

Consumer Insights into Lunchtime

Ireland Foodservice Seminar
6 November 2013

Paula Donoghue, Insight & Brand Manager

Growing the success of Irish food & horticulture

Bord Bia
Irish Food Board

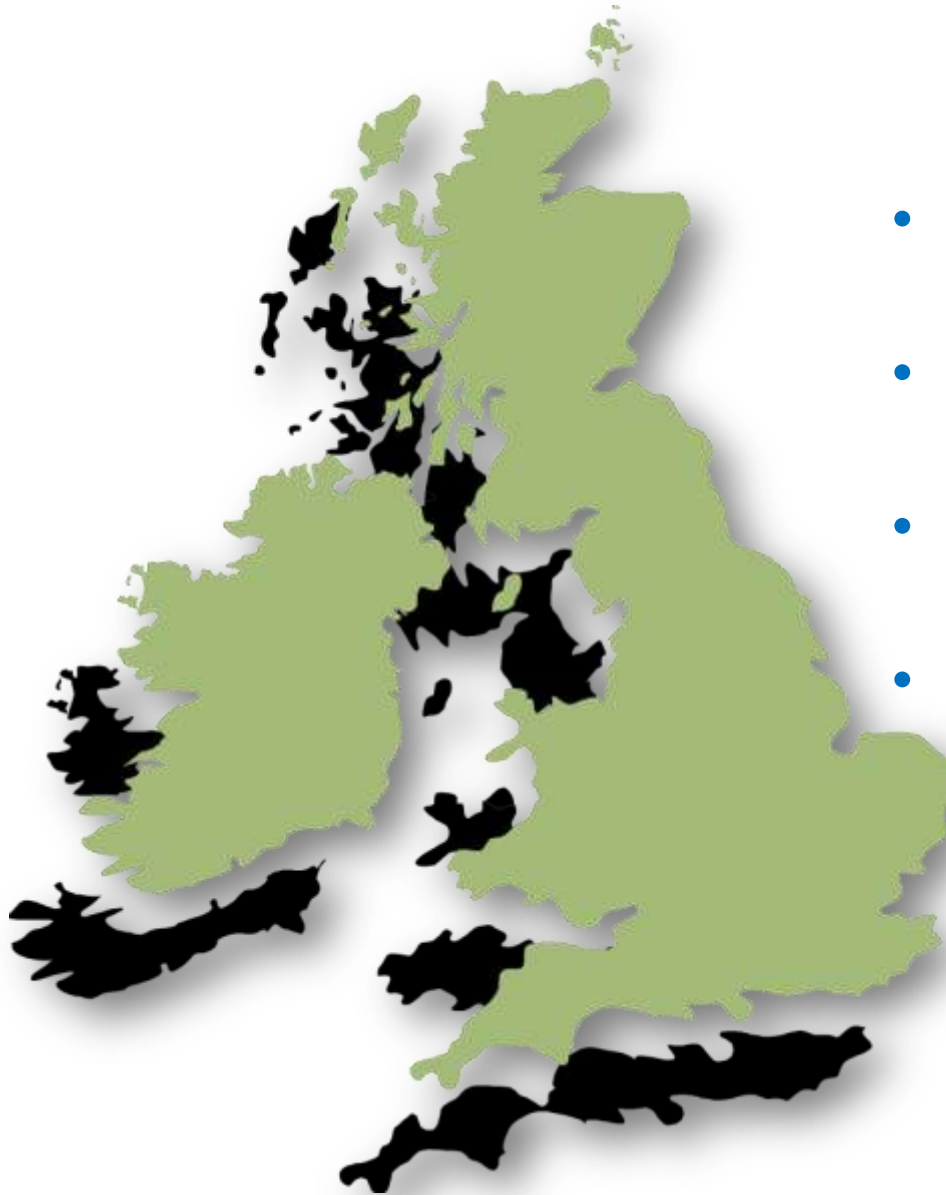
About the study

Lunchtime activities

Where: At Home
 At Work
 On the Move
 Eating Out

The kids lunchbox

Takeaways



- Ireland & Great Britain
- Questionnaire
- 7 day diary
- + 7,000 lunch occasions

Who we talked to..



