consumer corner

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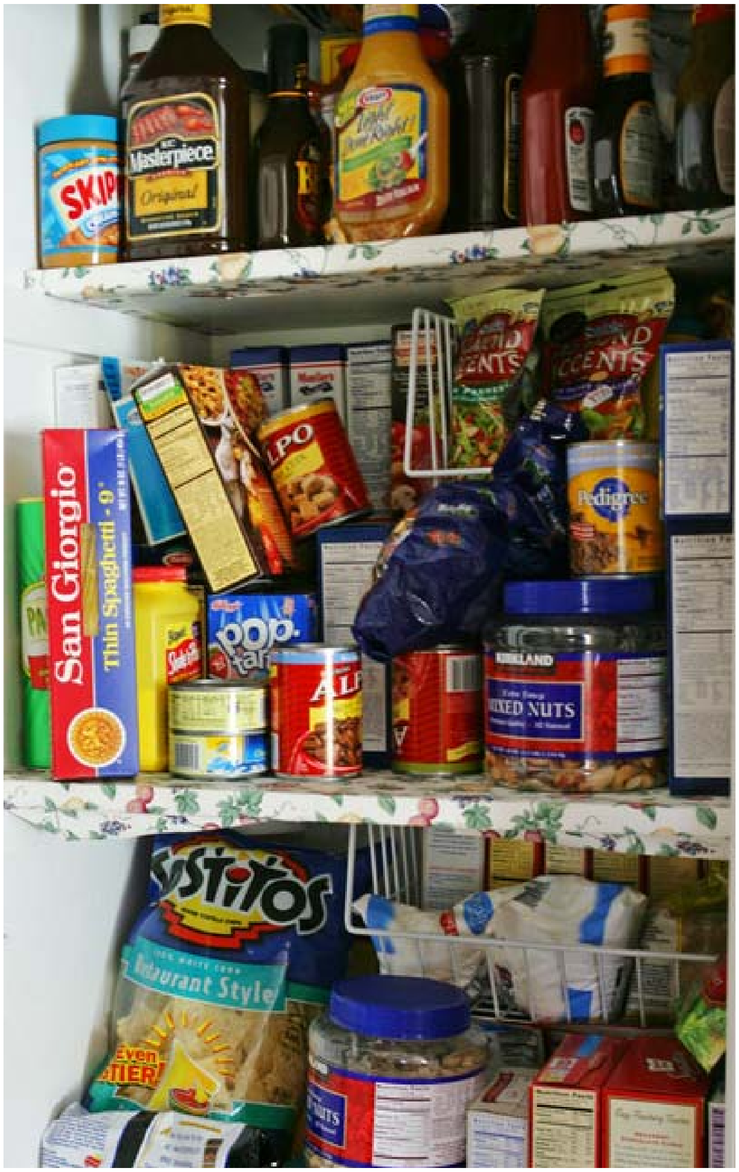

Eating Pattern Recession—Part 3

By Sarah Oliveira

Source: NPD Group
The Consumer and Market Analysis Group purchases Market Research Reports in order to understand the possible changes in consumer behaviour and the potential for our industry to capitalize on these changes. One such report purchased is "Eating Patterns in Canada, 12th Edition". The report was published by the NDP Group.

Background

This report provides a unique look at in-home and away from home eating behaviour. **What foods do Canadians eat at different meal occasions?** Where do we eat these foods? Who eats what and how often? In this final report on Canadian eating patterns we look at the dinner habits and night snack

While more Canadians are planning their dinners ahead of time, most still decide on what to eat the same day. Just because Canadians are planning more, doesn't mean they want more complex meals, in fact it is the one base meal that is slowly growing at dinner. At 13.8%, Pizza was the top one base dinner served. Italian pasta at 12.1% was the second most likely to be served, followed by sandwiches, casseroles/one dish dinners, soup, burgers, hot dogs, salads and macaroni and cheese. Singles and family with kids were the most likely to have a one base dinner. While singles are looking for convenience in their meals, families with kids are looking for meals that the kids will like. In 2009, 54.7% of all dinners made in the home were made in 15 minutes or less.

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As consumers look for simple dinner solutions in the form of the one dish meal, they are gradually turning to the frozen aisle. Canadians report that they eat more foods from the frozen aisle and less from all other major areas. Aside from the simplicity of preparation that many frozen foods offer, they are also less perishable than many other foods, and this can help with planning meals in advance. Vegetables are ranked as the top frozen food across all family groups.

