

Good
Sense
Research. + tfp

Future Food

Bringing Trends To The Table



WHO ARE WE?

An exciting collaboration between **thefoodpeople** and **Good Sense Research** in partnership with HRC, IFE and Speciality & Fine Food Fair

2006

thefoodpeople were using the power of trends to shift the future of food and drink

2020

thefoodpeople and **Good Sense Research** worked together to form The Future Food Tracker



2017

Good Sense Research were busy building their nationwide consumer community.

2023

This is our third year working on measuring acceptance to food trends

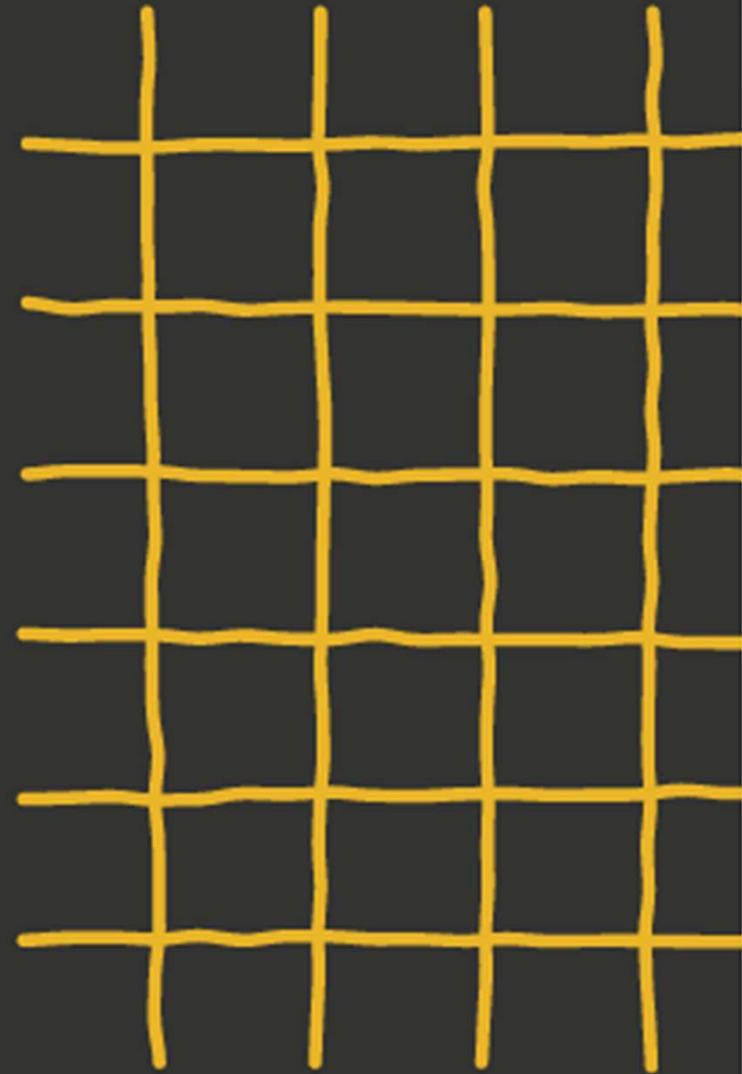


The Future Food Tracker

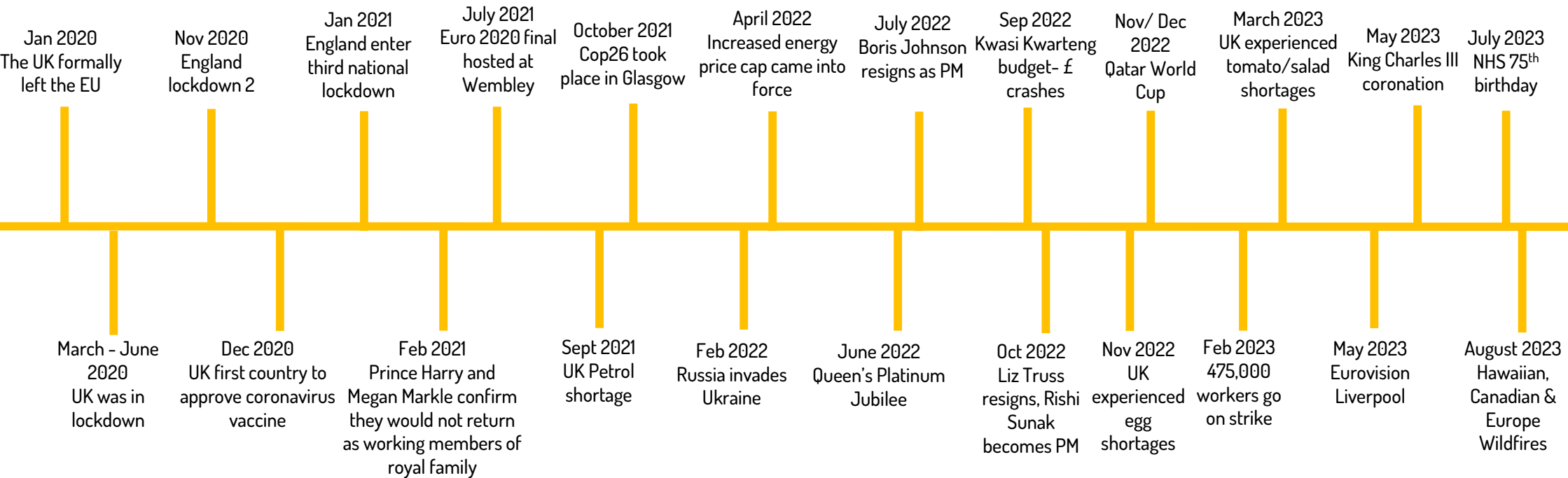
We survey 400+ consumers monthly to understand the relationship between future trend predictions and acceptance with over 16,800 consumer touchpoints

We have summarised the full report to actionable insights to help businesses flourish in 2023.

400 consumers surveyed monthly for 3 years.



WHERE ARE WE?



Q3 2023 Key Insights

THE TOP 5

Q3 2023 Key Insights

Confidence is growing slowly but surely

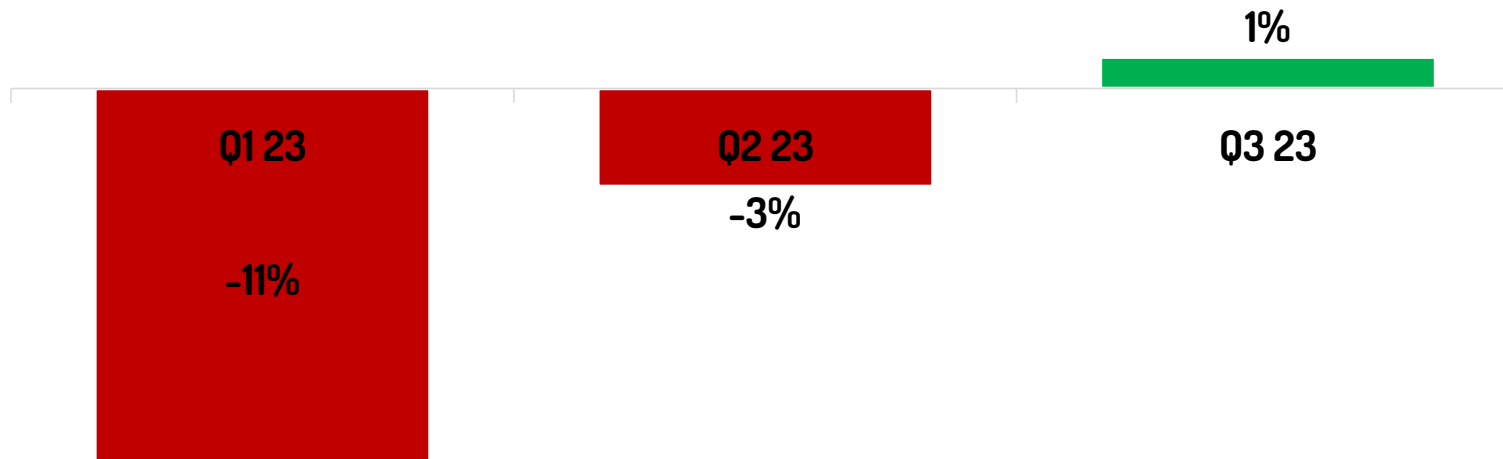
People are gradually becoming more confident, showing steady and positive progress.