About the study

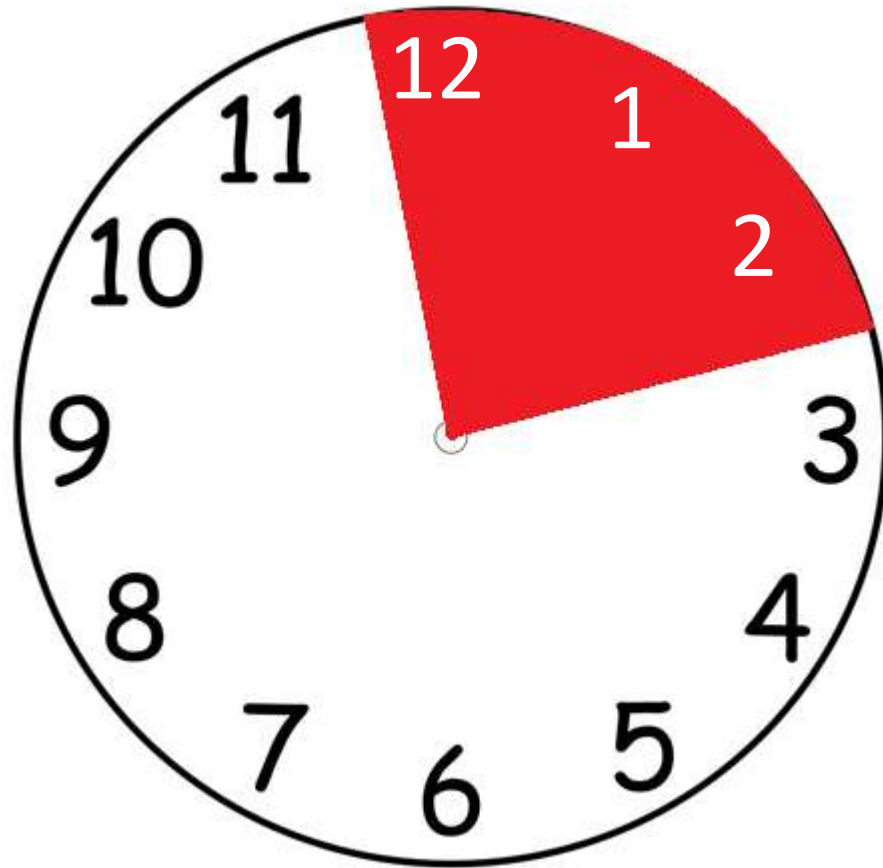
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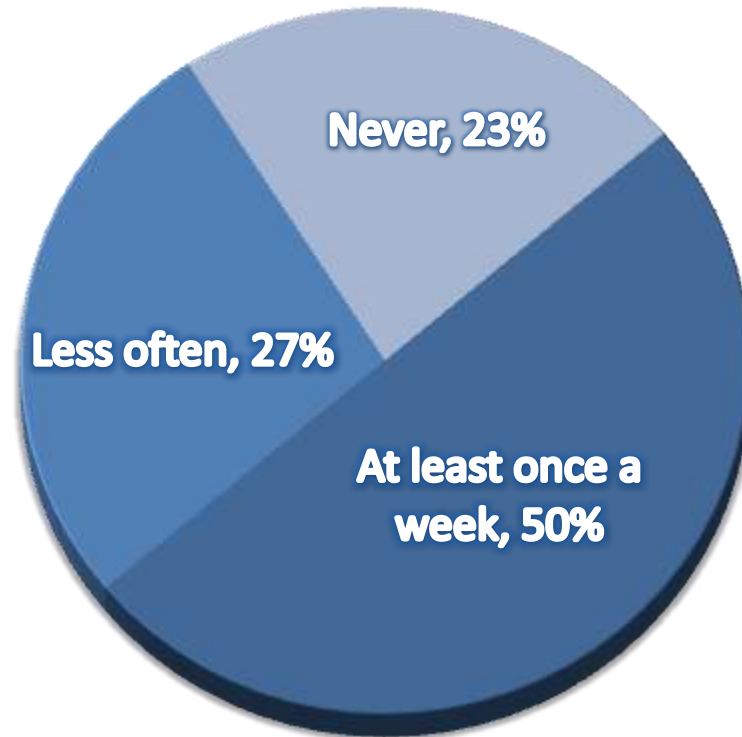
It's lunch time



