



THE Waitrose FOOD AND DRINK REPORT

2015

'In a world of endless options, the majority feel the need to reimpose boundaries when it comes to family life'



2015: what we eat now

Today's 'open all hours' culture means that traditional ways of doing things are disappearing fast. Latest research from Waitrose has identified six key trends, with households imposing new boundaries in family life as they navigate this sea of unlimited choice



Think about life in the second half of the 20th century. Households tended to do a weekly food shop, they watched one of just a handful of TV channels, they ate together and they connected with friends via landline telephone or letter. Seems almost quaint, doesn't it?

By contrast, life in 2015 is an endless stream of information and interactions. We can watch any TV show or listen to any song that we want to at the touch of a button. We can buy anything online 24/7. We eat more 'on the go'. And, due to social media, emails and texts, we can connect with friends and family every waking minute. Today, we are constantly 'on'. Those old boundaries that existed have, by and large, gone the way of the cathode ray TV: into the dustbin of history.

Mark Price

'As society changes, so does the nature of shopping. It is more informal and flexible than ever before'

MARK PRICE, MANAGING DIRECTOR

The facts and figures

Waitrose carried out extensive research into the year's top food trends in summer 2015.

We conducted a series of focus groups, asking people from all over the country about their shopping, eating and cooking habits (and how they interact with family members and flatmates in the kitchen!) over the past year. This was followed up with widespread consumer

research - a further 2,000 people of all ages were polled on an extensive range of food-related topics.

Our research supports insights from Waitrose's retail and food experts, as well as our sales data and internal customer research.

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...

P6: DUNK YOUR WAY AROUND THE UK: BISCUIT TRENDS ACROSS THE NATION

P11: SHOPPING ALL OVER THE WORLD: WHAT WAITROSE IS EXPORTING AND TO WHERE

P12: OUR FAVOURITE DRINKS: WHAT WE'VE BEEN IMBIBING IN 2015

GOING UP WHAT WAS IN FAVOUR IN 2015

FOOD

AVOCADO
UK sales have risen by 24% this year (Nielsen) - and our juice bars recently started selling avocado smoothies

PRE-CHOPPED FROZEN FRUIT
The juicing trend has seen sales of these convenient packs soar

BONE BROTH
This rich, yet healthy flavourful reduction is making its way onto trendy restaurant menus

MARSHMALLOWS
Marshmallow recipe downloads have risen by 300% on waitrose.com

CAULIFLOWER
Whizzed up in a food processor, cauliflower is increasingly used as a healthy substitute for rice or even pizza bases

ALMOND MILK
Sales at Waitrose have overtaken soya milk for the first time

COURGETTES
The spiralizer craze to turn this staple vegetable into 'courgetti' has boosted sales

SAGANAKI KEFALOTYRI
A rival to halloumi, this Greek cheese is delicious flambéed or fried

CHIA
This healthy, flowering member of the mint family is grown for its seeds. Sprinkle over porridge and smoothies

RAPESEED OIL
Has overtaken olive oil as the fastest-selling oil in the UK*

CAVOLO NERO
Black kale... grown in Tuscany, loved in the UK

COCONUT
A big hit with clean-living advocates, coconut-related products fly off the shelves

KIMCHI
This fermented Korean pickle is spicing up kitchens across the UK

*Kantar Worldpanel

TRENDS

I. Overwhelmed by choice

In a world where we can have it all, people are choosing to redefine their options in an attempt to reclaim control

In modern life we are bamboozled by options. Thanks to technology, we can connect with everyone, check websites, listen to any song or buy any product we want at the swipe of a screen. As barriers that once limited our behaviour have fallen, we have never had so many options open to us. As a result, life has never been more flexible and informal.

Six in 10 of us say the amount of choice has increased over the past five years. However, almost two-thirds admit to feeling challenged by it. And, curiously, it's youngsters aged between 18 and 24, who you might think would be open to change, who feel this pressure the most.

So how do we cope? According to our research, 65% of people say they reimpose boundaries at home to introduce control in an age when we can have it all. Of those who do this, six in 10 families ban gadgets at the table and over half make sure they eat together as a family at certain times, either informally at home or dining out. Three in 10 families agree to turn devices off for a fixed period before they go to bed.

There is a generational difference between the rules parents choose to enforce, with 74% of parents aged 45-54 insisting on no gadgets at the table, compared to 45% of parents aged 18-24. Meanwhile, one in seven families arrange one night a week when the children do no organised activity. The rise of the activity-free day or 'Nothing Tuesday' culture perhaps best reflects how we respond to life's pressures.

'Reimposing boundaries is about wanting to retain the essence of family life. People are social animals and what they're saying is: "This is family time for us to connect. If you have a gadget at the table you're connecting with other people instead of family"'

CLARE GOUGH, WAITROSE HEAD OF CUSTOMER INSIGHT

'We launched Pick Your Own Offers in June. Customers choose 10 products they'd like to save money on every time they shop at Waitrose. People tell us they appreciate having fewer decisions to make - and like knowing their favourites will always be on promotion. So far more than 850,000 have signed up'

LEIGH RENGGER, HEAD OF CUSTOMER LOYALTY

WHAT THEY'RE SAYING

'We're now seeing some restaurants offer a no-choice or very limited menu with just three or four options per course focused on seasonal ingredients. The simplified choice can be very attractive to diners happy to put their faith in the Head Chef'

ELIZABETH CARTER, EDITOR OF THE WAITROSE GOOD FOOD GUIDE

'On Tuesdays we have a "nothing day", and the kids look forward to it'

ELAINE, 43, IT CONSULTANT AND MOTHER OF THREE, HARROGATE



News bites

JANUARY

1 NEW YEAR'S DAY
While Prosecco still ranks as the fizz of choice to bring in the New Year, outselling Champagne by **1.7 bottles to one**, local is clearly this year's buzz word. Sales of Nyetimber Classic Cuvée sparkling wine - all the way from the South Downs - are up **173%**, while the King's Ginger liqueur (try it with tonic) is up **36%**. Other homegrown spirits proving popular include Scotch malt whisky, up **26%**; blended Scotch, up **21%**; and



NYETIMBER CLASSIC CUVÉE - UP **173%**

gin, up **29%**. Sales of Chase English Vodka, made from Herefordshire potatoes, are up **28%**.

