

We have watched a healthy eating attitude come into full force this past year with more consumers than ever making healthier choices and increasing the use of natural ingredients in their everyday meals and snacking. The concept of healthier eating ranges from eating less meat, considering smaller portions, and knowing more about where your food comes from as well as what's in the food itself. All consumers are taking a more sophisticated approach in their everyday cooking by using simple ingredients and fresh foods.

As the #1 online food destination with more than half a billion annual visits, Allrecipes.com is uniquely positioned to recognize the attitudes, behaviors and trends influencing the shopping carts and kitchens of the American family. With a mix of cooks spanning ages, cooking levels and regions, Allrecipes' active community offers key insights into the current and emerging trends among home cooks from coast to coast. This year we partnered with The Hartman Group and leveraged its ongoing research and expertise in understanding the complexities of consumers'



shopping behavior and how it relates to food culture and lifestyle choices.

Here's what we found as the most compelling and significant emerging consumer trends for 2012:

INSIGHT 1: Meet The Flexitarian

Q: These days if you're not a vegetarian or a carnivore, what are you? **A:** A Flexitarian

Flexitarianism, the act of consciously cutting back on meat in your diet but still enjoying a good serving of animal protein when the timing is right, is gaining mainstream momentum. Of course, health concerns are the primary motivation behind flexitarian eating, followed by the growing appeal of vegetarian dishes, along with cost savings. But cooks are no longer treating vegetables as a meat-like substitute. For inspiration they are finding ideas in cultures with an inherent knowledge of vegetable preparation (i.e., Asia, Italy, France, India) and mixing classic techniques with modern interpretations to create full-flavored meals.

More than 1/3 of home cooks report eating less meat compared with a year ago.

Why are you cutting back on meat?



INSIGHT 2: Back to Food Basics

This is about more than consumers buying local from Farmer Bob or canning the summer crop from their personal veggie garden. From an interest in the Paleo Diet (based on the hunter-gatherer approach of lean meats, no starch, ample produce) to the consumption of fewer carbohydrates, the average consumer desires to return to a “cleaner” way of eating. They are limiting highly processed foods and instead seeking foods and beverages with antioxidants, no hormones, and a list of ingredients they can recognize and pronounce. Consumers are increasingly trying to avoid MSG, trans fats, high fructose corn syrup, hydrogenated foods, benzoate preservatives, and salt. As consumers intensify their focus on health and wellness, the resulting attitude is that “processed foods” may be contributing to weight problems, behavioral issues, and/or food allergies.



Do I Want This In My Food?	%YES	%NO
Antioxidants	69%	
Pronounceable Ingredients	54%	
Organic Ingredients	41%	
Fewer Ingredients	39%	
MSG		73%
Trans Fats		73%
Saturated Fats		70%
High-fructose Corn Syrup		64%
Hydrogenated Oils		57%
Sodium Nitrate		56%
Partially Hydrogenated Oils		55%
Artificial Colors		53%
Benzoate Preservatives		52%
Artificial Sweeteners		51%
GMOs		50%
Corn Sugar		44%

INSIGHT 3: Label Listings

Consumers are becoming vigilant label readers with calories receiving the greatest attention as they scan packages and boxes. Given the rash of contradictions they face on a daily basis, much of the label reading is part of a common sense approach to determining what's sensible to eat, and even enjoy. In most cases we've found what they are looking for is the story behind the product, seeking out or trying to avoid key ingredients, judging the healthfulness of a product, or simply looking for an expiration date. Consumers themselves say they read information on a product label for a number of different reasons: Health, curiosity, and weight management are primary considerations, which our research confirms is very often aspirational in nature.

Are you reading food labels more or less than you used to?



What motivates you to try mini desserts?

