Coronavirus
COVID-19

Future Proofing Toolkit



UAE Edition

BORD BIA
Thinking House

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



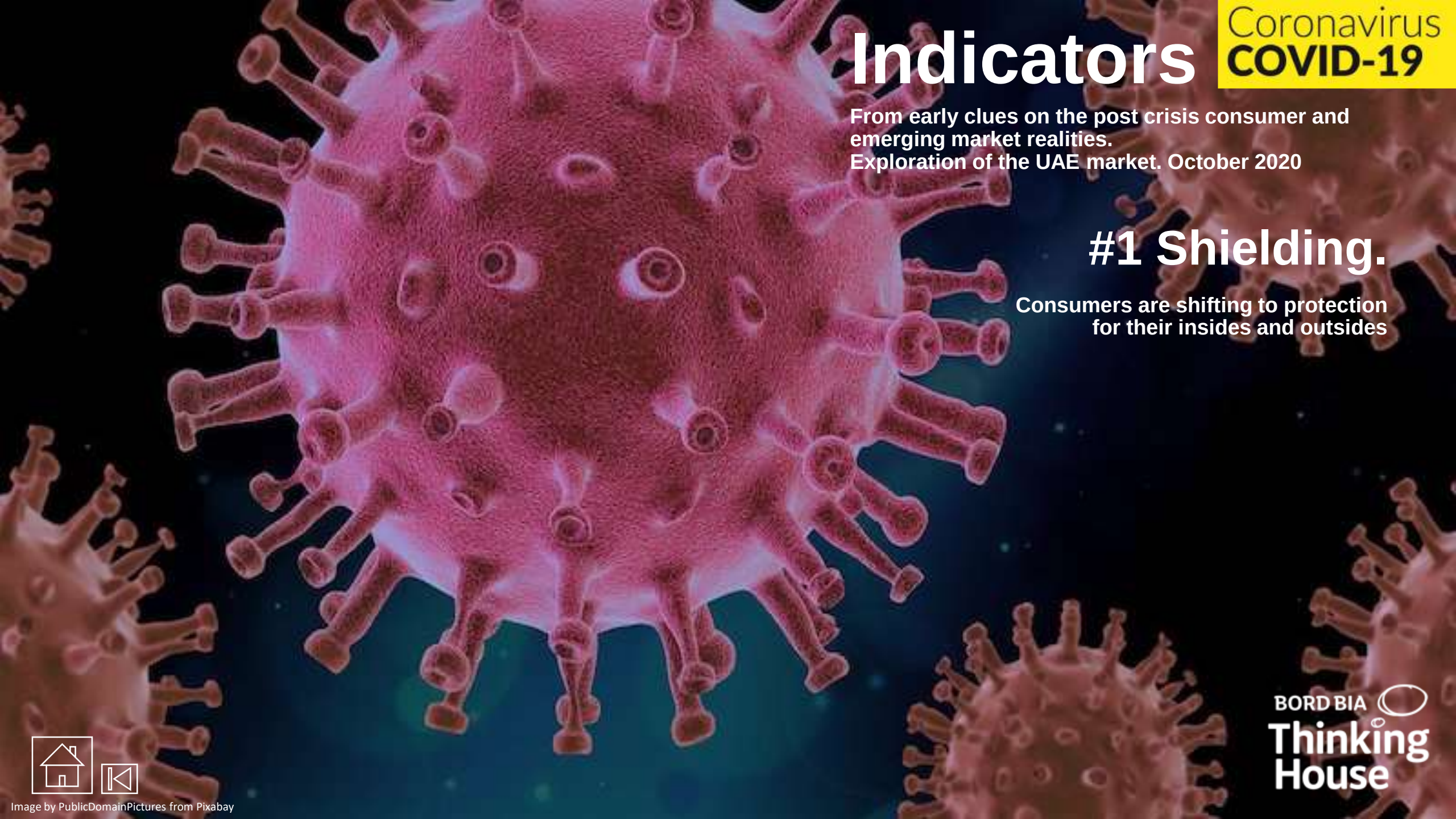








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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#1 Shielding.

Consumers are shifting to protection for their insides and outsides

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Image by PublicDomainPictures from Pixabay

#1 Shielding

Consumers are shifting to protection for their insides and outsides.

While Health and Wellness has become an engrained part of life, the intensity with how we view our health is likely to change over the months and years ahead. Recent years have seen a conversation around proactive health management with a goal of eating and drinking foods that enable us optimise our health. Post Covid-19, the indicators suggest **"Protective Health Management"** will emerge.

The fact that there is a wait to find a cure, the fact that this virus has showed some signs of potential reoccurrence in people, the fact that there is even conversation that there could be more such viruses in the future in a more globalised world, will all create great desire for shielding and self-protection.

Foods that can **protect our defence systems are growing** in popularity. This is highlighting a shift in the role functional foods plays for consumers. Recent years have seen Science and Nature blend in the minds of consumers with an ever greater focus on the role of **natural nutrition**. As we move into the Post-Covid world, consumers may well pay more attention to the **Science of Food Functionality**. Consumers may want nutrition that helps boost their immunity. In fact, this is already happening.

We call this indicator **SHIELDING**.



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#1 Shielding

Consumers are shifting to protection for their insides and outsides.

Probiotics and fermented products continue to grow in sophistication across markets with Covid-19 enhancing that upward trajectory.

50%

of adults in the UAE are choosing foods that help boost immunity more often

Bord Bia Indicators Barometer Oct 2020

Dubai based Kombucha company Saba has enjoyed a sales boom during the pandemic, with online orders increasing by 30% across Spinneys, Waitrose Carrefour and organic retail shops.

According to the owner Vincent Vandenbeele, *"People are now more aware that they need to improve health in general and the key is to boost the immune system to fight any kind of virus and keep energy levels up."* Vandeenbeele also believes there is increasing demand across the region for natural products such as fermented foods and drink such as milk kefir, non dairy kefir and probiotic yoghurt.

Analysts say the Middle East and Africa Kombucha market was valued at US $75mn last year and is tipped to enjoy an annual CAGR of 25% to $232m by 2025. Products known to boost the immune system such as yoghurt and laban increased in popularity and are expected to grow, even after the pandemic. (Euromonitor)

Source: Food Navigator Asia May 2020

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#1 Shielding

Consumers are shifting to protection for their insides and outsides.

Deficiencies in Vitamin D in the Gulf Region provide huge opportunities for functional food brands.



46%

of adults in the UAE are taking more specific supplements to fend off Covid-19 now

Bord Bia Indicators Barometer Oct 2020

A two year Dubai Health Authority study presented in 2017, found an estimated 90% of the UAE population are Vitamin D deficient.

While many people would assume people in the UAE would get more than adequate Vitamin D, the fact that many people stay indoors with temperatures regularly exceeding 40 degrees and with people invariably covered up clothes wise, means less exposure to the sun.

The many benefits of Vitamin D are frequently lauded with recent research highlighting increasingly how Vitamin D can prevent and protect against respiratory infections. It might be unsurprising then, that low Vitamin D levels are also being associated with a greater risk for contracting Covid-19.

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#1 Shielding

karolinagrabowska@pexels.com

Covid-19 is driving a desire for more clean foods and changing some dietary habits for now.

52%

of adults in the UAE say that nutritional content of the food and drink they buy is more important now

Bord Bia Indicators Barometer Oct 2020

48%

of adults in the UAE say that it is more important now that the food and drink they buy is natural

Bord Bia Indicators Barometer Oct 2020



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#1 Shielding

Oats, eggs, fish and dairy are all seeing a rise in consumption.

37%

of adults in the UAE are having more eggs now

Bord Bia Indicators Barometer Oct 2020

31%

of adults in the UAE are having more dairy now

Bord Bia Indicators Barometer Oct 2020

31%

of adults in the UAE are having more oats now

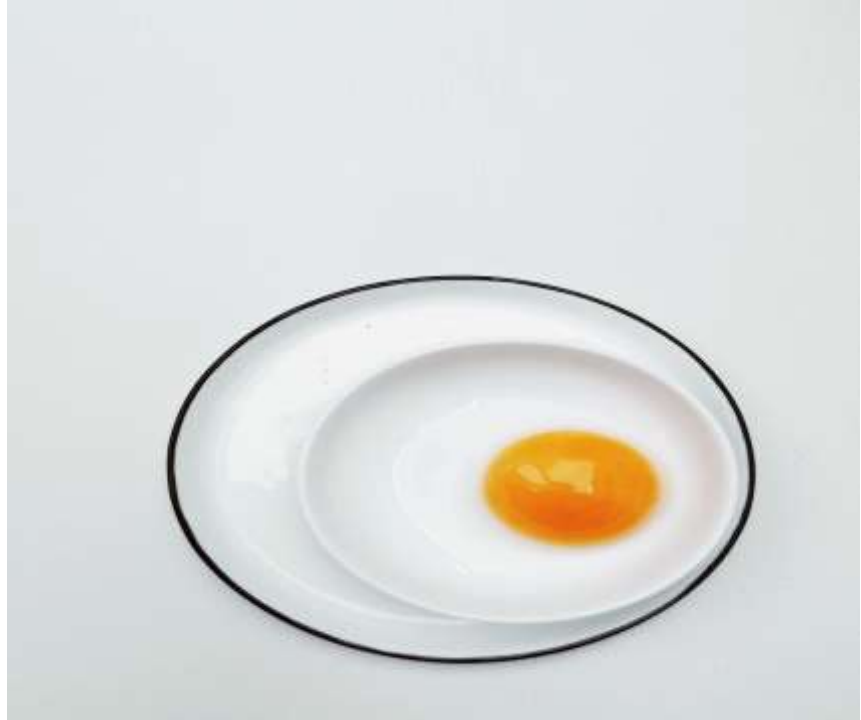
Bord Bia Indicators Barometer Oct 2020

36%

of adults in the UAE are having more fish now

Bord Bia Indicators Barometer Oct 2020







With the increase in healthy eating, there is a claimed **decline in consumption of beef and other red meat** in particular – again, driven by over 35 year olds.

33%

of adults in the UAE are eating less meat now

Bord Bia Indicators Barometer Oct 2020

Photo by Benjamin Faust on Unsplash

#1 Being healthy and active is part of shielding

In fact, it's not just about immunity, but a healthy active mindset seems to have emerged.



38%

of adults in the UAE are following an exercise regime

Bord Bia Indicators Barometer, Oct 2020

47%

of adults in the UAE are increasing their water intake

Bord Bia Indicators Barometer, Oct 2020

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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#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
- Innovations in the work environment that provide new food opportunities

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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#2 Comfort Cooking.

Consumers are retrenching to familiar old favourites and forming new habits



Image by PublicDomainPictures from Pixabay

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#2 Comfort Cooking

Consumers retrenching to familiar old favourites and forming new habits.

As our frantic lives have been put on mute, the pace of home life is slowing down. Time poor consumers have almost overnight moved from the world of compromised convenience foods to a world of home cooking and even slow cooking.

Necessity is the mother of invention. Being stuck at home means the kitchen is becoming a focal point of our day. But invention in this world isn't necessarily completely new meals or recipes. In fact, necessity during Covid-19 seems to be much more about a retrenchment back into familiar old favourites.

Globally, consumers are now finding comfort in cooking. In China, the original epicentre of Covid-19 lockdown, a national survey (n1000) conducted in February by Kantar China found that to pass time close to a third of people got into baking and cooking.

Cooking is back for us all now. Cooking for comfort. Cooking for sustenance. Cooking for security. Cooking to let us feel that something familiar remains in this all too unfamiliar new world.

We call this indicator **COMFORT COOKING**.

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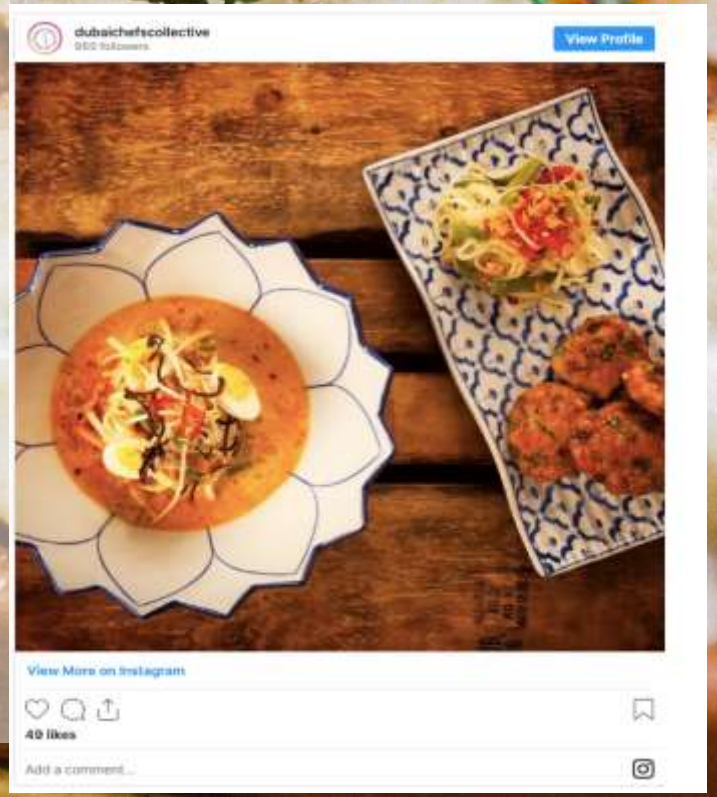
#2 Comfort Cooking

Consumers are retrenching to familiar old favourites and forming new habits as they embrace more cooking.

Eating out is a norm for many in the UAE. With the result that many people don't do that much cooking at home. Cooking now is a whole new experience for many, which is an opportunity for brands to engage with many people in the kitchen for the first time.

The Dubai Chef Collective is one interesting thing to emerge during Covid-19. Started by chef Shane Born, the idea is to create a platform where chefs can share recipes and ideas. This platform is helping people learn more about the people behind the scenes as well as providing people with a breadth of recipes of their favourite dishes whilst also educating people more about food and where it comes from.

"In the UAE, we have a culture where we go to restaurants without really knowing anything about the people preparing our food. I think customers would be more willing to go out of they knew the chefs better," says Born.



34%

of adults in the UAE are learning to cook using recipes

Bord Bia Indicators Barometer, Oct 2020

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https://www.thenational.ae/lifestyle/food/what-i-learnt-from-attending-a-virtual-dinner-party-with-10-strangers-in-the-age-of-covid-19-1.998834

#2 Comfort Cooking

Consumers retrenching to familiar old favourites and forming new habits as they embrace more cooking.

Virtual dinner parties have become a new form of entertainment during Covid-19.
Table tales is one such example, set up in the UAE during Covid, which involved a number of dinner parties being set up requiring people to tell stories around the menu they each prepared, often rooted in their local culture.
The breadth of cultures across the region ensures rich storytelling and an opportunity to learn about different food cultures, ingredients and recipes.
This is about localising comfort food and celebrating heritage and real food values.

