Coronavirus
COVID-19

Future Proofing Toolkit Phase II



Spain Edition

200 Days On.

BORD BIA
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Coronavirus
COVID-19

Future Proofing is core to our Covid-19 Response plan at Bord Bia.

Planning for your business future in a time of such uncertainty will not be easy.

Our ambition is to deliver industry timely consumer and market insights, robust data and assistance with strategic planning.

By downloading our Future Proofing Toolkit you've taken the first step in beginning your business' plans for a successful Post-Covid future…

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How to use the toolkit.

The toolkit is built around three key elements, each of which will help you navigate your way through the changed reality in the marketplace.

The menu for these elements is shown below. Simply click on item 1, 2 or 3 for more explanation on how to use them and if at anytime you wish to return to this page simply click the ‘home’ item in the bottom left corner of each page.

1. Indicators

2. Validators

3. Planners

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Indicators

Coronavirus COVID-19

Welcome to the Indicators section of the toolkit.

Understanding each of these indicators is your first step in developing a future proofed plan for your business. You can read each individually by clicking on their icon below:

General Behaviours













Shopper Behaviours









Consumption Behaviours



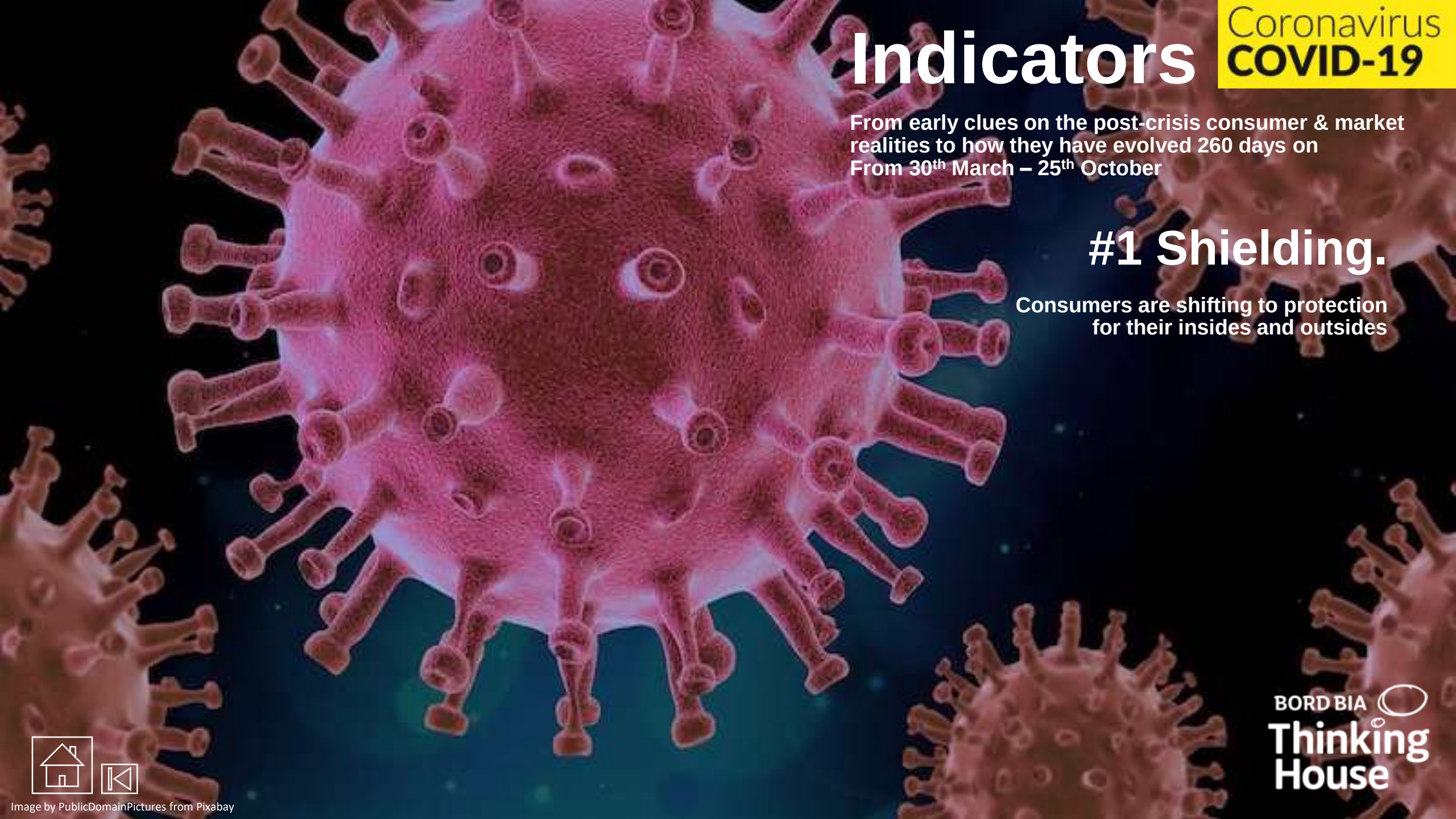








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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#1 Shielding.

Consumers are shifting to protection for their insides and outsides

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Image by PublicDomainPictures from Pixabay

#1 Shielding surges forward

It's all about immunity, as many people believe the virus is here for some time yet and, it's likely not just for now, as pandemic conversations are likely to continue, even in a Post-Covid world.

23%

of Spanish adults are taking specific supplements MORE now to fend off Covid-19

Bord Bia Indicators Barometer, Oct 2020

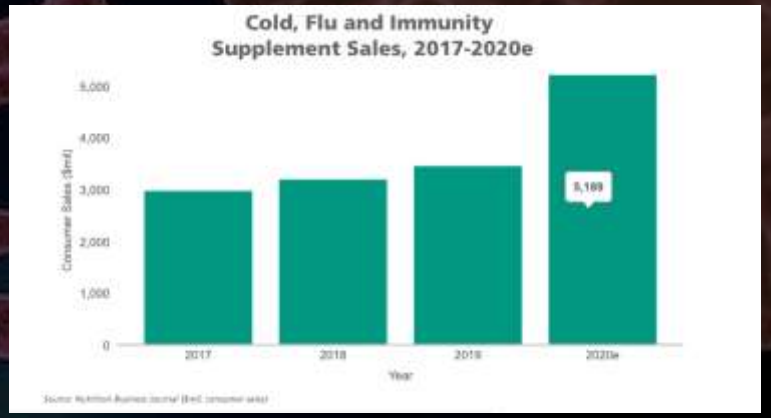
31%

of Spanish adults are choosing foods that boost immunity more now

Bord Bia Indicators Barometer, Oct 2020

NBJ estimates that sales of cold, flu and immunity supplements will reach $5.2 bn this year with growth of 51.2% over 2019. According to NBJ, nearly 10% of all US supplement sales in 2020 will be for immune support.

Even with the growth curve normalising in the coming years, NBJ expect a lasting increase of $1.5 billion over pre–Covid forecasts for cold, flu and immunity.





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#1 Shielding surges forward

People are shielding more through the foods that they choose.

With a growing focus on food, people are also looking at adding healthier ingredients to eat better. As health care services struggle across the globe, many people are battling to take control where possible and food is one area where they can. This presents an opportunity for food and drinks businesses to engage with consumers through the adaptation of recipes to create “hero healthy” ingredients and products.

16%

of Spanish adults are cooking fish/seafood for its known health benefits more often now

Bord Bia Indicators Barometer, Oct 2020

20%

of Spanish adults are reducing their meat consumption more now, +5% since May 2020

Bord Bia Indicators Barometer, Oct 2020

There has been an increase in cooking fish/seafood/shellfish for known health benefits during the pandemic.

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#1 Shielding specifics

Vitamin C, Vitamin D and probiotics are the star players in this battle ground, with growing awareness around the benefits of these nutrients ensuring their continued growth for the foreseeable future.



"People have nothing to lose and much to gain by taking Vitamin D as protection during the Covid-19 Pandemic, according to a paper by Irish and UK Scientists, making clear that its for a healthy immune not solely for bone and muscle health" Paul Cullen, Irish Times, October 5th

"Almost half the Irish population is deficient in D which is produced in the skin. People should be taking 800 IU, twice the recommended amount in England, Scotland and Wales"
TCD Scientist Prof Rose Anne Kenny, Irish Times, October 5th

According to an article in newhope.com, Vitamin C is a leading player contributing $798 million to immunity supplement sales in the US in 2020 (NBJ) with, according to a nationally representative survey undertaken in the market, 47% of consumers taking Vitamin C for immunity purposes.

Probiotics continue to emerge with 30% of those surveyed reporting use of probiotics with projected growth of 40% *as it continues to drive growth outside of gut health.*

https://www.newhope.com/market-data-and-analysis/analysts-take-immunity-supplement-sales-expected-reach-5b-2020

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#1 Shielding.

Implications for Irish Food & Beverages:

- A greater focus on food functionality
- A greater focus on the science of food function
- Even greater scrutiny on immunity claims
- Innovations in hand held snacking
- Innovations in eye protection functional foods

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
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#2 Comfort Cooking.

Consumers are retrenching to familiar old favourites and forming new habits

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Image by PublicDomainPictures from Pixabay

#2 Comfort In Cooking

Consumers are still retrenching to familiar old favourites and forming new habits. In Spain, this has fallen back slightly since May 2020 but still significantly more prevalent now vs. pre pandemic.



Anna Guerrero @ pexels.com

22%

of Spanish adults are choosing familiar favourite foods more often now due to Covid-19
-7% since May 2020

Bord Bia Indicators Barometer, Oct 2020

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#2 Comfort In Cooking

With nights out off the table, people are replacing them with “treat” nights in and quality is playing a greater role.

64%

of global consumers are going to restaurants less or have stopped altogether,

Feeling the Pinch 2020

15%

of Spanish adults are buying better quality beef more often now (-2%)

Bord Bia Indicators Barometer, Oct 2020

Malimaeder@pexels.com

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#2 Comfort Cooking.

Early Implications for Irish Food & Beverages:

- Consumers embrace comfort foods
- Consumers replicate their take-out favourites
- Consumers reject convenience cooking
- *Consumers are looking for "healthier" comfort food options*



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Indicators

Coronavirus COVID-19

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#3 Simply Safe.

Consumers are looking for security in simplicity, transparency and familiarity

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Image by PublicDomainPictures from Pixabay

#3 Simply Safer

Personal safety has become a part of the daily ritual.



Anna Shvets @ pexels.com

99%

of Spanish adults are wearing a mask while doing the grocery shopping for the household (+11%)

Bord Bia Indicators Barometer, Oct 2020

97%

of Spanish adults are washing their hands well and often with soap & water /or sanitizer

Bord Bia Indicators Barometer, Oct 2020

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#3 Simply Safer

Food Safety is continuing to play a role of growing importance for consumers.



Anna Shvets @ pexels.com

48%

of Spanish adults believe that it's important that the food and drink they buy is sealed and hasn't been touched

Bord Bia Indicators Barometer, Oct 2020

41%

of Spanish adults are choosing their supermarket MORE SO on their safety than they did before

Bord Bia Indicators Barometer, Oct 2020

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#3 Simply Safer – local and sustainable sourcing

Since the start of the pandemic, 27% of Spanish adults feel that understanding where their seafood comes from is more important now and there is an increase in buying more locally sourced seafood/ shellfish.

21%

of Spanish adults are buying more locally sourced seafood, +3% since May 2020

Bord Bia Indicators Barometer, Oct 2020

17%

of Spanish adults are buying more from certified sustainable fisheries, +3% since May 2020

Bord Bia Indicators Barometer, Oct 2020

16%

of Spanish adults are buying more locally sourced shellfish, +3% since May 2020

Bord Bia Indicators Barometer, Oct 2020

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Image by heberhard from Pixabay

Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October



#3 Simply Safe.

Consumers are looking for security in simplicity, transparency and familiarity and more formal guarantees of safety

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Image by PublicDomainPictures from Pixabay

Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
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#4 Trace Tech.

Consumers are sharing their data in new ways

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Image by PublicDomainPictures from Pixabay

#4 Trace Tech

With safety a high priority, people want to know more than ever about where their food comes from. Behind the scene stories are going to become ever more important and it may mean more people embrace "trace tech".

39%

of Spanish adults are choosing local grocery brands MORE now because of Covid-19 (-3%)

Bord Bia Indicators Barometer, Oct 2020



27%

of Spanish adults feel that understanding where their seafood comes from is more important now

Bord Bia Indicators Barometer

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#4 Trace Tech.



Early implications for Irish Food & Beverages:

- Consumers embrace data-sharing for health purposes
- Consumers adopt ‘virtual shopping lists’ via AI
- Consumers allow wearable data to change their diets
- Consumers embrace contactless retailing

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Image by PublicDomainPictures from Pixabay



Indicators

Coronavirus COVID-19

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From 30th March – 25th October

#5 The New Social.

Consumers are embracing technology to fight social distancing

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Photo by Sergey Zolkin on Unsplash

#5 The New Social

It's likely that we will have expended our personal bandwidth on "online social". Getting back to being with our friends is what people really want. The top thing people miss, is spending time with friends.

With over 4 in ten in Spain now working from home in some capacity, that would not have been the case pre Covid-19, and 32% missing colleagues, people are craving real company.



82%

TOP THING PEOPLE MISS is spending time with friends

Bord Bia Indicators Barometer, Oct 2020

68%

of Spanish adults miss eating out in formal restaurants

Bord Bia Indicators Barometer, Oct 2020

72%

of Spanish adults miss dinner parties

Bord Bia Indicators Barometer, Oct 2020

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mentatdgt@pexels.com

#5 The New Social “Zoom” online social fatigue is now a “thing”

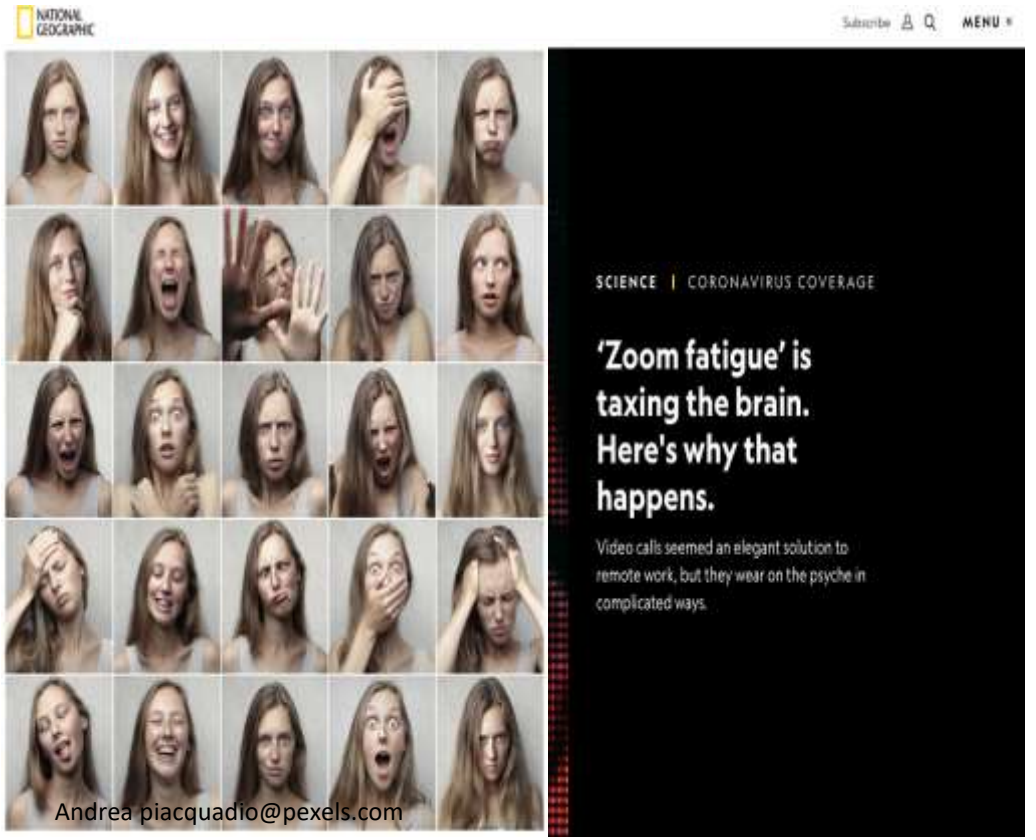
In fact, online social has proved challenging for the brain.

Virtual interactions can actually be hard on the brain says Andrew Franklin, an assistant professor of cyberpsychology at Virginia’s Norfolk State University.

In a National Geographic Article published this year, Franklin explains how a typical video call impairs our natural abilities to read body language. This in turn forces people to work harder to communicate. Your brain is often forced to multitask the article states, often moving between conversations which in itself is exhausting.

There is often a prolonged split in attention on such a platform which creates a sense of being drained while having accomplished nothing. Multi viewing screens can make this all the more complex and the brain can become overwhelmed by too much unfamiliar stimuli while being ever more focused on searching for non-verbal cues that it can’t find.

And so a traditional phone call may be less taxing on the brain, Franklin says, because it delivers on a small promise: to convey only a voice and so its less likely that we are going to be “booking” zoom time for chats with friends into the future.



Andrea piacquadio@pexels.com

https://www.nationalgeographic.com/science/2020/04/coronavirus-zoom-fatigue-is-taxing-the-brain-here-is-why-that-happens/

Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#5 The New Social.

Consumers are embracing technology to fight social distancing

Implications for Food & Beverages:

- An even greater focus on brands ‘talking directly’ to consumers
- An ability to have deeper conversations with consumers
- An opportunity to create ‘shared’ experiences around brands
- Brands can link into healthy lifestyle routines more overtly
- Brands can encourage consumers to ‘get creative’
- Consumers may expect more entertainment from shopping

Photo by Sergey Zolkin on Unsplash

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#6 Stocking-In.

How grocery shopping evolves from panic to preparedness

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Image by Alexas_Fotos from Pixabay

#6 Stockpiling surges once more

“Being prepared” in food terms has increased during Covid-19, with 3 in 10 Spanish adults stocking up on food essentials and maintaining a rolling food stockpile more often as a result.



31%

of Spanish consumers are maintaining a rolling food stockpile more often now

Bord Bia Indicators Barometer, Oct 2020

17%

of Spanish adults are buying more frozen seafood, +3% since May

Bord Bia Indicators Barometer, Oct 2020

28%

of Spanish consumers are stocking up MORE on essential food and drink for their home since Covid-19, although this is down 5% since May

Bord Bia Indicators Barometer, Oct 2020

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#6 Stocking-In.

How grocery shopping evolves from panic to preparedness

Early Implications for Irish Food & Beverages:

- A marketing opportunity for long-life foods
- Innovation opportunities in packaging - new formats/storage
- Promotional opportunities to manage scarcity
- Pricing opportunities to ‘nudge’ shopper behaviour
- Opportunities in frozen foods

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Image by Steve Buissinne from Pixabay

Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#7 Risky Business

Shoppers are shying away from produce on open display and touchable



Photo by EVG Photos at Pexels

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#7 Risky Business

Minimising store visits is becoming more of a norm across different markets and retailers are adapting with different strategies.

Both Co-op and CVS have rolled out robots in recent months.

Eight Co-op stores are now making this service available and correspondingly, Co-op has seen the number of customers availing of this service more than double since the start of lock down with the value of transactions increasing four fold as shopping habits change. Shoppers order their products via an app. Their products are then picked in-store and packed in the robot after which they are delivered for a fee varying on the distance travelled. Deliveries are free of charge for CVS Pharmacy customers.

56%

of Spanish adults are minimising their trips to the shops due to the pandemic, although this is down 15% since May 2020

Bord Bia Indicators Barometer, Oct 2020



IGD RetailAnalysis

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Image by Negative Space from Pexels

#7 Risky Business

Minimising store visits is becoming more of a norm across different markets and retailers are adapting with different strategies.

Carrerfour launched its first new Mobi Mart in the UAE in March.

The mart will move around particular districts and will include a range of produce from vegetables, fruits and fresh food as well as organic and frozen foods but will adapt also to include products that suits the needs of the local shopper.

This service allows people both the “social” and “local” opportunity whilst enabling them to feel safe and may in itself act as an alternative to the “proxy” shopper (#9).



https://www.tellerreport.com/business/2020-03-04---mobi-mart----a-mobile-store-from-carrefour-in-dubai-.B1zAhBon48.html

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#7 Risky Business

Antiviral technology may lead to lots of new innovations and present new antiviral packaging opportunities for food and drinks brands.

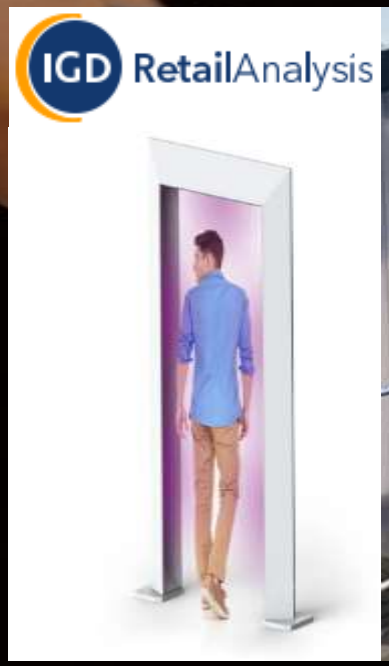
As touching of products remains an ongoing concern, we are likely to see more and more innovation in this space.

Retailers have been active in experimenting with a lot of new antiviral technology in-store.

According to IGD Data, stores such as Carrefour and Intermarche have introduced safety cubes and decontamination tunnels to kill bacteria as people walk through stores.

Magnolia bakery in New York have also introduced a “cleanse portal” and a business in Monaghan has even created antiviral door handle for schools.







48%

of Spanish adults believe that it’s important that the food and drink they buy is sealed and hasn’t been touched

Bord Bia Indicators Barometer 2020

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#7 Risky business in the restaurant world

Restaurants are also starting to experiment with no contact strategies.



KFC in Russia have opened a “no contact” restaurant. The restaurant guarantees food safety and social distancing through innovative technology.

Through robotic arms the food is transported to pick up points where customers can pick it up using a special pin code whilst also being able to pay using a card or to complete their purchase and receive their food.

https://www.trendhunter.com/trends/amazon-dash-cart

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October

#7 Risky Business.

Shoppers are shying away from produce on open display and touchable

Implications for Food & Beverages:

- A challenge to maintain the multi-sensory appeal of produce in a no-touch world
- Ways to create a new theatre for fresh produce to showcase these products
- Innovations that deliver these solutions in a way that is sustainable
- A new commercial model for retailers and business owners
- A challenge for in-store sampling in this environment
- Innovations in “robotic” retail and food service

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Photo by Kate Remmer on Unsplash

Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 260 days on
From 30th March – 25th October



#8 P to P Purchasing.

How person to person contact evolves in the digital retail world

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Image by Mohamad Hassan from Pixabay

#8 P to P Purchasing

KarolinaGrabowska@pexels.com

While shopping online has come down a little, three in ten are doing shopping online more often. With a *small increase of more buying seafood online now too, it might be worth understanding how to effectively engage the seafood shopper online.**



35%

of Spanish consumers are grocery shopping online more now as a result of Covid-19, down 6% since May 2020

Source: Bord Bia Indicators Barometer, Oct 2020

7%

of Spanish consumers are buying seafood/shellfish online more now.

