PLATE UP!
Australians’ quest for authentic, conscientious and shareable food experiences reveals distinct purchase and consumption habits.
The world on our plate

Food is more central to Australians’ lives than ever before and this passion for food is manifesting in new ways. Not only are we looking for new taste sensations but the quest for fresh, authentic and conscientious food experiences reveals distinct purchase and consumption patterns.

emma™ data – which reveals the changing mindsets, preferences and behaviour of consumers, along with how they respond to emerging trends – identifies four key consumer segments1, representing 39% of the population, for whom food is particularly important.

The following sections explore these consumers’ relationships with and attitudes to food, offering insights to brands seeking to reach them.

Sensible Traditionalists
(16% of the population)
Representing the ‘solid’ Australian upper middle and middle class family, these consumers are motivated, conscientious and open but conservative in their values and consumption. Health and wellbeing are very important to them, and being internally focused they care about what they eat.

Educated Ambition
(6% of the population)
The highest earners and most educated of all segments, success and career achievement are these consumers’ top priorities. Mostly urban and without children living at home, this segment skews strongly towards women 45-64. Social life outside the home is very important to them and they are second only to ‘Social Creatives’ in their tendency to eat out at restaurants, pubs and cafes. They are above average readers of lifestyle, food and entertaining magazines.

Social Creatives
(6% of the population)
Australia’s young, highly educated and affluent urbanites comprise this category, which is heavily skewed to men under age 44. Placing the utmost importance on success and lifestyle, these achievers are hyper engaged with technology, social media and the sharing culture. Of all the segments they eat out most at licensed restaurants, cafes and pubs.

Conscientious Consumption
(11% of the population)
Although they share many of the characteristics of ‘Educated Ambition’, this highly educated and successful segment differs in its values: they place less importance on social status and consumption, and are fiscally conservative. They are also very home and health-focused, and are above average readers of house and garden as well as food and entertaining magazines.

1 For the complete list of consumer segmentations, attitudinal and category data within emma™ please email support@emma.com.au
There is a conversation culture around food like never before. Australians share their food experiences, talk about them and often flaunt them. It’s no longer a novelty to see a fellow restaurant diner pull out her smartphone, snap a picture of her entrée, and post it on Instagram, Twitter or Facebook before enjoying her first bite.

As Fairfax Media national editor, food and drink, Kate Cox puts it: “There is a whole social industry around food: what Australians cook, the restaurants they go to, the chefs they admire. Good Food for example has had 1721 per cent year-on-year growth on Facebook (now at 120,000 followers) and 11,000 on Instagram with similar growth. This illustrates why food has become such an important entertainment segment for publishers – in the same way that music and the arts have traditionally been.”

Adds Brodee Myers-Cooke, editor-in-chief of Australia’s largest food portal, taste.com.au: “Our monthly taste.com.au ‘Cook the Cover’ competition – where readers post their version of our cover – has been more popular than we dreamed. Some of the recipes take half a day to create. But no one’s yet complained that it’s taken them too long!”

emma™ data backs up the intensity of this sharing culture. Each of the four key consumer segments actively converse about food through social networks, communicating their own experiences and drawing on others’ in making their own purchase decisions. Social Creatives and Educated Ambition are by far the most determined and influential sharers. Both segments are far more likely than the general population to be early adopters of new food ideas and to lead opinion shifts within their social groups and networks.

**Word of mouth – Dining and Food**

![Chart showing word of mouth metrics for dining and food]

- Am often asked my opinions and knowledge: 156
- Am often the first to buy a new product or service among my family and friends: 143
- I encourage others to buy based on my own experiences: 152
- I have posted or shared positive comments about products, services and experiences in the past: 165

100 is the index for all Australians 14+

**Source:** emma™ Conducted by Ipsos Connect (Q2, Q3 and Q4 partial database)
Sample of respondents, all Australians 14+ n=31,833
The rise of conscientious consumption

The trend towards fresh and authentic food raises the importance of Australian grown and made. Consumers — particularly in our four key segments — care about where their food originates and what’s in it. It’s not just scares such as the contaminated overseas frozen berries controversy earlier this year that make consumers want to buy locally sourced produce. They also want to support Australian producers.

Educated Ambition are the most likely to always read product labels and say they try to buy products that are Australian-made — though all four segments find these important concerns, as the table below shows.

