



THE Waitrose FOOD AND DRINK REPORT

2016

*As a nation, we're
expressing ourselves
through food as never
before. Food is today's
hottest social currency*



2016: food as self-expression

Food is no longer solely about sustenance or satisfying our taste buds. The latest research from Waitrose has identified four key trends highlighting that we're increasingly expressing who we are through what and how we eat



Self-expression comes in many forms. The clothes people wear, the cars they drive and the music they listen to all tell us a little about who they are. The Waitrose Food and Drink Report 2016 has uncovered a new addition to this list: we're now expressing ourselves through food, too. From healthy eating and the explosion of food photography on social media, to our desire to entertain others through cooking, food is today's hottest social currency: through it, we tell others about ourselves.

At Waitrose, our mission is to help customers enjoy great food every day and it's essential to keep a watchful eye on shifting trends to achieve this. Our report always provides an intriguing insight and, right now, it's clear things are changing, and fast. One example of this is the impact that Instagram culture has had on how we view food. Literally. Our research found that a fifth of all Britons have posted a picture of their food on social media – or sent a picture to a friend – in the past month. This increases to a third of people

aged 18-34. Today, people design and take pride in dishes and then they share them with the world.

Expressing yourself through food is not just about how your plate looks. It goes far deeper. What and how we choose to eat is also an expression of our attitude towards health and wellbeing. Healthy eating is no longer a bolt-on to how we live – it's an integral part of who we are. And, with more than 70% of us regarding healthy eating as part of our identity, it's no longer something to be coy about, as the rocketing popularity of seeds and grains, seaweed and smoothie-makers demonstrates. Living well is something to celebrate, as is an increased awareness of the environment and waste – we are all conscious consumers now.

But perhaps the greatest forum in 'self-expression Britain' remains our own kitchens. Our urge to entertain others with food – to indulge them and, just occasionally, show off to them – grows unabated. We love to delight people through food. Informal feasting, involving sharing plates and a relaxed attitude, is on the rise. Over the past year, almost four in 10 of us have either hosted or been to an 'everyone bring a dish' party, a revolving *Come Dine with Me*-style event or a themed dinner party.

Above all, our research suggests that people are enjoying their food more than ever before. Food is fun and it says so much about us. And, at Waitrose, we'll continue to help people enjoy it in every way that we can.

Rob Collins

'Living well is something to celebrate, as is an increased awareness of the environment and waste – we are all conscious consumers now'

ROB COLLINS, MANAGING DIRECTOR

The facts & figures

Waitrose carried out extensive research into the year's top food and drink trends in 2016.

We conducted widespread OnePoll consumer research with 2,000 people of all ages – not exclusively Waitrose customers – on an extensive range of topics. This was supported with focus groups in which people were asked in-depth questions about their shopping, cooking and eating habits. Several of our focus group participants share their views with us in this report. Our research supports insight from Waitrose food and retail experts, along with sales data from millions of purchases throughout the year.

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

FOR FURTHER INFORMATION, PLEASE CONTACT THE WAITROSE PRESS OFFICE ON 01344 825 080

ALSO FEATURED IN THIS REPORT

P5 HOW BRITAIN SHOPS: PURCHASING TRENDS ACROSS THE NATION

P6 THE LUNCHTIME LOWDOWN: WHAT WE'RE EATING ALFRESCO AND ALDESKO

P9 THE GREAT PLASTIC BAG SURVEY: HOW ARE WE TAKING ALL OUR SHOPPING AWAY?

P11 WHAT WE'LL BE EATING AND DRINKING IN 2017: PREDICTIONS FOR THE YEAR AHEAD

P12 OUR FAVOURITE DRINKS: WHAT WE'VE BEEN SIPPING IN 2016

GOING UP WHAT WAS IN FAVOUR IN 2016

FOOD

SEAWEED

A good source of calcium and iron, seaweed is being eaten as 'spaghetti', in salads or as a vegetable. This year's kale

CHURROS

These Spanish doughnuts are a big hit. Martha Collison's recipe is one of the most popular on Waitrose social media pages

WONKY VEG

They've been around for a while but, with Britain's new war on waste, they're experiencing a resurgence

CACTUS WATER

The new coconut water, this berry-tasting prickly pear cactus drink is a low-sugar alternative to other juices

SEEDS AND GRAINS

Sprinkle them over salad or porridge for taste and texture. Buckwheat sales are up 82%, and chia seeds sales by 62%

CHARRED FOOD

We're talking lightly bar-marked, not burnt! And as a result, sales of our wood-fired pizzas soar

COCONUT FLOUR

This gluten-free alternative is high in fibre and protein, and has become a storecupboard staple this year

PICANHA

Sales of this Brazilian rump steak cut rise by 70%. Cook medium or rare on the barbie and serve thinly sliced with lime and chilli

VEGGAN DIET

That's vegan to you and me... but with eggs. It's a hot topic on social media channels this year

BAO BUNS

Street food-inspired Asian steamed buns. Great with pulled pork or caramelised beef strips



TRENDS

1. Express your health

There was a time when healthy eating was a lifestyle choice involving calorie counting, effort and sacrifice. No longer. Today, healthy eating is part of our everyday lives

For an increasing number of us, living and eating well is central to our identity. According to Waitrose research, almost three-quarters of Britons see healthy eating and looking after ourselves as part of who we are. It is one of the ways in which we express ourselves to the wider world.

Faddy diets seem to be on the decline. More than half of those polled said that eating sensibly is part of their daily ritual, rather than something they do reactively or episodically.

Research shows that we're embracing simpler and healthier ways of cooking. Techniques such as steaming or sous-vide – vacuum-packing food then poaching it – are rocketing in popularity, according to Waitrose Executive Chef Jonathan Moore. Our survey found that six in 10 of us eat fresher, lighter foods than we did five years ago. Heavy sauces are out, while simple ingredients and uncluttered dishes are in.

This desire for transparency is even translating to packaging. The design team at Waitrose is seeing increasing demand for see-through packs, as shoppers want to be able to judge the quality of a product for themselves at first glance.

'Health is a way of life. It's an integral part of the way we think and influences the daily decisions we make,' says Natalie Mitchell, Waitrose's Head of Brand Development. Old distinctions are fast disappearing. 'Once, healthy food was deemed bland and unimaginative. Today, people are more likely to perceive healthy food as tasty and tasty food as healthy.'

And the demand for a range of food to suit all diets is here to stay. According to Mintel, UK-wide sales of 'free-from' foods (such as gluten- or lactose-free ranges) are forecasted to grow from £470 million in 2015 to £673 million by 2020 – that's a leap of 43%. One in eight food products launched in Britain in 2015 was gluten-free, up from one in 14 in 2011. And today, we're increasingly eating free-from foods as just one component of a healthy lifestyle rather than due to an allergy or intolerance, Mintel says.

Our health obsession is reflected in the cookbooks we buy. Top-selling titles at Waitrose include *Lean in 15* by Joe Wicks and the *Leon Happy Salads* recipe book.

