



FUTURE FOOD

BRINGING TRENDS TO THE TABLE

Good
Sense
Research.

+ **tfp**



Future Food Trend Tracker

January 2021 –
January 2022





BRINGING TRENDS TO THE TABLE

Good
Sense
Research.

+ tfp

WHO ARE WE?

Essential food trend foresight,
grounded in consumer
readiness insight.

An exciting collaboration between
thefoodpeople & Good Sense Research
in partnership with HRC, IFE and
Speciality & Fine Food Fair.

thefoodpeople...

We're a united team of trend spotters and innovators. A team of chefs, psychologists, marketers, product developers, academics, nutritionists, flavourists, historians and anthropologists.

But more than that, tfp are **champions of change**.

Our food and drink foresight is powered by our inherent experience, an obsession for food and drink, intuition, tenacity and natural curiosity.

This is underpinned by our vision '**to shift the future of food and drink by harnessing the power of trends.**'

Why? '**To shape a better future across society.**'



Good Sense Research...

An industry defining, **customer-led research company** with a **progressive approach** to make consumer insight count.

We have an **engaging personality** and **loyal client base** built across all UK **food and beverage** categories, with expertise in both **retail and food service**.

The Tracker...

What **Future Food** has set out to achieve is to demonstrate the relationship between future trend predictions and customer acceptance, readiness, and importantly how that manifests over time.

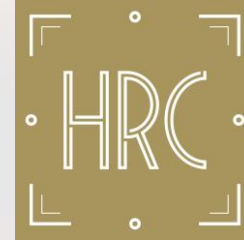
This longitudinal study will be reviewed over the coming months and years to provide the food industry with meaningful insights that will make a difference to understanding where trends and consumers are heading collectively. Initially we have chosen two very hot topics to bring to the table in the first instance - **sustainability** and **cuisines**.

The survey is sent to the Good Sense Research nationwide community each month.





The Industry Experts...



The tracker includes insights from our 'Industry Experts' panel who are members of HRC, IFE and Speciality & Fine Foods Fair. During lockdown this information was not tracked due to the hospitality sector being closed, but since July this important element of our tracker has been re-introduced.

The Experts are **knowledgeable** and **influential people** in the food and beverage industry, including chefs, buyers, nutritionists and restaurant managers.

January's Key Insights

#Insight 1 (Slide 10 to 13)

Less consumers appear to be eating all meat based dishes at home, at restaurants, takeaways and on the go. This was expected with Veganuary encouraging consumers to try more plant based meals.

#Insight 2 (Slide 15)

Since the beginning of the tracker in January 2020 the importance of sourcing locally, sustainably and seasonally, has become more important.

#Insight 3 (Slide 16)

Over 2021 consumers appear to be more open to the all aspects of meat and fish, due to increasing awareness of product wastage.

#Insight 4 (Slide 21)

Consumers awareness and interest in using 'neighbourhood' chefs has increased significantly. This is inline with consumers appeal in locally sourced products also increasing. During COVID there was an increase in consumers willingness to support local which has been represented in the tracker.

#Insight 5 (Slide 27)

Although restaurants are back and at nearly full capacity, consumers appeal in meal kits and part prepared meals has remained stable. These more efficient and time saving meals for consumers are still in high demand.



**FUTURE
FOOD**

BRINGING TRENDS TO THE TABLE

**Good
Sense
Research.**

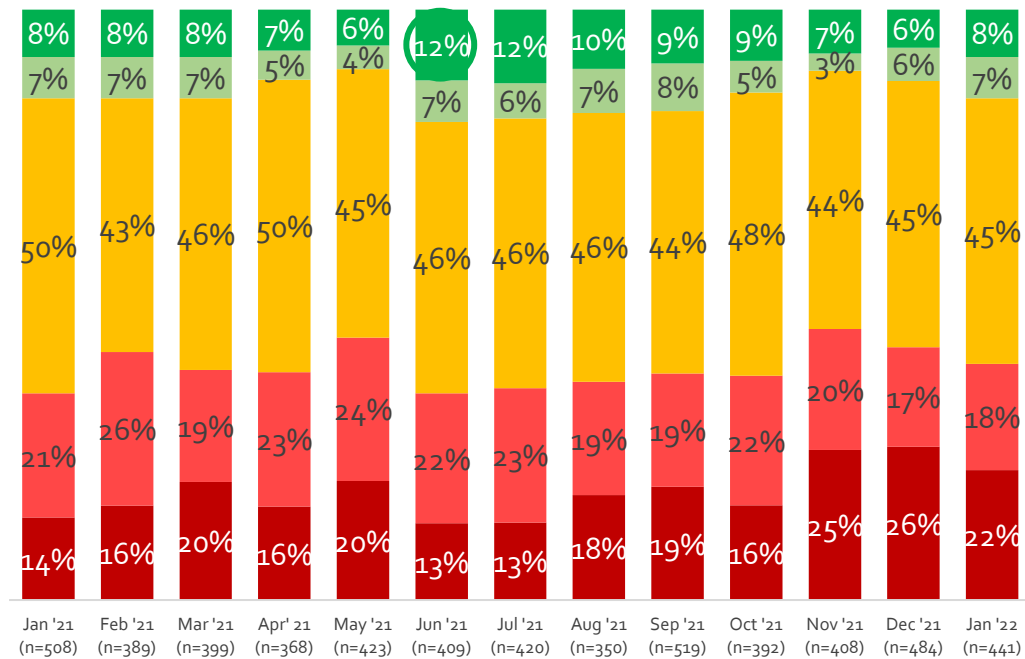
+ tfp

Plant-based eating

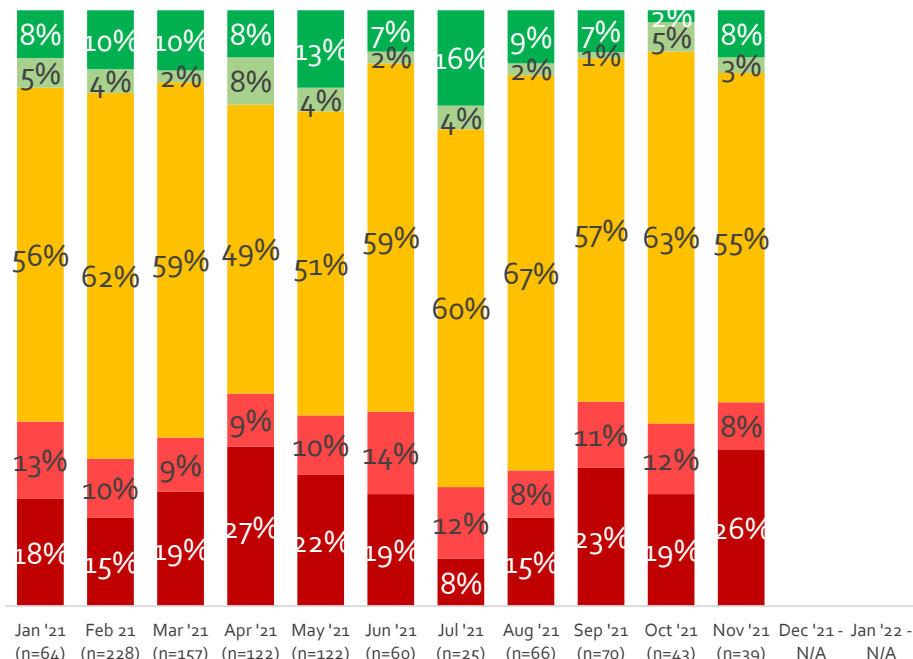
In January we continue to see consumers shifting away from a mainly meat based diet when eating at home. Veganuary seemed to have little impact on this. Could this be because plant based is less of a novelty and is catered for all year round.

Eating at home

Consumers



Experts



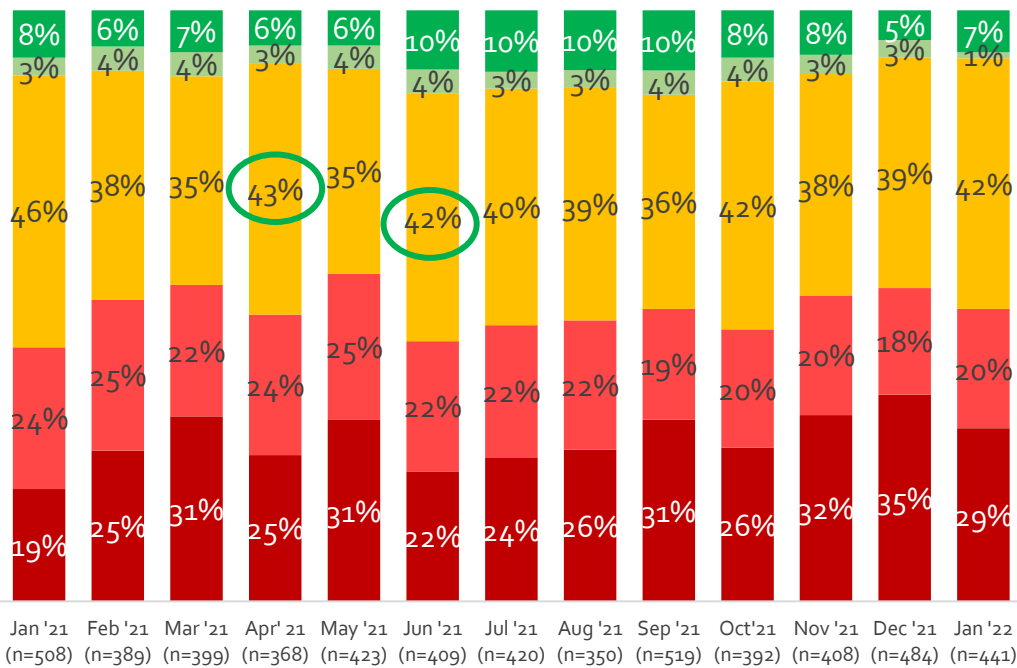
5. Only plant based 4 Half plant based/ half meat based 2 1. All meat based dishes

Month-on-Month significantly higher at 95% confidence

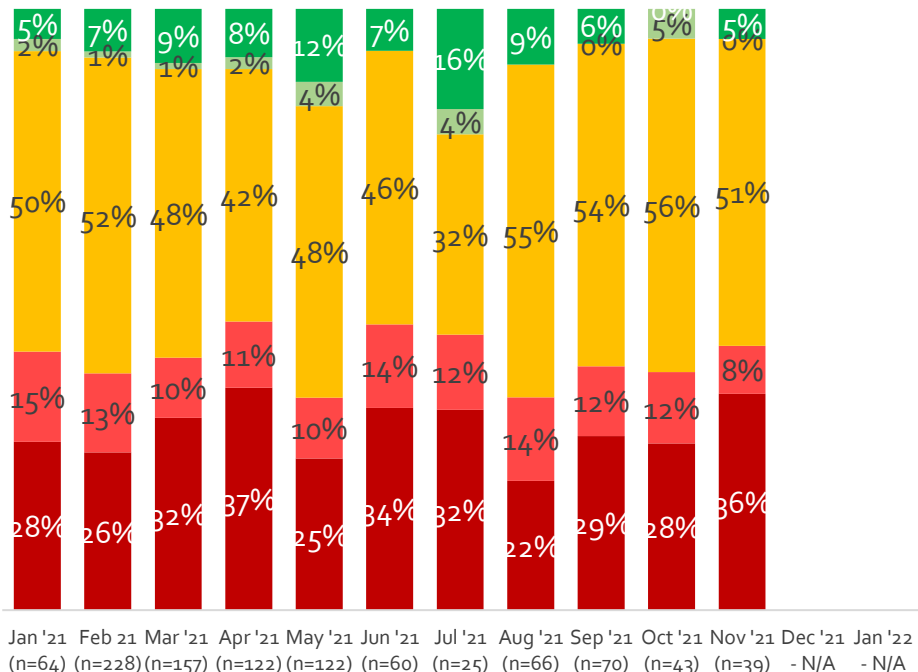
When eating out those eating plant based and meat based dishes has remained stable in January and does not appear to have been impacted by Veganuary.