***(However, there are 4% doing less indicating relatively minor increase)**

Source: Bord Bia Indicators Barometer, Oct 2020

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#8 P to P Purchasing

Direct to Consumer Models have potential to disrupt the market more.

Heinz launched its Heinz to Home Online Service during Covid-19. This service allowed shoppers to buy “product bundles” and have them delivered home directly.

This emerged as a result of difficulties in buying staple purchases as stockpiling took hold.

These bundles comprise of 16 of Heinz favourites including tomato soups and beans.

As a nice social initiative they also partnered with Blue Light Card which is a UK discount service for workers in the NHS, emergency services, social care and the armed forces, to provide free postage and prioritise shipping for orders from frontline workers.



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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 6 months on
From 30th March – 25th October

#9 P to P Purchasing.

How person to person contact evolves in the digital retail world



Early Implications for Brands & Retailers:

- Authority bias means shoppers look for ‘human help’
- Brands can take a lead on ‘being there’ for consumers
- Direct to consumer channels may become more popular
- Chatbots are increasingly sophisticated at replicating P to P
- Retailers can enhance online shopping experience through AI
- Education around food preparation can be driven through AI





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Image by Mohamad Hassan from Pixabay

Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 6 months on
From 30th March – 25th October

#9 Proxy Purchasing.

How shopping for the cocooned changes our behaviour



Image by Jesse Yelin from Pexels

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#9 Proxy Purchasing

The drop off in proxy shopping may have been replaced with online shopping and some of the new D2C channels.

According to a recent US Mintel report, those age 65+ are likely to be major drivers of ecommerce growth in the short to medium term.

A number of factors are likely driving this, such as ongoing concern about exposure to the virus and just getting more accustomed to this new way of shopping.

Mintel found that 43% of those in this age group have shopped more online since the crisis.

Article: Essential Retail, James Coker
https://www.essentialretail.com/news/elderly-consumers-drive-ecommerce/

31%

of Spanish adults are shopping more for an older friend or family member
-2% vs May 2020
Bord Bia Indicators Barometer, Oct 2020

78%

of Spanish adults are avoiding contact with older friends or family
Bord Bia Indicators Barometer, Oct 2020

johnmoesesbauan@unsplash.com

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 6 months on
From 30th March – 25th October

#9 Proxy Purchasing.

How shopping for the cocooned changes our behaviour

Early Implications for Brands & Retailers:

- Shopping for cocooners will likely involve list-making for control
- Brand owners can find ways to get on that list
- Opportunities may exist in-store for nudges to defuse Choice Overload
- Agency shoppers may need help navigating categories they are unused to
- Brand owners can position themselves to help deliver that ‘Warm Glow’

Image by Jesse Yelin from Pexels

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 6 months on
From 30th March – 25th October

#10 Mood Food.

How we are choosing food that make us feel good

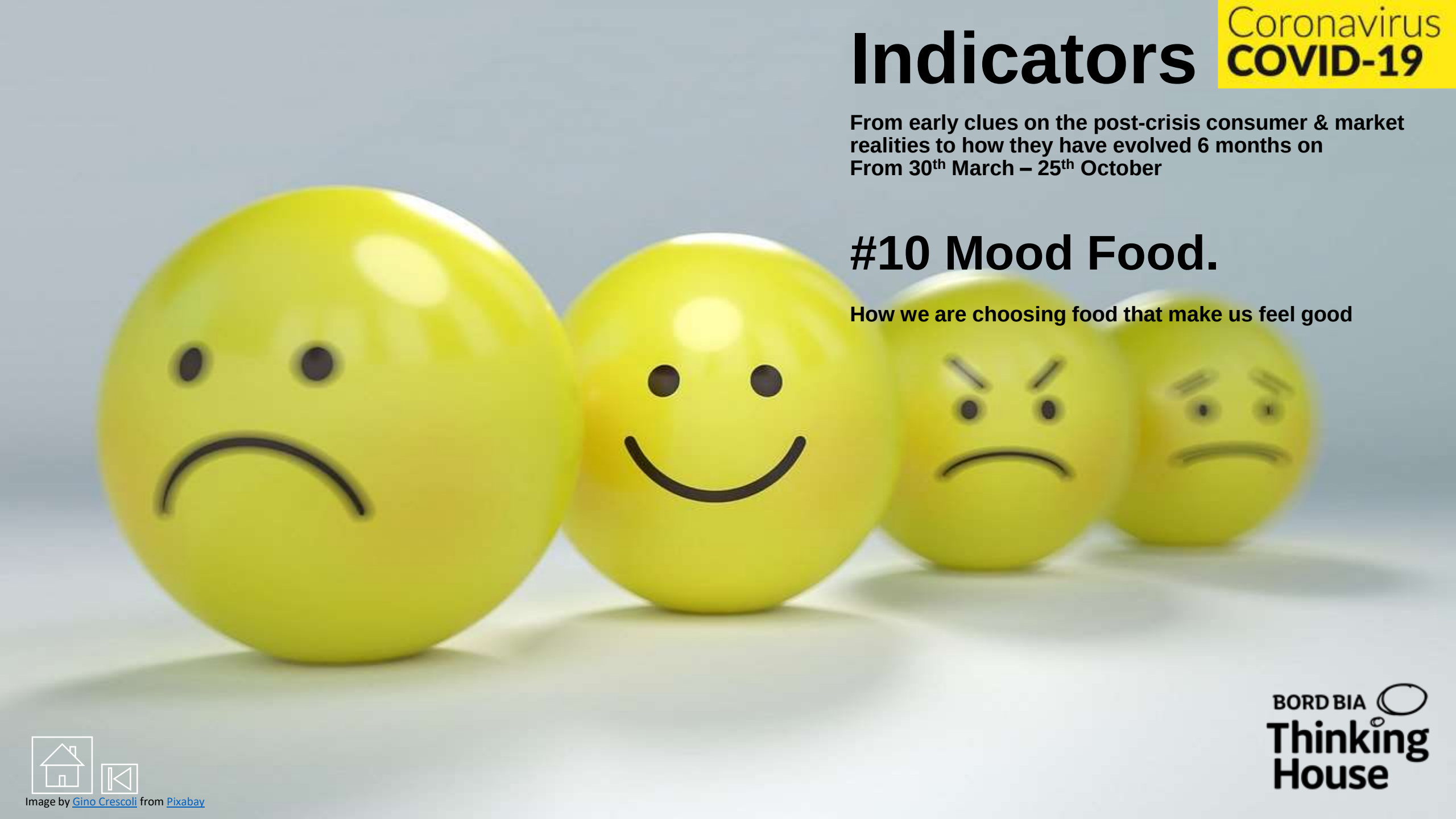


Image by Gino Crescoli from Pixabay

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#10 Mood Food

A significant knock-on to Covid-19 is the rise in anxiety levels. Health anxiety disorders are on the rise globally and *coronavirus stress syndrome* has become quite prevalent. In Spain, mental health concerns are extremely high relative to other markets.

70%

of Spanish adults are very or extremely concerned about the impact of Covid-19 on peoples mental health

Bord Bia Indicators Barometer, Oct 2020

According to data gathered by Spotify for World Mental Health Data (Saturday 10 October), the music platform has seen a 50 per cent jump in global listens for playlists relating to mental health this year. (Independent UK)



Elean Krina@pexels.com

"This pandemic has accelerated traction for the next era of functional foods. People are now prepared to trial dietary solutions for mental health issues."

Andrew Wardlaw, MMR

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#10 Mood Food

Sweet treats and snacking are often a “go to” for dealing with stress in uncertain times. We saw much consumption of these foods in the early phases of Covid-19. As people are probably trying to adapt their habits to embrace healthier lifestyles, we are now seeing a fall off in these behaviours.



28%

of Spanish adults choosing low calorie foods to manage weight MORE often now
Bord Bia Indicators Barometer, Oct 2020

25%

of Spanish adults are checking nutritional content on the foods they buy MORE now
Bord Bia Indicators Barometer, Oct 2020

There is a shift in mindset around “treat eats”. Products that are treat oriented but that also deliver on a functional benefit such as improving sleep and happiness are gaining as much traction as those that support immune health.

Recent research conducted by MMR according to foodnavigator.com indicates the extent to which consumers are now prepared to buy food and drinks products that address the benefits of sleep, anxiety and mental focus issues.

The opportunity now is about not just protecting the microbiome from the coronavirus but also corona anxiety.

18%

of Spanish adults are having more sweet treats since Covid-19.
This has fallen by 11% since May
Bord Bia Indicators Barometer, Oct 2020

19%

of Spanish adults are doing more snacking outside regular mealtimes since Covid-19
This has fallen by 14% since May
Bord Bia Indicators Barometer, Oct 2020

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#10 Mood Food

With a rise in alcohol consumption in homes during the early stages of Covid-19, people may now start seeking out alternatives, as health comes into focus. “Hop forward” beverages is one new experimentation process we are seeing emerge.



Breweries and beverage companies are experimenting with new drinks that incorporate hops. They’re combining hops with sparkling water, tea, and soda to create refreshing non-alcoholic drinks, often with no calories or added sugar. Most are tasty on their own, but they also make great cocktail mixers for when you are drinking.

These new hoppy beverages differ from non-alcoholic beers, which are basically just normal beers with the alcohol removed. Sparkling hop waters and teas, on the other hand, are made using a totally different process that doesn’t produce alcohol. They’re also made without grains.

25%

of Spanish adults are drinking less often at the weekends as a result of Covid-19

Bord Bia Indicators Barometer, Oct 2020



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https://www.foodnavigator.com/drinks/the-newest-beverage-trend-is-hoppy-drinks-that-arent-beer

Ketut Subiyanto
www.pexels.com

Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved 6 months on
From 30th March – 25th October

#10 Mood Food.

How we are choosing food that make us feel good



Implications for Irish Food & Beverages:

- Brands have permission to allow consumers lose some self-control
- Deliver “Active Escapism” through flavours of the world cuisine
- Develop ‘small rewards’ in food service & retail
- And still find healthy ways to deliver ‘fresh rewards’ for immediate consumption
- Mood Food for mind management
- New healthier beverages

Image by Gino Crescoli from Pixabay

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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved more than 200 days on From 30th March – 25th October

#11 Smaller World.

How kids disrupted routines are influencing consumption

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#11 Smaller World takes on health

The “mindless” snacking and “small rewards” given to children in lockdown are now coming under increased scrutiny as we move through Covid-19. The future is about MORE healthy, added value snacks.

Snacking more in lockdown was often about “mindless eating” and providing children with small rewards to get through the day.

According to an article in the grocer which highlights a survey conducted by the Oral Health Foundation, seventy per cent of families with kids aged under five say their little ones have been snacking more in lockdown.

One Italian study found that lockdown put obese children at risk of gaining weight because they were likely to be eating more junk food, sleeping longer and consuming the equivalent calories of an extra meal a day.

With one in five British children overweight or obese by the time they begin primary school, according to the NHS, these statistics are a cause for concern.

https://www.foodnavigator.com/Article/2020/05/15/Do-free-school-meals-help-reduce-obesity-rates



Source: https://koalapicks.com/snack-boxes/

A business called Koala Picks launched in Abu Dhabi in September has managed to tap into a range of needs for parents experienced since Covid-19:

- ✓ Creating new healthy lunch box fillers addressing Immunity needs
- ✓ Different pack sizes for different ages and appetites
- ✓ Addressing “5 a day” requirements
- ✓ Delivery through subscription
- ✓ Educational workshops for families
- ✓ Bakery and family cooking classes to tap into the baking buzz generated during Covid-19

https://www.timeoutabudhabi.com/kids/447675-a-new-range-of-school-snacks-has-launched-in-the-uae

#11 Smaller World takes on health

The emergence of Generation Germaphobe from Covid-19 could have a negative impact on the microbiome.

As kids come out of Covid-19 there is a building body of evidence that children are likely to be left with various Covid psychological legacies.

Children take their cues from parents and in a world where “transparent panic” about germs and disease have become the now normal, we are likely to see the emergence of Generation Germophobe. At the minimum, we might see a fixation with cleanliness.

So what is the knock-on - something to watch is the wiping out of potential good bacteria – the diverse collection of microbes which are hugely important to digestive health, metabolic function and immune responses.

Enhanced dairy products for toddlers and growing children is one area that we might see growth for microbiome maintenance in an over sanitized world as well as a growing range of kids snacks for school designed to tackle gut health.



https://ie.iherb.com/

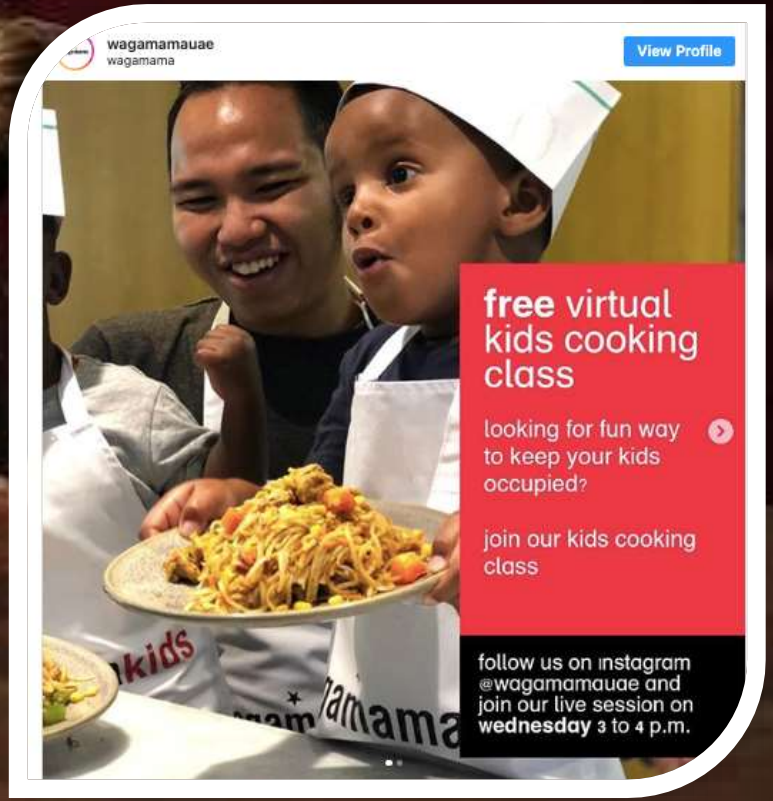
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#11 Smaller World gets larger

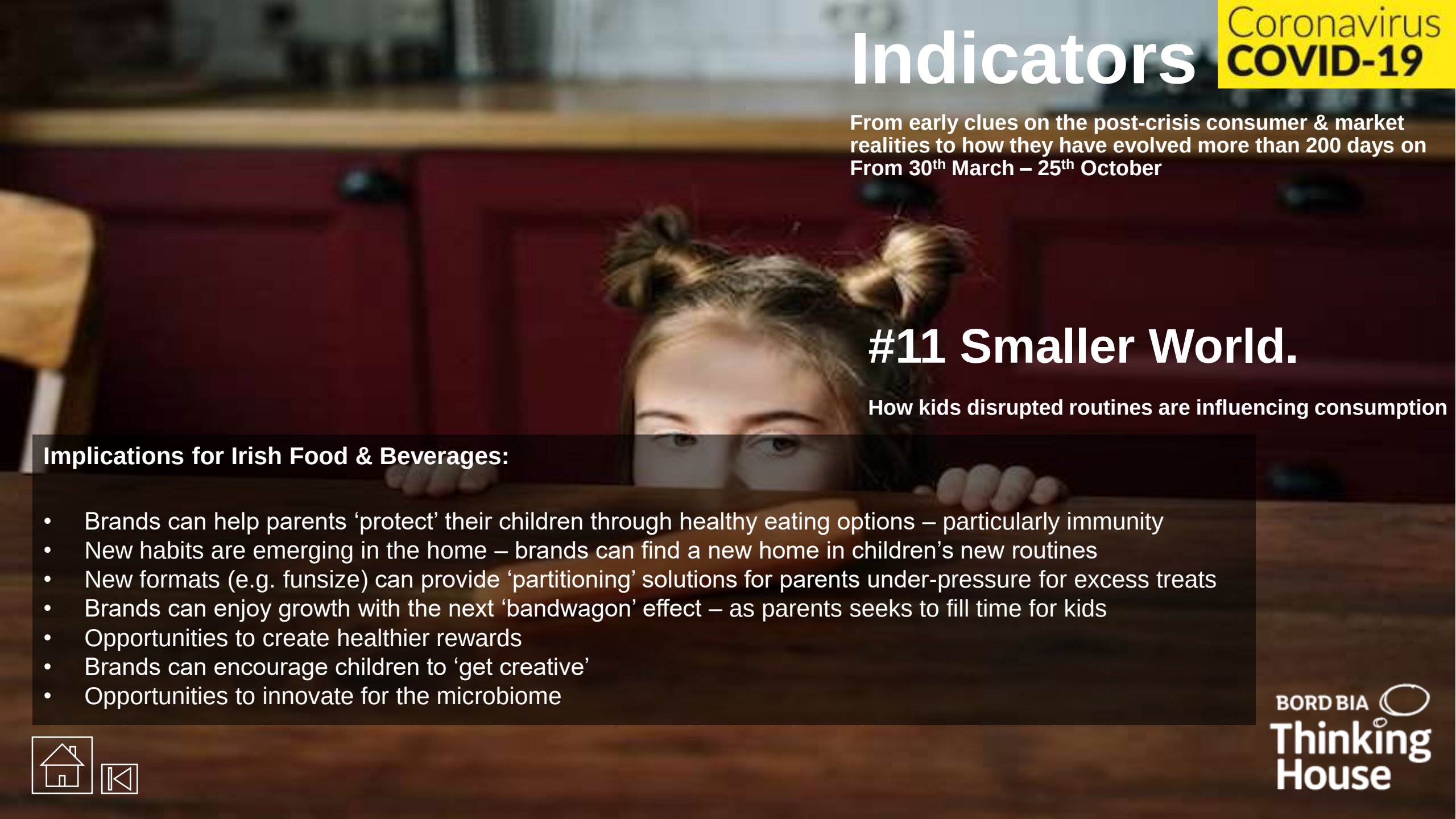
Lockdown forced children to explore creativity in new ways of which cooking was one beneficiary …are there opportunities for brands to build on this?

Many brands used the lock down opportunity to tap into creating shared family experiences during Covid-19.

Wagamama in the UAE is one such brand kicking off online cooking classes on Instagram - weekly classes cooking Wagamama favourites were conducted, where ingredients of recipes were posted on line before the classes.



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Indicators

Coronavirus COVID-19

From early clues on the post-crisis consumer & market realities to how they have evolved more than 200 days on From 30th March – 25th October

#11 Smaller World.

How kids disrupted routines are influencing consumption

Implications for Irish Food & Beverages:

- Brands can help parents ‘protect’ their children through healthy eating options – particularly immunity
- New habits are emerging in the home – brands can find a new home in children’s new routines
- New formats (e.g. funsize) can provide ‘partitioning’ solutions for parents under-pressure for excess treats
- Brands can enjoy growth with the next ‘bandwagon’ effect – as parents seeks to fill time for kids
- Opportunities to create healthier rewards
- Brands can encourage children to ‘get creative’
- Opportunities to innovate for the microbiome

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#12 Waste Not...

Consumers are using strategies to make their food go further and cut down on waste



Photo by Joshua Hoehne on Unsplash

BORD BIA Thinking House

#12 TO WASTE OR TO WASTE NOT

Since Covid-19, there is a greater awareness and conscientiousness about food waste and it's impact on the environment. With 3 in 10 Spanish "doing more" waste reduction since Covid-19 (+2% since May). We are also seeing too though, a growing tension emerge around packaging as safety is likely to take precedence for many in making their food choices.



32%

of Spanish adults say that the environmental impact of the food that they buy is more important now
Bord Bia Indicators Barometer

33%

of Spanish adults say that reducing packaging and plastics in the food and drink that they buy is more important now
Bord Bia Indicators Barometer



https://foodprint.org/issues/the-problem-of-food-waste/

BORD BIA Thinking House

#12 WASTE NOT…

DIY for waste control..kits, hacks for batch cooking and storage are all opportunities to engage with a more self-sufficient consumer.

With growing concerns around food waste and a growing emphasis on both growing your own and having control over how food is made, we are seeing growth in DIY fermentation kits for Kombucha and Kefir and bread to name but a few.

15%

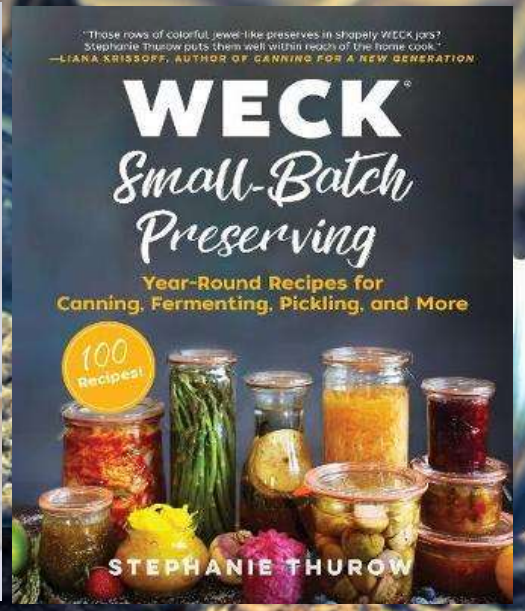
of Spanish adults say that they are doing more batch food storage, with no change since May
Bord Bia Indicators Barometer, Oct 2020

35%

of Spanish adults say that it's more important now that the food and drink they buy has a long shelf life
Bord Bia Indicators Barometer



www.pexels.com
Vicky Tran



This type of small batch DIY preserving could be something that we see grow into the future especially given nutritional density these types of products promise.. Perhaps there is a space for alcoholic and non dairy beverages to engage here.

www.stylus.com

BORD BIA Thinking House

Singkham at www.pexels.com

#12 WASTE NOT…

With surplus produce emerging as a result of closure of many restaurants and food service outlets, retailers are stepping up to the plate to support growers and mitigate waste.

With restaurants and fast food outlets closed, potato businesses saw a surplus of produce normally used in chip production.

To help manage this, Tesco, partnered with Branston, a potato supplier business, to take this extra stock into the retail market, branding the produce the "Perfectly Imperfect Potatoes".

With consumers interested in the reduction of food waste, coupled with the desire to support growers, we might see more partnership initiatives emerge in the future.

Mintel 2020



Singkham at www.pexels.com

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#12 WASTE NOT…

With surplus produce emerging as a result of closure of many restaurants and food service outlets, retailers are stepping up to the plate to support growers and mitigate waste.

Auchan Retail in Portugal has established a partnership with Too Good to Go, an app that is designed to combat food waste.

Users of the app buy ”Magic Boxes” for €3.99 per unit and pick them up at service counters.

There are 10 types of boxes with yoghurts, cheeses, ham, bread, snacks, cold meals, sandwiches and juices.

#12 WASTE NOT
Rethinking ..reuse..

With the closure of most restaurants and bars that stocked Chicago's Revolution Brewing's flagship Anti-hero IPA, they found themselves in a predicament.

Rather than dump the beer, Revolution teamed up with Chicago's CH Distillery to create a first: Malort made from beer.

The product, which went on sale in mid-June at Revolution, CH Distillery and Binny's, pairs two modern Chicago icons: the city's top-selling craft beer and the city's most iconic spirit, an intensely bitter liqueur that doubles as a civic badge of pride.



www.flickr.com

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Thinking House

Singkham at www.pexels.com

Indicators

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#12 Waste Not...