Looking at the top foods for supper, what consumers eat hasn't changed much, although rice is becoming an increasingly viable option as a starch, coming in at the third most consumed food and overtaking boiled/mashed potatoes. The move to rice is concentrated in the younger age groups, while those fifty-five and older are heavier consumers of more traditional starch dishes such as boiled/mashed potatoes.

Judging from what Canadians are eating during dinner, they are pretty healthy overall with either fruits or vegetables leading at each meal component. Meal components are listed as appetizer, main dish, side dish or dessert. Although as Canadians move towards one base dish dinners, side dishes are showing declines. The biggest declines in side dishes are in the vegetables, salads and traditional starches. From 2005 to 2009 vegetables showed a 28% decrease in consumption. When looking at side dishes, young adults in the 18 to 34 age group are less likely to eat vegetables and salads, while consumers 65 and older are less likely to adopt rice as a side dish, favouring potatoes instead. Although Canadians 65 and over are the heaviest consumers of vegetables, even in this age group there has been a consistent decline in their consumption since peaking in 2005.

Top 10 Dinner Foods by Age

Category	Average	<18	18-34	35-44	45-54	55-64	65+
Vegetables	113.3	106.7	80.1	98.7	121.9	133.9	172.5
Salads	44.4	35.6	30.8	44.6	44.9	63.2	66.4
Rice	31.7	33.8	33.8	35.3	30.5	24.5	27.5
Chicken	30.8	32.5	29.8	27.5	32.4	31.7	31.2
Boiled/Mashed Potatoes	30.6	28.3	19.4	30.1	26	38.6	54.2
Fruit	23.5	23.6	10.1	17.7	14.8	37.9	52.8
Soup	21.9	21.1	13.3	21.1	21	28.6	34.6
Italian Pasta	20.9	23.1	20.1	22.8	22	19.5	16.1
Bread: Non-Toasted	20.4	22.3	16.8	18.7	17.6	25.1	25.1
Baked/Roasted Potatoes	17.8	14.1	19	8.9	19.1	23.3	26.3

20% below average
20% above average

Canadian Consumption of Meat

Red meat is still the dominant type of meat eaten by Canadians although red meat consumption has declined in recent years.

Category	Average	<18	18-34	35-44	45-54	55-64	65+
Beef Cuts/Dishes	56.6	57.7	52	52.8	57	65.9	59.4
Chicken	46.2	54.1	45.2	43.8	50.2	41.9	36.4
Pork (excl Ham/Bacon)	22.6	22.9	21	19.1	24.8	22	26.5
Finfish	18.6	16.5	12.3	29.5	18.7	19.2	28.9
Turkey	6.6	8.9	4	8.6	5.6	8.4	4.3
Ham	6.3	6	4.4	5.6	6.7	7.4	9.8
Shellfish	5.6	4	4.5	6.1	9.1	5	5.8

20% below average
20% above average

Older Canadian consumers are more likely to eat fish than to eat beef.

Deserts and Supper

It seems like fewer consumers are eating desserts in 2009. In 2009 the average Canadian had dessert seventy-one times with dinner at home but only forty-seven percent of Canadians had dessert.

As consumers age they are more likely to eat dessert with seniors age 55+ the most likely to consume.

Canadians Consumption of Dessert in the Home

Category	Average	<18	18-34	35-44	45-54	55-64	65+
Fruit	18.6	13.9	11.1	11.5	15.7	27.3	47.1
Cookies	11.4	11	6.6	9.1	10.6	14.2	22.8
Cake	10.7	9.6	8.5	8.8	10.8	12.7	17.5
Ice Cream	9.9	10.4	7.6	7.7	8.5	11.7	16.2
Pies	6.6	4.1	3.9	4.7	6.8	11.5	14.7
Pudding	5.9	4.3	4.3	3.6	4.8	8.8	13.5
Yogurt	4.5	3.8	2.3	4	4.3	7	9.3
Pastry	2.2	1.6	1.5	1.8	2	2.9	4.5

20% below average
20% above average

Fruit is the most often food consumed for dessert, but cookies have shown a resurgence in recent years. Another thing that is happening on the dessert front is the number of consumers that are eating desserts with label claims on the packaging has risen sharply.

In 2009 14.8% of all dessert foods eaten contained a special label on the packaging compared to only 4% in 2003.

Top Dessert Label Claims

1. Low Fat
2. Light/Diet
3. Fat Free/Non Fat
4. Trans Fat Free
5. Low Sugar/Sugar Free
6. All Natural
7. Peanut Free

With the media focusing on Trans-fats you might see this claim rising in the next year.