#Insight 1:



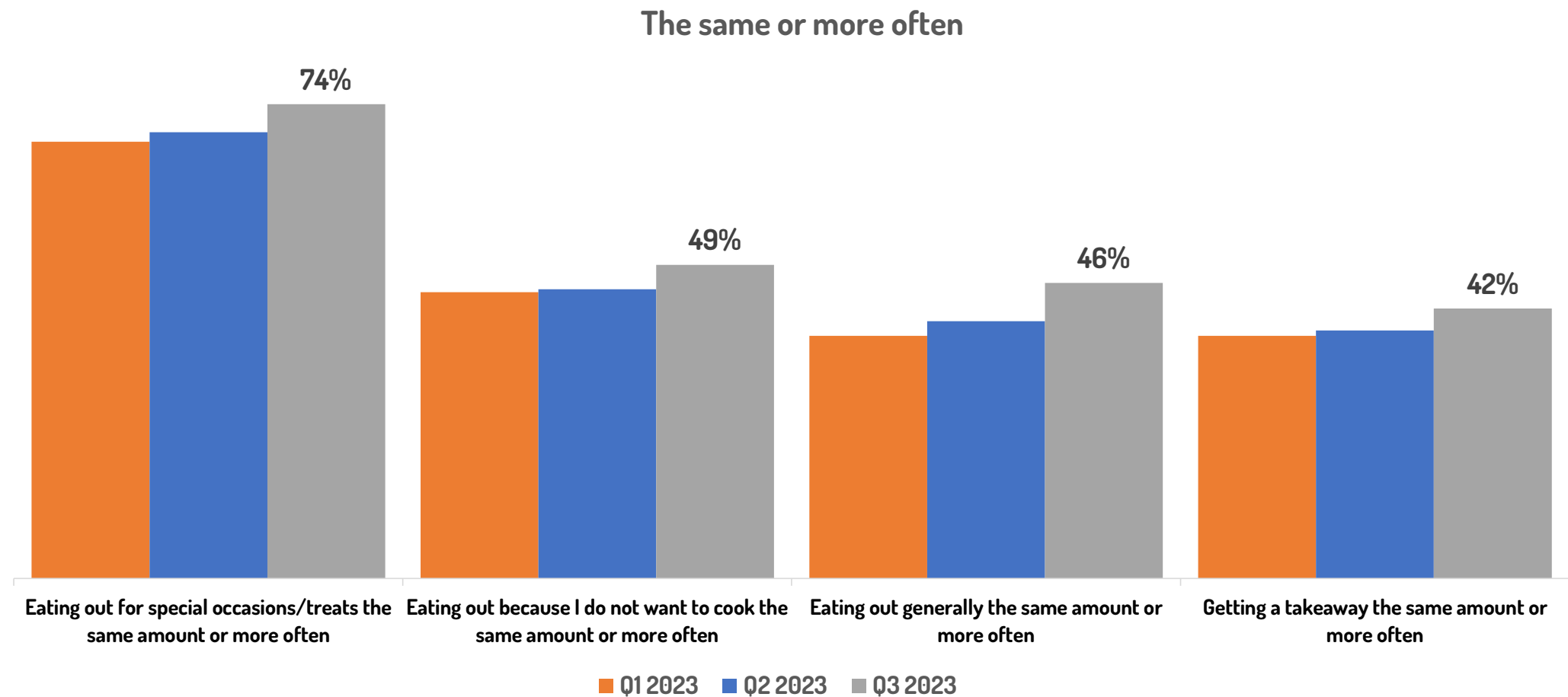
Q3 is the first quarter that more people are feeling optimistic about the future than pessimistic.

How people are feeling about the future



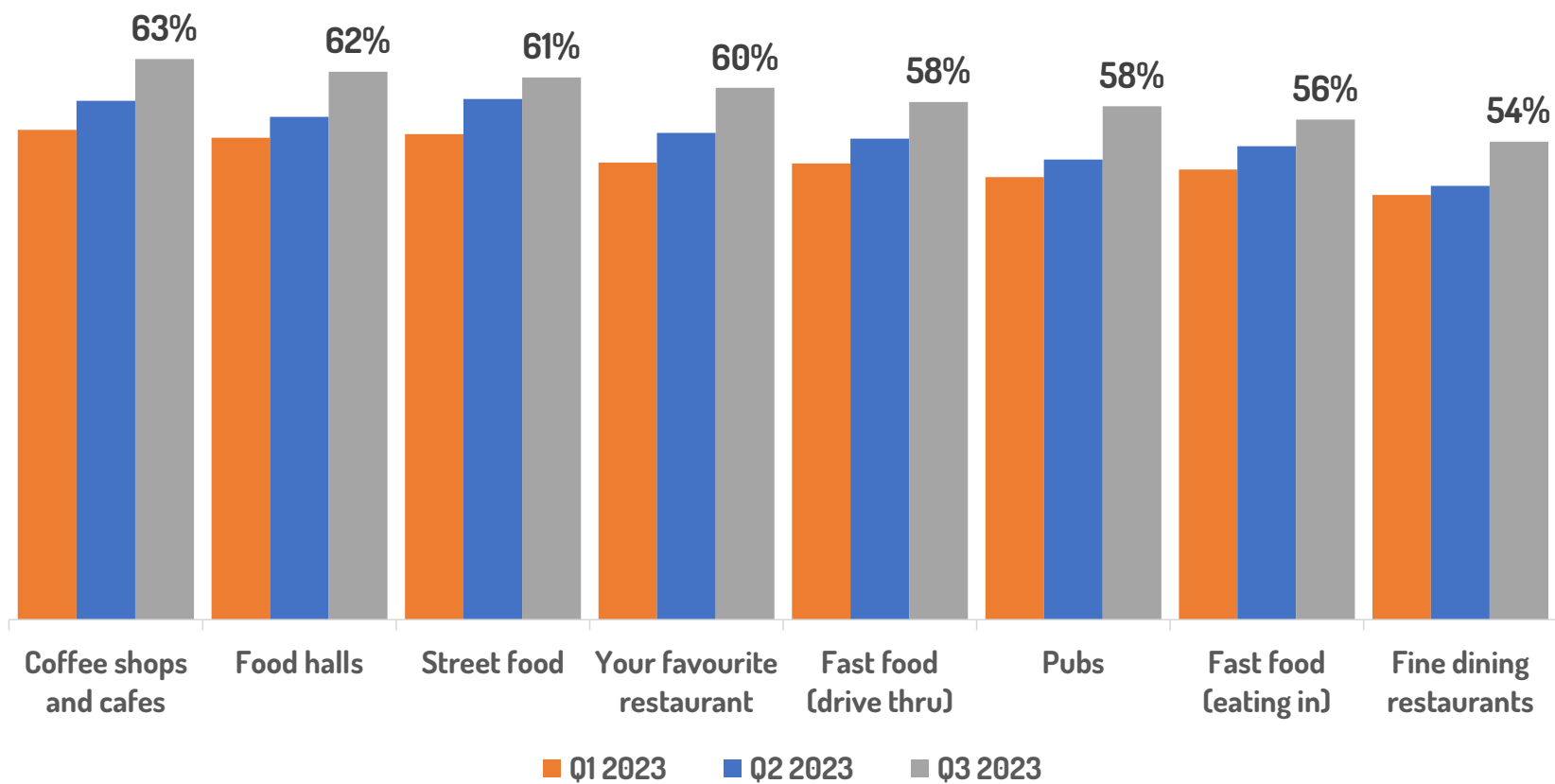
- **38%** think those searching for a job will be able to find one (+5% from Q1)
- **28%** are confident the UK will recover from the recession (+4% from Q1)
- **19%** believe employees will avoid redundancy (+4% from Q1)

With greater confidence, people are eating out more often.




...And this is happening for all food service venues, particularly for males and those younger and older age groups.

The same or more often



Significantly more males and individuals aged 18-34 and 55+



**The number of people who are
confident supermarket prices will
remain the same has doubled since
Q1.**

Confidence is growing but agility is paramount in what continues to be an unstable world – expect this for some time to come



It's a well-trodden path but comfort and nostalgia is just as pertinent for the future as it is today – food brings joy!

- In times of stress or trauma we look to distract ourselves and escape, this is often achieved through comforting and nostalgic food and drink experiences
- Elevating simple food can still bring a smile of joy and make you happy
- Playing it safe and simple reduces the risk in challenging times.
- Maximising taste through new creative boundary combinations of safe, comforting, nostalgic ingredients to do this
- Just because its familiar doesn't mean it can't be innovative and progressive

A few examples...

It's a well-trodden path but comfort and nostalgia is just as pertinent for the future as it is today – food brings joy!



Chocolate and Feta Cookies



Miso Mustard



Alex Stupak - \$29 Hot Dog



Knickerboker Glory –
Dovetale – Tom Story



Gilda Grilled Cheese – pepperoncini, olive, anchovy
relish stuffed inside a double crunch grilled cheese
sando filled with Manchego and Gruyère

- How do you bring joy in a gloomy world?
- What does twisted familiarity mean for you?
- Who could you collaborate with to resonate in these times
- What's your heritage, your back story, how you engage on a deeper emotional level?