Consumers are using strategies to make their food go further and cut down on waste

Implications for Irish Food & Beverages:

- Brands can be part of the solution & help consumers make their food go further
- There may be an increased emphasis on the shelf life of produce
- ‘Waste-Less’ may be a way to demonstrate value beyond price
- Packaging innovations may well have to focus on storage solutions
- Sustainability messaging may well have to shift into ‘making food last’ messages
- Consumers may need creative ways to elevate our product’s leftovers

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Photo by Joshua Hoehne on Unsplash

Indicators

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#13 Chameleon Living.

How consumers are coping with the blurring of work and home through hidden behaviours



Photo by cottonbro from Pexels

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KateSade@unsplash.com

#13 Chameleon Living is not for every work culture

While working from home was at the outset a dream for many, different views have emerged the more we have experimented with it, which would suggest a hybrid world is more likely to be the format of the future. This does likely open the door longer term to differing food occasions, which food and drinks companies could be tapping into.

Looking at some CEOs from around the world differing views are manifesting themselves:

Reed Hastings, Netflix Cofounder

"No, I don't see any positives", he told the Wall Street Journal. "Not being able to get together in person, particularly internationally is a pure negative"

Satya Nadella, Microsoft CEO

"When you are working from home, it sometimes feels like you are sleeping at work", citing the exhaustion of virtual meetings

Tim Cook, Apple Boss

"There are some things that actually work really well virtually," he said, but "remote working can hamper creativity and is not like being together physically"

Sundar Pichai, CEO of Google parent, Alphabet

"I see the future as being more flexible"

Irish Times, 10th October 2020

32%

of Spanish adults miss going to work with their colleagues

Bord Bia Indicators Barometer, Oct 2020

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#13 Chameleon Living.. is not for everyone

A recent global study highlighted how Millennials struggle most to work from home during Covid-19 and so of all the cohorts, are likely to desire a return to the office*

During the pandemic, **Millennials experienced significantly lower levels of vitality than other generations** and significantly lower levels of wellbeing than Boomers.

Despite usually perceiving significantly higher levels of supervisor support at work than Generation X, **Millennials still experienced high levels of burnout** (significantly higher than Boomers).

During the pandemic, **Millennials report greater overall stress and cognitive stress** (significantly higher than the other generation groups).

***These initial findings comprise the first part of a Longitudinal Study and were based on online surveys of 422 employees in 41 different countries, conducted by Prof Audra Mockaitis at the School of Business at Maynooth University and Kingston Business School, looking at how different age groups have fared working from home during the pandemic**



"What surprised us was that Millennials who are characterised as technologically savvy are actually having the hardest time coping with the pandemic. All of our respondents reported similar degrees of disruption to their lives as a result of COVID, but members of other generations, particularly 'Boomers', appear to be getting on with their lives better than Millennials, despite having relatively more responsibility."

Gustavo Fring
www.pexels.com

#13 Chameleon Living

With more remote working – new lunch opportunities are being created for food and drinks businesses.

As people work from home, more businesses are tapping into new opportunities. Uber Eats have just launched a lunch voucher programme allowing businesses to customise their meal plans for remote employees and customers. These vouchers can also work for large scale virtual events.

41%

of Spanish workers are now working from home in some capacity that would not have been the case pre Covid-19

Bord Bia Indicators Barometer, Oct 2020

Brazilian catering company Box Gastronomy, launched a happy hour kit delivery service designed exclusively to serve virtual professional interactions during quarantine. The kit contains beer and six different appetisers, delivered to staff members participating in the virtual catch up.



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https://www.covidinnovations.com/home/10062020/uber-eats-launches-new-vouchers-program-which-lets-you-buy-remote-lunches-for-people-in-your-virtual-meetings

Indicators

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#13 Chameleon Living.

How consumers are coping with the blurring of work and home through hidden behaviours



Photo by cottonbro from Pexels

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#14 Delivery Fatigue.

How consumers are opting-in and out of food delivery

BORD BIA Thinking House

Photo by cottonbro from Pexels

#14 Delivery *Fastracks*

Covid-19 has introduced many new forms of delivery. In early phases of Covid-19, many businesses did struggle with delivery but as time has gone on many businesses have adapted, responded and are now delivering in many new and different ways.

For some delivery businesses, the numbers now speak for themselves. Deliveroo and Just Eat have powered ahead as two of the fastest growing brands in the UK during 2020 and have truly seen their growth accelerate as a direct result of Covid-19 according to Kantars Top 75 BrandZ report. The value of the food delivery brands in the brands Top 75 has risen by 75% since 2019.

While people crave going out to dine once more, we are likely to expect delivery to be different in the future and with much innovation in the channel, consumers are likely to expect a greater range of offerings to address many differing dining needs from Michelin star to health specific offerings, it will be interesting to see where the opportunities land suffice to say the guaranteeing of a safe delivery is likely to become part of every delivery brand story.

24%

of Spanish adults are getting more meal deliveries, +1% vs May 2020

Bord Bia Indicators Barometer

68%

of Spanish adults miss eating out in formal restaurants

Bord Bia Indicators Barometer, Oct 20

Kai Pilger @ unsplash.com

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#14 Delivery meets safety

There's a role for brand partnerships in creating a unique approach to having a distinctive and safer approach to food delivery and collection.

6%

Increase in takeaway for collection since May
Bord Bia Indicators Barometers, Oct 2020

In a bid to counteract fears around safety when it comes to food delivery and to encourage good hygiene, Lush and Deliveroo have partnered in Dubai.

Lush have created a soap which is a self-timed single use soap which dissolves after 30 seconds. Deliveroo deliver the soap with the takeaway order.

www.stylus.com

deliveroo

LUSH FRESH HANDMADE COSMETICS

BORD BIA Thinking House

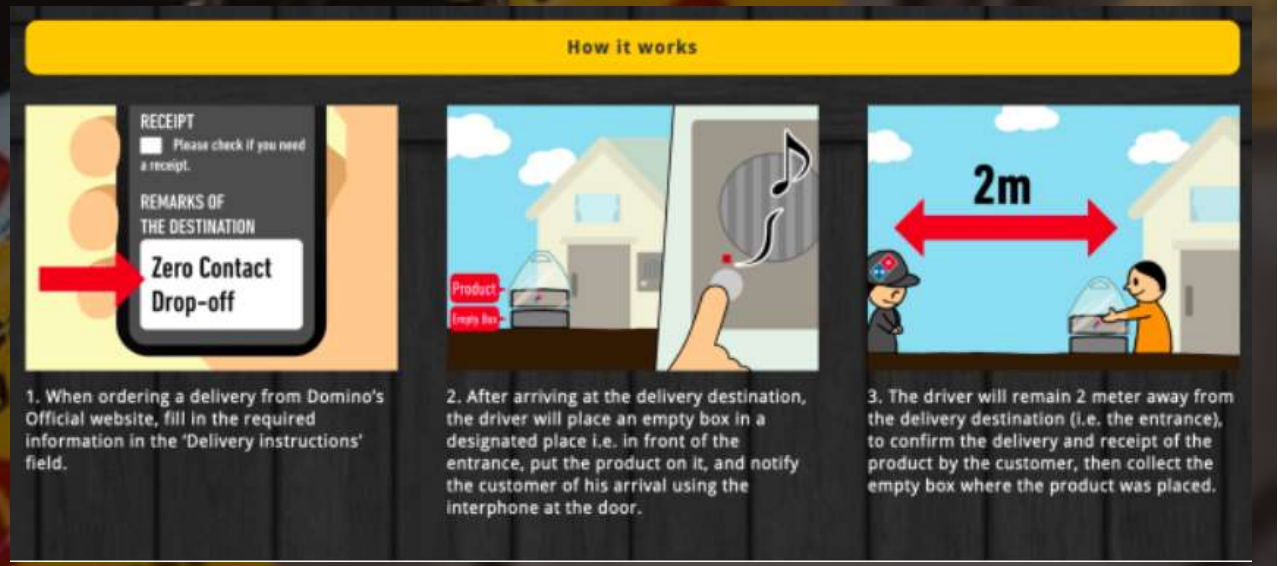
#14 Delivery meets safety

And for some businesses that means “no delivery” i.e. Zero contact drop offs.

Domino’s Pizza in Japan have rolled out a zero contact drop off.

While Pizza Hut has created a similar offering, Domino’s goes a step further confirming the order is received.

Domino’s has also detailed a list of preventative measures being taken by staff to prevent the spread of Covid-19, including temperature checks at the start of each shift, washing hands, gargling, disinfecting hands and fingers thoroughly, and disinfecting the customer area and restrooms with alcohol every two hours. Drivers are also being instructed to disinfect their hands before and after each delivery, and wear masks whenever possible.



https://japantoday.com/category/national/domino%E2%80%99s-pizza-hut-introduce-'zero-contact'-delivery-service-amid-virus-fears

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#14 Delivery Fatigue opened the door to the meal kit market

At the outset of Covid-19, as many online grocery retailers struggled to cope with demand, consumers had to seek out alternative meal solutions, meal kits were possibly one beneficiary of this.

Correspondingly, the ready meal markets is likely to see sales fall off by 3% this year. The surge in demand for home cooking and ready cooked meals further challenged the ready meal market.

Meal kit subscription delivery companies have profited from the COVID-19 situation, as consumers either returned to them or created new subscriptions. Hello Fresh Group increased its full-year 2020 revenue growth guidance on a constant currency basis from previously between 55% and 70% to now between 75% and 95%. Mintel October 2020

It's worth noting that meal kits had however been suffering a retention problem pre Covid. Covid provided novelty to engage with this channel at the outset, however as we enter recession with meal kits coming at a premium, future success will need to offer either an elevated customer experience or some new novel experience.

As people are enjoying cooking more but with a slight wane as we move through Covid, perhaps meal kits could be part of the solution as busy lives take off once more.

30%

of Spanish adults are doing more cooking from scratch, -9% since May 2020

Bord Bia Indicators Barometer, Oct 2020

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#14 Delivery Fatigue opened the door to the meal kit market

Creating partnerships with food service companies is one way to future proof the meal kit markets and to create points of difference in delivery, it is also a way to evolve perceptions of a brand and create talkability.

Nando's partnered with the healthy recipe box brand Mindful Chef for a limited period.

Mindful Chef, the UK's leading healthy meal kit company have reported a 452% increase in sales since the coronavirus outbreak, demonstrating consumer appetite for healthier options.



https://www.womenshealthmag.com/uk/food/healthy-eating/a32821350/nandos-mindful-chef/

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#14 Delivery Fatigue ..cooking fatigue..

Fear, fatigue and hyberbolic discounting
Time to call the Chef?

As people tire of cooking and people still want to treat themselves, where they are not yet feeling the pinch, they are calling in “the chef”.

Personal chefs are seeing sales boom as the coronavirus pandemic devastates the restaurant industry. Mounting restaurant closures tied to the pandemic could push more out-of-work chefs to start their own businesses.

“A lot of people are looking at the personal chef and in-home dining experience as a great alternative to the dining experience,” says Brian Driscoll, co-founder of Arizona-based personal chef company Driscoll Cuisine and Cocktail Concepts. And as people chose to level down their celebrations to smaller affairs due to Covid-19, the demand appears to be growing.

Tapping into consumers' desire for new styles of fine dining, UK start-up APT is offering professional chef-cooked meals to small parties in private rooms.

Canvas 8, October 2020

7 in 10

Spanish adults miss dinner parties and eating out in formal restaurants

Bord Bia Indicators Barometer, Oct 2020

sebastiancoman@unsplash.com



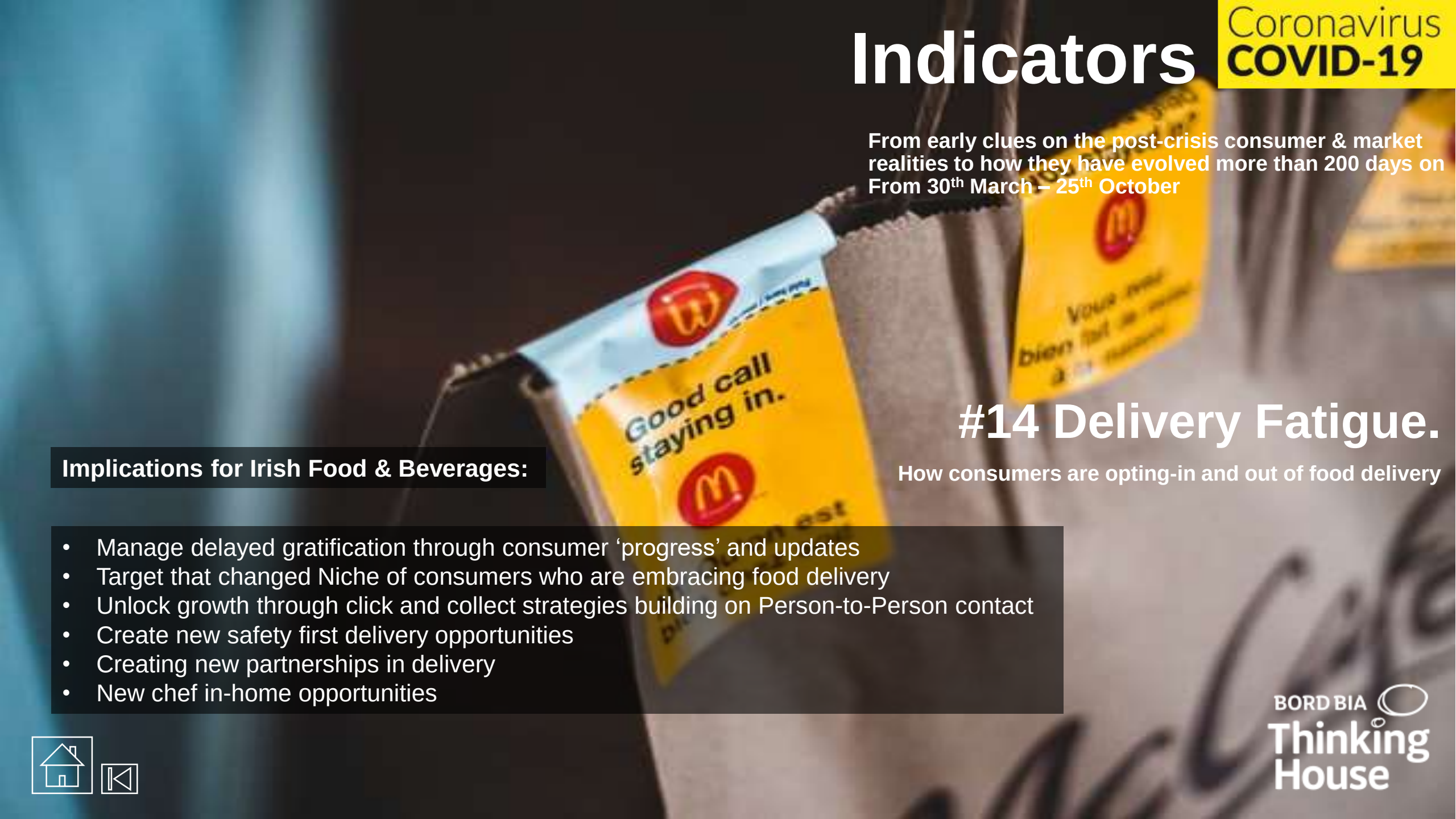
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https://www.cnbc.com/2020/10/07/coronavirus-new-demand-for-personal-chefs-as-restaurant-industry-lags.html?mc_cid=e4c074095a&mc_eid=a9c394adb3

Indicators

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#14 Delivery Fatigue.

How consumers are opting-in and out of food delivery

Implications for Irish Food & Beverages:

- Manage delayed gratification through consumer ‘progress’ and updates
- Target that changed Niche of consumers who are embracing food delivery
- Unlock growth through click and collect strategies building on Person-to-Person contact
- Create new safety first delivery opportunities
- Creating new partnerships in delivery
- New chef in-home opportunities

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Indicators

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From early clues on the post-crisis consumer & market realities to how they have evolved 6 months on
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#15 Championing Community.

How society is adapting and working together to provide support during Covid-19



Photo by cottonbro from Pexels

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#15 Championing Community

Recent years has seen much divide across society with the rise in populism, the far right, “leavers”, “remainers”, the labels of division are only but growing. Covid-19 has further served to highlight divisions across different societal groups with one of the latest emerging in the North/South divide arising from the UK government’s Covid regional management approach. The results in the US election are also testament to the growing divisions within American society.

By contrast however we have also seen the spirit of togetherness emerge during Covid-19 with people coming together to sing on balconies, others setting up groups to support the elderly, whilst others again are actively going out to champion and support those who are taking on the challenges the virus presents: the heroes that are the medics and carers.

There has also been strong cause to champion those who are the unsung heroes: the train drivers, the delivery drivers to the retail workers to the cleaners in the hospital environments who are also at the cold face. In some ways, Covid-19 has crossed the social divide to recognise the workers that in many ways are typically hidden from public view, who quietly go about their work and are doing so now at the most challenging of times. Many of these people are employed precariously and there is a growing understanding of a need to protect these people.

And so this indicator is a reflection on togetherness and how amid the challenges of Covid-19, there are every day people who are rising above the challenges to create that sense of support, community and hope. We call this indicator Championing Community.

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#15 Championing Community: altogether now?

Food producers and retailers are playing an integral role in the community right now.

With Covid fatigue, societal views are becoming more fragmented about ways to manage the virus and expected social behaviours.

As the numbers continue to surge there are significant concerns about the level of restrictions and the challenges the health care system may face as a result. These concerns vary by age and by region.

In parallel, people are also concerned about the economy with 9 in 10 concerned about the long term impact of the economy. There is also a belief that the continuation of normal life and services is important with supermarkets and food producers playing a highly valued community role.

Managing the various societal tensions in the months ahead will be important and a key consideration for food and drinks brands and brand owners as to how they communicate amongst the community and at large.

8 in 10

of Spanish adults feel the supermarkets and food producers are deemed critically important to continue their normal operations - more so than schools and delivery services (post).

Bord Bia Indicators Barometer, Oct 2020

73%

of Spanish adults feel the fishmongers are deemed critically important to continue their normal operations- more so than schools and delivery services (post)

Bord Bia Indicators Barometer, Oct 2020

47%

of Spanish adults believe the restrictions don't go far enough

Bord Bia Indicators Barometer, Oct 2020

85%

of Spanish adults are very or extremely concerned about the ability of the health service to cope...

Bord Bia Indicators Barometer, Oct 2020

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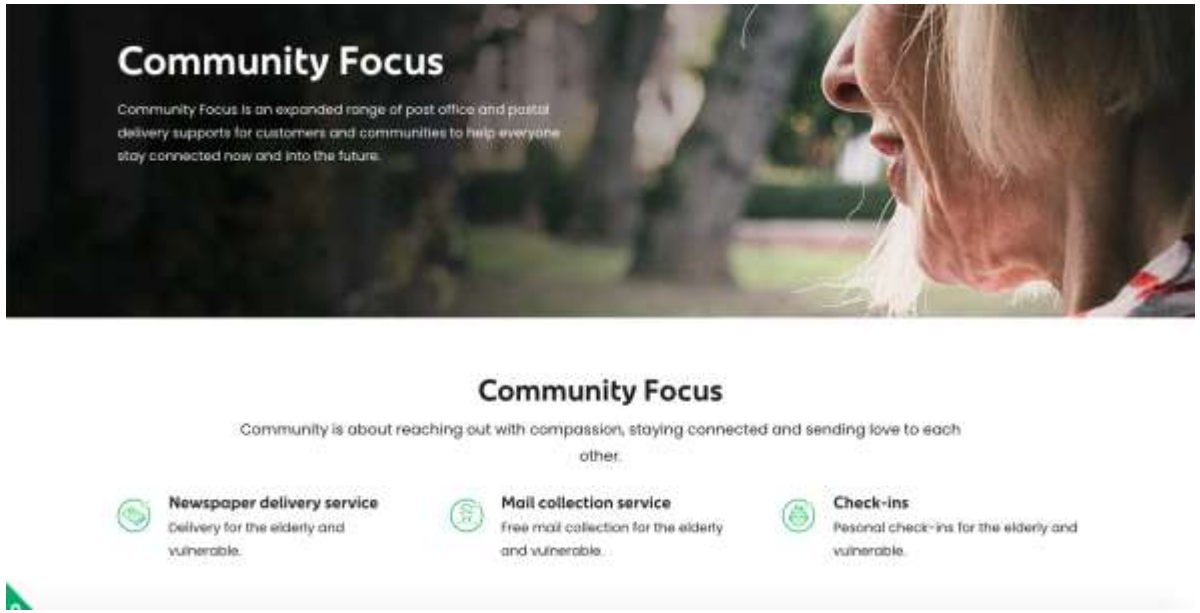
#15 Championing Community

How are food and drinks brands responding?

Many food brands and businesses have responded with differing supports from providing care packs to the healthcare workers, additional income to the retail workers to lunch programmes for children in schools.

We have even seen businesses pivot to help challenges that have emerged during the crisis for e.g. Formula 1 making ventilators.

An Post have championed a huge number of social and community initiatives that are innovative, relevant and community focused and have in many ways tapped into the mood of this indicator.



One of the many recent initiatives launched by An Post to help the elderly and those in care homes

Indicators

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#15 Championing Community.

How society is adapting and working together to provide support during Covid-19

Implications for Food & Drink Businesses:

- Consider local social causes to support
- Managing the message is important
- Find ways to engage consumers in being part of the message

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Photo by cottonbro from Pexels

Validators

Coronavirus COVID-19

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Welcome to the Validators section of the toolkit.

Our validators are key measures that measure changing consumer behaviours. We do this through a nationally representative survey of consumers in key markets.

You can use this work to sense check what behaviours are becoming ‘sticky’ and look like becoming long-term permanent changes in consumer behaviour.

About this Research

- As part of the Bord Bia Covid-19 Indicators works, quantitative research was conducted among Spanish adults to understand how Covid-19 has impacted their food and drink habits.

- The research was conducted among n=1,009 nationally representative adults aged 18+ in Spain via an online survey.

- The research was conducted between 27th and 31st October 2020 and follows on from an earlier wave conducted in May 2020.

- The research focused on the following key topics…
  - *Fish/ Seafood and Shellfish behaviours*
  - *General Food and Drink behaviours*
  - *Grocery shopping behaviours*
  - *Health and wellness*
  - *Impact and reaction to Covid-19 in general to date*

- The overriding aim of this project is to identify key behaviours that have emerged during the pandemic that can help Irish food and drink producers adapt and target shoppers and consumers more effectively.



Photo by You X Ventures on Unsplash

Presentation Structure

Coronavirus
COVID-19



BORD BIA
Thinking House



Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

Fish/ Seafood/ Shellfish

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Key Trends – *Fish/ Seafood/ Shellfish*

Coronavirus COVID-19

We see a **shift towards buying more locally sourced** seafood and shellfish coinciding with the **increased importance** among shoppers of **understanding where the seafood comes from.**

→ *Increased importance of Source*

Spanish adults are **buying fish/ seafood/ shellfish from certified sustainable fisheries** more often as a result of Covid-19.

→ *Sustainability credentials*

There has been an **increase in cooking fish/ seafood/ shellfish for known health benefits** during the pandemic.

→ *Nutritional benefits & Experimentation*

Spanish adults are **buying more better quality seafood** than cheaper seafood during the pandemic.

