

HELLOFRESH

Australia's Cooking Landscape

JANUARY 2017



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FORECASTS • STRATEGY • RESEARCH

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RESEARCH OBJECTIVES

In December 2016, HelloFresh commissioned McCrindle Research to conduct research into Australian weeknight cooking behaviours and decision-making processes. The aim of the research is to understand how Australians navigate the everyday stresses of deciding what to cook for dinner and ensuring weeknight dinners are healthy and appeal to the whole household.

This thought leadership report explores the average Australian household's decision-making, grocery shopping, cooking and eating behaviour when it comes to midweek meals.

RESEARCH METHODOLOGY

The *Australia's Cooking Landscape* report is the collation of quantitative data gained through a survey launched to a national panel of Australians who grocery shop (respondents who indicated they only grocery shopped rarely or never were screened out). The survey obtained 1,005 responses and respondents were nationally representative of gender, age (aged 18+) and state. The survey was in field from 23 January to 27 January 2017.

A NOTE ON THE GENERATIONS

Reference to the generations throughout this report refer to the following age categories:

- Generation Y: 23-37 year olds (those born from 1980-1994)
- Generation X: 38-52 year olds (those born from 1965-1979)
- Baby Boomers: 53-71 year olds (those born from 1946-1964)

THROUGHOUT THIS REPORT

Gender insights are provided in these breakout boxes.

Generational insights are provided in these breakout boxes.

Shopper insights are provided in these breakout boxes.

EXECUTIVE SUMMARY

The key insights from this research are summarised below, including key statistics that directly respond to the research objectives. The full results from the survey, including graphs, cross tabulations and analysis are included in the next section of this report.

Australians still value preparing homemade meals during the week.

Many Australians still have a desire to cook homemade meals on weeknights, with 97% suggesting they cook on weeknights. Almost three in four (74%) are likely to prepare five or more of their seven weekly dinners at home. Australians also value creating meals from scratch, with an average of three out of five midweek dinners (61%) likely to be prepared using fresh ingredients. Despite increasing busyness and the availability of alternative dinner options, Australians still choose to cook on weeknights because they want to keep household costs to a minimum (61%) and because they suggest homemade meals taste better (52%). While Australians already invest their time in to meal preparation during the week, almost nine in ten (87%) have a desire to be more adventurous in the kitchen.

Deciding what to cook for dinner is often stressful for home cooks.

Despite the value placed on preparing midweek dinners at home, the busyness of everyday life and growing expectations around home cooking often causes home cooks to feel overwhelmed when it comes to choosing what to cook for dinner. Three in five Australians (62%) find deciding what to cook for dinner at least slightly stressful, with catering to multiple food needs or preferences being the main stress factor for home cooks (35%). This stress can be heightened when individuals are time poor as 68% of Australians feel that they are often too busy to find recipes or meals that the whole family/household will enjoy. Younger generations are also more likely to feel stressed, with Gen Y the most likely generation to find deciding what to cook for dinner somewhat or very stressful (42% of Gen Y cf. 32% of Gen X and 18% of Baby Boomers).

Recipes seen in food media can be hard to translate into reality.

Although the prevalence of food media in contemporary culture is often framed as inspiration for home cooking, four out of five Australians (81%) feel that cooking shows and other food inspiration can create high expectations for home cooks. Australians are also reluctant to try new recipes they have seen in food media because the ingredients can often be expensive and they would not be likely to use the ingredients again (38%). More than two in three Australians (67%) also admit they make mistakes when cooking recipes.

Many Australians experience guilt and stress when it comes to cooking dinners during the week.

There is a disconnect between Australians' desire to cook wholesome, exciting and tasty weeknight meals and the reality of the average household's weekly dinners. This is likely due to the stress that many home cooks experience when cooking dinners during the week. More than half of Australians (54%) feel that throwing a dinner party or cooking for their family/household can sometimes be more stressful than going to work. Over a third of Australians (36%) feel guilty about not cooking enough healthy meals for their household's weeknight dinners and another 29% feel guilty about cooking the same meals week after week. 37% of Australians have disagreements

within their household over weeknight dinners and two in five (41%) Australians wish they had at least a few more meals together as a household.

DECIDING WHAT TO COOK

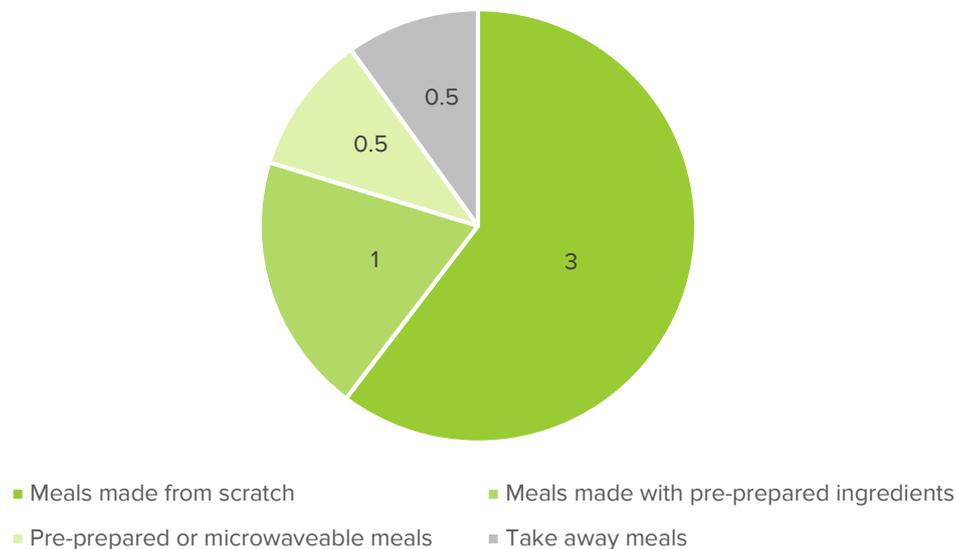
AUSTRALIA'S MIDWEEK MEALS

For the following question, Australians were asked to allocate their five weeknight meals to the following categories:

- Meals made from scratch
- Meals made with pre-pared ingredients
- Pre-prepared or microwaveable meals
- Takeaway meals

The data was then averaged and the following chart shows how many, out of the average Australian's five weeknight dinners, fit into each category (i.e. on average, 3 out of 5 (60%) weeknight meals are made from scratch).

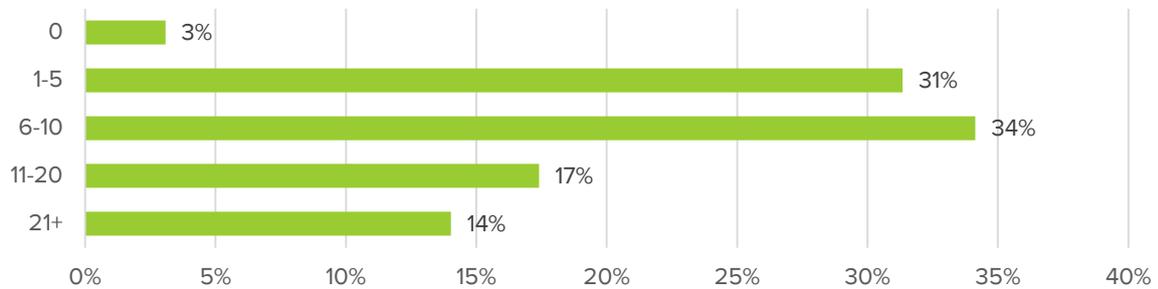
Q. How many of your 5 weeknight meals would fall into the following categories during an average week?



Australians tend to cook three out of their five mid-week meals from scratch, using raw meats, fruits and vegetables. One in five mid-week meals are likely to be made with pre-prepared ingredients and one in five are either a pre-prepared, microwaveable meal or a take away meal.

Australia's Cooking Landscape

Q. Approximately how many dinner recipes or meals do you have in your repertoire (meals that you frequently cook and know well)?



Two thirds of Australians (68%) have ten or less recipes in their repertoire. Only 14% would say they are confident cooking more than 20 different meals.

Gender insights

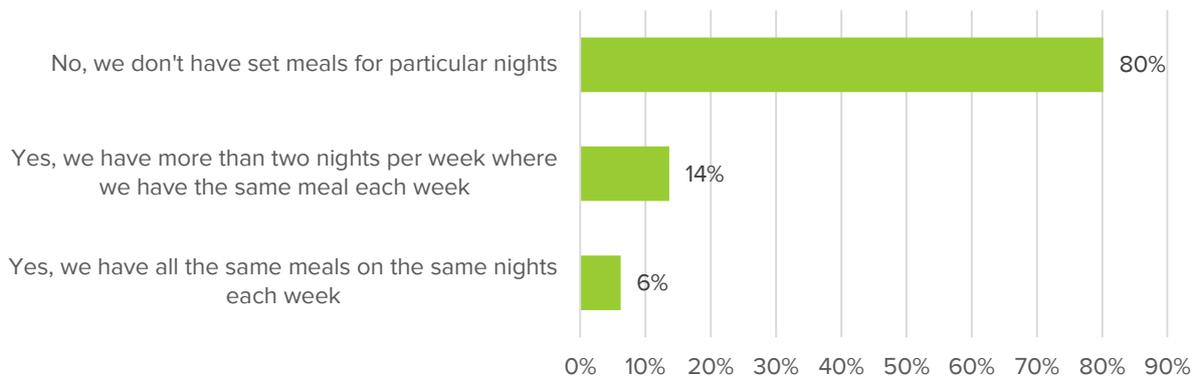
Males are more likely than females to only have 1-5 recipes in their repertoire (35% cf. 27% of females).

Generational insights

The older the generation, the more recipes they are likely to have in their repertoire.

	More than 10 recipes
Gen Y	25%
Gen X	34%
Baby Boomers	40%

Q. Do you have set meals that your household cooks on specific nights each week e.g. spaghetti Tuesday?



Most Australian households (80%) tend not to have set meals on specific nights each week, although one in five (20%) indicate they have set meals for some or all nights of the week.

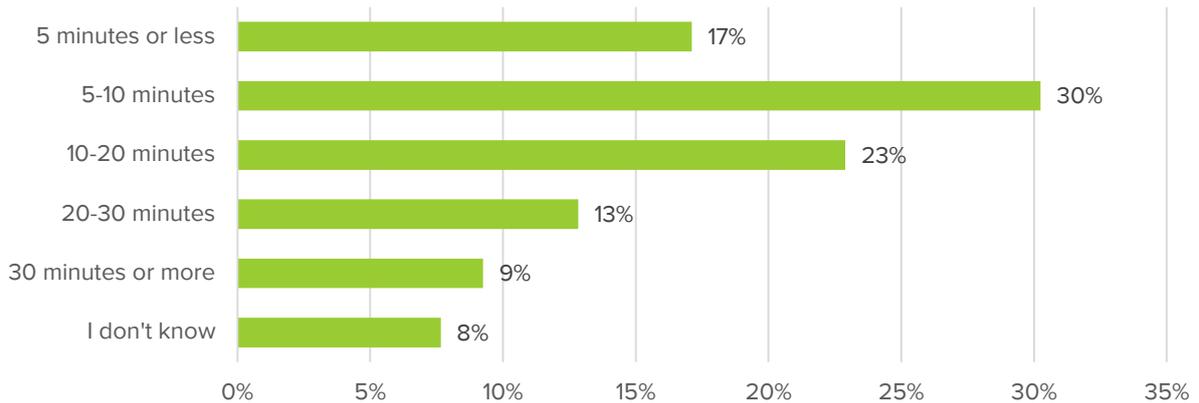
Generational insights

Gen Y are the most likely generation to have set meals for each night of the week (11% of Gen Y cf. 6% of Gen X and 4% of Baby Boomers).