But it's not all about food




1 in 2 work at lunchtime



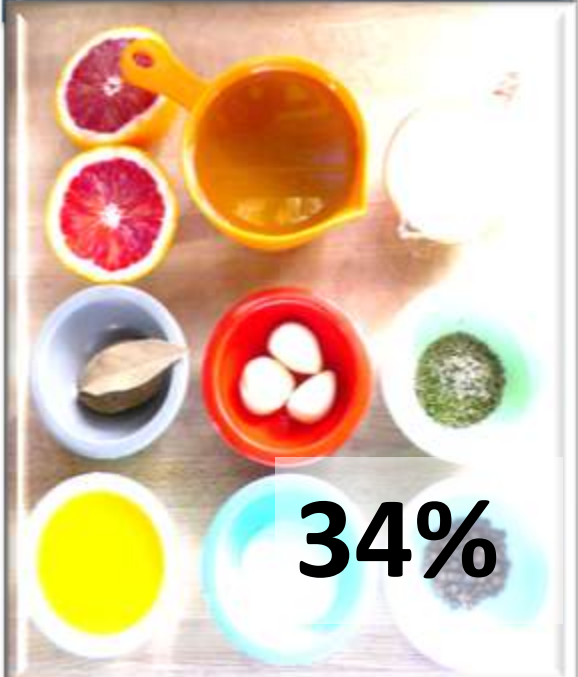
Why we choose our food

Budget




36%

Know Ingredients



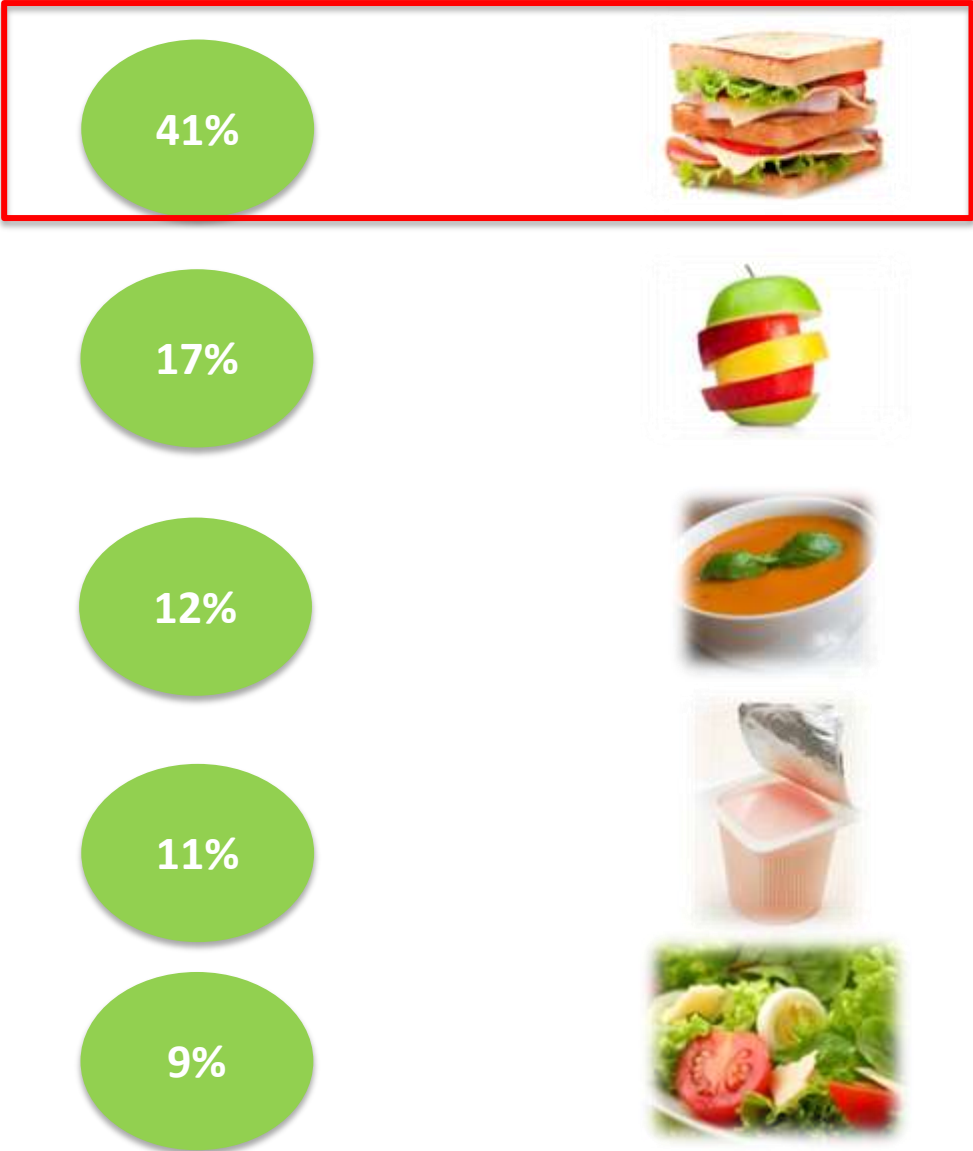
34%

Healthy Diet

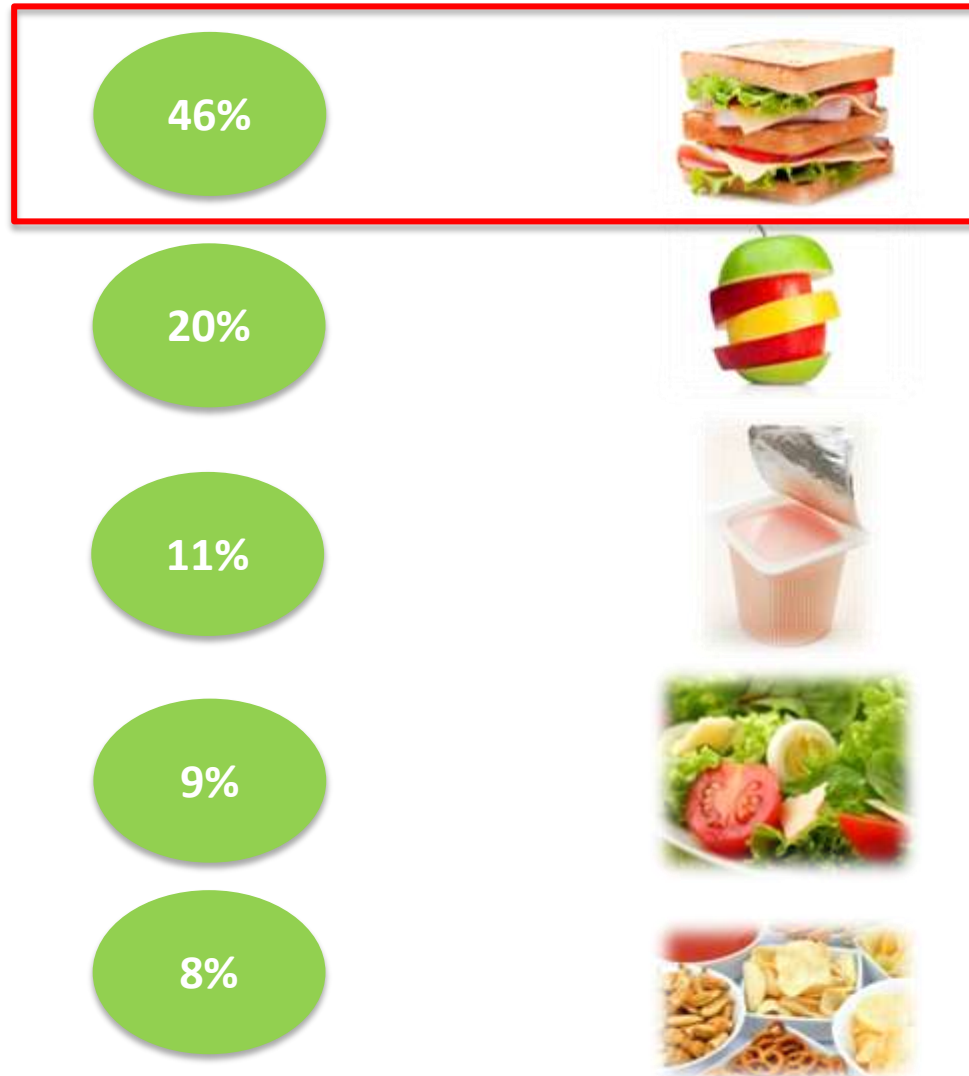


20%

Ireland's favourite lunch



Great Britain's favourite lunch



Average Spend



€4.91

£4.62



€7.77

£5.20

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Where do we eat our lunch?



