

The Real Food Trend

How and what we eat takes centre stage for Australians



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A typical meal is now freshly prepared and shared with the whole family; dinner is now a time to catch up and connect.

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Introduction



The way that Australians shop, cook, eat and think about food has been changing over the past five years. This has been driven by a desire to reclaim personal responsibility for health.

This significant shift in attitudes has been identified in both qualitative and quantitative research commissioned by Meat & Livestock Australia (MLA), and involving interviews with over 100,000 consumers in total. Interestingly, the findings broadly match those observed in similar research conducted in the United Kingdom.

In this special report the research findings are presented and the shift in behaviors and attitudes is explored. The changes have important implications for the food industry.

As the trends solidify across the society, successful brands will be those that can prove their credentials against a growing checklist of attributes, including authenticity, genuine freshness, provenance and health perceptions.

The real home-cooked meal

Australian mums are now making sure that the family sits down together to share a main meal. The meal itself is changing too, with more meal preparers making dinner from scratch.

Close to nine out of every ten Australian mums make sure the family sits down together for the evening meal. This is part of an increasing trend to see family meal time as a crucial time for family connection and communication.

Families are increasingly turning off the television, making the family meal an important time for connection and communication. More than half say that they don't watch television during dinner.

Dinner is typically freshly prepared, and increasingly made completely from scratch. Meal preparers think of this kind of meal as traditional and associate it with meat and vegetables. Red meat is the most common protein base, typically served with an average of four different vegetables, not including potatoes.

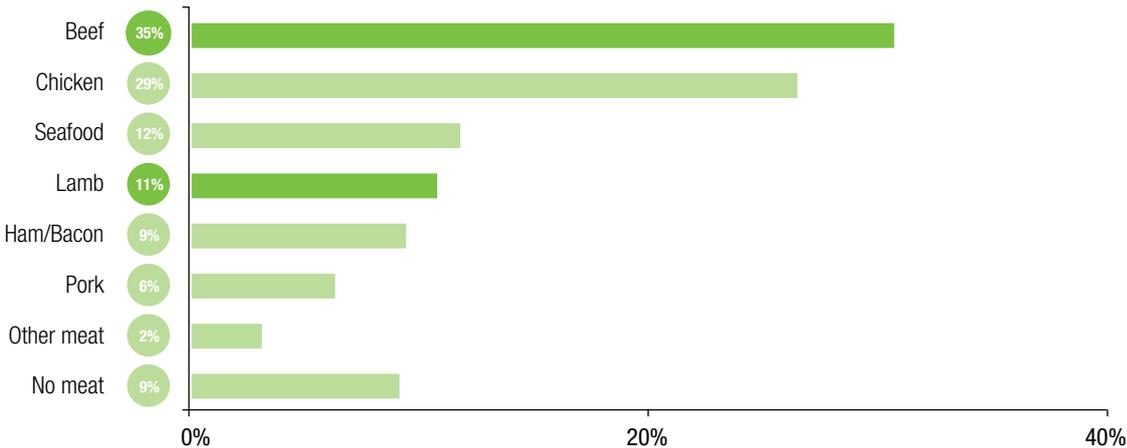


Family meals are an important source of family connection, based around a traditional meal of meat and several different vegetables, prepared from fresh ingredients, often completely from scratch.

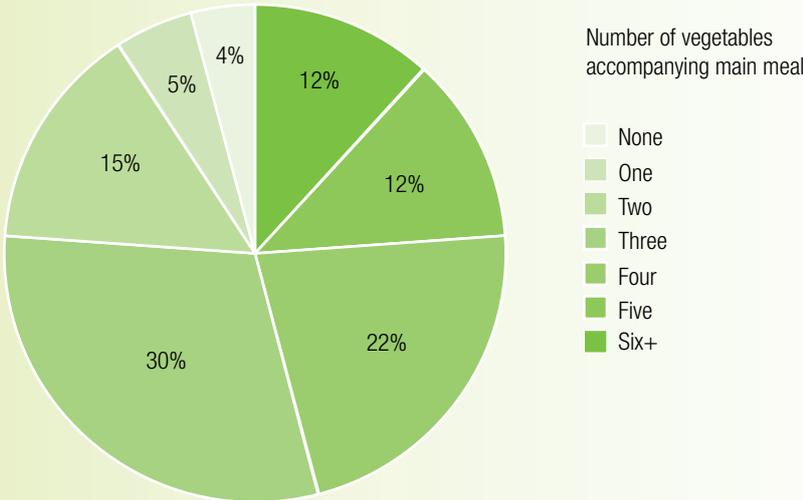
The real meal is freshly prepared, often completely made from scratch



In the typical meal, red meat is the most common protein source, followed by chicken and fish



Most serve the protein base with 3+ different vegetables



We are cooking more and enjoying it

Finding time to cook, despite crowded daily schedules, is a new priority. We now believe that finding the time and energy to cook is worth the effort.