WHAT THEY'RE SAYING

'Healthy eating has evolved. It is increasingly driven by cooking techniques such as steaming or cooking sous-vide or en papillote'

JONATHAN MOORE, WAITROSE EXECUTIVE CHEF

'Simpler cooking has become a much bigger trend. There has been a move away from heavy dishes. The best chefs are doing as little as they can to really good ingredients'

ROCHELLE VENABLES, EDITOR OF THE GOOD FOOD GUIDE

'I like cleaner flavours. Once you start moving away from the oil and fatty stuff, you don't want to go back because you're more conscious of it'

CAROL, MOTHER OF TWO GROWN-UP SONS

NUMBER CRUNCH



SALES OF GRAIN BAGS WERE SIX TIMES GREATER THAN PREDICTED WHEN THE RANGE LAUNCHED EARLIER THIS YEAR

WE'RE OPTING FOR SMALLER VERSIONS OF TREATS MORE THAN EVER BEFORE – SALES OF MINI HOT CROSS BUNS ROSE BY

165%
AT EASTER



NOVEMBER
28
MEAT FREE

MEAT-FREE MONDAYS ARE ONE OF THE MOST POPULAR COURSES AT WAITROSE COOKERY SCHOOLS

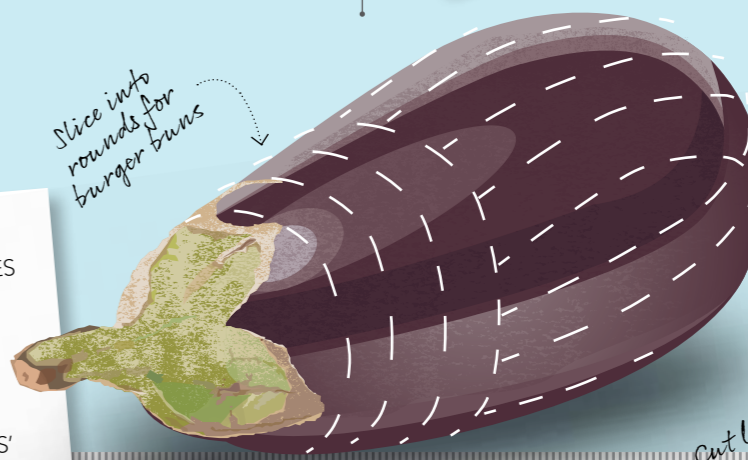
ONLY **30%** OF PEOPLE ADMIT THEY CONSCIOUSLY COUNT CALORIES WHEN THEY TRY TO LOSE WEIGHT. HOWEVER, CALORIE-COUNTING REMAINS TWICE AS COMMON AMONG THOSE UNDER 34 THAN IT IS AMONG THE OVER-55s

60% CLAIM THE FOOD THEY EAT NOW IS FRESHER AND LIGHTER THAN IT WAS FIVE YEARS AGO

71% SAY THAT EATING HEALTHILY AND LOOKING AFTER THEMSELVES IS PART OF WHO THEY ARE

PEOPLE IN YORKSHIRE AND THE HUMBER ARE THE MOST LIKELY TO CLAIM THAT HEALTHY EATING IS PART OF THEIR EVERYDAY LIVES

AUBERGINE IS THE LATEST CARB SUBSTITUTE, WITH SALES RISING BY 18% SO FAR THIS YEAR. THE PURPLE WONDER HAS BEEN REPLACING THE HUMBLE BURGER BUN, AS WELL AS PASTA SHEETS IN LASAGNE. AUBERGINE 'CHIPS' ARE ALSO VERY POPULAR



News bites

JANUARY

DRY JANUARY

The popularity of Dry January is on the rise, with low and no-alcohol options up by **47%** on the last weekend in January. And as cutting back is better than doing nothing at all, sales of small (37.5cl) bottles of wine are up by **37%**.



BURNS NIGHT

Burns supper knees-ups aren't just for Scotland! In fact, they're getting more popular across the UK, with shoppers buying **22%** more haggis this year than last. Veggie haggis is on the up, too, accounting for **25%** of total haggis sales. What would the great poet (left) have made of it all?

FEBRUARY

EASY DOES IT

It seems cold weather means we want to spend less time in the kitchen (more under a blanket, perhaps?). We look for quick and easy options on February nights – the Waitrose Easy to Cook range sees sales grow by **15%**, while prepared vegetables are up **17%**.



CHINESE NEW YEAR WE USHER IN THE YEAR OF THE MONKEY WITH A FEAST OF ORIENTAL FOOD: SALES INCREASE BY **60%** DURING THE CELEBRATIONS.

SHROVE TUESDAY No butts, it has to be better! There's a **77%** increase in home-baking sales as shoppers stock up on pancake-making ingredients.

VALENTINE'S DAY Hopeful lovers take heart! Online flower sales rise by **28%** and, in store, gifts sales are up **35%**.

HALF TERM Help! School's out and the kids need entertaining. A baking boom hits sales of nuts, which are up by **15%**; essences and food colours purchases rise by **8%**; and dried fruit by **81%**. Coconut flour is the must-have baking ingredient, as sales increase by **24%**.

TRENDS

2. HIP FOOD

Thanks to social media, the food on our plates is no longer merely a tasty combination of nutrients or a weekend treat. It's social currency and we're increasingly sharing it with the world

In the past month alone, one in five Britons – that's an impressive nine million adults – has posted a photograph of their food on social media or sent a snap to a friend. It's not just the younger generation, but all age groups, who have caught on to the trend of sharing their food pictures, albeit to varying degrees. The young are the keenest Instagrammers, Facebookers or Pinterest users. One-third of 18- to 24-year-olds has posted a picture of food in the past month – a figure that falls to one in 14 among the over-55s.

The rise of social media has changed our relationship with food. Almost 44% of us make 'a lot' or 'slightly' more effort with our cooking if we think a photo may be posted on social media, our survey found. We've become a nation of food curators, telling the world about who we are via our food choices, through the lens of social media. But it's not all about aesthetics – our survey also discovered that a good-looking plate of food can make eating infinitely more pleasurable.

'Food is about experience and emotion,' says Natalie Mitchell, Waitrose's Head of Brand Development. 'And in a connected world, people want to share that.'

Restaurants are getting in on the act, too, according to Rochelle Venables, editor of *The Good Food Guide*. 'Restaurants today tend to have one dish on the menu that is really Instagrammable and people often go to a specific restaurant just to say they've had that dish,' she says.

But there are downsides to all this sharing. A quarter of us – predominantly 45- to 54-year-olds – are concerned that social media prevents us from living in the moment and engaging with our eating companions.