On the table, oysters are up in sales by **78%**! And not forgetting Burns Night: extra helpings of neeps and tatties means sales of swedes get a boost.

BURNS NIGHT BONANZA - SWEDES UP **9%**



FEBRUARY

14 VALENTINE'S DAY
Say it with bubbles. Champagne and fizz make up seven of the 10 bestselling lines in the week leading up to the big day. Source: Waitrose Cellar

23 MARCH FAIRTRADE FORTNIGHT
As the nation relishes the prospect of two weeks of feelgood indulgence, sales of Green & Black's chocolate are up **175%**.



NUMBER CRUNCH

LITTLE WAITROSE SALES ARE UP 25% AS PEOPLE SIMPLIFY THEIR SHOPPING HABITS AND OPT FOR CONVENIENCE

60% OF PEOPLE HAVE NOTED THERE ARE MORE CHOICES AVAILABLE TO THEM THAN THERE WERE FIVE YEARS AGO

BUT

64% SAY THEY ALWAYS OR OCCASIONALLY FEEL OVERWHELMED BY THIS CHOICE

OF THESE:

TWO-THIRDS FEEL THE NEED TO REIMPOSE BOUNDARIES AROUND THE HOME

57% NO GADGETS AT THE TABLE

55% EAT TOGETHER AS A FAMILY ON CERTAIN NIGHTS

HOW DO THEY DO THIS?
30% TURN SCREENS OFF AT A FIXED TIME BEFORE BED

14% ACTIVITY-FREE NIGHT ONCE A WEEK

11% SCREEN-FREE NIGHTS

22.5% OF THE POPULATION HAVE BOUGHT A CHILLED MEAL DEAL THIS YEAR*

MEAL DEALS ALWAYS EXPERIENCE A SPIKE IN SALES FOR TOP TV NIGHTS IN - WE'RE TALKING THE FINALS OF STRICTLY OR THE X FACTOR, OR BIG SPORTS EVENTS



23 FEBRUARY - 8 MARCH 2015
FAIRTRADE FORTNIGHT
FAIRTRADE.ORG.UK/FORTNIGHT

Getty Images

Getty Images

TRENDS

2. Setting our own health boundaries

Eight in 10 of us don't like being told what is healthy and what isn't. Instead, we seek out information and set our own rules when it comes to healthy living

Is butter bad for us or healthy eaten in moderation? Should we stop drinking red wine or does the odd glass help lower our blood pressure? Not a day seems to go by when we aren't given some sort of health advice.

However, a staggering 80% of us say we don't usually trust the advice we receive. Years of claims and counterclaims from specialists have left people tired of being told what to do. Instead, 60% of people set their own boundaries when it comes to healthy eating and drinking. Rather than slavishly following what we're told, we self-regulate and cross-check facts with friends or trusted sources. The result? We might cut back on our sugar intake or stop drinking on weeknights. Nowadays, we are our own health experts.

This growing distrust of conventional sources of health advice has led many to take back control. According to Clare Gough, Waitrose Head of Customer Insight, 'People have much more trust in information they find out for themselves and from peer groups.'

Our attitudes to healthy cooking have also changed. Rather than removing all indulgent ingredients from food, or feel we're missing out, we're more likely to add healthy ingredients such as the brightest, most nutrient-dense vegetables. At Waitrose Cookery Schools, customers are always asking about health and ingredients when it comes to baking, prompting our chefs to launch new Healthy Baking and Gluten Free courses this year. The chefs worked with Waitrose nutritionists to give baking courses a makeover. 'People still want to enjoy baking, but with a healthy twist,' says Waitrose Nutrition Manager Moira Howie.

This new approach is particularly popular with young people, who see healthy eating as common sense. We live in an era of health and abundance, so why take the unhealthy route? People are starting to eat in a simpler way - the attitude is 'less is more'. Waitrose executive chef Jonathan Moore cites bone broth as a prime example of this. 'It's everywhere at the moment,' he says, 'which to me is a really good example of people being on a health kick but still wanting to eat something that's rich and unctuous.'

WHAT THEY'RE SAYING

'The request "One dessert, two spoons" is now commonplace in restaurants'

ELIZABETH CARTER, EDITOR OF THE WAITROSE GOOD FOOD GUIDE

'We know people don't want to be told what to do, so instead we say, "Here's the outer boundary and you can do what you want in the middle". We see it as a pick-and-mix approach that has proved popular with customers'

MOIRA HOWIE, WAITROSE NUTRITION MANAGER

'I love butter. But, no, we were always told to use margarine. And, now, from what I've read, that's nonsense'

NORMAN, 66, WORKS IN TRAINING, FATHER OF ONE, BRACKNELL

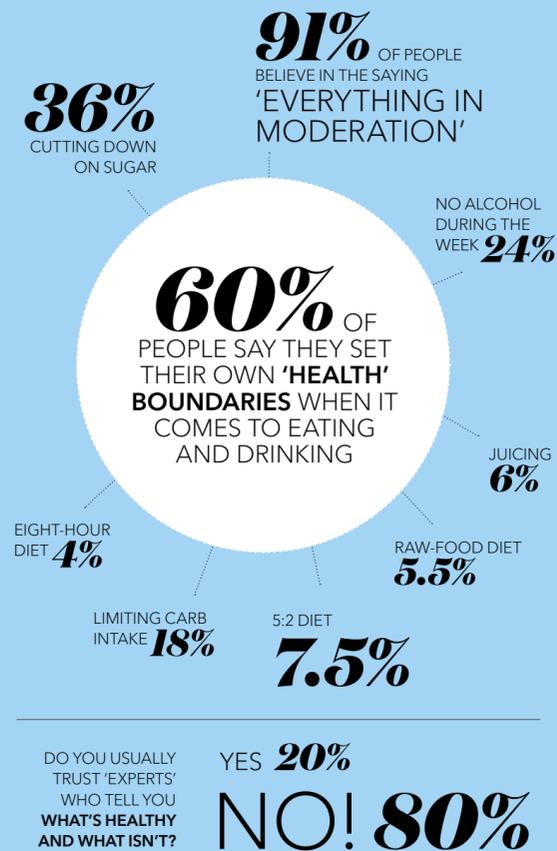
'When looking at annual sales patterns, we're noting a significant move towards dry January for many people - more so than in previous years'