COOKING INSPIRATION AND WEEKNIGHT DINNERS

Time spent deciding what to cook for weeknight dinners

Q. How much time per day would the main cook in your household spend deciding what to cook for dinner?



Australians are most likely to spend 5-10 minutes, each day, deciding what to cook for dinner. Almost half of Australians (45%), however, spend longer than this making the decision. Even if only five minutes was spent deciding, this would add up to 30 hours per year spent thinking about what to cook for dinner.

Generational insights

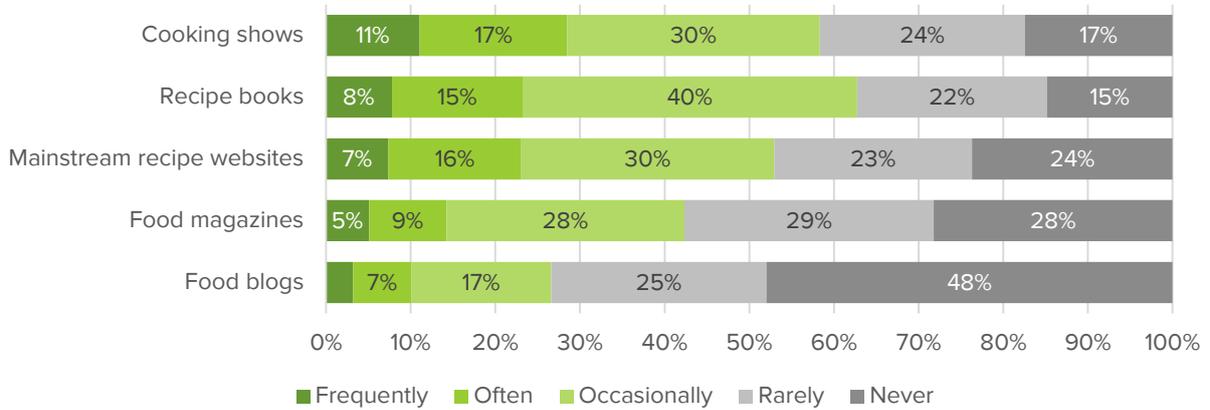
Baby Boomers are the most likely generation to spend five minutes or less per day thinking about what to cook for dinner. Other generations tend to spend longer.

Spend 5 minutes or less per day

Gen Y	12%
Gen X	11%
Baby Boomers	24%

Food media and inspiration

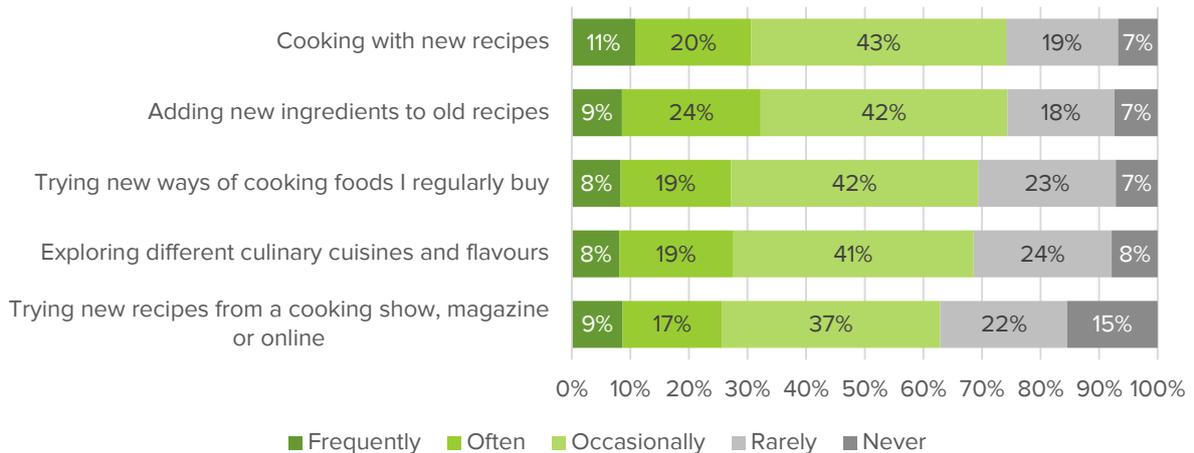
Q. How often do you read or watch the following types of food media?



Cooking shows are the food media most consumed by Australians. More than half of Australians (58%) suggest they watch cooking shows at least occasionally, and 63% of Australians consume recipe books and/or mainstream recipe websites at the same frequency.

Being adventurous in the kitchen

Q. Over the last 12 months, how often have you done the following when cooking at home?



Although cooking shows are the most consumed type of food media, Australians find it difficult to incorporate this inspiration into their home cooking, with 37% indicating they rarely or never try recipes from cooking shows or other food media.

Australia's Cooking Landscape

When it comes to being adventurous in the kitchen, Australians are most likely to try cooking with new recipes, with one in ten (11%) suggesting they frequently do this. On the other hand, however, approximately seven in ten Australians only try new things in their home cooking occasionally, rarely or never (new recipes 69%, new ingredients 67%, new cooking methods 72%, new cuisines and flavours 73%).

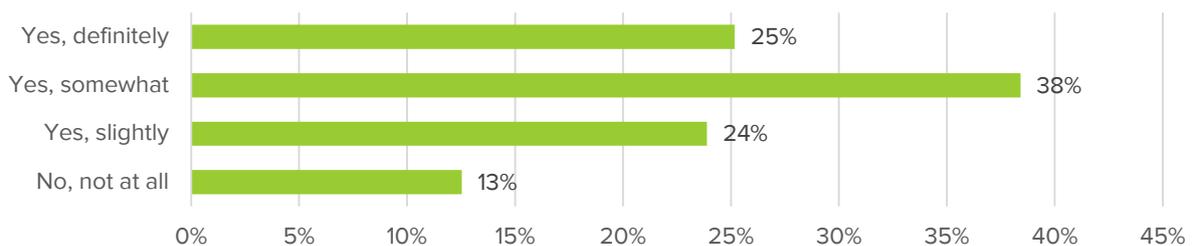
Generational insights

Younger generations tend to be more adventurous in the kitchen.

Percentage of each generation that frequently do the following when cooking at home

	Gen Y	Gen X	Baby Boomers
Cook with new recipes	15%	13%	6%
Explore different cuisines and flavours	15%	10%	4%
Add new ingredients to old recipes	14%	10%	4%
Try new ways of cooking foods they regularly buy	15%	11%	4%
Try new recipes from a cooking show, magazine or online	15%	10%	5%

Q. Do you want to be more adventurous in the kitchen - trying out more meal options and/or trying different cuisines?



Despite the fact that more than half of Australians only try new things occasionally, the majority (87%) have a desire to be more adventurous in the kitchen. Only 13% have no desire to be adventurous in the kitchen.

Shopper insights

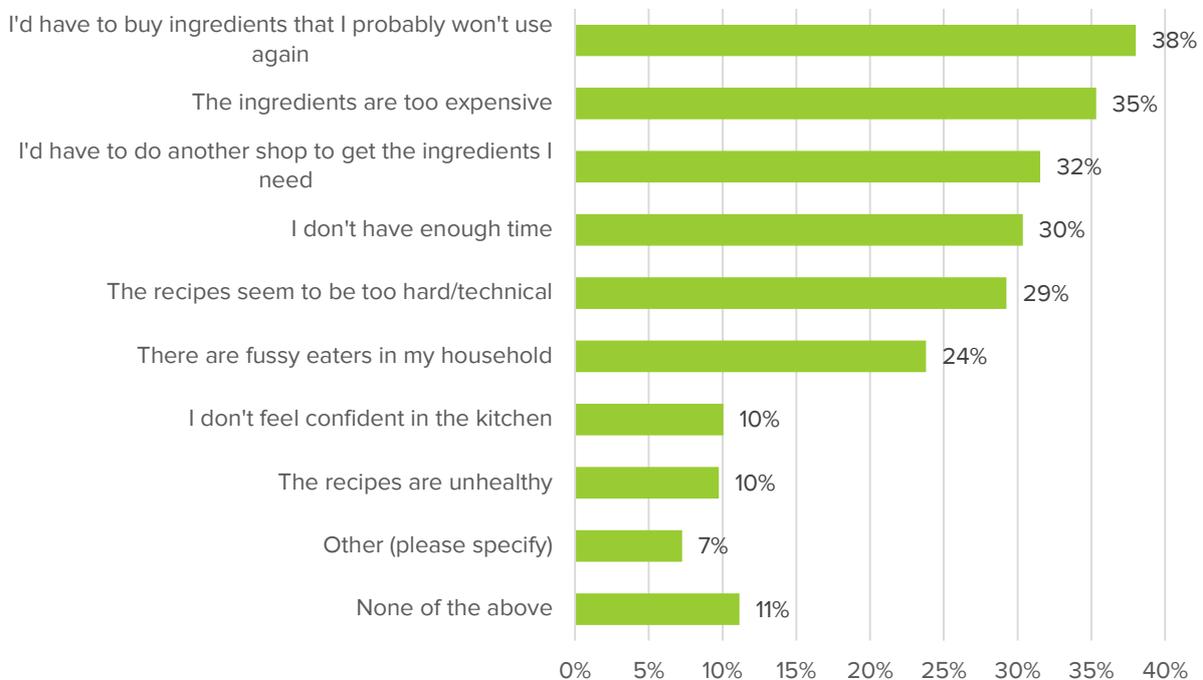
Individuals who do their grocery shopping more than twice a week or every day, are the most likely to want to be more adventurous in the kitchen, compared with those who do their shopping less frequently.

	Definitely want to be more adventurous
Shop once a week	18%
Shop at least twice a week	24%
Shop more than twice a week or everyday	36%

The difficulties of translating food inspiration into midweek meals

Q. What prevents you from cooking the recipes that you see in food media (i.e. cooking shows, magazines, online recipes) for weeknight dinners?

Please select all that apply.



The number one reason for Australians being reluctant to try the recipes they've seen in food media, is that they would have to buy ingredients they probably won't use again (38%). A third

Australia's Cooking Landscape

(35%) also suggest they choose not to cook these recipes because the ingredients are too expensive.

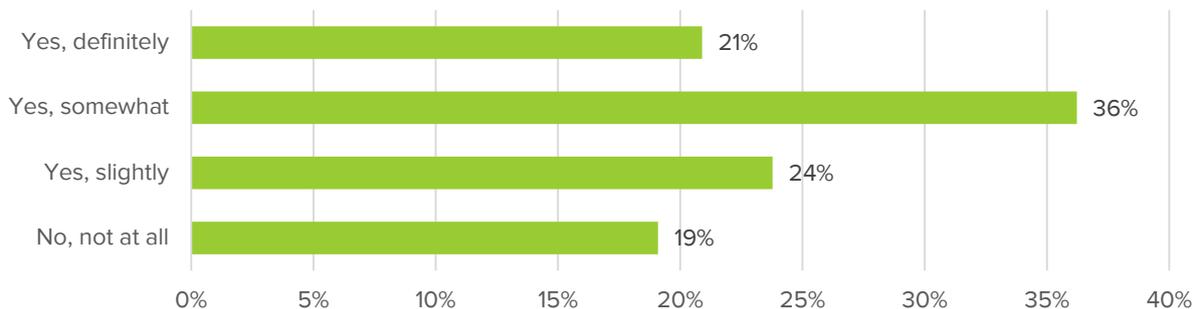
'Other' reasons for Australians tending not to cook recipes they have seen in food media include not having enough interest in trying the recipes, having to cater to allergies, and ingredients often being unavailable in local shops.