(% of homecooks)

- 38% Portion Control
- 30% Cute and Fun
- 16% Variety
- 6% Curiosity
- 10% Other



INSIGHT 4: Mini-Me

46% of home cooks report eating a mini-dessert in the past year, while 29% made the tiny treats. The most popular mini sweets, based on searches on Allrecipes.com, are cake balls, cake pops, mini-cheesecakes, mini-muffins, and mini-cupcakes. Many a big-time retailer also joined in on this wee treat trend by offering tiny baked goods. Previously, those looking for a miniature sweet treat often found themselves languishing in the late afternoon with a rather soulless candy bar that left them feeling guilty plus a little empty inside. Enter guilt-free permission for the home baker to make her own tasty, bite-size indulgences with high-quality ingredients and served in playful portions. The popular petite treats help cooks keep an eye on both the waistline and the pocketbook while deliciously satisfying sweet cravings.

INSIGHT 5: Home Economics

Coupon collecting and bargain hunting continue to be a part of consumers' behavior, and they are seeking bargains in a variety of ways including online deals, coupons clipped from the newspaper or weekly circulars, and even downloading mobile coupons. However, what's important to note is—while anxiety and recession pressures still prompt consumers to pursue a good bargain—a new value paradigm has emerged, specifically relating to food. Consumers now seek:

- **Quality** = fresh, less processed, sustainable, etc.
- **Experience** = consumption enjoyment (indulgence) or transfer of knowledge (culinary know-how or product narratives)
- **Lack of waste** = product right-sizing

So while most consumers continue to keep a watchful eye on their pocketbooks, they are not abandoning their interest in having or creating a quality food experience for themselves, their families, and friends.

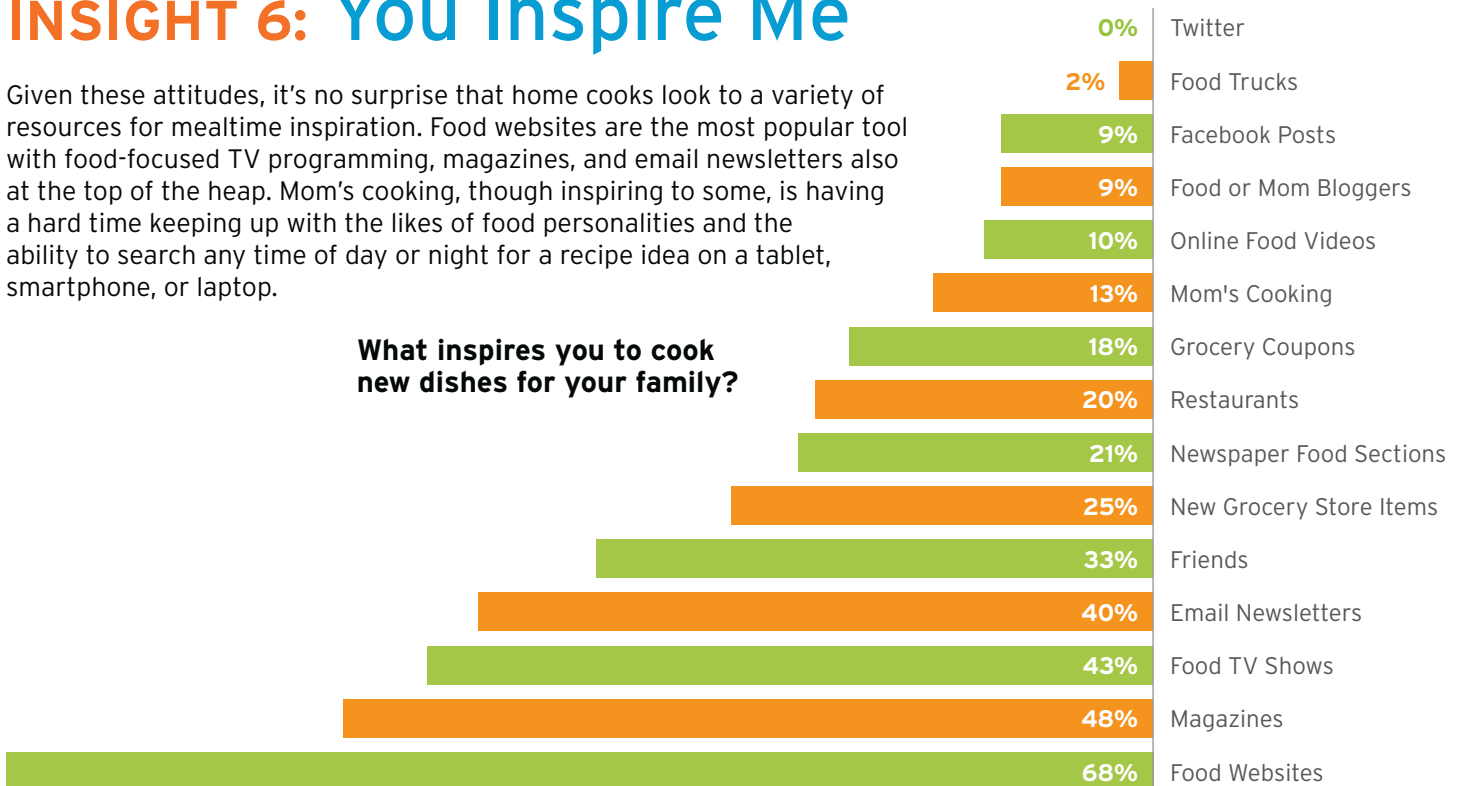
The economy has been down for a while. How are your purchasing behaviors changing over time?