Eating at restaurants/ordering from restaurant delivery service

Consumers



Experts



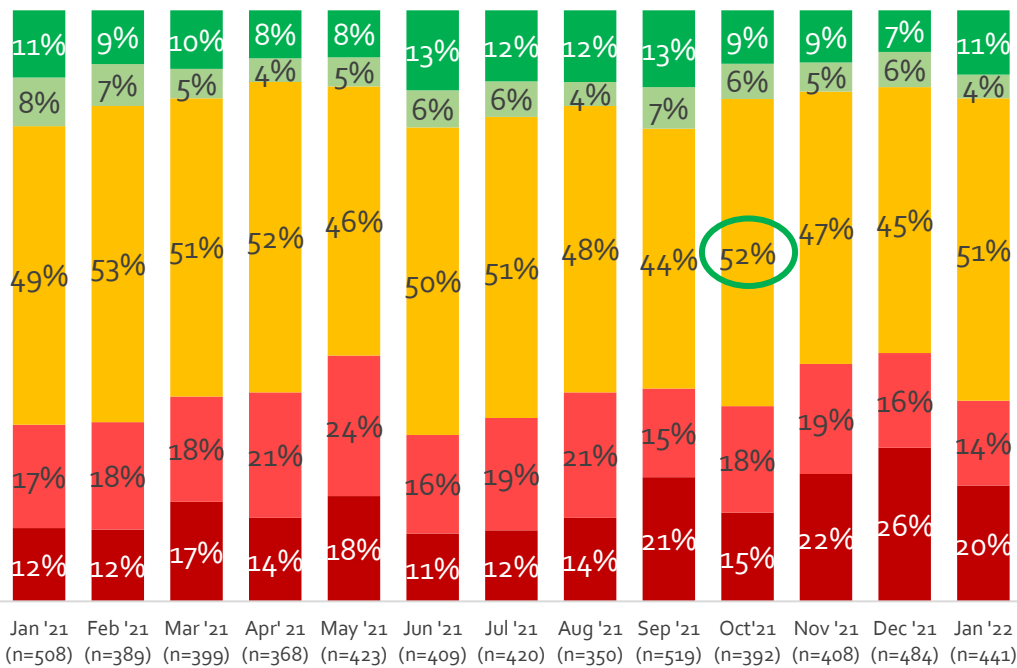
■ 5. Only plant based ■ 4 ■ Half plant based/ half meat based ■ 2 ■ 1. All meat based dishes

Month-on-Month significantly higher at 95% confidence

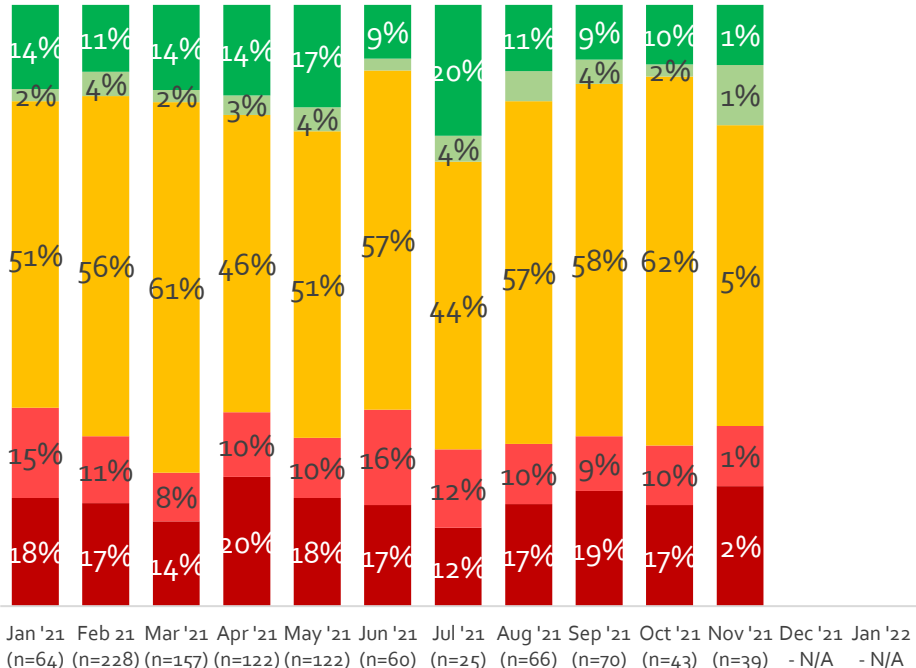
More plant based dishes were chosen when eating 'Food on the Go' compared to in December when health is less of a priority for consumers.

Eating 'Food on the go'

Consumers



Experts



■ 5. Only plant based ■ 4 ■ Half plant based/ half meat based ■ 2 ■ 1. All meat based dishes

Month-on-Month significantly higher at 95% confidence



**FUTURE
FOOD**

BRINGING TRENDS TO THE TABLE

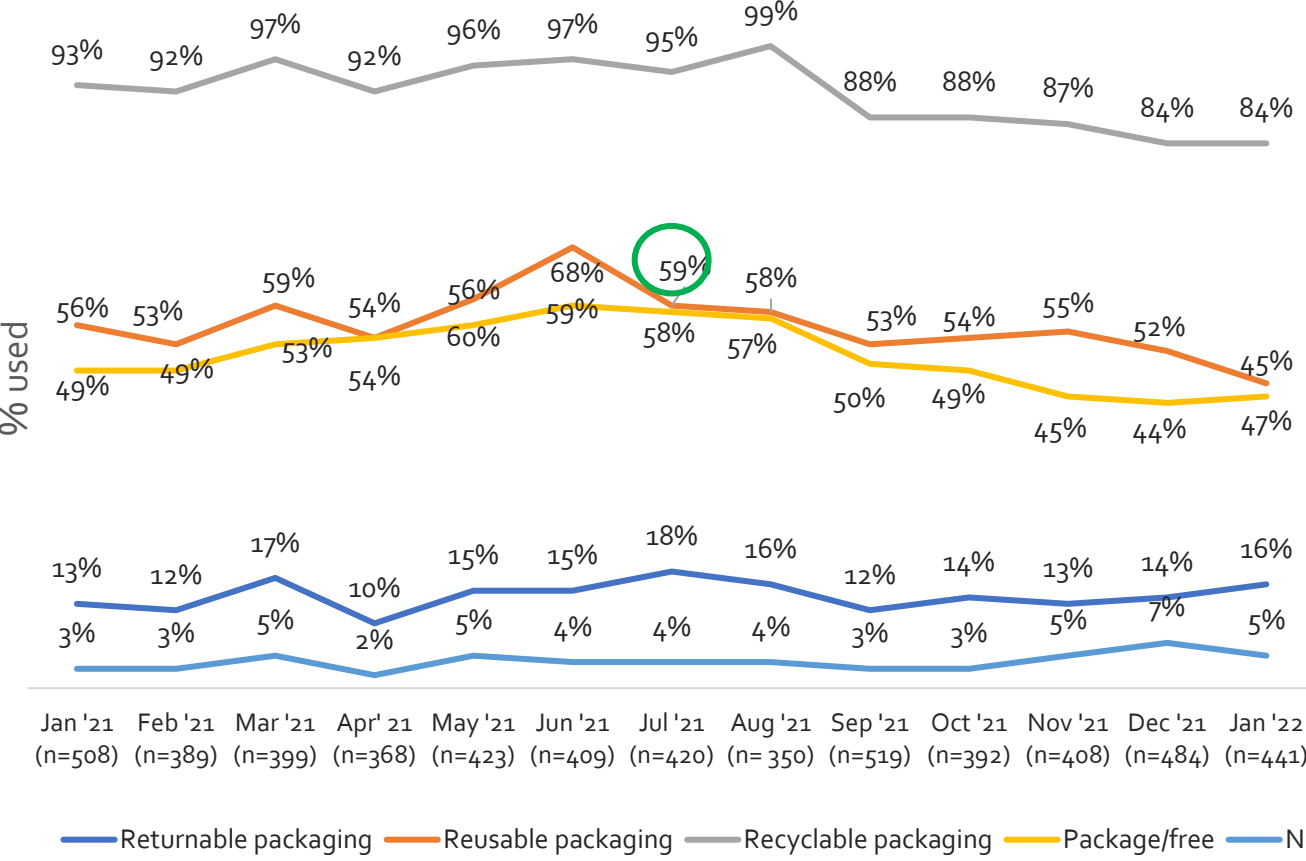
**Good
Sense
Research.**

+ tfp

Packaging and Sustainability

Over the past 12 months a fairly consistent trend line has been seen for the types of packaging used by consumers.