→ *Seeking better Quality*

Buying **frozen seafood has also seen an increase** among Spanish adults since the start of the pandemic.

→ *Stocking up*

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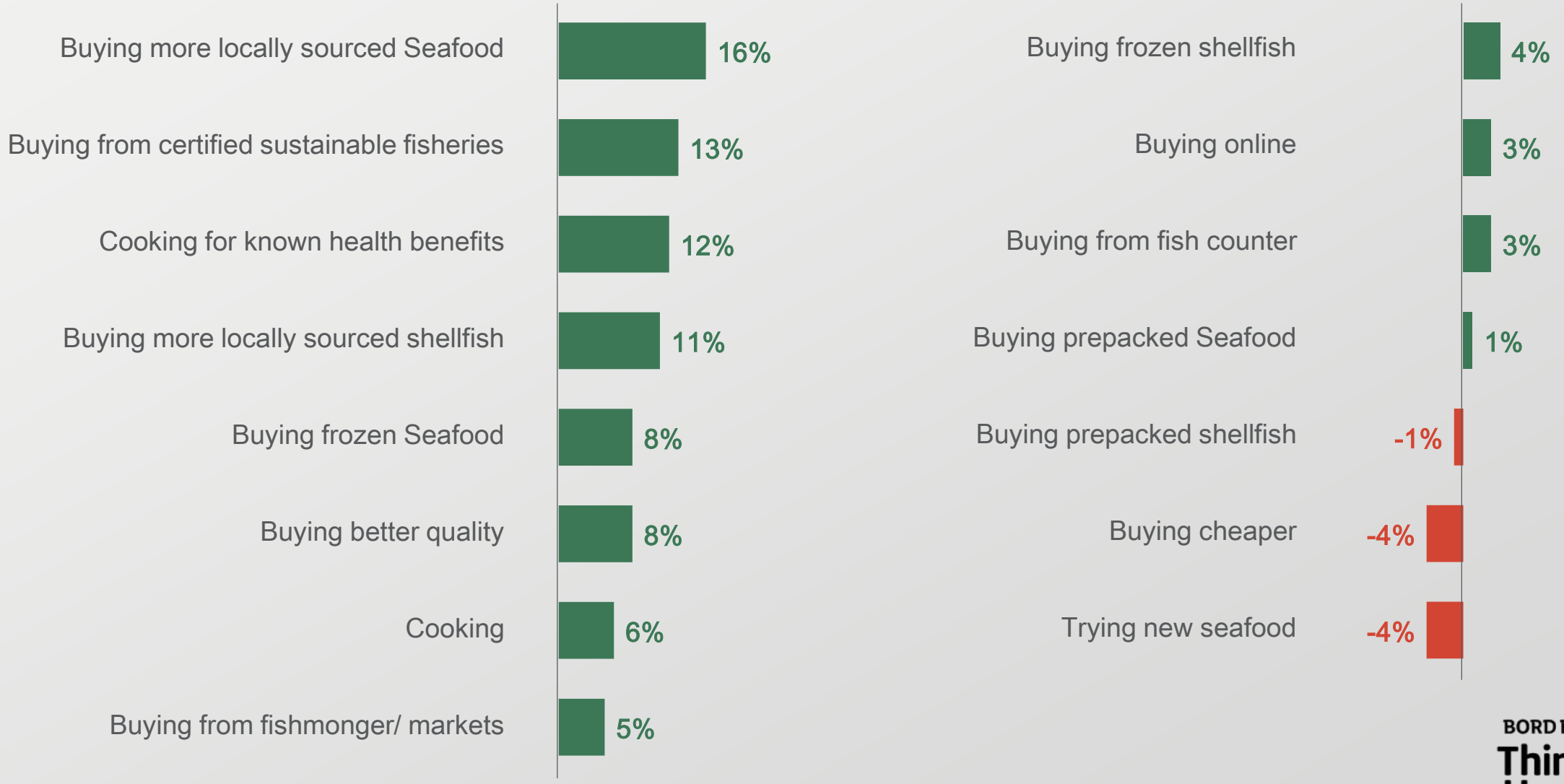
Photo by Florencia Viadana on Unsplash

Fish/ Seafood/ Shellfish– Change since Covid-19

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)

Based on % DOING MORE - % DOING LESS

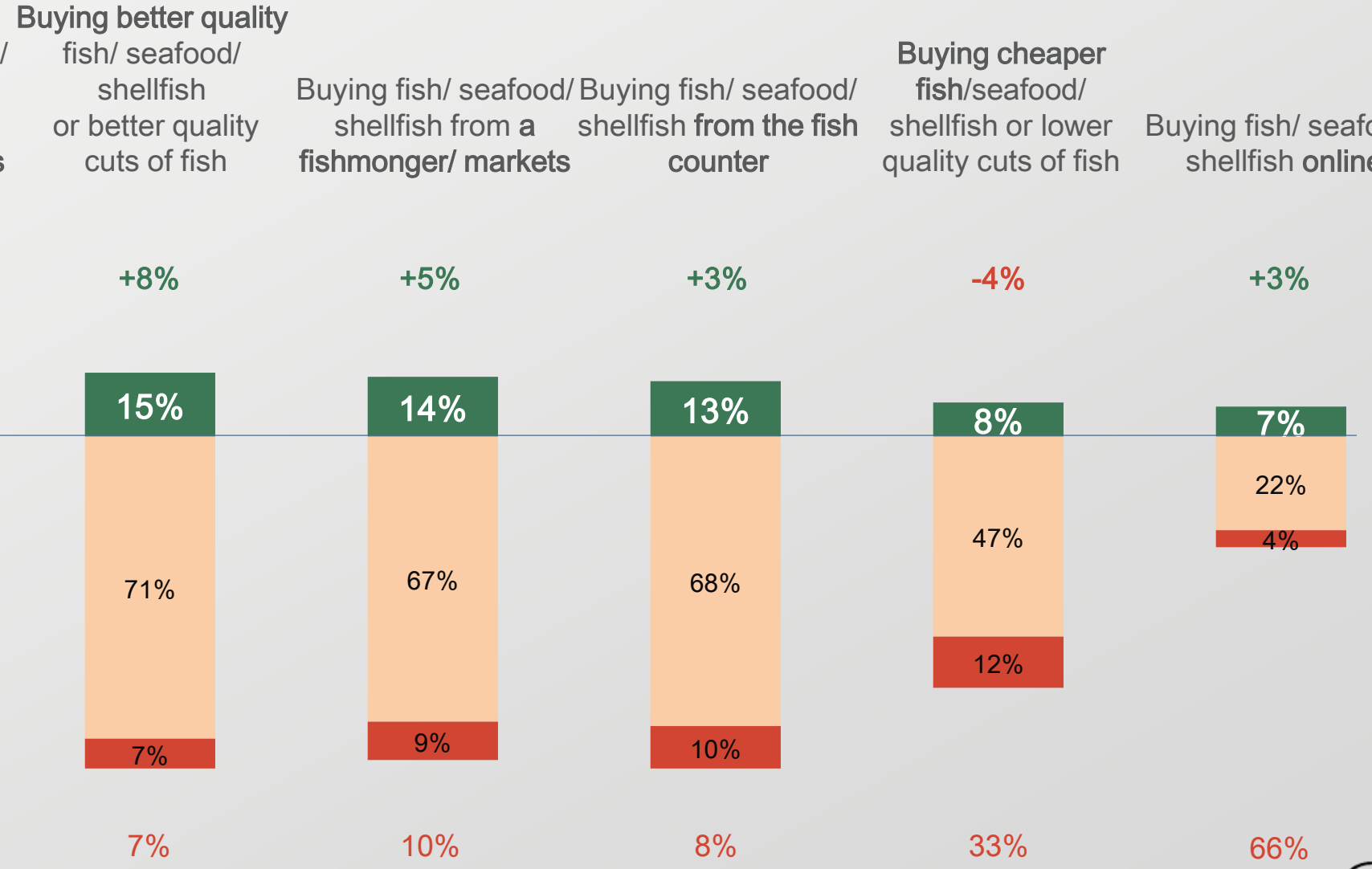


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Behaviour Based

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



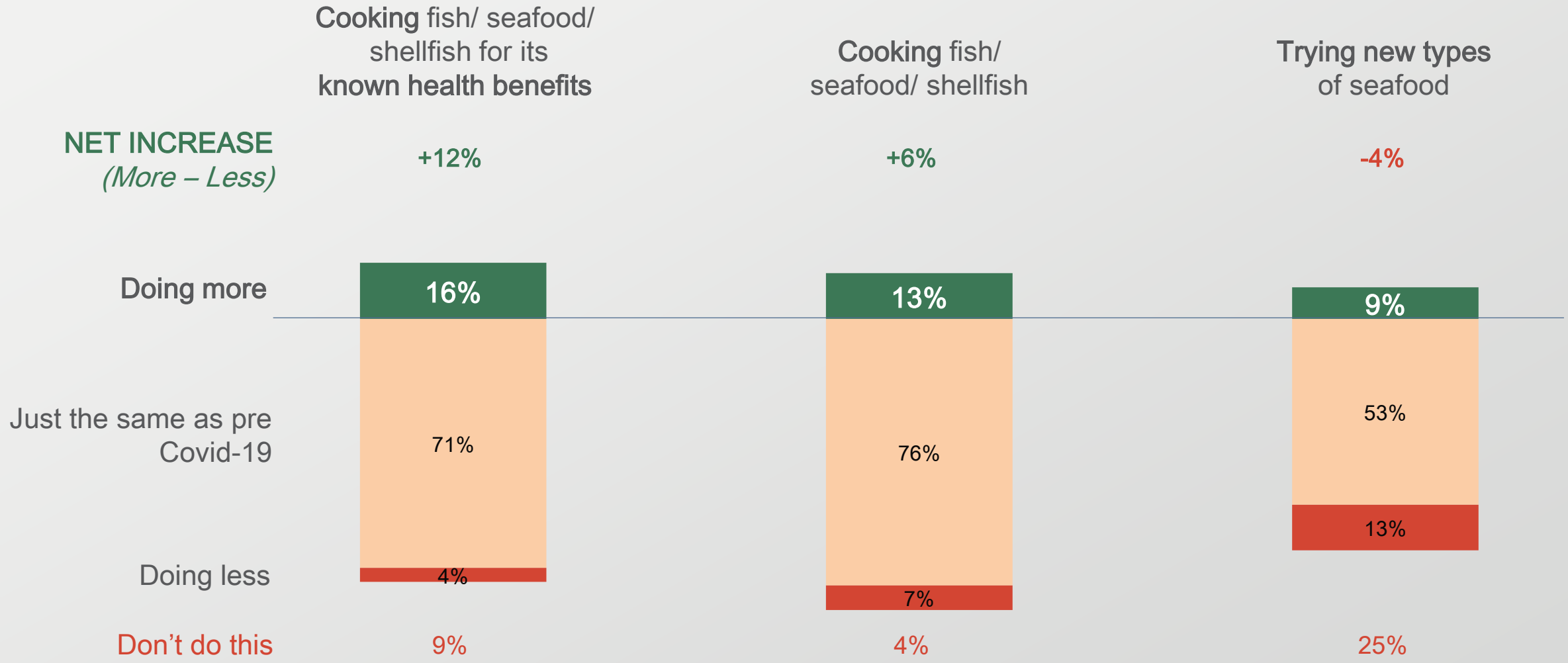
State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Behaviour Based

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



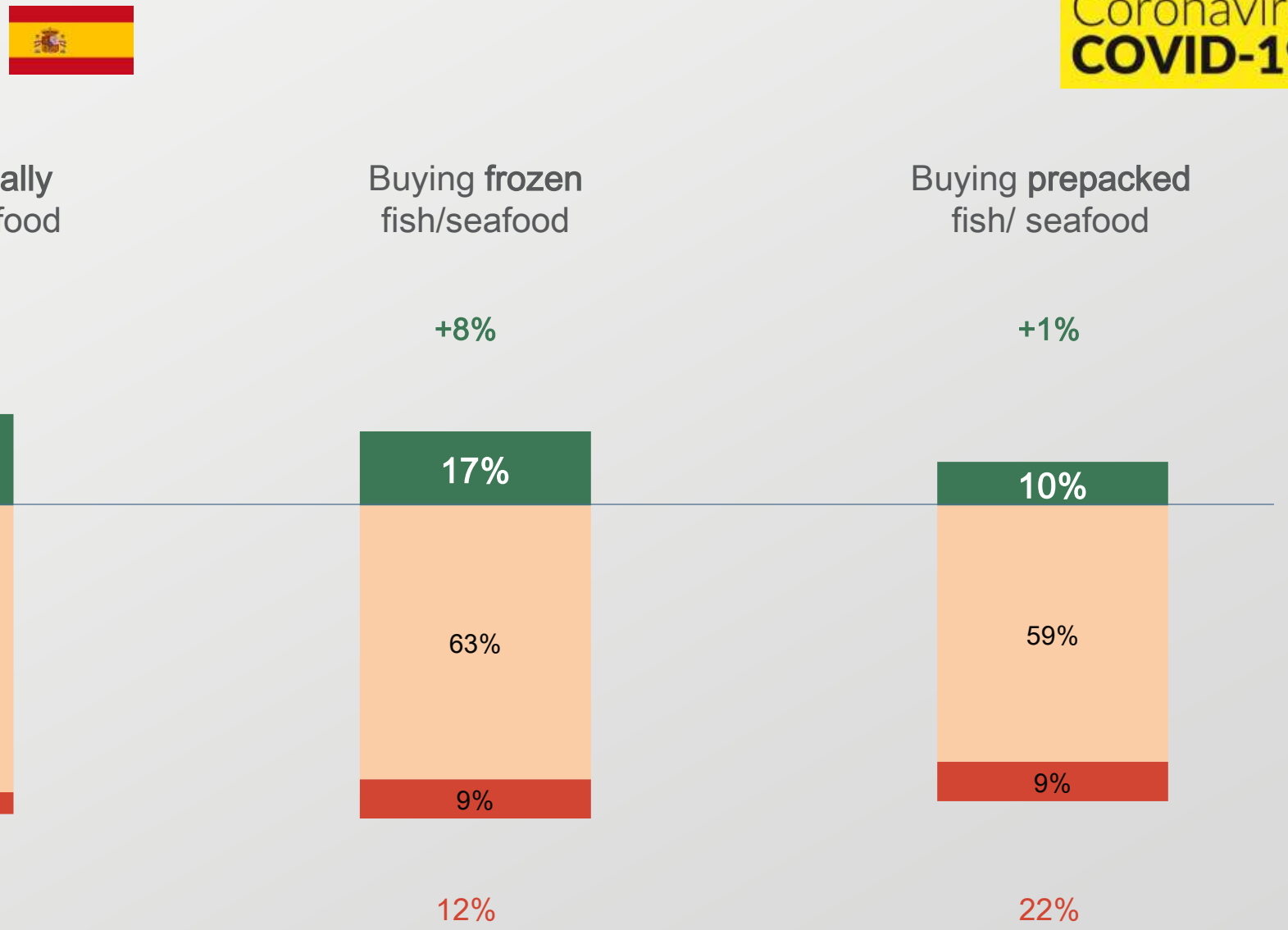
State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Fish/ Seafood Based

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



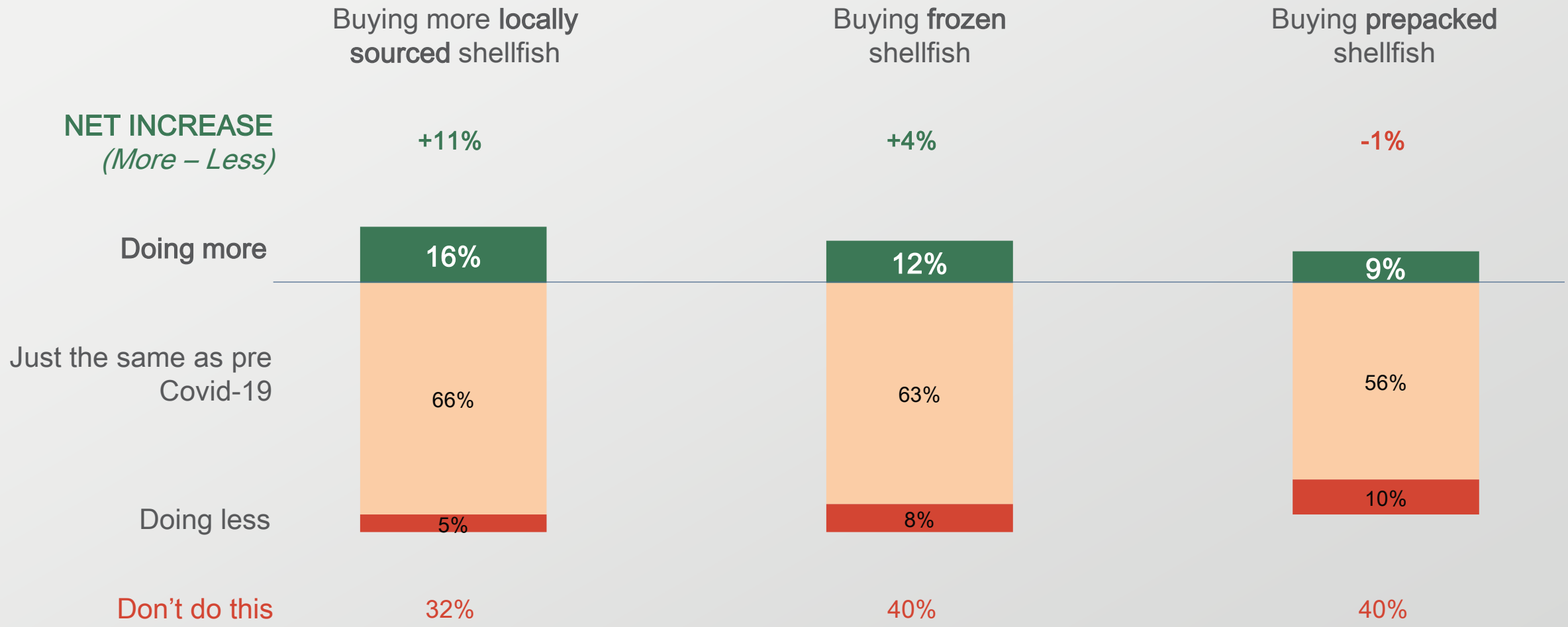
State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

BORD BIA Thinking House

Shellfish Based

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



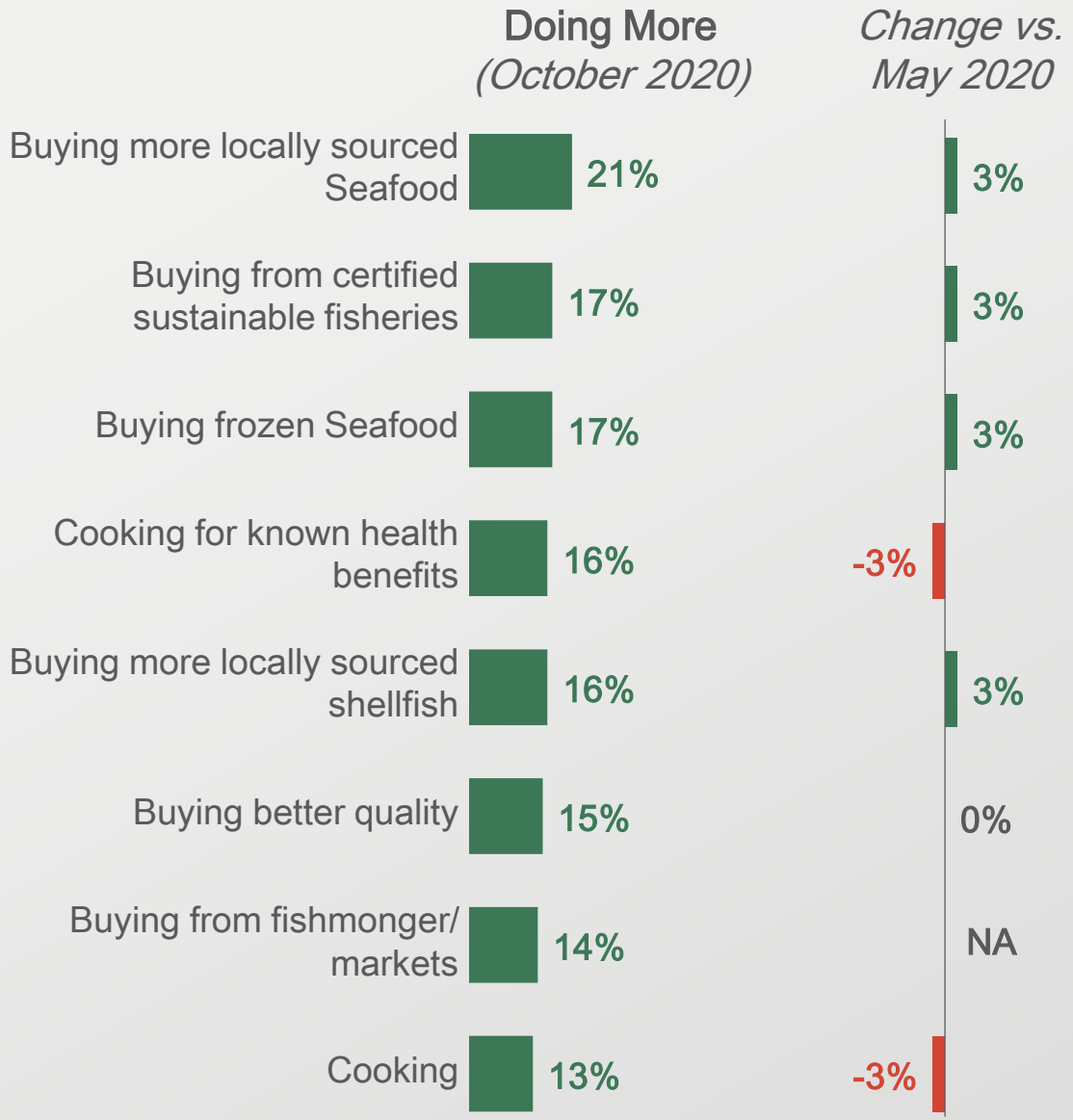
State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