INSIGHT 6: You Inspire Me

Given these attitudes, it's no surprise that home cooks look to a variety of resources for mealtime inspiration. Food websites are the most popular tool with food-focused TV programming, magazines, and email newsletters also at the top of the heap. Mom's cooking, though inspiring to some, is having a hard time keeping up with the likes of food personalities and the ability to search any time of day or night for a recipe idea on a tablet, smartphone, or laptop.

What inspires you to cook new dishes for your family?

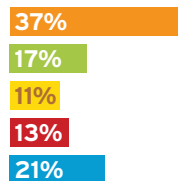


INSIGHT 7: Devices

While most consumers appear to still use their laptops and desktops to search for that perfect recipe, smartphones rule when it comes to high use across multiple tasks ranging from creating shopping lists to looking up recipe ingredients, all with in-store ease. Visits to Allrecipes.com from a mobile device were up 218% year-over-year in November 2011, while downloads of the wildly popular Allrecipes Dinner Spinner app reached 10 million. It doesn't really matter whether a home cook is keying smartphone apps in the supermarket aisle or setting up her laptop or iPad in the local café to plan Saturday's dinner party, mobile technology enhances her ability to seek, find, and notate whenever and wherever the mood for food arises. And don't forget the phone's role in snapping and posting photos of recent culinary creations and adventures to show friends on all the various social networks.



Tablet Device

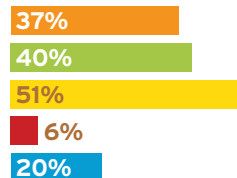


How are you using technology for meal planning/preparation?

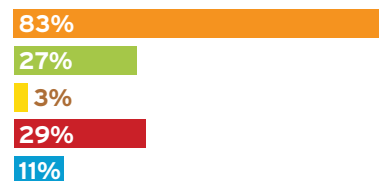
- Finding Recipes
- Creating Shopping Lists
- While Grocery Shopping
- Watching Cooking Videos
- While Cooking