JOHN VINE, WAITROSE SPIRITS BUYER

'Today, it's about pulling information together from different sites and trusted peers. People hear what they're told but they sense-check it with multiple sources and their peer group'

CLARE GOUGH, WAITROSE HEAD OF CUSTOMER INSIGHT

NUMBER CRUNCH



WHAT'S THE STORY WITH SUGAR?

The changing habits of shoppers show that people still crave something sweet, but they're making clever choices to reduce their overall sugar intake

More than a third of people who have set themselves targets to become healthier this year have done so by cutting down on sugar. 'It's almost as if sugar is the new fat,' says Jonathan Moore, Waitrose Executive Chef. 'It's the ingredient that people are really starting to focus on.'

Sales of white granulated sugar are decreasing. 'Instead, we're seeing customers experiment with naturally sweet ingredients, such as date nectar and maple syrup - which they need less of, because of the added flavour,' says Tim Shaw, Waitrose Sugar and Home Baking Buyer. Others are cutting out sugar altogether, inspired by books such as Davina McCall's bestselling *5 Weeks to Sugar-Free*.

People are also looking for help from retailers to cut their sugar intake, so Waitrose has been working to remove it where we can. For example, the sugar we've removed from our yogurts means there have been 62 million fewer calories consumed from across the range this year, while we've cut the amount of sugar in our muffins by 20%.

But less sugar doesn't mean a compromise on flavour. When we reduced the sugar in the jam in our pastry range, the clean strawberry and raspberry flavours really shone.

Overall, customers are sensible when it comes to sugar. Increasingly, they want a taste of something sweet without over-indulging. For example, sales of mini ice creams have grown by 21% this year.

In response to demand for convenient healthy options, we're introducing packs of chopped frozen fruit and vegetables, including favourites such as kale and beetroot, for people to make smoothies and juices at home - with no added sugar.

'Sugar will continue to be a headline for some time,' says Moira Howie, Waitrose Nutrition Manager. The great British sugar intake reduction, it seems, has only just begun.



A WORLD OF INFORMATION AT YOUR FINGERTIPS

Websites, bloggers and social media are playing an enormous role in informing people about healthy eating choices



AVOCADO IS THE MOST PINNED FOOD ON PINTEREST IN THE UK, WHILE ROASTED TOMATO AND AVOCADO TOAST IS THE FOURTH MOST WATCHED RECIPE ON THE WAITROSE TV CHANNEL ON YOUTUBE



AS THE WELLNESS SENSATION GOES MAINSTREAM, WAITROSE VIRGIN COLD PRESSED COCONUT OIL HITS THE SHELVES



CAULIFLOWER CRUST PIZZA

IS THE THIRD MOST WATCHED RECIPE ON THE WAITROSE YOUTUBE CHANNEL THIS YEAR, WHILE DISHES SUCH AS CAULIFLOWER COUSCOUS OR CAULIFLOWER RISOTTO HAVE STARTED TO MAKE THEIR WAY ON TO TOP RESTAURANT MENUS

CAO BARS UP **37%**

(HEALTHY EATING GURUS USE THEM FOR A CHOCOLATE HIT IN CAKES AND DESSERTS)



MEDJOL DATES UP **16%**

(CHAMPIONED BY CLEAN-EATING WRITER AND BLOGGER ELLA WOODWARD)



'GLUTEN-FREE' AND 'DAIRY-FREE' ARE AMONG THE MOST POPULAR TOPICS ON OUR SOCIAL MEDIA PLATFORMS. AND SALES OF THESE RANGES ARE UP **20%** THIS YEAR



AS THE GROWTH OF FREE-FOODS SURGES, THE WAITROSE GOOD FOOD GUIDE STARTS TO SEE CHEFS BECOME LESS FAZED BY REQUESTS FOR GLUTEN-FREE OR DAIRY-FREE DISHES IN RESTAURANTS



SPARKLING WINE UP **57%**

MARCH

15 MOTHERING SUNDAY

What a lot of thoroughly spoilt mums. Luxury smellies are up **56%**, frozen croissants and pains au chocolat go up **16%**, while sparkling wine sees a fizzy spike.

APRIL

5 EASTER SUNDAY

We won't tell if you don't, but not all of those Easter eggs end up at the intended destination. In fact, one-third of us sneakily eat one we've bought for someone else (perhaps they received a card instead of an egg - sales are up **10%**), while another third buy ourselves an Easter egg. It's called 'self-gifting'...



GLUTEN-FREE: HOT-CROSS BUNS UP **124%**

EASTER EGGS UP **890%**

SIMNEL CAKE UP **130%**

MAY

19 - 23 RHS CHELSEA FLOWER SHOW

It's all about the great British outdoors. Lupins are big at Chelsea and sales triple at Waitrose, while grow-your-own fruit and veg are up more than **100%**. Top sellers include sweetcorn, cherry tomatoes and cucumber plants.



23 - 31 ENGLISH WINE WEEK

We don't half make a decent drop these days. Waitrose now has more than 100 different English wines and **60%** market share, while sales are up **177%**.



JUNE

21 FATHER'S DAY

This year, dads are mostly drinking port: sales are up **81%**, while traditional spirits get a **21%** boost.

24 - 28 GLASTONBURY

Forty-five years down the track, the love affair with this grande dame of British music festivals continues. Little Waitrose shops at Welcome Break service stations in the area see sales up **12%**.



