

Breakfast Eating Habits - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.



"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.

BUY THIS
REPORT NOW

VISIT:
store.mintel.com

CALL:
EMEA
+44 (0) 20 7606 4533

Brazil
0800 095 9094

Americas
+1 (312) 943 5250

China
+86 (21) 6032 7300

APAC
+61 (0) 2 8284 8100

EMAIL:
reports@mintel.com

DID YOU KNOW?

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

Breakfast Eating Habits - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

Table of Contents

Overview

What you need to know
Products covered in this Report

Executive Summary

The market
Bread and baked goods lead by sales; breakfast biscuits and cereal/snack bars tipped for fastest growth
Health remains on the agenda
Bread dominates but meal replacement drinks see the biggest growth in NPD
Adspend holds steady in 2015, with Kellogg's taking the lead
The consumer
Breakfast eating is almost universal
Figure 1: Where people eat breakfast, by location, May 2016
Cereals and toast are most popular when at home; indulgent options when out of home
Figure 2: Breakfast items typically eaten at home and out of home, May 2016
Convenience is most important in breakfast choice
Figure 3: Factors influencing choice of breakfast foods, May 2016
Time pressures drive out-of-home occasions
Figure 4: Reasons for eating breakfast out of home, May 2016
Out-of-home options seen to improve, but still seen to be costly
Figure 5: Attitudes towards breakfast, May 2016
What we think

Issues and Insights

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

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

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Breakfast Eating Habits - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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

Figure 7: Index of quantity of food purchased for UK households (average per person per week), for selected breakfast foods, 1974-2014

Bacon and sausages suffer in 2015 following cancer link

Figure 8: UK retail value sales of processed meats, 2010-15

Market Drivers

Health remains on the agenda

Obesity levels continue to rise

Sugar content is a concern for flavoured cereals

Figure 9: Perceptions of selected breakfast foods, June 2015

A time-poor society creates opportunities for OTG formats

Catering to the older demographic

Launch Activity and Innovation

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

Figure 10: Share of new product launches in typical breakfast food markets, by sub-category, 2012-16*

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

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com

Breakfast Eating Habits - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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
Figure 11: Total above-the line, online display and direct mail advertising expenditure on selected breakfast foods^, 2012-16
Figure 12: Total above-the line, online display and direct mail advertising expenditure on selected breakfast foods^, by category, 2012-16
Kellogg's is the leading advertiser
Figure 13: Total above-the line, online display and direct mail advertising expenditure on breakfast foods, by top 10 advertisers, 2012-16 (sorted by 2015)
Looking to positive nutrition with Kellogg's Ancient Legends and Weetabix's Incredible Inside
Health and happiness is a feature for Special K and Activia
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...

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Breakfast Eating Habits - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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

Figure 19: Venues visited to buy breakfast, May 2016

Breakfast Foods Eaten At Home and Out of Home

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

Consumers' repertoire shows they have a desire for variety

Figure 21: Repertoire of types of breakfast foods eaten at home and out of home, May 2016

Factors Influencing Choice of Breakfast Foods

Convenience is most important in breakfast choice

Figure 22: Factors influencing choice of breakfast foods, May 2016

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+

Figure 23: Breakfast eating habits – CHAID – Tree output*, May 2016

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

BUY THIS
REPORT NOW

VISIT: store.mintel.com
CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094
Americas +1 (312) 943 5250 | China +86 (21) 6032 7300
APAC +61 (0) 2 8284 8100 |
EMAIL: reports@mintel.com

Breakfast Eating Habits - UK - July 2016

Report Price: £1750.00 | \$2834.04 | €2223.04

The above prices are correct at the time of publication, but are subject to change due to currency fluctuations.

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

Appendix – Data Sources, Abbreviations and Supporting Information

Abbreviations

Consumer research methodology

CHAID - Methodology

Figure 26: Breakfast eating habits – CHAID – Table output, May 2016

Forecast Methodology

Appendix – Market Drivers

Figure 27: Trends in the age structure of the UK population, 2011-21

Figure 28: UK households, by size, 2011-21

Appendix – Launch Activity and Innovation

Definition

Figure 29: New product launches in the UK breakfast food market, by the L/N/R sugar claim, 2012-16*

Figure 30: New product launches in the UK breakfast food market, by the high in protein claim, 2012-16*

Figure 31: New product launches in the UK breakfast food market, by the gluten-free claim, 2012-16*

Figure 32: New product launches in the UK breakfast food market, by the on-the-go claim, 2012-16*

Figure 33: New product launches in the UK breakfast food market, by the premium claim, 2012-16*

Appendix – Advertising and Marketing Activity

Figure 34: Total above-the line, online display and direct mail advertising expenditure on breakfast foods, by brand, 2015

BUY THIS
REPORT NOW

VISIT: store.mintel.com

CALL: EMEA +44 (0) 20 7606 4533 | Brazil 0800 095 9094

Americas +1 (312) 943 5250 | China +86 (21) 6032 7300

APAC +61 (0) 2 8284 8100 |

EMAIL: reports@mintel.com