Generational insights

Different generations are reluctant to try recipes they have seen in food media for different reasons.

Top 3 reasons Australians do not cook recipes from food media		
Gen Y	Gen X	Baby Boomers
The ingredients are too expensive (38%)	I do not have enough time (37%)	I'd have to buy ingredients I probably won't use again (46%)
I do not have enough time (37%)	The ingredients are too expensive (34%)	I'd have to do another shop to get the ingredients I need (34%)
The recipes seem too hard/technical (34%)	I'd have to buy ingredients that I probably won't use again (31%)	The ingredients are too expensive (34%)

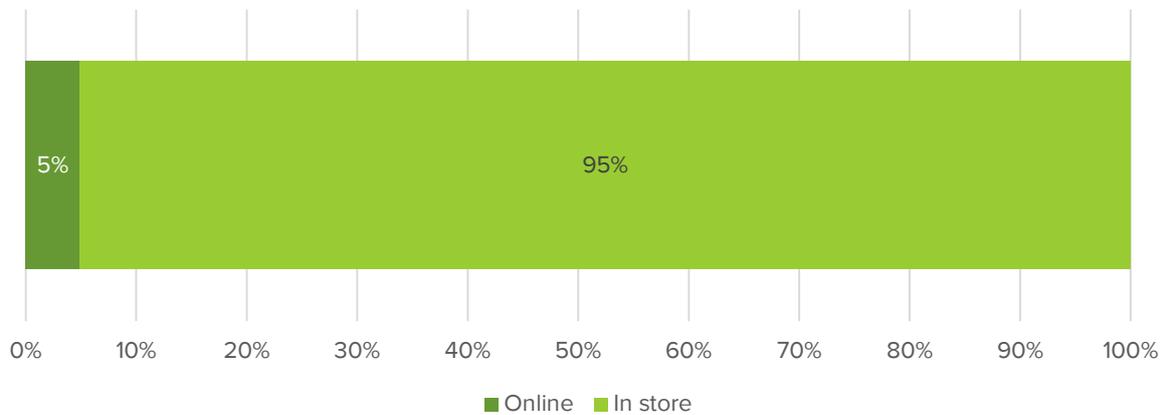
Q. Do you feel that cooking shows and other inspiration available can cause high expectations for home cooks?



Four out of five Australians (81%) feel that cooking shows and other food inspiration can create high expectations for home cooks and therefore puts more pressure on them in terms of their preparation of midweek dinners.

GROCERY SHOPPING

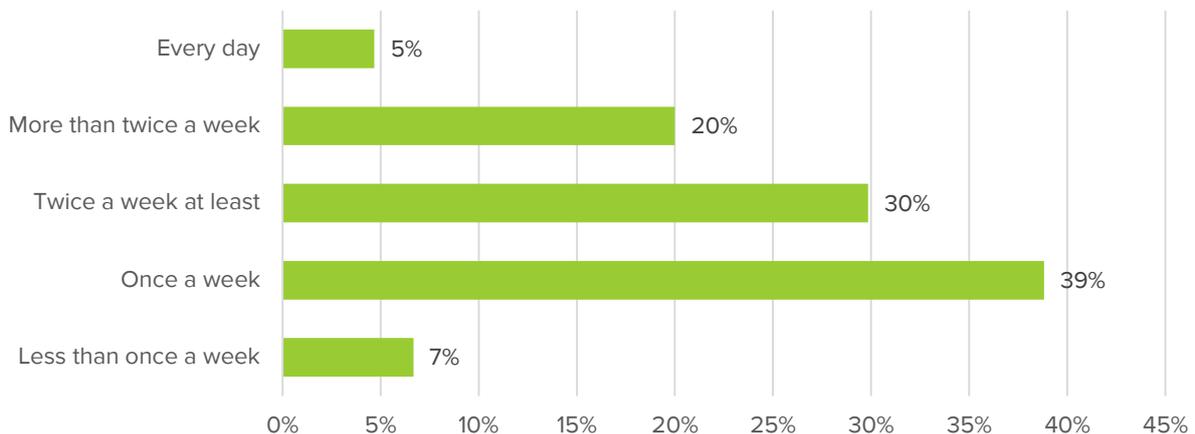
Q. How do you generally do your grocery shopping?



The majority of Australians still tend to do their grocery shopping in store, with only 5% doing their shopping online.

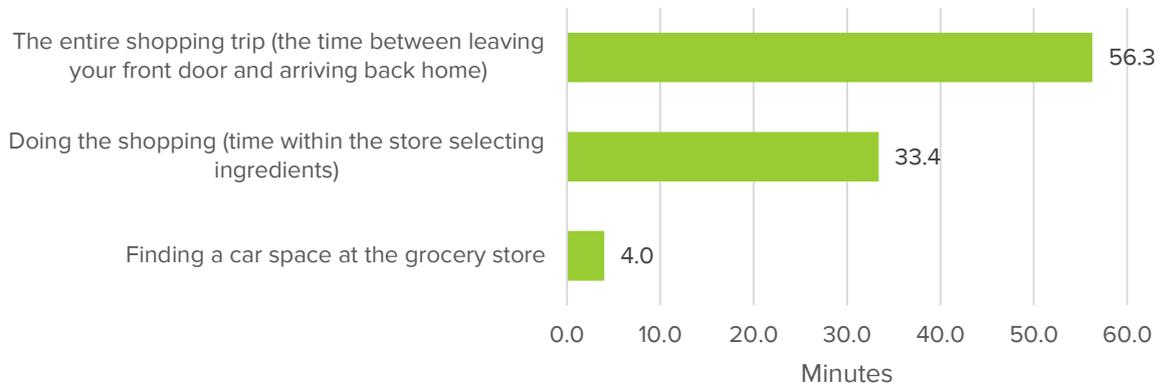
Time Australians spend grocery shopping

Q. How often do you shop for groceries or food?



It is common for Australians to do their shopping once a week, with two in five (39%) doing their groceries weekly. More than half (55%), however, do their shopping more frequently and 5% indicated they visit the grocery store every day.

Q. When grocery shopping, how long would you typically spend doing the following?
(Average number of minutes spent)



The graph above illustrates the average number of minutes Australians spend on various activities when doing their grocery shopping. Australians spend an average of 4 minutes finding a car space at the grocery store, 33 minutes in the store selecting ingredients and an average of 56 minutes on the entire trip, between leaving and returning home.

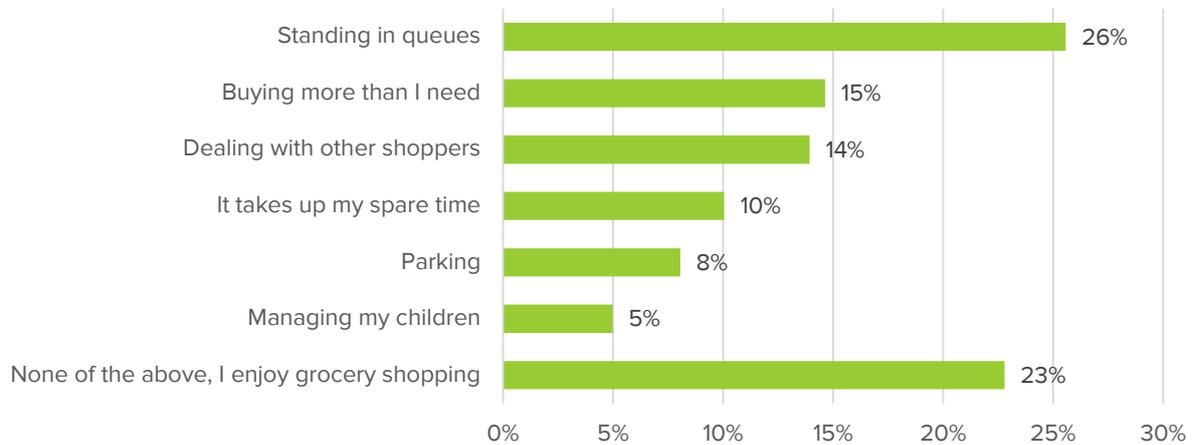
In the table below, the average time spent on each of these activities has been analysed according to how often respondents visit the grocery store. The average number of minutes has then been quantified to understand how many days per year, the average Australian spends doing each activity. Australians spend an average of 0.4 days per year looking for a parking spot at the grocery store, 3.3 days per year in the grocery store doing their shopping and 6.4 days on the entire shopping trip.

Average number of days per year spent doing the following:			
Frequency of visits to the grocery store	Finding a car space	Doing the shopping	The entire shopping trip
Everyday	1	7.5	13.8
More than twice a week*	0.4	4.3	9.5
Twice a week at least*	0.3	2.5	4.6
Once a week	0.1	1.2	2.3
Less than once a week	0.1	0.8	1.9
AVERAGE	0.4	3.3	6.4

*For the purpose of these calculations it was assumed that respondents who shopped 'more than twice a week' shopped three times per week, and respondents who shopped 'twice a week at least' shopped twice a week.

The worst thing about grocery shopping at the supermarket

Q. What is the worst thing about grocery shopping at a supermarket?



One in four Australians (26%) say that standing in queues is the worst thing about grocery shopping at the supermarket. Another 15% suggest the worst thing about shopping at the supermarket is that they often buy more than they need.

Gender insights

Males are more likely to dislike grocery shopping at the supermarket because of the queues (31% of males cf. 21% of females).

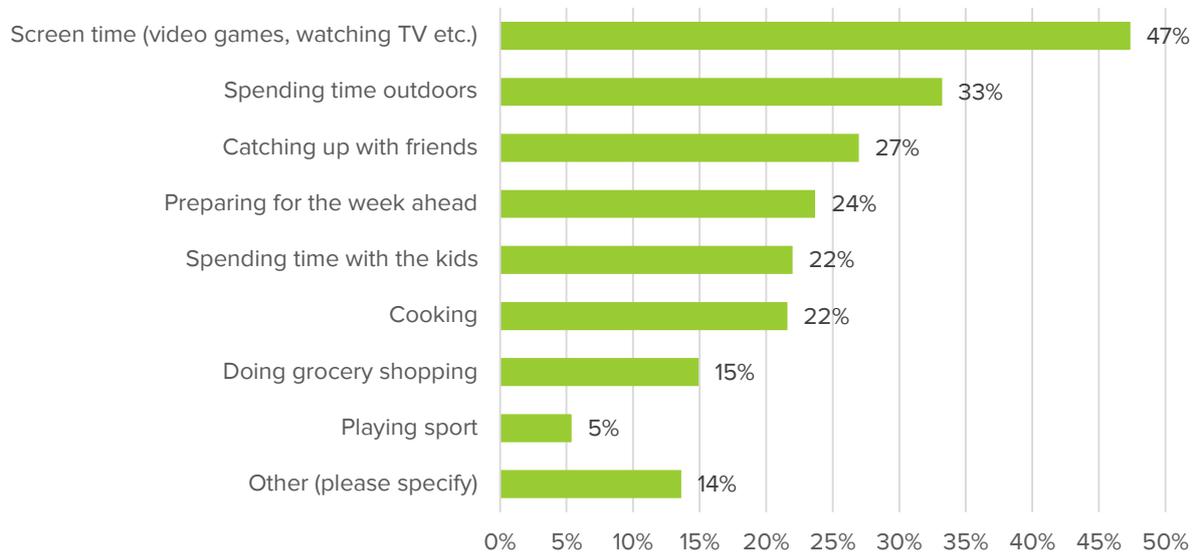
Generational insights

Gen Y are not as concerned with standing in queues as the other generations (13% of Gen Ys say this is the worst part of supermarket shopping compared to 24% of Gen X and 36% of Baby Boomers). Gen Y are more concerned about dealing with other shoppers (20% cf. 16% of Gen X and 10% of Baby Boomers) and buying more than they need (17% cf. 14% of Gen X and 13% of Baby Boomers).