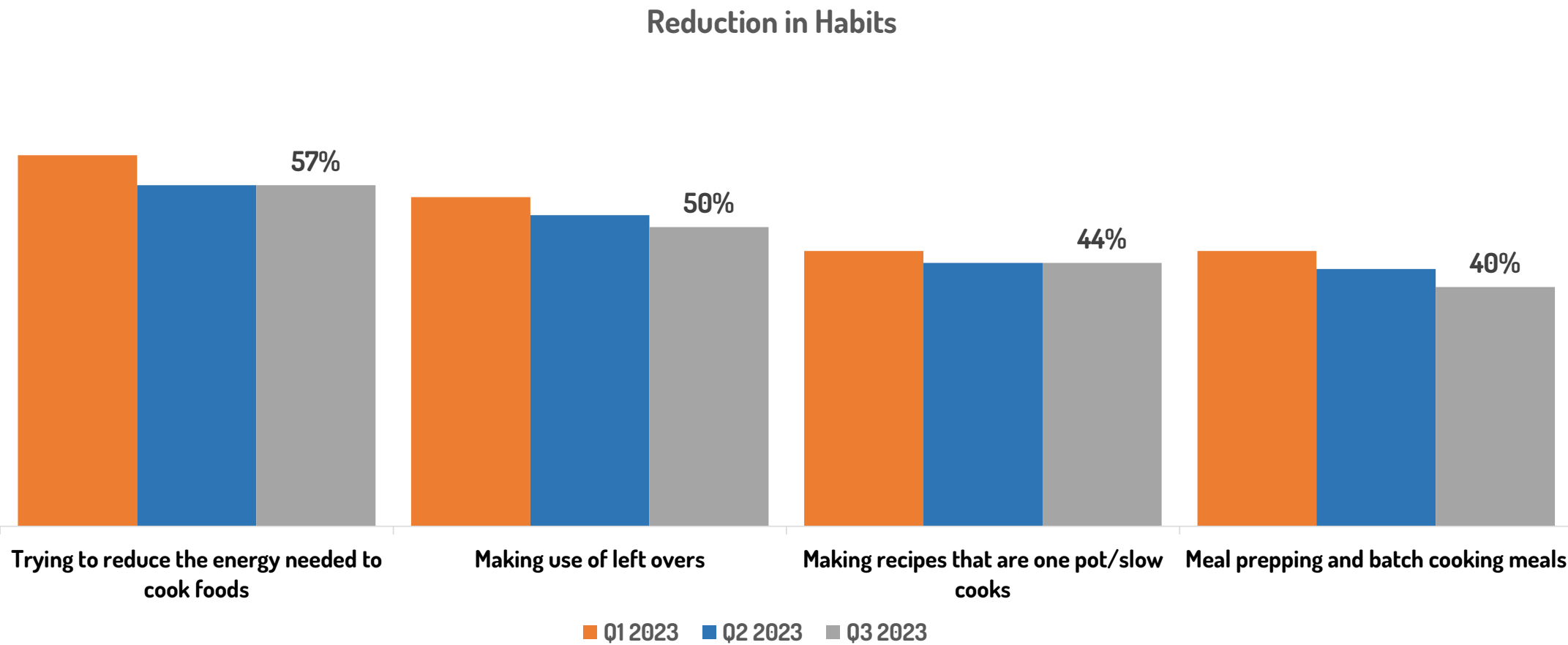
Q3 2023 Key Insights

Double standards to waste reduction

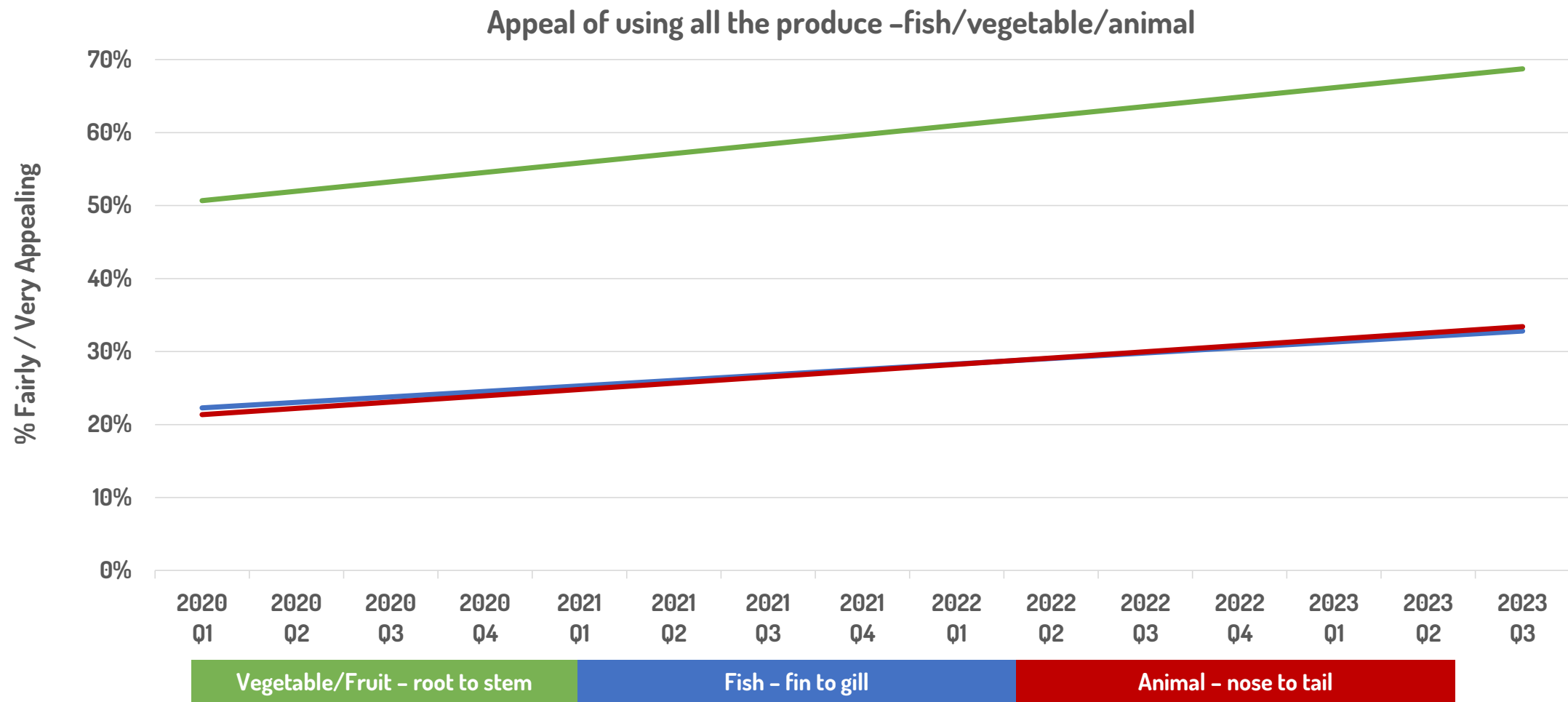
While people are being less conscious about reducing wastage at home, they are still expecting operators and businesses to do this more than ever.

#Insight 2:

As confidence is improving, the cost saving techniques people were doing are reducing.



...but they are expecting businesses to do this more.



People are keen to pass this responsibility onto others.

*'We do our bit where we can, but to be honest, I think it's **on the supermarkets to do more**, they have more influence than me.'*

*'It's **up to the Supermarkets** to make sure they are choosing the right suppliers.'*

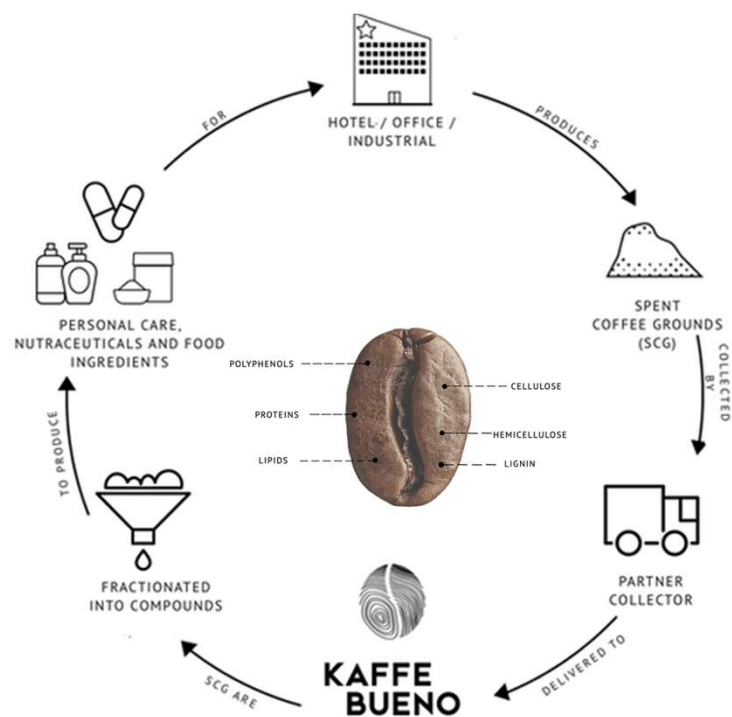
*'It's like they think it's **up to us to make the changes rather than looking at themselves.**'*

Whilst it is declining in importance (for now) at home, it's a prerequisite for business and a platform to innovate and to demonstrate relevance

- Chefs and operators shift waste reduction initiatives to a foundation part of the menu description and selling story
- Restaurants get creative with staff meals to minimise waste and leftovers
- Gene editing to eliminate the precursors to waste
- Technology is a key enabler in 'system thinking' which in turn is exposing the value of waste side streams with the potential to disrupt value chains

A few examples...