FAMILY FAVOURITES

We clearly love to tuck into Sunday roasts and comfort foods, whatever the season: Yorkshire puddings up **17%** and pies up **12%**.

29 WIMBLEDON FORTNIGHT

And that can only mean one thing: British strawberries are up **11%**, cream is up **9%** and Pimm's rockets **25%**. This year, Wimbledon announces it will be serving English fizz for the first time, prompting a **107%** sales surge in English wine.



AT THE MEREST HINT OF WARMER WEATHER, SALES OF SUMMER FAVOURITES START TO SIZZLE

COOL BAGS UP **106%**

BARBECUE MEATS, KEBABS AND BURGERS UP **82%**

HALLOUMI UP **56%**

JULY

LIFE'S A PICNIC

Picnic season is well and truly upon us and mini bottles of wine are up **82%**. And it's a lovely time of year for afternoon tea. Sales of cucumber (for the most classic of summer sandwiches) rise by **30%**, Victoria sponge by **40%** and rosé wine by **43%**.



Dunk your way around the UK

Could your biscuit of choice be related to your postcode? We've done the calculations and it seems the answer is yes! Why not take a tour using our biscuit map and make up your own mind...



THE BIG DIP

Our recent survey on the nation's dunking habits produced some surprising results. The slowest dunkers, it seems, are those in the North East, where 65% wait for the biscuit to go soft before tucking in. In the South West, however, half of us choose to take it slow and half opt for a quick dip. But no matter how you dunk, there's a great selection of biscuits out there to choose from.

Dodge this
Jammie Dodgers are the bestselling children's biscuits at Waitrose.

Keen on shortbread?
Walkers Pure Butter Shortbread is our fastest-growing biscuit. Could this be the start of a shortbread revival? You heard it here first.

Nuts about essential ginger
Our bestselling essential Waitrose biscuit is essential Waitrose Ginger Nuts. We sold enough last year for everyone in Scotland to tuck into at least two with a cuppa.

Breakfast on the go
Our most popular breakfast biscuit is BelVita, providing almost 1.5 million breakfasts on-the-go to Waitrose shoppers over the past year.

Digest this
McVitie's Milk Chocolate Digestives are the number one biscuit of choice for Waitrose shoppers.

Easter treats
Our bestselling biscuit over Easter was Bahlsen's Choco Leibniz.

Based on data from Waitrose sales, the latest Waitrose survey data and Nielsen Scantrack data for United Biscuits

TRENDS

3. Moveable feasts

Physical boundaries are changing within the home - a new informality around mealtimes means that traditional 'eating spaces' are being replaced by new ones

Where do you eat your meals? Our less-structured lifestyles mean traditional rules governing where and when we eat no longer apply. Formal dinners around the dining room table belong to a bygone era. A quarter of people tell us they eat outside more than they used to. This rises to one in three among 18- to 24-year-olds. Meanwhile, 15% of those with a dining room say they use it less than they did five years ago.

The new watchwords when it comes to eating in the evening are flexibility and informality, says Jonathan Moore, Waitrose Executive Chef. 'There is definitely a move towards people grazing and eating lighter meals, as well as people eating outdoors. It's flexible, it's social and, of course, there's also loads of sharing,' he says.

Fragmented lifestyles mean that family members are no longer bound together by one mealtime. Different meals can be consumed in the same household on the same evening. 'Four people can have four different cuisines at four different times of the evening under the same roof. Dinner has to fit around people's lifestyles,' Jonathan adds.

This new informality is reflected in how people cook. A third say their cooking is less formal when they entertain friends or family. One in five 18- to 24-year-olds ask friends to 'muck in' and bring dishes when they come round for dinner. But the declining popularity of the dining room doesn't mean we've become a nation of couch potatoes. About 30% of us say the invention of televisions that you can pause and the rise of 'anytime' streaming or catch-up services, such as Netflix and BBC iPlayer, have led to fewer TV dinners in our homes.

WHAT THEY'RE SAYING

'We're seeing a big increase in outside dining space at restaurants - some pubs are even converting their car parks to cater for the added demand'

ELIZABETH CARTER, EDITOR OF THE WAITROSE GOOD FOOD GUIDE

'We don't use the dining room. It has a beautiful table in it, which probably hasn't been used for five years'

ELIZABETH, 55, FASHION MANAGER AND MOTHER OF THREE, CHERTSEY

'Our dining room is now the office. We eat in the kitchen'

CHRISTOPHER, 72, ARCHITECT AND FATHER OF THREE, SUNNINGDALE

'We've seen an increase in "grazing" foods. It wouldn't be unusual these days to have six, seven or eight dishes on the table and people select what they want, whether it's Greek meze or Spanish tapas. It's the style in which people tend to eat now - little and often'

JONATHAN MOORE, WAITROSE EXECUTIVE CHEF



DEMAND FOR GRAZING OPTIONS IS SOARING IN WAITROSE STORES WITH IN-STORE WINE BARS, JUICE BARS AND BAKERIES. SALES OF FOOD IN THIS STYLE ARE UP **23%** THIS YEAR

27% OF HOUSEHOLDS EAT OUTDOORS MORE THAN THEY DID FIVE YEARS AGO

82 WAITROSE SHOPS HAVE INSTALLED OUTSIDE DINING AREAS IN RESPONSE TO DEMAND FROM CUSTOMERS TO EAT OUTDOORS

NUMBER CRUNCH

ONE IN SEVEN FAMILIES USE THEIR DINING ROOM LESS THAN THEY USED TO

30% OF PEOPLE SAY THE MEALS THEY COOK FOR FAMILY AND FRIENDS ARE LESS FORMAL THAN THEY USED TO BE

DINING ROOM USAGE HAS FALLEN THE MOST IN LONDON, THE EAST MIDLANDS AND NORTHERN IRELAND

30% OF PEOPLE SAY THAT PAUSABLE TVS, NETFLIX AND BBC IPLAYER HAVE LED TO A REDUCTION IN TV DINNERS

AUGUST

Festival-shoppers buy prepared cans of spirits and mixers - pushing sales up by **29%**. Favourites include gin and tonic and Jack Daniel's and cola. Typical British weather plays a part in a hike in sales of three festival essentials: sun lotion sales go up by **28%**, while the number of rain ponchos and umbrellas sold is double that of last year.