The proportion of Australian meal preparers who say they 'love to cook' has steadily increased so that now two out of every three of us is an avowed lover of cooking. What was once seen as drudgery from which mothers hoped to escape via quick and easy convenience foods, has been rediscovered as a source of pleasure, and an agent of personal control.

Increasingly we enjoy cooking, and seek to cook healthy meals which the family enjoys and which nourish us, physically and emotionally.

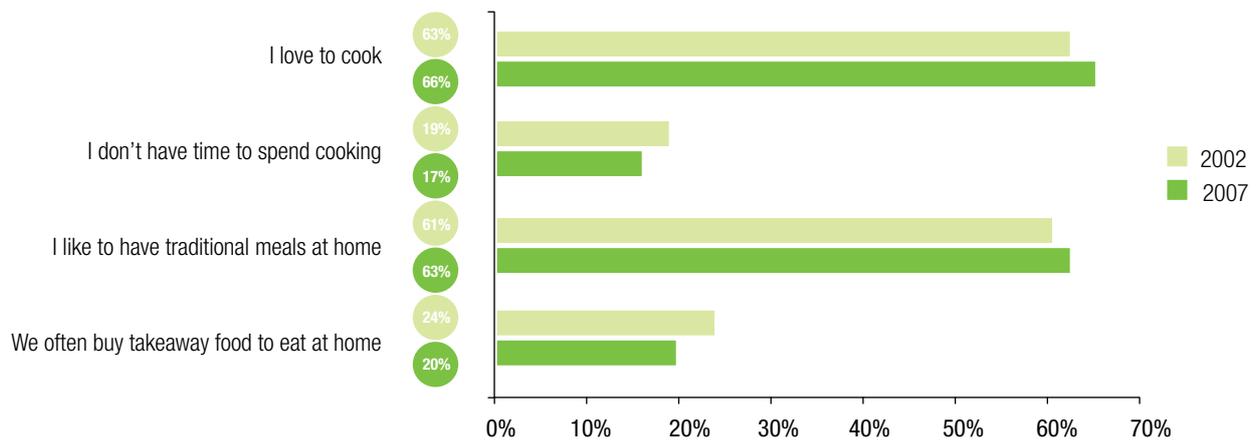
Our busy lifestyles haven't changed but our priorities about food have, so that we are now happy to make an effort to cook, a trend that ranges across different age brackets and demographic groups throughout the society.

Our rediscovered love of cooking is connected to our desire for both improved physical health, and strong family connections. We cook meals that are low in fat, are nutritionally balanced, and which the whole family enjoys. Meal time, we believe, nurtures and nourishes the family bond.

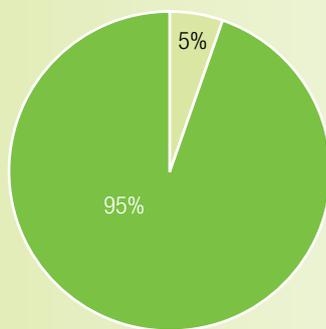
Cooking a healthy, enjoyable evening meal is perceived as an activity worth the time and effort it takes. Enjoyment is important for its own sake. We also believe that enjoyment has an extra health benefit; by providing satisfaction it decreases late-night snacking.



The trends show increasing enjoyment of cooking and a decrease in takeaways

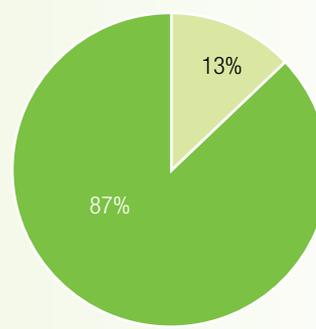


We cook to keep the family healthy and to nurture family bonds



It is important to me to cook the main meal for the family so that I know they are getting at least one balanced meal a day