Ways to spend a Sunday afternoon

Q. What does your typical Sunday afternoon look like?

Please select all that apply.

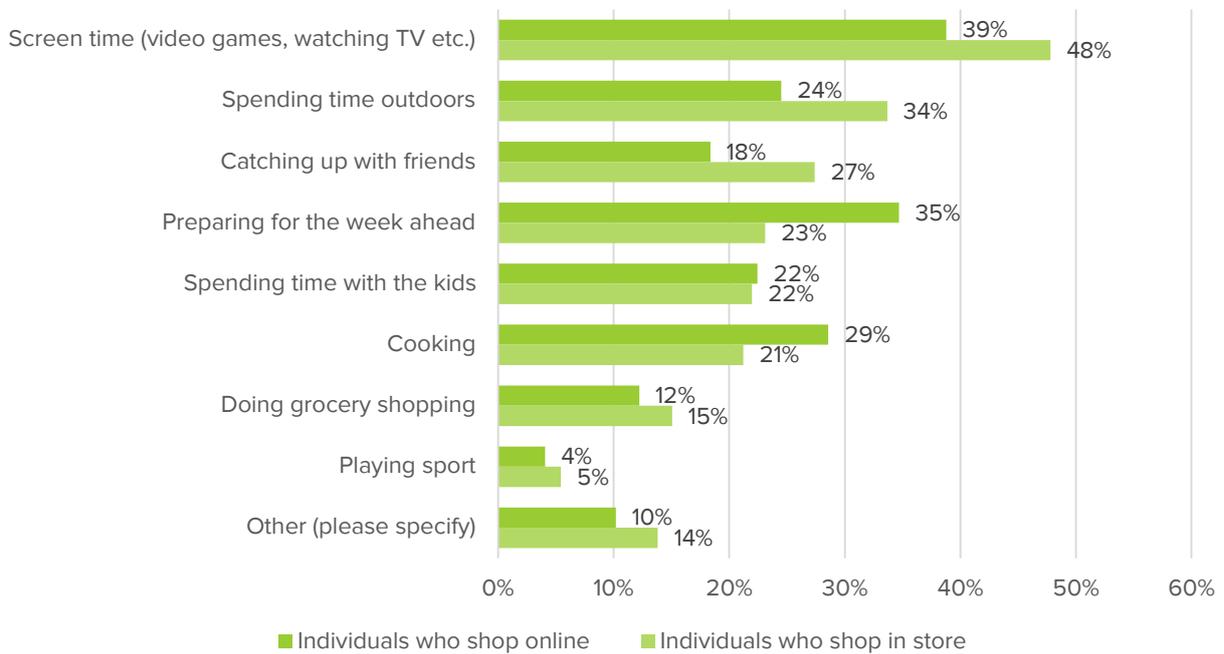


Although it is not the most common Sunday afternoon activity, 15% of Australians say they spend at least part of their Sunday afternoon grocery shopping. By far the most common Sunday afternoon activity involves time on a screen, whether it's watching movies, playing video games or spending time online.

'Other' Sunday afternoon activities included resting and relaxing, housework and gardening, reading, working and spending time with family (e.g. older relatives).

Q. What does your typical Sunday afternoon look like?

Please select all that apply. (n = 49, 956)*



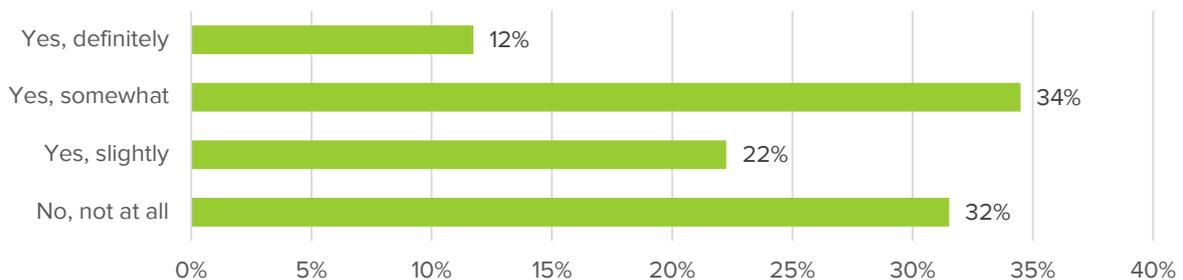
*Please note: the sample size for online shoppers is relatively small and caution should be used when making any conclusions

Sunday afternoon does not look particularly different for those who shop online, compared to those who shop in store. Online shoppers are, however, more likely to spend their Sunday afternoon preparing for the week ahead (35% cf. 23%) and/or cooking (29% cf. 21%). They are also 3 percentage points less likely to be doing their grocery shopping on a Sunday afternoon (12% cf. 15%).

THE CHALLENGES OF COOKING FOR A FAMILY/HOUSEHOLD

Busyness

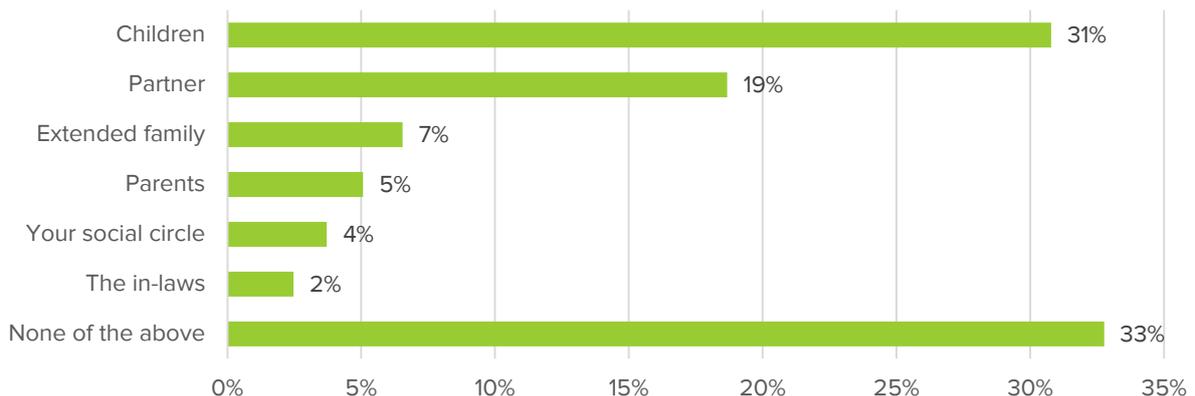
Q. Do you feel that you're often too busy to find recipes/meals that your whole family/household enjoy?



More than two in three Australians (68%) feel that they are often too busy to find recipes or meals that the whole family/household enjoy.

Cooking for children

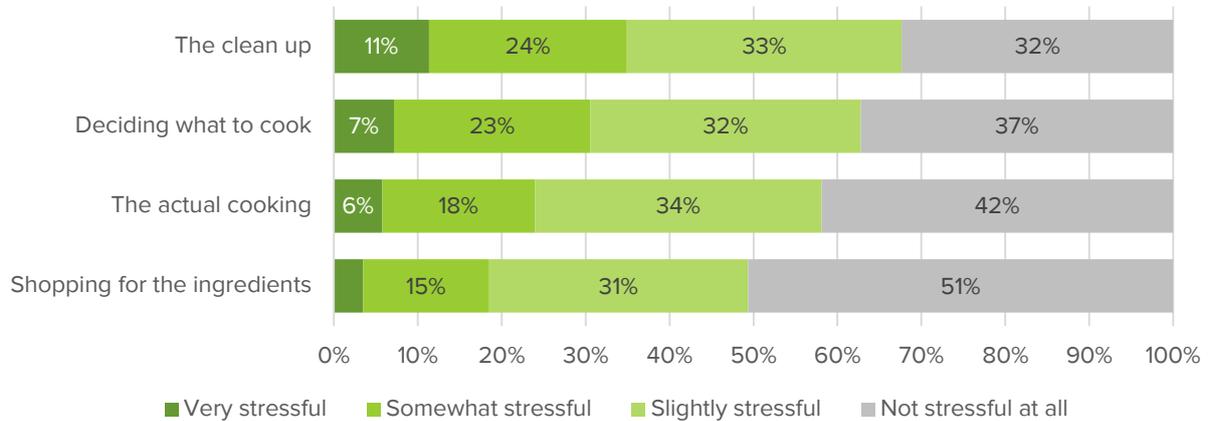
Q. Who are the most difficult people to cook for?



Just under a third of Australians (31%) suggest that children are the most difficult to cook for. Comparatively, over half of parents of dependent children (52%) suggest their children are the most difficult people to cook for.

STRESSFUL ASPECTS OF COOKING DINNER

Q. How stressful do you find the following aspects of cooking dinner?



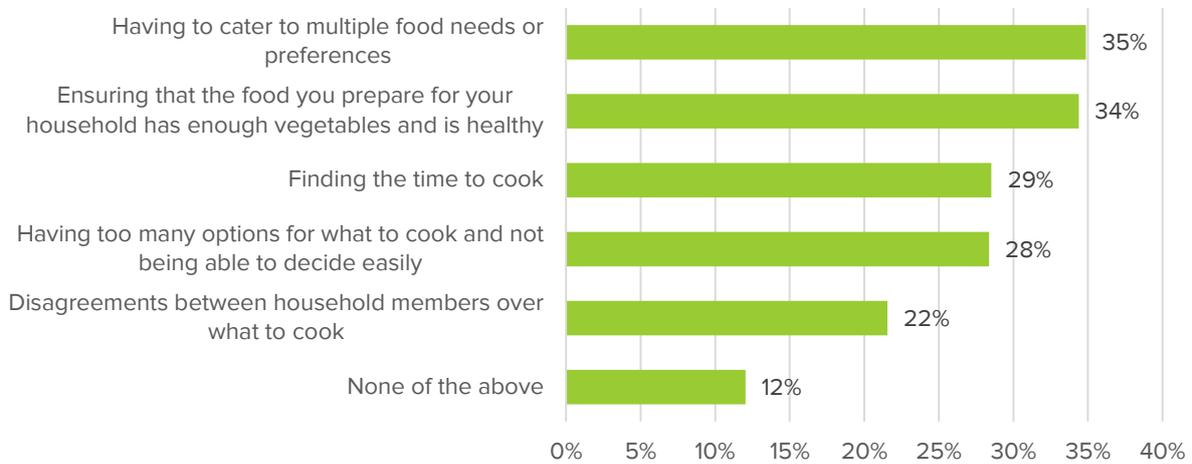
It is not necessarily the actual cooking that Australians find stressful when it comes to mid-week dinners. Deciding what to cook and the clean-up are considered to be more stressful than the actual cooking with approximately a third of Australians finding these two tasks somewhat or very stressful (30% and 35% respectively).