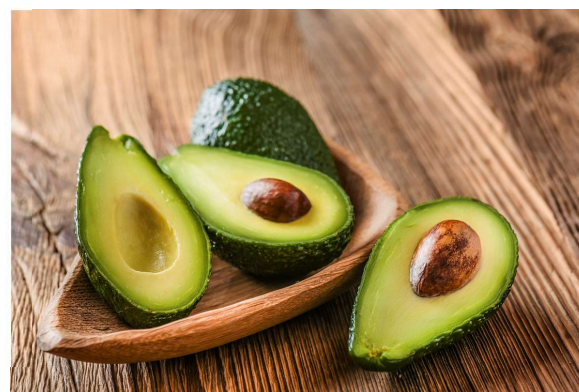
Whilst it is declining in importance (for now) at home, it's a prerequisite for business and a platform to innovate and to demonstrate relevance



Olive brine in Dirty Martini



Edit Hackney – root to fruit



Non browning Avocado



Papi London – Zero Waste

The appetite for whole animal or vegetable cooking sits as part of a wider shift towards loving the overlooked.

- The waste conversation is becoming more evenly weighted cost and sustainability
- Not to be overlooked - continued demand for plants / ugly veg but not pigeonholed as plant based
- Whole animal / whole butchery concepts
- Ex - dairy cows, Cull Yaw / retired sheep, Older / laying hens/ducks
- Nose to tail / fin to gill, leaf to root becomes a necessity
- Bones 'n' all




Q3 2023 Key Insights

The Protein Pendulum

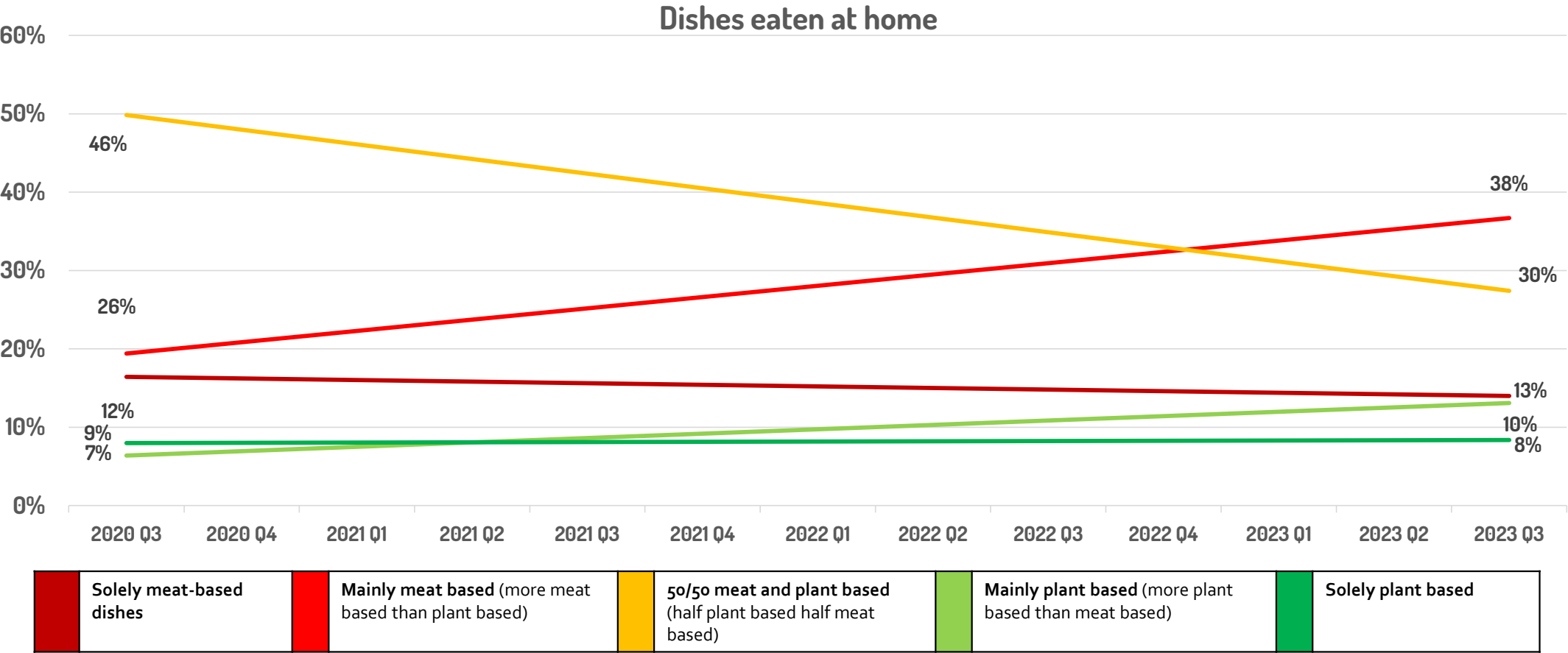
People are on a journey of questioning meat and plant based; they are confused on where to go.

#Insight 3:

A photograph of a gravel path in a forest that splits into two directions. In the foreground on the left, there is a wooden signpost with a blank, weathered wooden sign. The path is surrounded by green grass, small yellow flowers, and scattered rocks. The background is filled with tall evergreen trees under a clear sky.

**People are more confused on what
is best for them and are
questioning what they believe**

Mainly meat and 50/50 plant based and meat based cross over at the end of 2022 with the trend continuing.



Reasons for people eating less plant-based diets and more meat dishes:

Exploration of new flavours and foods

'I like to try new things and am enjoying a variation of dishes'

Financial considerations

'Cost of plant-based meals has increased a lot'

Health reasons and dietary needs

'I am eating less plant based as it is often processed'

Personal preference for meat taste

'My personal preference is for meat'

Environmental Concerns

'Less plant based as it's worse for the environment'

Change in living circumstances

'Now living with my partner so easier to cook one meal'

Availability and quality of meat

'Good quality meat for cheaper prices'

Convenience and variety of meat dishes

'Convenience when cooking for multiple people'

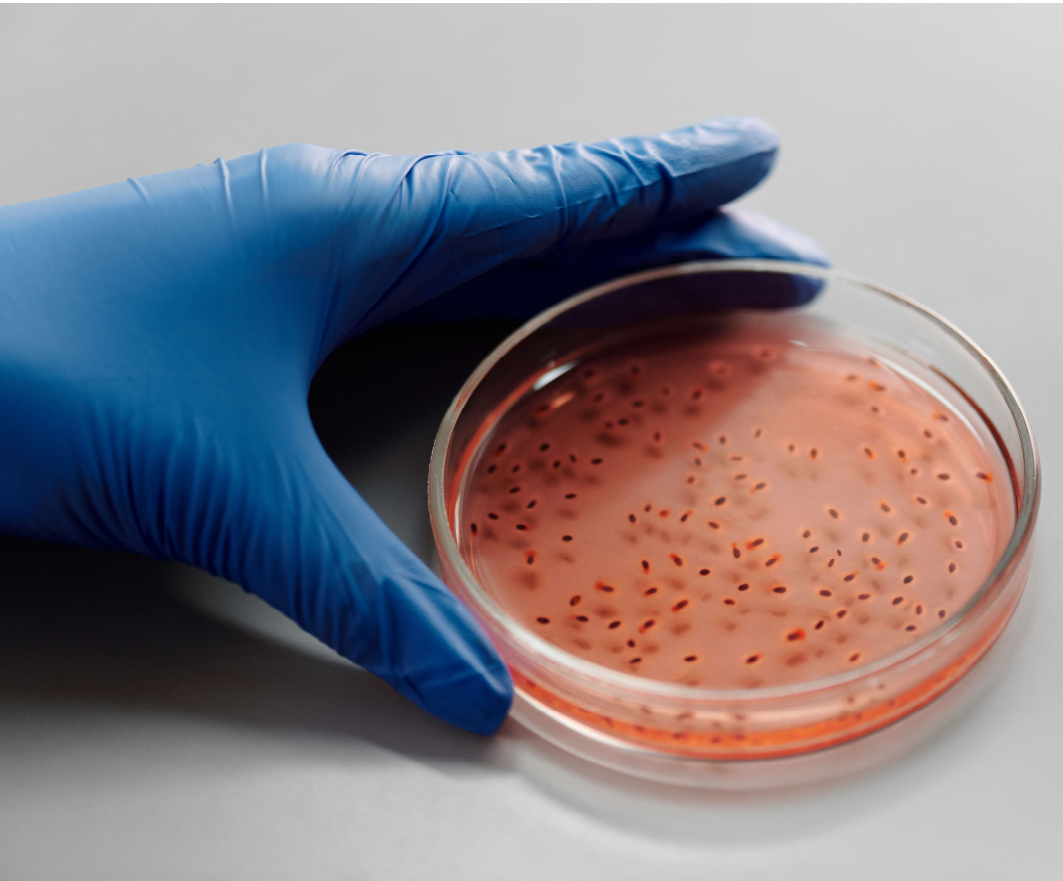
Desire for more protein and nutrients

'I decided I needed more protein and nutrients'