At Home



Weekdays

49%

57%

Weekend

68%

77%



Lunch at home



Controlling budget

34% (27%)



Like to know ingredients

34% (32%)



I am controlling my diet

20% (16%)

90%

95%



What we eat midweek



Is slightly different at the weekend



What we drink



Varies more over the weekend



At Work



Weekdays

29%

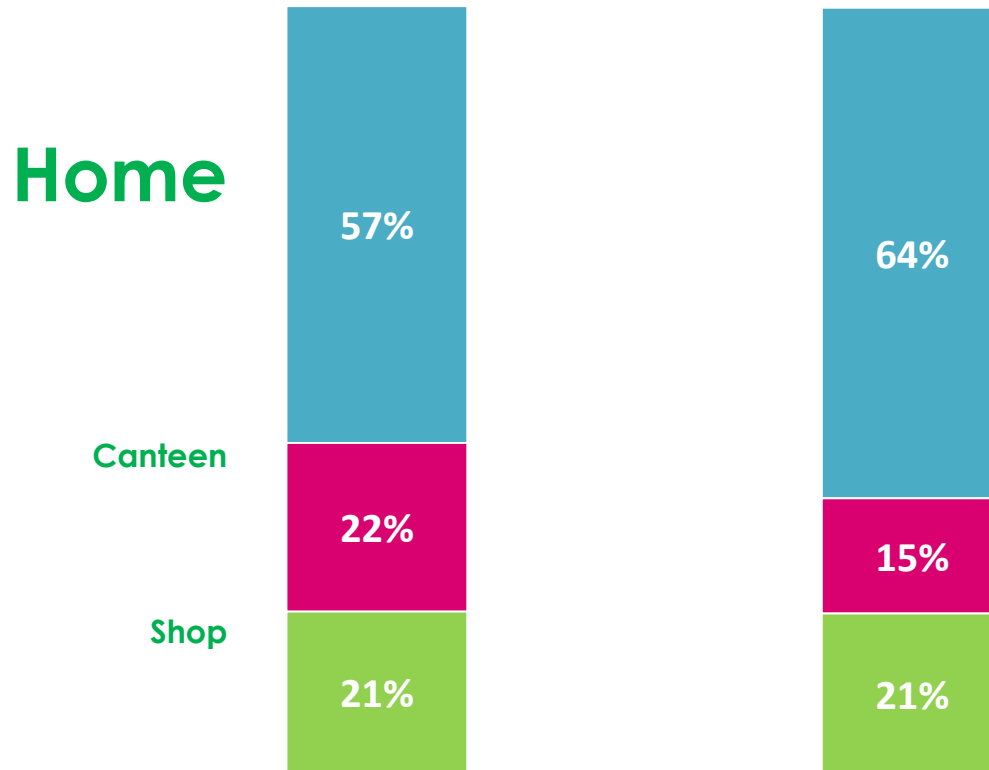
27%

Weekend

7%

5%

Breakdown of lunch at work



Lunches brought from home...