Generational insights

Gen Y are the most likely to find deciding what to cook for dinner somewhat or very stressful (42% of Gen Y cf. 32% of Gen X and 18% of Baby Boomers).

Q. Which of the following cause stress in deciding what to cook for your household?

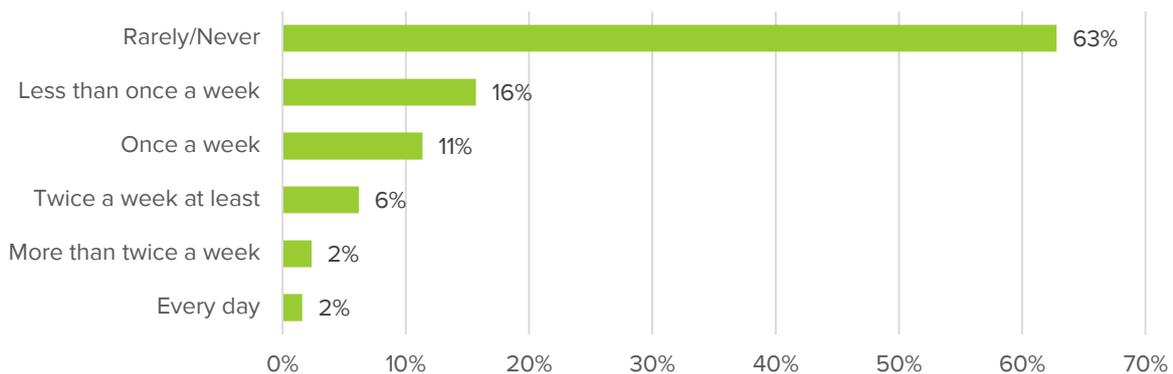
Please select all that apply. (n = 631)



For Australians who find deciding what to cook for dinner stressful, the most stressful aspect of the decision is having to cater to multiple food needs or preferences (35%). Australians also feel some pressure to make sure their meals are healthy and include enough vegetables (34%).

Midweek dinner disagreements

Q. How often do you argue with members of your household over weeknight dinners?



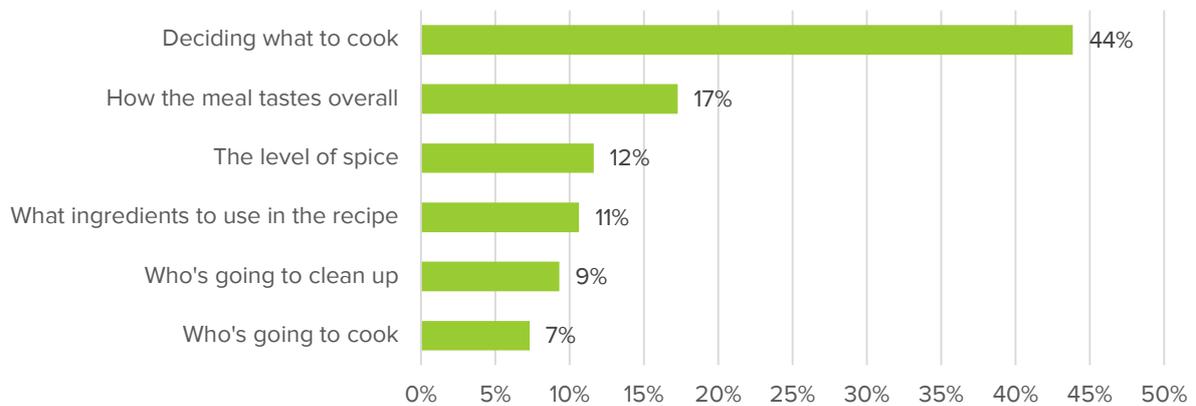
Just under two in five Australians (37%) have disagreements with their household over weeknight dinners. Half of the individuals (56%) who argue over weeknight dinners in their household, suggest that this happens once a week or more.

Generational insights

Baby Boomers are the least likely to argue over weeknight dinners, with 78% of Baby Boomers suggesting they never or rarely argue with members of their household, compared to 51% of Gen X and 43% of Gen Y.

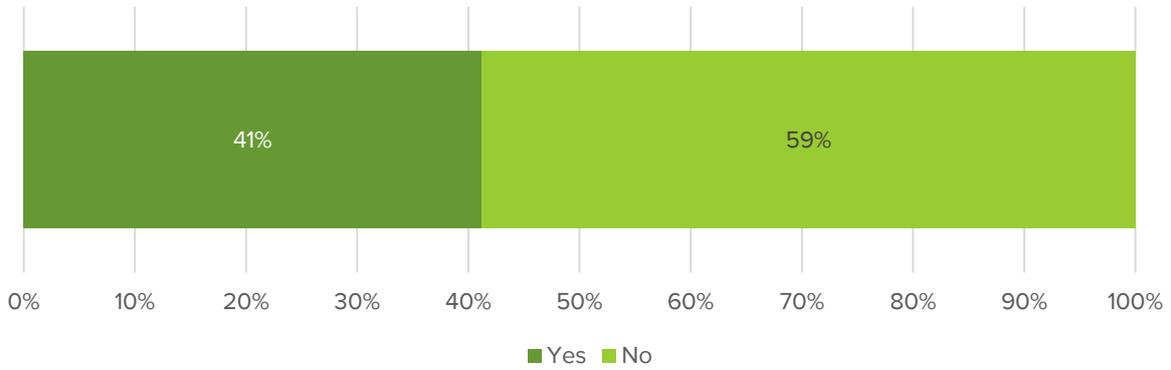
The following question was asked of respondents who indicated that they argue with their household less than once a week or more about weeknight dinners.

Q. What is the most common disagreement within your household about weeknight dinners? (n = 301)



By far the most common household disagreement about weeknight dinners is deciding what to cook (44%).

Q. Do you argue more with members of your household about what to cook for dinner than what to watch on TV or Netflix? (n = 301)

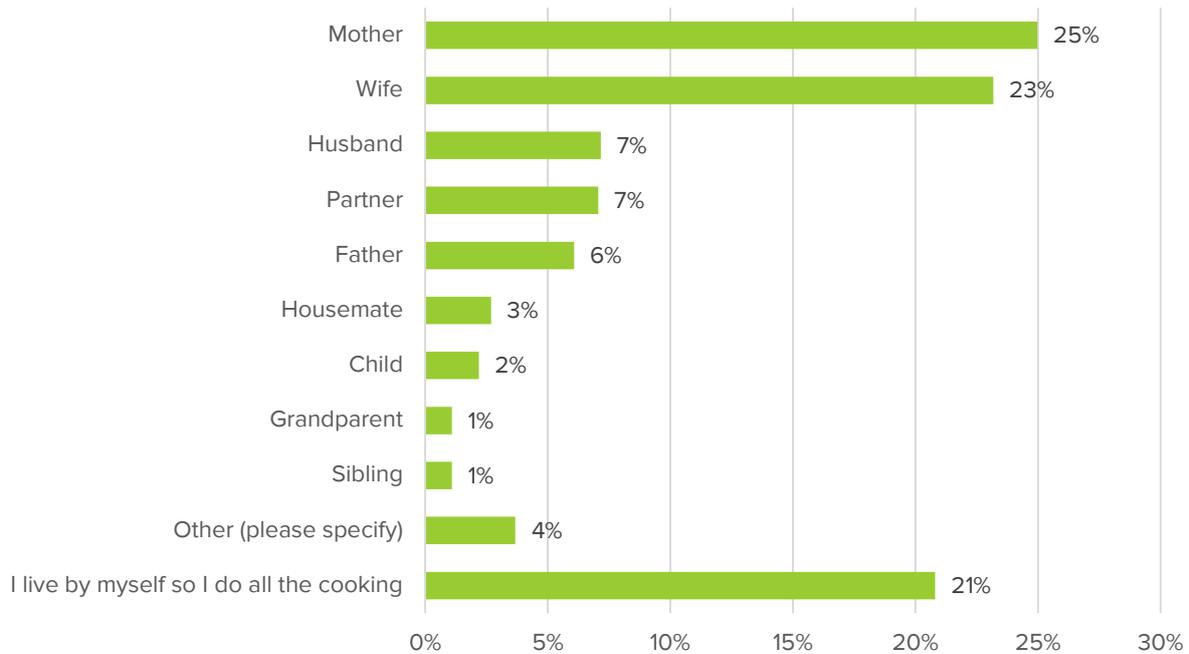


Of those who often disagree with their household members over weeknight dinners, two in five (41%) argue more with their household over what to cook for dinner than what to watch on TV or Netflix.

COOKING DINNER

The main cook in the household

Q. Who cooks the most in your household?

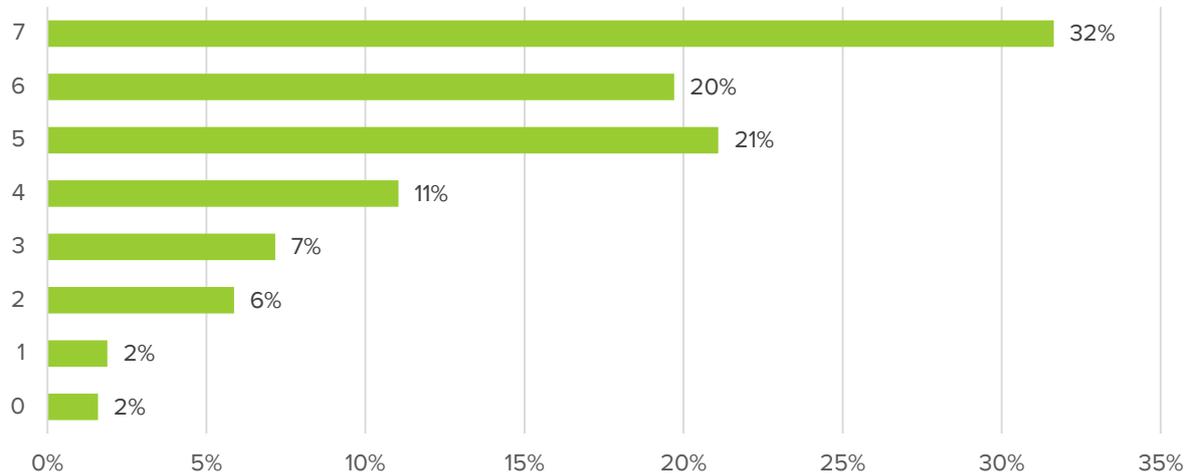


The gender split in terms of cooking in the Australian household, leans quite strongly towards females. In almost half of Australian households (48%) the mother or the wife are the main cooks in the household.

'Other' respondents suggested that the cooking within the household was shared equally, usually between two people. Friends, extended family and carers were also mentioned as the main cooks for some households.