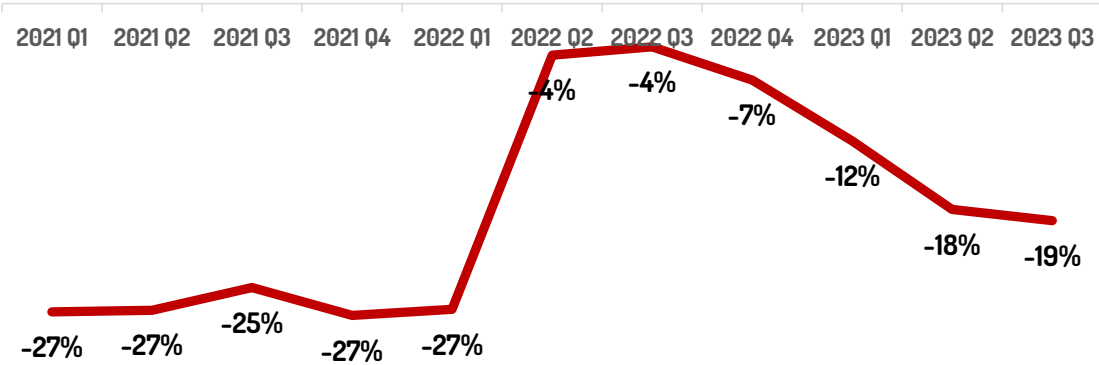
Fitness goals and muscle building

'I am looking to build muscle'

Overall cellular meat still has a long way to go to be seen as appealing.



Net Appeal of restaurants that use 'Cellular Meat'

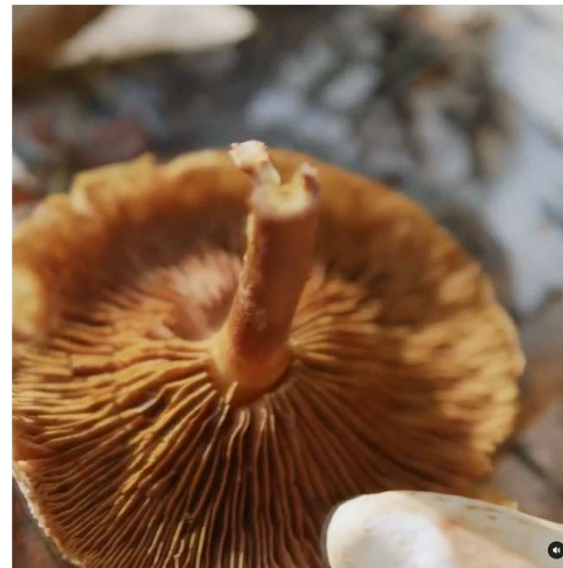


With the backdrop of the external environment and an equal strength of voice in both plant based and meat centric – the pendulum will continue to swing

- Plant based brands will continue to work on eating quality, flavour, innovative context/occasion, investing in price as well as core esg messaging – this is key in the current climate
- Farmers, meat brands and chefs have a newfound share of voice on esg with initiatives such as regenerative agriculture, for some meat is a treat when eating out and provides an element of comfort when eating at home as well as being more affordable
- We've likely reached peak plant on menus
- We're seeing more meat and plant extremes
- With the external environment forecast to remain unstable expect the yoyo to continue

A few examples...

With the backdrop of the external environment and an equal strength of voice in both plant based and meat centric – the pendulum will continue to swing



Quorn working hard on application relevance, education, taste context and eye-catching comms

With the backdrop of the external environment and an equal strength of voice in both plant based and meat centric – the pendulum will continue to swing



Crocadon Farm – Red Buck Deer



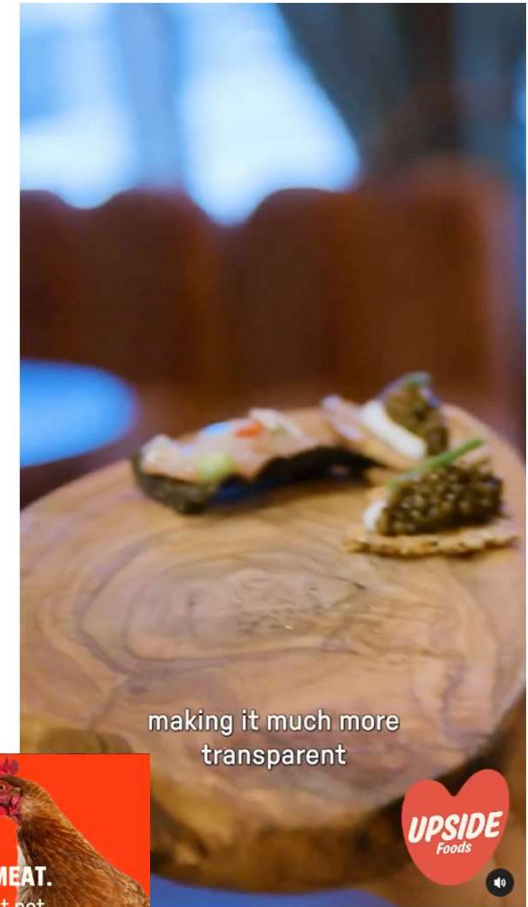
Bone marrow rotisserie prime rib –
Jorts Kitchen



Grassfed – London

The Animal / Agriculture Paradox – Humans love animals but also meat!

- USDA & FDA cleared for sale – Upside Foods become the first company in the world to receive a “No Questions” for cultivated meat, poultry, or seafood – they accept Upside’s conclusion that its cultivated chicken is safe
- As the reality comes closer for cultivated meats, the appetite dips but a number of significant hurdles have been crossed in the journey to commercialisation and scalability
- Bioreactor technology advancements that allow higher solid to liquid ratios resulting in higher productivity
- At the same time, the miniaturisation of technology that could enable local lab grown production on farms made by farmers
- Reduction in cell feed costs as food grade rather than pharma grade ingredients are proven
- Dutch government commit €60m to Cell based meat centre of research and approve for sampling



making it much more transparent



Q3 2023 Key Insights

Sustainability has been recession resilient

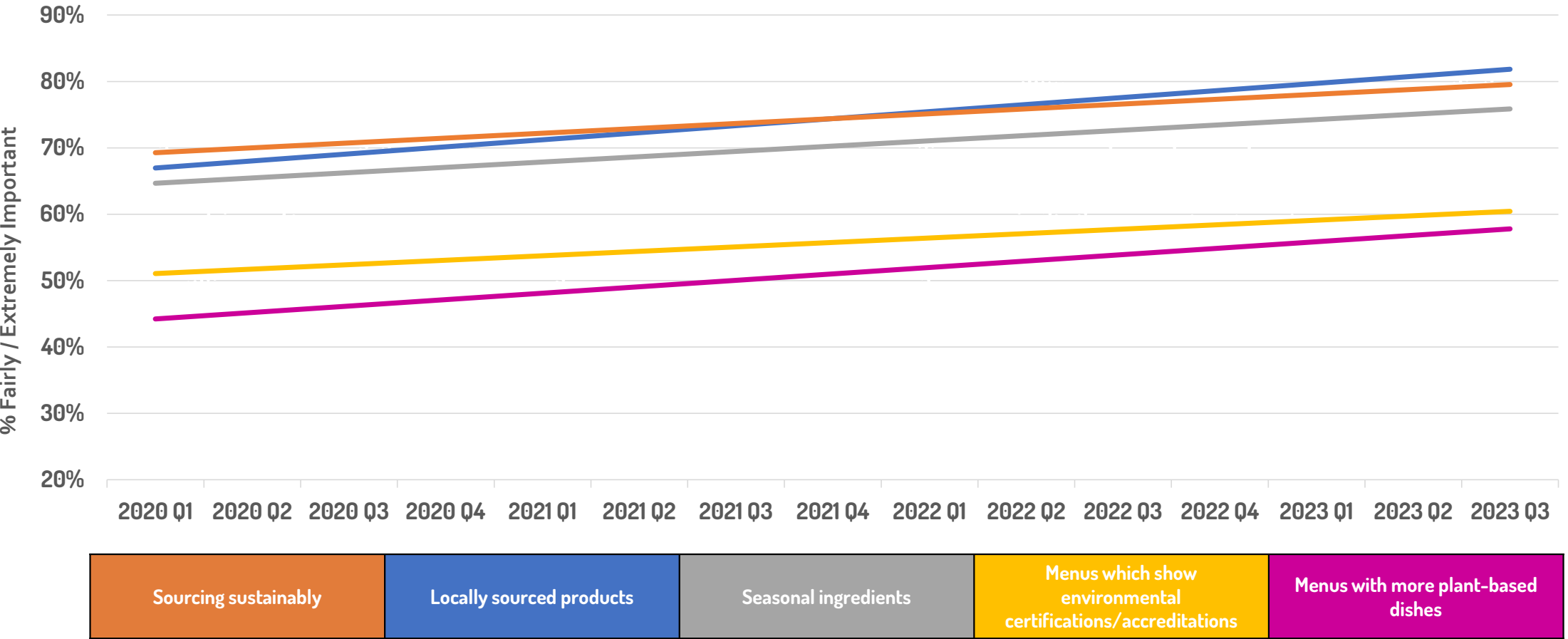
Cost of living initially made people eat out less often but when they are eating out, sustainability initiatives that operators can provide are still as important as ever.