Again mostly purchased during their main grocery shopping trips at the main multiples

52% Controlling budget

37% Prefer to make their own

26% Watching my diet

1 in 5 lunches are purchased to bring back to workplace

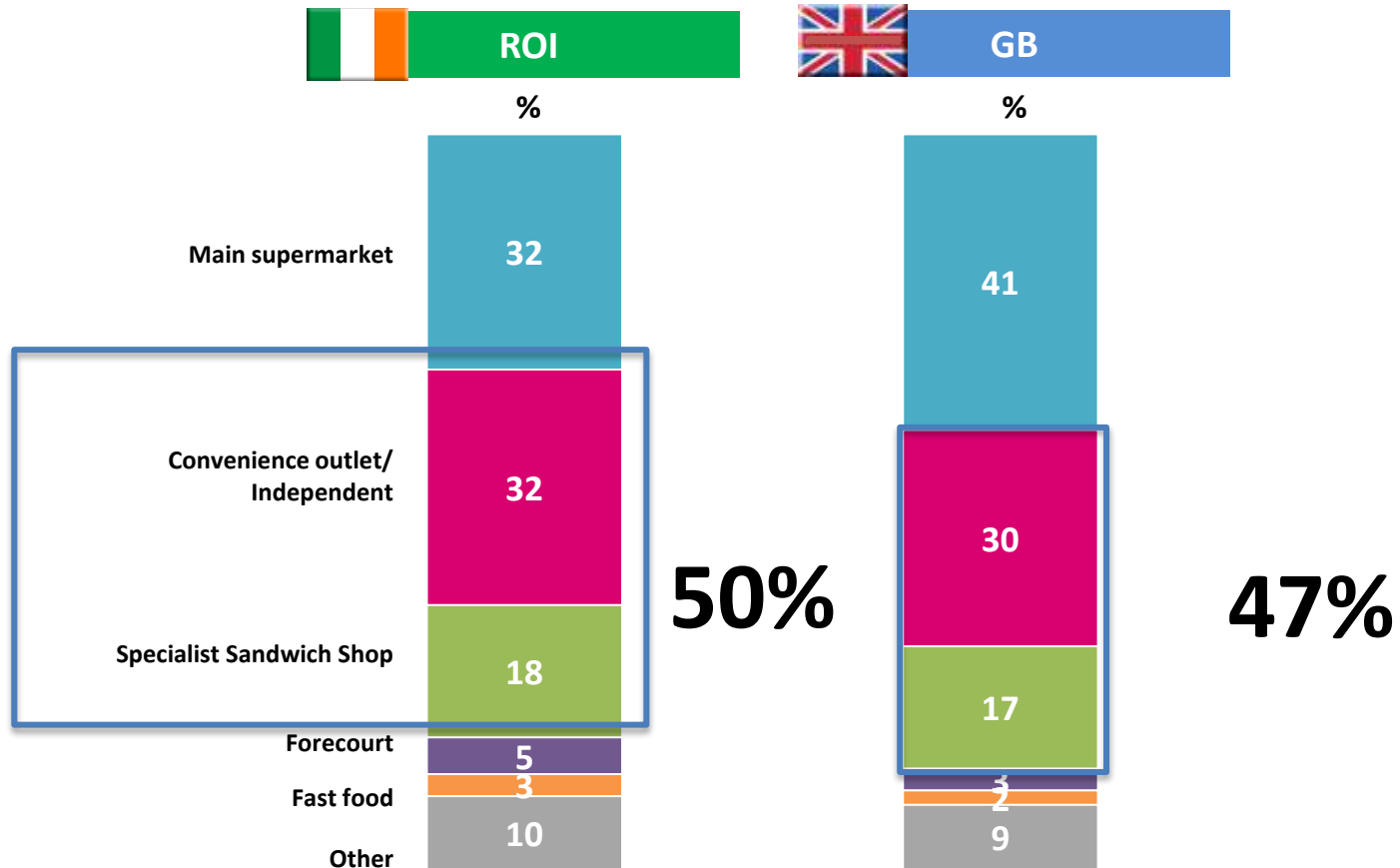


Lunches purchased and brought back to work

21%

21%

Where do we buy these lunches?





Proximity

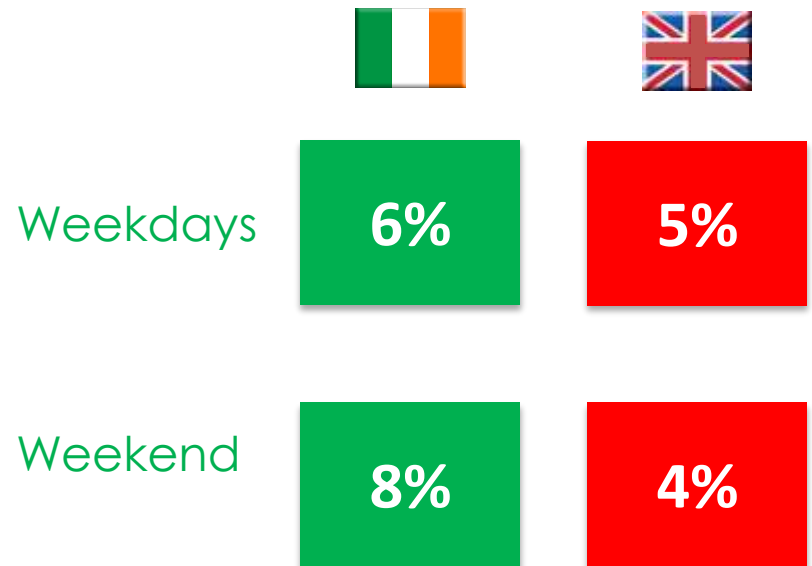
Our choice of lunch at work





Coffee now
is the # 1
choice

On the Go..