Beverages with the Evening Meal

As with other meals fewer Canadians are drinking beverages with their dinner meal while in the home and this declining trend is not relegated to any one age group. Children and teens tend to gravitate to beverages traditionally associated with childhood, (milk and juices/ades/drinks) but not soft drinks. Similar to the in-home consumption, the away from home beverage consumption at dinner shows a longer term prevailing trend downwards.

Supplementing the In-home Dinner

Dinner is still being supplemented with either HMR (home meal replacement) or foods from restaurants. Couples without children have adopted HMR with a sizable increase in penetration over the past year. While foods carried in from restaurants are diverse, the dominant food from HMR is the salad, reflecting the supplemental nature of the HMR meal as a side dish while the main dish is taken home from restaurants. The In-home dinner is supplemented equally between the week day and the weekend.

Dinners at Restaurant

More consumers are choosing to have their meals at casual restaurants. The most consumed foods for restaurants are chicken, French fries and seafood. Below is a chart showing foods consumed by age groups.

Category	Average	<18	18-34	35-44	45-54	55-64	65+
Chicken/Poultry Entrees	31.7	31.6	31.6	26.9	35.3	31.1	34
French Fries	26.5	38.8	24.9	26.6	23.2	23.7	18
Seafood/Fish	26.5	13.9	2.9	22.9	33	34.7	41.9
Salads	26.1	13.7	20.8	23.3	35.1	35	42.3
Beef Entrees	17.3	8.7	15.7	15.9	22.5	21.8	25.3
Vegetables Non-Fried	14.7	8.4	9.9	13	17.8	21.7	28.4
Burgers	13.7	15.8	15.2	15.8	12.3	12	7.8
A/O Potatoes	12.5	5	9.1	12.8	15.5	19	22.2
Rice	10.5	6.7	9.6	10.5	13.8	11.3	13.2
Pork Entrees	9.8	7.6	9.3	10.3	11.7	9.8	11

20% below average

20% above average

The fastest growing foods at foodservice are a/o potatoes, beef entrees, chicken/poultry entrees, pizza and pork entrees. The fastest declining foods at foodservice are salads, French fries, vegetables non-fried, a/o side dishes and frozen sweets.

Dinner meals have become more center of the plate focused as consumers cut back on the consumption of meal add-ons such as side dishes and desserts.

Carbonated soft drinks are the most popular beverage consumed at dinner while dining in a restaurant although the 65+ group shows a 20% below average consumption of this drink. Although the top choice they are the fastest declining beverage consumed at restaurants. Alcoholic beverages, hot coffee or hot tea are the beverages of choice for the 45 to 65+ group.

The fastest growing drinks for foodservice are non-carbonated drinks, hot tea, juice, iced tea and hot coffee. The fastest declining drinks are bottled water, carbonated soft drinks, alcoholic beverages, tap water and milk. Consumers are more likely to have a carbonated soft drink with dinner if it is included in a combo meal.

Dinner Finding

To sum up the dinner findings among Canadian consumers, we are looking for easier but not necessarily quicker meals. We are seeing a slow but steady growth in the one base dish and an increase in frozen foods. Canadians spend the same amount of time cooking today than they did in 1999. Families with children and singles are more likely to use the one base dish. Families with children are more likely to eat pizza while singles veer more towards sandwiches. We are eating less side dishes and vegetables, the most prominent side dish at dinner, is driving this decline dropping 28% since 2005. Seniors show a disproportionate influence on this downward trend for vegetables.

Seniors remain as the group of consumers that still enjoy desert with their meals. They are way more likely to have desert than younger adults. Indulgence is still the driver for this group.

Evening Snacks

Snacking is the fastest growing meal occasion. More and more snacks are being carried from the home. Singles, the life stage that requires the least structure in their meal habits, snack the most. As singles snack more, they are also skipping more meals than any other life stage group. Singles are more likely to eat nuts, cheese and vegetables, foods that provide nourishment, as a snack. The top three snack choices for the total population are fruit, cookies and yogurt. When it comes to the top foods eaten as a snack, those classified as better for you are climbing in rank. Yogurt is the top growing snack food. The fruit most consumed as a snack is apples, banana and oranges/tangerines. Among berries, blueberries are resurging. The fact that they contain antioxidants, which is growing in importance to the consumer, may be one of the main drivers of this growth.

While the morning and afternoon snack is predominately made up of better for you foods the evening snack continues to be a snack of indulgence. **The reason consumers most cited for eating an evening snack? They like the taste and had a craving for it. Most evening snacks are consumed in front of the TV, and as the evening wears on, consumers are more likely to reach for a snack. Salty snacks are the most popular to eat in front of the TV.**