SPIRALIZERS WERE THE TOP-SELLING KITCHEN GADGET AT WAITROSE THIS SUMMER



NUMBER CRUNCH

PEOPLE FROM SHEFFIELD ARE TWICE AS LIKELY TO HAVE SHARED A FOOD PICTURE ON SOCIAL MEDIA IN THE PAST DAY THAN PEOPLE FROM OXFORD

18- TO 24-YEAR-OLDS ARE FIVE TIMES MORE LIKELY TO HAVE SHARED A PICTURE OF THEIR FOOD IN THE PAST MONTH THAN OVER-55s

9% HAVE SHARED A PICTURE WITHIN THE PAST WEEK

39% OF PEOPLE TAKE GREATER CARE OVER HOW THEY PRESENT FOOD ON THEIR PLATE THAN THEY DID FIVE YEARS AGO



ONE IN FIVE BRITS HAS POSTED A PICTURE OF THEIR FOOD ON SOCIAL MEDIA – OR SENT A SNAP TO A FRIEND – IN THE PAST MONTH

44% ALMOST OF US MAKE MORE OF AN EFFORT WHEN PREPARING FOOD IF WE THINK A PHOTO WILL BE POSTED ON SOCIAL MEDIA



SALES OF PATTERNED BOWLS ARE UP BY 12%

THIS YEAR AT WAITROSE, AS PEOPLE LOOK FOR INSTAGRAM-FRIENDLY WAYS TO PRESENT THEIR FOOD AT HOME

WHAT THEY'RE SAYING

'Food photography is beautiful and now everyone can do it. It's pure and simple expression'

MOIRA HOWIE, WAITROSE NUTRITION MANAGER

'A few years ago, you'd go into someone's home and they'd have cookbooks on their table in the lounge. Now that food has become an internet sensation, we look for recipes online instead'

JONATHAN MOORE, WAITROSE EXECUTIVE CHEF

'I was on a flight last week and got upgraded – so I took a picture of all the food'

LIZ, FORMER FLIGHT ATTENDANT AND MOTHER OF TWO

'When I do rice, I put it in a mould and tip it out... food is more appetising when you make a bit of effort'

ANNE, MOTHER OF TWO GROWN-UP CHILDREN

MARCH

ST PATRICK'S DAY It just wouldn't be the same without Guinness. Sales rise by 40%. Sláinte!



GUINNESS UP 40%

APRIL

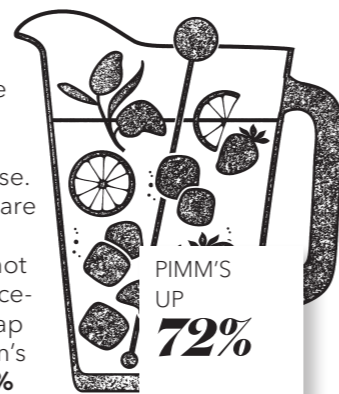
SPRING? Seasonal British favourites, such as Jersey Royals and asparagus, are here, but it's not enough to warm our hearts in this unseasonably chilly month. We lift our spirits by buying plants and flowers instead: horticulture sales grow 11%, and cut flowers are up 20%.



CUT FLOWERS UP 20%

MAY

SPRING! At last, some sunshine arrives. And what do we do to celebrate? We fire up the barbie and invite family and friends over, of course. Barbecue fuel sales are up 95%, barbecue meat is up 41% on hot weekends and service-counter fish sales leap 16%. Beer and Pimm's are up 20% and 72%



PIMM'S UP 72%

respectively, while gin and rosé rise by 15% and 39%. And if we're not enjoying the sun at home, we head out to the park: picnic foods are up, salad sales increase by 12%, soft fruit by 11%, and our Food to Go range by 8%. Naturally, if you're enjoying the garden, you need to spruce it up a bit: outdoor plant sales grow 33%.

HOW BRITAIN SHOPS

Who gets out and about and shops 'til they drop, and who prefers to let technology take the strain? And what about keeping an eye on nutritional information or sustainable sourcing? Waitrose reveals the nation's shopping habits – see whether you fit the trend for your region...



NORTHERN IRELAND

Is shopping something of a hobby in Northern Ireland? Come rain or shine, this region has the highest number of people shopping for food every day.

SCOTLAND

Take a bow, Scotland. You're more likely than anyone else in the UK to check information on sustainable sourcing and animal welfare when buying food.

YORKSHIRE AND THE HUMBER

Customers here love a shopping list – 94% use one when buying food. Whether they stick to it or not is another matter altogether...

EAST OF ENGLAND

East Anglians are the most traditional shoppers among us and like to do one big shop a week. You're most likely to see them in store on Thursdays.

WEST MIDLANDS

Environmentally minded West Midlanders are most likely to go organic, seeking out this information when choosing food.

WALES

The Welsh are the nation's most waste-conscious: they rarely fork out 5p for a plastic bag – they're more likely to remember to bring one from home – and they take the time to check use-by dates on their food.

SOUTH WEST

People from the South West love their gardens – shoppers at Waitrose in Melksham spend more than anyone else on our gardening range. It's also one of our most popular online shopping regions – perhaps because they're so busy in the garden.

CHANNEL ISLANDS

There's no time to waste idling in line on the Islands – Waitrose St Saviour, Jersey, has the country's highest number of customers using Quick Check 'scan as you shop' technology – and they love to support local food and drink producers, too.

LONDON

Shopping for groceries online is most common among these time-pressed city dwellers – but they make time for their five a day, buying more fruit, veg and salads from Waitrose than shoppers anywhere else in the UK.

Trolleys at the ready

While we have the odd regional peculiarity, there are certain traits that all British shoppers share

STOCKING UP

Nationwide, Friday is the most popular day for the big shop, with 14% of customers preferring to get their groceries in ahead of the weekend. However, more than half of us visit the supermarket two or three times a week for a top-up, and a further 7% shop daily.

FORGET-ME-NOT

...These repeat trips can't be because we've forgotten something, though – we are a nation of list-makers. Only 12% of UK shoppers never use a shopping list.

WHAT'S IN A LABEL?

We take time over our shopping; checking the origin of our food is important to 25% of us, while 20% actively consider animal welfare standards.

HEALTH IS A PRIORITY

As a nation, our own waistlines and wellbeing come first: nearly a third of us look for nutritional information when choosing our food.

MARS VS VENUS

But there remains some differences between the nation's shoppers, and the split is along gender lines. Did you know, for example, that across the nation, regardless of the time of day, you're more likely to see women than men in the supermarket on... Thursdays? Women also confirmed that they are the most careful and systematic grocery shoppers, being more likely to check pricing and offers, nutritional and animal welfare information, and use-by dates than men.

THE LUNCHTIME LOWDOWN

Waitrose research and sales data have revealed that what shoppers buy for lunch and where they eat it are influenced by many factors, including the job they do, their age and where they live. Take a look to see how your lunchtime ritual fits with the trends we've spotted across the nation

What's for lunch?