At the heart of these meals is the need to get some solace and comfort in these strange and different times.



4 in 10 adults are **buying better quality foods** in general as a result of the pandemic.

https://www.thenational.ae/lifestyle/food/it-helps-people-get-to-know-us-dubai-s-finest-chefs-join-forces-to-create-an-online-platform-for-ideas-tips-and-recipes-1.1025522

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Indicators

Coronavirus COVID-19

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Exploration of the UAE market. October 2020

#2 Comfort Cooking.

Early Implications for Irish Food & Beverages:

- Consumers embrace comfort foods
- Consumers replicate their take-out favourites
- Consumers reject convenience cooking
- Consumers learn about new ways to cook and new ingredients and recipes from around the world “localised comfort food”

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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020



#3 Simply Safe.

Consumers are looking for security in simplicity, transparency and familiarity

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Image by PublicDomainPictures from Pixabay

#3 SIMPLY SAFE

Consumers are re-prioritising basic, simple safety needs from their food

We are all hard-wired to seek out safety at times of fear. Our “safety circuits” are based in the *amygdala*; part of the most primitive structure in our brain. Its primary concern is to protect us, which is rational and welcomed with the threat of Coronavirus. But the challenge to protect ourselves is heightened by the unpredictability and lack of clear understanding of the threat from the Coronavirus. This leads to unusual responses according to Dorothy Frizelle (Consultant Clinical Psychologist).

Grocery stockpiling is a well documented outplaying of this response, serving as a means of comfort, control and reassurance for consumers. However, we are also seeing more subtle manifestations of this with consumers seeking reassurances regarding **food safety**, something that for many was taken for granted.

The foundational work by Theodore Maslow on the *hierarchy of needs* puts safety behind physiological needs, one might argue that the safety need is for now, at least temporarily, paramount. For brands and businesses, it is important to recognise how this will manifest itself in consumer choices in Covid-time and beyond. What will we need to do to respond to this evolving consumer reorientation? Focus on:

TRUST **>** **SAFETY** **<** TRANSPARENCY

We call this early indicator “**Simply Safe”**.

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#3 Simply Safer

Food Safety is playing a role of growing importance for consumers.



Anna Shvets @ pexels.com

57%

of adults in the UAE feel the food and drink bought "being sealed and not touched" is more important now

Bord Bia Indicators Barometer, Oct 2020

56%

of adults in the UAE feel the food safety standards are more important now

Bord Bia Indicators Barometer, Oct 2020

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#3 SIMPLY SAFE

So what should we do about it?

We all hope that the Coronavirus dissipates before long. However, it is likely that many of the changes in consumer needs will persist well beyond the crisis.

"This global crisis will fundamentally change how we think, behave, and consume. There is no rapid return to normal. The new world will have trust at its core". **(Richard Edelman)**

Brands should redouble their efforts to build trust and transparency into their DNA and to leverage any national and proprietary assets at their disposal for now and for the future.

Forrester believe that now is the time to build that trust in words and actions by prioritising consumer's wellbeing; including safety.

And it's important to get this right. *"Nearly two-thirds (65%) saying how brands respond to the pandemic will have a "huge impact" on their likelihood to buy their products"*. (Campaignlive/Edelman)

52%

of adults in the UAE feel the traceability of their food and drink is more important

Bord Bia Indicators Barometer, Oct 2020

36%

of adults in the UAE are choosing brands they know and trust more often

Bord Bia Indicators Barometer, Oct 2020

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#3 Simply Safer

Provenance is an important part of the safety story too and presents an opportunity for Ireland. While there is still limited awareness of Ireland produce, it demonstrates relative strength around its association, in particular, with clean air and animal welfare, but has work to be done in building trust and safety credentials.

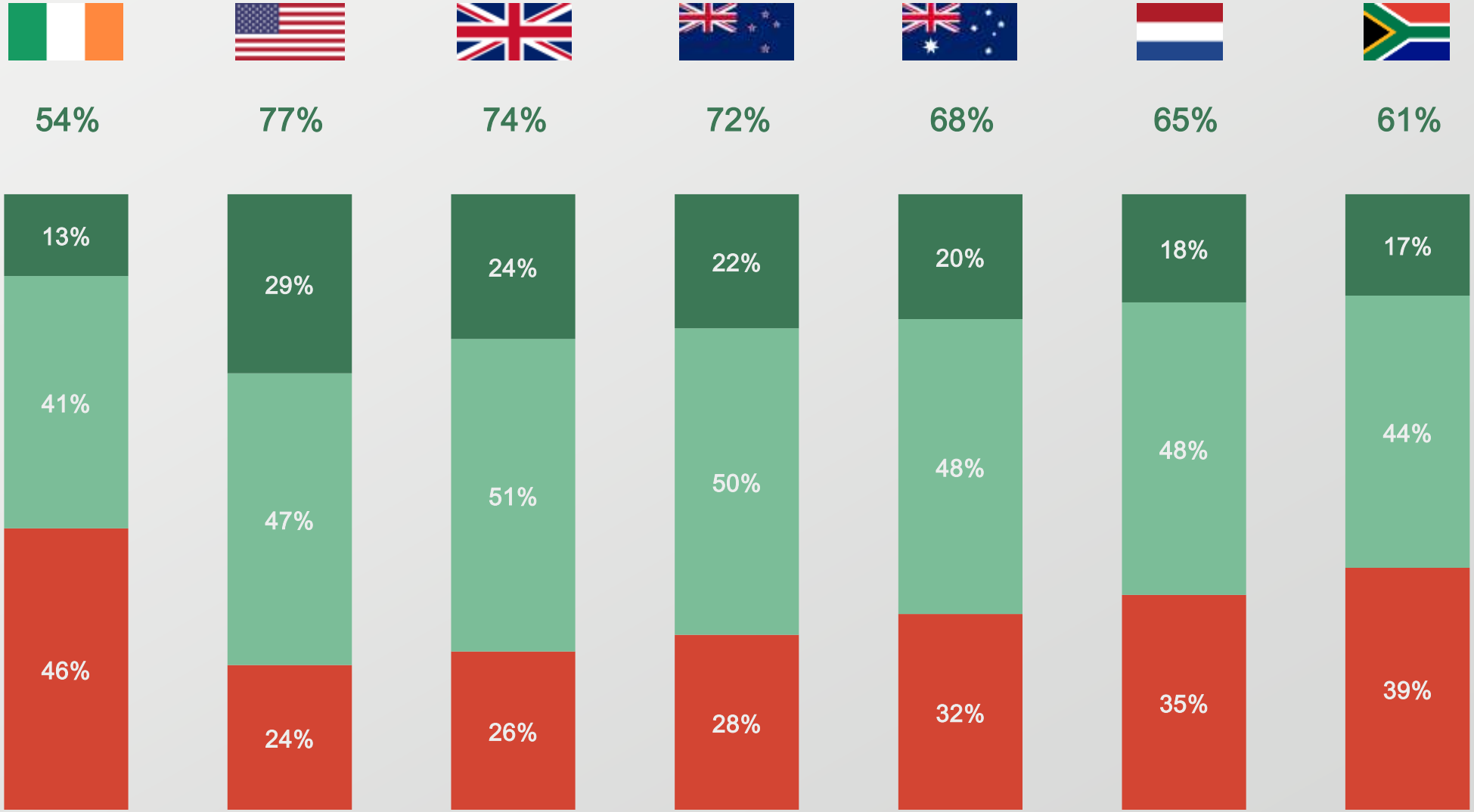


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Familiarity with Food & Drink Origins

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



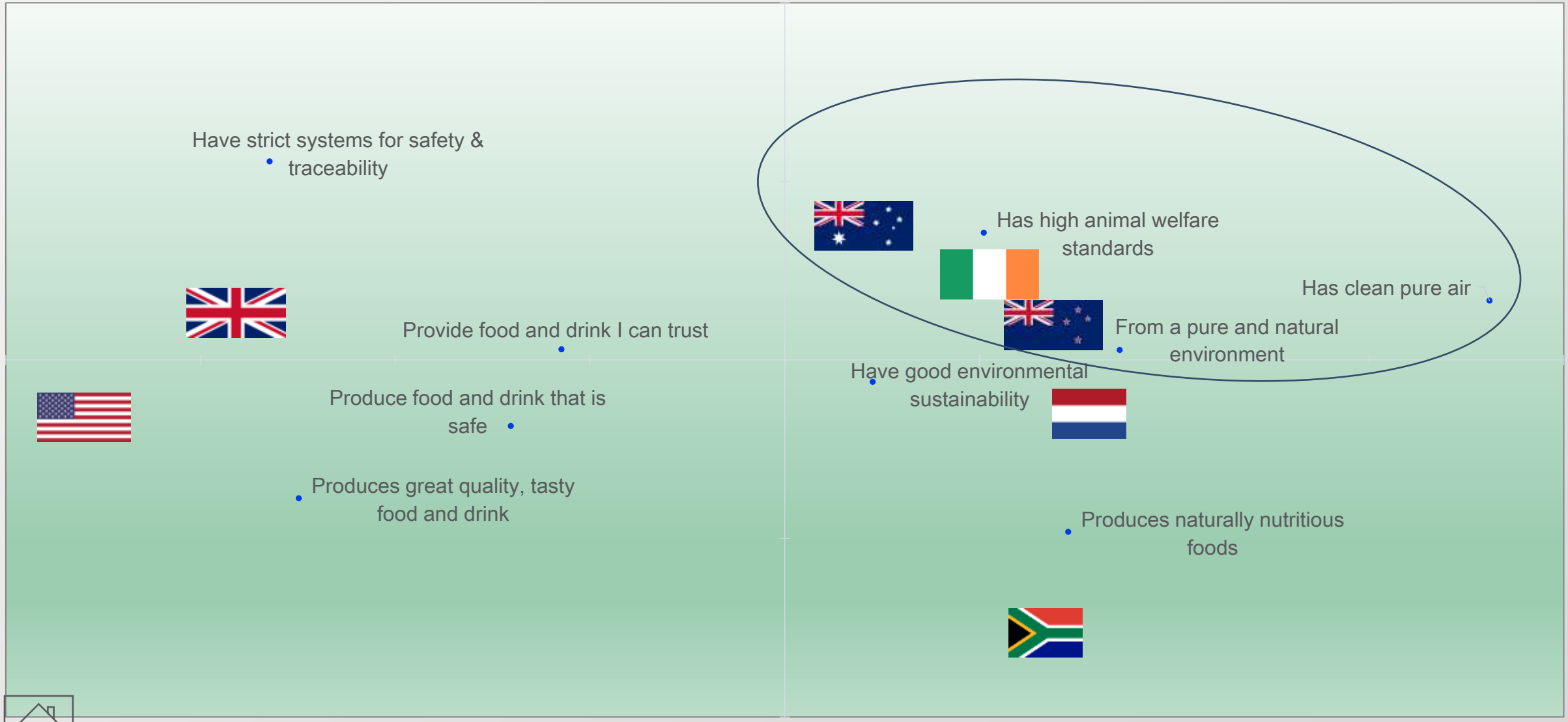
Finally, when it comes to buying imported food and drink in UAE, how familiar are you with each of these overseas sources of food and drink?

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Mapping Associations to Origins

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



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Indicators

Coronavirus COVID-19

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Exploration of the UAE market. October 2020



#3 Simply Safe.

Consumers are looking for security in simplicity, transparency and familiarity

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Image by PublicDomainPictures from Pixabay

Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020



#4 Trace Tech.

Consumers are sharing their data in new ways

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Image by PublicDomainPictures from Pixabay

#4 TRACE TECH

Data privacy and how we manage it is changing.

As the Covid-19 crisis deepens, governments across Europe have rolled out, or plan to launch, phone-tracking apps to trace people who came into contact with those infected and to monitor people under quarantine. Technology was central to how governments in Asia tackled their outbreaks. Chinese consumers are, in many ways, ahead of consumers in the West when it comes to tech based payment systems, online retailing and social networking.

The measures have triggered criticism from some data privacy activists who worry that they may become permanent once the coronavirus crisis is over, while others doubt they will be effective unless most people agree to use them. They argue we are moving into a world where “Big Brother” truly is watching.

The European Data Protection Supervisor (EDPS) says the use of temporary broadcast identifiers and bluetooth technology for contact tracing protected both privacy and personal data. All of this points to a new world where people’s data and the privacy of that data may well play a key role in ‘flattening the curve’ here in Europe. Understanding how people adopt new data-sharing technology will help us understand how food consumption and data will merge in the future.

We call this Indicator **TRACE TECH**.

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#4 TRACE TECH

Asian health services have led the way on tech based solutions.

Before the rest of the world was consumed by the Covid-19 crisis, health services in China were embracing app based technology to tackle contact tracing. In early Feb, Chinese authorities launched an app that allows people to check whether they have been at risk of catching the coronavirus.

The 'close contact detector' in China's WeChat app tells users if they have been near a person who has been confirmed or suspected of having the virus. To make an inquiry, users scan a Quick Response (QR) code on their smartphones using apps like the payment service Alipay or social media platform WeChat.

Singapore soon followed with their TraceTogether app, a similar contact tracing app that was downloaded 1m times in the first five days of its life.

While in South Korea, the government has created a publicly available map from cellphone data that people can use to determine if they have come into contact with someone who has been infected with the novel coronavirus.







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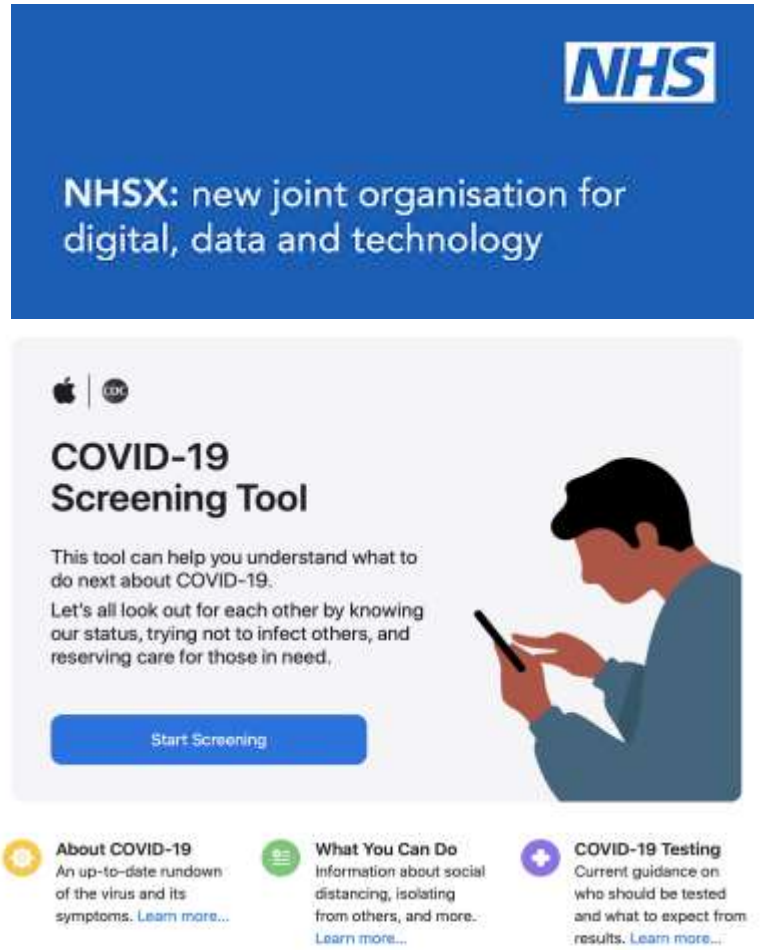
#4 TRACE TECH

Contact tracing apps have been developed globally.