Agree Disagree

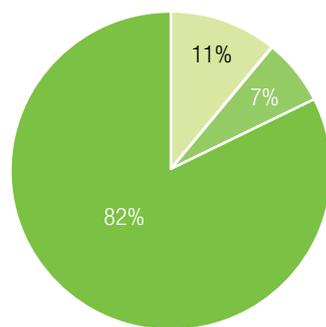


I make sure the family sits down together for the main meal because it's important to know what's going on in the lives of their family

Agree Disagree

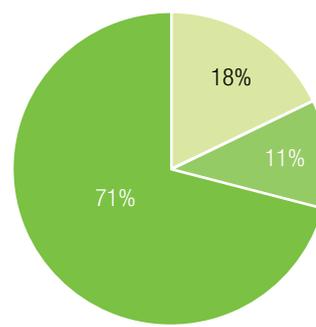
Cooking is a health priority

Thinking about NOW compared to 5 years ago, tell me whether you agree or disagree with the following statements:



I make more of an effort to prepare healthy meals to reduce the risk of illness in the household

Agree
Neither Agree or Disagree
Totally Disagree

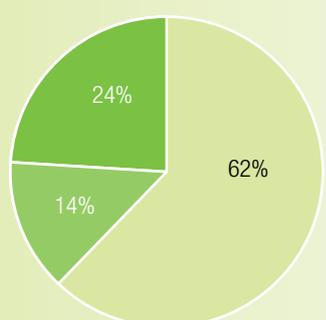


I make much more of an effort now to prepare meals that help manage my own weight or someone else's weight in the household

Agree
Neither Agree or Disagree
Totally Disagree

Enjoyment is important for its own sake

Compared to 5 years ago, do you tend to prepare more, less or about the same number of...



Meals that all the household enjoys

More
Less
Same

Fresh food is best

Our new attitudes put the priority on core foods, purchased at their freshest. These foods are trusted more than processed and fortified foods.

The new home-cooked meal often uses nothing but fresh foods, so it's not surprising that our consumption of fresh fruits and vegetables has increased, along with the money that we spend on fresh foods.

We are making a concerted effort to avoid foods that contain preservatives, artificial colours and flavours. Mothers are concerned about the impact of chemicals on the health of their children.

Increasingly we are cooking with fresh ingredients, and are keen to avoid preservatives and other additives. We are concerned about chemicals in foods and turning to foods that are reliable and authentic.

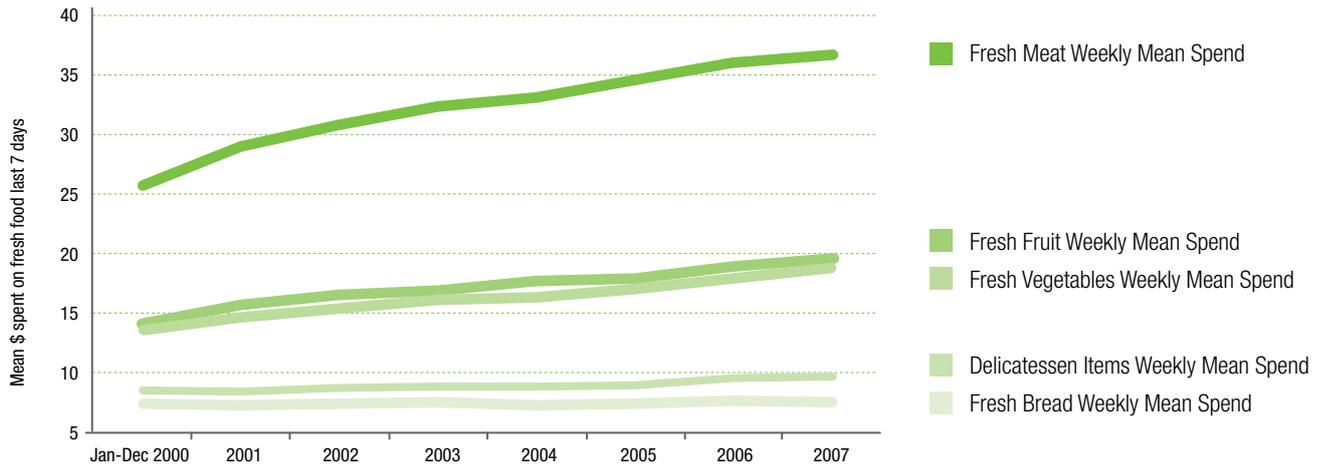
At the same time, we have become wary of the ability of supplements and fortified foods to deliver good health. We no longer trust the health claims made by manufacturers, and have concerns that food authorities aren't doing enough to regulate those claims.