Consumers - Types of packaging used



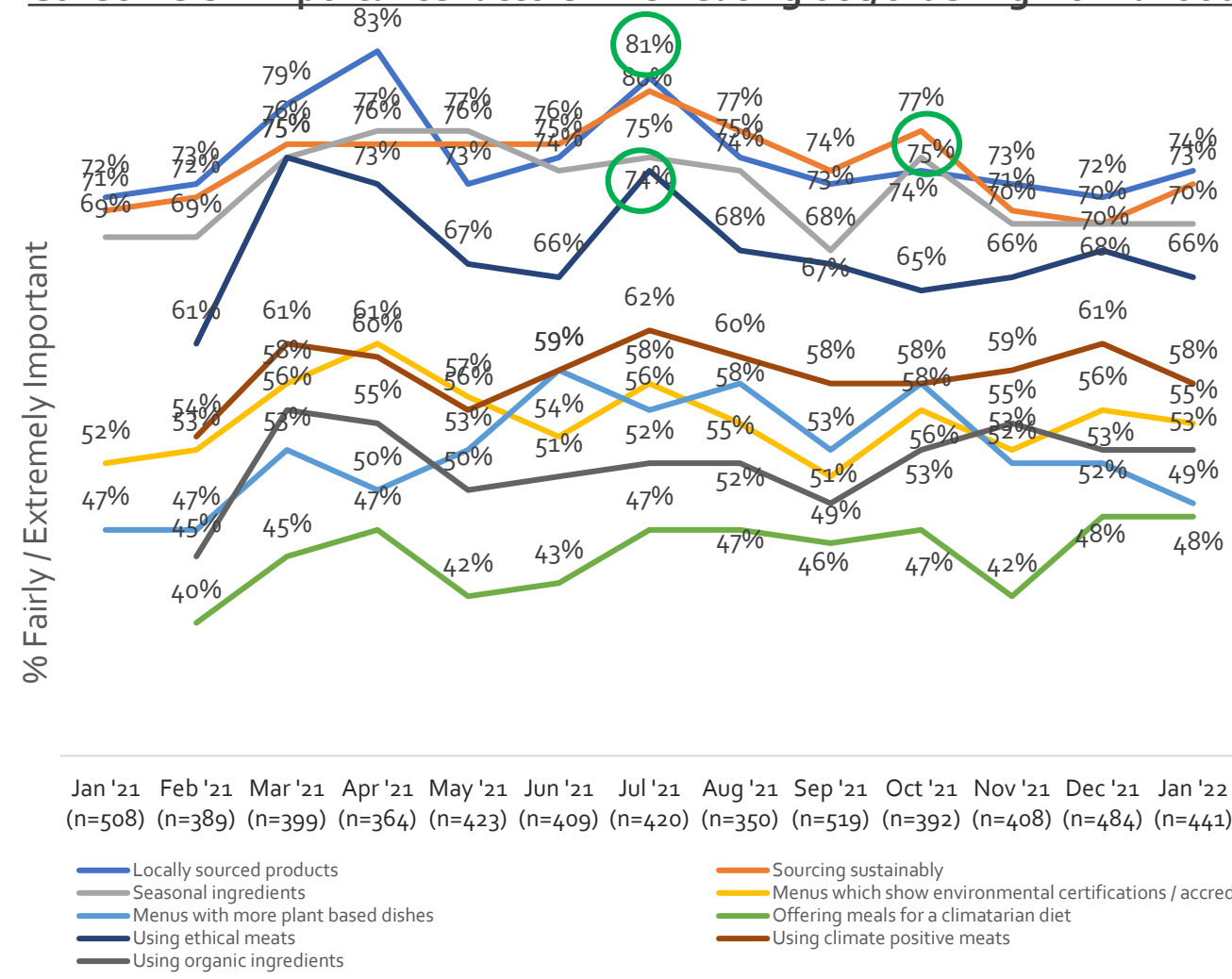
Experts

Jan '21 (n=64)	Feb '21 (n=228)	Mar '21 (n=157)	Apr '21 (n=122)	May '21 (n=122)	Jun '21 (n=60)	Jul '21 (n=25)	Aug '21 (n=66)	Sep '21 (n=70)	Oct '21 (n=43)	Nov '21 (n=39)
87%	88%	92%	86%	85%	90%	76%	85%	87%	86%	87%
56%	58%	55%	59%	58%	49%	52%	59%	50%	49%	56%
48%	53%	50%	56%	44%	44%	48%	55%	47%	58%	38%
16%	19%	11%	11%	16%	20%	8%	14%	10%	12%	15%
5%	2%	1%	2%	2%	0%	0%	6%	4%	5%	3%

Month-on-Month significantly higher at 95% confidence

Year-on-year the importance of sustainability in the hospitality sector has remained relatively stable. The importance of climate positive meats, meals for a climatarian diet, organic foods and ethical meat continue on a steady upward trend.

Consumers - Importance factors when eating out/ordering from a food delivery service

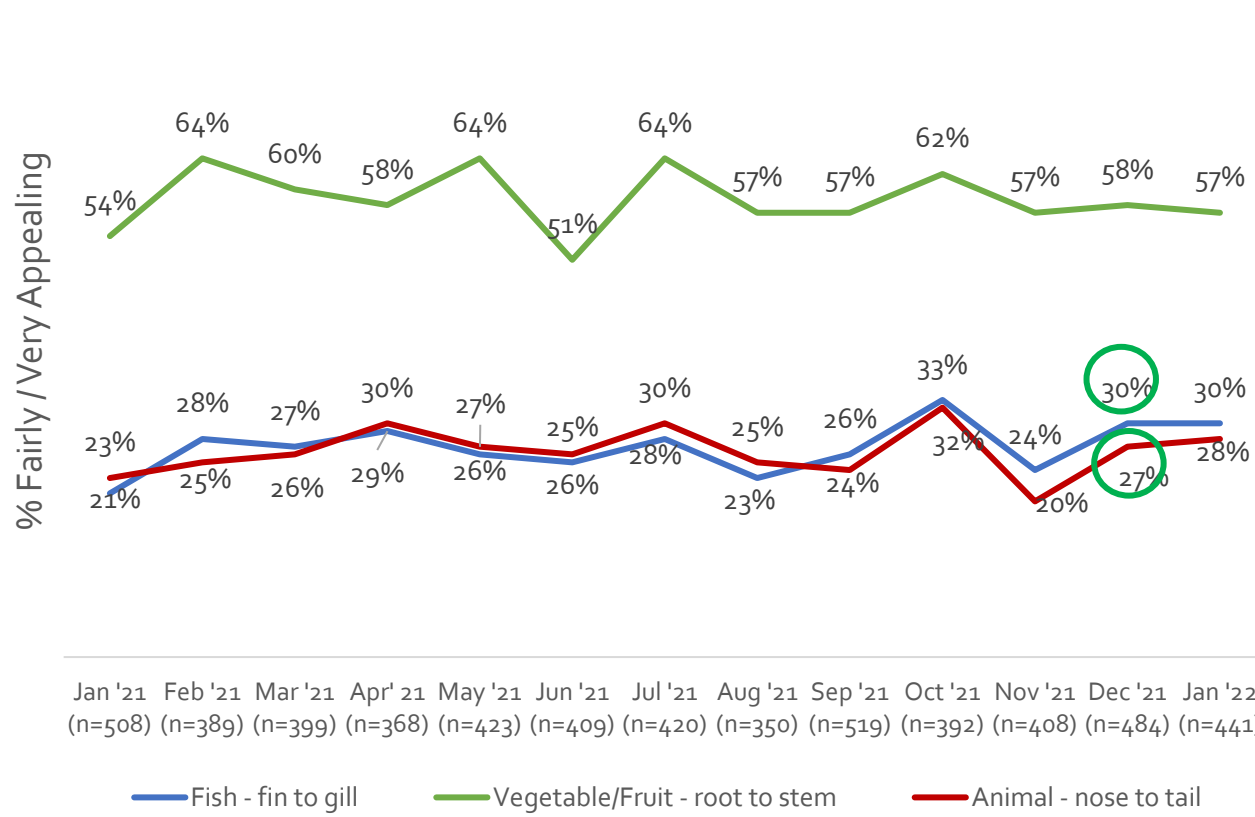


Experts (Fairly/Extremely important)										
Jan '21 (n=64)	Feb '21 (n=228)	Mar '21 (n=157)	Apr '21 (n=122)	May '21 (n=122)	Jun '21 (n=60)	Jul '21 (n=25)	Aug '21 (n=66)	Sep '21 (n=70)	Oct '21 (n=43)	Nov '21 (n=39)
81%	79%	79%	85%	81%	77%	96%	90%	79%	81%	74%
82%	81%	83%	83%	75%	78%	88%	87%	80%	79%	72%
88%	80%	78%	82%	79%	77%	88%	93%	77%	87%	84%
	74%	72%	76%	73%	77%	92%	76%	74%	75%	67%
	65%	65%	60%	57%	58%	80%	68%	59%	61%	51%
70%	58%	57%	62%	62%	54%	68%	56%	57%	65%	57%
	44%	48%	45%	51%	42%	72%	46%	44%	61%	43%
51%	54%	46%	47%	52%	41%	68%	56%	46%	44%	51%
	46%	49%	46%	44%	36%	76%	47%	44%	47%	33%

***New from February 2021**
 ○ Month-on-Month significantly higher at 95% confidence

Significant increases have been recorded in the last 12 months and month-on-month in the proportion of those being open to using all aspects of fish and meat products.

Consumers - Appeal of using all the produce –
fish/vegetable/animal



Jan '21 (n=508) Feb '21 (n=389) Mar '21 (n=399) Apr '21 (n=368) May '21 (n=423) Jun '21 (n=409) Jul '21 (n=420) Aug '21 (n=350) Sep '21 (n=519) Oct '21 (n=392) Nov '21 (n=408) Dec '21 (n=484) Jan '22 (n=441)

Fish - fin to gill Vegetable/Fruit - root to stem Animal - nose to tail

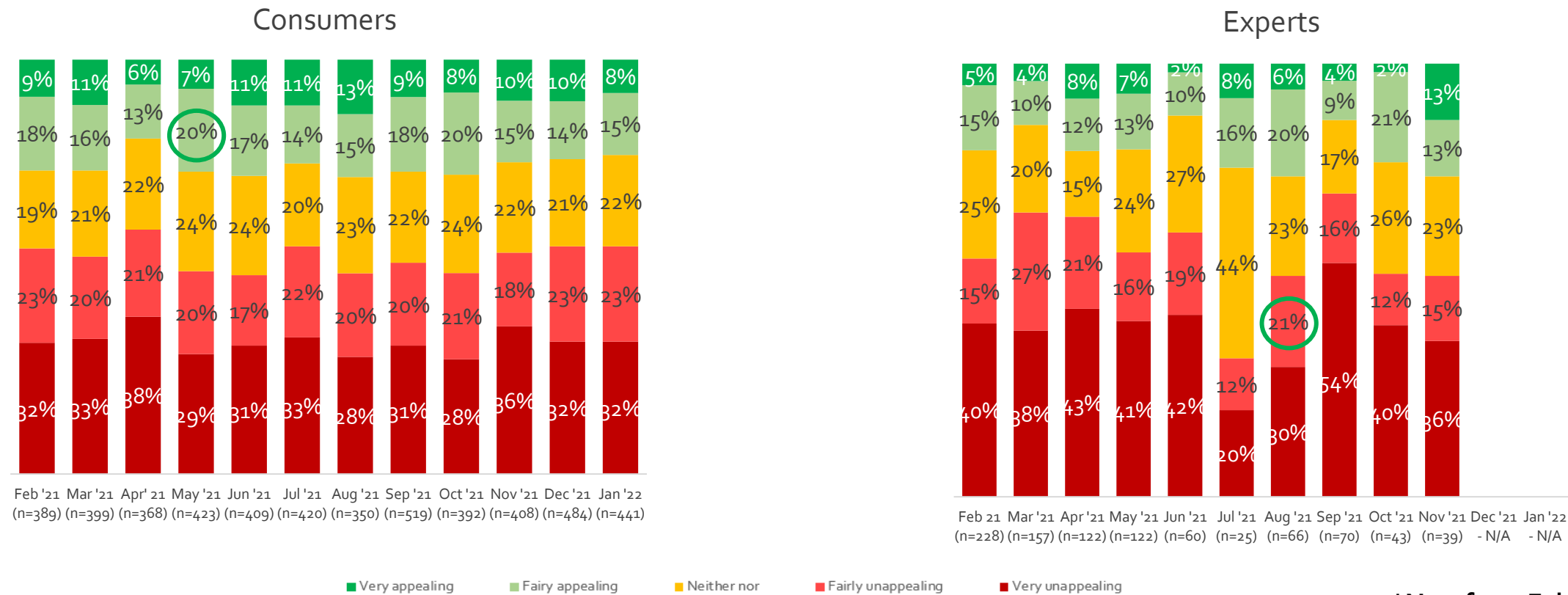
Experts
(Fairly / Very Appealing)

Jan '21 (n=64)	Feb '21 (n=228)	Mar '21 (n=157)	Apr '21 (n=122)	May '21 (n=122)	Jun '21 (n=60)	Jul '21 (n=25)	Aug '21 (n=66)	Sep '21 (n=70)	Oct '21 (n=43)	Nov '21 (n=39)
68%	74%	68%	76%	66%	55%	80%	76%	69%	75%	64%
50%	47%	42%	44%	41%	36%	48%	47%	35%	52%	43%
56%	52%	40%	53%	49%	46%	44%	47%	46%	49%	46%

Month-on-Month significantly higher at 95% confidence

Consumer openness to restaurants using lab grown meat remains polarising with more still finding this unappealing.