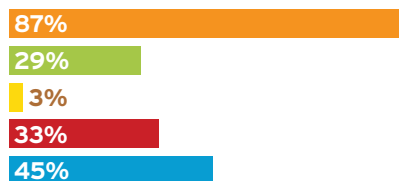
Smartphone



Desktop



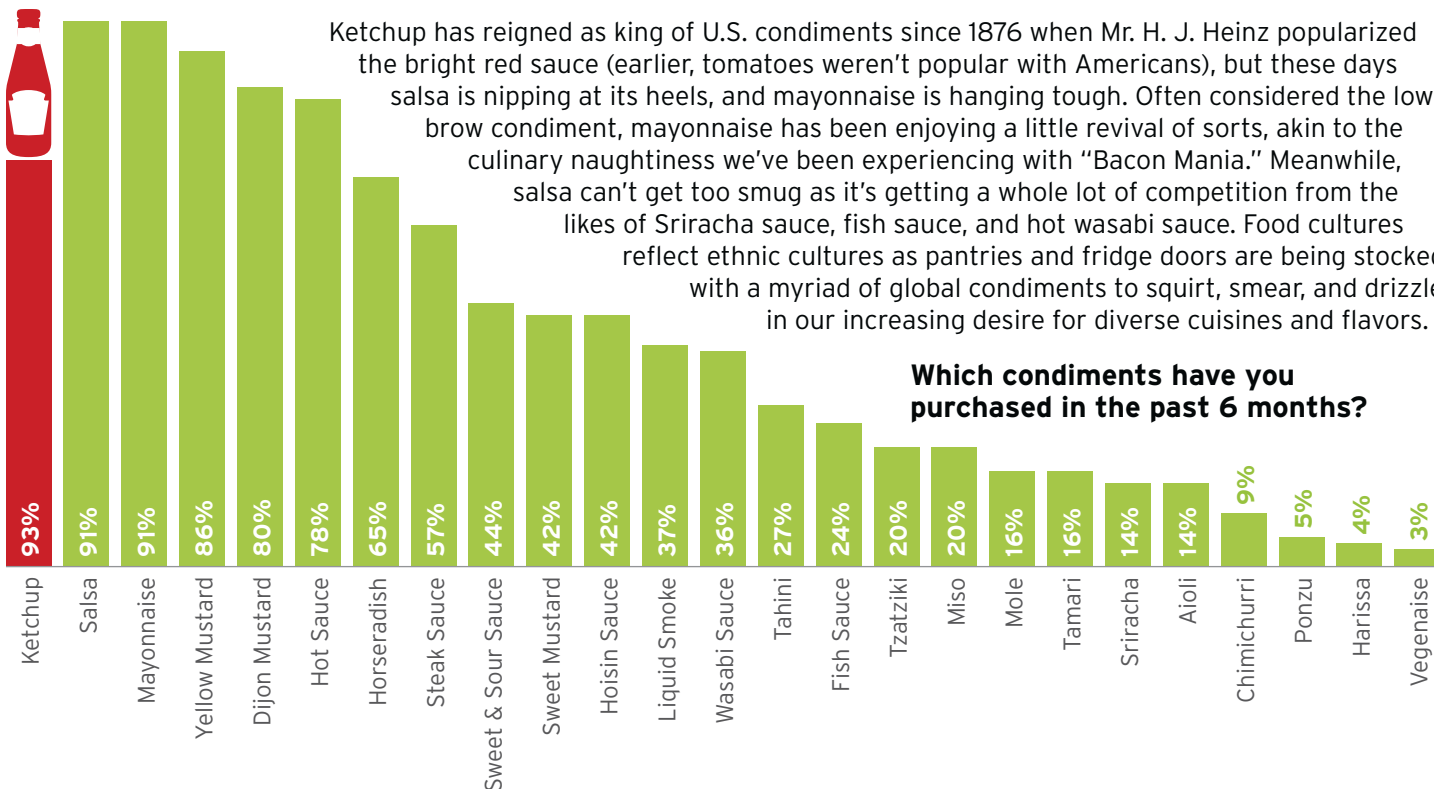
Laptop



INSIGHT 8: What's On Your Fridge Door?