The distrust in manufactured foods has sent us back to the fresh product, and increasingly when we say fresh we don't mean pre-packaged, waxed, gassed or cold-stored.

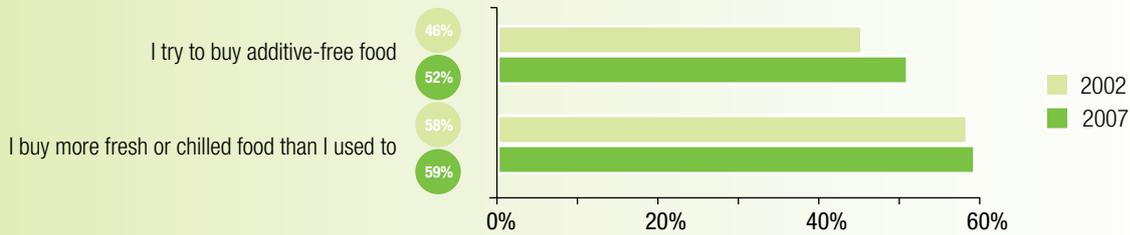
With the increasing concerns about freshness and the authenticity of food, consumers are seeking out independent retailers perceived to have a closer connection to producers. This is spurred by both a desire for the freshest food, and a commitment to the community and the social good of local production.



We are spending more on fresh food

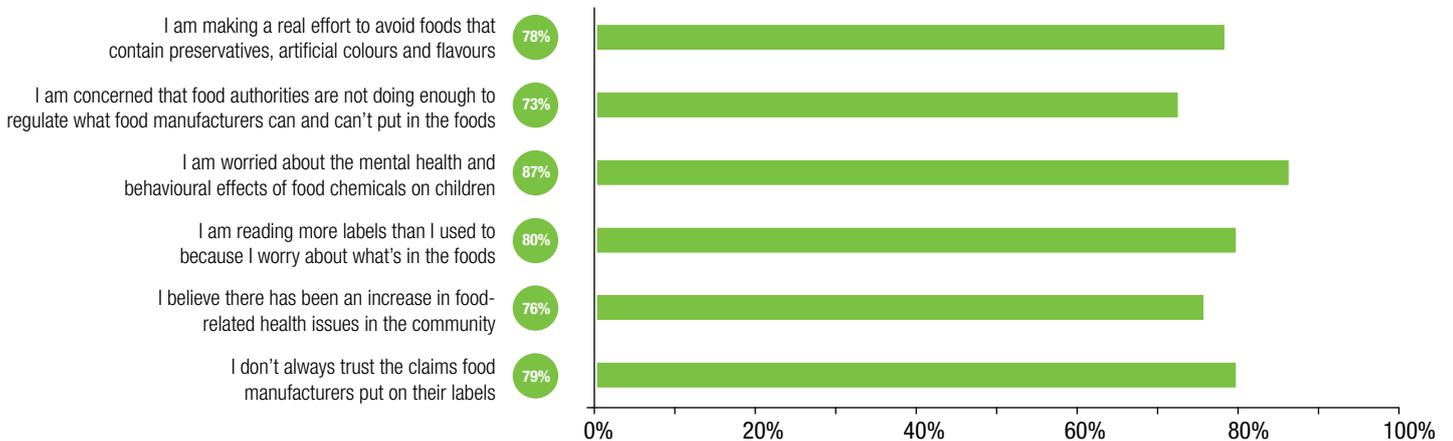


We are choosing additive-free foods



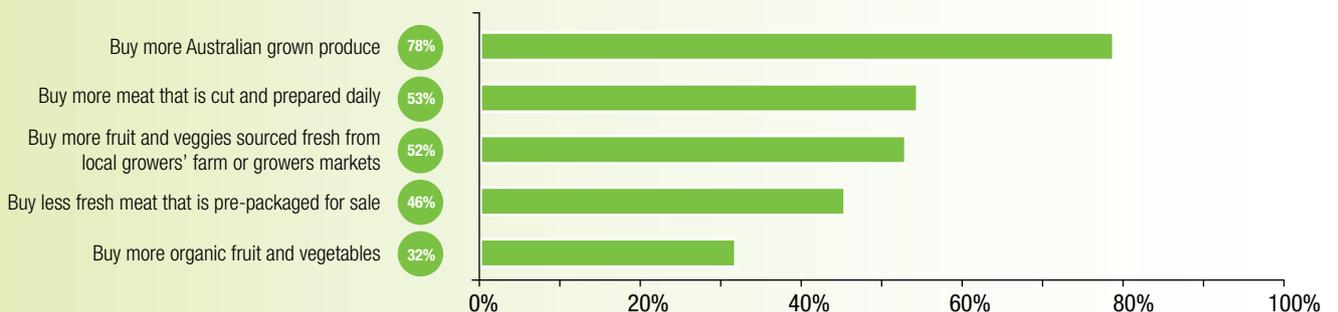
We are apprehensive about food additives