#Insight 4:

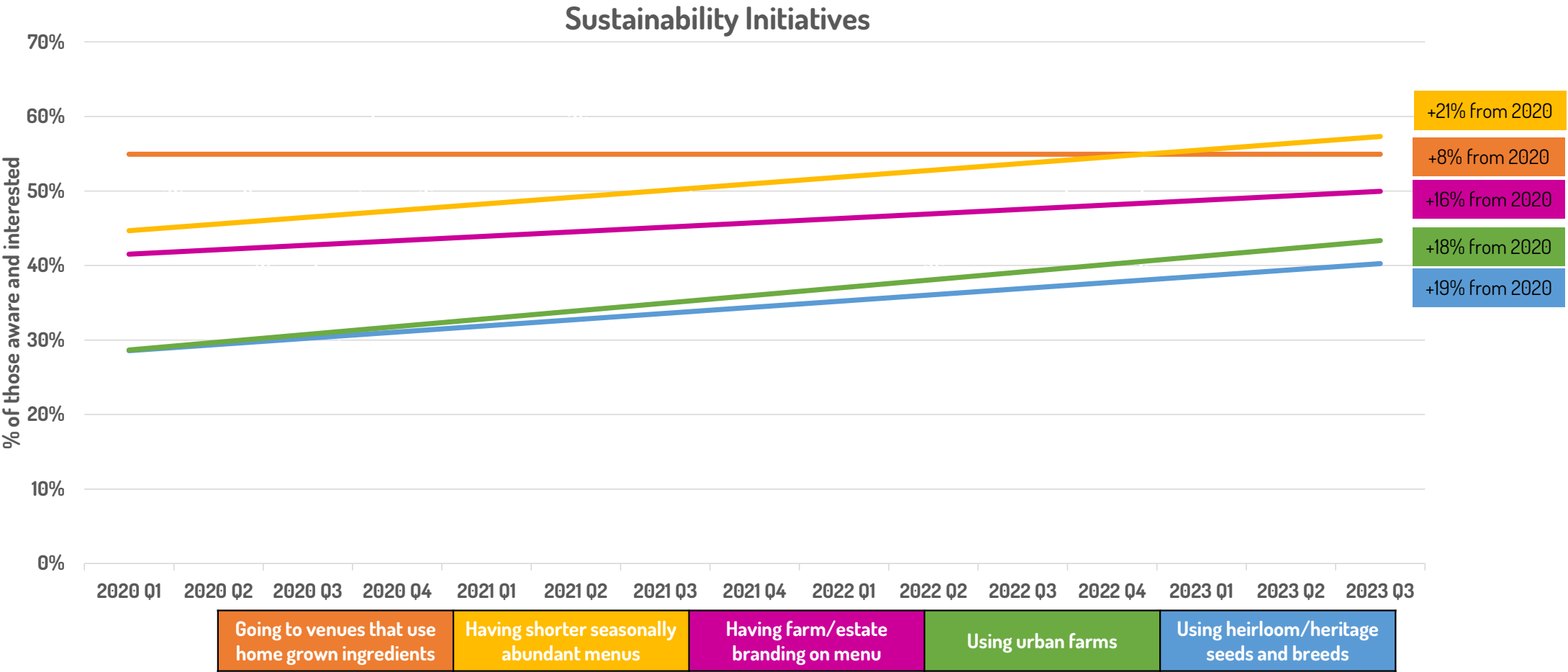


Despite the cost-of-living crisis sustainability remains important.

Importance factors when eating out/ordering from a food delivery service

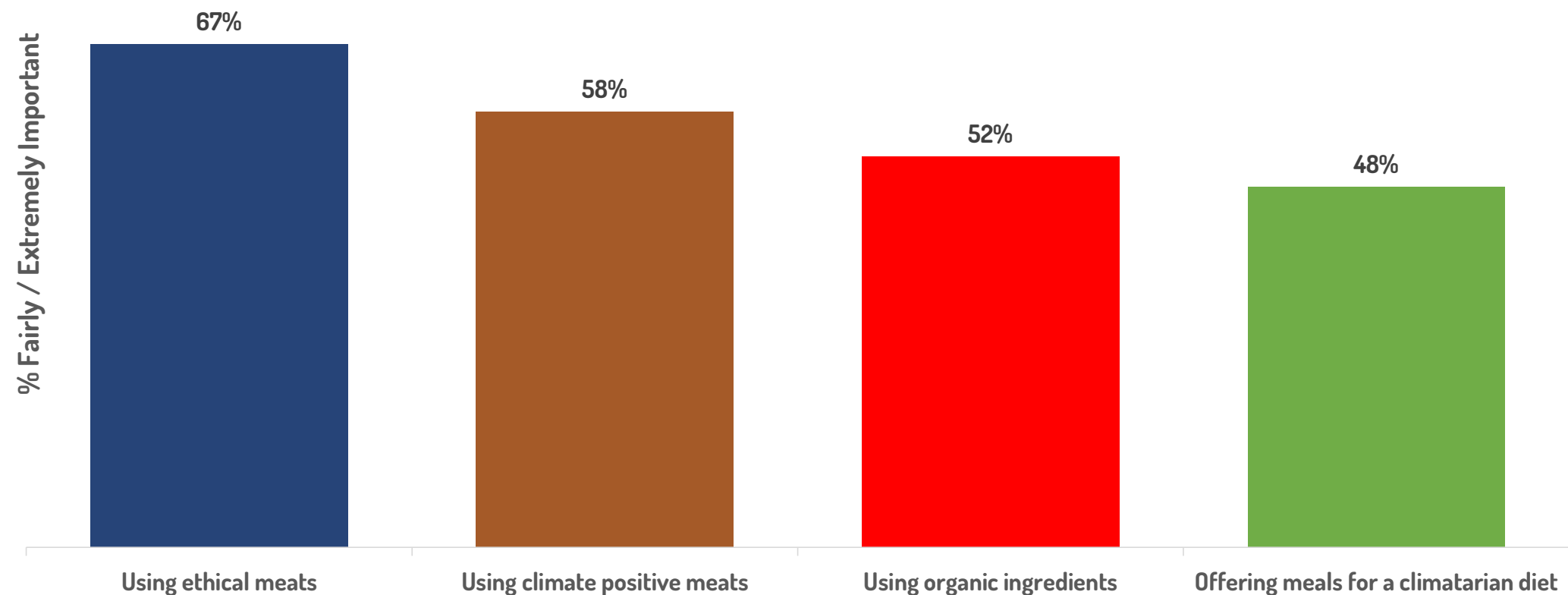


Amidst cost of living crisis, people value venues with local, seasonal, and traditional elements, showing a willingness to invest in perceived worth to show support for the UK economy.