Proportion of dinners cooked at home

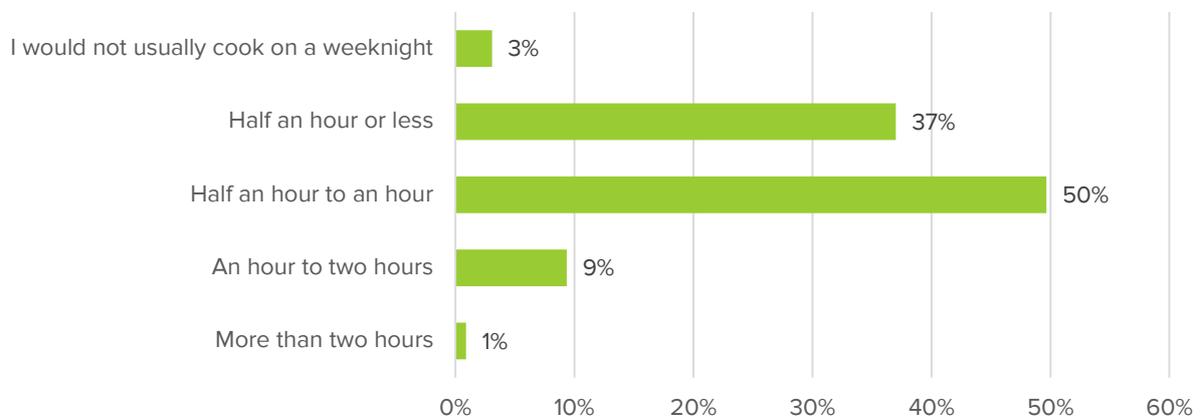
Q. Over the last 7 days, how many dinners were cooked or prepared at home by you or a member of your household?



Australians are still relatively likely to cook dinner at home most nights of the week, with a third (32%) suggesting they cooked all seven meals in the last week at home. Over a quarter (28%), however, are likely to cook four or less meals at home in a given week.

Time spent cooking on a weeknight

Q. On an average weeknight, how much time would you, or the main cook in your household, usually spend preparing dinner?

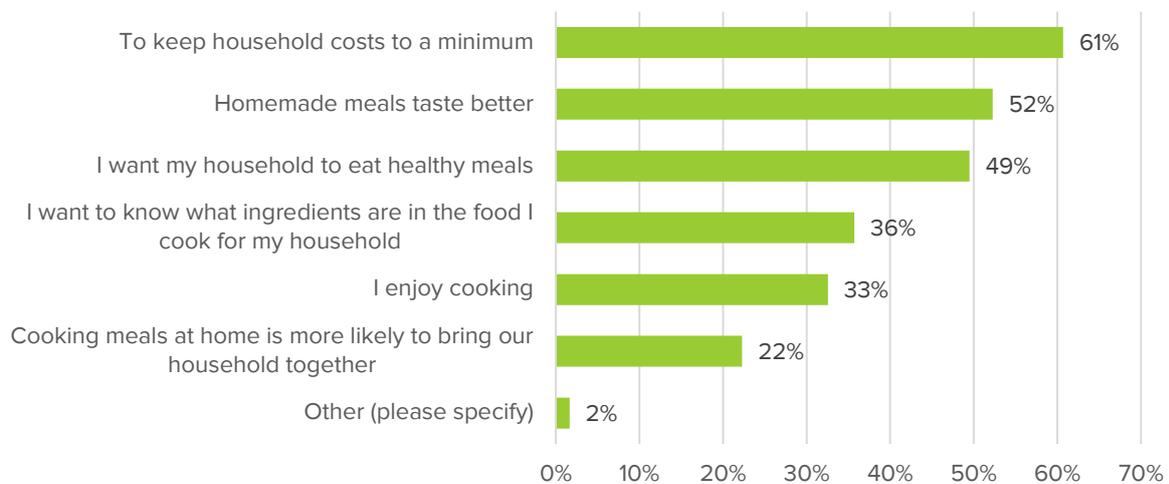


Only one in ten Australians (10%) would spend longer than an hour cooking dinner on an average weeknight. It is far more likely that an individual would spend half an hour to an hour (50%) or half an hour or less (37%) cooking a weeknight meal. Only 3% would not usually cook on a weeknight.

Why Australians choose to cook on weeknights

Q. What would you say are the main reasons your household chooses to cook on weeknights?

Please select all that apply. (n = 974)



Many Australians (97%) choose to cook during the week, despite being busy and time poor. This is because Australians would prefer to keep household costs to a minimum (61%) and because they prefer the taste of a homemade meal (52%). Just under half of Australians (49%) cook on weeknights to ensure their household eats healthy meals.

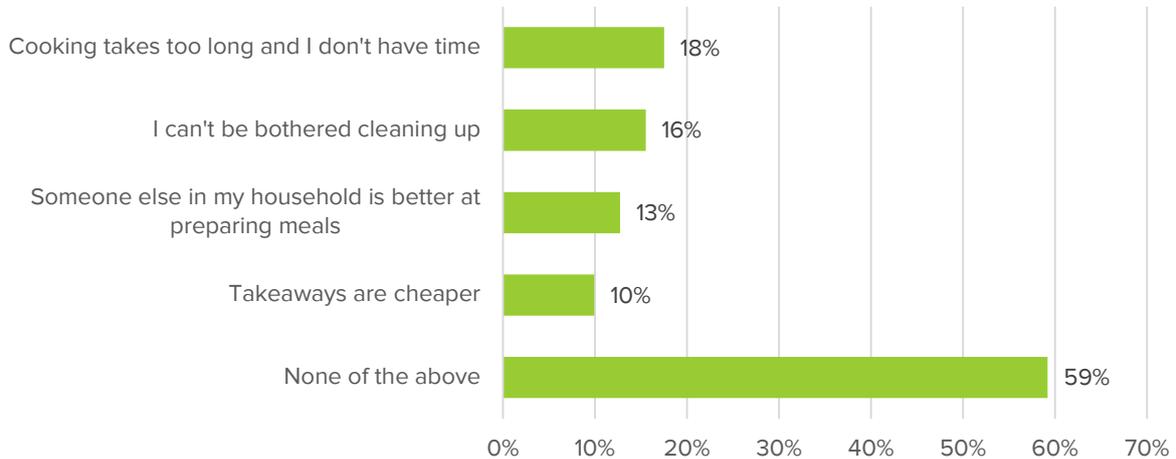
'Other' reasons for Australians choosing to cook on weeknights include living too far away to buy take away meals on weeknights, and having to meet particular dietary requirements which is difficult to do when buying takeaway meals. Variety was also mentioned as a reason for cooking on weeknights.

Gender insights

Females are more likely than males to choose to cook on a weeknight because they want to know which ingredients are going into the food they cook for their household (42% of females cf. 30% of males).

Excuses for not cooking on a weeknight

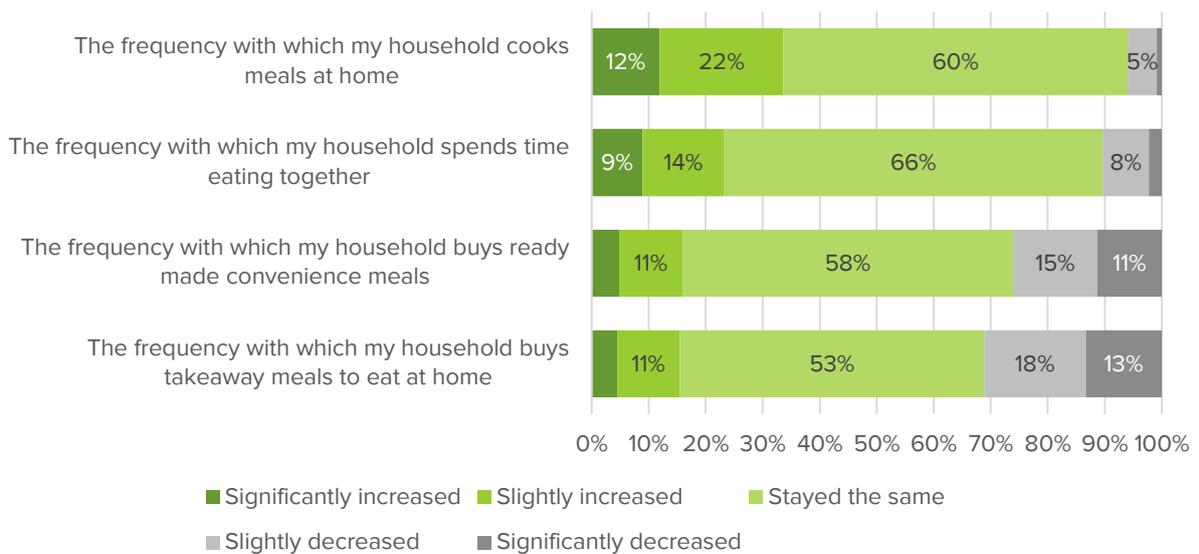
Q. Do you tend to use any of the following excuses to get out of preparing weeknight dinners?



The most commonly used excuse to get out of preparing weeknight dinners is 'cooking takes too long and I don't have time' (18%).

Changing weeknight dinner habits

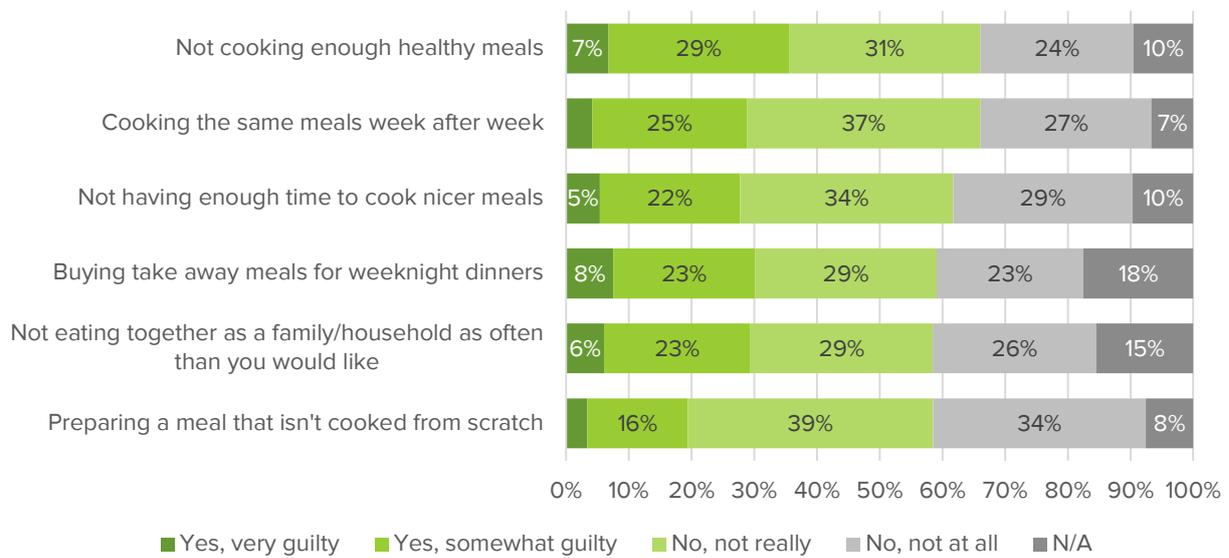
Q. In the last 2 years, how have the following weeknight dinner habits changed for you?



Over the last two years, the frequency with which households are cooking meals at home has slightly or significantly increased for 34% of households. In addition, the frequency with which households are spending time eating together has slightly or significantly increased for 23% of households.