Food is also a way for consumers to show they care for people, and all but Social Creatives make an effort to get the right nutrition at every meal. All four segments are taking steps now to remain healthy in the future — including in their diets — and disagree with the premise obesity is not a major problem in Australia.

Source: emma™ Conducted by Ipsos Connect (Q3 and Q4 partial database)
Sample of respondents, all Australians 14+ n=64,815

You are what you eat

![Graph showing percentages of consumers who always read product labels and try to buy Australian-made products across different segments.]

- I always read product labels:
  - Sensible Traditionalists: 56%
  - Social Creatives: 59%
  - Educated Ambition: 58%
  - Conscientious Consumption: 65%

- I try to buy products that are Australian made:
  - Sensible Traditionalists: 70%
  - Social Creatives: 66%
  - Educated Ambition: 77%
  - Conscientious Consumption: 72%
Minimise me

Ipsos Australia’s 2014 Food Health Report highlighted consumer concerns about the modern Australian diet:

- **87%** of Australians think there’s too much sugar in what people eat.
- **82%** say there’s too much fat.
- **89%** agree minimal processing of food is important to them.
- **80%** believe there’s too much salt.
- **75%** say they try to avoid artificial sweeteners.
- **25%** say their priorities include reducing sugar intake generally from food.

Yet …

- **57%** say it is hard to get information you can trust on making better food and beverage choices.

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**Source:** emma™ Conducted by Ipsos Connect (Q3 and Q4 partial database)
Sample of respondents, all Australians 14+ n=20,843
The quest for authentic

Australia’s love affair with food is only getting more intense, as the range of cooking-related TV shows, magazines, newspaper sections, websites and blogs underscores.

Of the four key market segments, all are more likely than the population average to agree that ‘food is one of the passions in my life’, notably Educated Ambition who are 24 per cent more likely to say so. Unsurprisingly that translates to competence in the kitchen, with consumers in these segments describing themselves as ‘confident cooks’; professing to ‘find cooking a pleasure not a chore’; and focused on using the best quality ingredients. All but Sensible Traditionalists believe they ‘care a lot more about food compared to most people I know’.

The focus on quality ingredients is a significant trend, with leading food and entertaining editors noting Australians increasingly want their food ‘real’. As Brodee Myers-Cooke of taste.com.au, explains: “Consumers are searching out non-processed, fresh in-season produce and they like it real – it doesn’t need to be perfect. The most important thing is flavour and food that tastes like food!”

The preference for natural extends to dining out, particularly among affluent Australians. Fairfax Media’s Kate Cox remarks: “We’re seeing a lot less ‘tricky’ meals, even from top chefs. The emphasis is on great food, and chefs are letting the food talk. Ingredients are front and centre: this is seen, for example, in the rise of restaurant kitchen gardens.”

While all four segments place higher importance on fresh food than the average Australian consumer, Educated Ambition is particularly likely to purchase fresh meat and fish/seafood, and eat fresh fruit and vegetables every day.

The importance of flavour is a natural follow-on from the quest for authentic, whole food, as consumers become more adventurous and confident, and cook with spices and fresh herbs more often. Educated Ambition and Social Creatives are particularly inclined to say they like to experiment with new taste sensations and cuisines, and love trying new flavours.
Educated Ambition: Buy, eat, live

- 75% say they shop at specialty stores
- 53% more likely to buy fresh fish/seafood
- 24% more likely to agree they are a confident cook
- 21% more likely to say they find cooking a pleasure, not a chore
- 23% more likely to use the best quality ingredients
- 18% more likely to say they care a lot more about food than most people I know
- 38% more likely to say they shop at specialty stores
- 28% more likely to buy fresh meat
- 10% more likely to buy fresh meat
- 7% more likely to eat vegetables seven days a week

*More likely than all Australians 14+
Source: emma™ Conducted by Ipsos Connect (Apr 2014 - Mar 2015). Sample of respondents, all Australians 14+ n=64,815
Food for thought

With Australians increasingly interested in food, and anxious to share their own experiences and learn about others’, it’s likely that online platforms will become an increasingly potent means of engaging key consumer segments.

The availability of new cross-platform audience measurement tools, such as Ipsos’ emma™ survey, offer greater insight into emerging behaviors, the role of social media channels, and the ways in which marketers can reach consumers at the right time and place.

Sources:
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