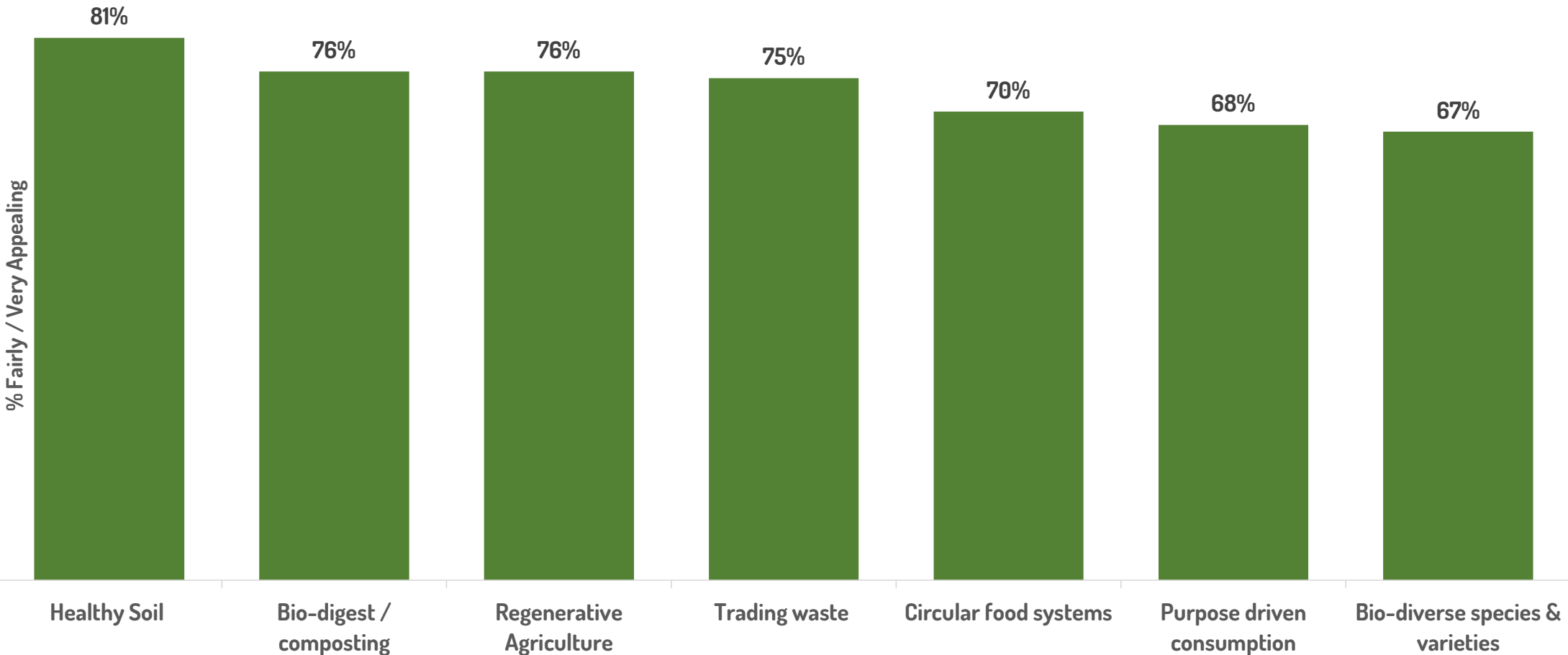
People understand terms 'ethical' and 'climate positive' more than 'climatarian'.

Importance factors when eating out/ordering from a food delivery service



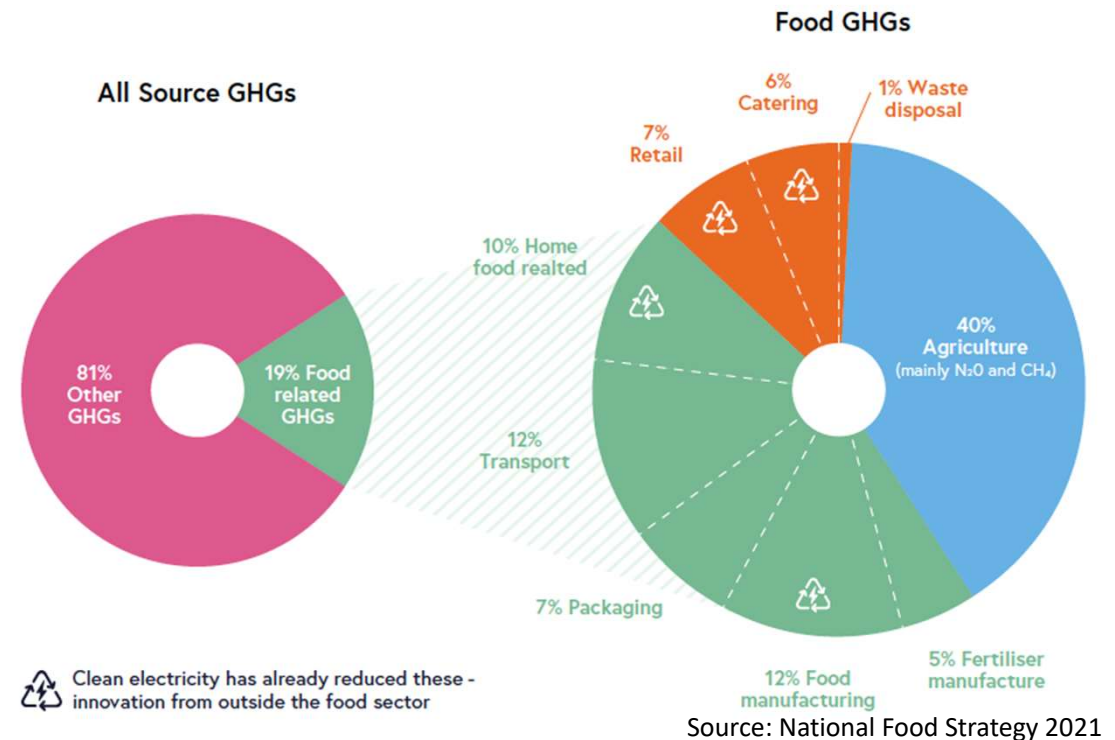
Sustainability initiatives can take a million different disguises and people find all appealing.

Appeal of Sustainability in the Hospitality Industry



Driving change when it come to the impact of our food system on the planet and us is critical

So now we're here, globally the food system is responsible for an estimated 20–30% of global greenhouse gas emissions. In the UK the food sector's emissions represent just under 20% of everything we produce, but that rises to close to the global average if you factor in the carbon from the imported food that we consume.



Driving change when it come to the impact of our food system on the planet and us is critical



Our food system has to perform a herculean task of reducing its impact on the planet and human health and hence the demand for disruptive technologies to accelerate progress against targets and satisfy consumers demand for healthier, ethical, environmentally positive food.

Nobody wants to harm the planet but there is a tension – for some can they afford to make the positive choice, but they can't afford not to!

- With external forces and cost of living there is a perception that making the right choice can be aspirational and not for today – government, policy, business and consumers alike
- But this is a forever trend, eventually policy will force change and create a level playing field but not any time soon
- If this is your positioning its key to communicate, make it real and relatable
- It's also important to de-bunk with facts, we can see that consumer are confused by what are often industry teams. Where there is a clear benefit its more understandable e.g. ethical meats
- We expect the trail blazers and influencers to continue to work hard on real, honest and trustworthy actions & communications

A few examples...

In an era of supply chain inconsistency and disruption, sourcing locally can offer a degree of certainty and an opportunity for innovation.

- With the challenges of covid and Brexit, many operators look to onshore supply chains and work with local producers for key hero ingredients such as meat, fish and vegetables but also drinks, condiments and dairy
- Chefs working in partnership with farms, farmers or even growing themselves
- Pre-funding crops that chefs specifically want to use and develop
- Food is about flavour – local is an opportunity to reduce the dwell between harvest and plate in produce
- Tech driving a re-definition of what local and seasonal means
- Diners want to feel good about their food choices – drive diner emotional connection and resonance that comes with knowing where your food comes from and who is involved in the production
- Local sourcing keeps local people employed and money in the local community



Increasingly chefs and operators are featuring hero seasonal ingredients on menus.

- Seasonality is featuring increasingly on menus, particularly in the independents but why?
- You get to cook with the very best that is naturally abundant – Tom Sellers
- An opportunity to allow menus to roll with the seasons, in harmony with nature
- Procuring seasonally when ingredients are abundant should drive a cost benefit and an opportunity to preserve for the future
- Chefs talk about relishing the creative challenge of seasonal cooking – hyper seasonality
- Opportunity for seasonal supply partnerships and events



Cooking and feeding in harmony with nature is becoming an increasingly large share of voice for trend setters – the buzz words of the last few years become concepts in their own right

- Closer links between farming and agriculture
- Sustainability has become a necessity – Michelin
- Regenerative sourcing that drives net ecological benefits, moves to on farm measurable benefits
- Dan Cox, Crocadon farm – a soil centric farm with a restaurant at its heart
- Focus on people and a sustainable balance between commercial, people and the environment
- Feed becomes key – soy free
- Taking time, slower growing for flavour
- Lower intervention and natural wines