Appeal of restaurants that use 'Lab Grown Meat'



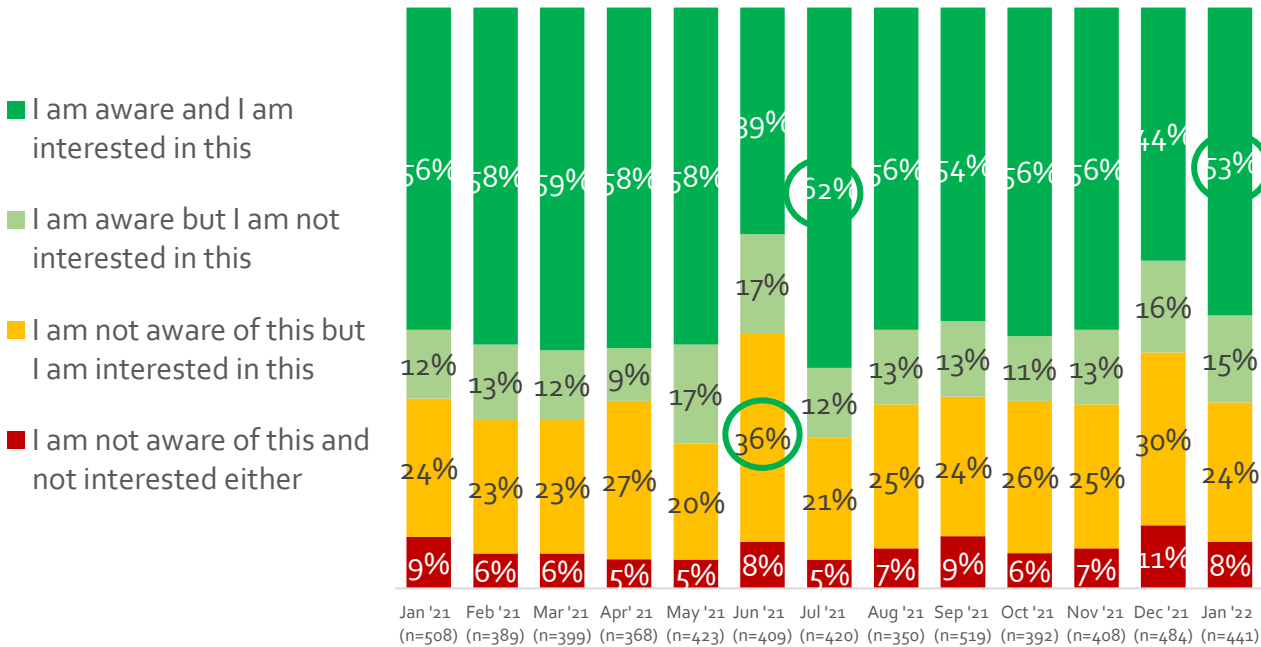
*New from February 2021

Month-on-Month significantly higher at 95% confidence

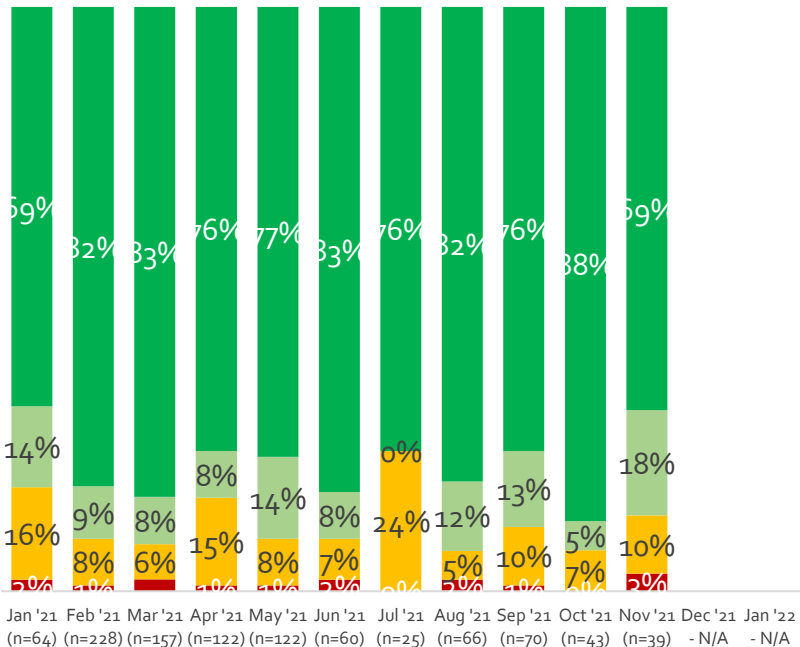
The proportion of those 'aware and interested' in shorter seasonally abundant menus returned to levels previously seen before the festive period.

Having shorter seasonally abundant menus

Consumers



Experts



Month-on-Month significantly higher at 95% confidence

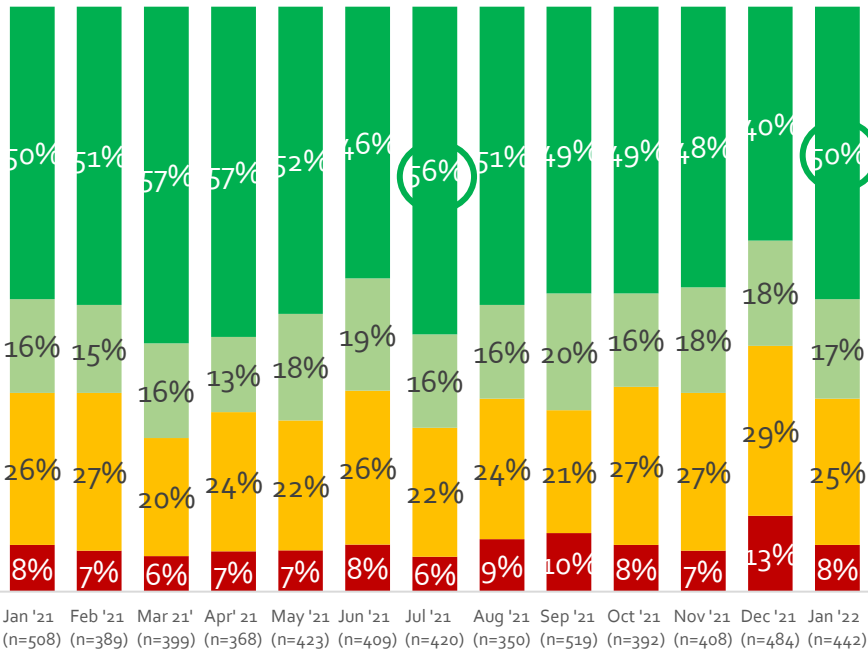
Q9. Now thinking about eating out which statement best describes how you feel about each of these initiatives

And this was a similar story for those 'aware and interested' in venues having farm/estate branding on their menus.

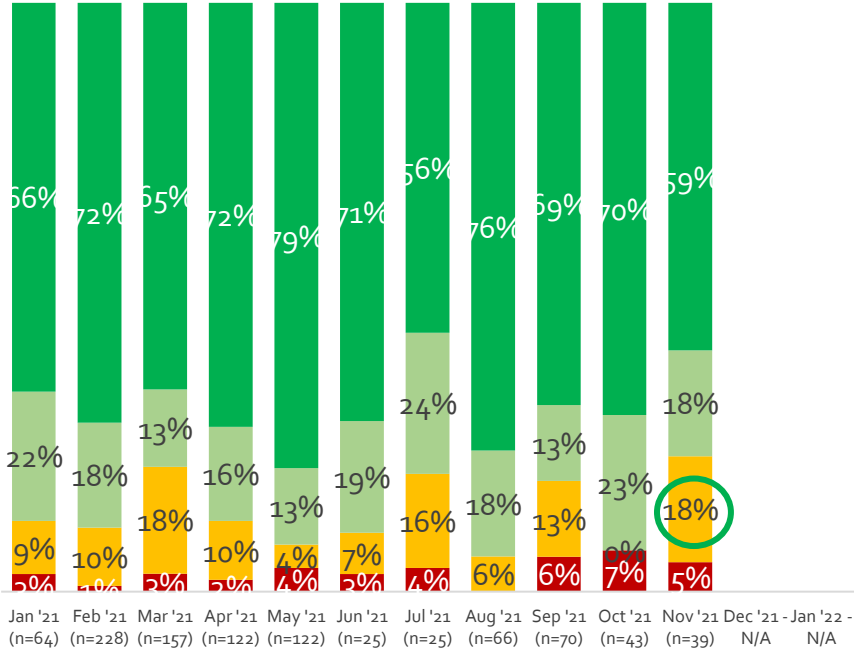
Having farm/estate branding on menu

Consumers

- I am aware and I am interested in this
- I am aware but I am not interested in this
- I am not aware of this but I am interested in this
- I am not aware of this and not interested either