SALES OF SUSHI HAVE SHOT UP BY **20%** THIS YEAR

WORKERS FROM THE MIDLANDS AND THE SOUTH EAST GO LOOPY FOR SUSHI, WHILE THOSE IN THE WEST COUNTRY HAVE YET TO CATCH THE BUZZ

SALAD SALES HAVE ALSO RISEN BY

10% LONDONERS ARE MOST LIKELY TO PICK UP A LEAFY SALAD FOR LUNCH, WHILE WORKERS FROM EAST ANGLIA AND THE MIDLANDS PREFER PASTA SALADS



NEARLY **2/3** OF US CHOOSE SUGARY DRINKS OR HOT BEVERAGES AT LUNCHTIME, WHILE ONLY **1/3** DRINK WATER



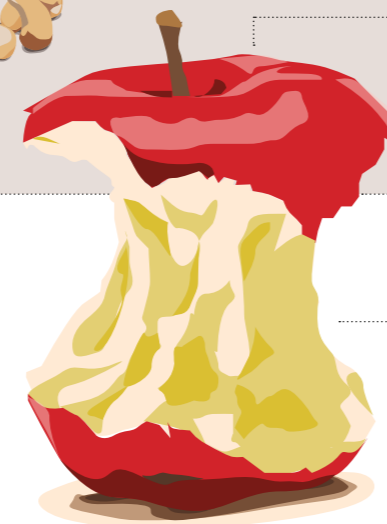
ONE IN FIVE PEOPLE EAT CHOCOLATE AT LUNCHTIME. 18- TO 24-YEAR-OLDS ARE THE MOST LIKELY TO SUCCUMB - BUT THIS AGE GROUP IS ALSO THE MOST LIKELY TO INCLUDE RAW VEGETABLES IN THEIR LUNCHBOX

ALMOST 10% SAY THEY EAT NUTS AND SEEDS EACH DAY AS PART OF THEIR WORKING LUNCH - THOSE FROM LONDON AND EAST ANGLIA ARE THE MOST ENTHUSIASTIC NIBBLERS



MORE THAN **1/3** OF WORKERS SURVEYED SPEND LESS THAN £1 ON THEIR LUNCH EACH DAY

WEST MIDLANDERS ARE THE MOST FANATICAL ABOUT FRUIT, WHILE SCOTS ARE MOST LIKELY TO FORGO IT ALTOGETHER



HALF OF WORKERS REGULARLY INCLUDE A PIECE OF FRUIT IN THEIR LUNCH, WITH TEACHERS AND OVER-35s THE MOST COMMITTED TO THEIR FIVE-A-DAY

SANDWICH SALES INCREASED BY **5%** NATIONWIDE THIS YEAR - THE UK'S MOST POPULAR FLAVOURS ARE PRAWN MAYO AND SMOKED HAM AND CHEESE



THOSE IN THE SOUTH WEST OF THE COUNTRY ARE MOST LIKELY TO OPT FOR A VEGETARIAN SARNIE FOR LUNCH

LONDONERS HAVE A SOFT SPOT FOR OUR SMOKED SALMON AND CREAM CHEESE SANDWICH, AND OUR CHICKEN AND AVOCADO COMBO

NORTHERN IRELAND'S WORKFORCE IS MOST LIKELY TO LEAVE THE OFFICE AT LUNCH - BUT THIS IS USUALLY IN ORDER TO BUY SOMETHING TO POLISH OFF ON THE WAY BACK TO THEIR DESK...

LONDONERS ARE CHRONICALLY DESKBOUND - THEY'RE THE MOST LIKELY TO EAT LUNCH IN FRONT OF THEIR SCREENS THAN WORKERS ANYWHERE ELSE IN THE COUNTRY



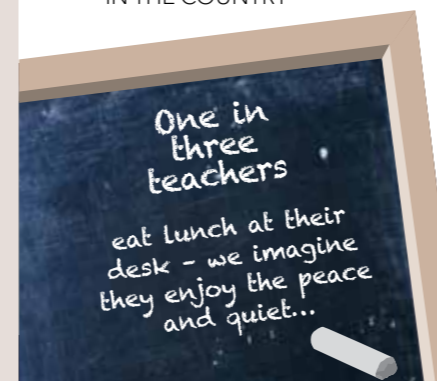
SOMEWHAT IRONICALLY, HOME WORKERS ARE THE LEAST LIKELY TO HAVE THEIR LUNCH OUTDOORS

AGE ALSO DETERMINES WHERE YOU EAT LUNCH

ALMOST **31%** OF 18- TO 24-YEAR-OLDS

AND **48%** OF 35- TO 44-YEAR-OLDS STAY AT THEIR DESKS

ALMOST **60%** OF OFFICE WORKERS ADMIT TO EATING AT THEIR DESKS



Alfresco vs aldesko

Lunching in front of a screen, or on the go, has increasingly become part of British work culture, as our research confirms

Take a break

Who's got the time for an hour-long lunchbreak these days? Not many, it seems...



ONLY **13%** OF US TAKE A FULL HOUR FOR LUNCH

25% OF WORKERS IN THE UK TAKE LESS THAN 20 MINUTES FOR THEIR LUNCH EACH DAY

OVER 55s ARE TWICE AS LIKELY TO TAKE A LUNCH BREAK THAN THEIR 18- TO 24-YEAR-OLD COLLEAGUES



DEDICATED FOLKS IN YORKSHIRE AND THE HUMBER ARE LEAST LIKELY TO STOP FOR LUNCH

JUNE

GAME ON It's another opportunity to kick back with friends. The **UEFA European Championships** and **Rugby union internationals** see beer sales up almost **9%**.

ENGLISH WINE WEEK IT'S GOOD TO SEE SHOPPERS SUPPORTING THIS BRILLIANT INDUSTRY: SALES OF ENGLISH WINE INCREASE BY **31%**.



JULY

MORE FUN AND GAMES Wimbledon and the **UEFA finals** see sales of Champagne up by **19%**, but we love Prosecco and cava, too: sparkling wine as a whole is up **27%**.

SPARKLING WINE SALES UP **27%**

FESTIVAL SEASON

AND IT'S A WET ONE, BUT WE'RE NOT A NATION TO BE EASILY DETERRED. UMBRELLAS AND PONCHO SALES ARE UP BY **150%**.



AUGUST

THE HEAT IS ON It seems rosé is the drink of choice this summer - sales are up a massive **104%**, led by the 'frosé' trend. That's a frozen cocktail of rosé, lemon juice and sugar, if you didn't know...

ROSÉ UP **104%**



AFTER THE DELUGE

In typical fashion, festival goers return home caked in mud and the sun finally appears. We cool down with sorbets - sales increase by **49%**. And many of us are making them ourselves: searches on waitrose.com for kiwi sorbet and lemon sorbet increase by **37%** and **24%** respectively.

SORBET UP **49%**



VIVA BRAZIL

The nation embraces the carnival flavours of Brazil as the opening ceremony of the **Rio 2016 Olympic Games** kicks off. The classic Brazilian cocktail is clearly a winning choice, as Leblon Cachaça - the go-to spirit if you're making a **caipirinha** - outsells Pernod and Sambuca. Food-wise, the Brazilian-style steak, **picanha** (pronounced pee-kahn-yah), is proving really popular, with sales up by a fifth during the games.