In the UK, a government-backed project — which users would opt into — under way and could be launched within weeks, while the US has a growing range of projects across multiple states.

NHSX, the innovation arm of the NHS is leading the project in the UK and is hoping that at least 50 per cent of the population will sign-up for their app.

Whilst in the US, Apple have developed a Covid-19 screening tool app in partnership with the Centers for Disease Control and Prevention, the White House coronavirus task force and the Federal Emergency Management Agency.



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#4 TRACE TECH

GPS data makes tracking movements possible.

From April 3rd, Google is making available aggregated and anonymous data just like it collects from my smartphone's location history to provide a picture of how millions are making journeys across 131 countries.

Google said these Covid-19 Community Mobility Reports "show recent trends (over the past 48 to 72 hours) of the percentage increase or decrease in visits to places like retail stores, recreation spots, groceries and pharmacies, parks, workplaces and residential locations".

The aim is to provide information to public health officials so they can make adjustments to opening hours and transport availability to aid social distancing measures.

Trends are also being provided over several weeks. In Ireland, this data is being provided county by county. We are moving into a world where 'monitoring our movements' is very much the norm.

Google



Source: Google Mobility Report (Ireland)

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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#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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Exploration of the UAE market. October 2020

#5 The New Social.

Consumers are embracing technology to fight social distancing



Photo by Sergey Zolkin on Unsplash

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#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 37% now working from home in some capacity, that would not have been the case pre Covid-19, and 56% missing colleagues, people are craving real company.



72%

TOP THING PEOPLE MISS is spending time with friends

Bord Bia Indicators Barometer, Oct 2020

65%

of adults in the UAE miss eating out in formal restaurants

Bord Bia Indicators Barometer. Oct 2020

60%

of adults in the UAE miss eating out in fast food restaurants

Bord Bia Indicators Barometer, Oct 2020

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mentatdgt@pexels.com

#5 The New Social…staying in is the new going out..?

For a region with a healthy amount of socialising and where 60% of the population eat out once a week – the recent restrictions have meant businesses and locals have had to adapt to new forms of going out.

With restaurants being forced to shut and to avoid being at the mercy of the food delivery aggregators, businesses have had to get creative with their delivery options.

Virtual quiz nights, brunches and paint classes have all become part of the virtual social tapestry emerging in the UAE. Businesses have created new online features enabling people to connect to these new social activities.

Wagamama are looking at a future where dining in will become a norm for now, and are looking at the creation of meal kits with their successful launch of their virtual cookery classes.

Streaming live events and building home entertainment and added value into a food service offering, may be something that could take off.



wagamama

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https://www.thenational.ae/lifestyle/food/virtual-brunches-and-delivery-meal-kits-what-dubai-s-food-industry-might-look-like-in-a-post-covid-world-1.1007235

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

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

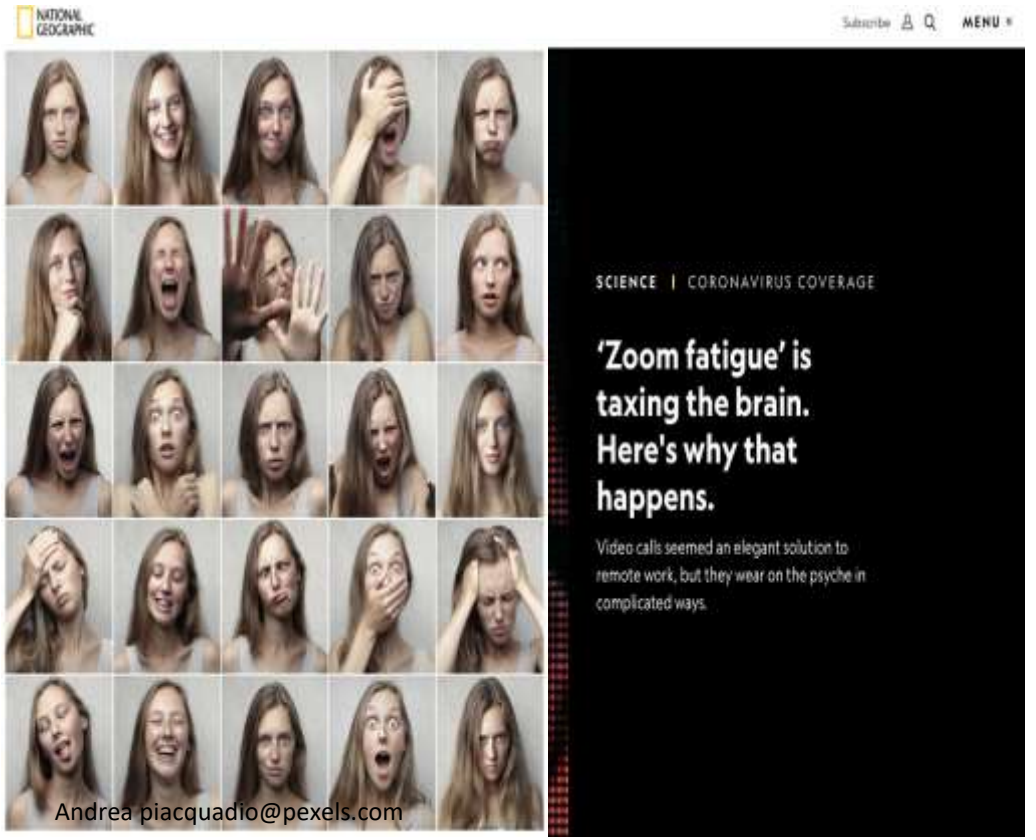
Virtual interactions can actually be hard on the brain says Andrew Franklin, an assistant professor of cyberpsychology at Virginia’s Norfolk State University.

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 it’s less likely that we are going to be “booking” zoom time for chats with friends into the future.

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



Andrea piacquadio@pexels.com

Indicators

Coronavirus COVID-19

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#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

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#6 Stocking-In.

How grocery shopping evolves from panic to preparedness

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Image by Alexas_Fotos from Pixabay

#6 Stocking-In

Stockpiling has become a global phenomenon since the emergence of Covid-19. Stories began to emerge in February from around the world of people stockpiling products, with Australian's stockpiling of toilet paper materialising as one of the big headlines in the early phases of the outbreak.

In the UK, the massive stockpiling resulted in more than 79 million extra shopping trips, where consumers spent a massive £1.9 billion on groceries than a year ago, pressuring manufacturers, retailers and the entire supply chain.

Such has been the panic, that many stores have had to introduce rationing systems putting a limit on the purchasing of certain goods. Many media stories have been published to instil a sense of calm with reassuring messaging.

Globally, shoppers have been Stocking-Up on food and beverages to create what has been dubbed "Pandemic Pantries". One could be forgiven for assuming shopping has moved into panic-buying with shopper missions driven by a need to stay 'stocked-up' at home. But the truth behind changing consumer behaviour is a little more complex - moving from panic to preparedness. We call this evolved grocery shopper behaviour STOCKING-IN.

#6 Stocking-In

Nothing new in panic buying…

Covid-19 has born witness to just the latest episode of stockpiling to emerge in recent years – albeit the most extreme episode. During the recent 'Beast From The East' storm and more recently Brexit all encouraging this behaviour, UK shoppers have demonstrated a tendency to stock-pile. 21% of UK consumers, according to Mintel said they stockpiled products ahead of the 31st of October Brexit deadline.

Panic Buying is characterised as a response to peoples 'fears of the unknown'; it is often just the first phase of stockpiling behaviour where consumers are very much focused on taking control of the unknown. The Journal of Consumer Research describes this phenomenon as **Control Deprivation**.

According to Nielsen, early purchases tend to be of shelf-stable produce with UK sales of shelf-stable foods up 6% compared to the same time last year, as well as compared to January 2020. This includes pasta, rice and sauces (up by 5%), jams and spreads (5%) and canned vegetables, which are up 7% on last year, rising to 11% compared with January 2020. Packaged bread sales are also up (7%) in comparison to last year (Nielsen UK).

Stocking up in this phase often manifests as **bulk buying** – larger pack sizes, dual packs. This all speaks to a conversation that allow consumers feel like they are more in control. But this behaviour often evolves into more subtle manifestations of stockpiling….

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Image by ElasticComputeFarm from Pixabay

#6 Stocking-In

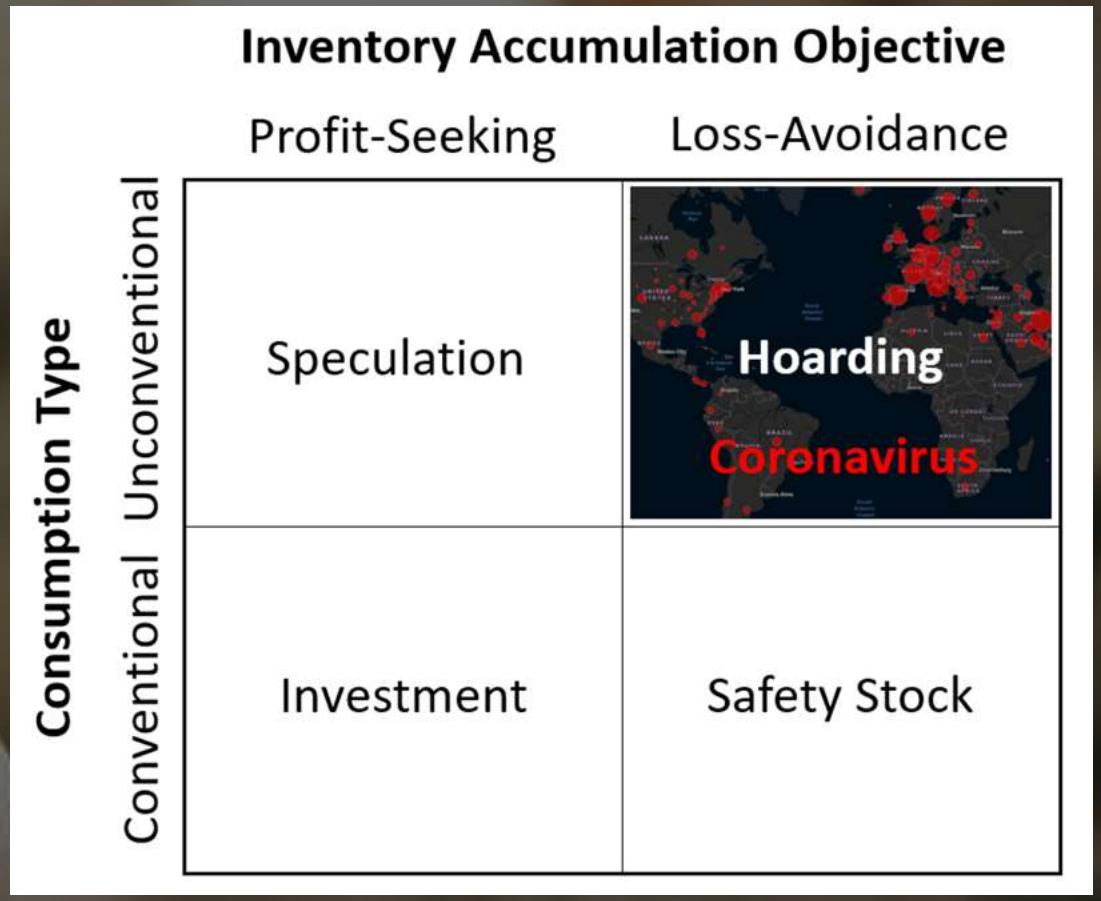
Phase 1 - Hoarding

The headline grabbers around this whole topic of stockpiling are pretty universally about one topic; Hoarding.

This behaviour can be explained using commodity theory and prospect theory. Commodity theory proposes that the value of a product is positively related to its scarcity, so perceived shortages may stimulate stockpiling behaviour.

Prospect theory describes how people are risk averse when choosing between uncertain alternatives. To avoid potential losses in the face of uncertainty from the coronavirus outbreak, consumers may stockpile or hoard essential items.

Source: https://theconversation.com/when-the-coronavirus-gets-tough-the-tough-get-stockpiling-133419.



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#6 Stocking-In

With strict curfews, *especially in the early phases with fears around ongoing food availability*, Stocking-In has become a more prevalent part of life in the UAE.