Experts

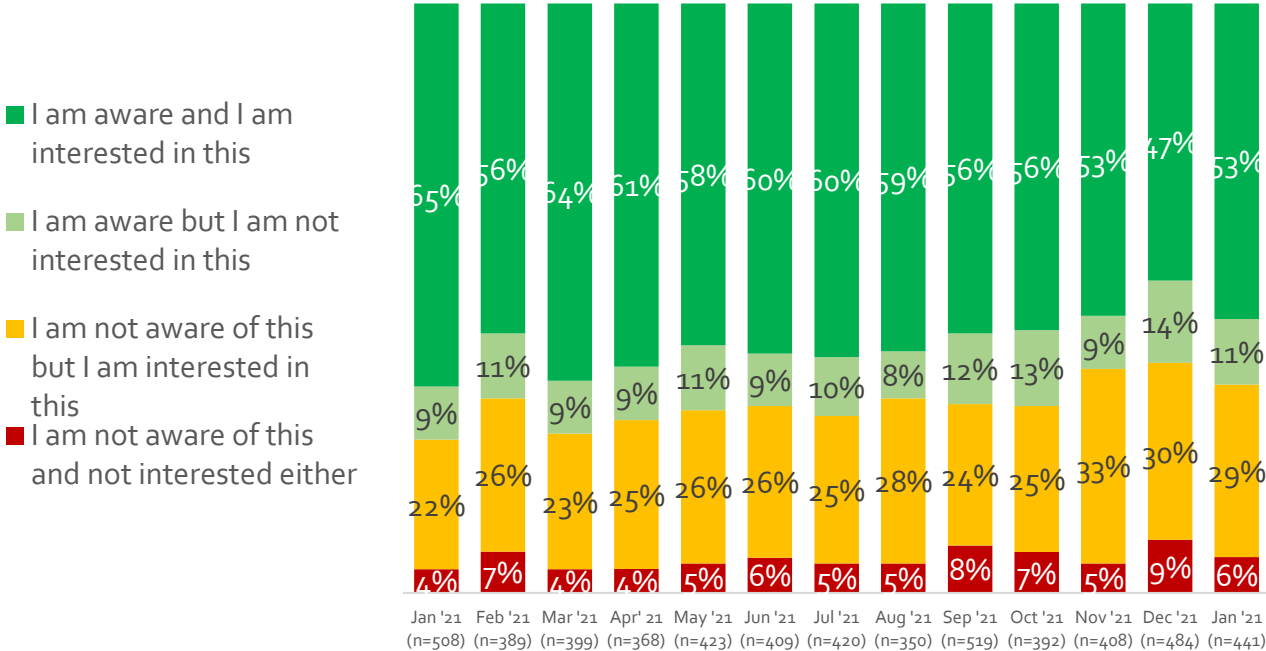


Month-on-Month significantly higher at 95% confidence

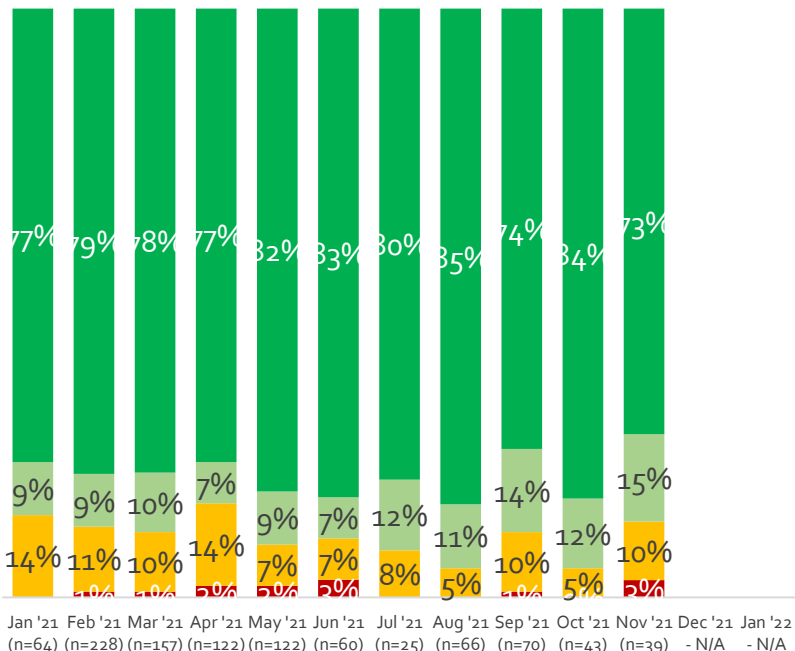
Although the proportion of those 'aware and interested' in venues using home grown ingredients has returned to levels previously seen before December, this is significantly lower year-on-year.

Going to venues that use home grown ingredients

Consumers



Experts

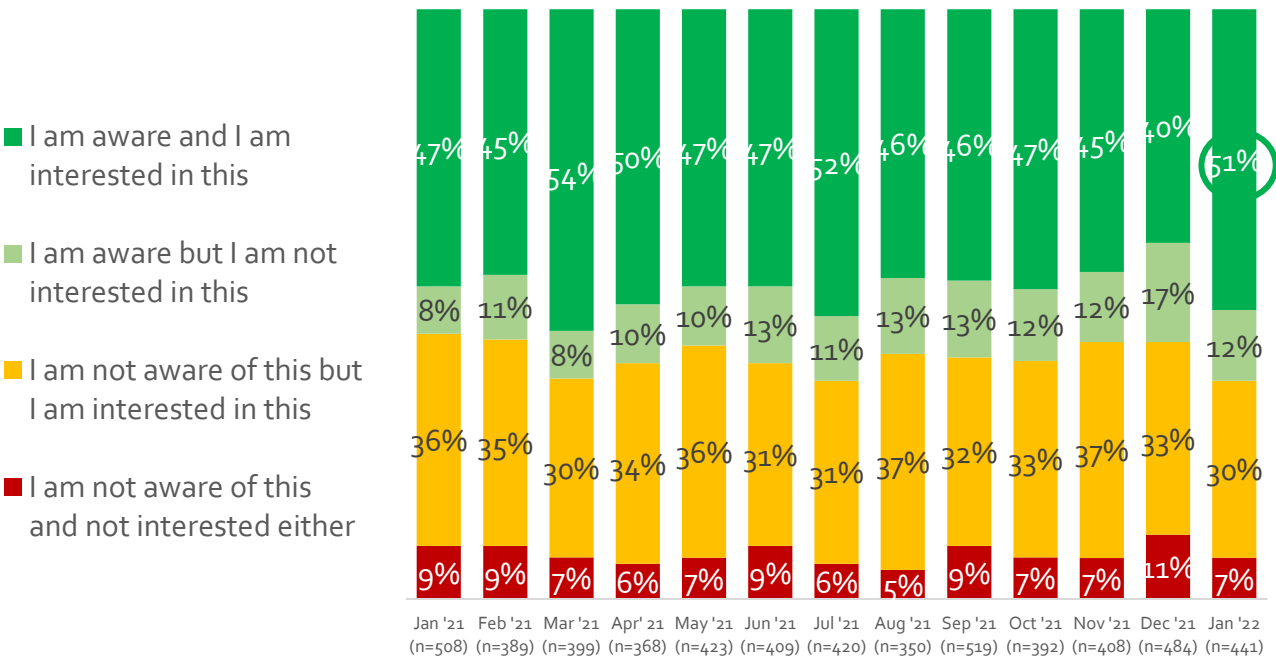


Q9. Now still thinking about eating out which statement best describes how you feel about each of these initiatives

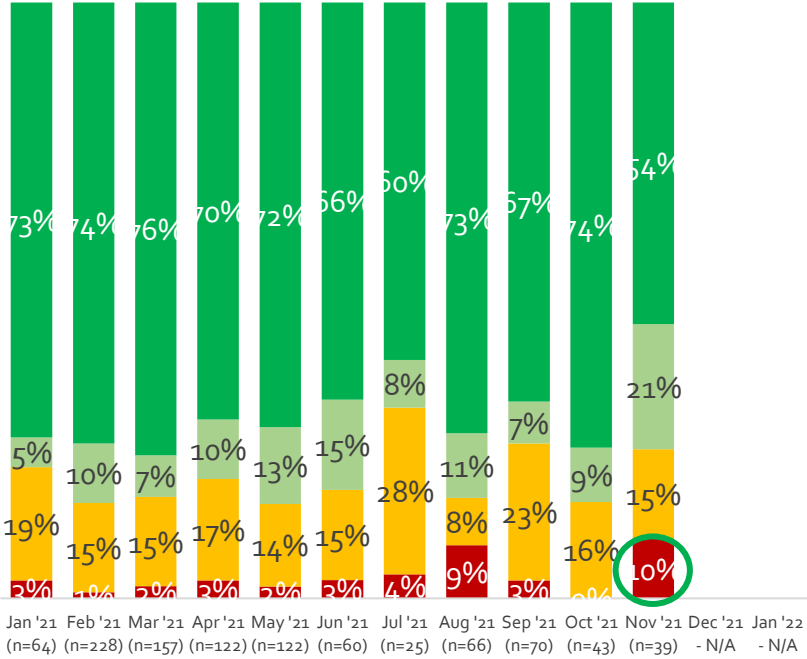
The proportion of those 'aware and interested' in sourcing from neighbourhood chefs has also significantly increased month-on-month, and also grown year-on-year.

Sourcing from Neighbourhood Chefs

Consumers



Experts



Month-on-Month significantly higher at 95% confidence

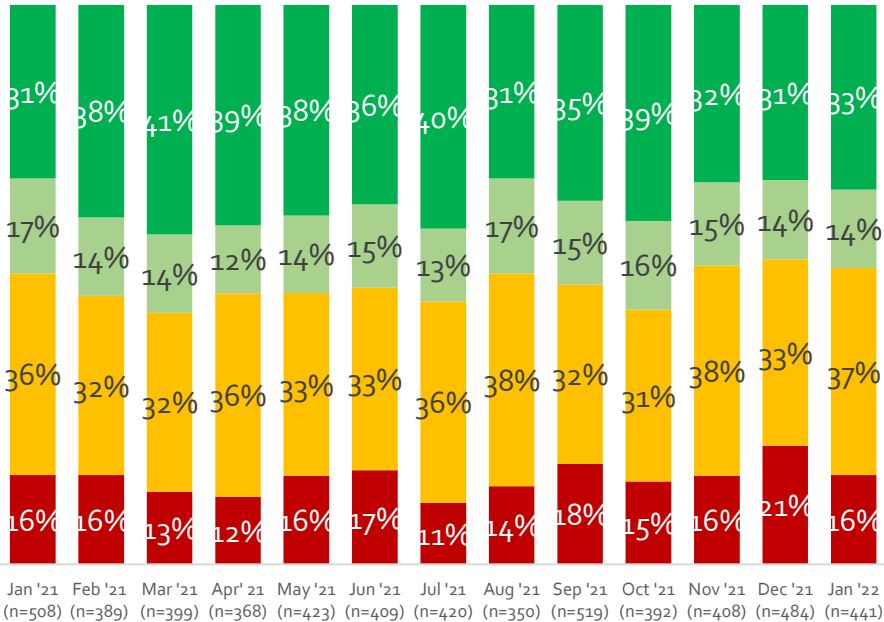
Q9. Now still thinking about eating out which statement best describes how you feel about each of these initiatives

The proportion of those 'aware and interested' in venues using heirloom/heritage seeds has remained stable, both month-on-month and year-on-year.