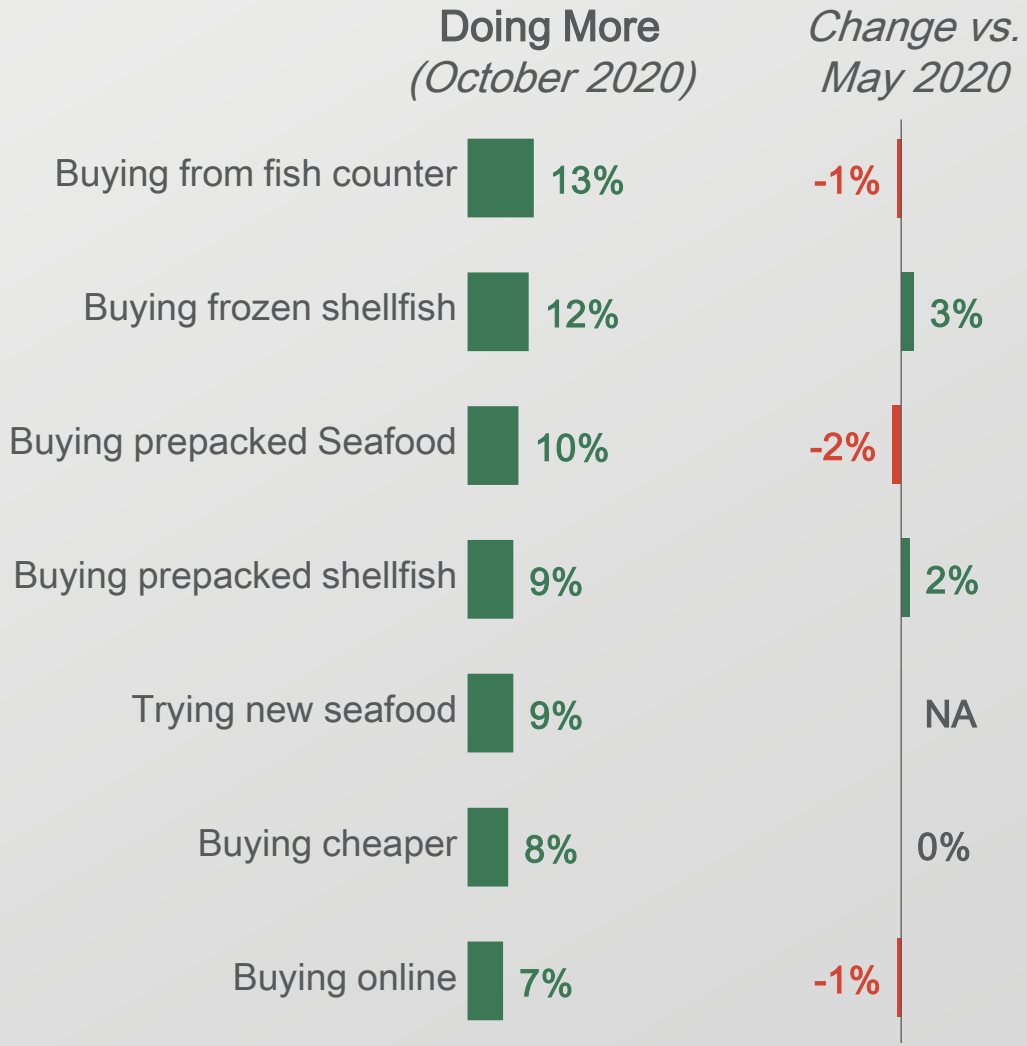
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Fish/ Seafood/ Shellfish– Difference vs. May 2020

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)





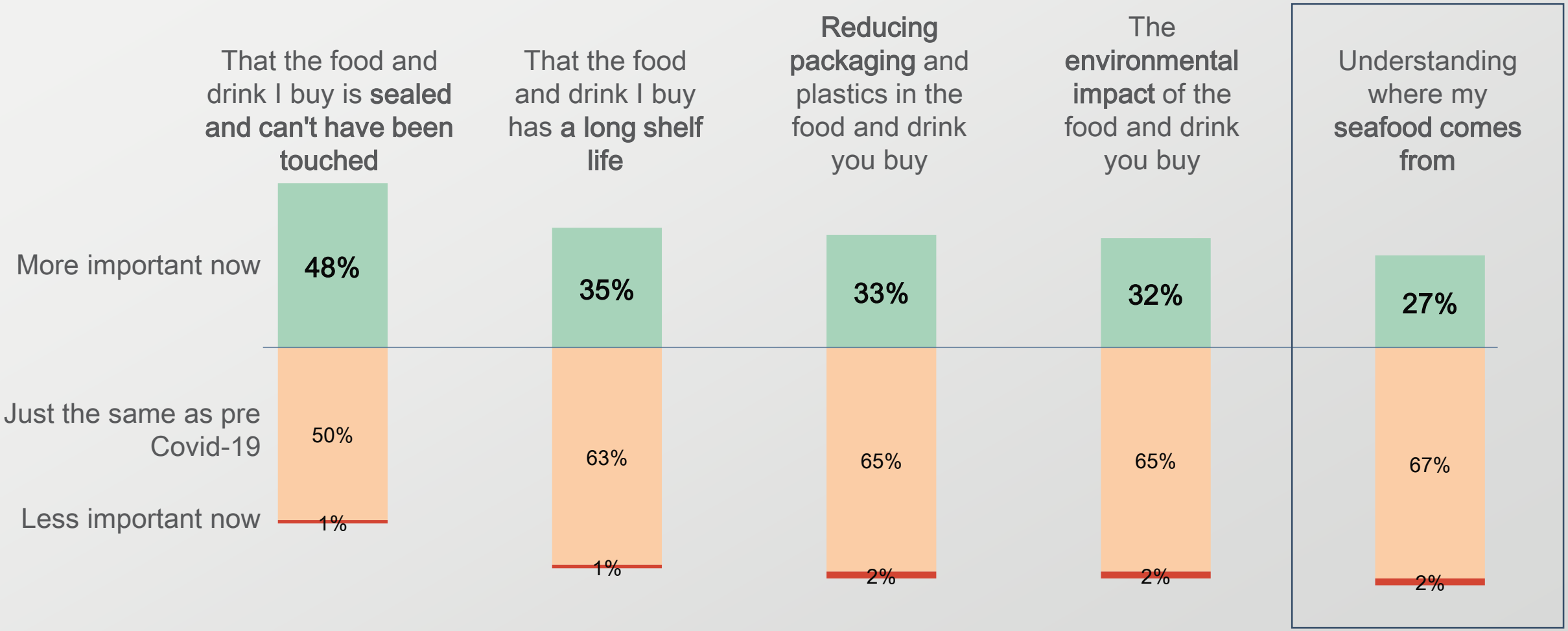
Even since May 2020, local sourcing, sustainability and buying frozen have become more prevalent.

BORD BIA Thinking House

Changing Priorities

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



Almost 3 in 10 Spanish adults claim that understanding where their seafood comes from is more important now as a result of Covid-19, reinforcing the increased behaviour around local sourcing.

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For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.



Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

Food & Drink

BORD BIA
Thinking House

Key Trends – *Food & Drink*

Coronavirus COVID-19

Spanish adults **eating healthier** as a result of Covid-19 with greater emphasis on **choosing immune boosting foods.**

→ *Nutritional benefits & Healthier living*

Spanish adults **are reducing their meat consumption** as a result of Covid-19, a trend that has increased later into the pandemic.

→ *Opportunity for fish as 'better for you'*

Spanish adults **consciously reducing their food waste** more often as a result of the pandemic – again increasing this behaviour the later into the pandemic they go.

→ *Environmental awareness & Sustainability credentials*

An **increase in scratch cooking** is evident as a result of Covid-19. This has fallen back slightly since May 2020 but still significant more prevalent now vs. pre pandemic.

→ *Meal Preparation & Experimentation*

While indulgent behaviours around **baking, having sweet treats and snacking** are more common as a result of Covid-19, these behaviours **are declining** the later we go into the pandemic.

→ *Refocus on Nutritional benefits & Healthier living*

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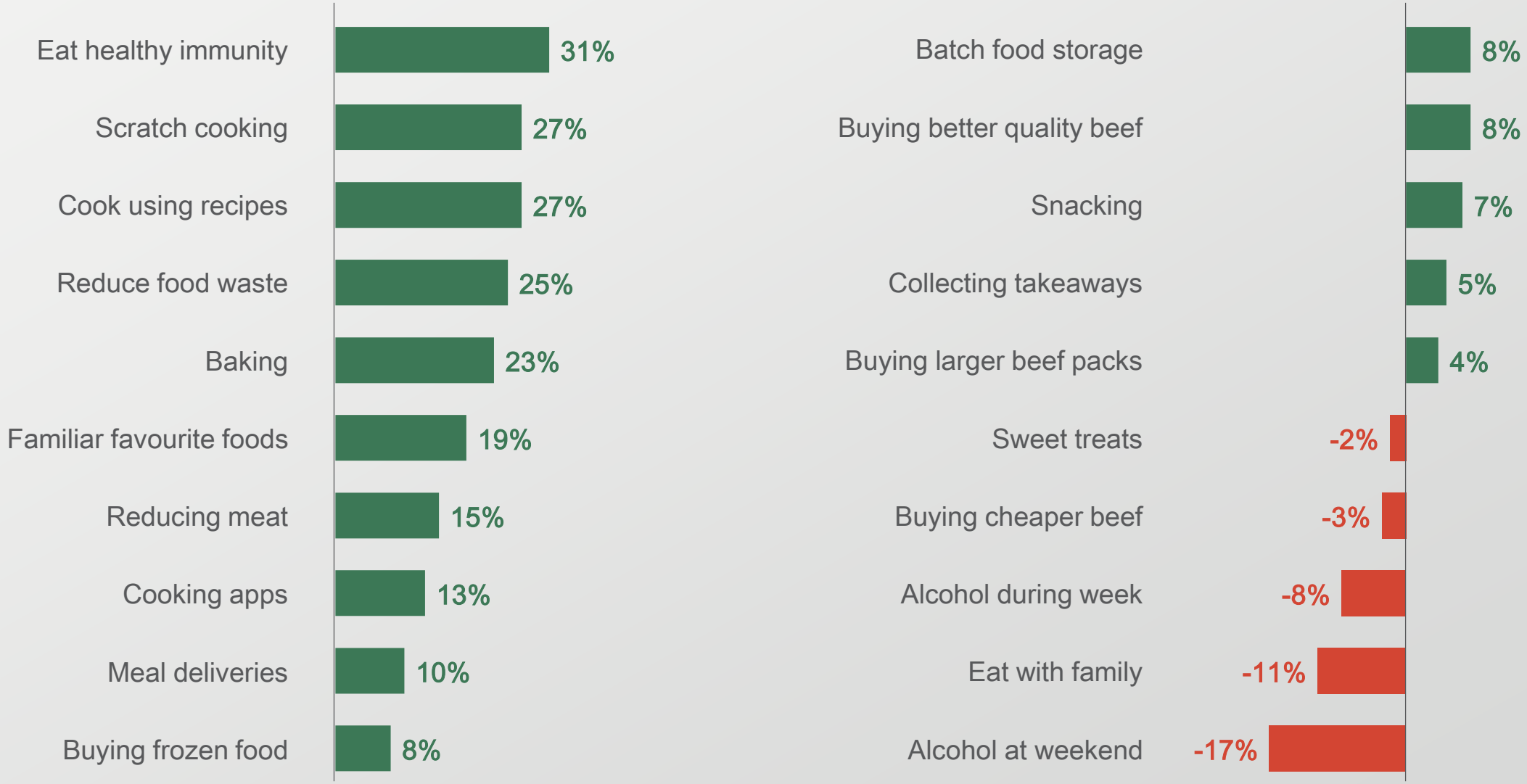
Photo by Jason Briscoe on Unsplash

Food & Drink – Change since Covid-19

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19

Based on % DOING MORE - % DOING LESS



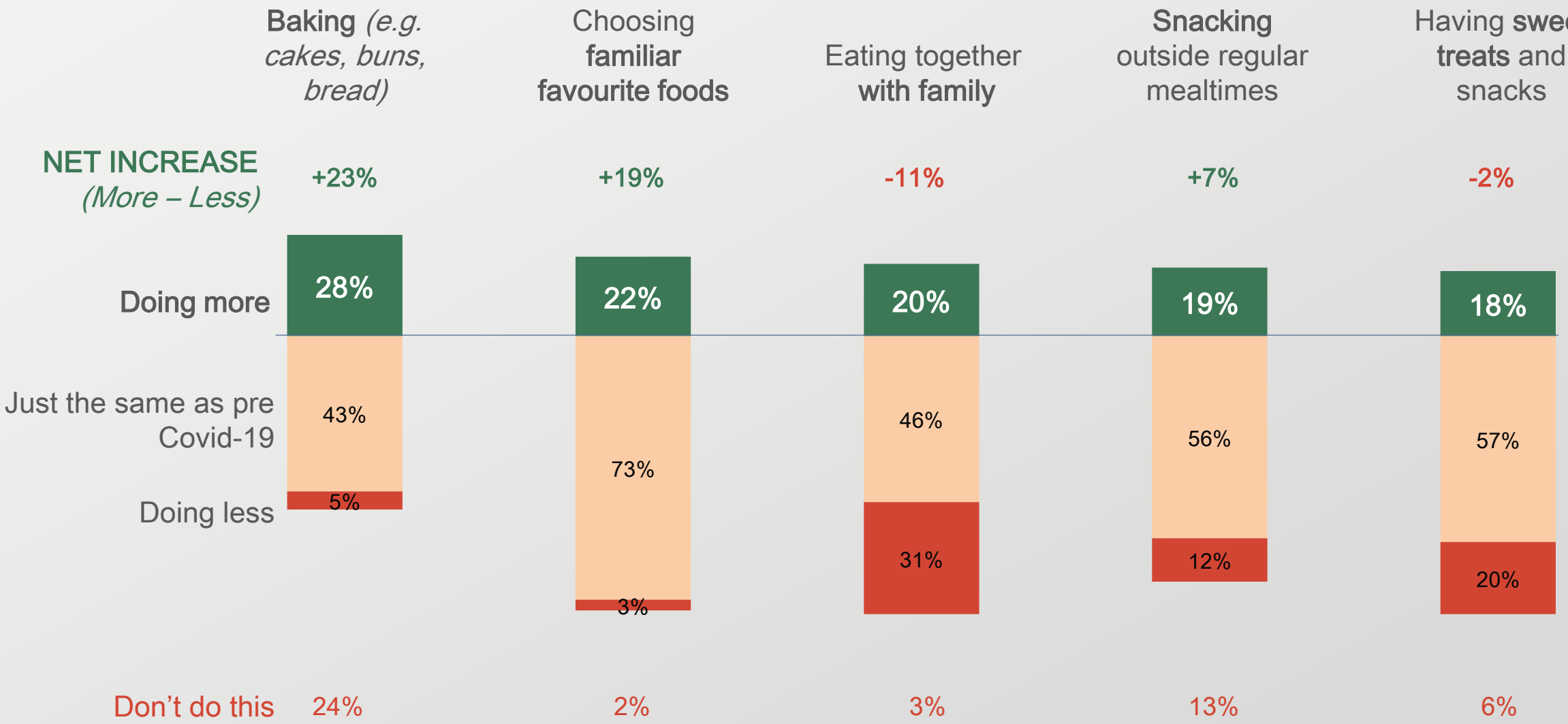
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Food & Drink – Enjoyment Based

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)





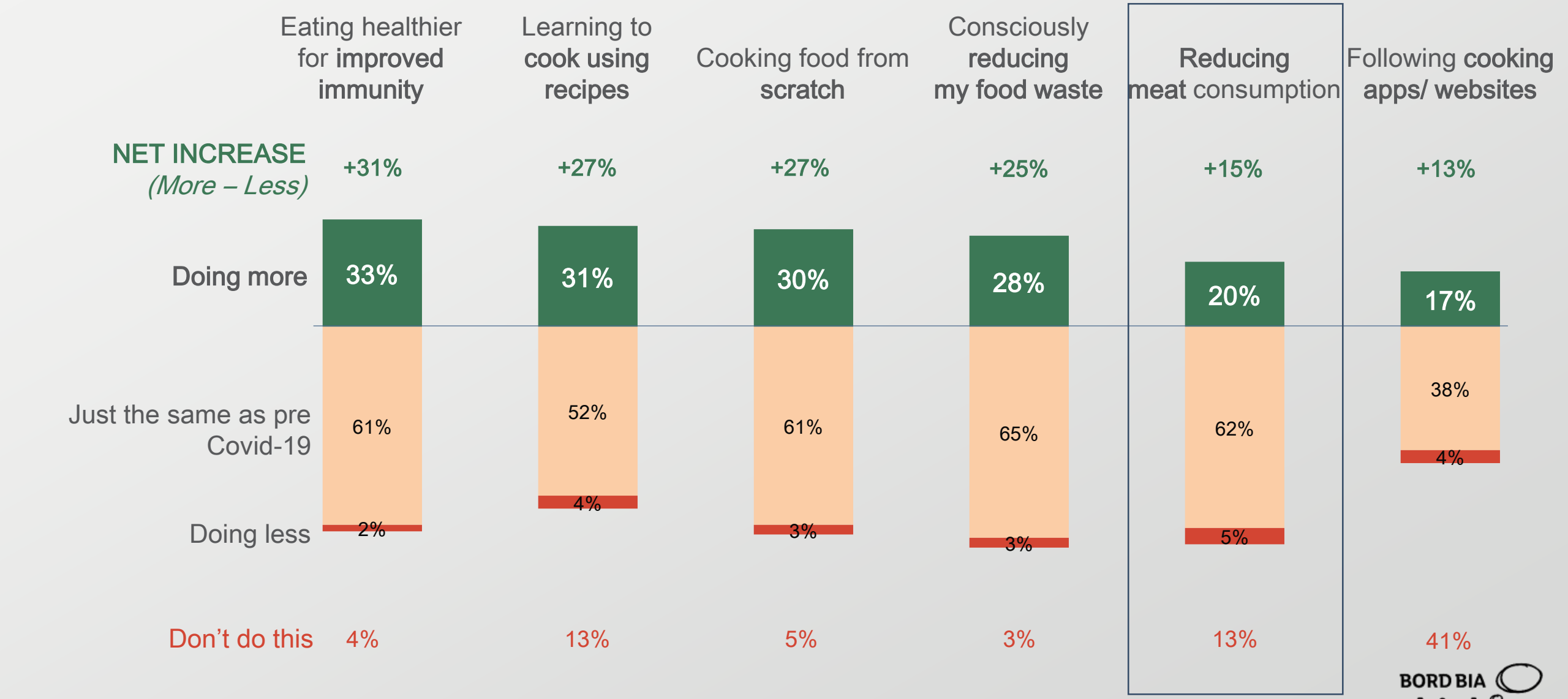
State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Food & Drink – Health Based

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)



State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

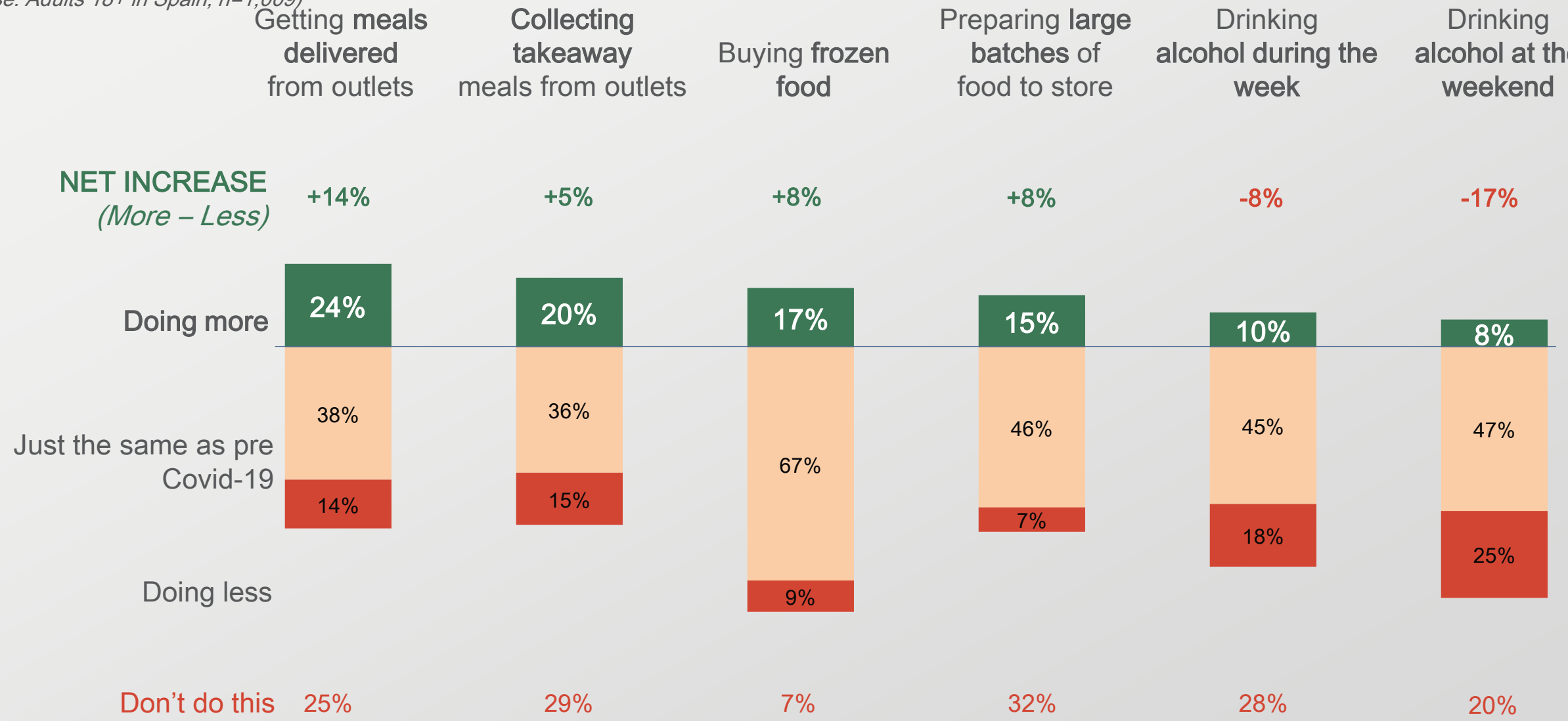
BORD BIA Thinking House

Food & Drink – Behaviour Based

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)





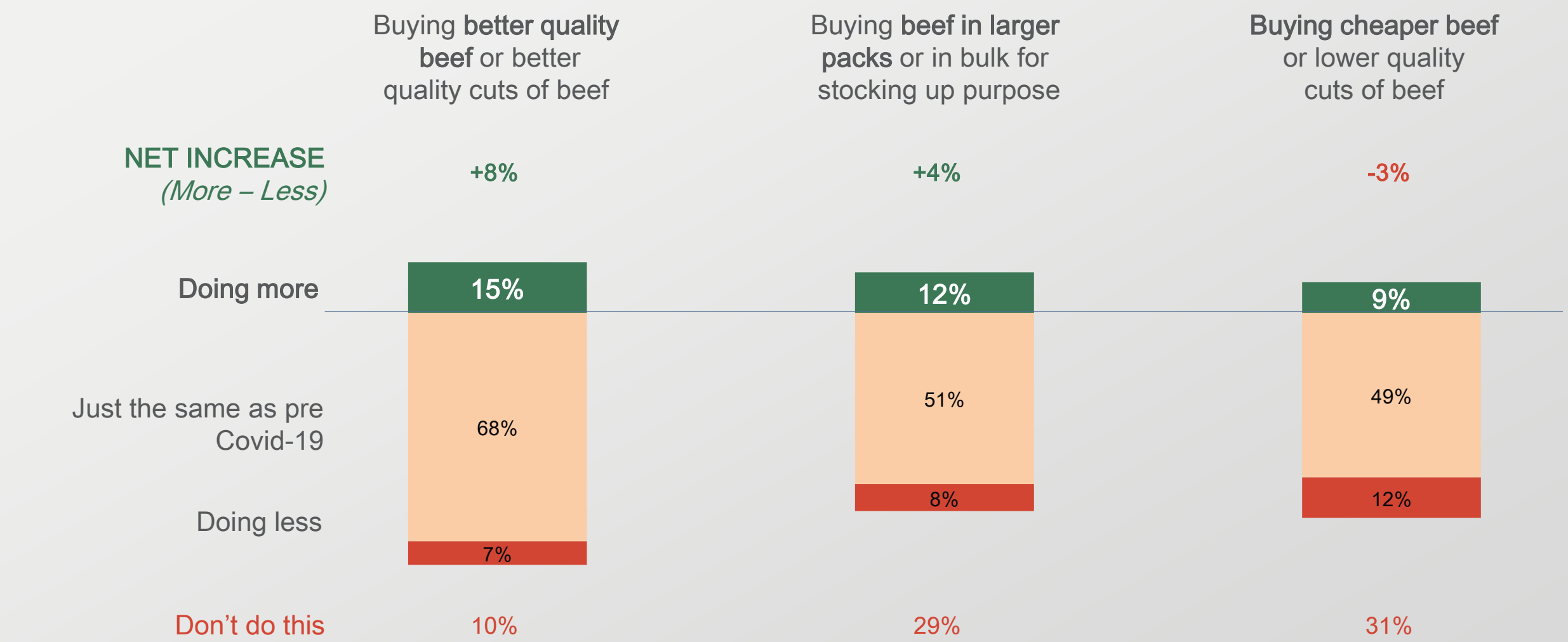
State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Food & Drink – Beef Based