Ketchup has reigned as king of U.S. condiments since 1876 when Mr. H. J. Heinz popularized the bright red sauce (earlier, tomatoes weren't popular with Americans), but these days salsa is nipping at its heels, and mayonnaise is hanging tough. Often considered the low-brow condiment, mayonnaise has been enjoying a little revival of sorts, akin to the culinary naughtiness we've been experiencing with "Bacon Mania." Meanwhile, salsa can't get too smug as it's getting a whole lot of competition from the likes of Sriracha sauce, fish sauce, and hot wasabi sauce. Food cultures reflect ethnic cultures as pantries and fridge doors are being stocked with a myriad of global condiments to squirt, smear, and drizzle in our increasing desire for diverse cuisines and flavors.



Which condiments have you purchased in the past 6 months?

INSIGHT 9:

Anytime is a Good Time for a Snack



Turns out adults snack just as often as children. Men and women snack about the same amount and, in general, snacking has become as culturally relevant to consumers as meal time. Research confirms that snacking accounts

for nearly half of all eating in the United States, so it's only natural to conclude the consumer craves healthy snacks, too. With all that said, when whole grain chips and toasted seeds, beans, and nuts begin to gain popularity—and kale chips are a polarizing discussion—it's noteworthy.

What is this?!

Chia Seeds	Tried & Liked or Interested.	29%
	Tried & Hated or Not Interested . . .	28%
	What is this??	44%

Too Healthy for Most

Toasted Seaweed	Tried & Liked or Interested.	29%
	Tried & Hated or Not Interested . . .	53%
	What is this??	18%

On the Fence

Kale Chips	Tried & Liked or Interested	40%
	Tried & Hated or Not Interested . . .	39%
	What is this??	22%

Winning

Toasted Pumpkin, Squash or Gourd Seeds	Tried & Liked or Interested	76%
	Tried & Hated or Not Interested . . .	22%
	What is this??	2%

Whole Grain Chips

	Tried & Liked or Interested	77%
	Tried & Hated or Not Interested . . .	21%
	What is this??	2%

INSIGHT 10: Love the Sandwich

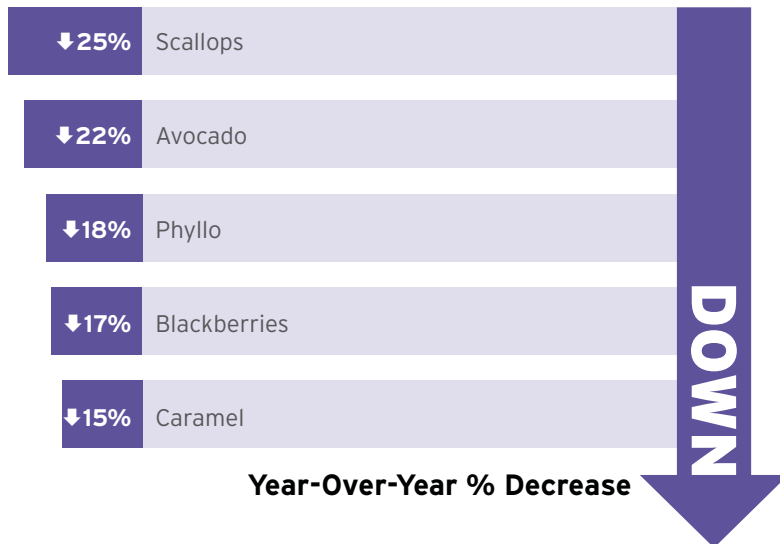
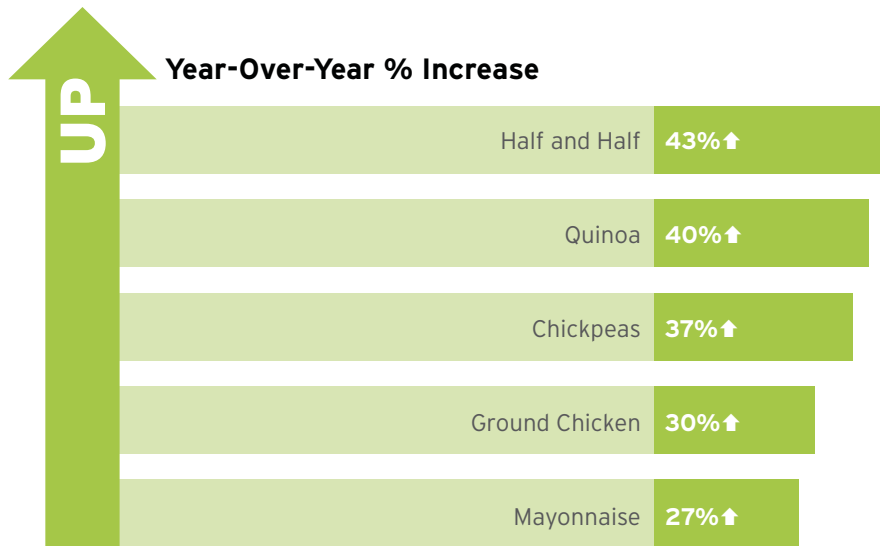
A sandwich is completely customizable, convenient, and appropriate for any meal of the day—what's not to love? The recent inclusion of more sophisticated, higher quality ingredients, from herb-infused bread to grass-fed pork and innovative condiments (e.g. caramelized onions, watercress, Sriracha sauce), has elevated the humble sandwich to one of today's best examples of comfort food. Views of sandwich-related recipes increased 16% on Allrecipes.com in 2011. One reason for this renewed popularity is the roving urban food truck that has introduced consumers to higher-quality sandwich options at budget-friendly prices. Consumers are seeking Mediterranean spreads such as hummus and baba ganoush mingling with fresh farmers' market offerings, including artisan pickles such as beets, carrots, cukes, and garlic. Grilled cheese has made a comeback, but beyond simple singles, consumers want more mature flavors, while demanding higher quality cheeses, too.