More variety in retailer type

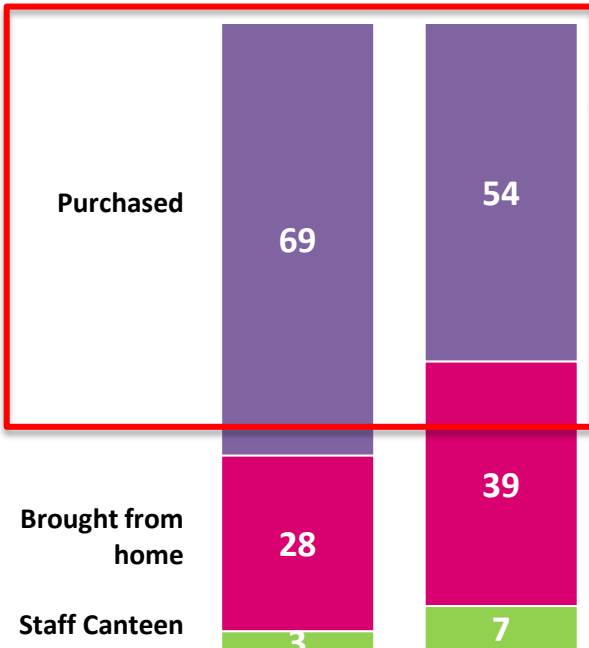
Where does lunch come from?



%



%



%

%

Fast food outlet

21

33

Convenience outlet/ Independent
Specialist sandwich shop

19

23

9

Forecourt

29

19

Supermarket

9

Other

21

8

7

Choosing lunch on the go



Cost

Good value for money

40%



That it is easy to eat on the move

38%



Taste

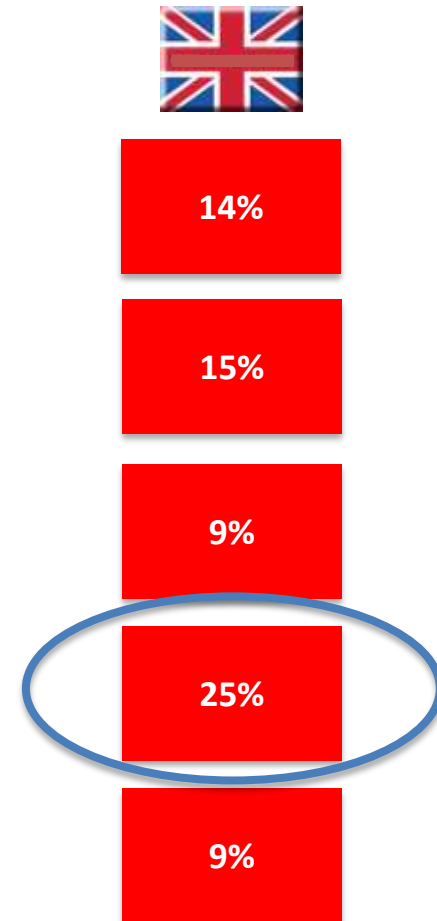
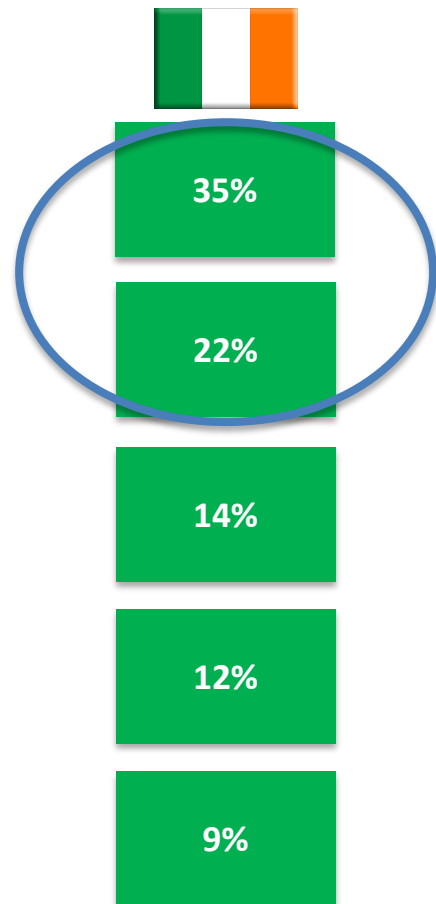
just that I enjoy it