33%

of adults in the UAE are keeping a rolling stockpile of food at home
Bord Bia Indicators Barometer, Oct 2020

36%

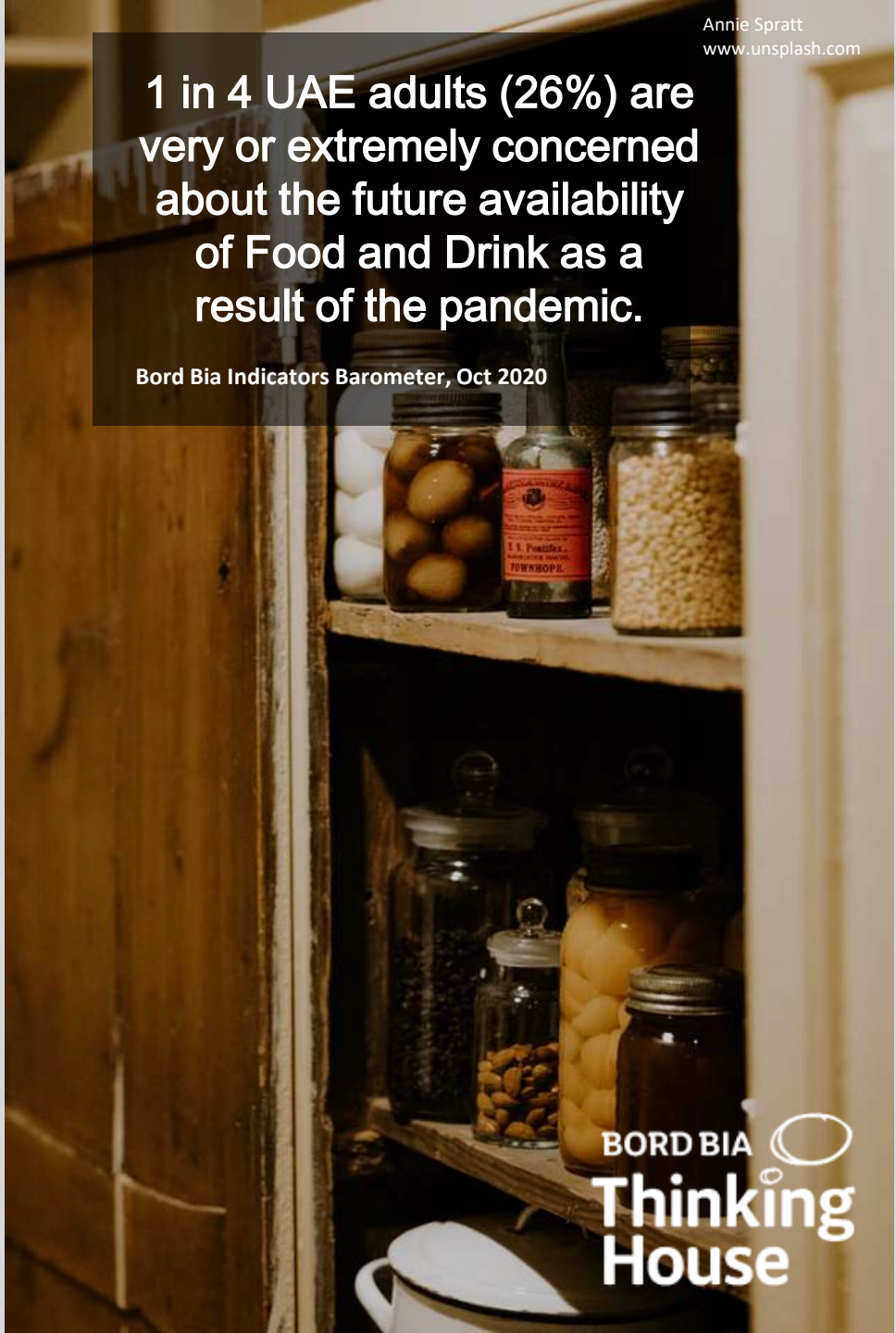
of adults in the UAE are stocking up on food and drink for their home
Bord Bia Indicators Barometer, Oct 2020

48%

of adults in the UAE say its more important now that the food and drink they buy for their home has a long shelf life
Bord Bia Indicators Barometer, Oct 2020

26%

of adults in the UAE are buying less frozen food
Bord Bia Indicators Barometer, Oct 2020



Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#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

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From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#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

Shoppers are shying away from produce on display for all to touch.

Coronavirus (Covid-19) is causing untold tension in every aspect of our lives and shopping is no different. The wonderfully appetising displays of culinary delights we love to engage with in stores, deli counters and other food service outlets; to touch, smell and taste are on hold for now.

Shoppers are avoiding unpackaged produce to avoid the risk of contamination and we have been seeing the stores reacting to this already, with the fresh bakery offerings packaged and over-the-counter produce sealed and protected from human contact. According to Jon Bird in Forbes, *“Shoppers today don’t want to touch anything apart from their own mobile phones (which, somewhat ironically, can be “10 Times Dirtier Than A Toilet Seat”.)*

While this seems like a severe response, microbiologist Charles Gerba thinks they’re right claiming that the fresh produce area is among the “germiest” areas of the grocery store; “I don’t know anyone who buys produce without squeezing or touching it,” says Dr Charles Gerba Microbiologist.

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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.

36%

of adults in the UAE are minimising their trips to the shops
Bord Bia Indicators Barometer, Oct 2020

39%

of adults in the UAE are doing more self-service check out in store
Bord Bia Indicators Barometer, Oct 2020

61%

of adults in the UAE are using contactless payments more often
Bord Bia Indicators Barometer, Oct 2020



Walmart
As shoppers put safety first, supermarkets are adapting to consumer demands for a more hygienic and streamlined in-store experience. Walmart's functional app-led store redesign reconfigures grocery shopping away from the experiential to a more seamless, touch-free and functional experience.

x2

Walmart's e-commerce sales nearly doubled in Q2, largely thanks to curbside pick-up.

Source: Fortune

200

Walmart stores will adopt the new design this year, adding 800 more next year.

Source: Fortune

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



IGD RetailAnalysis

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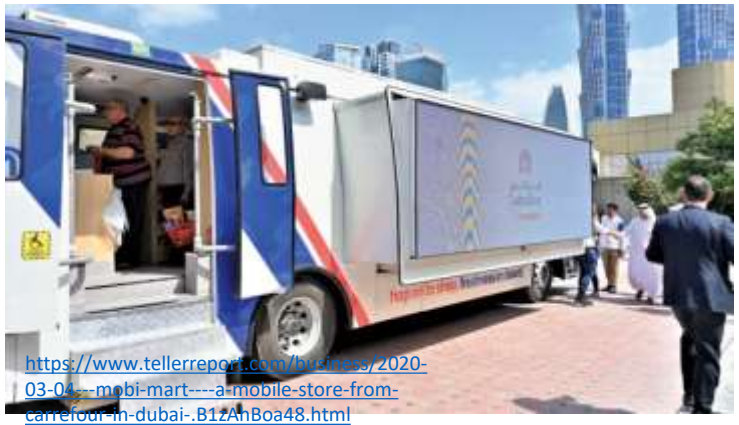
Image by Negative Space from Pexels

#7 Risky Business

Carrefour 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-.B1zAnBoa48.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.

42%

of adults in the UAE are avoiding of food on open display more often

Bord Bia Indicators Barometer, Oct 2020

57%

of adults in the UAE feel the food and drink they buy “being sealed and not touched” is more important now

Bord Bia Indicators Barometer, Oct 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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#7 Risky Business

UAE shoppers have confidence in the measures that have been put in place to ensure safety standards are adhered too. With more than 10,000 inspections across the municipality in less than three months, and more than 100 outlets closed at one point, all food outlets are ensuring the best in class standards are being maintained by using symbols and schemes to inspire confidence in shoppers.

93%

of residents in Abu Dhabi have confidence in the Emirates food security standards during the Covid-19 pandemic

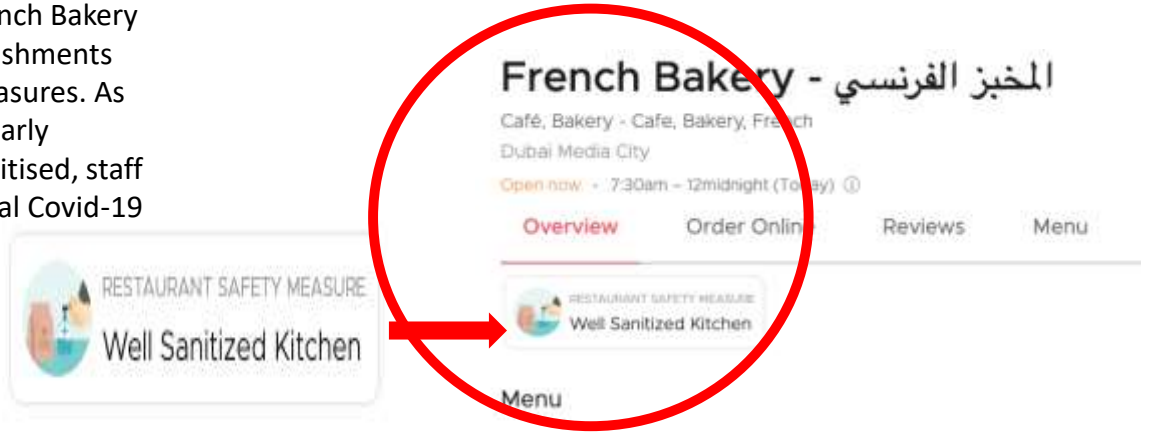
Abu Dhabi Agriculture and Food Safety Authority

58%

are happy with the precautionary measures put in place to ensure food safety

Abu Dhabi Agriculture and Food Safety Authority

With mixed messages around bakery and hygiene concerns, French Bakery Dubai is among the establishments to impose strict safety measures. As well as all staff being regularly screened and bakeries sanitised, staff have been trained in special Covid-19 safety measures.



Recently Abu Dhabi launched its “Go Safe” Programme developed by the Department of Culture and Tourism with the aim of driving global standards of hygiene and cleanliness at hotels and venues across the emirate.

Go Safe

Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#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
- Creating symbols/seals and certification programmes that guarantee confidence

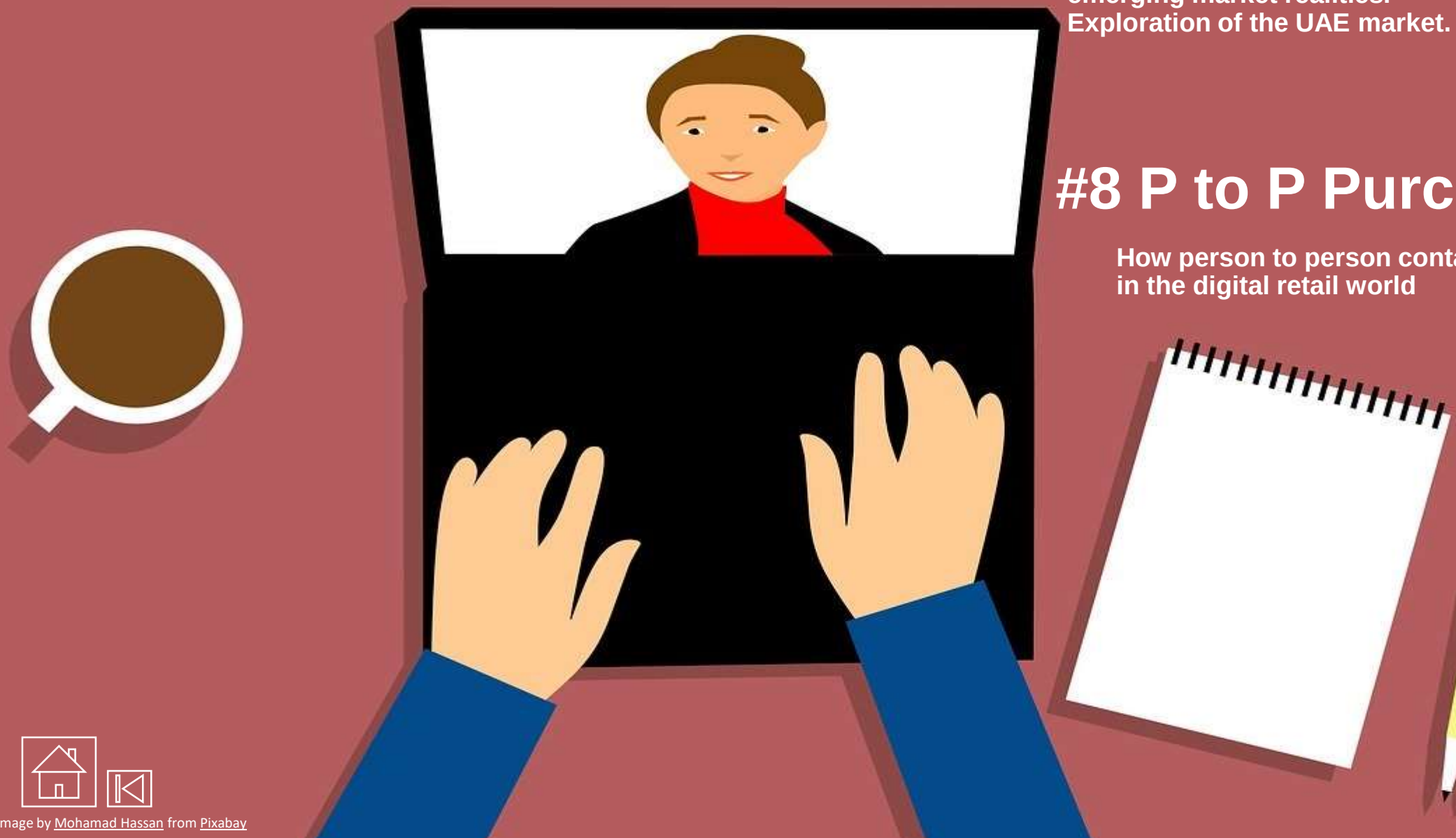
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Photo by Kate Remmer on Unsplash

Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020



#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

Image by Negative Space from Pexels

#8 P to P Purchasing

As online shopping increases, we are experiencing customer service in new ways.

Many brands and businesses are creating new innovative platforms for consumer engagement. A growing range of interactive and consultative services are now on offer that can really enhance the shopping experience. We are seeing a growing array of influencers and voices of authority emerge online throughout the crisis from the world of science right through to brands we follow online and within our own personal social media networks.

Consideration for who an expert is - is being scrutinised more - in a world where people are despairing of ongoing fake news and also crave and value authenticity. According to Edelman, 57% of people around the world feel that the media they use is contaminated with untrustworthy information. (Edelman, 2020).

Authority Bias is very much at play here and we see many people putting trust in scientists as the new heroes, as we rely on them to take us out of this crisis and provide us with transparent honest facts.

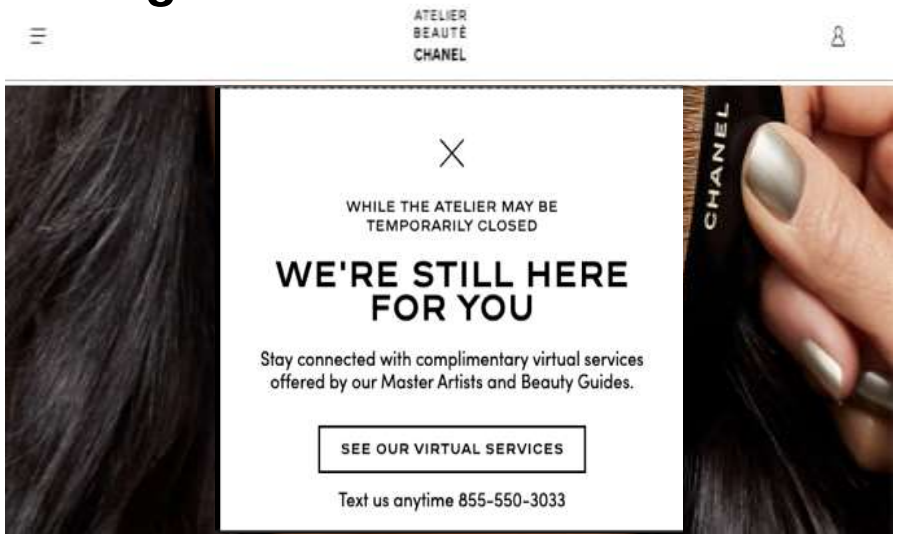
Understanding this behaviour is also important when it comes to shopping. As consumers become more savvy as to how to shop online, **Differential Bias** will become more evident in who they seek to believe and who is likely to influence them. Online consultations could play an integral role here in creating brand differentiation.