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)



State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

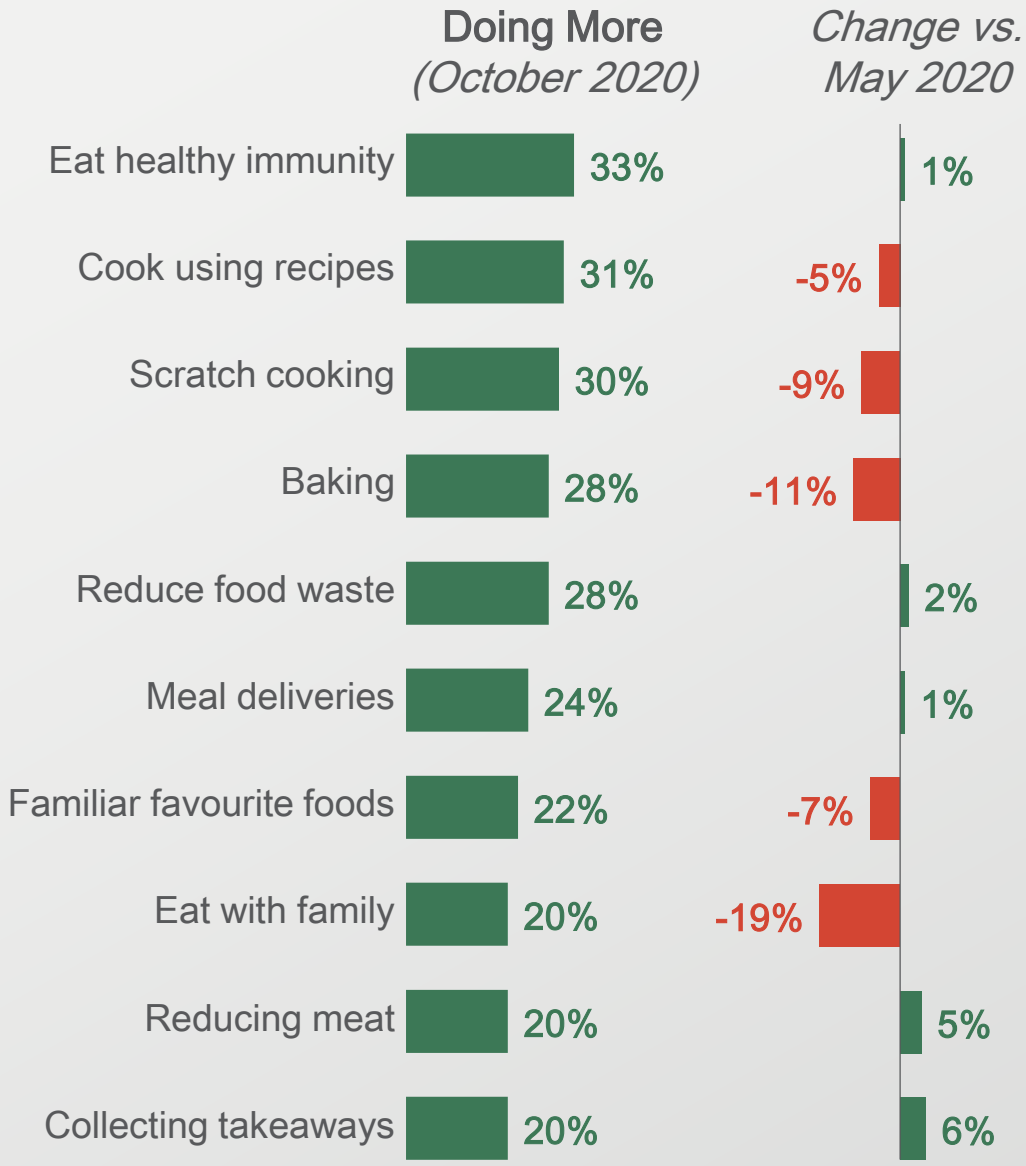
BORD BIA Thinking House

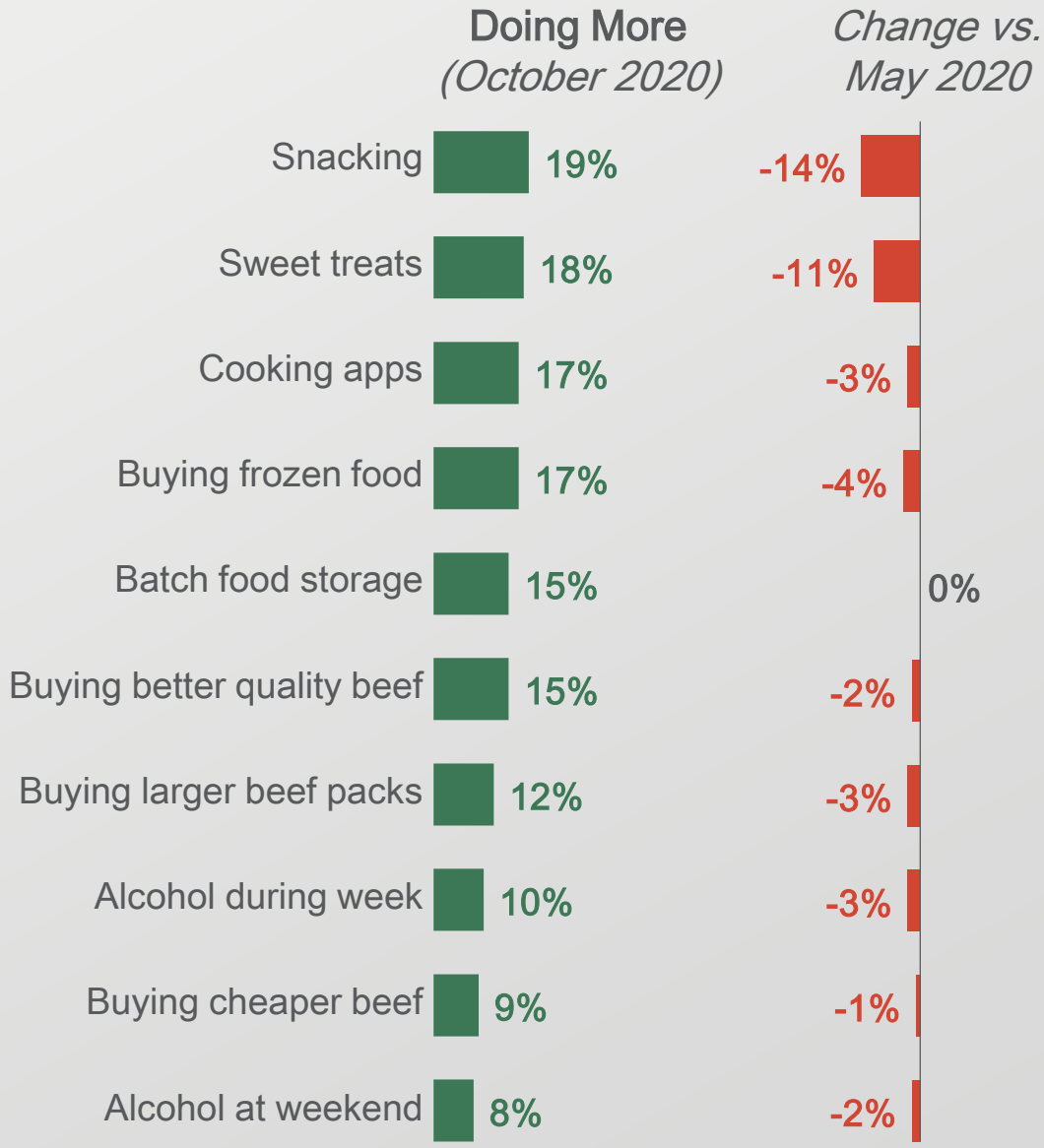
Food & Drink – Difference vs. May 2020



Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)





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Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

Shopping

BORD BIA
Thinking House

Key Trends - *Shopping*

Coronavirus COVID-19

Spanish adults are **more cautious regarding grocery shopping** behaviour since the start of the pandemic. This is seen through a vast *reduction in shopping trips*, *more avoidance of food on open display* and *increased supermarket choice based on cleanliness*. Many are *choosing local brands* more often as a result.

→ *Need for Trust & Quality Credentials*

While 3 in 10 Spanish adults claim not to shop for groceries online, **over 3 in 10 are shopping more often for groceries via this channel**.

→ *Retail strategy*

Being prepared in food terms has increased during Covid-19 with **3 in 10 Spanish adults stocking up on food essentials** and maintaining a rolling food stockpile more often as a result.

→ *Longer shelf life & Frozen*

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Photo by Atoms on Unsplash

Shopping – Change since Covid-19

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19

Based on % DOING MORE - % DOING LESS



BORD BIA Thinking House

Shopping – Behaviour Based

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



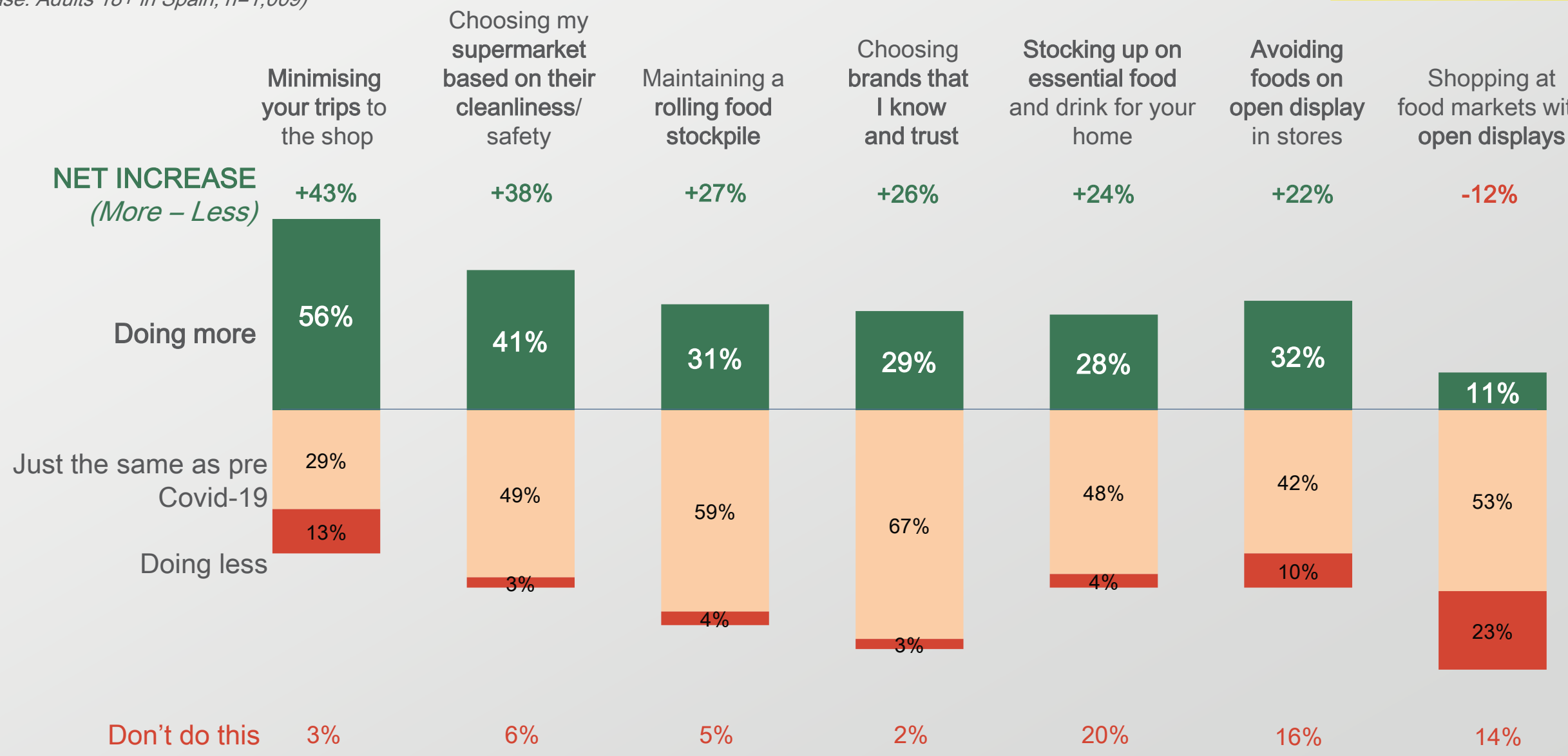
State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Shopping – Caution Based

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Shopping – Difference vs. May 2020

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



While over half of adults have minimised their trips to the shops, this has fallen since May 2020. Online shopping for groceries also has fallen in its prevalence since May 2020 but remains significantly more used since the beginning of the pandemic.

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Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

Health & Wellness

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Thinking House

Key Trends- *Health & Wellness*

Coronavirus COVID-19

We see a greater emphasis on ***immune boosting foods*** as well as an uptake of **supplements to fend off Covid-19.** Checking the **nutritional content of food** has also become much more prevalent since the start of the pandemic.

Specific/ targeting Nutritional Benefits

We see a clear trend of Spanish adults becoming more engaged around **specific functional health aspects** – including increased choice of low calorie foods for weight management, foods that benefit brain and eye health.

Targeting fish towards functional health benefits

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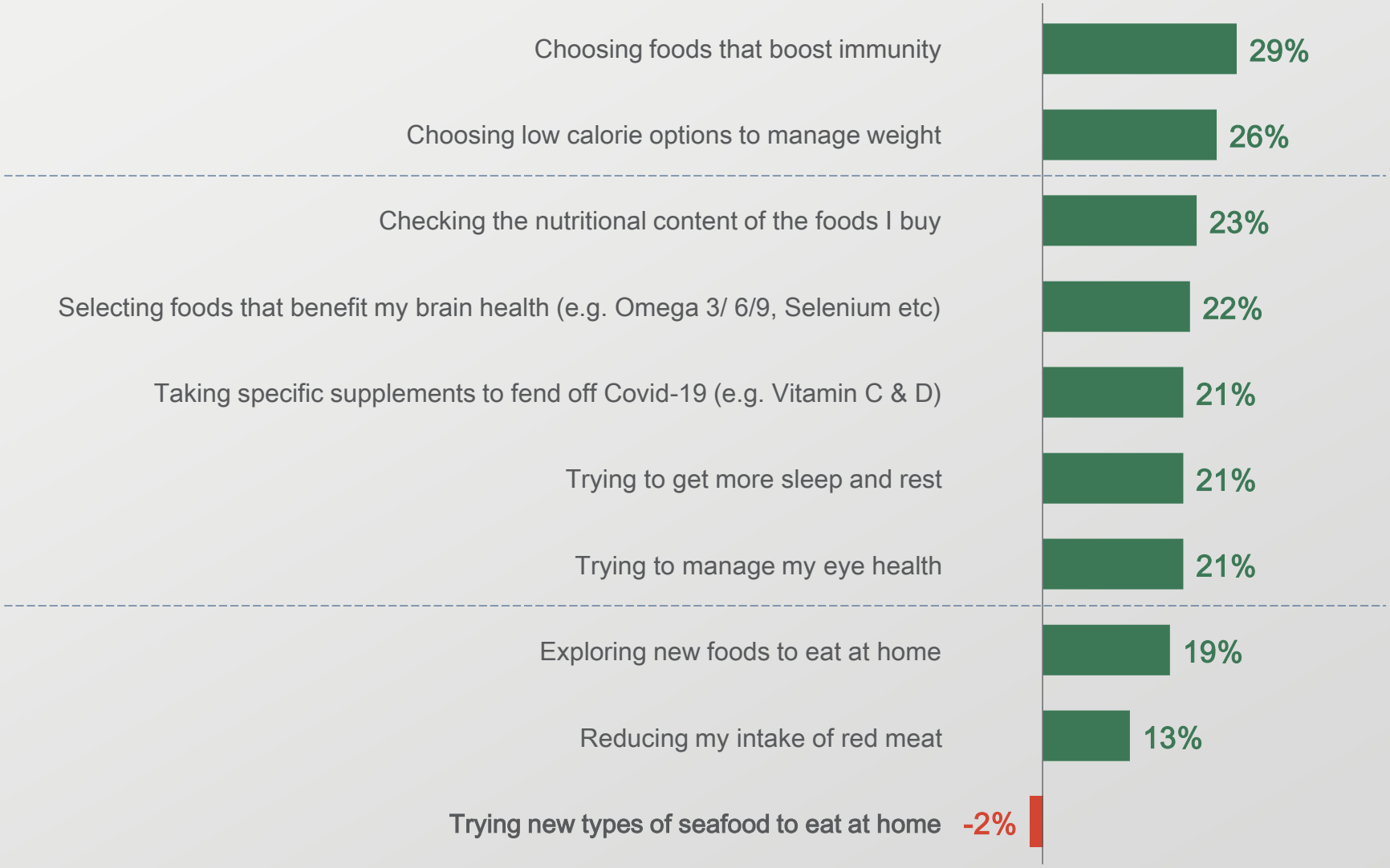
Photo by Brooke Lark on Unsplash

Health & Wellness – Change since Covid-19

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19

Based on % DOING MORE - % DOING LESS

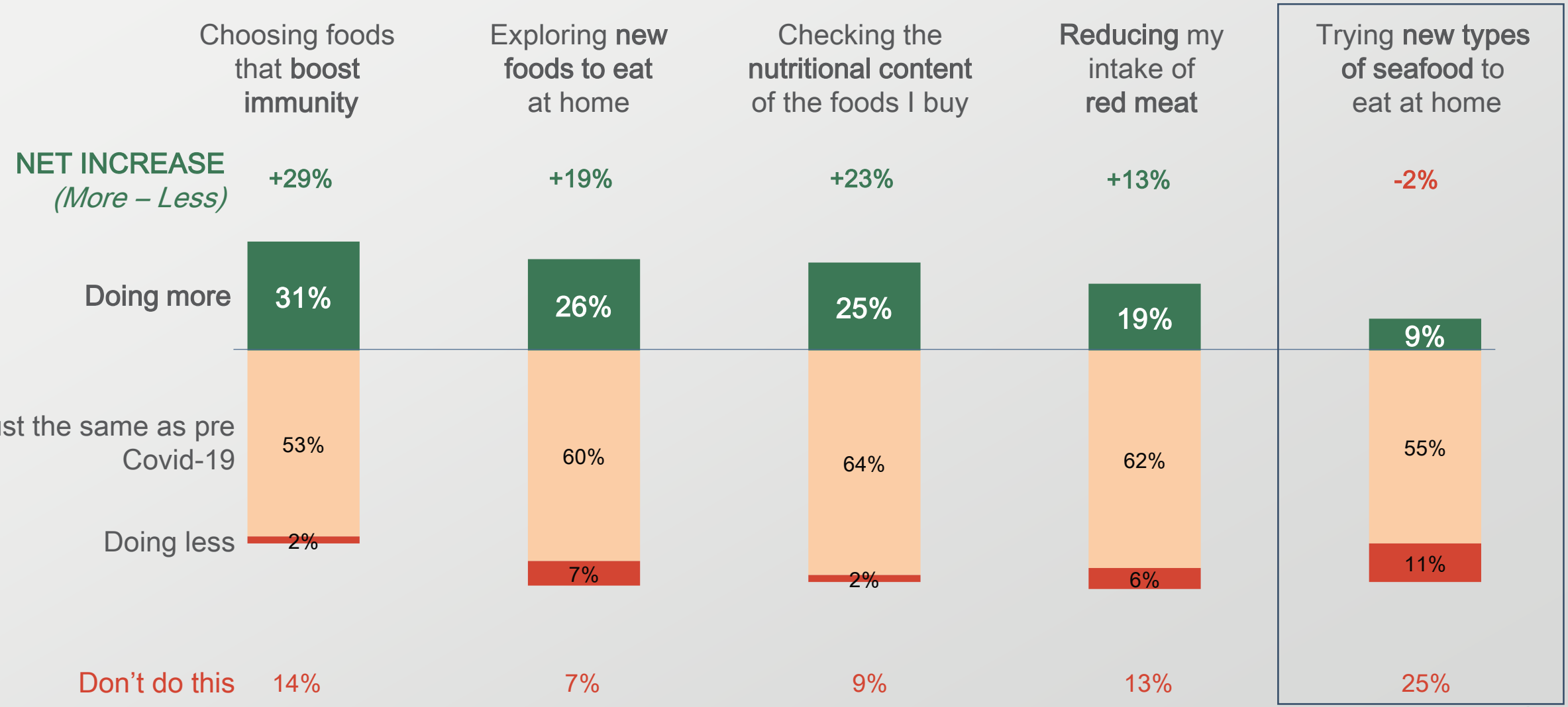


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Health & Wellness – Food Based

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)