THE RETURN OF THE ASHES SEES CRICKET FANS STOCK UP ON BOTTLED ALES - UP **35%**

AND INGREDIENTS FOR CRICKET TEAS, INCLUDING TEA AND COFFEE - UP **40%**

ALL-BUTTER SCONES INCREASE BY **21%**

WHILE CAKE SALES RISE BY **25%**



GLUTEN FREE

SEPTEMBER

Hot on the trail of the Great British Bake Off's gluten-free technical challenge, our free from... range of products enjoys an **18%** sales increase, while demand for our range of baking parchments, bags and wraps climbed by **10%**.

After a summer of treats, healthy snacks for lunchboxes are in demand. Soft fruit sales jump by **12%** and snack salads by **28%**. And the back-to-school rush sees parents everywhere reach for the laundry liquid.



SCHOOL'S BACK, AND LAUNDRY LIQUID SALES RISE BY **62%**

TRENDS

4. Kitchen clashes

We all love to cook. But straying into other people's territory in the kitchen can lead to tension, which is when new tactics come into play

The idea that mum cooks for the entire household became outdated decades ago. But with the rise of multi-generational households, kitchens are getting very crowded. We all like to show off our culinary skills, but this can lead to clashes. Fighting over space can be a recipe for disaster.

The shape of British households is changing. Due to soaring property prices, many grown-up children, the so-called 'boomerang generation', have moved back in with their parents. The number of cohabiting couples with dependent children grew by 29.7% between 2004 and 2014, according to official figures.

Almost one in three people say that a housemate's messiness is the main reason for tension in the kitchen, while one in six say intrusion into their personal space is the main cause of kitchen clashes. In the meantime, bossiness is the third most common source of friction.

Overcrowding in the kitchen has led to people creating boundaries to protect themselves. In the focus groups we conducted this summer, some said they resort to hiding treats where no one can find them. One mum fixed a lock on the door of her utility room so she could have some peace and quiet. Other households opt for tag-team cooking. 'We take turns in the kitchen. I can't do it when he's there,' said Georgina, a retired grandmother from Staines, about her partner.

The younger the housemates, the more tension ensues. However, retirees' kitchens are hardly free from conflict. According to our survey, almost a quarter of those with recently retired partners say their other halves do more cooking than they used to. And in 40% of these cases, this has led to greater tension.

WHY THEY'RE ARGUING IN THE KITCHEN
(AMONG ALL AGE GROUPS)

14%
ONE OF YOU IS BOSSIER THAN THE OTHER(S)

27%
ONE PERSON IS MESSIER THAN THE OTHER(S)

BECAUSE...

4%
ONE OF YOU IS TOO EXPERIMENTAL

13%
ONE PERSON IS SLOWER THAN THE OTHER(S)

6%
ONE OF YOU CAN'T COOK

17%
ONE PERSON HOGS SPACE

WOMEN ARE MORE LIKELY THAN MEN TO COMPLAIN THAT THEIR PARTNER TAKES UP TOO MUCH SPACE WHEN COOKING

YOUNG PEOPLE ARE ALMOST THREE TIMES AS LIKELY TO ACCUSE A HOUSEMATE OR PARTNER OF BOSSINESS IN THE KITCHEN THAN SOMEONE OVER 45

WHAT THEY'RE SAYING

'My husband is a brilliant cook, but he likes pots. I cook in one pot - he'll have six'

ELIZABETH, 55, FASHION MANAGER AND MOTHER OF THREE, CHERTSEY

'I don't want them coming in - it's my space'

TINA, 55, SENIOR ACADEMIC AND MOTHER OF TWO, LEEDS

'I have a secret cereal packet. It's the one the kids don't like and I hide the chocolate biscuits in there'

CHLOE, 41, LOSS ADJUSTOR AND MOTHER OF TWO, LEEDS

'I don't mind her coming in, but she will dither. You can't dither when you're cooking'

NORMAN, 66, WORKS IN TRAINING, FATHER OF ONE, BRACKNELL

'He [my retired husband] is there all the time, driving me mad'

MARIE, 67, SEMI-RETIRED AND MOTHER OF TWO, EGHAM

Waitrose Cookery School

'We see a lot of recently retired men on courses in our Cookery Schools. They're one of our fastest-growing student groups, so we've started trialling courses aimed specifically at them'

CLAIRE LANZA, HEAD CHEF, WAITROSE COOKERY SCHOOL, SALISBURY

TRENDS

5. Every day's a holiday

The rise of convenience and online shopping has given people the freedom to choose how they shop. Today, we shop like we're on holiday - little and often

Changing shopping habits means we're no longer bound by the constraints of the weekly shop. We're becoming far more relaxed about when we buy our food. Half of us now say our shopping habits are similar to when on holiday: we shop little and often, we shop locally and we focus on buying fresh food for that evening.

We're planning ahead less, too. With the rise in convenience stores - 1,000 new small supermarkets have opened in the UK in the past year alone - we buy food as and when we need it. Waitrose convenience sales have increased by 25% so far this year. The 'top-up shop' is now worth £16.1 billion each year, with growth being driven by planned top-up shops.

'It used to be that "topping up" in a convenience store was unplanned and not particularly desired,' says Waitrose Head of Operations and Trading, Convenience, Jon Arnold. 'But now shoppers deliberately work it into their weekly routine. They buy bulky food online, or all in one go, and then nip out in the week to buy dinner for that night. Alternatively, they're inspired to cook a particular meal and then shop just for the ingredients they need.'

Three in 10 people tell us they shop in a supermarket between three and four times a week, up from a quarter of customers five years ago. Nearly one in 10 of us shop at a supermarket between five and six times a week. The 'open all hours' culture - combined with the ease of online shopping - negates the need to stock up. Customers tell us that the fear of running out of food is declining.