Have you tried any of the following sandwiches?

Pulled Pork		77%	Sandwiches With Flavored Breads		55%
Paninis With Artisan Cheeses		59%	Grilled Cheese With Fruit		19%
Sandwiches With Flavorful Spreads		59%	Mexican Tortas		18%
Hummus On Pita Bread		59%	Vietnamese Banh-mi		4%

BONUS: What were the fastest growing and declining ingredient searches during 2011?



METHODOLOGY Data provided is from an online survey of 1,391 Allrecipes community members. Survey was fielded October 21 to 27, 2011. Additional perspective is provided through The Hartman Group's intellectual property and consumer data. For more information on survey methodology such as response counts for each question or details on question order or format, please feel free to contact us.

About Allrecipes.com

Allrecipes, the world's largest food site, receives 750 million annual visits from home cooks who discover and share food experiences through recipes, reviews, photos, profiles, and blog posts. For 14 years, the Seattle-based site has served as a dynamic, indispensable resource for cooks of all skill levels seeking trusted recipes, entertaining ideas, everyday and holiday meal solutions and practical cooking tips. Allrecipes' global, multiplatform brand provides insights into the kitchens and cooking passions of home cooks everywhere with 17 websites, 9 mobile apps, and 13 eBooks serving cooks in 23 countries and 11 languages. Allrecipes is a division of The Reader's Digest Association, Inc. For additional information regarding Allrecipes, please visit www.allrecipes.com.

About The Hartman Group

The Hartman Group, located in Bellevue, Washington, is the predominant consumer culture consultancy in America today serving consumer packaged goods companies, retailers and organizations in foods and beverages, foodservice, personal care, shopper marketing and other businesses that comprise the consumer marketplace. Since 1989, The Hartman Group has blended primary qualitative, quantitative and trends research and consulting to understand the subtle complexities of consumer and shopper behavior. It specializes in understanding how consumer attitudes, lifestyle and behaviors lead to purchase. To learn more about how The Hartman Group stays sharply focused on how consumers live, shop and use brands and products visit www.hartman-group.com.

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