from within the home and, as the chart above reveals, of the 77% of us who regularly eat breakfast during the week, nine in ten breakfasts are eaten in the home.

However, with the eating day losing its traditional shape and consumer lifestyles in flux, our research suggests the traditional breakfast is evolving to reflect the more complicated world we now inhabit, with consumers welcoming a more flexible, ad hoc relationship with the food they eat. We speak here of the acceptance of snacking, younger generations adopting on the go breakfast habits and the rise of the earlier breakfast.

A culture of snacking has become ingrained in British consumer behaviour so that whilst 78% of consumers claim to regularly eat breakfast during the week, what constitutes the morning meal is increasingly open to debate.

To an extent, the idea of breakfast is becoming more vague and the distinction with snacking more and more blurred: 40% of consumers snack between 10am and 12pm during the working week, rising to half of 16-24 year-olds. More claim to routinely snack in the afternoon (between 2pm and 5pm), again rising significantly among the younger age cohorts. A surprisingly large proportion, one in ten consumers, claim to actively avoid lunch in favour of eating smaller meals throughout the day.

Snacking between mealtimes (at least three times a week) is a reality for 65% of Scots as opposed to only 55% of those living in the South of the UK. 43% of people based in northern regions tend to snack during the morning hours, compared with around a third of those living in the South: by the afternoon (2pm – 5pm), regional snacking differences have all but disappeared.

**Picture 1 Routine snacking is seen positively by many**

<p><b>“Eating small amounts of food regularly helps me feel awake”</b> - 41% of women agree</p>	35%
<p><b>“Eating helps me to concentrate on what I am doing”</b> - 45% agreement amongst 16-24s</p>	26%
<p><b>“Eating too much at lunch makes me feel sleepy”</b> - 76% of women agree</p>	73%

Source: Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

Crucially, where snacking was once deemed an unacceptable diversion from the three square meals of the day – with countless children told off for ‘ruining their appetite’ before their main meal – significant proportions of British consumers now see the habit in a positive light. With 56% claiming to snack between meals at least three times a week, a third claim that “eating small amounts of food regularly helps me feel awake” and 26% agree that eating “helps me concentrate on what I am doing”. Statements such as these support the idea that smaller snacking periods are undertaken with forethought, and are not necessarily borne out of lazy habits.

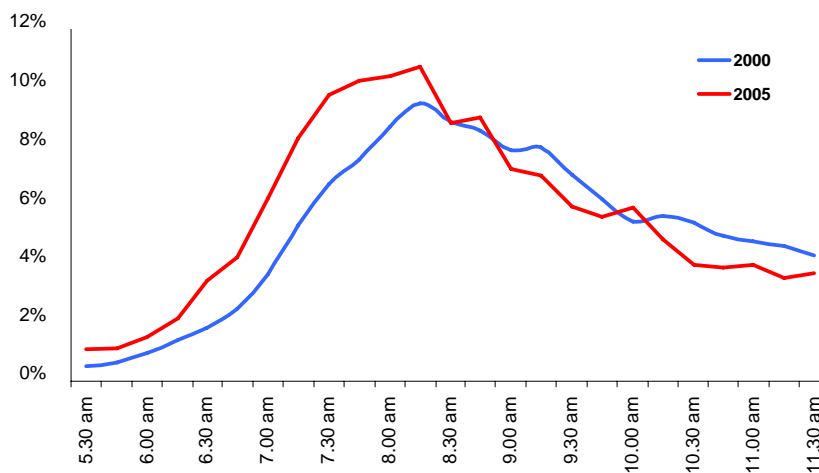
And women it appears, are especially conducive to daytime snacking: the schematic above shows 41% of women agree that ‘eating small amounts of food regularly helps me feel awake’ and 76% agree that ‘eating too much at lunch makes me feel sleepy’.

To study the more youthful age cohorts’ relationship with breakfast and eating in general provides us with a good indication as to how eating habits in the future could progress. Expect an affluent and educated generation seeking functionality in the food they eat and eager to invest in delineated, flexible mealtime solutions.

The 16-24 age group is the most likely to eat breakfast on the go, and 81% in the age group snack between meals regularly throughout the week (as opposed to a 56% national average).

**Chart 19 Over five years, people are eating breakfast earlier**

Percentage of people eating at different times in the morning on any given day



Source: OPCS Omnibus Survey, Time Use Module, ONS Time Use Survey, ESRC /Future Foundation

One significant change is that we tend to eat breakfast earlier than we used to. This reflects a number of things from the impact of more flexible working hours to busier commuter routes to the increasing tendency of parents to drive their children to school rather than the children making their own way. For some work starts earlier and for others gym visits may be part of a morning routine. Even at the weekend we tend to have breakfast earlier than we did at the turn of the century.