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#8 P to P Purchasing

Beauty brands have been at the vanguard of P to P purchasing online.

Chanel have been leading the way. Skin care addicts and make up junkies need not fret as Chanel take their **Atelier Beaute** Wooster Street store online providing one to one consultations with “Master Artists” for $20 and skin care routine chats for $18.00. A clever way to win new customers, drive loyalty and enable people to feel special.



Credo, the clean beauty brand which calls itself the “largest clean beauty store on the planet” has also been leveraging their online e-commerce platform. The agility of the service provides both a bespoke and speedy service offering. Chats are timed to be brief providing a range of services including shade matching and skin advice. Consultants navigate consumers directly to recommended product pages.



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#8 P to P Purchasing

P to P Goes Live In China In Response to Covid-19.

As supply chains became disrupted, a growing number of farmers in China have looked for innovative ways to ensure consumers get fresh produce.

According to Alizila, livestreaming, in particular, has become a popular tool for selling fruits and vegetables that would have otherwise gone to waste. Since launching its Rural Support Program on Feb. 6, Alizila says the Alibaba Group has opened up its Taobao Live platform to **farmers for free**.

Taobao also opened up its Foodie Livestream channel to connect farmers across China with its 41 million followers. 15 million kg of products were sold during the first three days of livestreaming. The channel has been promoting farm-fresh produce daily ever since – providing reassurance and much needed **Authority**.



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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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Image by Negative Space from Pexels

#8 P to Bot Communication

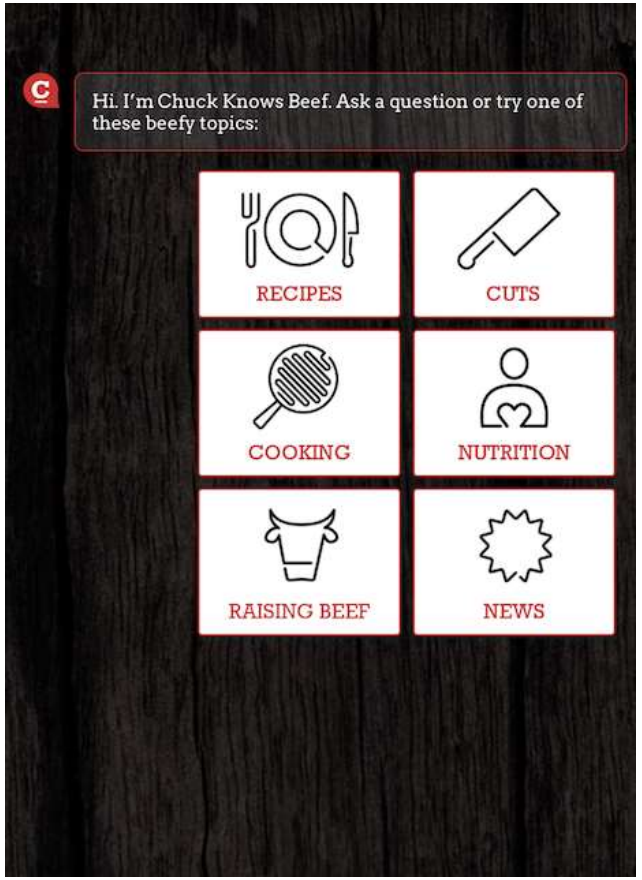
And AI has already been embraced to deliver a virtual butcher for consumers.

In the US, Chuck Knows Beef is the virtual creation of the *Beef. It's What's for Dinner.* campaign.

Chuck is a virtual assistant that consumers can interact with in a variety of ways. He's got his own website — **chuckknowsbeef.com** — available on both desktop and mobile devices, as well as connected home devices with Google Assistant or Amazon Alexa.

Although retailers might have **highly knowledgeable staff** of their own behind the counter, that doesn't necessarily mean that customers will approach them with questions.

According to Winsight, consumers, especially Millennials and Gen Z, are increasingly reliant on digital sources of information as part of their shopping journeys. AI could be the answer for younger consumers looking for **sources of authority** on meat preparation.



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#8 P to P Purchasing

KarolinaGrabowska@pexels.com

Online grocery shopping has become one of the strongest behaviours to emerge during Covid-19 and appears very strong in the UAE.



With safety a concern, many people have now migrated online to do their shopping.

49%

of adults in the UAE are grocery shopping online more now as a result of Covid-19

Source: Bord Bia Indicators Barometer, Oct 2020

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#8 P to P Purchasing

73%

of consumers agree with the statement that they use augmented reality to enhance their shopping experience

Euromonitor International Lifestyle Surveys 2019

60%

of industry representatives believe the increase in online shopping is likely to be a permanent trend

Euromonitor Internationals Voice of the Industry Survey, April 2020

Try before you buy online is something we may see more of in the UAE in the future.

48% of consumers will increase their use of online payments for e-commerce purchases according to a study by Dubai Police, Dubai Economy and Visa (June 2020).

Developing new ways to give customers an enhanced shopping experience will be important but also ensuring that they can have confidence in making the right decisions, especially at the luxury end of the market.

Equally well growing concerns around hygiene may create barriers to shopping and so enabling consumers to have that almost “touch like” experience is important.

And so AR try on is something that we might see take off some more with luxury brands already playing in this space. In fact, AR try-on technologies have been found to increase conversion, with Canadian e-commerce platform Shopify claiming that consumers who viewed a product in AR were twice as likely to convert compared to those who didn’t (Shopify, 2019).

Gucci working with Snapchat’s AR “try on” lens allows customers to see how sneakers look on their feet. This technology is available to consumers in the UAE who are on Snapchat already.

https://www.stylus.com/gucci-partners-with-snapchat-for-ar-tryon



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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#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

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Exploration of the UAE market. October 2020

#9 Proxy Purchasing.

How shopping for the cocooned changes our behaviour



Image by Jesse Yelin from Pexels

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#9 Proxy Purchasing

An army of shoppers bravely going where no cocooners can go…

There are currently over 460,000 people aged over 70 in the country who receive a pension. Most, of those people should be cocooning at the moment in response to the HSE guidelines around Covid-19. Although we don't currently have data on how many of these people have stopped doing their own grocery shopping, it is safe to assume a significant proportion now rely on family or friends to shop for them.

Grocery shopping for an older relative – or indeed anyone other than your own household – throws up a range of different scenarios for behavioural change. How do you choose the right brand of washing powder? What is their preferred brand of tea? What size milk will they go through in a week? How much fresh veg is enough to get them by? And how much is too little?

A number of psychological factors can come into play. Decision-theory talks about a phenomenon known as 'Warm Glow'; how people derive personal satisfaction from giving. Cognition theory talks about how shopping lists safeguard against 'Dissonance'. The exact impact of shopping for the cocooned is yet to be fully understood but perhaps we have some behavioural clues.

We call this indicator PROXY PURCHASING.

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#8 Proxy Purchasing

Getting that Warm Glow.

‘Warm-Glow’ giving, refers to prosocial behaviour that causes donors to experience positive feelings, irrespective of whether their giving actually makes a difference.

This is the personal satisfaction for having ‘**done the right thing**’: you give up what is rightfully yours for a philanthropic cause and you feel good about it.

And this ‘warm-glow’ is also a very real neurological response. Research from the University of Zurich has shown through brain imaging that small acts of generous behaviour cause the brain of the person giving to light up with a ‘warm glow’ marked by increased levels of happiness.

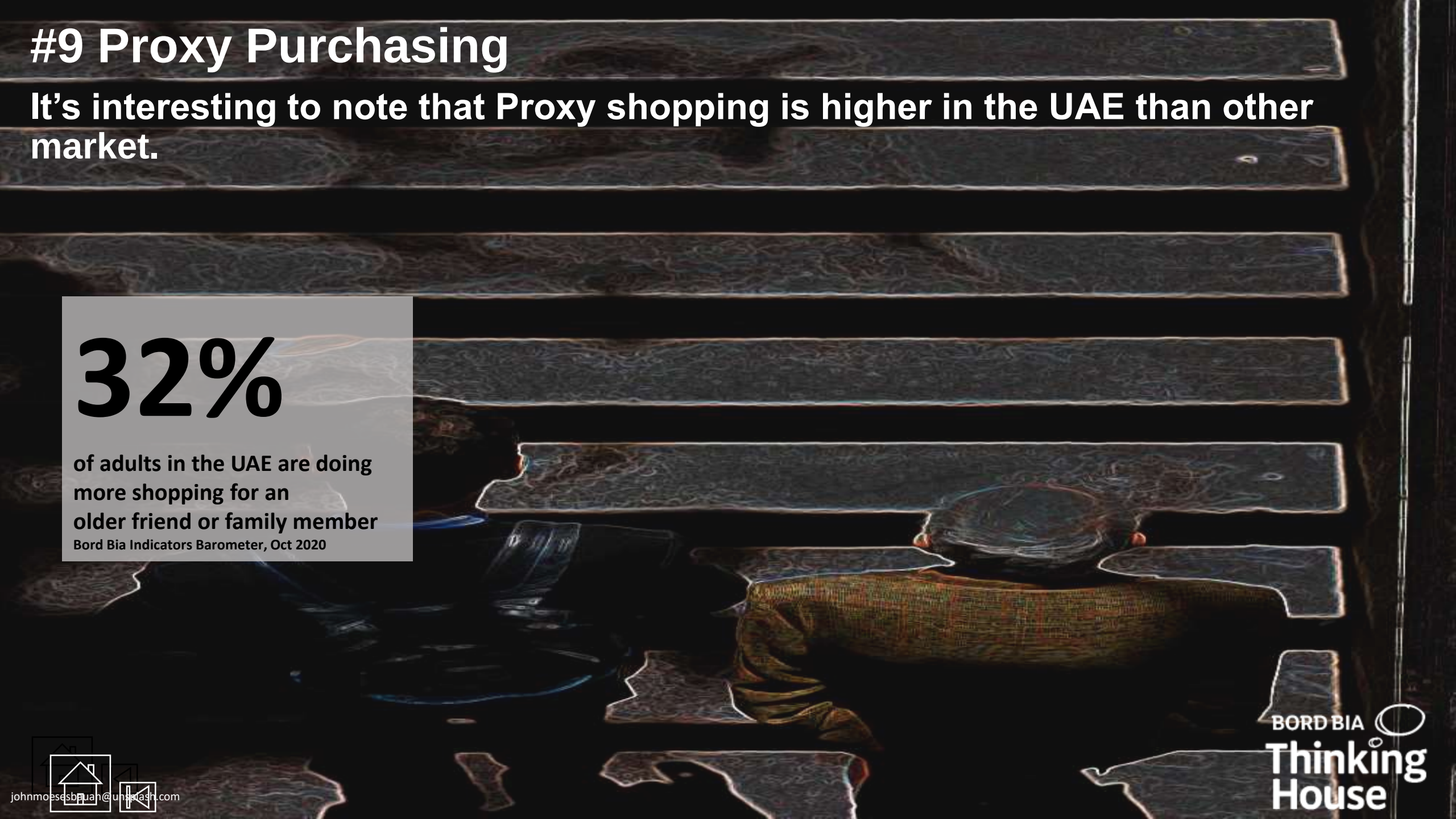
The brain imaging data also showed that Scrooge-ish people — who acted solely out of self-interest — were less happy and did not emit a warm glow. So there you have it, the next time you throw a few extra custard creams in your cocooners’ basket watch out for that warm glow…



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#9 Proxy Purchasing

It’s interesting to note that Proxy shopping is higher in the UAE than other market.



32%

of adults in the UAE are doing more shopping for an older friend or family member

Bord Bia Indicators Barometer, Oct 2020

johnmoesesbauan@unsplash.com

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Coronavirus COVID-19

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#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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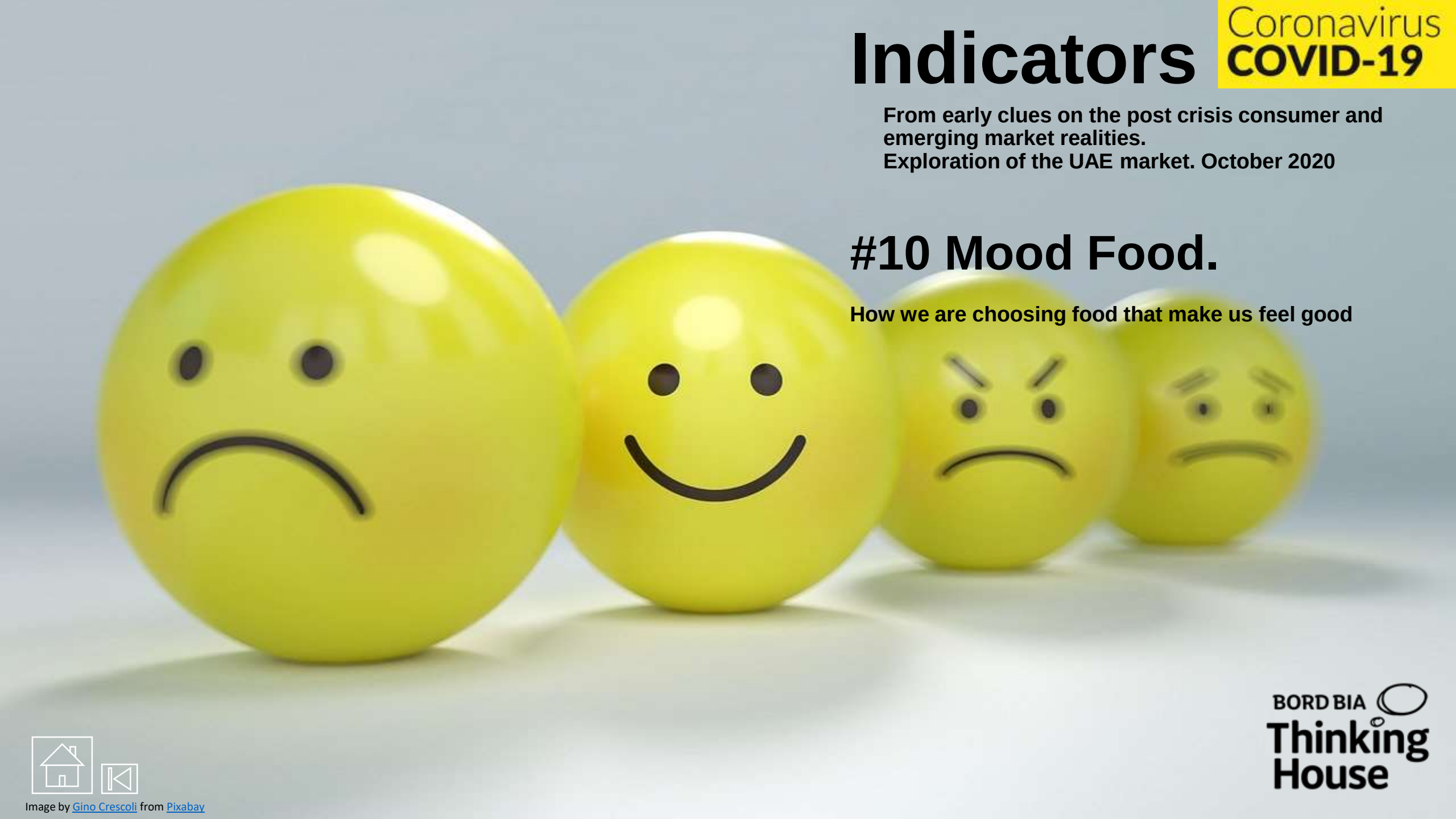
Indicators

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#10 Mood Food.