Clare Gough, Waitrose Head of Customer Insight, says many people now shop daily. She has seen a seismic change in shopping habits: 'It used to be that people would do one big shop, but it is now spread across many more smaller shops. If you look to the younger generation, that's their norm.'

We may shop more frequently, but budget is still of the essence: 50% of shoppers write a list and stick to it, 25% say that buying online helps them keep track of money and one in eight monitor spending with handheld scanners.

WHAT THEY'RE SAYING

'That traditional "go out and do a megashop" has been replaced by people's ability to do what they want, when they want'

CLARE GOUGH, WAITROSE HEAD OF CUSTOMER INSIGHT

'I hate all the unpacking that comes with a big shop. The little supermarkets stock everything you need'

ELAINE, 43, IT CONSULTANT AND MOTHER OF THREE, HARROGATE

'There are so many shops you can go to. When I was younger there wasn't as much choice and you would go and do one big shop'

CHLOE, 41, LOSS ADJUSTOR AND MOTHER OF TWO, LEEDS

'Our stores offer a much greater variety of pack sizes now - people want the option to buy what suits them. In general, people don't want to hoard food'

JONATHAN MOORE, WAITROSE EXECUTIVE CHEF

'People don't want to be tied down to structure - this meal on Monday and this meal on Tuesday. They want to think, "I've been inspired by something and I'll nip out to the shops and buy it now"'

MOIRA HOWIE, WAITROSE NUTRITION MANAGER

ARE YOUR NORMAL SHOPPING HABITS SIMILAR TO THOSE YOU ADOPT WHEN ON HOLIDAY?

YES **48%**



40%
OF WAITROSE SALES IN LONDON ARE AFTER 5PM



ONLINE SHOPPERS ARE TWICE AS LIKELY TO STOCK UP ON CLEANING, HOUSEHOLD AND STORECUPBOARD ITEMS

WHEREAS IN-STORE CUSTOMERS HAVE MORE FRESH FOOD IN THEIR BASKETS

A THIRD OF 18- TO 24-YEAR-OLDS VISIT A SUPERMARKET THREE TO FOUR TIMES A WEEK, COMPARED TO A QUARTER OF PEOPLE OVER 55

HOW MANY TIMES A WEEK DO YOU SHOP AT A SUPERMARKET?

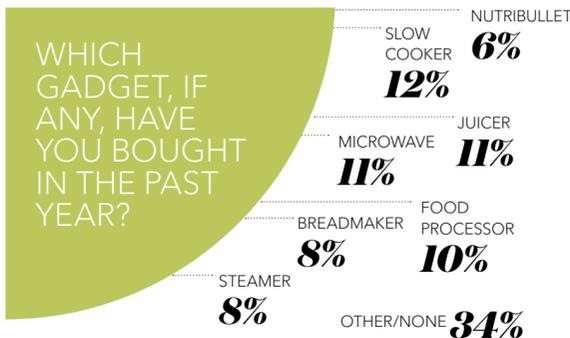


50% OF US USE SHOPPING LISTS TO HELP KEEP THE FOOD BILL DOWN

WHILE **25%** SAY THAT SHOPPING ONLINE HELPS THEM KEEP TRACK OF MONEY

Pick of the kitchen cabinet

It may forever be associated with the 1980s, but the microwave still reigns supreme in the kitchen - 50% of people surveyed use it more than any other gadget. When it comes to new purchases, however, slow cookers and juicers are gaining in popularity...



COURGETTE SALES RISE BY 10% AS 'COURGETTI' BECOMES THE NATION'S ANSWER TO STARCHY CARBS



MOST POPULAR GADGETS BY AGE

18- TO 24-YEAR OLDS: JUICER (18% HAVE BOUGHT ONE IN THE PAST YEAR)

35 YEARS AND OVER: SLOW COOKERS WERE THE MOST POPULAR IN ALL 35+ CATEGORIES (35-44, 45-54 AND 55+)



24- TO 34-YEAR-OLDS: MAGIMIX/FOOD PROCESSOR, OR JUICER (EACH BOUGHT BY 14% OF PEOPLE IN THE PAST YEAR)

18- TO 24-YEAR-OLDS ARE TWICE AS LIKELY AS OVER-55s TO HAVE BOUGHT A BREADMAKER IN THE PAST YEAR

PARENTS ARE TWICE AS LIKELY TO CHOOSE THEIR SLOW COOKER AS THEIR FAVOURITE KITCHEN GADGET



'I have a Nutribullet - it's fantastic. I've started buying frozen berries. Whizz them up and you have a healthy drink'

MARIE, 67, SEMI-RETIRED, MOTHER OF TWO, EGHAM

WAITROSE NOW SELLS MORE FROZEN CHOPPED FRUIT THAN FROZEN PIZZA



TRENDS

6. What's your food age?

Traditional barriers are breaking down. Today, someone in their 60s is more likely to experiment in the kitchen than someone in their 20s. Just don't mention junk food

Think older people are unadventurous and set in their ways when it comes to food? Think again. The assumed barriers between different age groups are breaking down. Having grown up in the post-war years, people over 55 are keen to cut loose and experiment with their cooking.

Our survey found over-55s are more than twice as likely to be inventive in the kitchen as they are to follow a recipe. Meanwhile 18- to 24-year-olds, who are perhaps still finding their feet, are less inclined to improvise than use a recipe.

For the older generation, food is exciting where it was once functional. 'Old is the new young,' says Clare Gough, Waitrose Head of Customer Insight. Given that they grew up in an era of food austerity, it is perhaps unsurprising that two-thirds of over-55s claim to be more adventurous in the kitchen than their parents were. However, this figure falls to just 36% among 18- to 24-year-olds.

But there seems to be one area into which over-55s won't stray: junk food - 84% of over-55s claim they eat healthily, compared to 67% of 18- to 24-year-olds. Indeed, when they set themselves health boundaries, over-55s are almost twice as likely to use a juicer as 18- to 24-year-olds. They're also more likely to try a trendy 'raw food' diet than teenagers.