Interestingly, over 1 in 10 under 44s eat breakfast at work or college, revealing the arrival of the 'deskfast' in to the lexicon of ever-expanding consumer eating habits. Consumers living in the South are most likely to 'deskfast', with 10% eating breakfast at work or college. Those consumers living in Scotland are the most likely in the UK to eat their breakfast while at home.

With breakfast becoming a cloudier concept in terms of time (beginning earlier in the morning and stretching in to the day through snacking) and in terms of its location (younger generations keen to take it on the go and the prevalence of 'deskfasts'), breakfast is adopting the mould of modern British society.

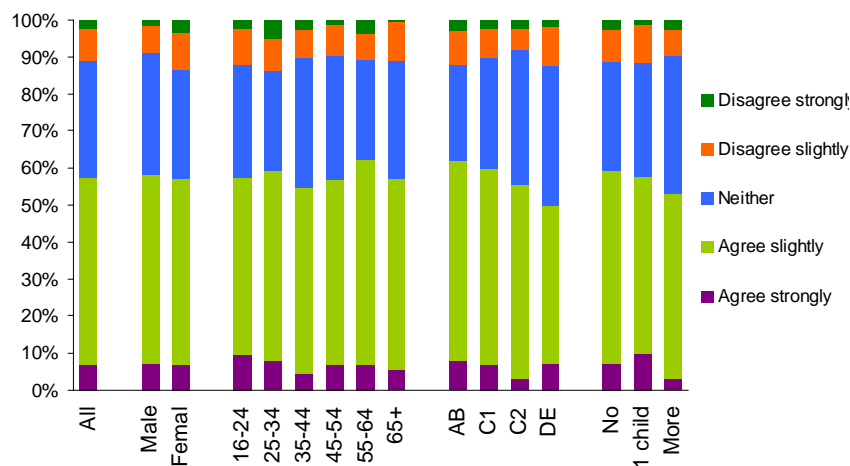
We are faced with a population at ease with functional food relationships and eager to adopt flexible eating patterns. During the working day, the traditional food 'event' loses its importance as we shuffle around our eating habits to suit the pace of life, our deadlines and our temporary needs. A fitting point was raised during the Future Foundation expert dinner: "Food stops becoming something you do [as an] 'event', its just something you do with while doing something else and it completely changes the way you consume it".

### 3.2. Convenience in a time-poor, expectation-rich world

With ongoing demands for food flexibility and an entrenched snacking culture in the UK comes a heightened expectation amongst consumers of food convenience and speedy dining. We have spoken of the increasing appeal of 'foodie' experiences to a growing body of affluent consumers, keen to gain social capital and knowledge from 'scratch' cooking. However, in most day-to-day cases consumers seek compromise and a solution to time-poor, expectation-rich situations.

With the release of Delia Smith's latest offering, 'How to Cheat at Cooking', we are reminded that food convenience is a vital pull-factor for the UK consumer. Whilst adventurous culinary exploits and an appreciation of family meal times continue unabated, the British consumer appears to have no qualms about entering the convenient, pre-prepared food world.

Chart 20 Some pre-prepared food is healthy



Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

There is also, argues Natasha Finlayson, not necessarily an assumption that food cooked from scratch will be healthier than pre-prepared food: "Cooking doesn't mean healthy food. It's what you buy and

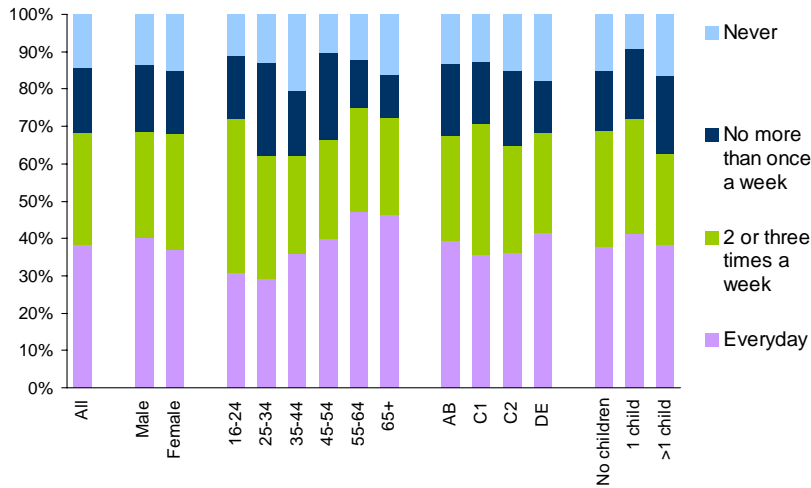
how you cook it..." The consumers we asked agreed with this view; over 50% agreed with the statement "some pre-prepared food is healthy", as shown in the chart above. 58% of consumers living in the South agree with the statement. Readily prepared foods perform a valuable role in saving time; time that can then be re-invested elsewhere. Meals that are quick to prepare and which are healthy are understandably popular with parents and are taking a more prominent positioning on supermarket shelves.