SEPTEMBER

INDIAN SUMMER Summer continues to sizzle with temperatures soaring to record levels - **34.4°C** in Gravesend, Kent. In an impressive attempt to make the most of alfresco eating, barbies across the country are fired up, and sales of grill-worthy halloumi and Instagram fave, avocados, both rise by **32%**.

TRENDS

3. THE CONSCIOUS CONSUMER

When it comes to the environment, doing the right thing has become second nature to many. More aware of the issues concerning our food and lifestyle choices, we're even defining ourselves by our 'conscious consumption'

Our research found that 80% of us actively consider how and where our food is sourced when shopping. And a third of us care more about the environment and society than we did five years ago. We throw away less food and freeze more.

According to our poll, 46% of us discard fewer leftovers than we did five years ago, and this rises to 50% among 18- to 24-year-olds. Just think of the ongoing popularity of smoothies, which allow us not only to use up surplus fruit and veg, but also provide a short cut to consuming our five-a-day.

Meanwhile, a third of us freeze more food than we did five years ago. In fact, batch cooking and freezing what we don't eat is no longer seen as simply prudent – for many it's a daily ritual, a time- and money-saving choice.

'Consumers are doing what's intrinsically right,' says Natalie Mitchell, Waitrose's Head

of Brand Development. 'We're living in an era when people are walking the walk, not just talking the talk.'

There are many reasons behind the rise in conscious consumption: the desire to save money, concerns about the world's resources, mistrust around the ability of institutions to take responsible decisions on our behalf, and the feeling that it's the right thing to do.

This trend has fed into the way retailers sell food. Packaging is being designed to prevent waste in the home, and single serving sizes are on the rise. Nearly half of us say more frequent shopping trips for a smaller amount of food has helped further to cut down on waste. What's more, small stores are not simply for 'convenience' foods any more: for the most part, the best-selling products are best-sellers in Little Waitrose, as well as in our larger stores.

NUMBER CRUNCH

MANY OF 2,500 LOCAL AND REGIONAL PRODUCTS IN WAITROSE REGULARLY OUTSELL THEIR EQUIVALENT BIG-BRAND PRODUCTS IN THAT SHOP

SALES OF BAGS OF ORGANIC SALAD ARE UP BY 7% THIS YEAR SO FAR, AS PEOPLE THINK MORE ABOUT HOW THEIR FOOD IS GROWN. ORGANIC BEAUTY PRODUCTS ARE UP 33%



DO YOU EVER CONSIDER HOW OR WHERE YOUR FOOD IS SOURCED?



WHAT THEY'RE SAYING

'People are "reducing or re-using" food. They're not prone to over-buying. They're conscious of waste and they make food last longer through imaginative use of leftovers and methods of cooking'

MOIRA HOWIE, WAITROSE NUTRITION MANAGER

'Shoppers in central city areas tend to use convenience stores almost as they would a fridge – somewhere to "store" food until needed. They see it as a way to manage spending and to reduce waste'

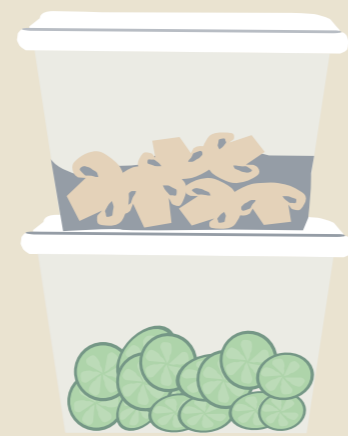
TOR HARRIS, WAITROSE HEAD OF SUSTAINABILITY AND RESPONSIBLE SOURCING

'I go to my parents' home and see so much waste – frozen berries stuck to the back of the freezer and out-of-date food in their fridge'

TIM, STOCKBROKER, LIVES IN LONDON WITH HIS GIRLFRIEND

34% OF US FREEZE MORE FOOD THAN WE DID FIVE YEARS AGO

SALES OF FOOD STORAGE CONTAINERS ARE UP BY **37%**, AS MANY KEEP THEIR LEFTOVERS FOR ANOTHER MEAL

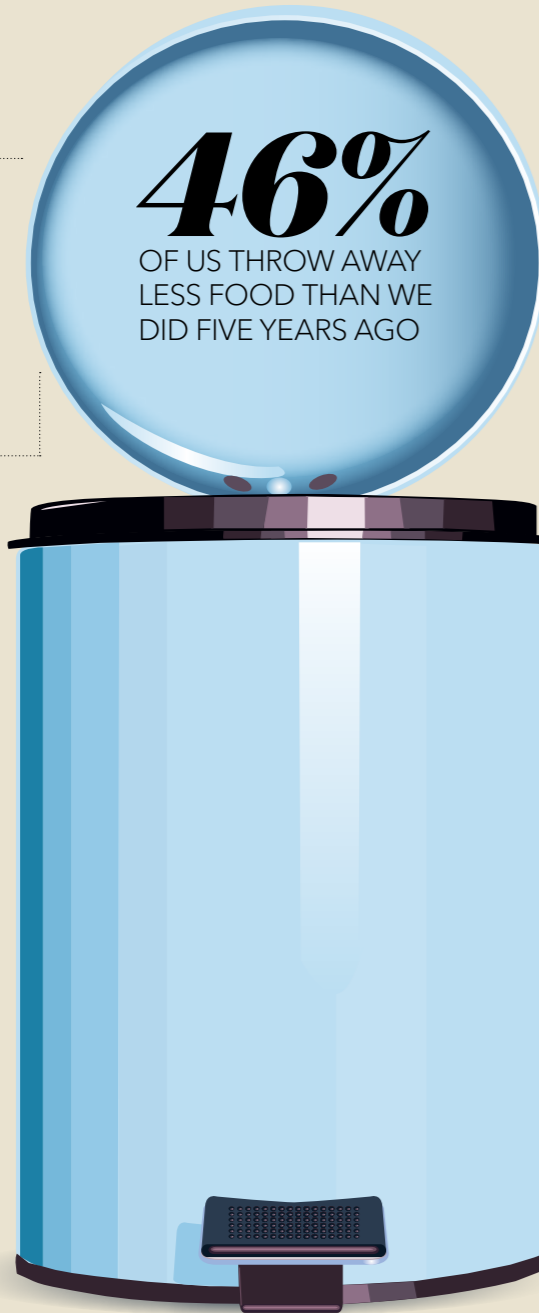


30% OF PEOPLE CARE MORE ABOUT THE ENVIRONMENT AND SOCIETY THAN THEY DID FIVE YEARS AGO

45% OF PEOPLE SAY THAT POPPING LESS INTO THEIR BASKETS, BUT SHOPPING MORE FREQUENTLY, HAS HELPED THEM TO CUT DOWN ON WASTE