Retired people in our focus groups told us they love experimenting. Having grown up in an era that lacked abundance, it seems older people are making up for lost time.

WHAT THEY'RE SAYING

'I eat pesto with virtually everything. I didn't even know it existed a few years ago. I was a meat-and-two-veg man. But my daughter is a vegetarian, so I'm eating a lot of vegetables now that I wouldn't have back then'

PETER, 70, RETIRED, FATHER OF TWO, VIRGINIA WATER, SURREY

'I find things online. I have the iPad right by the cooker'

MARIE, 67, SEMI-RETIRED, MOTHER OF TWO, EGHAM

'Most people are old-school and have a library of books. However, they Google a lot more than they used to'

JONATHAN MOORE, WAITROSE EXECUTIVE CHEF

NUMBER CRUNCH

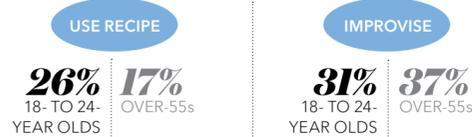
ALMOST A THIRD OF OVER-55S EAT HEALTHILY BECAUSE 'IT TASTES BETTER', COMPARED TO ONE IN SIX 18- TO 24-YEAR-OLDS, WHO PREFER TO SAY THAT HEALTHY EATING 'MAKES THEM FEEL GOOD'

DO YOU GOOGLE RECIPES MORE NOW THAN YOU DID FIVE YEARS AGO? YES **58%**



DESPITE OUR KITCHENS BEING FULL OF COOKBOOKS, **33%** OF US ADMIT TO NEVER USING THEM

WHEN YOU COOK, ARE YOU MORE LIKELY TO USE A RECIPE OR IMPROVISE?



OUR BESTSELLING COOKBOOK OF THE YEAR IS...

DELICIOUSLY ELLA

The clean-eating blogger Ella Woodward proves a hit with young and old alike



... AND THE TOP RECIPE SEARCHES IN 2015 ON WAITROSE.COM

- ROAST PORK WITH PERFECT CRACKLING AND APPLE SAUCE
- THE PERFECT PIMM'S
- VICTORIA SPONGE WITH RASPBERRY JAM AND BUTTERCREAM
- HESTON'S RICH CHILLI CON CARNE WITH SPICED BUTTER
- HONEY-GLAZED ROAST CARROTS AND PARSNIPS
- SPEEDY JACKET POTATOES WITH CRISPY BACON AND SALMON

Best of British

This year's mild winter and early spring gave us a bumper crop of many seasonal favourites. We look back on 2015's growing highlights...



FEBRUARY Golden daffodils burst into bloom. Spring has arrived ahead of schedule and we can all look forward to the sunny months ahead.

MARCH The British strawberry season gets off to an early start, thanks to the milder temperatures and spring sunshine. These perfect growing conditions mean Waitrose is also able to sell British raspberries in March for the first time ever.

APRIL Plump and juicy English tomatoes are the next to make a welcome early arrival, adding taste and texture to a wealth of spring and summer recipes.

JUNE Because all that lovely spring sunshine produced plenty of picture-perfect cherry blossom, there are now 20% more ripe-for-the-picking cherries on the trees than you'd normally find at this time of year.

JULY As the British plum season gets underway, we're treated to a sweeter-than-ever crop - perfect for picnics, pies and crumbles. There's also a plentiful harvest of home-grown sweetcorn cobs, just in time for the barbecue season.

AUGUST It's not just plums that are significantly sweeter than usual. Near-perfect growing conditions have also led to a huge harvest of home-grown apricots that are soft, juicy and sweet.

OCTOBER It's not all about the sunny weather. Unexpected rain and hailstorms in the late summer resulted in an excess of weather-blemished pears from British farms. It's only the skin that's been scarred, though. The fruit is still as delicious as ever. Ugly-on-the-outside produce like this is still sold in Waitrose to support UK farmers and prevent food waste.

Shopping all over the world

Waitrose exports products to retailers in more than 50 countries. From our Thick Seville Orange Marmalade to Cream of Tomato Soup and Liquorice Allsorts, check out some of our most popular must-haves overseas

SARK
essential Waitrose Chopped Tomatoes

BELGIUM
Waitrose Baking Powder

MALTA
essential Waitrose Plain Flour and Waitrose Wine Gums

CYPRUS
essential Waitrose Sugar Free Indian Tonic Water

GREECE
Waitrose Crunchy & Tangy Blueberry & Cranberry Granola

SWITZERLAND
essential Waitrose English Mustard and Waitrose Lemon Curd

PORTUGAL
Waitrose Duchy Organic Smooth Peanut Butter

SPAIN
Waitrose Liquorice Allsorts and Waitrose Wine Gums

GIBRALTAR
essential Waitrose Cheese and Onion Crisps

SOUTH KOREA
essential Waitrose Strawberry Jam

JAPAN
Waitrose Sweet & Nutty Raisin, Almond & Honey Granola, and Waitrose Three-year-old Blended Scotch Whisky

BERMUDA
essential Waitrose Organic Chopped Tomatoes in Juice and essential Waitrose Cream of Tomato Soup

CARIBBEAN
Waitrose Sweet & Nutty Raisin, Almond & Honey Granola, and Waitrose Fine Crystal Sea Salt

GHANA
essential Waitrose Petit Pois

CHILE
Waitrose Colombian Freeze Dried Coffee (we sell more of this in Chile than in our UK shops!)

FALKLANDS
essential Waitrose Long Life Semi-Skimmed Milk

SOUTH AFRICA
Waitrose Green Basil Pesto

KUWAIT
essential Waitrose No Added Sugar Apple & Blackcurrant Squash

UAE
Waitrose Pet Food, Waitrose Fine Crystal Sea Salt and Waitrose Organic Unsweetened Soya Milk

NEW ZEALAND
essential Waitrose Thick Seville Orange Marmalade and Waitrose Crunchy & Tangy Blueberry & Cranberry Granola

BRUNEI
essential Waitrose Cola

SINGAPORE
Waitrose Organic Plum Tomatoes

Our favourite drinks

Prosecco may be this year's runaway hit, but we've also become more experimental in our choices and more health aware, says Pierpaolo Petrassi MW, Head of Buying, Beers, Wines and Spirits



Provenance and discovery have been key drink trends this year. Sales of craft beers have grown by a third as we appreciate the stories behind our myriad niche brands. In spirits, gin continues to fascinate: every distillery has a unique heritage and no two gins taste the same.