Q3 2023 Key Insights

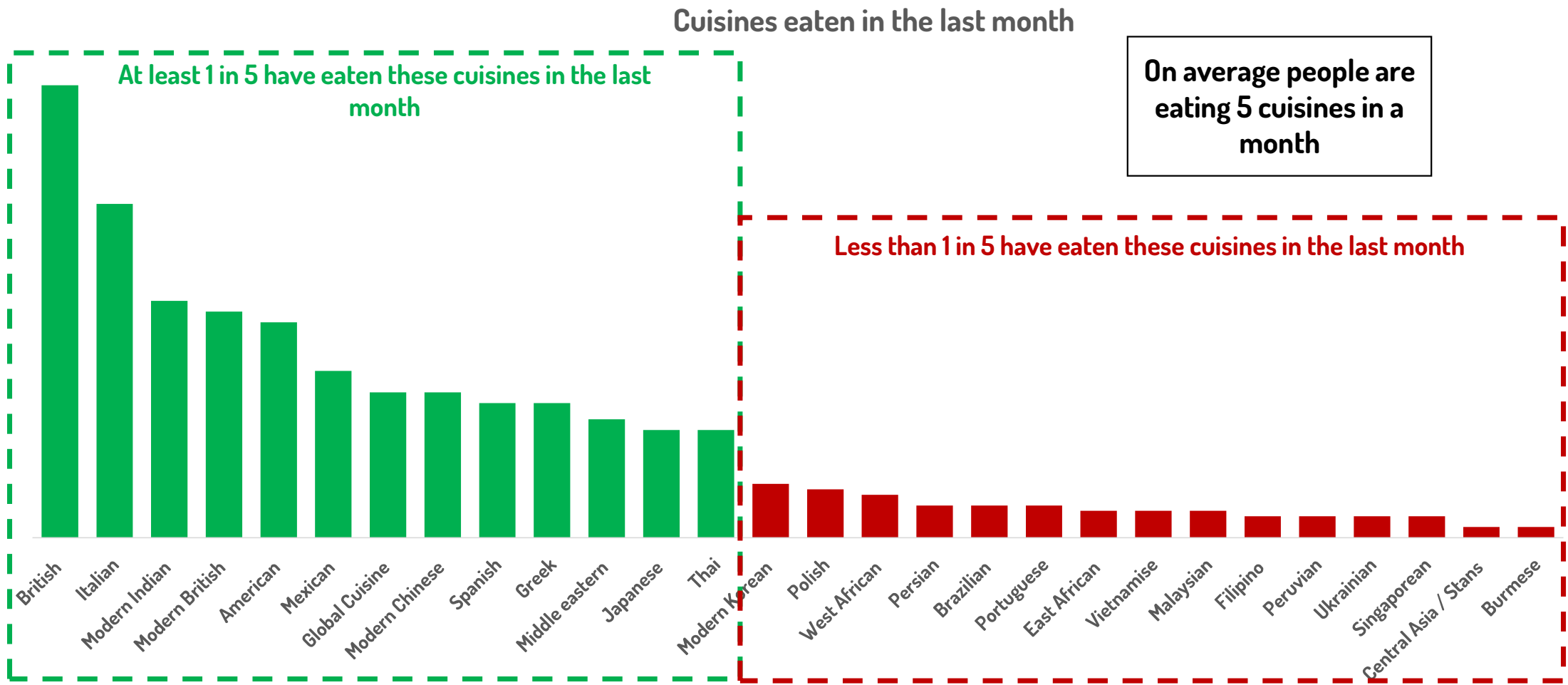


Curious consumers seek cuisine education

Consumers are interested despite lack of current eating frequency.

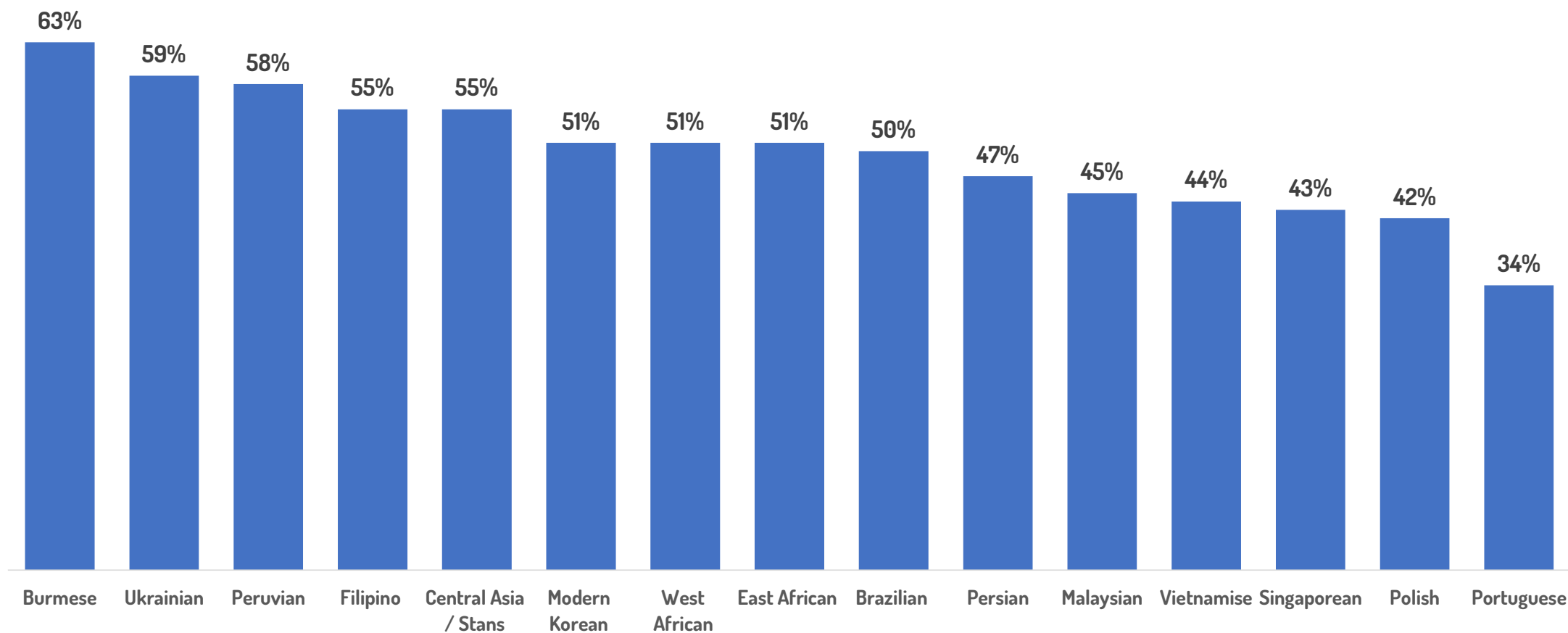
#Insight 5:

On average people are eating 5 cuisines per month with over half eating British and Italian food in the last month.



Whilst people aren't eating these currently, they have high interest for these cuisines.

Those unaware but interested



Familiarity can still be a platform for innovation



Empire Empire – Modern Indian



Dovetail – British Sourcing x Mediterranean



Manzi's – British Sourcing x Classic Seafood



Carlotta – Italian x Lux with a twist

- Familiar cuisines like British, Italian and Indian can be twisted up with other differentiators to create a new proposition but with relevance for today/tomorrow

Single-mindedly owning the un/lesser-known Cuisines



Mountain – fire cooked Spanish



Bao Mary – Taiwanese x contemporary twists



Little Kudu – South African x twisted regional



Bossa – Brazilian x British sourcing

- Opportunity in taking the first leader advantage in owning and sometimes re-inventing the lesser-known cuisines
- Often modernising whilst being true to the heritage but focusing on a specific dish type, regionality or cooking technique

Single-mindedly owning the un/lesser-known Cuisines



Story Cellar – Basque Mediterranean x rotisserie



Rambutan – Sri Lankan comfort



Llama Inn – Peruvian x small plates



Geode – Mediterranean x Asian

- Opportunity in taking the first leader advantage in owning and sometimes re-inventing the lesser-known cuisines
- Often modernising whilst being true to the heritage but focusing on a specific dish type, regionality or cooking technique

IN SUMMARY – KEY TAKEOUTS

1. The initial shock of the cost-of-living crisis has subsided, leading to a gradual restoration of consumer confidence in the economy.
2. Consumers understand the value of reducing wastage but seek more value when retailers and food service venues take the lead.
3. Consumers are embracing a diet of both meat and plant-based products but are getting off this fence in both directions, either mainly meat or plant based.
4. Brands have an opportunity to showcase less well-known cuisines as interest for these are high but awareness and education is low.

See these trends in situ..

Future Food Safari

- Join Charles Banks & Kelly Dowson for an inspiring and thought-provoking tour of the hottest food businesses in London, led by an expert safari lead.
- Understand how emerging trends are being interpreted by London's culinary movers and shakers.
- Get ahead of the game with newly emerging trends and breakthrough cuisines.
- Receive a copy of our safari guidebook with details of 'why its relevant' to you.



7 Locations



£850 pp



Team days
available





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find out more?



Want to receive a copy of the
presentation & sign up or
find out more?





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If you want to hear more about Future Foods and receive the trends report going forward, please sign up on the link below or contact Helen or Charles.

<https://mailchi.mp/thefoodpeople/futurefood>

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