Tamar Kasriel, MD of Futureal agrees that convenience foods are not unhealthy in themselves, rather it's how people choose to use them and the context in which they are used that's important: "...healthy eating is not cooking necessarily... I think the social environment around food has changed enormously and that comes back to the single life of eating on your own in front of the telly. I think the social aspect of food compared to the healthy aspect of food are two very different things." In other words it is often the case that when people – and families in particular – eat together the importance of the ritual means that health tends to be a bigger consideration.

The enduring power of cereals as convenience king at the breakfast table is crystallized in the fact that over two-thirds of consumers eat cereal at least two to three times every week. A higher proportion of elderly consumers eat cereals regularly in the week, echoing what we mentioned earlier: that younger, mobile cohorts are more likely to snack on lighter, more on-the-go items that require little preparation. Following taste as the most important reason for eating cereal – a crucial factor in itself – a third of consumers choose cereal over competitor foodstuffs for its time-saving benefits, suggesting breakfast cereal – and its variant sister products – is on-trend in a weekday food environment demanding flexible, convenience-driven offers. (Relevant charts displayed below).

Chart 21 68% of consumers eat cereals at least 2-3 times a week...

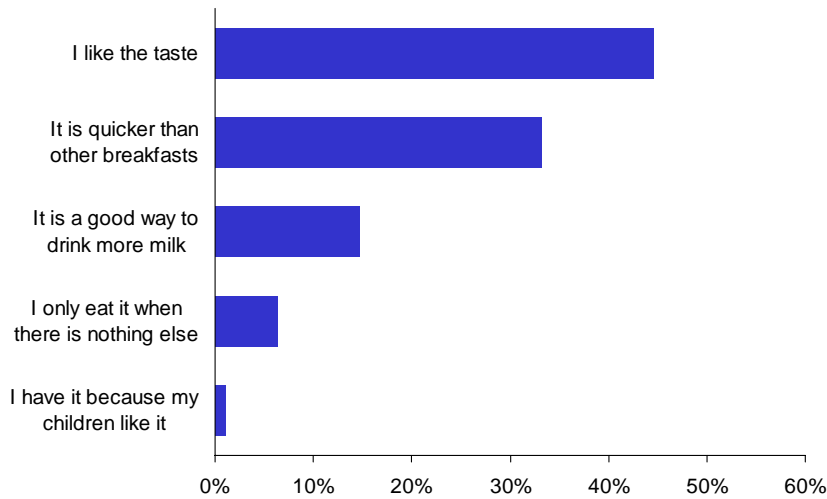
'How often do you eat cereal for breakfast?'



Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

Chart 22 ...with taste and convenience cited as the main reasons

'On the days that you do eat cereal, what is the most common reason why you decide to?'



Source: Kellogg's/The Future Foundation Base: 1,000 aged 16+, UK, 2008

## 4. Conclusions and implications for the future

The changes described in this report have been driven by large social trends that we have been tracking for many years. Understanding the way they will develop in the future offers the most reliable way to predict how our eating habits will change. No doubt, other unpredictable fads and fashions will come and go. But, as we have made clear in this report, long-term changes in eating habits depend on the mutual relationship between food and society. Social structures tell us about food just as people's attitudes towards food tell us about what is happening in society.

At root, many of these trends are connected to the great rise in affluence since the fifties. As the recent 50 year analysis from the ONS shows, this has had a direct effect on the economics of food consumption: in 1957, food and non-alcoholic drinks accounted for one-third of the household budget; today, that figure has fallen to 15 per cent<sup>2</sup>.

The rise in affluence has not just made food proportionately cheaper; it has also wrought dramatic cultural changes that have, in turn, changed our eating habits. Aspirations have expanded and people's expectations of what counts as "the good life" have grown richer and more culturally sophisticated. People have got used to making progress every year. The trajectory of this consumer revolution means that even if food prices rise or income growth slows, we can expect these increasing aspirations to continue to drive change.

