Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the UK Prepared Meals Market

FD0055IS – Sample Pages

Insight Report
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Reasons to buy this report

This report brings together consumer analysis and market data to provide actionable insight into the behavior of consumers. This is based on Canadean's unique consumer data – developed from extensive consumption surveys and consumer group tracking – which quantifies the influence of 20 consumption motivations within your industry.

Consumer trends analysis

An overview of the key demographic groups driving consumption in your industry, and what their motivations are for doing so. This enables the reader to identify the most important trends within the market and also determine whether beliefs over what influences consumer behavior within the category are accurate.

Market sizing

Market value and volumes are given over 2008–2018 for 10 leading countries across the globe. Coverage includes major European markets, the US, and the emerging markets of Brazil, Russia, India, and China.

Demographic analysis

Key demographic groups driving consumption within the US market are identified. The figures showcase the number of Dairy occasions attributed to specific age groups and genders, as well as identifying whether these demographic groups "over" consume in the category.

Product innovation examples

Examples are provided of innovative international and country-specific product development within your industry, with analysis of how these products effectively target the most pertinent consumer need states.

Recommended actions

Strategic recommendations of how to capitalize on the evolving consumer landscape are offered, allowing product and marketing strategies to be better aligned with the leading trends in the market.

Future outlook

The report provides insight to highlight the "so what?" implications behind the data, and analysis of how the need states of consumers within your industry will evolve in the short-to-medium term future.

Busy lives, search for convenience and declining culinary skills are driving Prepared Meals market in the UK

There are a number of reasons why consumers turn to Prepared Meals and a number of reasons they don't. It is crucial for manufacturers to understand what consumers want from the actual products that they purchase

Financial well-being: Prepared Meals are particularly prone to being on promotion, appealing to those on limited budgets.	**Busy lives:** The busy lifestyles of consumers means that they do not always have the time to cook from scratch.	**Convenience:** Consumers either dislike cooking or want to reduce time spent in the kitchen to free up time for other activities.	**Experimentation:** Consumers want to try more exotic foods and Prepared Meals are a simple way of experimenting more.	**Poor culinary skills:** Consumers can still lack knowledge when it comes to cooking from scratch so will turn to processed food.

Freshness: Linked to quality, health and taste, freshness is a priority – something not associated with Prepared Meals.	**Scratch cooking:** For many, cooking is seen as enjoyable and a good skill to have, as such they will free up time to spend preparing a meal.	**Health:** Prepared Meals are inherently associated with having a high content of "bad" ingredients like salt, fat and sugar.	**Expense:** Awareness is growing that fresh food doesn't necessarily carry a premium price and that scratch cooking can be low cost.	**Safety:** The recent horse meat scandal has increased levels of distrust as to what ingredients are used in Prepared Meals.

There were X.X billion Prepared Meals occasions in the UK in 2012, with the highest occasions witnessed amongst Early Young Adults and males

In the **UK**, there were **X.X billion Prepared Meals** occasions in 2012.
This equates to **XX.X Prepared Meals occasions** per person per year

This can be broken down into

GENDER

Women:
Occasions: X.X billion
Per person: XX.X

Men:
Occasions: X.X billion
Per person: XX.X

UK males, on average, have a higher number of Prepared Meals occasions per year compared to females. This means that despite coverage in the media of men becoming more adventurous in the kitchen and seeing cooking as a skill rather than a chore, they are still more dependent on Prepared Meals compared to women.

AGE GROUPS

Kids & Babies
Occasions:
X.X billion
Per person: XX.X

Tweens/Early Teens:
Occasions:
X.X billion
Per person: XX.X

Early Young Adults:
Occasions:
X.X billion
Per person: XX.X

Older Young Adults:
Occasions:
X.X billion
Per person: XX.X

Pre-Mid-Lifers:
Occasions:
X.X billion
Per person: XX.X

Mid-Lifers:
Occasions:
X.X billion
Per person: XX.X

Older Consumers:
Occasions:
X.X billion
Per person: XX.X

On average, consumers aged 45-54 years old enjoy the most Prepared Meals occasions per year in the UK. Whilst not applicable to all, this age group is less likely to have young children in the home and are still leading active social lives and holding senior positions in the workplace, meaning a greater reliance on convenience food.

Consumers seek a range of choices to reflect their taste preferences

Degree of influence the Individuality mega-trend has on demographic groups

Gender

The need for Personal Space & Time is higher among men, at XX.X%, than in women, at XX.X%, which means men are more likely to take recourse in Prepared Meals to relax and enjoy personal moments. Meanwhile, Individualism has a greater influence on women, highlighting how they are looking for products that satisfy their individual dietary requirements.

Age groups

Both Personal Space & Time and Individualism peak among Older Young Adults, at XX.X% and XX.X%, respectively. The influence of the sub-trends shows how this cohort is simultaneously feeling more pressured than ever and also wants products they feel reflect their attitudes and outlooks on life.

How the Individuality mega-trend will evolve

As consumers are trying to fit more activities into the same amount of time and feel time-scarce, the value of personal moments will increase. In order to increase emotive approach in the Prepared Meals category, manufacturers need to position products as a more premium experience, as opposed to convenience and compromise between time and taste. Indulgent offerings and exotic flavors, will resonate with consumers who are looking for food in order to treat themselves and relax after work. However, it is also important to launch familiar dishes, that consumers know since childhood to give them an option to go back to their comfort zone.