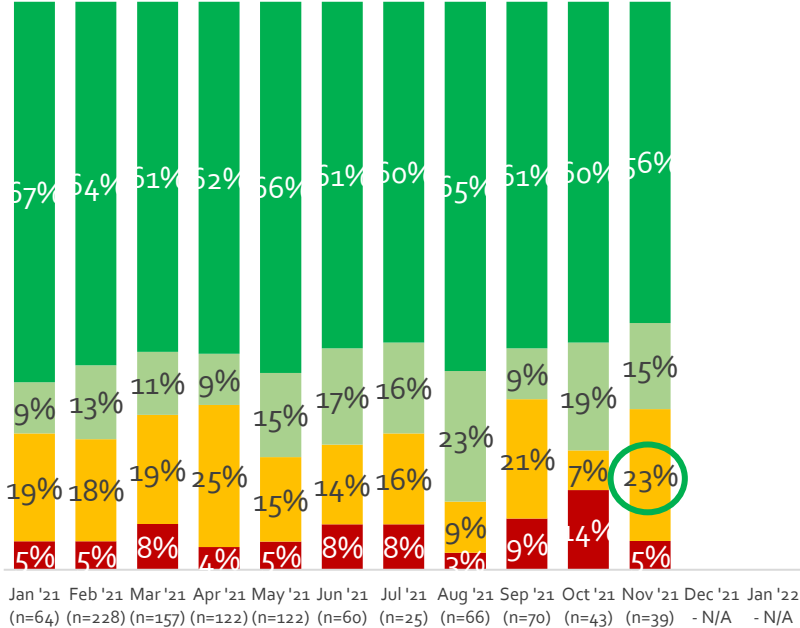
Using heirloom/ heritage seeds and breeds

Consumers

- I am aware and I am interested in this
- I am aware but I am not interested in this
- I am not aware of this but I am interested in this
- I am not aware of this and not interested either



Experts

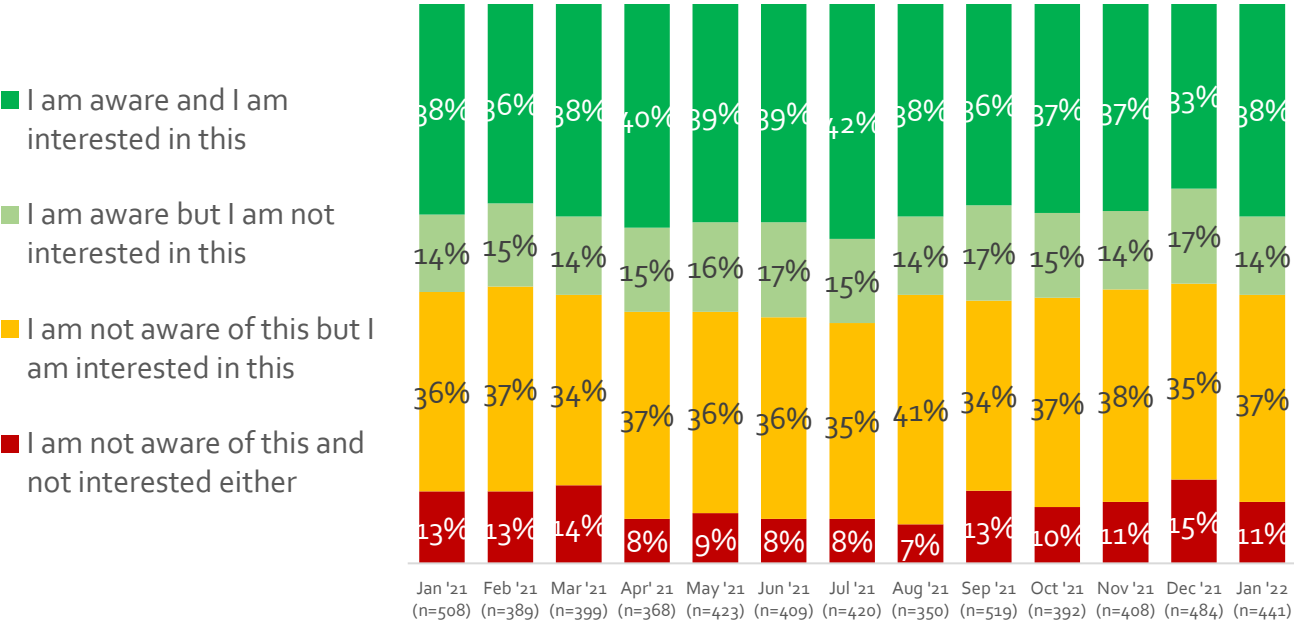


Month-on-Month significantly higher at 95% confidence

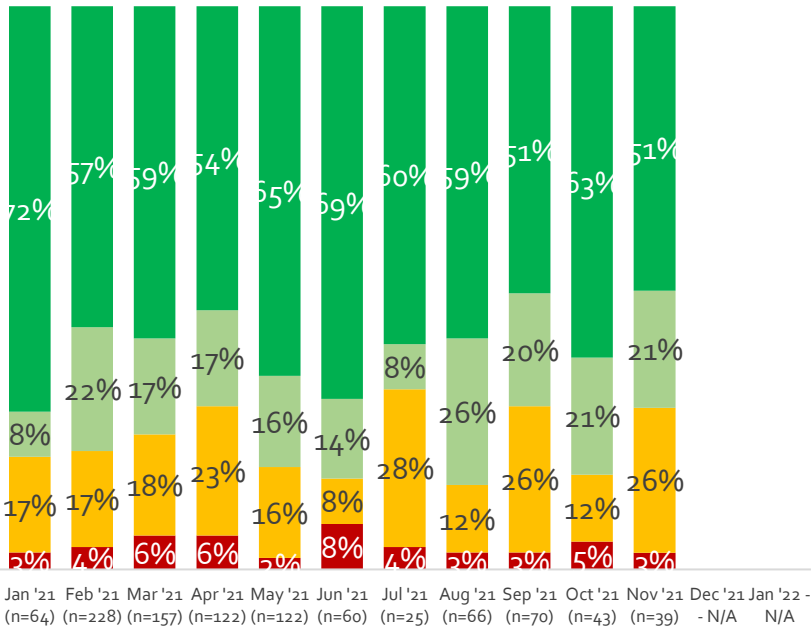
The proportion of those 'aware and interested' in the use of urban farms has remained stable year-on-year.

Using urban farms

Consumers

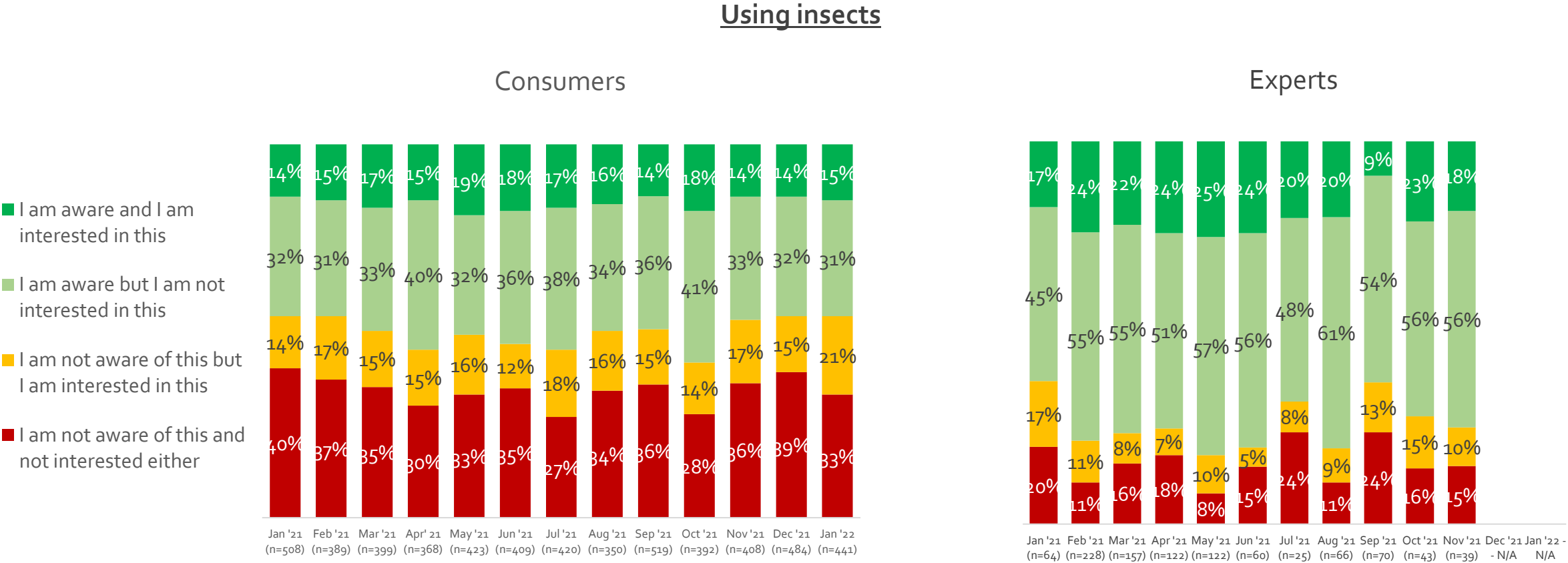


Experts



Q9. Now still thinking about eating out which statement best describes how you feel about each of these initiatives

The proportion of those 'aware and interested' in the use of insects remained consistent month-on-month and year-on-year.

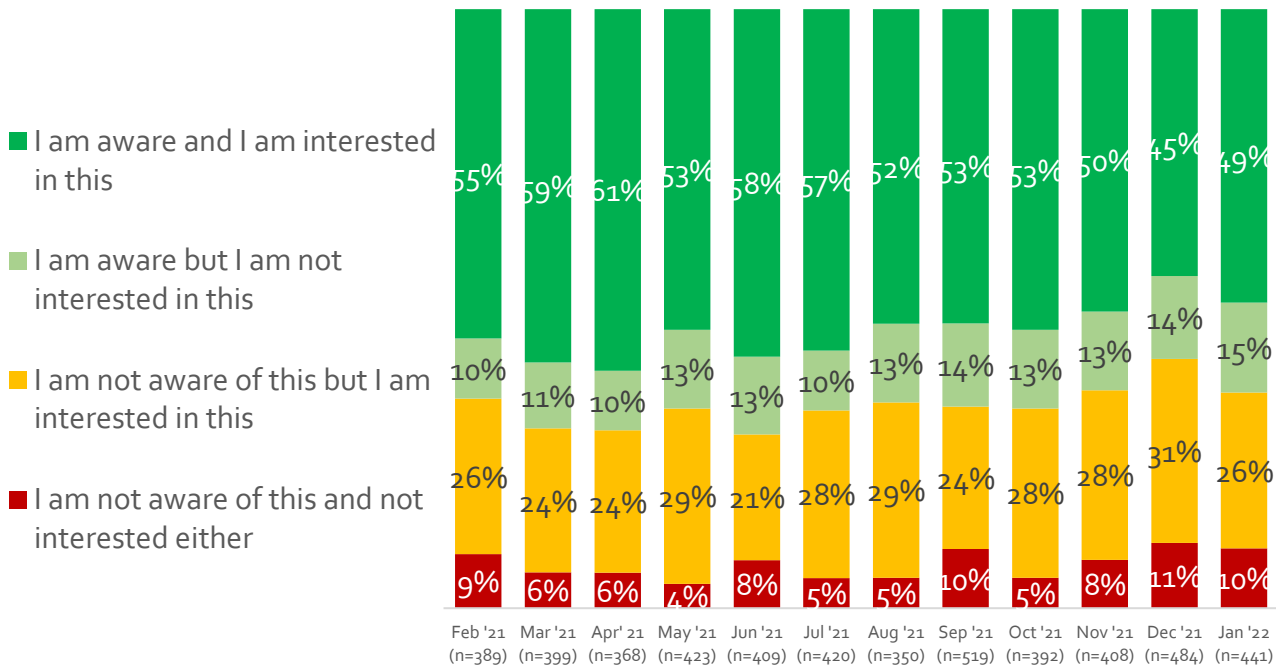


Q9. Now still thinking about eating out which statement best describes how you feel about each of these initiatives