How we are choosing food that make us feel good



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Image by Gino Crescoli from Pixabay

#10 Mood Food

We've probably all heard the phrase 'emotional eating' before but do we really understand the science behind this phenomenon? Is this consumer behaviour as simple as 'treating'? Are we all doomed to seek out chocolate for that serotonin boost the longer this lockdown goes on?

Emotion definitely plays a role in the food choices we make and is central to **Coping Strategies** we all adopt in times of crisis. **Escapism** is one such **Coping Strategy** that can reveal some clues to how consumption behaviour may be shifting since lockdown began.

Behavioural Science and **Hedonic Consumption** shows us that consumers may be seeking out sensory pleasure from their food and drink choices. The science of **Reward** shows us that **Hyperbolic Discounting** drives people to 'smaller' more immediate benefits from their choices.

We can't be sure just yet how consumption behaviour has shifted in the midst of this unique time in all of our lives but we can look at some early clues.

We call this indicator MOOD FOOD.

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#10 Mood Food

The Science of Escapism.

Escapism functions as a coping mechanism when consumers are confronted with external stressors that threaten either their sense of identity or control. According to the Journal of Consumer Research, there are two forms of escapism – Passive and Active.

Passive Escapism involves consumers acting as observers; classic examples here would be watching TV or watching a movie. However, **Active Escapism** provide a more interesting mode of behaviour to help us understand the impact of this phenomenon on food consumption behaviour.

While other forms of emotion-focused coping relieve stress through psychological avoidance (i.e. refocusing of attention away from stressors), Active Escapism provides the benefits of affirmation and empowerment.

The consumer who engages in **Active Escapism** enjoys a sense of achievement, they DO something that brings them to better place. In the current context, that is away from the world of lockdown and potentially off on their travels to a better 'imagined' other…

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#10 Mood Food

Travel through food

With people unable to leave their homes during lockdown, Google have found a dramatic decrease in search terms related to travel and outside activities.

These included such terms as 'city breaks' which has fallen by 99% since the lockdown began, 'travel insurance' (-98%), 'taxi to airport' (-97%), camping sites (-87 %) and flights (-86%).

However, searches for food recipes from far flung destinations have exploded as have ‘food journeys’ with many virtual platforms being created to enable people learn the art of cooking traditional foods from around the world.

The rise in scratch cooking is being coupled with food playing a critical role in **Active Escapism** for consumers deprived of travel…

26%

of adults in the UAE are scratch cooking more as a result of Covid-19.

Source: Bord Bia Indicators Barometer

36%

of adults in the UAE are baking more as a result of Covid-19.

Source: Bord Bia Indicators Barometer

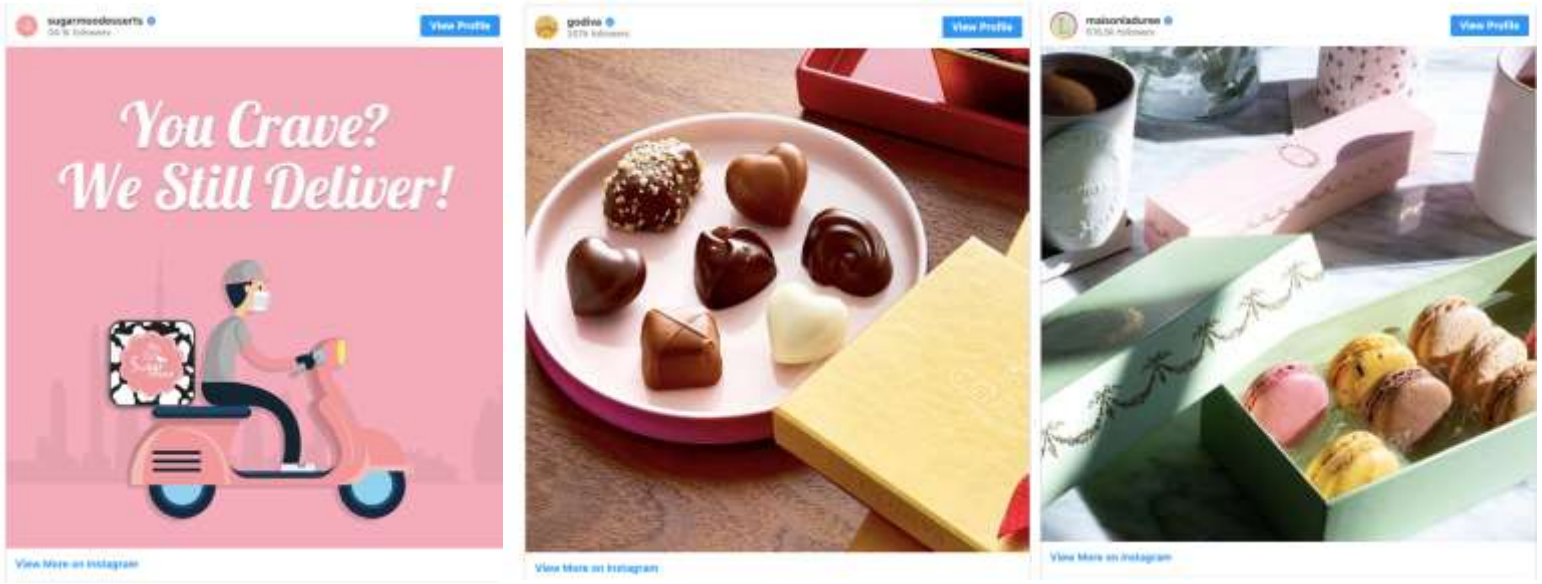
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#10 Mood Food

Hedonic consumption and small rewards prevail.

SugarMoo, a dessert only business provides treats on wheels guaranteeing delivery in 90 minutes.
A range of dessert and chocolate shops all moved online during Covid-19, from Magnolia Bakery to Godiva to Laurdee.

https://curlytales.com/beat-the-lockdown-blues-with-the-best-dessert-deliveries-in-dubai/



33%

of adults in the UAE are having sweet treats less often

Bord Bia Indicators Barometer Oct 2020

https://curlytales.com/beat-the-lockdown-blues-with-the-best-dessert-deliveries-in-dubai/

#10 Mood Food

Myopia Bias seems to be evident in the UAE, where as people have hunkered down, they have become very focused on “FRESH” food and learning about the benefits of both eating and cooking well to boost immunity and stay well, as well as having fun with food and indulging in some treats too.



“Every day me and my son are doing great things in the kitchen. Sometimes its cake sometimes its salad..sometimes cookies, every day experimenting ”
Preeti Modi, Gulf News

47%

of adults in the UAE are having fresh fruit and vegetables more often
Bord Bia Indicators Barometer, Oct 2020

31%

of adults in the UAE are having fun food more often
Source: Bord Bia Indicators Barometer



“Right now it’s a good time to give them immunity boosting foods. Berries and orange [are] these are very high in vitamin C and most of the kids, they don’t enjoy having strawberries and blueberries, so it’s a good idea to make a smoothie and give it to them in a way they enjoy, with some nuts”
Ramya Bharat, Gulf News

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Indicators

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#10 Mood Food.

How we are choosing food that make us feel good

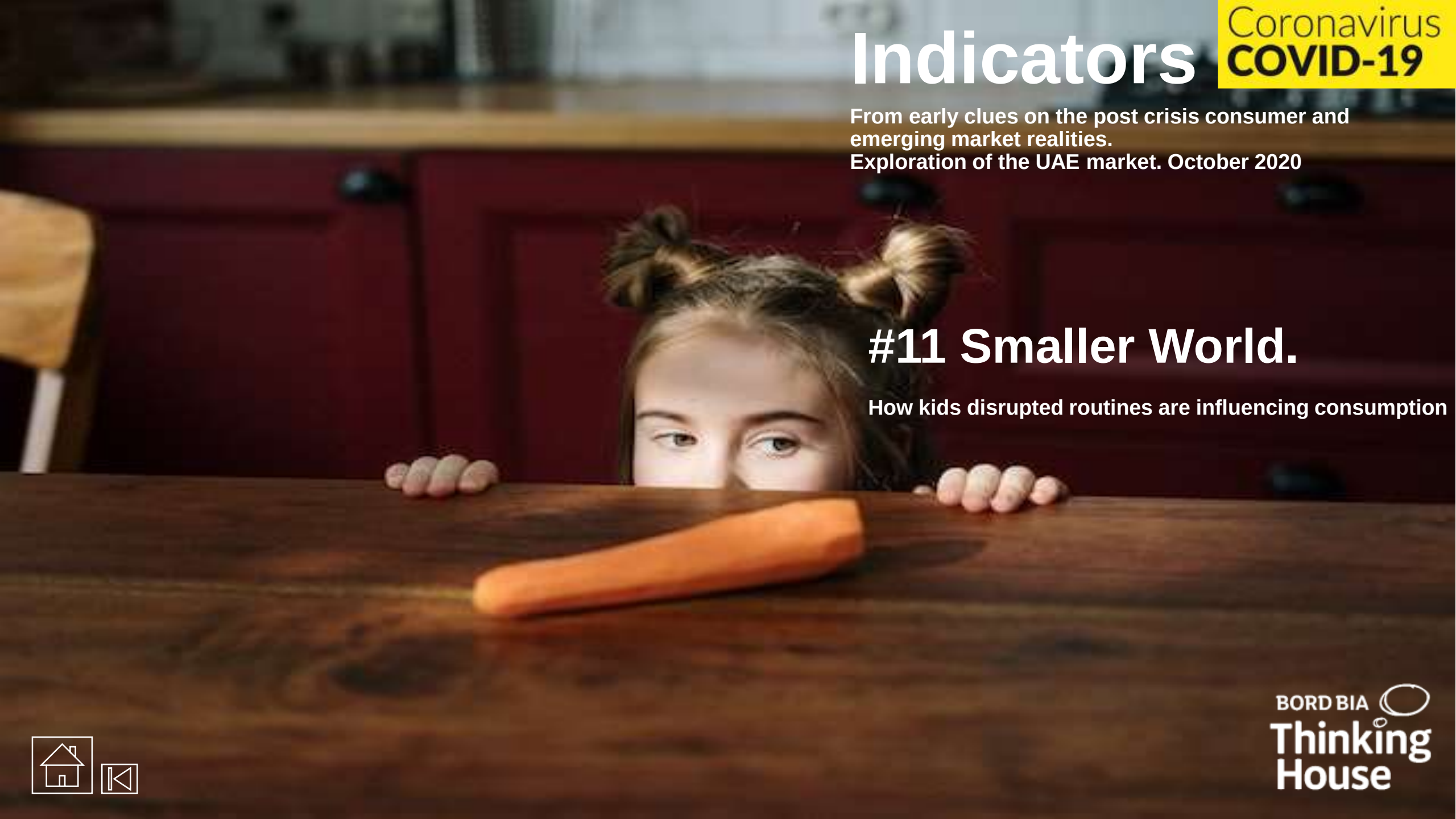


Implications for Irish Food & Beverages:

- Brands have permission to allow consumers lose some self-control
- Deliver “Active Escapism” through flavours of the world cuisine
- Develop ‘small rewards’ in foodservice, retail and direct to consumer
- And still find healthy ways to deliver ‘fresh rewards’ for immediate consumption

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Image by Gino Crescoli from Pixabay



Indicators

Coronavirus COVID-19

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#11 Smaller World.

How kids disrupted routines are influencing consumption

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#11 Smaller World

According to the United Nations, more than 1.2 billion children are at home as a result of Covid-19.

The ebb and flow of their daily lives has come to a stand still. Playdates, family gatherings, football matches, dancing classes have all grinded to a halt. Children crave **routines** and routines as they know it have had to be rebuilt together with parents, as everyone learns how to put a new structure in place that makes life as normal as possible.

The **resilience** of children is being tested like never before but they are learning about peace keeping, IT management, culinary skills to name but a few. While their lives might be different, it is also giving them a chance to dial back the pace and play in a more simple way while spending quality time with families.

As children's routines have been disrupted, so too has their consumption habits and those of their parents. We have some clues as to the changed behaviours through phenomena like Mindless Eating and Partitioning.

It's a complex topic to cover in just one indicator that we call SMALLER WORLD.

BORD BIA Thinking House

#11 Smaller World takes on health

A return to school and a return to routine is a chance to create new healthy snacks for children.

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



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

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

BORD BIA Thinking House

#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 sanitised world as well as a growing range of kids snacks for school designed to tackle gut health.



https://ie.iherb.com/

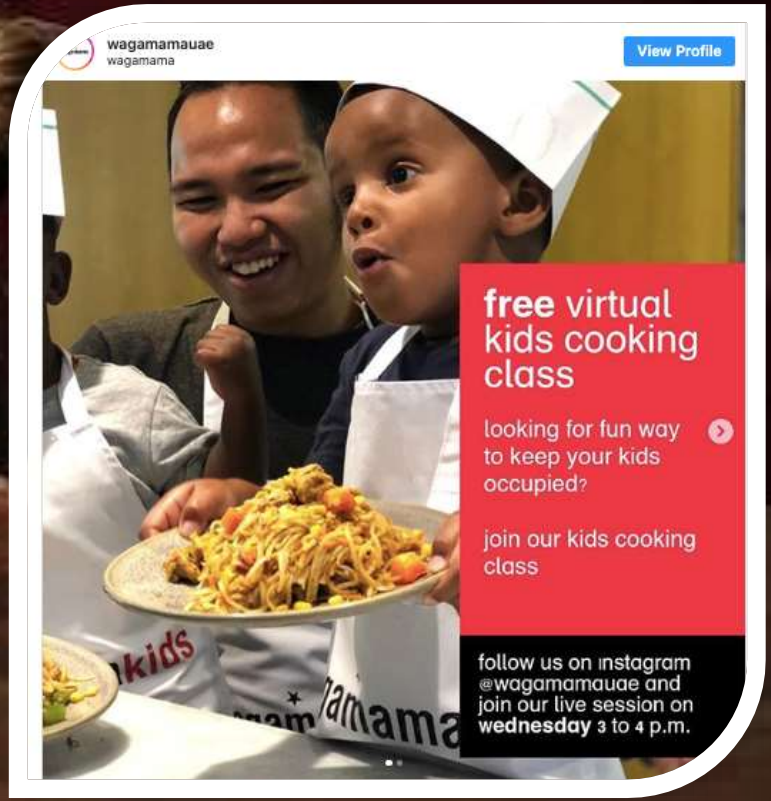
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#11 Smaller World gets larger

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 lockdown 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 online before the classes.