How much do you agree with the following statements:



We are changing our 'fresh' purchasing practices

Thinking about NOW compared to 5 years ago, tell me whether you agree with the following statements:



Health is our motivator

At least seven out of every ten Australian households include someone dealing with a health issue. So when we think about dinner, we are increasingly thinking not just about personal tastes and family budgets, but also about the health impacts of our choices.

The vast majority of Australian households include someone dealing with a health issue impacted by diet. The incidence of health problems is even higher in households where weight and obesity are also an issue.

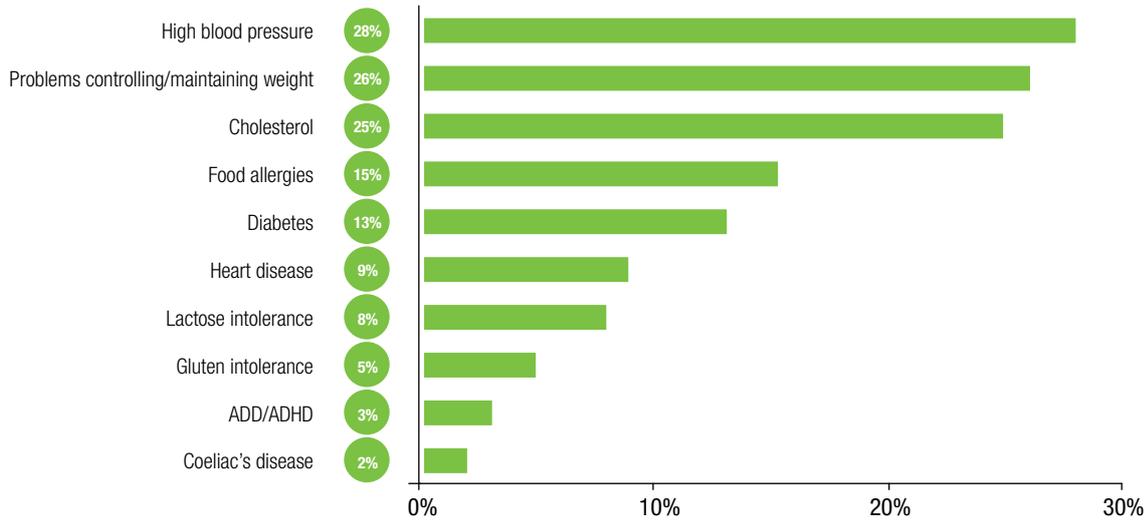
Given the burden of that ill-health, food preparers are making efforts to eat more healthily. Most of us are preparing foods with as little fat as possible, and one in four of us does not add any fat to the food they cook.

Most Australian households are dealing with health issues and are making efforts to create a healthier lifestyle, in large part by taking more control over the foods they eat and how they are prepared.

Media coverage of the issue of child obesity is also effecting our behavior, even if we aren't personally affected. About half of all meal preparers with school age children have made changes to their children's diet as a result of the publicity given to childhood obesity.