People have discovered new wines and fallen back in love with old ones. English wine is seeing huge growth while crisp rosés flew off the shelves this summer. We have also seen the rise of Rhône reds, such as Côte-du-Rhône Villages.

While Champagne sales are still on the up, Prosecco continues its seemingly unstoppable march. In fact, it's fast becoming the drink of choice: Waitrose Cellar has seen an increase in purchases for weddings over the traditional choice of fizz. Champagne.

People are experimenting more, as seen by our spirits team. Whether they're buying vermouth to turn a gin into a

Martini, or buying Aperol to turn Prosecco into an Aperol Spritz, they're keen to try new combinations.

Health remains important. This year we've seen customers adopt what I call the 'credit-debit' system: when it comes to drinking, they'll balance every treat with something healthy. For example, if they have a couple of glasses of wine, they might have a salad for lunch the next day, with a soft drink. Drinking is becoming more about quality, not volume.

It's appropriate that this report is about boundaries falling, because they're tumbling when it comes to drinking habits. Take spirits. A third of women now enjoy whisky, up from a quarter just two years ago.* Old ways of doing things are being subverted. Think that dark rum is for mixing into a long drink? Think again – we predict that dark rum is about to take a place at the high table of spirits that you can sip.

GIN SALES ARE UP BY 300% ON WAITROSECELLAR.COM AND **GIN COURSES AT THE WAITROSE COOKERY SCHOOL ALWAYS SELL OUT**

25% OF WAITROSECELLAR GIN SALES ARE TO LONDONERS

'**PERFECT PIMM'S**' IS THE **#2** RECIPE ON WAITROSE.COM

THIS YEAR **MORE DINERS ARE ORDERING WINE BY THE GLASS** - EITHER TO CUT DOWN THE AMOUNT THEY DRINK, OR TO TRY MORE THAN ONE VARIETY DURING A MEAL

1 in 4 PEOPLE HAVE SET THEMSELVES A TARGET OF

DRINKING NO ALCOHOL ON WEEKDAYS WITHIN THE PAST YEAR



Size matters

SALES OF SMALL BOTTLES OF WINE ARE UP BY **26%**

MORE MAGNUMS ARE BEING ORDERED IN RESTAURANTS THIS YEAR†

†THE WAITROSE GOOD FOOD GUIDE



This year we've seen soaring demand for single-serve bottles, as customers look for something they can drink on the move, while picnicking or celebrating in a modest fashion. That's why when it comes to drinks such as Prosecco we've launched an array of bottle sizes to suit all occasions.

WAITROSE SELLS PROSECCO BY THE MAGNUM FOR THE FIRST TIME EVER

While beautiful things do come in small packages, a magnum of Prosecco makes a perfect centrepiece or gift for a host. 'It's a really impressive bottle to take to a party – and our customers have jumped at the chance to buy something that's a bit special,' says Cat Lomax, our Sparkling Wine Buyer.

As our lifestyles and shopping habits become more informal, we're likely to see even more migration away from traditional 75cl wine bottle in the future.

for the facts
drinkaware.co.uk

Predictions for 2016

Goldenberries

This relatively unknown nutrient-packed fruit (in fact, they're dried physalis) will only gain in popularity. Great in baking.

Persian cooking

Already trending this year, but set to go mainstream in 2016. Think

spiced stews, succulent lamb dishes and lush salads. Persian cooking courses at Waitrose Cookery Schools regularly sell out.

Sewing the seed

Sprouting seeds is a great way to add nutrient-rich crunch to a salad. Waitrose

will be selling a seed sprouter kit for budding fans.

Brazilian barbecue

We'll be in party mode in 2016 with the Rio Olympics and The Queen's 90th birthday. Brazilian barbecue is a new trend – grill large (picanha)



joints while enjoying the classic Brazilian cocktail, caipirinha.

Con-fusion food

Take a traditional dish and alter it in an unusual way – but with great results. Street food vendors lead the way here.

Homey smoke!

Home-smoking kits will be, well, red hot

next year. We'll be smoking everything from cocktails and vegetables to butter and eggs – and that's just for starters.

FOR MORE INFORMATION ON KEY TRENDS FOR 2016, CONTACT THE WAITROSE PRESS OFFICE ON 01344 825 080.

GOING UP WHAT WAS IN FAVOUR IN 2015

DRINK

DRY, PALE ROSÉ
Sales of Provence-style light and crisp rosé are up 19%

SPECIALITY BEER
The craft beer revolution shows no sign of slowing. Sales up 34% year-on-year

VERMOUTH
With a new Bond film on the way and *Mad Men* still popular, this cocktail staple is seeing sales up 24%

ENGLISH SPARKLING WINE
Now our number three sparkling wine, after Prosecco and Cava

ROSÉ CHAMPAGNE
Fresh and different, and always a treat. Sales up 46%

PROSECCO
The continued rise of this Italian fizz saw fears of a shortage of supply earlier this year. Don't worry, we have plenty

PREMIUM TEQUILA
Sip, don't slam. Sales up 20%

ARGENTINIAN MALBEC
This wine is fast becoming a gluggable favourite

CHAMPAGNE
A perennial favourite. Sales up 14%

ENGLISH STILL WINE
Any lingering snobbery about English wine has disappeared as it's so good. Sales up 95%

KING'S GINGER
This little-known liqueur was invented for King Edward VII, or 'Bertie', in 1903. Sales are growing in double digits

RHÔNE REDS
Sales have overtaken Bordeaux reds for the first time this year

AMARULA
A *Great British Bake Off* contestant laces her crème brûlée with the cream liqueur, and sales soar by 23%