Individualism will also become more important to consumers – particularly as society continues to age – with consumers wanting products formulated to meet their specific needs. Consumer profiling in the Prepared Meal market needs to become more fragmented – targeting specific age groups as opposed to launching generic offerings.

Prepared Meals producers need to target different occasions throughout busy consumers' days

The Busy Lives of consumers are leading them to feeling time pressured at all stages of the day, something that is having an impact on all eating occasions. Breakfast occasions are being skipped more frequently because of a lack of time or consumers not feeling hungry, especially because there is a lack of time to prepare more exciting and novel meals. When it comes to breakfast, consumers, despite getting up earlier, are struggling to find the time to cook in the morning and eat a morning meal at home. This is leading to either skipping breakfast and snacking in the morning more frequently or eating more breakfasts on-the-go. A number of consumers look for convenient lunch options; however, Prepared Meals are often too heavy to be consumed at lunch. Ready meal manufacturers can capitalise on this time scarcity to increase overall number of ready meal occasions per person per year, releasing products that target morning and lunch occasions that simultaneously offer convenience, great taste, and variety.

Product: Innocent Noodle Pot
Launched: UK
Manufacturer: Innocent Drinks

The Asian street food collection can be marketed as a healthy, tasty and unusual lunch option. Consumers can choose from Vietnamese curry, Japanese ramen, Thai tom yum, and Malaysian rendang options.

Product: Heinz Big Eat All Day Breakfast
Launched: Australia
Manufacturer: Heinz

The product features sausages, tomatoes, mushrooms, potatoes and bacon and targets breakfast occasions. Described as "protein packed meal", it can be marketed towards busy urban dwellers.

Global innovations on formulation and packaging can be a source of inspiration for the UK manufacturers

Innovative Global launches in the Prepared Meals sector

Product: Vraiment Sport ready meal
Manufacturer: Fleury Michon's
Launched: France, 2013
Trend: Experience Seeking, Fun & Enjoyment
This product is positioned as a "after-sports" meal and is aiming to capitalise on the growing popularity of sport nutrition products. The Macaroni Pasta with Chicken Breast and Chopped Tomatoes is rich in protein, low in salt, and free from artificial ingredients.

Brand: Emily's Kitchen Ready Meals
Manufacturer: Woolsworths
Launched: Australia, 2013
Trend: Better Value for Money, Indulgence, Experience Seeking
Australian supermarket Woolworths has invested significantly in its private label brand Emily's Ready Meals in recent years. This is both in terms of promoting the use of high quality ingredients and new offerings, such as New York style Pepper Steak.

Brand: Barefoot Contessa Sauté Dinners For Two
Manufacturer: Contessa Premium Foods
Launched: US, 2013
Trend : Aspiration, Quality Seeking
Ina Garten, an Emmy award winning host of a cooking show, launched a new line of frozen dinners, in collaboration with Contessa Premium Foods. The range offers nine variants based on Ina's favorite recipes and quality ingredients.

Brand: Oh Yes! Doc's Nutrilicious
Manufacturer: Oh Yes! Doc's Nutrilicious
Launched: US, 2013
Trend: Health
Oh Yes! Doc's Nutrilicious launched a line of pizza that claims to be healthier and more nutritious than conventional one and to have a "great taste". The range comprises Whole Wheat Dairy Cheese, Gluten Free Non-Dairy, Whole Wheat Non-Dairy, Gluten Free Dairy Cheese options.

Summary Methodology

This report is comprised of two data research programs

MARKET DATA

- **Method:** analyst triangulation of consensus numbers based upon comprehensive primary and desk research as part of an international research programme.
- **Coverage:**
  - 50 Countries fully researched
    - Category and segment breakdown
    - 8 channels
    - Value and Volume data
  - Internationally comparable data
  - 100% standardized definitions

CONSUMER DATA

- **Method:** extensive consumption surveys and consumer group tracking with strict age and gender quotas to ensure nationally-representative results.
- **Coverage:**
  - 10 Countries
  - 20 Consumer Trends
  - 26 Consumer Groups
  - Category breakdown
  - Integrated market sizing at the country and category level
  - Interim 2013 Consumer data generated by mapping 2013 Market size data onto 2012 Consumer data consumption values

Details on the methodology for both of these research programs can be found in the Appendix.

Related reports

Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the Brazilian Dairy Food Market

Brazilians select Dairy products based on their ability to meet age-specific needs. This doesn't just apply to children, with older adults increasingly aware of their specific nutritional needs. Although poverty rates have declined rapidly in Brazil, the low income of many consumers means they will seek out the best value for money products.

Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the German Bakery & Cereals Market

Indulgence is the primary driver of the German Bakery & Cereals market, motivating over two-fifths of consumption. The need is high in all categories, but peaks in the consumption of cookies and cakes with consumers perceiving these as the go-to categories for decadent, tasty treating where they desire rich taste experiences and novel texture combinations.

Consumer Trends Analysis: Understanding Consumer Trends and Drivers of Behavior in the UK Savory Snacks Market

As an effect of the recessionary environment in the country, people are eating out less and entertaining more at home, engaging in indulgent snacks as an affordable treat to offer friends and family. Savory Snacks are relatively low cost, even for more premium offerings, making them an attractive way of treating oneself regardless of the occasion.