52%

of adults in the UAE are having quality time with family more often

Bord Bia Indicators Barometer Oct 2020

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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Exploration of the UAE market. October 2020



#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

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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#12 Waste Not...

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



Photo by Joshua Hoehne on Unsplash

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#12 WASTE NOT….

Consumers are making their food go further…..

Food Security, according to the FAO, is when we have sufficient, safe and nutritious food that is in line with our dietary needs and preferences. For much of the developed world, this is the state in which we live everyday. However, Covid-19 has been a psychological jolt to many consumers prompting a reassessment of value of food; a study by Hubbub found that 57% of people in the UK now valued food more than they did before the restrictions kicked in.

"Now that more consumers are stuck at home for longer stretches of time …… the public is highly motivated to waste less food so that their groceries can last for a longer duration," (Forbes). This Food Anxiety is something that was widely reported in the 2011 economic downturn too. The antidote is to take "confidence from being prepared" (John Wooden).

Perceived Scarcity can be a powerful behavioural motivator. In the retail environment, the manifestation of this in hoarding is well documented. However, this same powerful motivation underpins a number of interesting cooking and consumption behaviours at home that minimise waste and focus on getting more from less. For instance, a recent feature in the Guardian claims that 1 in 6 are now paying less attention to use by dates to make food go further.

We have called this indicator of behavioural change WASTE NOT…

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Photo by Joshua Hoehne on Unsplash

#12 WASTE NOT….

What drives consumer behaviour around food waste?

The drivers behind food waste are complex and can include food pricing, logistical and storage issues.

There has been plenty of research amongst consumers that has measured the degree and volume of food wasted. There also is evidence from research completed in Sweden in 2018, that Community Based Social Marketing combined with '**Nudging**' increased food waste recycling (brown bin usage).

However, the behavioural science around how consumers navigate food waste in the home is rather thin on the ground. Much of the work done on food waste tends to focus on Social Norms and the degree to which wastage of food is unacceptable amongst peer groups. This doesn't really help us in a world under-lockdown where food waste is a very hidden phenomenon.

The **Theory of Planned Behaviour** may help us understand consumers and food waste a little more. The theory suggests that behaviour is directly determined by **intentions**, which in turn are predicted by **attitudes**, **subjective norms** and **perceived behavioural control.**

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Photo by Joshua Hoehne on Unsplash

#12 WASTE NOT….

Covid-19 is encouraging people in the UAE to manage their excess and change their mind-sets around food waste, consumers are open to the idea of meal planning and budgeting which presents a real opportunity for food brands.



According to FoodNavigator.Com and the National publication, there is a huge shift in attitudes to waste in households and restaurants since Covid-19.

With people being forced to meal plan, eating out less and with limited trips to the supermarket, people are suddenly more aware and conscious of their food consumption habits, what they buy, how they cook and what they waste.

Hotels also saw a positive reduction in food waste during Ramadan. According to Dubai Municipality figures last year, food accounted for 22% of total waste produced by the Emirate, this jumped to 55% during Ramadan. Fall off in demand for buffets this year saw a decrease of waste by 80% during Ramadan.

Tackling a culture of excess is also part of the current municipality conversation with Sheikh Mohamed bin Zayed, Crown Prince of Abu Dhabi, saying the UAE must rein in its “culture of excess”.

lhttps://www.thenational.ae/uae/environment/coronavirus-outbreak-leads-to-big-shift-in-attitudes-towards-food-waste-1.1017153

https://www.foodnavigator-asia.com/Article/2020/07/01/UAE-s-COVID-19-food-trends-Less-waste-more-self-sufficiency-and-an-orange-sales-boom

arren Wong @ www.unsplash.com

#12 TO WASTE OR TO WASTE NOT

59% **of adults in the UAE believe that reduction in food waste is more important now since Covid-19. However, we are also seeing though, a growing tension emerge around packaging, as safety is taking precedence for many in making their food choices.**



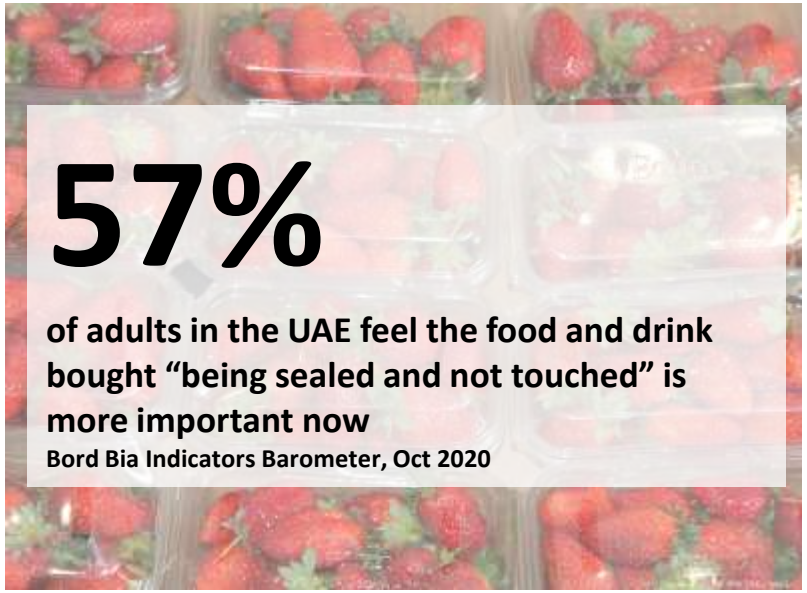
Warren Wong @ www.unsplash.com

51%

of adults in the UAE say that the environmental impact of the food that they buy is more important now
Bord Bia Indicators Barometer, Oct 2020

47%

of adults in the UAE say that reducing packaging and plastics in the food and drink that they buy is more important now
Bord Bia Indicators Barometer, Oct 2020



57%

of adults in the UAE feel the food and drink bought "being sealed and not touched" is more important now
Bord Bia Indicators Barometer, Oct 2020

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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#12 Waste Not...

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

Implications for Irish Food and Beverages:

- Brands 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
- Create events which “nudge” people to behave responsibly

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Photo by Joshua Hoehne on Unsplash

Indicators

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Exploration of the UAE market. October 2020



#13 Chameleon Living.

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

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Photo by cottonbro from Pexels

#13 Chameleon Living

The hidden world of Covid-19 consumption.

There are plenty of headline grabbers around changed consumer behaviour since Covid-19 took a grip on all of our lives. We've seen panic-buying, a baking-bandwagon and new modes of virtual social-media tools take off. But are there consumption behaviours that are hidden in plain sight?

Prior to the Covid-19 crisis, the traditional 9-5 as we used to know it had started to change over the last number of years. The gig economy, more flexible work and remote working all have had an impact on the traditional ways of working. Likewise, the traditional office itself has had a complete makeover with spacious workplaces created and designed to be somewhat more recreational in nature. The blurring of work and leisure time was a very real phenomenon putting more and more pressure on time-strapped consumers.

Now that blurred line between work and play has been pushed into our homes, behind closed doors. The world of work is completely disrupted for us all. Some of us have seen our work disappear. Others struggle with the challenge of working at home and managing home-life. For others, work was our social-network and now that has disappeared either completely or behind a virtual interface. All of us have been forced to adapt to a new environment – the true extent of change may still be hidden.

We call this Indicator **CHAMELEON LIVING**.

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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

56%

of adults in the UAE miss going to work with their colleagues

Bord Bia Indicators Barometer. Oct 2020

BORD BIA Thinking House

#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.

37%

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

Bord Bia Indicators Barometer

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

#13 Chameleon Living

With Covid-19 forcing people to adapt to some cultural norms, it has created an opportunity to get people to think differently about traditional home life in the UAE.

Bringing people together in new ways is creating new opportunities for new narratives and opportunities for cultural change.

With many traditions around Ramadan having to be adapted, it has opened the door for brands to create new forms of engagement.

Betty Crocker dedicated its Ramadan campaign to structural change – encouraging everyone in the family to get baking. This happened after an eight year old called Sultan took to social media asking why instructions on their mixes only addressed women. They subsequently reviewed their wording encouraging everyone to get baking and changed more than 20 million packs whilst also inviting families to showcase everyone baking online.



https://www.stylus.com/ramadan-brand-responses

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#13 Chameleon Living

New ways of work continue to emerge which could present considerations for future work life and create new opportunities for foodservice.

TRAVEL AND TOURISM

Rove Hotels: targets work-from-home segment



Average daily room rate for hotels in the United Arab Emirates was AE750 in 2019, as per Euromonitor International's Travel System.

Image Source: The National

- With restrictions on public movement and 30% limitation on office occupancy, people had to work from home. However, finding dedicated workspace offering a productive environment was a challenge for many working from home. Rove Hotels offered rooms as private offices for the work-from-home segment in Dubai. With all amenities, water and coffee with high-speed internet, guests can also upgrade to packages that include foodservice.

A hotel chain Rove in the UAE is offering people rooms to work. This was an opportunity identified for those finding it difficult to work from home. They provide all amenities required including food.

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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020



#13 Chameleon Living.

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

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Coronavirus
COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020

#14 Delivery Fatigue.

How consumers are opting-in and out of food delivery

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Photo by cottonbro from Pexels

#14 Delivery is still important right now.

Delivery



27%

of adults in the UAE are getting more meal deliveries

Bord Bia Indicators Barometer

Takeaway for collection



24%

decrease in takeaway for collection in UAE since Covid-19

Bord Bia Indicators Barometer

Kai Pilger @ unsplash.com

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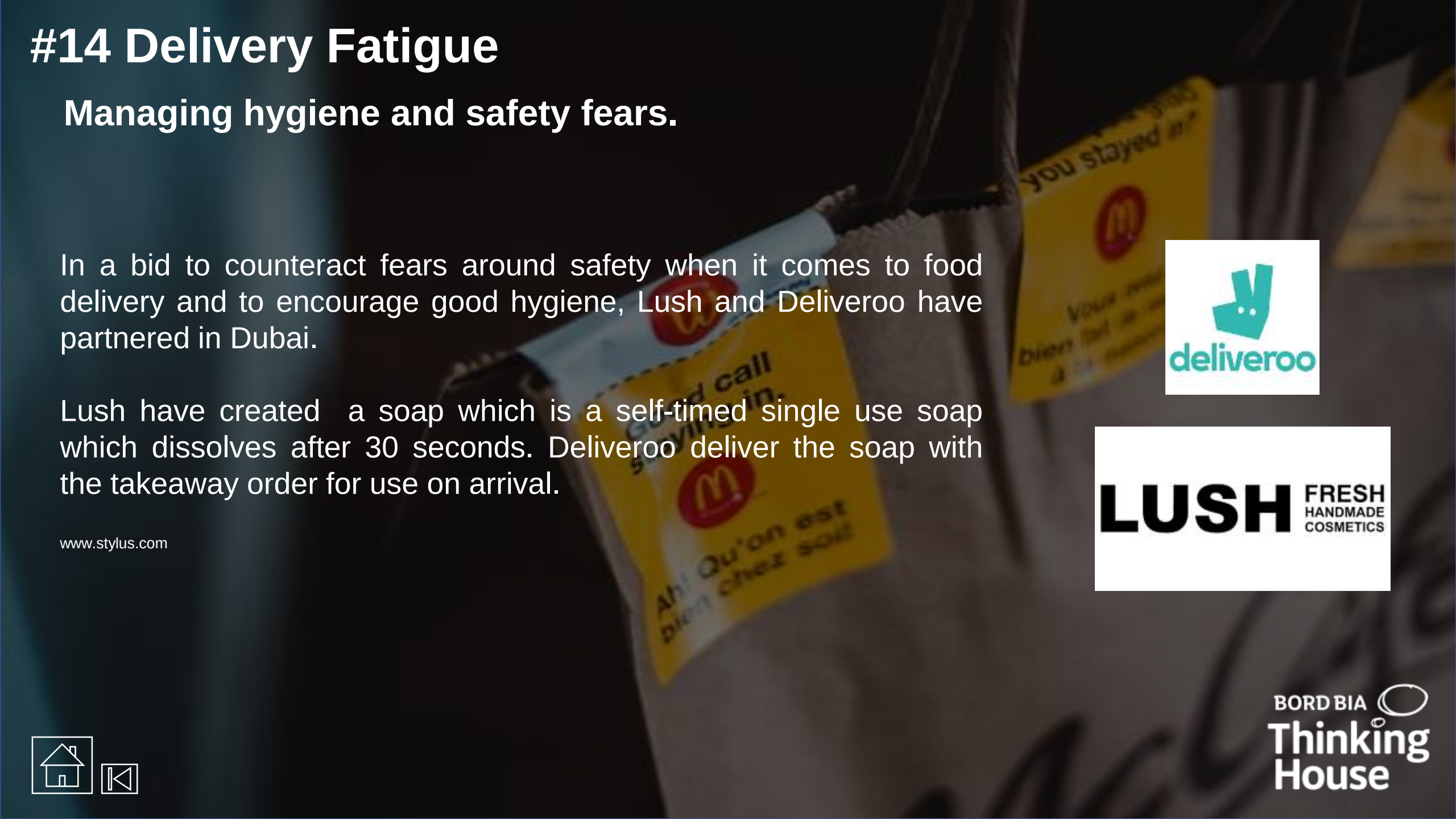
#14 Delivery Fatigue

Managing hygiene and safety fears.

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 for use on arrival.

www.stylus.com



deliveroo

LUSH FRESH HANDMADE COSMETICS

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#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 from scratch more, perhaps meal kits could be part of the solution as busy lives take off once more.

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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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Indicators

Coronavirus COVID-19

From early clues on the post crisis consumer and emerging market realities.
Exploration of the UAE market. October 2020



#14 Delivery Fatigue.

How consumers are opting-in and out of food delivery

Implications for Irish Food and 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
- Creating “hygiene” friendly promotional initiatives to encourage delivery to the home

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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.



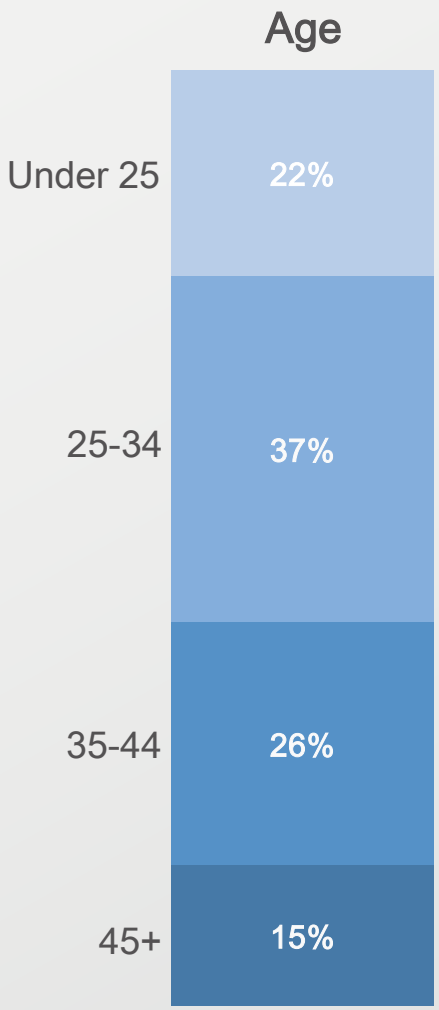
WHO DID WE SPEAK TO?