87% OF PEOPLE SOMETIMES OR ALWAYS USE A SHOPPING LIST

MICROBEADS BECAME A HOT TOPIC ON WAITROSE SOCIAL MEDIA CHANNELS THIS SUMMER WHEN WE ANNOUNCED WE WERE TO STOP SELLING PRODUCTS THAT CONTAIN THEM



PEOPLE IN THE SOUTH WEST ARE THE UK'S MOST FORGETFUL WHEN IT COMES TO BRINGING THEIR OWN SHOPPING BAG. THEY'RE THREE TIMES MORE LIKELY TO FORGET A BAG EVERY TIME THAN THOSE LIVING IN THE NORTH EAST

MEN ARE MORE LIKELY THAN WOMEN TO CARRY FOOD HOME LOOSE IN THEIR ARMS IF THEY FORGET A BAG – 22% VS 15%

18- TO 24-YEAR-OLDS ARE FIVE TIMES MORE LIKELY TO FORGET A BAG EVERY TIME OR NEARLY EVERY TIME THAN THOSE OVER 55

WHILE

THE OVER-55s ARE THE MOST LIKELY TO LEAVE A SHOP EMPTY-HANDED DUE TO FORGETTING A BAG



THE GREAT PLASTIC BAG SURVEY

Recent research found that plastic bag usage has plummeted since the Government introduced a 5p charge for bags in England in October 2015, bringing it in line with the rest of the UK. But our survey discovered that one in five Britons still forgets to bring their own bags with them most times they shop



WHEN YOU FORGET TO BRING A BAG, WHAT DO YOU DO?

PAY 5P FOR ONE 30% FORK OUT FOR A PLASTIC BAG

BUY A BAG FOR LIFE 31% INVEST IN SOMETHING STRONGER

CARRY THE SHOPPING LOOSE IN MY ARMS 18% RISK IT!

PUT THE FOOD IN MY HANDBAG/WORK BAG 16% IMPROVISE

LEAVE THE SHOP WITHOUT BUYING ANYTHING 1% JUST GIVE UP



ACCORDING TO DEFRA STATISTICS, BRITISH SHOPPERS ARE SET TO TAKE HOME SIX BILLION FEWER SINGLE-USE CARRIER BAGS IN 2016. THAT'S AN **85%** USAGE SINCE THE CARRIER BAG CHARGE WAS INTRODUCED LAST YEAR.

In the bag

We've come full circle with our shopping bag habit: from our grandparents bringing their own to the convenience of disposables to reusing bags again



1937
The earliest Waitrose bag held by the John Lewis Partnership archive displays the company's royal warrant, along with a portrait of King George VI.

1962
Waitrose starts selling plastic bags for 1p.

1972
Customers put their pennies away as the charge for plastic bags is shelved.

1997
Waitrose is the first supermarket to sell a reusable 'Bag For Life', costing 10p. The heavy-duty plastic bags last for an average of nine shopping trips.

2007
The revolutionary biodegradable jute bag is launched.

2016
With 63% of us rarely or never forgetting to bring our own bags when we shop, our communities will be cleaner and marine life safer. Hurrah for the environment!

TRENDS

4. IN IS THE NEW OUT

The lines between eating out and in are blurring. We're learning to make a night in an occasion, when we're in charge of the ambiance, as well as the food, and nobody has to drive home afterwards

Four in 10 of us see going out for a meal as less of a treat than we used to. The rise in affordable and healthier casual dining options means eating out is not always a special occasion. Today, trendy restaurants are about small-plate informal grazing or large sharing platters, both of which are easily replicable at home. This is in stark contrast to the fine dining, formal waiters and starched tablecloths of old, and has led to a blurring of the lines between 'out' and 'in'. Eating at home is also invariably cheaper.

So, what is so attractive about staying in? It's about control and indulgence. At home, we can set the atmosphere, be ourselves and curate the perfect meal, whereas if we go out, we may encounter indifferent food, poor service or noisy restaurants. Our survey backs this up with a quarter of Britons saying they'd rather stay in than go out when spending quality time with a partner. Our kitchens are creative spaces, where we enjoy spending time cooking, whether we're entertaining friends, bringing the family together or indulging a loved one.

The trend for creating special meals at home is growing. Eleni Tzirki, head chef at the Waitrose King's Cross Cookery School, says that demand for the Couples Kitchen and Dinner For Friends courses is increasing. Our research suggests that when people entertain at home, they see it as an event. In the past year, four in 10 of us have either been to or hosted a *Come Dine With Me*-style revolving dinner party - a dinner party where everyone brings a dish - or a themed evening based around a holiday destination or cooking style.

Also, as many of us lead busy lives, we sometimes just want to chill at home. We can decompress with partners or family without having to worry about what we're wearing or who has to drive. Indulgent 'chill nights', when we stay in and spend a bit more on food than we normally would, seem to be rising in popularity, challenging the traditional 'date night' out.

WHAT THEY'RE SAYING

'When you eat in, you're not being limited by the choices of the restaurant; you can choose what you're shopping for and splash out on a really nice bottle of wine'
 NATALIE MITCHELL, WAITROSE HEAD OF BRAND DEVELOPMENT

'The trend away from noise-reducing furnishings towards an industrial aesthetic and hard surfaces has made for noisier restaurant experiences all round. The Good Food Guide flags up restaurants that play background music, as we know this information is important to many diners'
 ROCHELLE VENABLES, EDITOR OF THE GOOD FOOD GUIDE

'You can experiment a bit more when you're cooking at home. It doesn't matter if it goes wrong'
 MOIRA HOWIE, WAITROSE NUTRITION MANAGER

'The food is better at home, the wine is our choice and you don't have to worry about driving'
 CAROL, MOTHER OF TWO GROWN-UP SONS

'In our courses, we try to make dishes that are a bit more advanced and create more of a wow factor when people are trying to impress friends and family'
 ELENI TZIRKI, HEAD CHEF AT WAITROSE KING'S CROSS COOKERY SCHOOL

'I remember, as a kid, that eating out was a big deal. But, nowadays, I eat out two to three times a week. It's not a special occasion any more'
 TIM, STOCKBROKER, LIVES IN LONDON WITH HIS GIRLFRIEND

'As eating out has become more commonplace, the expectation of high-quality food at home has risen. It's about everyday treats'
 ROCHELLE VENABLES, EDITOR OF THE GOOD FOOD GUIDE

NUMBER CRUNCH

39% OF PEOPLE SEE EATING OUT AS LESS OF A TREAT THAN THEY USED TO

AT HOME, WE CAN SET THE ATMOSPHERE AND BE OURSELVES
61%

HOME IS CHEAPER
54%

WE DON'T HAVE TO DRESS UP
42%



IF YOU PREFER TO STAY IN, WHY IS THIS?

I DON'T LIKE HAVING TO DRIVE TO A RESTAURANT
16%

RESTAURANT FOOD IS HIT AND MISS
22%

THE FOOD IS BETTER
34%

ALSO ON THE MENU...