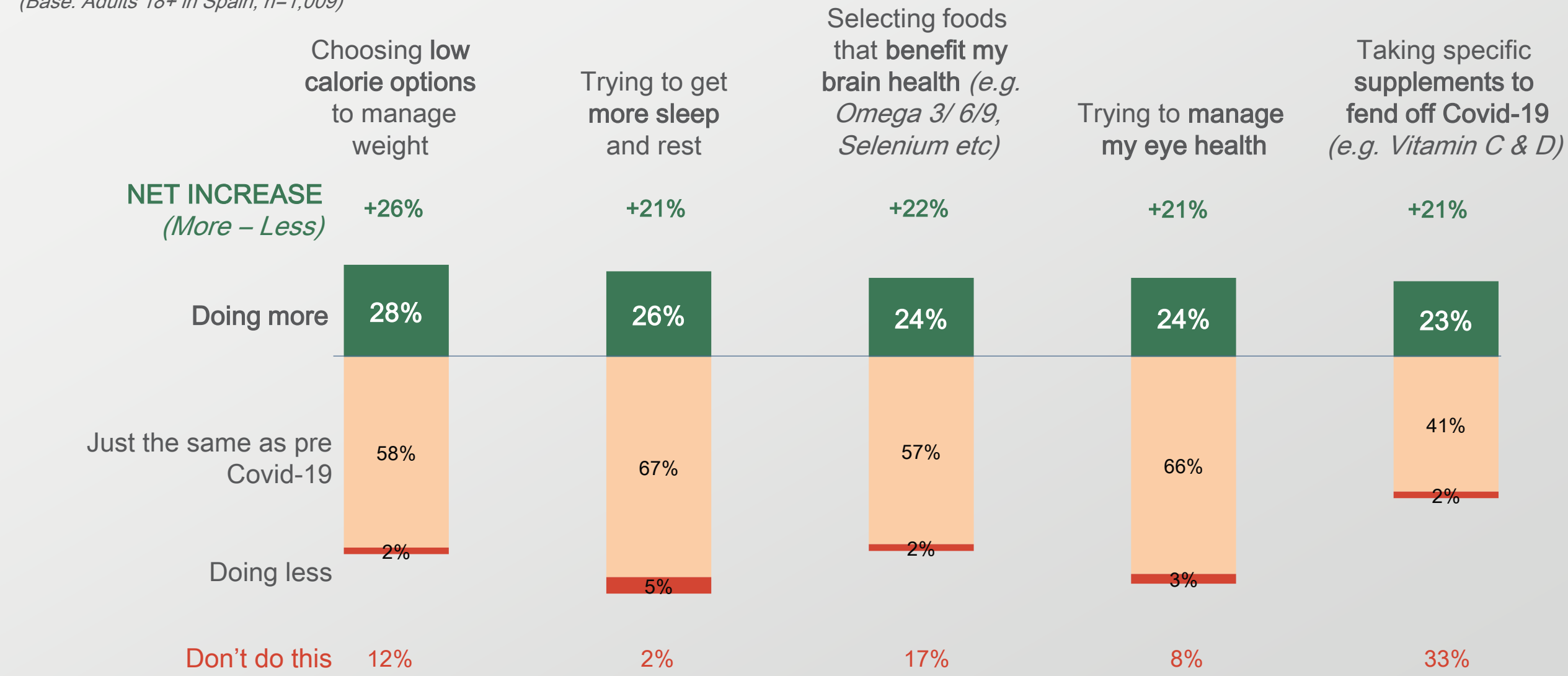
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State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

Health & Wellness – Benefit Based

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)



State the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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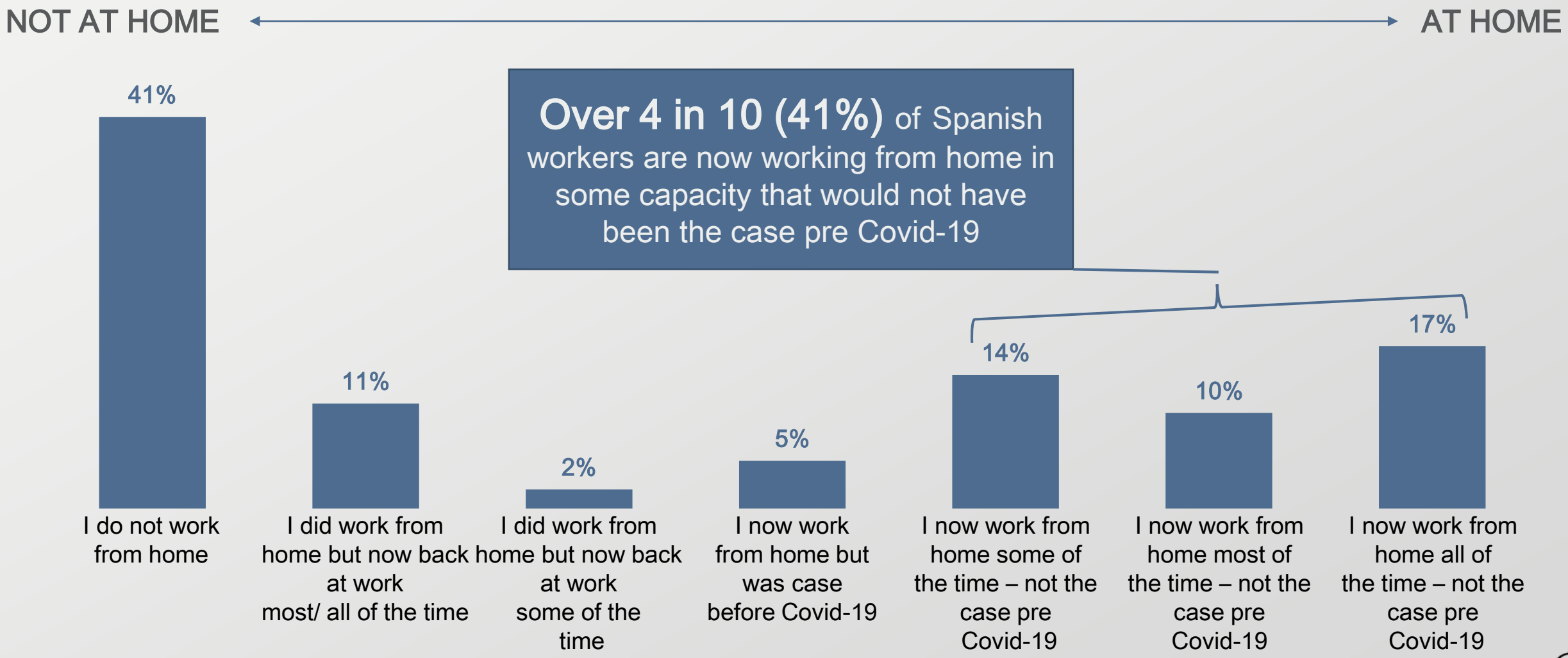
COVID-19 – The Spanish Experience

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Changing Work Dynamics as a result of Covid-19

(Base: All working adults 18+ in Spain, n=598)

Coronavirus COVID-19



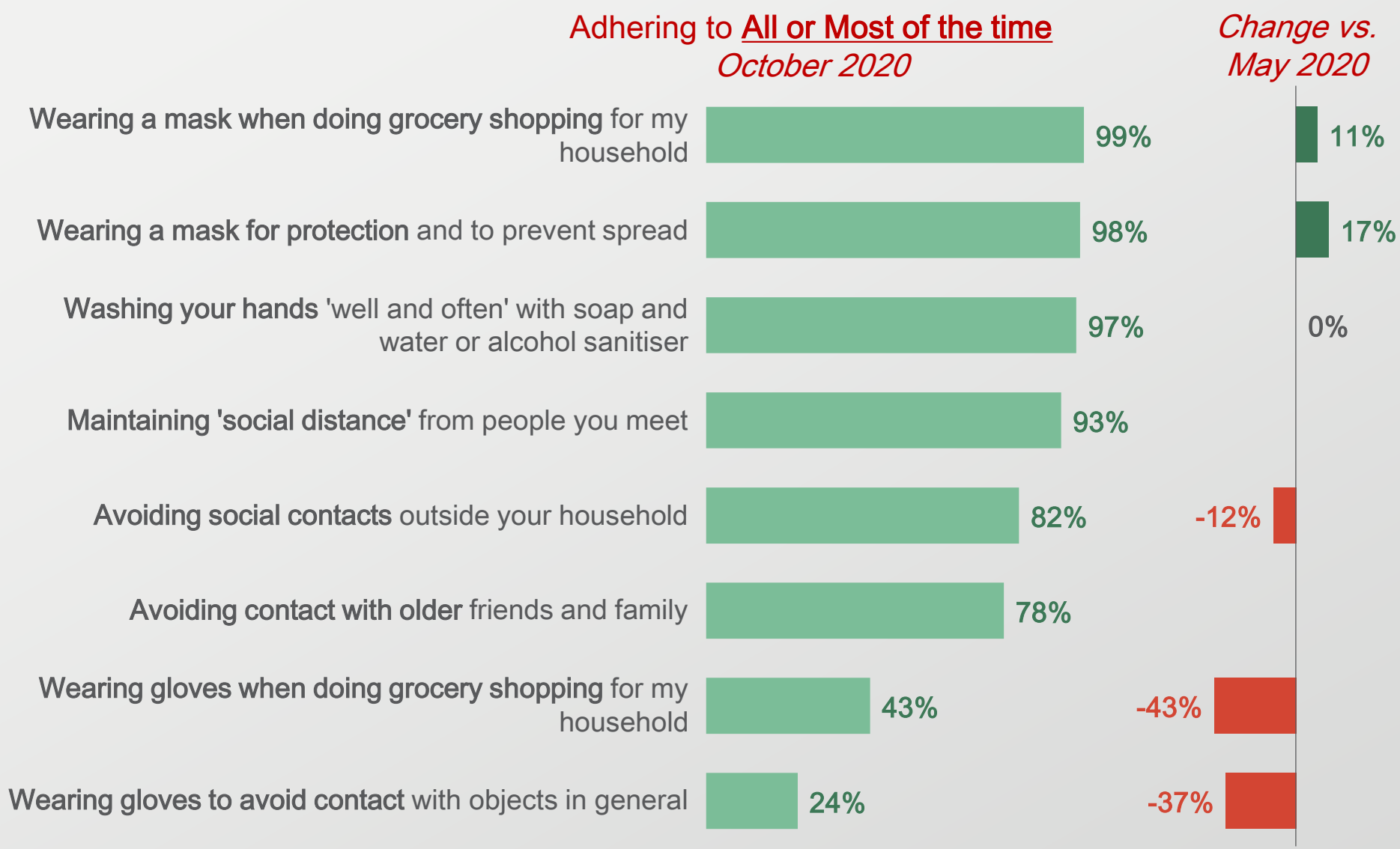
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Which of the following best describes your current situation with employment as a result of the Covid-19 situation?

Current Adherence to Specific Guidelines

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



General adherence to specific guidelines in Spain has been high with mask usage achieving the greatest uplift in adoption since May 2020 with wearing of gloves waning in this period.

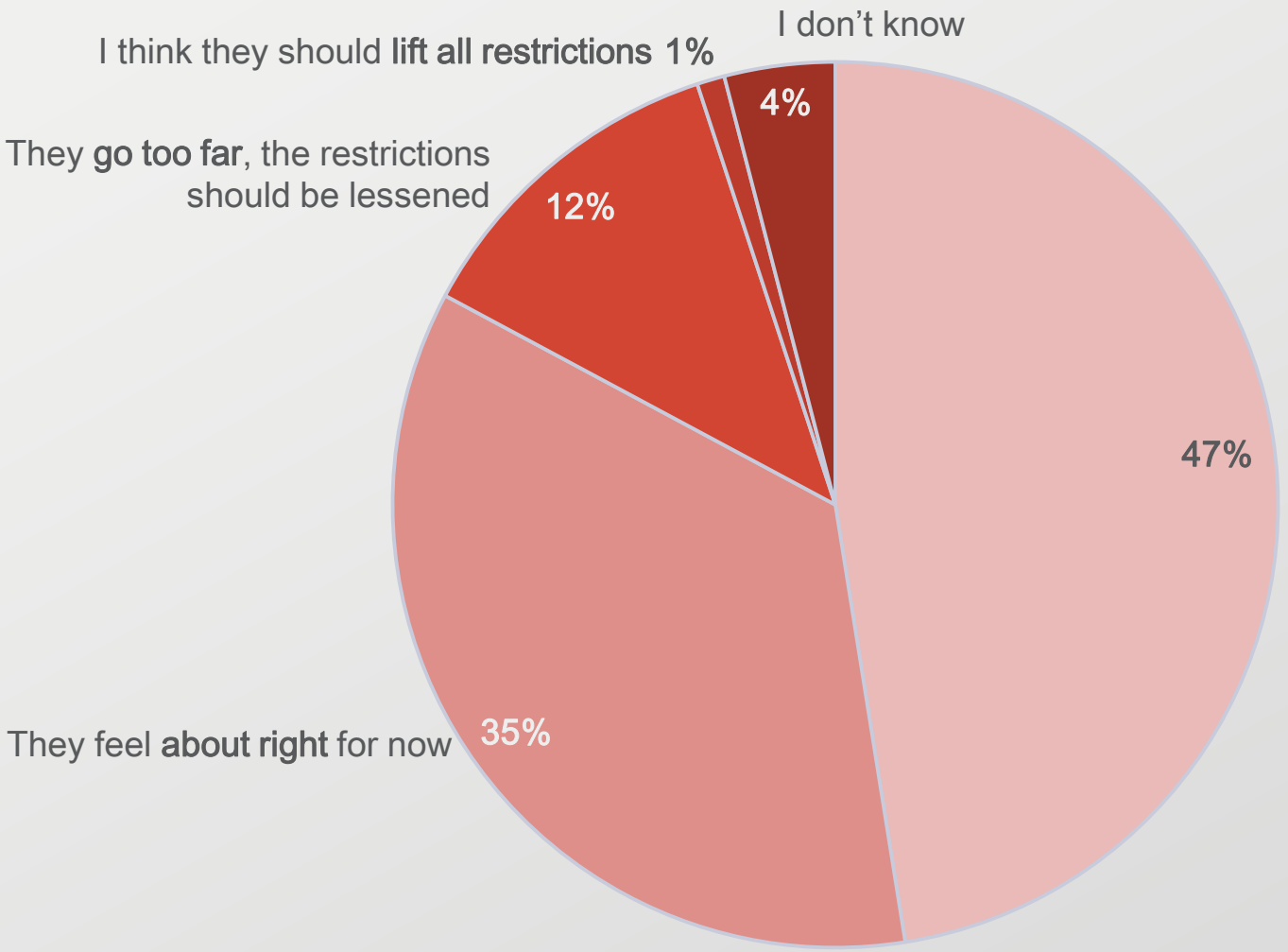
You will see some specific recommended actions designed to limit the spread of Coronavirus (Covid-19) below, to what extent have you generally adhered to each of the following?

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Do the Restrictions go far enough?

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19



Almost half of Spanish adults feel the current restrictions don't go far enough. Just over 1 in 10 feel they have gone too far.

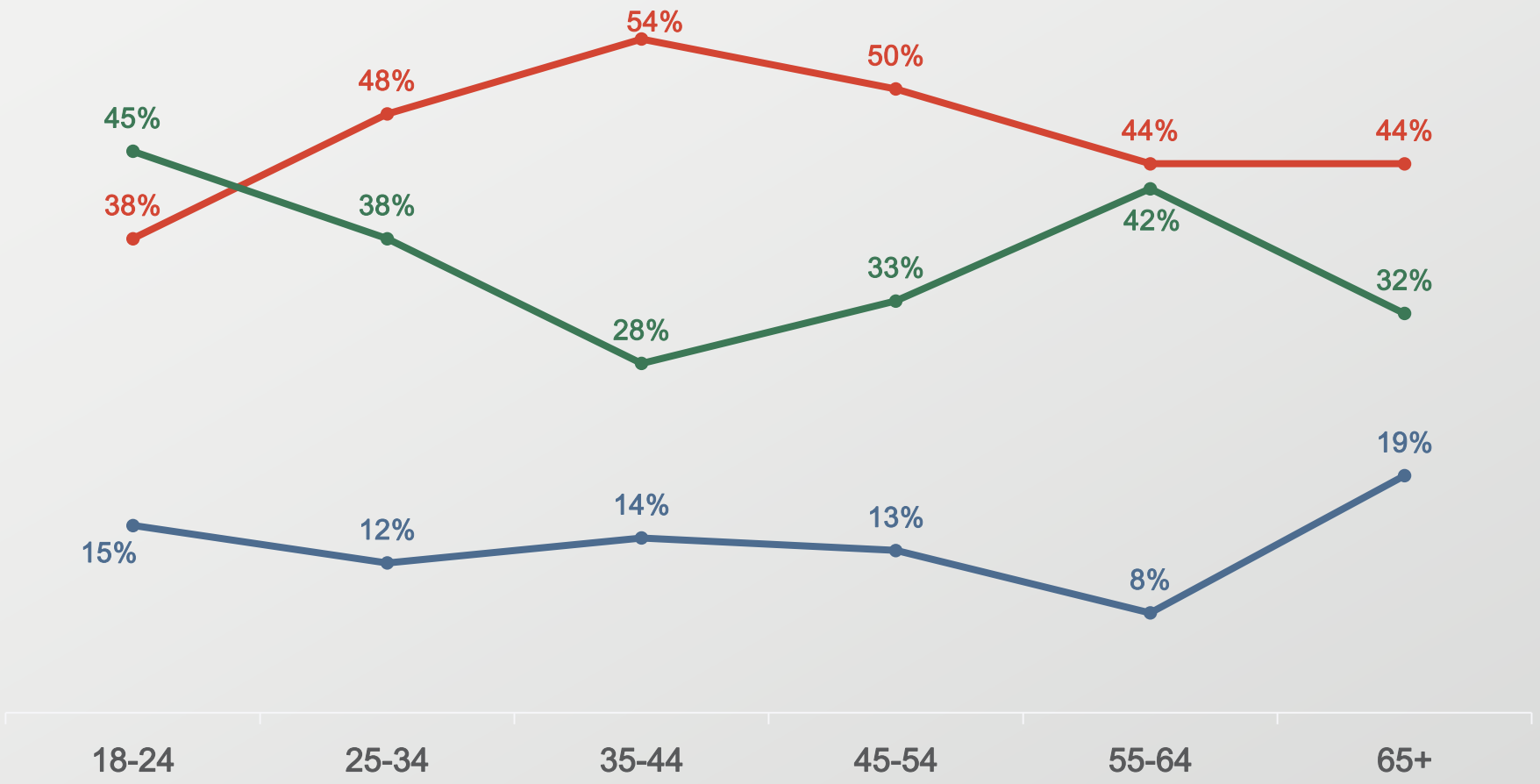
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The Government has had to implement restrictions on society in order to minimise the risk of Covid-19 spreading in the community. Which of these options best describes how you feel about these restrictions?

Do the Restrictions go far enough – by Age Group?

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)



They don't go far enough, they should be more restrictive

They feel about right for now

Too far/ Should lift all restrictions

35-54's the core cohort feeling restrictions don't go far enough.

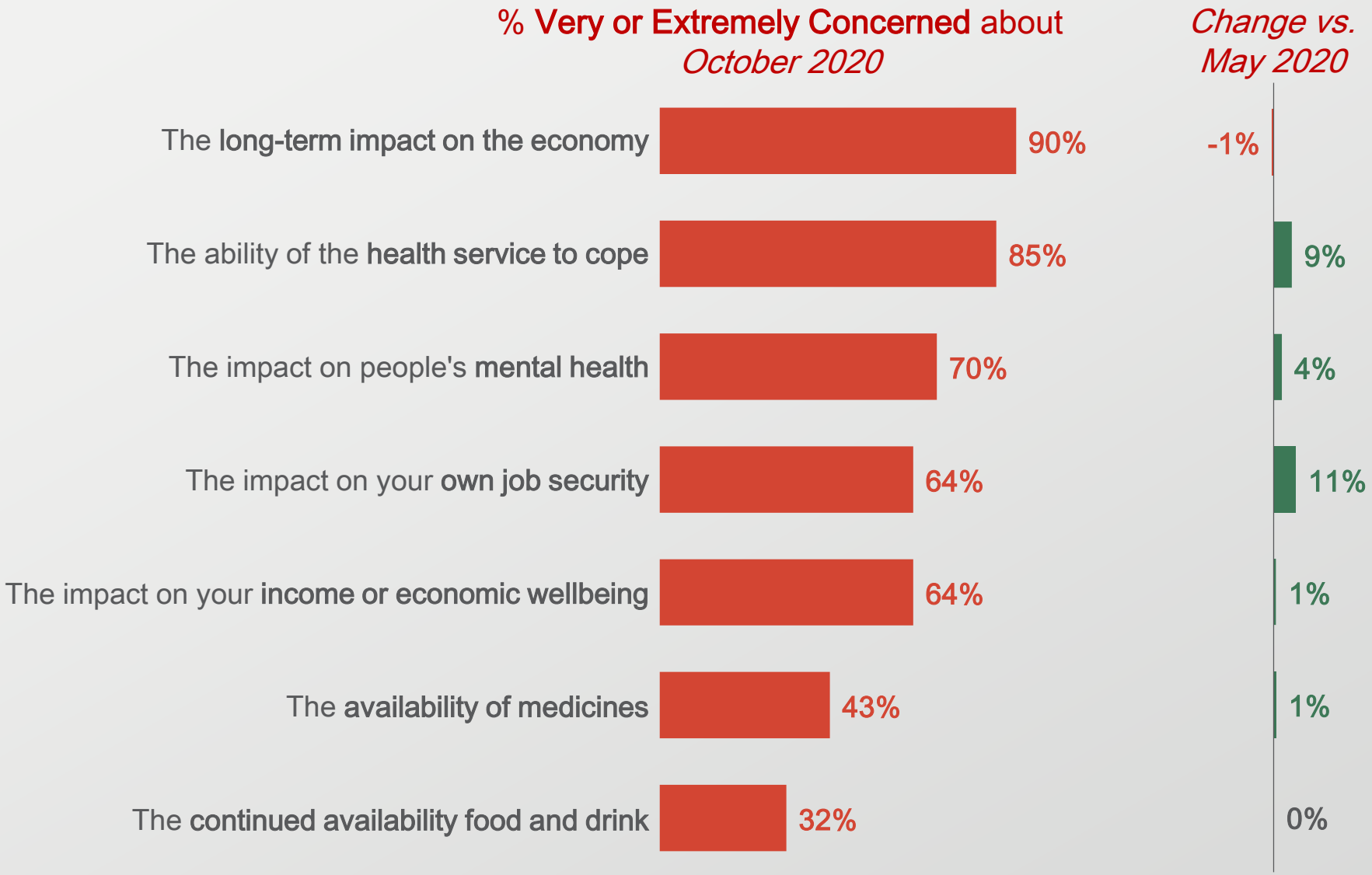
BORD BIA Thinking House

The Government has had to implement restrictions on society in order to minimise the risk of Covid-19 spreading in the community. Which of these options best describes how you feel about these restrictions?

Level of Concern for Various Aspects

Coronavirus COVID-19

(Base: Adults 18+ in Spain, n=1,009)



Spanish adults show a growing concern since May 2020 around health aspects in particular (both health service coping and mental health) as well as job security. Impact on economy longer term remains #1 key concern overall.