During the same period, social structures that used to determine people's lives have become much less rigid. The nuclear family is now just one option among many. People have more options and are finding new ways to live together that do not depend upon what they "have" to do but, rather, upon what makes sense in their particular circumstances. We expect that this process, in which old structures are broken down and connections are remade in new ways according to people's priorities, will continue in the years to come. Every year, society is becoming more and more comfortable with flexibility.

These two great forces lie behind the more specific social and cultural changes described in this report. Here we go through them in turn and consider how they make affect food habits in the next five years.

### 4.1. The experience economy

Affluence, coupled with the easy availability of consumer goods, has led British consumers to increasingly define themselves by what they do, rather than what they buy. This is reflected in analysis of our Changing Lives survey which shows that consumers increasingly prefer to spend money on things that give them temporary enjoyment, rather than on things they can keep.

We might say that this first wave of the experience economy has brought us to where we are today. Rather than collecting consumer goods, people collect experiences. They go to a gig, watch a match,

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<sup>2</sup> ONS – celebrating 50 years of family spending

go skiing or diving, or, as in this report, seek out particularly fine eating occasions. The important thing is to have the experience, do it right, and tick it off the list of what you aspire to have in your “good life”; that which differentiates you from others.

We can see in the report that people aspire to eat in particular, often quite traditional ways. In part, this is because they enjoy it; we have suggested, though, that the experiences also have a function in this *experience economy*. Activities like buying fresh ingredients, cooking from scratch, and eating together in a “family way” are cultural signifiers that are part of the way that people build their identities. The argument goes that in recent years these experiences have become increasingly ritualised so people can confirm that they are doing it right. One of the implications is that we expect, over the next five years, a growing emphasis on quality over quantity: this will mean that some people place even more importance on finding time to shop, prepare, and collect gastronomic knowledge.

It is not clear, however, whether these “experience oases” will increasingly emphasise “correct” etiquette or whether people will seek to show how comfortable they are around food by relaxing the rules completely and running the risk that no one knows it is a special event.

Most likely, both will happen. A tribe of neo-Victorians will obsess over passing the port properly and re-enacting Japanese tea ceremonies. At the other extreme post-Jamie bean-bag gourmands will cook for four hours and serve it in a pot on the floor. The tribes may be small but colour supplements and newspapers will make sure their influence is felt across the UK. These caricatures will almost certainly exist together with a plethora of ‘tribes’ between the poles.

#### 4.2. The importance of “Having it all”

As the report makes clear, much of this perceived time pressure come from the fact that we now fit far more into our leisure time than we did in the past.

This has places contradictory pressures on food. On the one hand, during food leisure occasions, like a long family meal, it emphasises the importance of food and food preparation and encourages people to spend time on it. On the other hand, when food is just a means to an end, the time available is going to have to be squeezed. Indeed, as the title of the report has it, people are going to have to *eat fast food to make time to eat slow food*.

We expect that as the *experience economy* becomes more sophisticated this pressure will increase. No matter whether people pursue a number of different leisure activities or concentrate on getting better at one thing, they will likely want to spend more time on leisure. Clearly, if people are going to accommodate such increases they are going to have to make adjustments to other parts of their lives.



### 4.3. Competence

The evidence suggests that people are responding to higher expectations and increased time pressure by getting better at managing their lives.

In one sense this means that we are simply able to fit more in than in previous years; in another, it points to the fact that people seem to be becoming more adept at switching between roles depending on the occasion. When required, people are living quickly, flexibly, and efficiently. When time allows, however, they are declaring “family meal time” and are not letting busy-ness intrude.

Over the next five years, then, we expect people will get even better at focussing their time on what they think is important. On the whole, parents will spend even more time with their kids. And when they cook they will do it better and take it more seriously. As we have already said, though, something is going to have to give:

- More knowledgeable about food: We expect that busy professionals will share knowledge about food as fuel i.e. nutrition and energy release. To a certain extent, food innovation will be driven by the needs of this wealthy and demanding group.
- “Convenience” will become even more important: We have already seen this with a growing acceptance of pre-prepared foods but people will look for it elsewhere, particularly if foods can be used to trade up the “value” of a staple food: e.g. blueberries on oats. “Nutritional Value for effort” will become a very important food attribute.
- The rhythm of regular mealtimes will continue to fade out: Breakfast, lunch, and dinner – will only apply if people are planning to eat together; when people eat alone they will eat when they get hungry. Breakfast will still be important, however, as it provides a guarantee of minimum nutrition and energy for the day and can be eaten quickly at home. It represents good “value for effort”.

More “dining down”: The mid-market restaurant will be seen more and more as a convenient meal solution rather than a treat. Upmarket consumers will continue to “dine down” in increasing numbers on the occasions that they do not have the time or inclination to perform the family meal ritual at home.