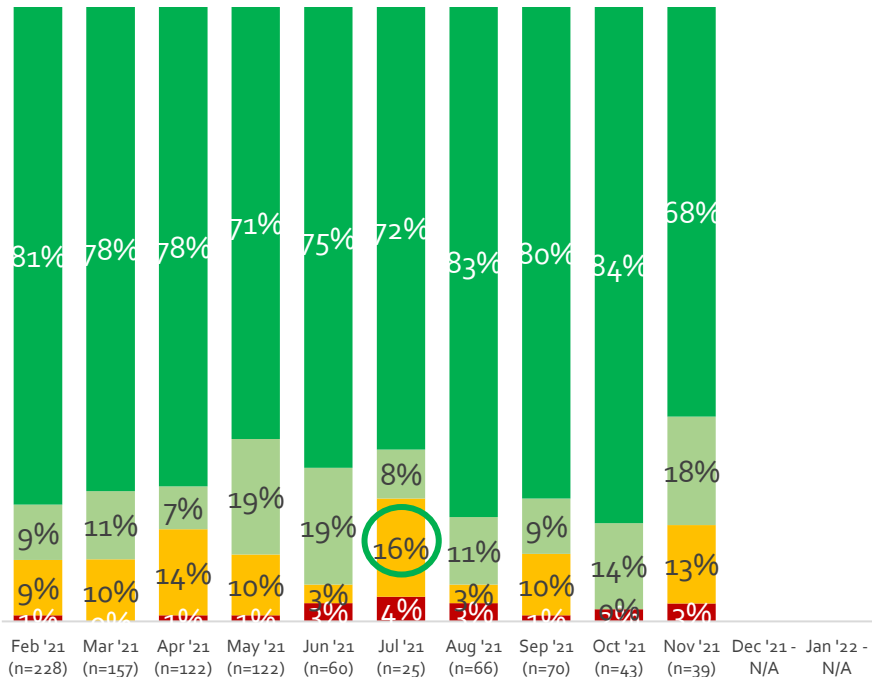
Month-on-month the proportion of those 'aware and interested' in shorter supply chains saw a slight increase.

Having short supply chains

Consumers



Experts



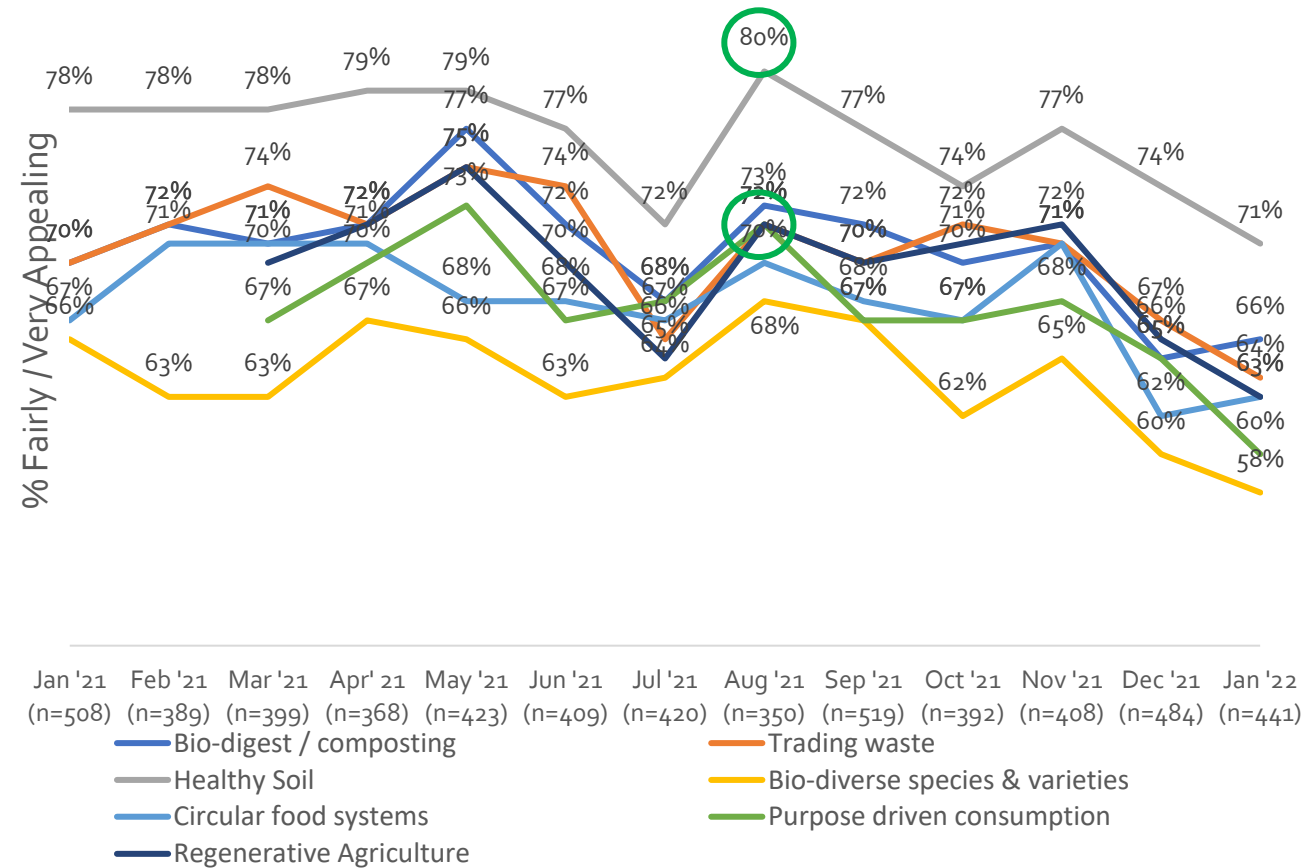
*New from February 2021

Month-on-Month significantly higher at 95% confidence

Q9. Now still thinking about eating out which statement best describes how you feel about each of these initiatives

Year-on-year the appeal of sustainability topics in the hospitality industry have continued to see a gradual decrease.

Consumers - Appeal of Sustainability in the Hospitality Industry

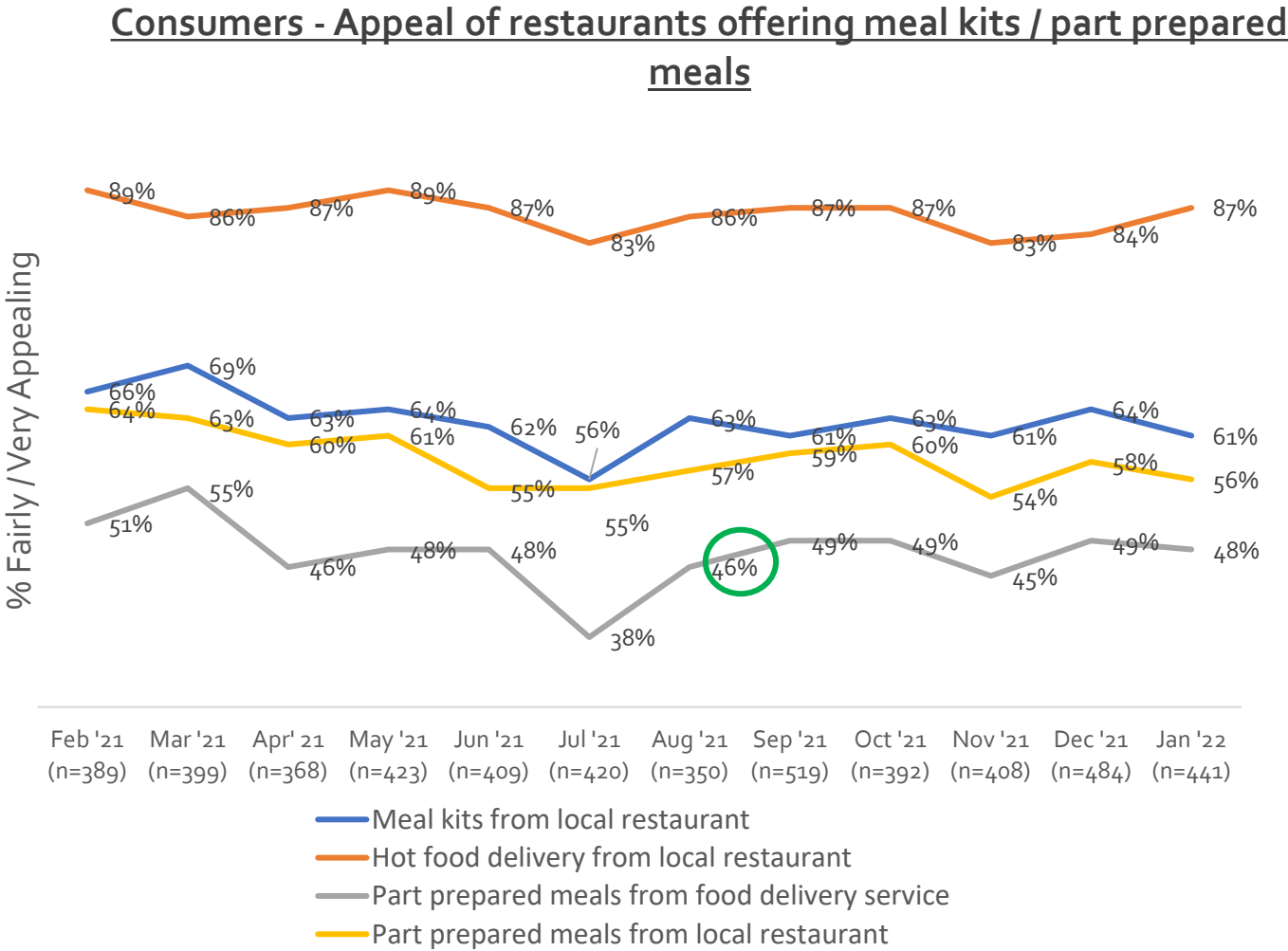


Experts (Fairly / Very Appealing)										
Jan '21 (n=64)	Feb '21 (n=228)	Mar '21 (n=157)	Apr '21 (n=122)	May '21 (n=122)	Jun '21 (n=60)	Jul '21 (n=25)	Aug '21 (n=66)	Sep '21 (n=70)	Oct '21 (n=43)	Nov '21 (n=39)
92%	85%	86%	88%	86%	85%	84%	83%	84%	75%	82%
88%	86%	83%	84%	85%	88%	90%	84%	85%	75%	82%
86%	84%	87%	86%	85%	80%	92%	88%	86%	82%	93%
	86%	84%	84%	87%	88%	84%	81%	88%	81%	87%
84%	81%	82%	80%	84%	83%	80%	86%	78%	79%	%
	83%	75%	82%	79%	79%	92%	75%	76%	80%	85%
81%	82%	82%	79%	80%	72%	84%	83%	80%	75%	79%

*New from February 2021

Month-on-Month significantly higher at 95% confidence

The appeal of meal kits and part prepared meals continue to remain popular choices among consumers.