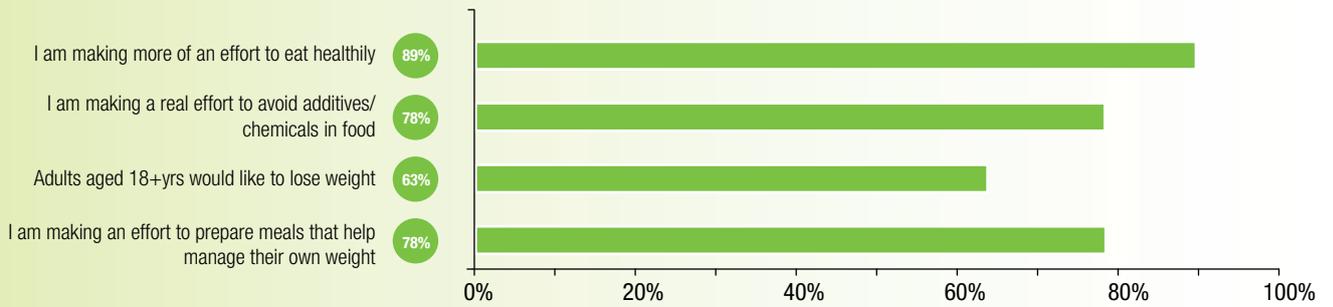
Health Issues in the Household

804 respondents

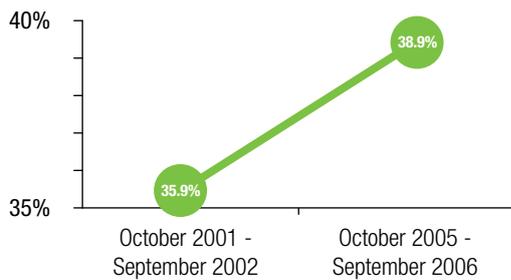


We are making an effort to live a healthier lifestyle

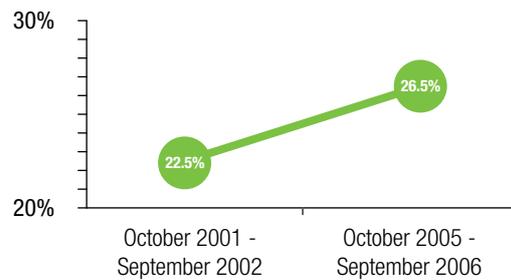
How much do you agree with the following statements:



A low fat diet is a way of life for me



I always think of the number of calories in the food I'm eating



Concerns about obesity are changing behaviors

Media - a catalyst for change

40% agree that 'stories in the media about overweight Australians have made me take steps to change my daily diet'

51% of meal preparers with school age children have made changes to their children's diet as a result of the publicity given to childhood obesity

Universal childhood obesity concerns

94% believe that the number of overweight children in Australia is increasing

95% are concerned that kids are eating too much junk these days

Leads to more emphasis on healthy eating

81% now claim to be making a real effort to ensure the meals they prepare are as low in fat as possible

Healthy food is a healthy investment

Media attention on Australia's over-burdened health budget, strained by new costs related to increasing obesity, has fostered a more acute awareness of the cost of health today. At the same time private health insurance costs are increasing, fuelling a growing belief that we can't afford to be sick.

We are concerned about our health and wellbeing for its own sake, and we are increasingly concerned about the financial impact of illness. We believe that the financial squeeze on domestic finances is too much to take the added cost of illness, and that we simply can't afford to take time off work being sick.

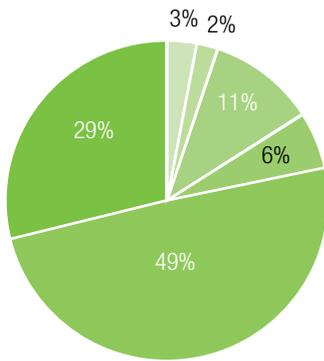
With a growing awareness of the individual and societal costs of ill health, particularly obesity, we are starting to act on prevention. By taking responsibility for our diet, we believe we can influence our health in the future, and that this investment is well worth the effort and financial cost involved.

There is a strong belief in the link between nutrition and health outcomes, and this belief dictates food choices. We are increasingly willing to pay a premium for better food, partly because we believe we can't afford not to.

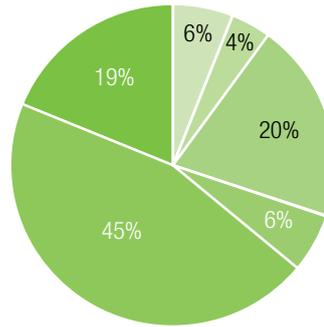
This underlines a new approach to our health – prevention. Where once motivation for lifestyle change was a response to an actual health problem, we are now willing to put money

and effort into avoiding health problems, by making lifestyle changes now, particularly by choosing to eat more healthily.