Guilt around weeknight dinner preparation

Q. Do any of the following ever make you feel guilty about your household's weeknight dinner preparation?



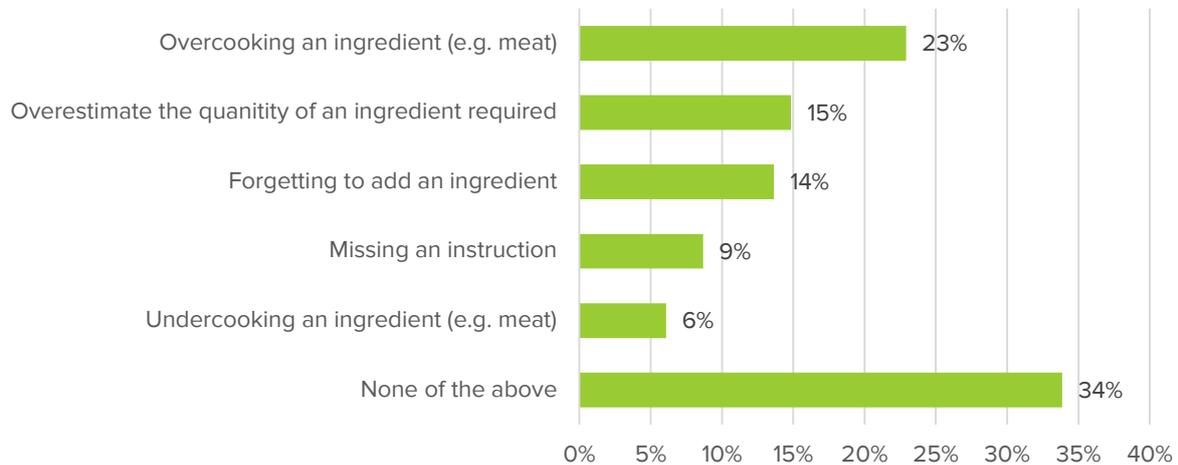
Over a third of Australians (36%) feel guilty about not cooking enough healthy meals for their household's weeknight dinners. Another 29% feel guilty about cooking the same meals week after week.

Generational insights

Gen Ys are the most likely to feel somewhat or very guilty about buying takeaway meals for weeknight dinners (46% of Gen Y cf. 32% of Gen X cf. 19% of Baby Boomers). They are also the most likely to feel guilty for not cooking enough healthy meals (51% of Gen Y cf. 40% of Gen X and 20% of Baby Boomers).

Recipe mistakes

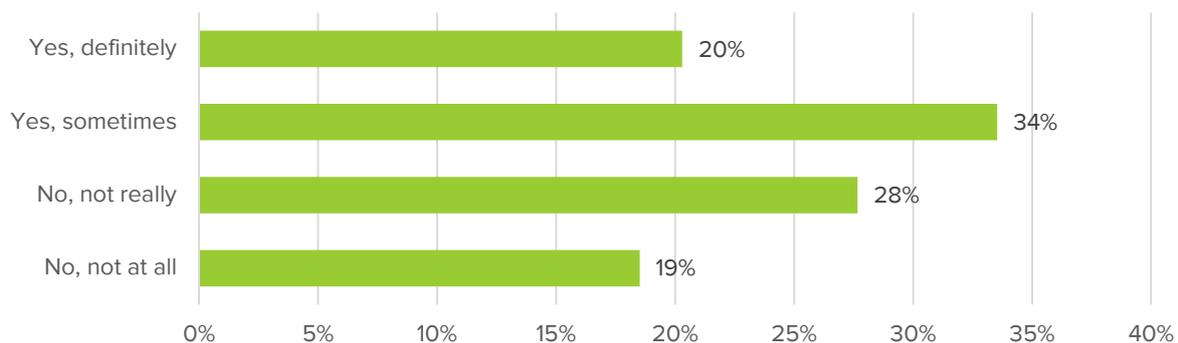
Q. What are the most common mistakes you make when cooking a recipe?



More than two in three Australians (67%) admit they make mistakes when cooking a recipe. Almost one in five (23%) suggest their most common mistake is overcooking an ingredient, such as meat.

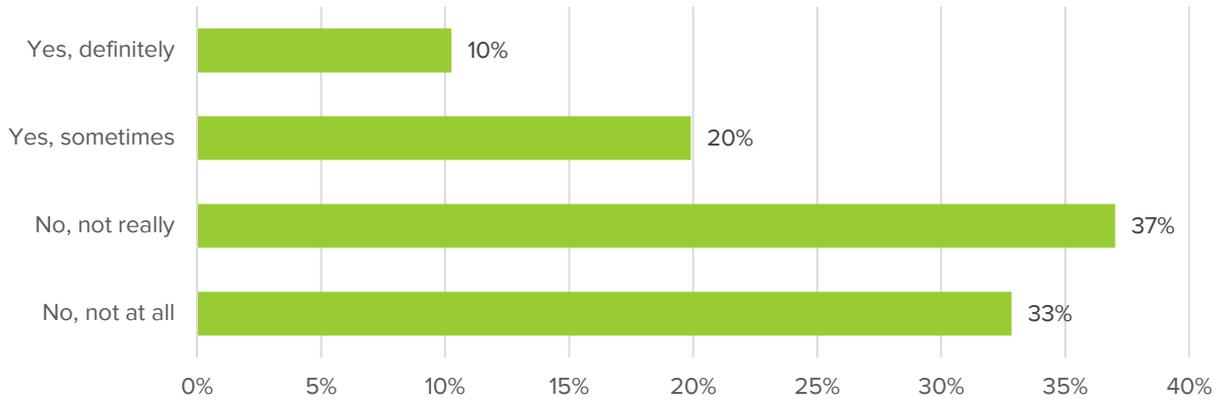
Cooking can be more stressful than going to work or doing household chores

Q. Do you ever feel that throwing a dinner party or cooking for your family/household is more stressful than going to work?



More than half of Australians (54%) feel that throwing a dinner party or cooking for their family/household is always or sometimes more stressful than going to work.

Q. Do you ever feel that you would rather do household chores, such as cleaning the bathroom, than cook for your household?

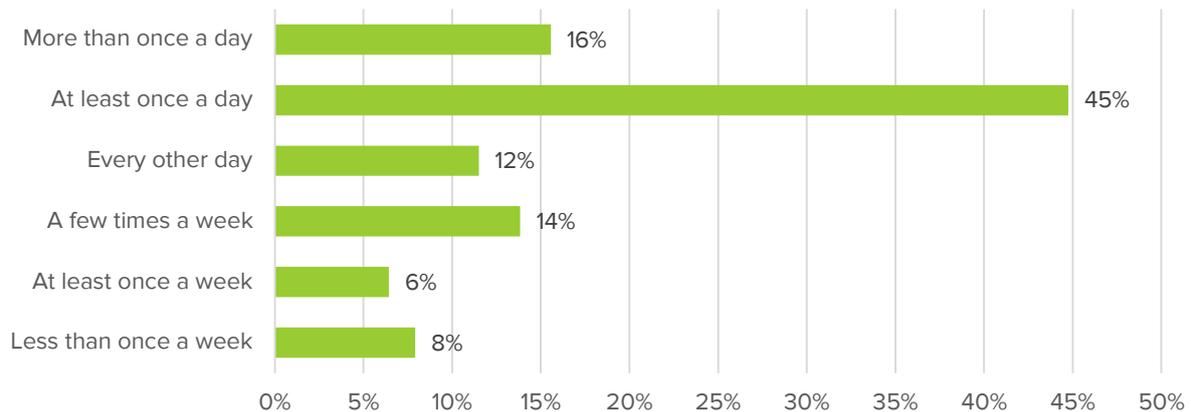


Three in ten Australians (30%) would rather do household chores, such as cleaning the bathroom, than cook for their household.

EATING TOGETHER

Sitting down and eating together as a family/household

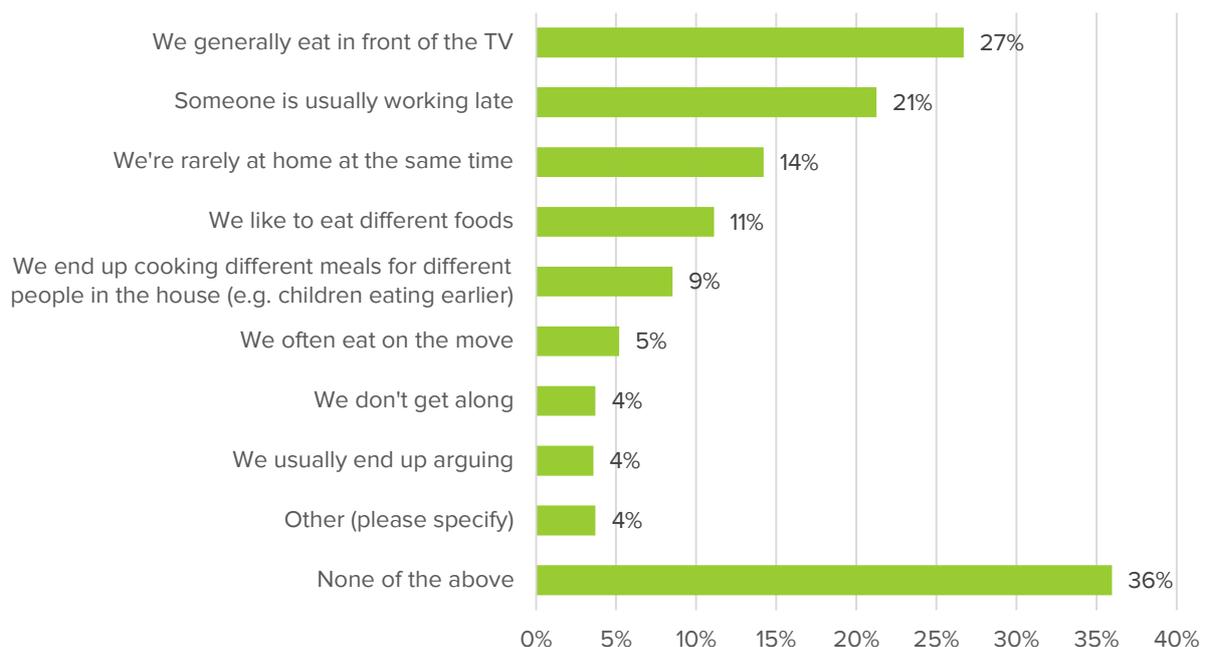
Q. How often do you sit down to eat a meal with your whole family/household?



Two in five Australians (40%) eat together as a family/household less than once a day.

Q. In your household, what gets in the way of you sitting down and eating together?

Please select all that apply.



Eating in front of the TV is the biggest impediment to families and households sitting down and eating a meal together, with 27% of Australians indicating TV gets in the way of eating together.

Other reasons for families and households finding it difficult to sit down and eat together include technological interruptions (e.g. phone ringing), not having the right furniture (i.e. no dining table), and household members preferring to eat in separate rooms or at separate times.

Q. Do you wish that your family/household had more meals together?

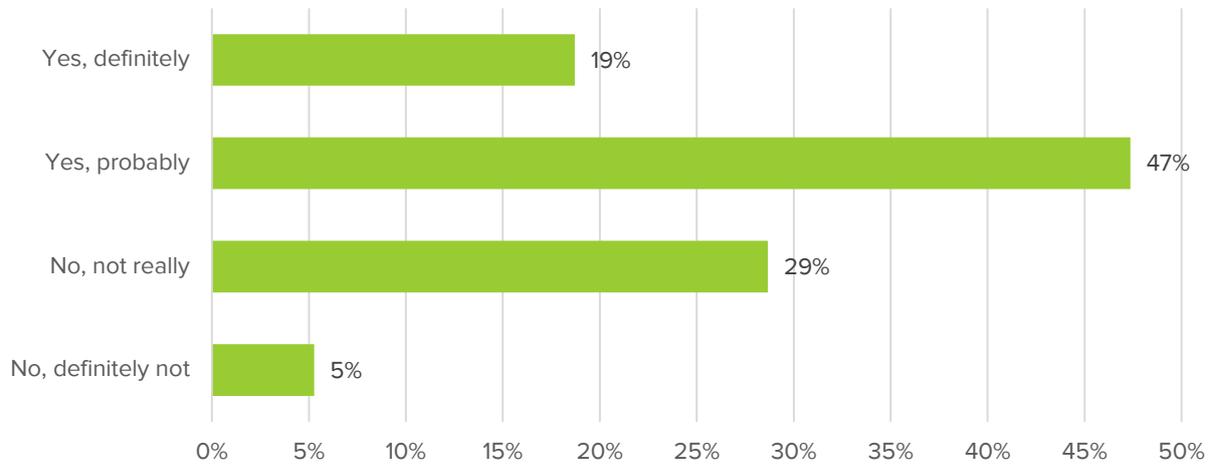


Two in five Australians (41%) wish they had at least a few more meals together.