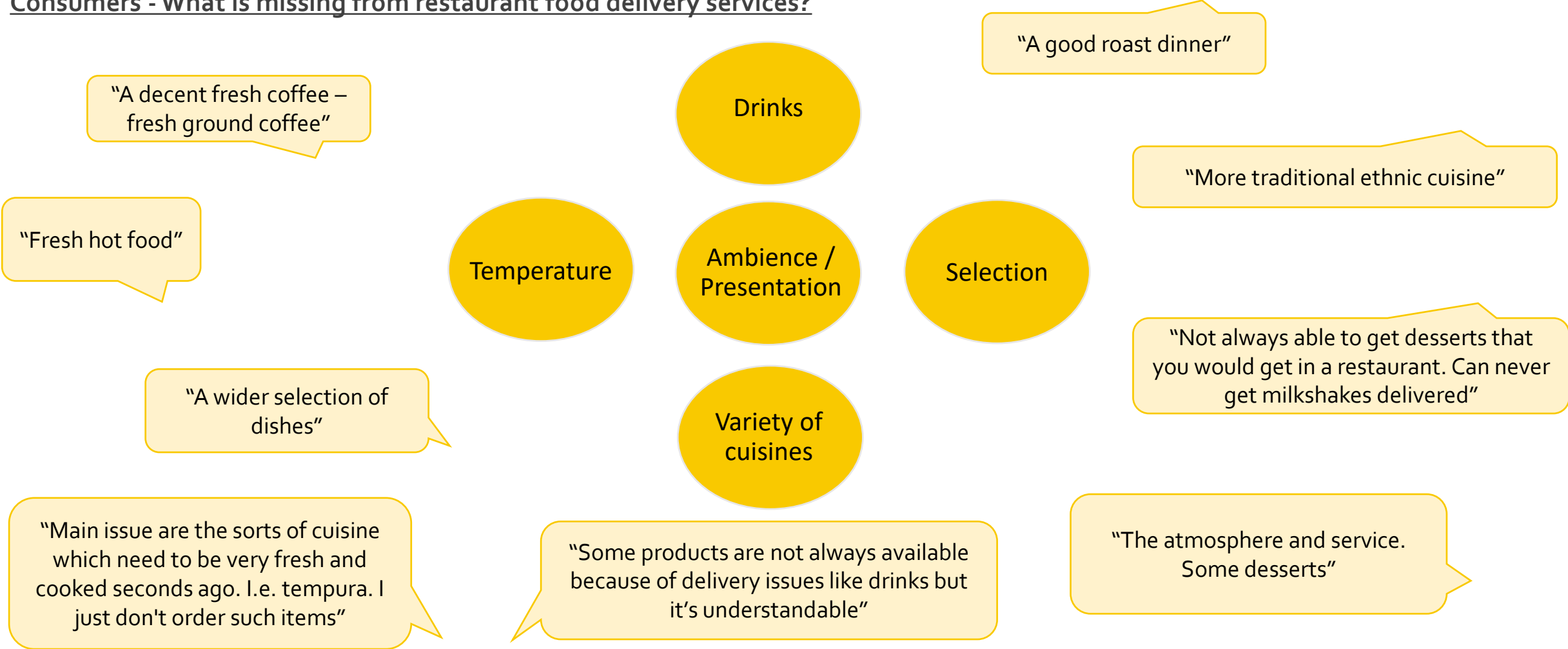
Experts (Fairly / Very Appealing)									
Feb '21 (n=228)	Mar '21 (n=157)	Apr '21 (n=122)	May '21 (n=122)	Jun '21 (n=60)	Jul '21 (n=25)	Aug '21 (n=66)	Sep '21 (n=70)	Oct '21 (n=43)	Nov '21 (n=39)
74%	76%	84%	68%	75%	76%	68%	80%	73%	75%
55%	59%	60%	48%	40%	48%	53%	50%	47%	62%
52%	59%	52%	44%	35%	60%	45%	55%	44%	51%
38%	40%	37%	32%	19%	44%	33%	39%	35%	43%

*New from February 2021

Month-on-Month significantly higher at 95% confidence

Consumers are looking for a wider range of drinks, hotter temperature of food and a wider ethnic range of cuisines.

Consumers - What is missing from restaurant food delivery services?





**FUTURE
FOOD**

BRINGING TRENDS TO THE TABLE

**Good
Sense
Research.**

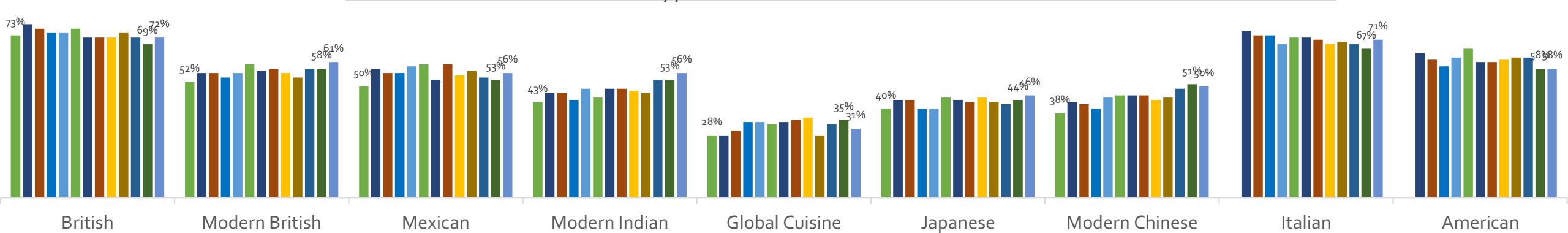
+

tfp

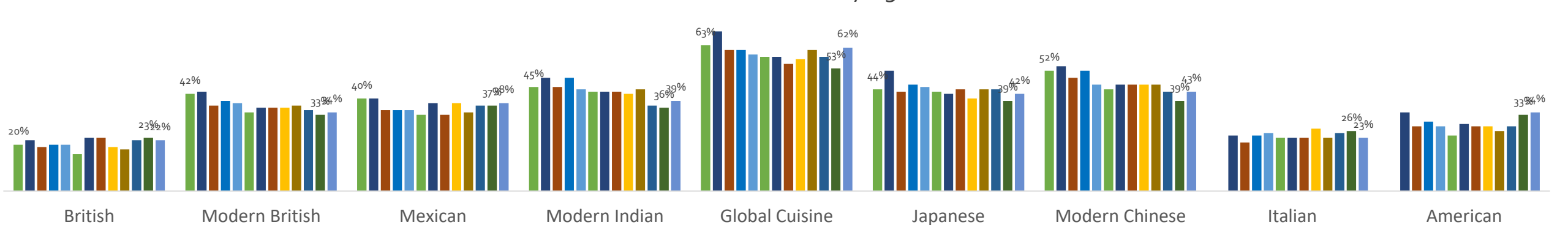
Cuisines

With January been a blue month consumers appeared to return to their comforts of British and Italian cuisines, but were still open to try different tastes as well.

Consumers - % I know what types of food are included in this cuisine and have tried it before



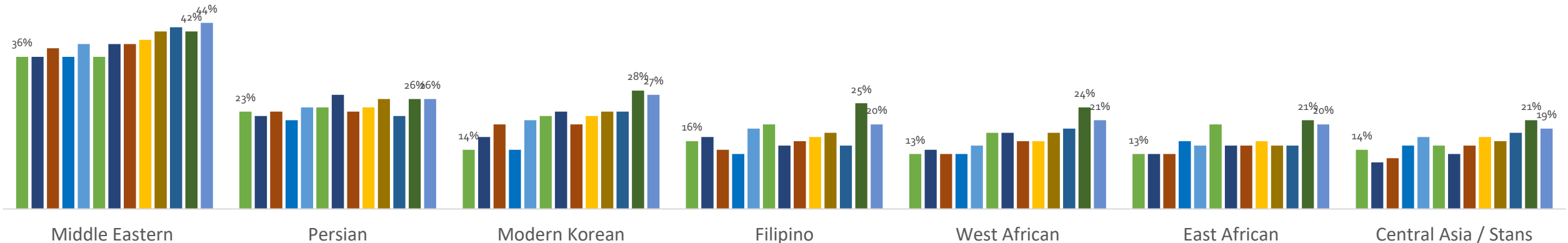
Consumers - % Interested in trying these cuisines



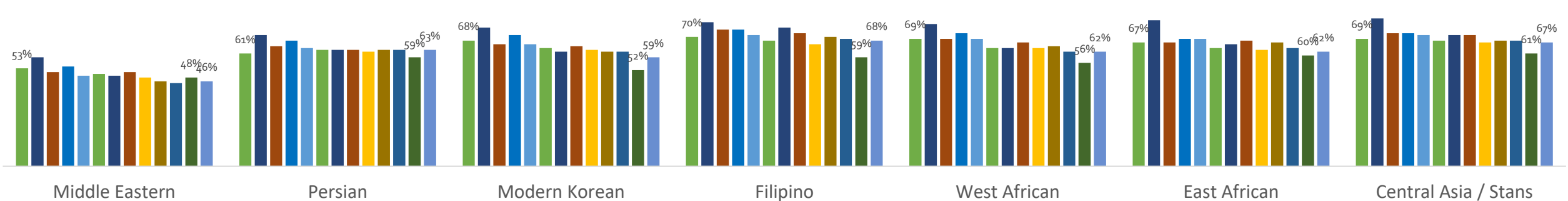
Jan '21 (n=508) Feb '21 (n=389) Mar '21 (n=399) Apr '21 (n=368) May '21 (n=423) Jun '21 (n=409) Jul '21 (n=420) Aug '21 (n=350) Sep '21 (n=519) Oct '21 (n=392) Nov '21 (n=408) Dec '21 (n=484) Jan '22 (n=441)

Although consumers appeared to be less adventurous in their participation in January there was still eagerness to try the lesser well-known cuisines.

Consumers - % I know what types of food are included in this cuisine and I have tried it before



Consumers - % Interested in trying these cuisines



Jan '21 (n=508) Feb '21 (n=389) Mar '21 (n=399) Apr '21 (n=368) May '21 (n=423) Jun '21 (n=409) Jul '21 (n=420) Aug '21 (n=350) Sep '21 (n=519) Oct '21 (n=392) Nov '21 (n=408) Dec '21 (n=484) Jan '22 (n=441)

Consumers believe the up-and-coming food trends are Plant-based, Vegan, Street-food, Sustainable and Korean.

Consumers – Up and coming food trends

“Local and seasonal ingredients used”

“Plant-based food,
sustainable fish and
meat based food, eating
at home with a group of
friends”

“Healthy eating/ flexible
plant-based diets”



“Street-food and pop-up restaurants seem to be becoming popular with plenty of choice”

“Sustainable, plant-based and other ethical practices. Including more sustainable meats such as venison”

"Korean - fried chicken, rice dishes, kimchi etc"

“Meat substitutes. Beyond meat for example. All fast food chains are now offering vegan / environmental options to customers. It can be used across all cuisines / countries”



FUTURE FOOD

BRINGING TRENDS TO THE TABLE

If you want to hear more about Future Foods and receive the trends report going forward please sign up on the link below or contact Helen or Charles.

<https://mailchi.mp/thefoodpeople/futurefood>

**Good
Sense
Research.**

+ tfp

@goodsensersearch
goodsense-research.com

helen.blair@goodsense-research.com

@foodwatching

@thefoodpeople

thefoodpeople.co.uk

charles@thefoodpeople.co.uk