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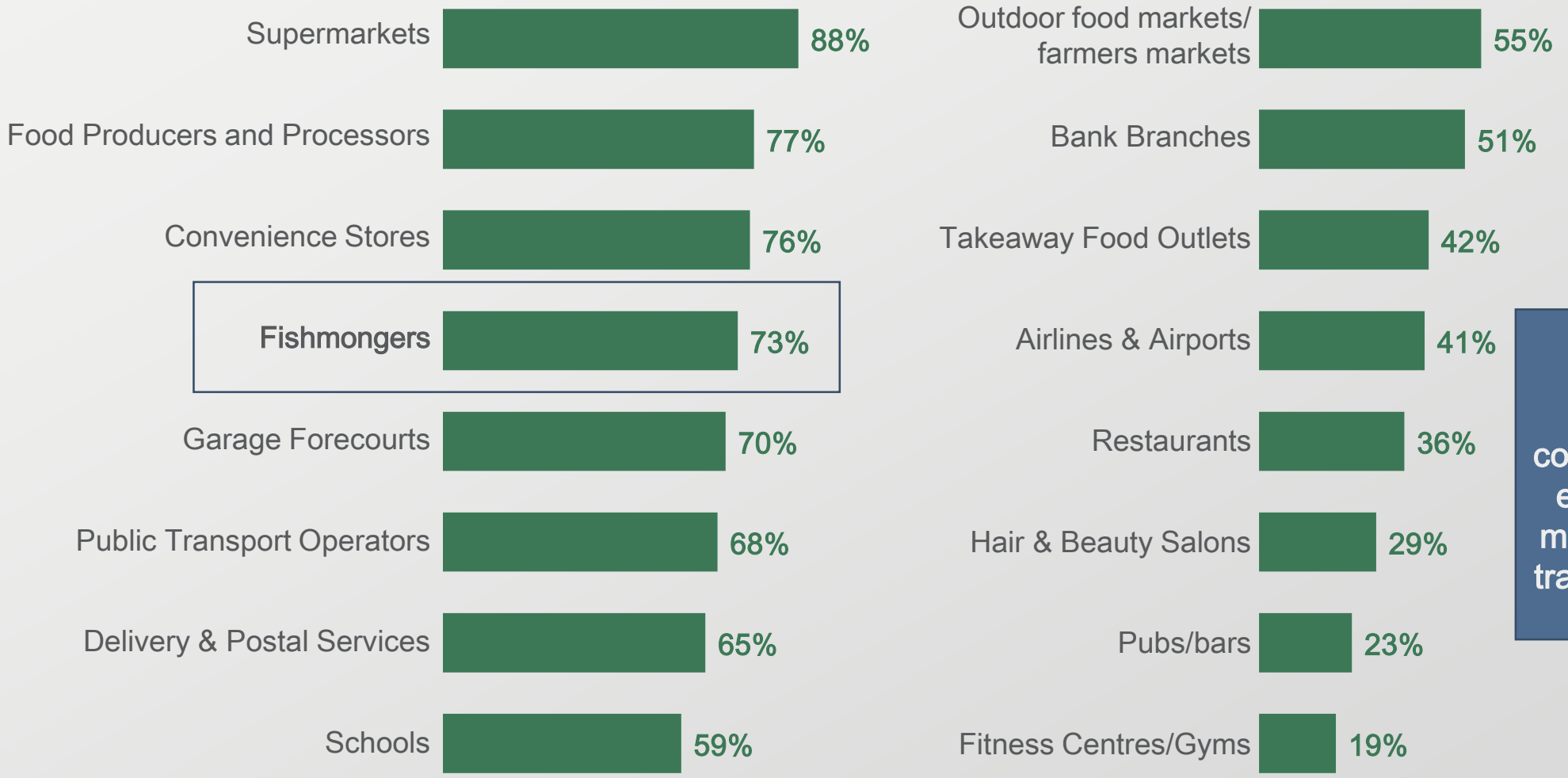
You will see some specific recommended actions designed to limit the spread of Coronavirus (Covid-19) below, to what extent have you generally adhered to each of the following?

Importance of ‘normal life’ continuation of Services

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19

% Extremely/ Critically Important



The importance of the Fishmonger service continuing as normal is highly evident in Spain – deemed more critical than both public transport and postal services.

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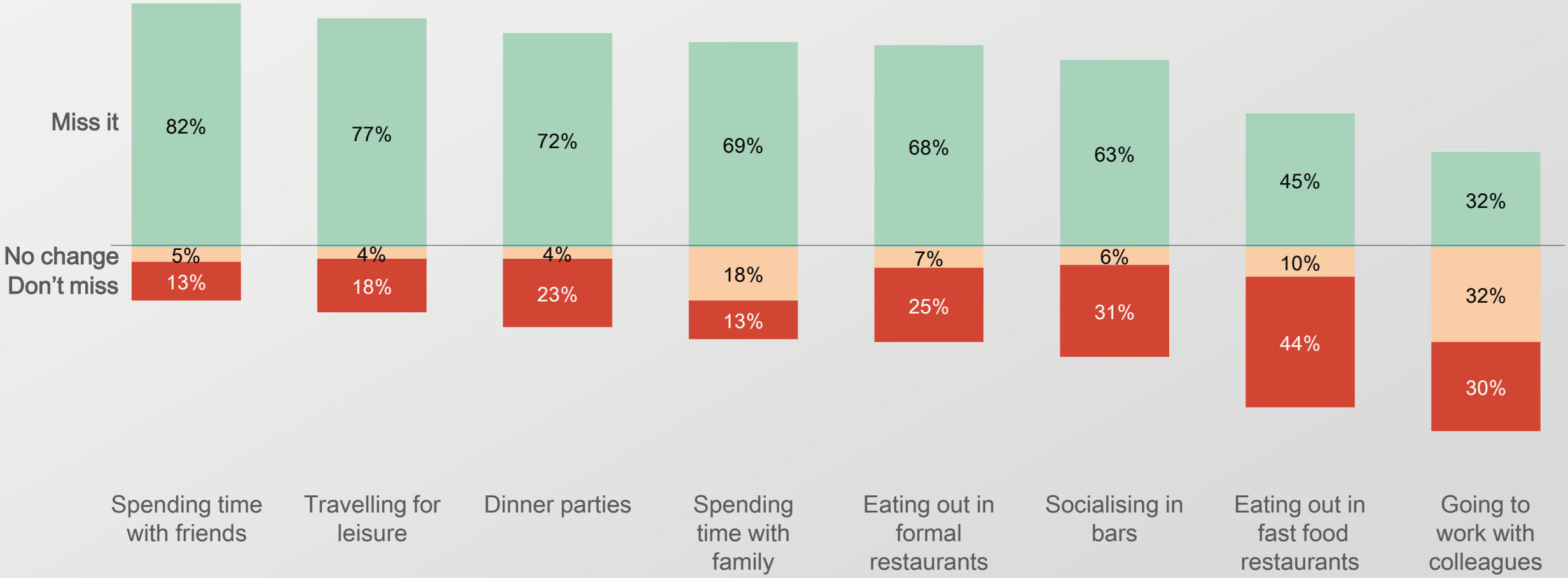
How important you believe their continued operation is to the maintenance of “normal life” during Covid-19 restrictions.

Aspects that are Missed

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19

Dinner parties and eating out in formal restaurants both missed by 7 in 10 Spanish adults as a result of Covid-19 restrictions.



To what extent do you miss each of the following that have been impacted by Covid-19.

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Who are Missing Food Related Aspects?

(Base: Adults 18+ in Spain, n=1,009)

Coronavirus COVID-19

Eating out in Formal Restaurants

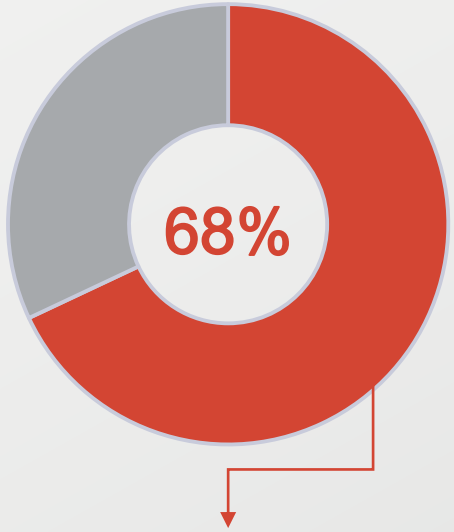




Photo by Toa Heftiba on Unsplash

Eating out in Fast Food Restaurants

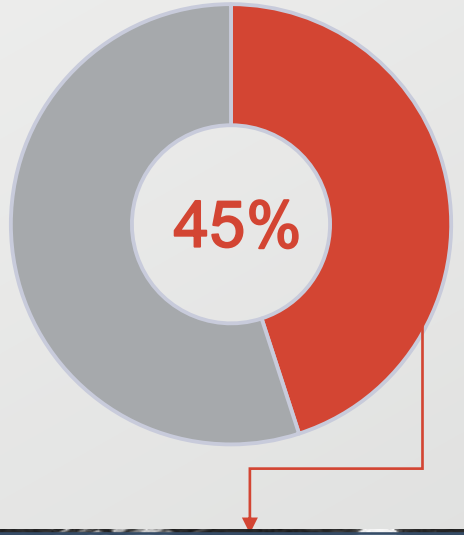




Photo by Jaco Pretorius on Unsplash

Dinner Parties

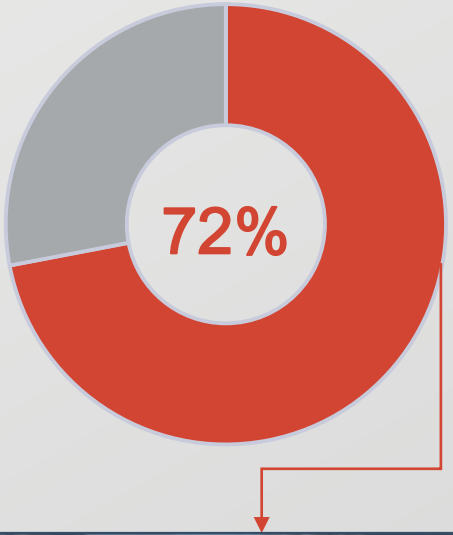




Photo by Kelsey Chance on Unsplash

To what extent do you miss each of the following that have been impacted by Covid-19.

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BIG PICTURE SEAFOOD TRENDS

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Coronavirus
COVID-19

Since the start of the pandemic, **16% of Spanish adults are cooking fish/ seafood/ shellfish for its known health benefits** *(just 4% are cooking it less often)*.

Increase is driven by **under 35's** in younger family life-stages.

SUPPORTED BY… *(since the pandemic began)*

- **33%** are **eating healthier for improved immunity** more often
- **20%** are **reducing meat consumption**
- **28%** are choosing **low calorie foods to manage weight** more often
- **25%** are **checking the nutritional content** of the food they buy more often
- **24%** are selecting foods that **benefit 'brain health'** more often

Healthier eating is a clear trend during the pandemic – especially functional health. Think **natural nutrition and specific nutrient benefits** of fish.

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Photo by Jenny Hill on Unsplash

Coronavirus
COVID-19

Since the start of the pandemic, **17%** of Spanish adults are **buying fish/ seafood/ shellfish that come from certified sustainable fisheries** *(just 4% are buying it less often)*.

Increase is driven by **under 35 males** and **more affluent**.

SUPPORTED BY… *(since the pandemic began)*

- **28%** are **consciously reducing their food waste** more often
- **19%** are buying fish more often **from a market/ fishmongers**

Sustainability credentials have become more important from a consumer perspective. **Leveraging the Irish seafood sustainability message** is of growing importance.

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Photo by Lawrence Hookham on Unsplash

Coronavirus
COVID-19

Since the start of the pandemic, **15%** of Spanish adults are **buying better quality fish/ seafood/ shellfish or better quality cuts of fish** more often *(just 6% are buying it less often)*.

Increase is driven by **under 35's** and **more affluent**.

SUPPORTED BY… *(since the pandemic began)*

- **15%** are **buying better quality beef** more often
- **29%** are **choosing brands they know and trust** more often

A sizeable cohort of main younger more affluent consumers are buying better quality seafood. Think **Quality reassurance and Taste credentials.**

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Photo by Caroline Attwood on Unsplash

Coronavirus
COVID-19

Since the start of the pandemic, **27%** of Spanish adults feel that **understanding where their seafood comes from is more important** now – but this coincides with an **increase in buying more locally sourced** seafood/ shellfish.

Increase is driven by **over 45 females**, with more **mature families**

SUPPORTED BY… *(since the pandemic began)*

- **21%** are buying **more locally sourced fish**/ seafood *(5% buying less)*
- **16%** are buying **more locally sourced shellfish** *(5% buying less)*
- **39%** are **choosing local grocery brands** more often
- **29%** are **choosing brands they know and trust** more often
- **19%** are buying fish more often **from a market/ fishmongers**

Dial up the **importance of Irish origin** and the **associated benefits of Irish fish.**

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Photo by Elena Mozhvilo on Unsplash

Planners

Coronavirus COVID-19

Welcome to the Planners section of the toolkit.

In this section you will find a series of tools that will help you think through the implications of our Indicators and Validators to your business. We recommend you work through this section sequentially.

There are three very simple steps in our suggested process for planning your business' post-Covid Future. Again you can click on each of the three boxes below to bring to this content.

THINK	PLAN	DO

BORD BIA Thinking House

Planners

Coronavirus COVID-19

THINK

The first step in making sense of the changed consumer behaviours we have identified is to think through the implications for your business.

There are two parts to this part of the planning process.

Firstly, we suggest you complete Indicator Mapping, this will allow you to identify the behavioural changes that will have greatest impact.

Secondly, we suggest you complete the Pressure Test, this will allow you to understand the scale of the macro risks your business is facing.

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1. Indicator Mapping

Planners

Coronavirus COVID-19

In order to pinpoint specific indicators of concern to your organisation, use this tool to map them based on the length of time you expect them to impact your business and the scale of the impact. Feel free to add your own indicators or new ones as they emerge. You can download a blank map on the next page.

General Behaviours







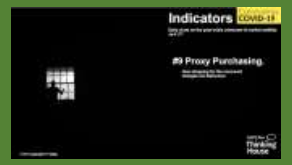




Shopping Behaviours











Consumption Behaviours

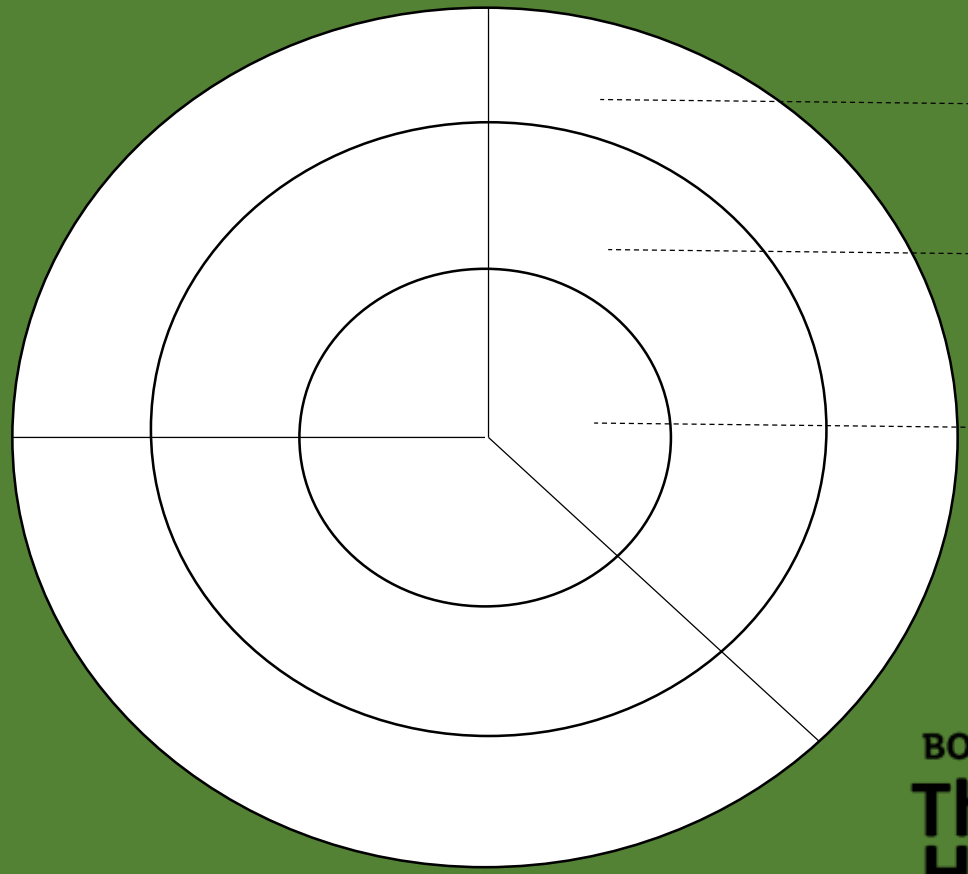








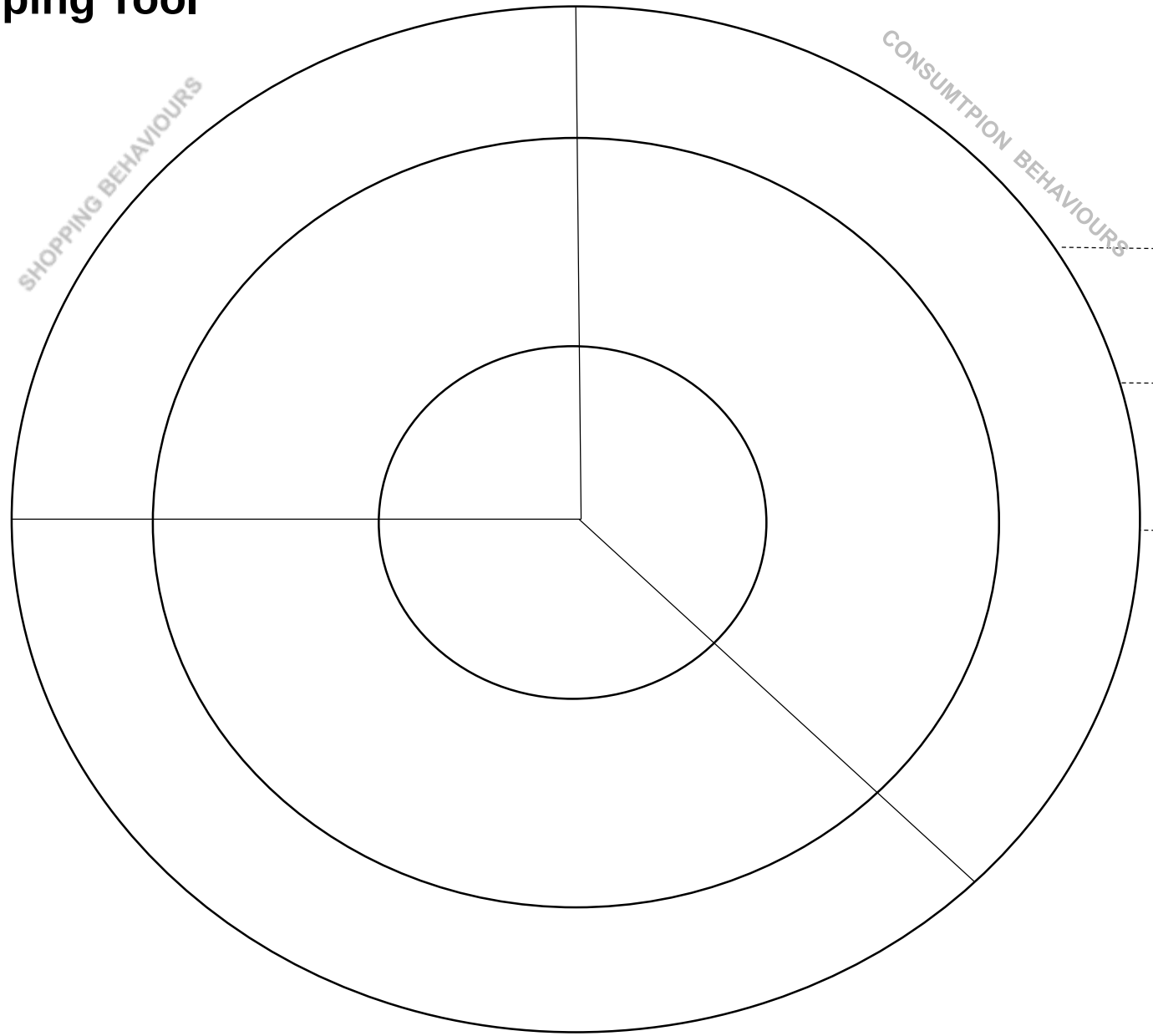




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Indicator Mapping Tool

Coronavirus
COVID-19



Low Impact Zone

Med Impact Zone

High Impact Zone

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2. Pressure Test

Planners

Coronavirus COVID-19

Having identified the changes in consumer behaviour that will have greatest impact on your business, the next step is to reflect on some of the bigger 'macro' forces beyond consumers that could impact on your business and start to develop plans to mitigate against it.

Use this simple framework below and the tool on the next page to think this through.

Consumer Behaviour	Brand	Competition
Supply Chain	*YOU*	Price Pressures
Distribution	Market Access	Sustainability

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Pressure Test Tool

Coronavirus COVID-19

Now thinking beyond indicators – what are the other 'big forces' are at play shaping the future of business. You can refer here to your own internal work or outputs from Bord Bia's Readiness Radar.

Consumer Behaviour	**Brand**	**Competition**
Supply Chain	*YOU*	**Price Pressures**
Distribution	**Market Access**	**Sustainability**

Scribble your notes here....

Business Issue: a single line that describes the challenge you business faces in the new normal

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Planners

Coronavirus COVID-19

PLAN

The second step is to begin planning changes your business needs to make in response to the business issue identified through the pressure test tool.

There are also two parts to this part of the planning process.

Firstly, we suggest you complete the Now Next exercise, this will allow you to prioritise major changes you need to make.

Secondly, we suggest you complete an Activity Goal, this will allow you to frame in clear language the precise action you are going to take.

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3. Now & Next

Planners

Coronavirus COVID-19

You know the big issue facing your business now. Its time to start planning for the future by identifying where your business needs to go next. We do this very simply through a 'listing exercise'. You can do this yourself or, ideally, in a group workshop with internal stakeholders.

Use this simple framework below and the tool on the next page to think through Now & Next.

Business Issue: a single line that describes the challenge you business faces in the new normal

Now	Pathways	Next
A list of the problems you have to solve to address your business issue	A line on what needs to change to deliver against each problem	A list of the changes that you are going to make to your business

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Now & Next Tool

Coronavirus COVID-19

Now thinking about your business issue what are the big changes you need to make to your business

Business Issue: a single line that describes the challenge you business faces in the new normal

Now

A list of the problems you have to solve to address your business issue

Pathways

A line on what needs to change to deliver against each problem and how you are going to measure that change

Next

A list of the ambitions that are next for your business

Prioritisation

1 your first ambition

2 your second ambition

3 your third ambition

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4. Activity Goal

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Now you have prioritised your ambitions its time to articulate clearly the change in consumer behaviour you are going to address the actions your business needs to take to address this. You write your activity goal by articulating:

1. **The Change in Consumer Behaviour you are going to tackle to deliver that 'Ambition' - *An Indicator***
2. **The Macro Force that will constrains your ability to deliver your 'First Ambition' - *A Pressure Test Issue***
3. **The Action you are going to put in place address that changed consumer behaviour - *A Priority Next***
4. **The things you need to Measure to demonstrate success - *A Key Performance Indicator***

Use the tool on the next page to define your Activity Goal

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Activity Goal

Now you have prioritised your ambitions lets articulate the activity you are going to take

Indicator	We will target consumers who are….
Pressure Test:	…….. in spite of……..……..
Priority Next:	We need to……..……
KPI:	……..…… And will succeed if……..

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DO

The final step is to develop your action plan in response to your activity goal. This last step will help keep you focused on the timelines for delivery of your Future Proofed plans.

We suggest you complete the Action Plan tool to help you think through immediate actions your business needs to take.

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5. Action Plan

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The purpose of completing the action plan is capture on one page the steps your business needs to take to Future Proof your business for the changed consumer environment.

Completing this action plan you can begin to see the road ahead and some of the supports from Bord Bia that you could be leveraging to help you deliver this plan. The framework below illustrates the key elements of your action plan.

Use the tool on the next page to complete your Action Plan.



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Action Plan

Capture Your Future Proofed Plans On A Page

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Business Issue: .....

.....

Activity Goal: .....

.....

Actions: .....

.....

.....

.....

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Strategic Response

Circle Your Business Response Below

New Products Existing Markets	New Products New Markets
Existing Products Existing Markets	Existing Products New Markets

Supports

Indicate which support is critical to delivery of your activity goal

Insight & Innovation	
Brand Development	
Lead Generation & Market Activation	
Capability & Training	
Sustainability Planning	

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Future Proofing Toolkit

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