Generational insights

Gen X and Gen Y are more likely than Baby Boomers to wish their household had at least a few more meals together (55% of Gen Y cf. 47% of Gen X cf. 25% of Baby Boomers).

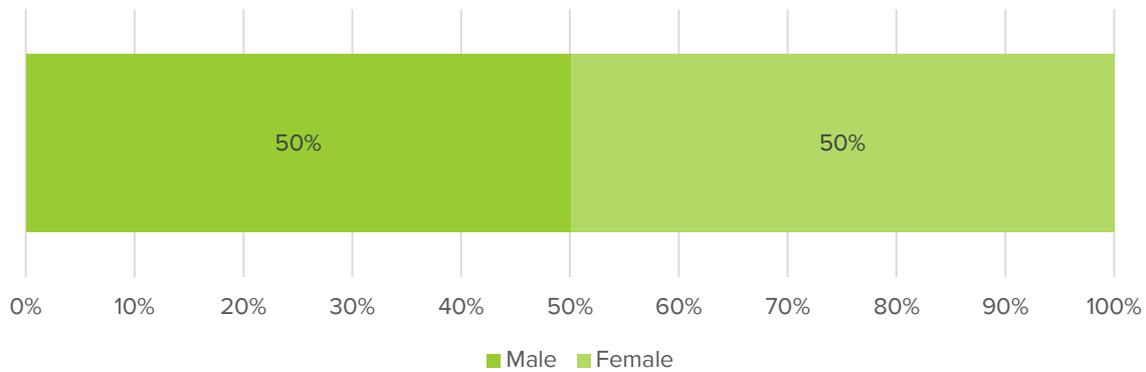
Q. Do you think the idea of a formal dinner time in Australian homes is a thing of the past?



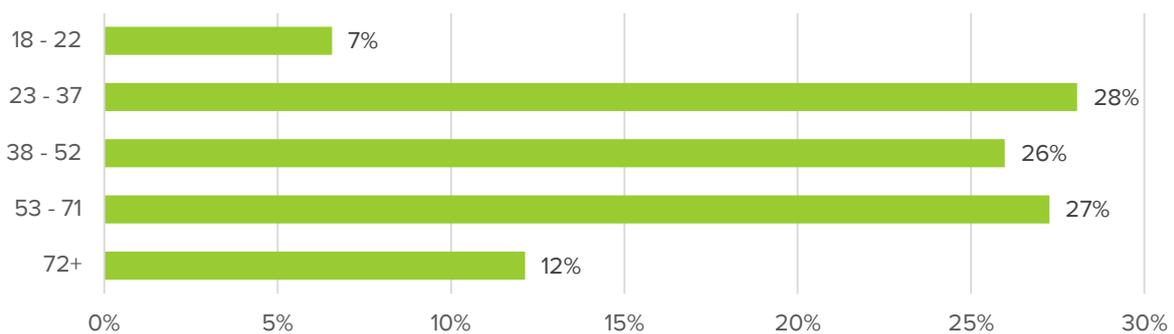
Two thirds of Australians (66%) feel that the idea of a formal dinner time in Australian homes is a thing of the past.

RESPONDENT CHARACTERISTICS

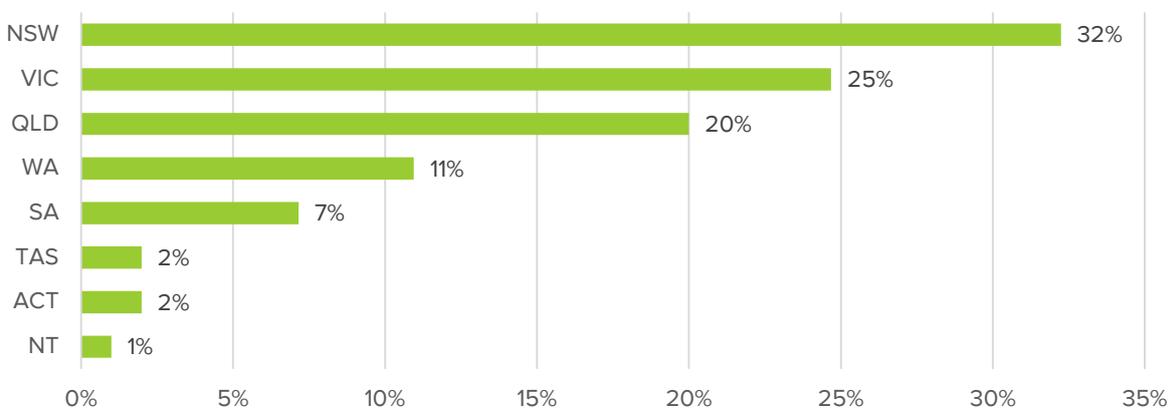
Q. What is your gender?



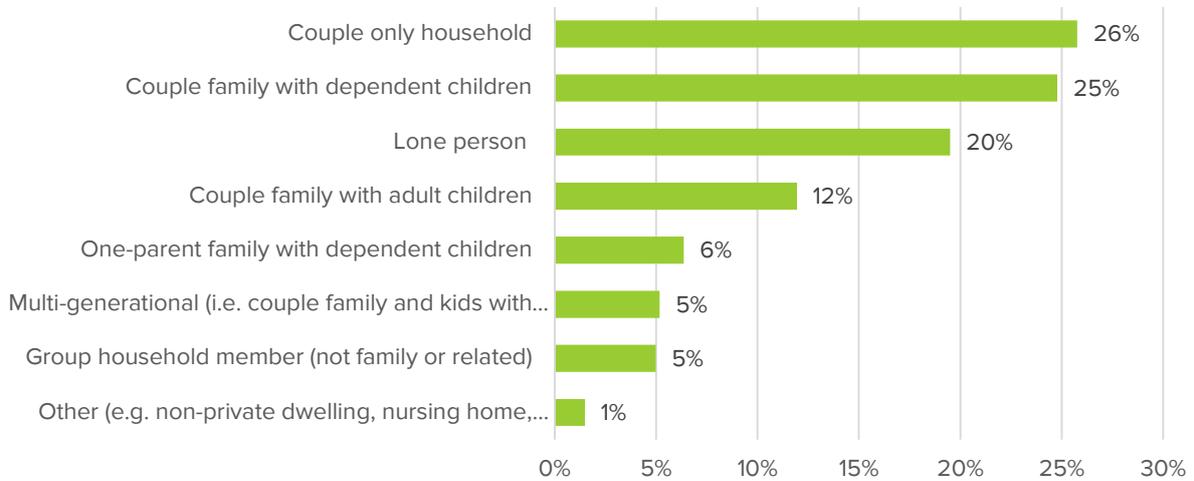
Q. What age are you turning / have you turned this year?
(2017)



Q. Where do you usually live?

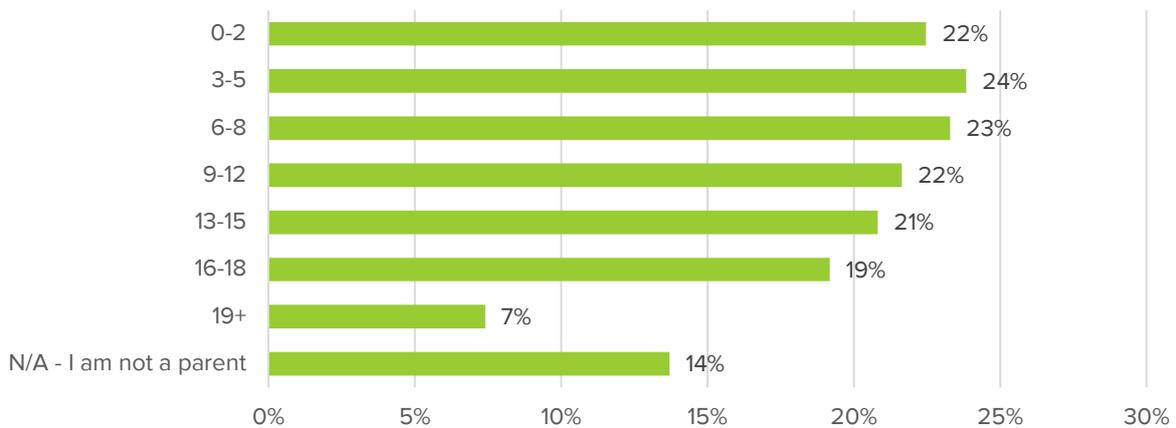


Q. What type of household do you currently live in?

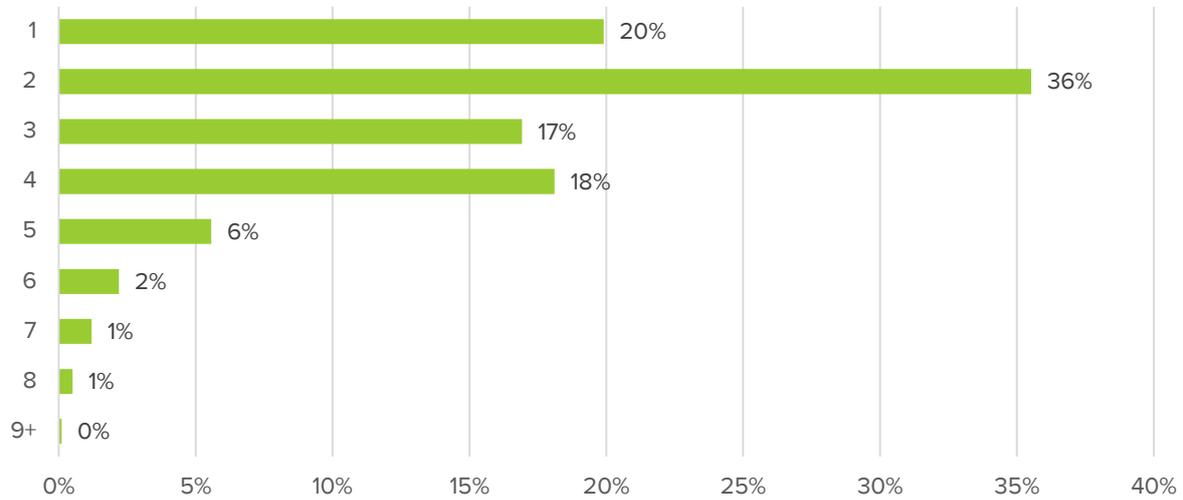


Q. What is/are the age group of your dependent child/ren? (n = 365)

Please select all that apply.



Q. How many people are normally catered for in your home (including those who live with you and those who may not live with you but eat with you regularly)?



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