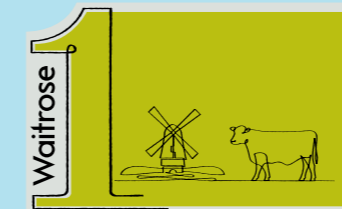
FOOD ORDERING SERVICE WAITROSE ENTERTAINING SALES HAVE INCREASED BY 14% SO FAR THIS YEAR

WAITROSE COOKERY SCHOOLS HAVE LAUNCHED A 'DINNER FRIENDS' COURSE IN RESPONSE TO DEMAND FOR LEARNING TO COOK AN IMPRESSIVE MEAL TO ENTERTAIN GUESTS AT HOME



A RISE IN INFORMAL DINING OUTSIDE OF THE HOME RESULTS IN 'GRAZING' OPTIONS IN WAITROSE SHOPS AND CAFES RISING BY 7%

ONE IN 10 PEOPLE HAVE BEEN TO A 'COME DINE WITH ME'-STYLE REVOLVING DINNER PARTY. THESE ARE MOST POPULAR IN NORTHERN IRELAND, AND AMONG 18- TO 24-YEAR-OLDS



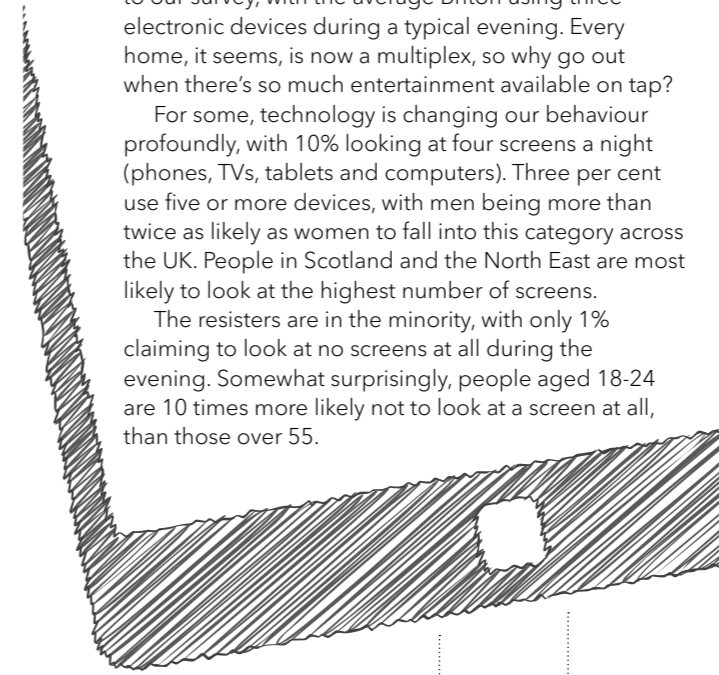
SALES OF THE PREMIUM FOOD RANGE, WAITROSE 1, ARE UP BY 20% SINCE LAUNCHING IN MAY, AS CUSTOMERS PREPARE SPECIAL MEALS AT HOME

EVERY HOME A MULTIPLEX

Multi-screening has become a way of life, according to our survey, with the average Briton using three electronic devices during a typical evening. Every home, it seems, is now a multiplex, so why go out when there's so much entertainment available on tap?

For some, technology is changing our behaviour profoundly, with 10% looking at four screens a night (phones, TVs, tablets and computers). Three per cent use five or more devices, with men being more than twice as likely as women to fall into this category across the UK. People in Scotland and the North East are most likely to look at the highest number of screens.

The resisters are in the minority, with only 1% claiming to look at no screens at all during the evening. Somewhat surprisingly, people aged 18-24 are 10 times more likely not to look at a screen at all, than those over 55.



'My children are on their devices all the time. They even have the watches. Technology has completely taken over'

ANNE, MOTHER OF TWO GROWN-UP SONS WHO LIVE NEARBY

'They bring their iPads down for breakfast'

CLAUDINE, MOTHER OF TWO SONS AGED 10 AND 12

'I had friends over and they were asking what the Wi-Fi code is. It's so rude'

CLAUDINE, MOTHER OF TWO SONS AGED 10 AND 12

'You can't commit because you're half watching TV, half cooking and half texting. You aren't committing to anything'

TIM, STOCKBROKER, LIVES IN LONDON WITH HIS GIRLFRIEND

9PM IS THE MOST POPULAR TIME FOR PEOPLE TO DO THEIR WAITROSE ONLINE SHOP

What we'll be eating and drinking in 2017

Polynesian food
 Hawaiian poke (pronounced *POH-keh*) - a raw fish salad marinated with lime, soy and sesame, and often served with rice - looks likely to be next year's must-eat snack, like sushi was 20 years ago.

Lighter eating
 It's all about eating healthily. The lighter, fresher and brighter the ingredients the better. Swap heavy cream sauces, for example, for vegetable purées.

Foodie meal kits
 Feeling time-strapped, but love to cook? Gourmet meal kits with premeasured, prepped ingredients and a recipe, and even simpler self-assembly 'ready-meals', are having a moment right now. Cooking from scratch like a pro has never been easier. It's a trend we think will run and run.

Vegetable yogurt
 In the US, they're infusing the flavours of carrot, beetroot, sweet potato and tomato into yogurt for a savoury (with a hint of sweet) accompaniment to all sorts of food. It won't be long before we're adding it to our weekly shop...

Perfume-inspired cocktails
 The folks at the Café Royal paired up with Givenchy this summer to create 10 fragrance-led cocktails. You pick your favourite scent from those kept behind the bar and then get to sip on the corresponding cocktail. Botanical bliss. Hopefully coming to a bar near you next year.



Watermelon water
 Beyoncé (pictured left) bought a stake in WTRMLN WTR in May. With such star backing, could cold-pressed watermelon juice be 'the future of clean, natural hydration'? Watch this space.

Occasional extreme indulgence

The fact that we're more likely to eat healthy food gives us the excuse to indulge now and then... This year, the photogenic 'freakshake' took centre stage. This Australian invention of milkshake piled high with brownies, cream, cookie dough and marshmallows, is currently all over Instagram. Will we be tucking in again in 2017 or moving onto the next extreme indulgence?



FOR MORE INFORMATION ON KEY TRENDS, CONTACT THE WAITROSE PRESS OFFICE ON 01344 825 080.

Technology through the decades

TECHNOLOGY HAS REVOLUTIONISED THE WAY WE SHOP. HERE ARE JUST SOME OF THE CHANGES THAT HAVE TAKEN PLACE OVER THE PAST 40 YEARS

1976 Waitrose introduces electronic cash registers for the first time in its new Brent Cross store in London.



1986 Small computers are introduced in stores to help with stock management. And while the majority of Partners are still paid by cheque, some are paid electronically for the first time.