Ill-health costs time and money we can't spare



The financial pressures on Australian households mean that we cannot afford to get sick

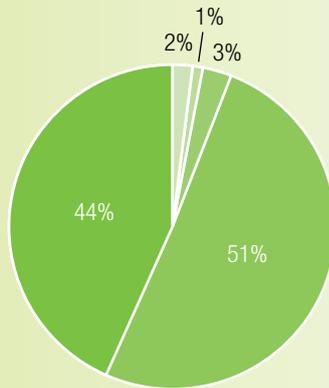


Australian households are so busy we cannot afford to take time off when we are sick

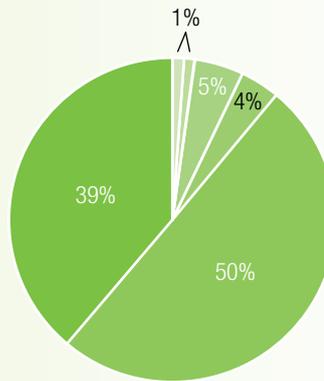
Strongly Agree Agree Neither Agree Nor Disagree Strongly Disagree Disagree Can't Say

Taking responsibility

I would like to know whether you agree or disagree with the following health and dietary statements:



I believe the foods I eat now will determine how healthy I am in years to come



I have to take responsibility for ensuring my own good health; and so I make more effort these days to eat healthily

Strongly Agree Agree Neither Agree Nor Disagree Strongly Disagree Disagree Can't Say

Healthy food is an investment



Where are we heading?

The research points to the beginnings of a paradigm shift in our social values. Despite a decade of unprecedented wealth, almost endless choice and instant gratification, we are not as 'well' as we feel we should be, and so are beginning to re-evaluate what is required to deliver genuine physical and emotional wellbeing.

The insatiable appetite for consumption which has fuelled the past decade can't be divorced from our health. Obesity is seen as the manifestation of the 'illness' of our affluent society. This realisation leads to a desire to connect with core values to achieve better health and real fulfillment.

The new importance of authenticity has led to a decline in the value of 'convenience', which is now seen to come at a price. Instead we prioritise 'real' food and 'real' values. We are stripping away the junk in our lifestyle and in our diets, reinstating 'real' food as the centrepiece of family connections.

Recognising the real sees us move from the continual snacking of 'recreational eating' to the three square meals approach of 'hunger eating'. It sees us choosing the freshest foods possible, searching for a closer connection to producers, and rejecting fortification and supplementation in favour of whole foods in a balanced diet.

We are also seeing a developing sense of personal responsibility for health. We are seeking to "eat the way we were meant to eat" so as to better control our health. Where previously we were content to rely on retailers, marketers and manufacturers to make healthy food easier for us via fortification and health claims, we now feel our trust may have been misplaced, and that seeking authenticity may be safer.



I am taking responsibility for ensuring my own good health. I believe the foods I eat now will determine my future health.



We love to cook meals that everyone enjoys eating around the dinner table.



I read food labels to avoid chemicals in food. I don't trust the claims on food. I'm worried about the behavioural effects of food chemicals on children.



We are buying more fresh meat, fruit and vegetables. Superior quality and local production is important to us.

The number of overweight children is increasing. Kids are eating too much junk these days.



I'm making more of an effort to eat healthily to help manage weight.



I usually make dinner from scratch, using fresh red meat and vegetables.



About the research

The research summarised in this paper was collected from three different studies conducted over a number of years.

Roy Morgan Single Source Longitudinal Data

A door-to-door survey conducted around Australia, with a nationally representative sample. The sample size is approximately 2,000 respondents per month.

Initial Qualitative Research

To further explore the trends, six focus groups were conducted by Julie Dang in April 2007:

- The sample consisted of mothers in Sydney and Brisbane, with a split between those with younger and those with older children, and between working/ non-working mums.
- All groups consisted of eight participants and ran for two hours.
- All participants were main grocery buyers responsible for cooking the evening meal.
- All participants passed a screen to ensure they were reflective of the behavioural trends established in single source.

Follow-on Quantitative Research

On the basis of the trends identified in the qualitative study, a questionnaire was developed by Roy Morgan research:

- The survey was conducted in June 2007 using Computer Assisted Telephone Interviewing (CATI)
- Sample of 804 Australian meal preparers, randomly selected from the White Pages.
- Data was weighted by location and household size to the Australian population.

The research was commissioned by Meat & Livestock Australia (MLA). MLA is a producer-owned company and represents the beef, sheep meat and goat meat producers of Australia and manages research and development, marketing and communications on behalf of the red meat industry.

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Published by Meat & Livestock Australia Limited
ABN 39 081 678 364
October 2008

© Meat & Livestock Australia Limited (2008)

ISBN 9781741912869

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