34%

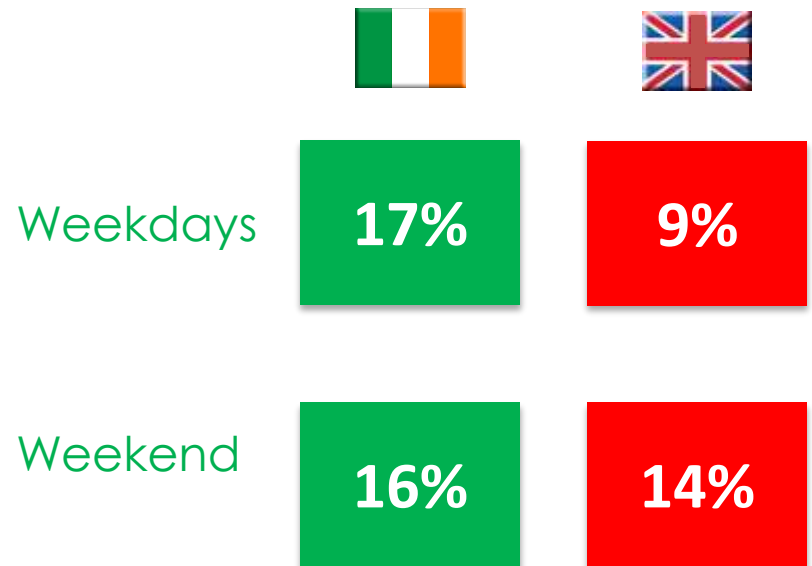
Still sandwiches but goes beyond that



More bottled water and coffee when on the move



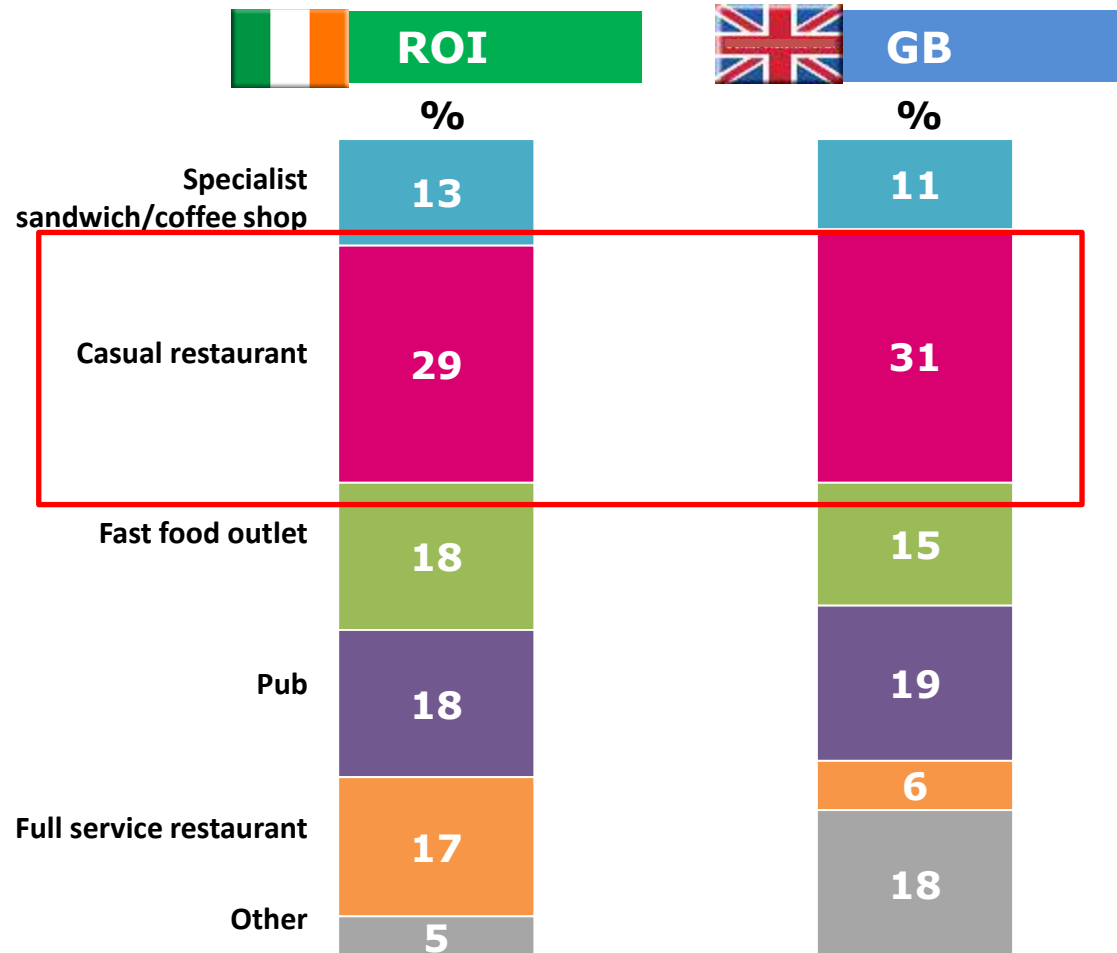
Eating Out..



Type of serviced venue – mid week



Wide variety of serviced venues used at the weekend?



What's important when eating out?

Specialist Sandwich/Coffee (32%)

%

Food quality/taste



64

Was/Is the closest/its convenience



58

It's good value



55

Good choice of food



49

Quality of service



36

Casual Restaurant (31%)

%

Food quality/taste



58

Was/Is the closest/its convenience



55

Good choice of food



49

It's good value



48

Know the staff/its familiar



36

Fast Food Outlet (11%)

%

Wanted something fast



60

It's good value



53

Was/Is the closest/its convenience



44

Speed of service



37

Food quality/taste



35

ROI slightly healthier when eating out mid week



34%

17%

14%



25%

15%

15%



Coffee and soft drinks rise



At weekends it's indulgence



The best serviced venues have

32%
Convenient
location

35%
Value for money

31%
Quality food

24%
Range/ variety
of food on offer

20%
Efficient
service



The downsides to lunching out

20% Speed of Service

19% Too expensive



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Mum's the word

A hand is shown placing a slice of apple into a clear plastic lunchbox. The lunchbox is divided into compartments. One compartment contains a sandwich with lettuce and a dark spread. Another compartment contains several slices of apple. A third compartment contains carrot sticks. The background shows a wooden cutting board with more apple slices and a carrot.