1996 'Call and collect' and 'delivery to work' home-shopping services are trialled. In-house magazine, *The Gazette*, publishes an article with the headline: 'What is the internet, where

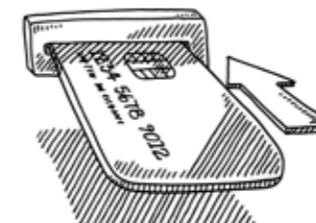


did it come from, and how does it work? Aspiring "surfers" should read on.'

2001 Launch of online shopping at Waitrose.

2002 Quick Check, the scan-as-you-shop service is introduced into stores.

2006 Shops across the country complete the roll-out of 'chip and pin' payment systems.



2016 All Waitrose stores offer contactless and mobile payments, including a new scan-as-you-shop app on your mobile, and the first cashless store opens in Sky TV's headquarters in west London.



HOW HAS SHOPPING CHANGED IN THE PAST 20 YEARS?

THAT WAS THEN

IN JUNE 1996, THE TIMES REPORTED: Most people shop once a week (51%), with only 14% of people shopping two or three times, and 3% of people every day.

The most popular day for shopping is Friday (21% of people), followed by Saturday (16%) and Thursday (15%).

According to Defra, in 1996, about 17% of household income was spent on food and drink.

THIS IS NOW

TODAY, OUR RESEARCH SHOWS THAT: Most people shop two or three times per week (51%), with 35% of us shopping once a week and 7% every day.

A third of us don't have a favourite day to shop, but Friday and Saturday are still the most popular with those who do. 14% of shoppers favour each of these days.

According to Defra, today 12% of our household income is spent on food and drink.

Our favourite drinks

Customers are branching out, mixing and blending their drinks, and taking self-expression to new levels as they do so, says Pierpaolo Petrassi MW, Head of Buying, Beers, Wines and Spirits



This year in drinks, anything goes. Blending, experimenting and exploring are on the rise as customers rip up the rulebook in their quest for self-expression.

The choice of flavours and serving options available to people has never been greater. This trend is most visible in spirits. Drinks are no longer necessarily served in a tumbler over ice; people are creating their own signature cocktails with fresh fruit, garnish and herbs. It's all pretty funky and it's all absolutely acceptable. Whether people like Japanese whiskey, premium tequilas or niche bourbons, they are enjoying expressing themselves. There has been a real blending of flavours and categories. This year, we started selling Seedlip, a zero-alcohol spirit with a mellow botanical flavour.

Brewers of craft beer are discovering interesting new directions. Rather than simply

adding bitterness, hops are now being used to add sweet fragrances. Again, people can choose the beer – or cider – that best reflects their personality. The growth of craft beer often comes with a community benefit: many small brewers are located close to stores in which their products are sold and are therefore engaged with their local communities. More than ever, people enjoy visiting and having a direct experience of the brewery, cider-maker, vineyard or distillery. This sense of place is central to their story-telling, and is an important part of their self-expression.

While people still enjoy classic wines, they are exploring new and different regions. Gavi, Grüner Veltliner and Albariño are growing in popularity. At the same time, old classics such as Côtes du Rhône remain strong, and dry rosés continue to increase in popularity.

As seen in the rest of this report, health plays a growing role in our drinking choices. People want to consume worthy calories, and they want to tell friends about who they are by their choice of drink.

In short, people today want an experience that is about more than just buying a product from a supermarket. That's why in September we held our inaugural Waitrose Drinks Festival, where thousands of our most loyal and engaged customers met our winemakers, distillers and brewers. The festival featured food, too. The aim was to reduce the distance between consumers and suppliers, to share incredible tastes with our customers and to allow Waitrose shoppers to learn more about where our products come from.



PEOPLE CAN CHOOSE THE BEER – OR CIDER – THAT BEST REFLECTS THEIR PERSONALITY

Raise a glass to G&T

When it comes to putting their own twist on a drink, more and more people are embracing gin. The spirit has become this year's tippie of choice, with sales up by 34% compared to 2015. Premium varieties are particularly popular and, often handcrafted by small producers in niche distilleries, they each come with their own unique story to tell. Popular brands include Opihr Oriental Spiced Gin, which contains Indonesian cubeb berries and Moroccan coriander, Copper House Dry Gin, from coastal brewer Adnams, and Audemus's Pink Pepper Gin, distilled in France

by an Australian. Sold in beautiful bottles, each has a different flavour profile and each is infused with a variety of botanical flavours and citrus notes.

But it isn't just about the gin: a vast array of mixers and aromatic tonic waters means that personalisation can be taken to higher levels. 'Increasingly, people want to find flavours of their own volition, rather than be told what to drink,' says Anne Jones, Category Manager, Wines, Beers and Spirits at Waitrose. The humble G&T is fast becoming the ultimate vehicle for self-expression.

WAITROSE NOW SELLS **43** DIFFERENT TYPES OF GIN

THIS SUMMER, THE TOP THREE SELLING SPIRITS AT WAITROSE WERE ALL GIN, WHICH ACCOUNTED FOR **1/3** OF ALL SPIRIT SALES

IN DECEMBER 2015, MINTEL REVEALED THAT MORE THAN HALF OF GIN DRINKERS ARE UNDER **35**

BOTANICAL MIXERS, SUCH AS FEVERTREE, ARE **17%** UP THIS YEAR



The humble G&T is fast becoming the ultimate vehicle for self-expression

OFTEN HANDCRAFTED AND UNIQUE, PREMIUM GINS HAVE BECOME A TIPPLE OF CHOICE



drinkaware.co.uk for the facts

GOING UP WHAT WAS IN FAVOUR IN 2016

DRINK

WHISPERING ANGEL ROSÉ

Sales of pale, dry rosés are up by 14% this year, led by this crisp, clean favourite with a hint of peach

JAPANESE WHISKY

Imported whisky hits the spot as people discover and embrace new flavours. Malts from Japan are among the best

PIGNOLETTO

Frothy and sherbety, this Italian sparkling wine is becoming a popular alternative to Prosecco

CRAFT BEER IN CANS

Craft beer continues to grow. Cans – more carbon efficient and easier to store than bottles – prove particularly popular

GAVI

The new sauvignon blanc. This dry, fruity Italian wine, which goes well with fish, is fast becoming a staple

SNOWBALL

The 70s favourite of brandy-based Advocaat, lemonade and lime is back. Don't forget the glacé cherry on top!

BEAUJOLAIS NOUVEAU

Released for sale on the third Thursday of November, this fruity red has had a few good vintages on the trot. Deliciously gluggable

PREMIUM BOURBON

Versatile and flavoursome bourbons from niche distilleries are enjoying strong sales

SEEDLIP

This distilled alcohol-free spirit is made with botanicals, such as lemon, cardamom and all spice. Niche, but growing

WANT TO USE OUR ILLUSTRATIONS?

To reproduce some of the illustrations featured in the Food and Drink Report for free, please contact the Waitrose Press Office on 01344 825 080. To download the report as a pdf, visit waitrose.com/foodreport.