

Breakfast Eating Habits - UK - July 2016

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"Breakfast is an almost universal occasion. While 55% of people eat it at home every day, almost half (49%) sometimes eat breakfast out of home. That 28% do so once a week or more demonstrates that this is an established habit for a sizeable minority."

- Amy Price, Senior Food and Drink Analyst

This report looks at the following areas:

- Convenience appeals to today's time-pressed breakfast eater
- A desire for variety is changing the breakfast occasion
- Sugar remains an issue

Breakfast is an almost universal meal, with 95% of UK adults eating it. The home is the most popular place to eat breakfast, with 55% eating it at home every day, especially older consumers, who enjoy taking their time to enjoy breakfast.

That almost half of UK adults eat breakfast out of home, 28% doing so once a week or more, demonstrates that this is an established habit for a sizeable minority. Of those eating out of home, 41% do so because they do not have the time to eat breakfast at home, while three in ten eating breakfast on-the-go (OTG).

Barriers remain, however, with the cost of eating breakfast out of home still seen to be the main deterrent to more frequent uptake, with almost seven in ten saying it is too expensive to eat breakfast out of home often.

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DID YOU KNOW?

This report is part of a series of reports, produced to provide you with a more holistic view of this market

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The Market – What You Need to Know

Bread and baked goods lead by sales; breakfast biscuits and cereal/snack bars tipped for fastest growth
 Health remains on the agenda
 A time-poor society creates opportunities for OTG formats
 Bread dominates but meal replacement drinks see the biggest growth in NPD

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Adspend holds steady in 2015, with Kellogg's taking the lead

Sales Performance of Selected Breakfast Items

Definition

Bread and baked goods dominate by sales; breakfast biscuits and cereal/snack bars tipped for fastest growth

Bread leads by sales

Portability drives breakfast biscuits/cereal bars

Figure 6: UK retail value sales of selected breakfast foods, 2010, 2015 (est) and 2020 (fore)

Hot cereals perform strongly

Changing habits affect breakfast foods

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Obesity levels continue to rise

Sugar content is a concern for flavoured cereals

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A time-poor society creates opportunities for OTG formats

Catering to the older demographic

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Bread dominates but meal replacement drinks see the biggest growth in NPD

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Health remains an ongoing focus

Manufacturers step up L/N/R sugar claim in 2015

Opportunities for sweeteners such as stevia

Protein trend continues...

...in cereals

...and in meal replacement drinks

...and in yogurt

Positive nutrition called out in bread...

...and cereals

Bread operators look to thins

Gluten-free claims rebound in first five months of 2016

Operators also look to indulgence

Combining wholegrain with chocolate flavour

Birds eye moves into breakfast treats

Brands extend into new areas

Cereal/porridge brands move into new segments

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Brands look to bakes
 Few on-the-go launches
 New York Bakery positions pretzels for on-the-go
 Single-portion packs of granola
 Wall's launches Breakfast Twists
 Premium claims are niche
 Foodservice provides inspiration on unusual flavours
 Expanding and updating breakfast menus
 New flavours put a twist on breakfast staples

Advertising and Marketing Activity

Adspend holds steady in 2015
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 Kellogg's looks to gifts to appeal to consumers
 Müller supports its range
 Birds Eye brings back Waffly Versatile jingle in 2016
 New York Bakery focuses on authenticity through Taste of New York ad
 Brands look to social media
 Kellogg's launches Great Starts
 Activia's InnerSmile should help to position the brand as more fun
 Actimel focuses on breakfast under #takeontheday
 Belvita looks to Facebook ads to showcase recipe suggestions
 Princes videos focus on breakfast
 Nielsen Media Research coverage

The Consumer – What You Need to Know

Breakfast eating is almost universal
 Cereals and toast are most popular when at home; indulgent options when out of home
 Convenience is most important in breakfast choice
 Time pressures drive out-of-home occasions
 Out-of-home options seen to improve, but still seen to be costly

Breakfast Habits

Breakfast eating is almost universal
 Figure 14: Where people eat breakfast, by location, May 2016
 Around half eat breakfast out of home, especially 25-34s...

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Figure 15: Eating breakfast out of home, by age, May 2016

...and the most affluent

Majority eat breakfast at home every day...

Figure 16: Frequency of eating breakfast, by location, May 2016

...particularly over-55s

Figure 17: Eating breakfast at home every day, by age, May 2016

28% eat breakfast out of home once a week

Where People Eat and Buy Breakfast

Almost half of out-of-home breakfast eaters eat at a restaurant/coffee shop/café

44% eat breakfast at work/school/college

Figure 18: Where breakfast is typically eaten out of home, May 2016

Three in ten eat breakfast on-the-go

Coffee/sandwich shops are the most popular destination to buy breakfast

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Cereals and toast are most popular when at home

Figure 20: Breakfast items typically eaten at home and out of home, May 2016

Porridge appeals particularly to over-55s

Eggs benefit from protein positioning

Indulgent options are popular when out of home

..and also in the home, especially at the weekend

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Convenience is most important in breakfast choice

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Ease of use is important when eating breakfast out of home

Interest in nutritional content provides an incentive for NPD

Associating protein with a 'fuller for longer' claim

Young people rate protein and superfood ingredients, older people fibre

Sugar is a particular concern for women aged 45+

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Reasons to Eat Breakfast Out of Home

Time pressures drive out of home occasions

Figure 24: Reasons for eating breakfast out of home, May 2016

Treat culture pervades

Only 19% eat out of home when they have spare money

22% simply aren't hungry enough

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Attitudes towards Breakfast

Out-of-home options seen to improve, but still seen to be costly

Figure 25: Attitudes towards breakfast, May 2016

Taking the time to enjoy breakfast

Technology could help to speed up the payment process out of home

Healthier breakfasts equate to feeling good...

...and snacking less

Boredom fuels a desire for variety

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