80 % prepare lunch

75% choose
ingredients

Why?

Much the Same – 25%

**Child is sure to like
and eat it 64%**



Vary a Little – 68%

**Enjoy the
variety/would tire of
similar foods**

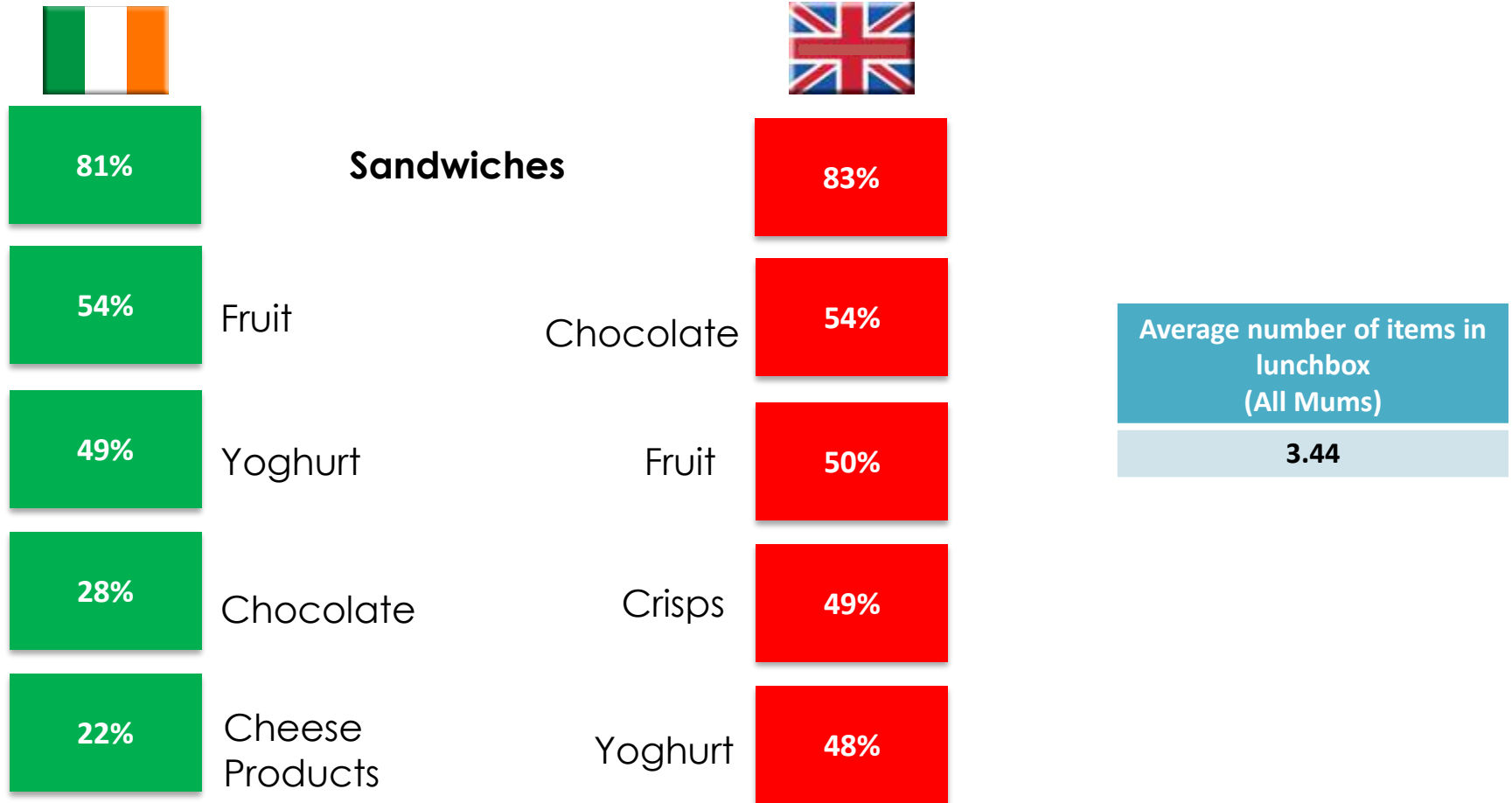


Vary a Lot – 7%

**Healthy/ nutritional
value 75%**



Lots in the lunch boxes



Fruit drinks and water for drinking



38%



34%

28%



33%

9%



15%

2%



10%

Good value for a lunchbox



Considered good value	€2.62
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Considered good value	£2.39
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Eating isn't always top priority



1 out of 5 lunches are purchased or eaten out

People want control



Sandwiches still our #1 choice



Coffee intake rises when purchasing lunch





Taste & convenience most important factors for serviced lunches

Upcoming research

Insights Session – 28 November

- The Lunchtime Occasion
- Retaining Loyalty to Irish Brands

Feeling the Pinch – January 2014

Snacking Study – February 2014

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