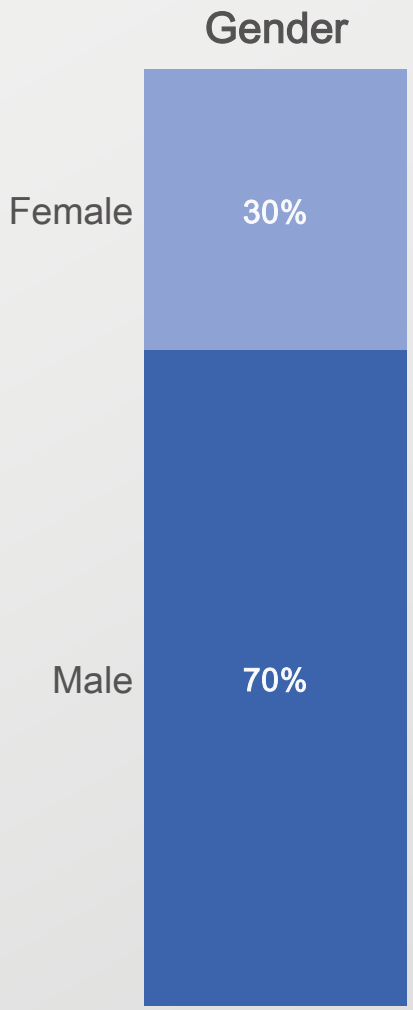
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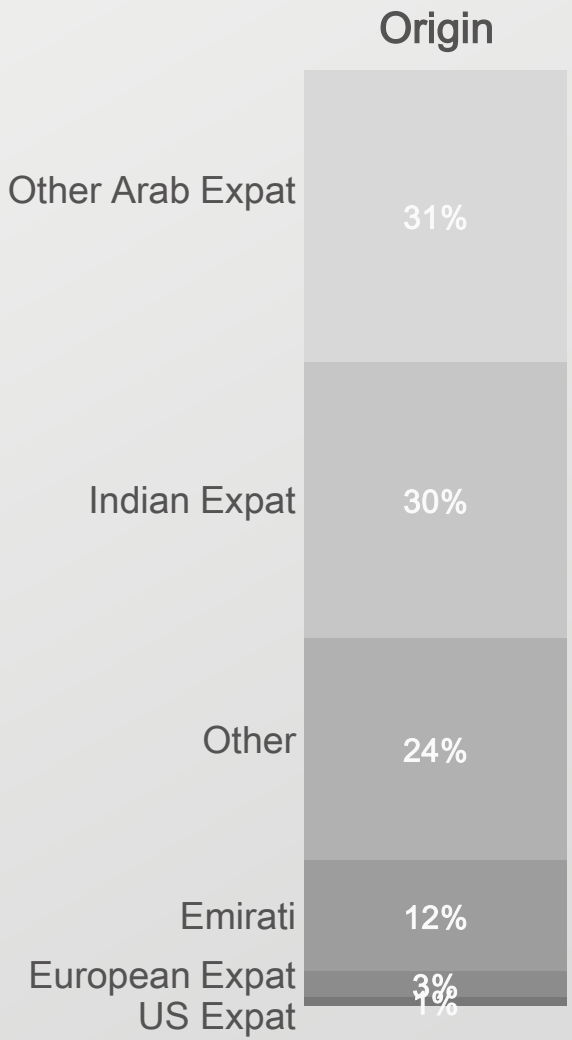
Who we Spoke to?

Coronavirus COVID-19

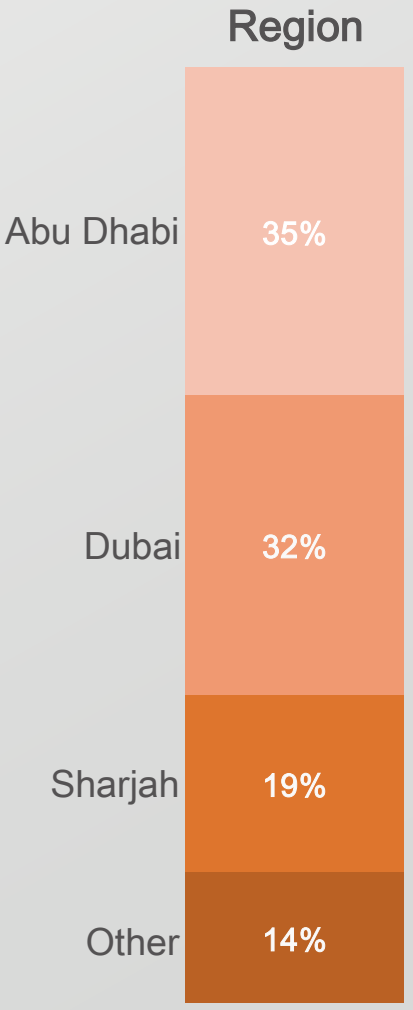
(Base: Adults 18+ in the UAE, n=1,000)









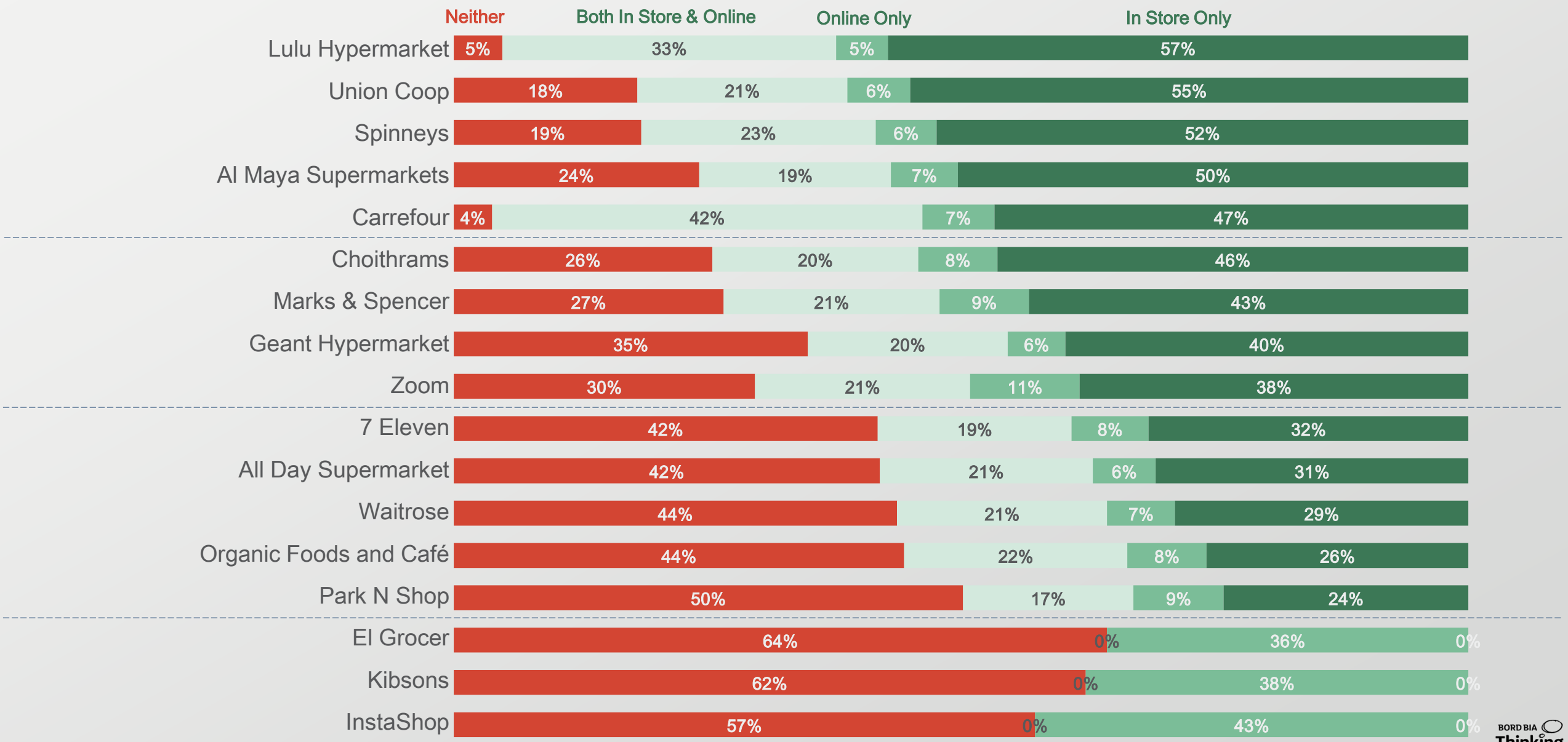


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Store Penetration for Grocery Shopping

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



And in which of these stores do you shop for groceries either online or in store?

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IMPORTANCE & INFLUENCE OF COVID-19

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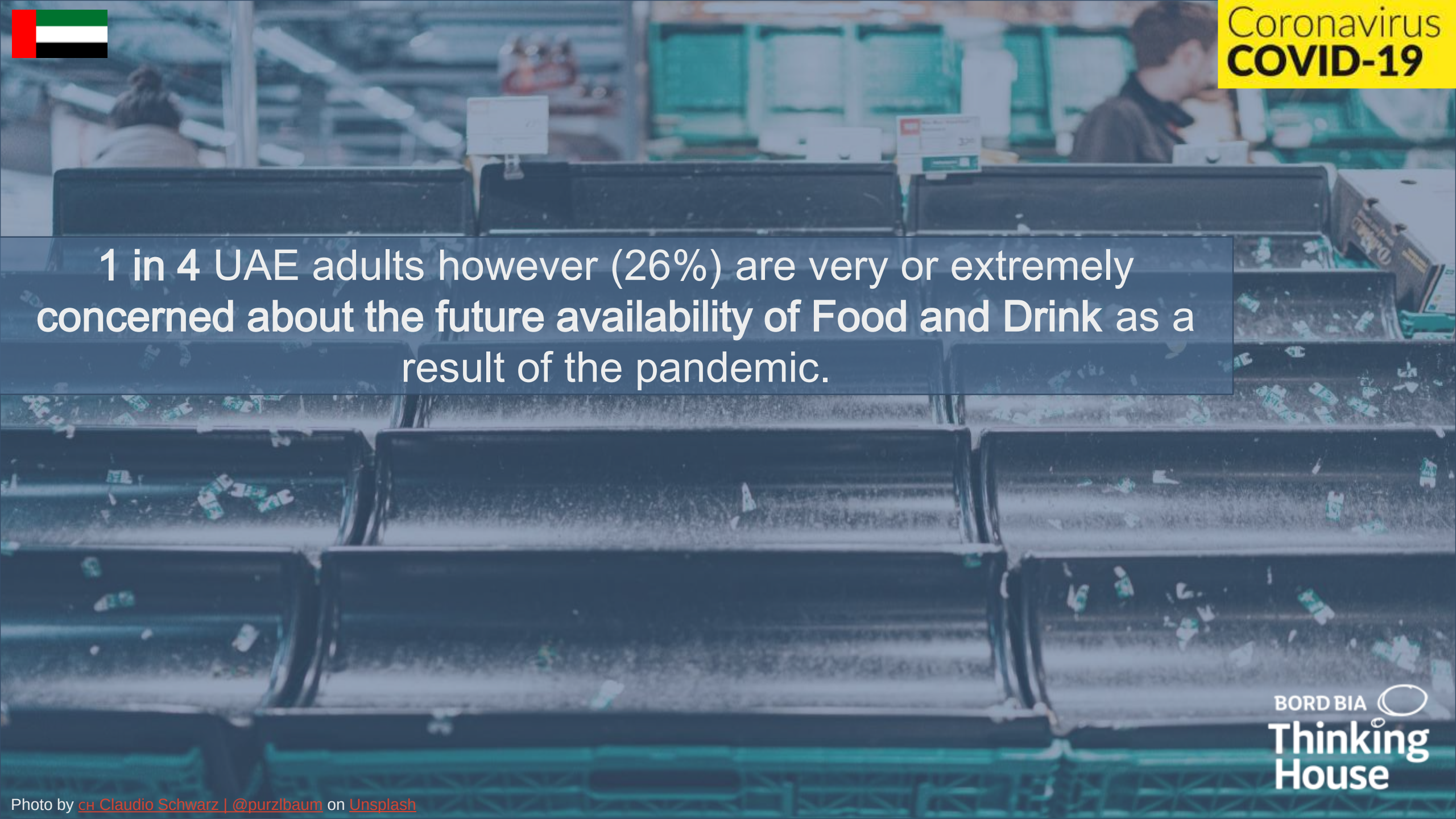


Coronavirus
COVID-19

The **majority of UAE adults** (61%) feel their country is **recovering and getting over Covid-19 successfully**, consistent across all age groups and regions.

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Photo by Kristopher Roller on Unsplash



Coronavirus
COVID-19

1 in 4 UAE adults however (26%) are very or extremely **concerned about the future availability of Food and Drink** as a result of the pandemic.

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Photo by CH Claudio Schwarz | @purzlbaum on Unsplash



Coronavirus
COVID-19

In the event of an increase in case numbers for Covid-19, over **4 in 10** (43%) adults **would do more grocery shopping online** while over **3 in 10** (33%) would **increase their rolling food stockpiles** at home.

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Photo by rupixen.com on Unsplash

Coronavirus
COVID-19

Over **half of adults** are **more conscious around aspects of food safety** as a result of the pandemic

- ***57%*** *feel the food and drink bought being* ***sealed and not touched*** *is more important*
- ***56%*** *feel the* ***food safety standards*** *are more important*
- ***52%*** *feel the* ***traceability*** *of their food and drink is more important*



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Photo by Deon Black on Unsplash

Coronavirus
COVID-19

Environmental aspects around food choice has become more important since the pandemic started

- ***59%*** *feel* ***reducing food waste*** *is more important*
- ***51%*** *feel the* ***environmental impact of the food and drink you buy*** *are more important*
- ***47%*** *feel* ***reducing packaging and plastics in the food and drink you buy*** *is more important*



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Photo by Brian Yurasits on Unsplash



Coronavirus
COVID-19

Half of adults feel the **nutritional content** and the **naturalness** of their food & drink **is more important now** as a result of the pandemic.

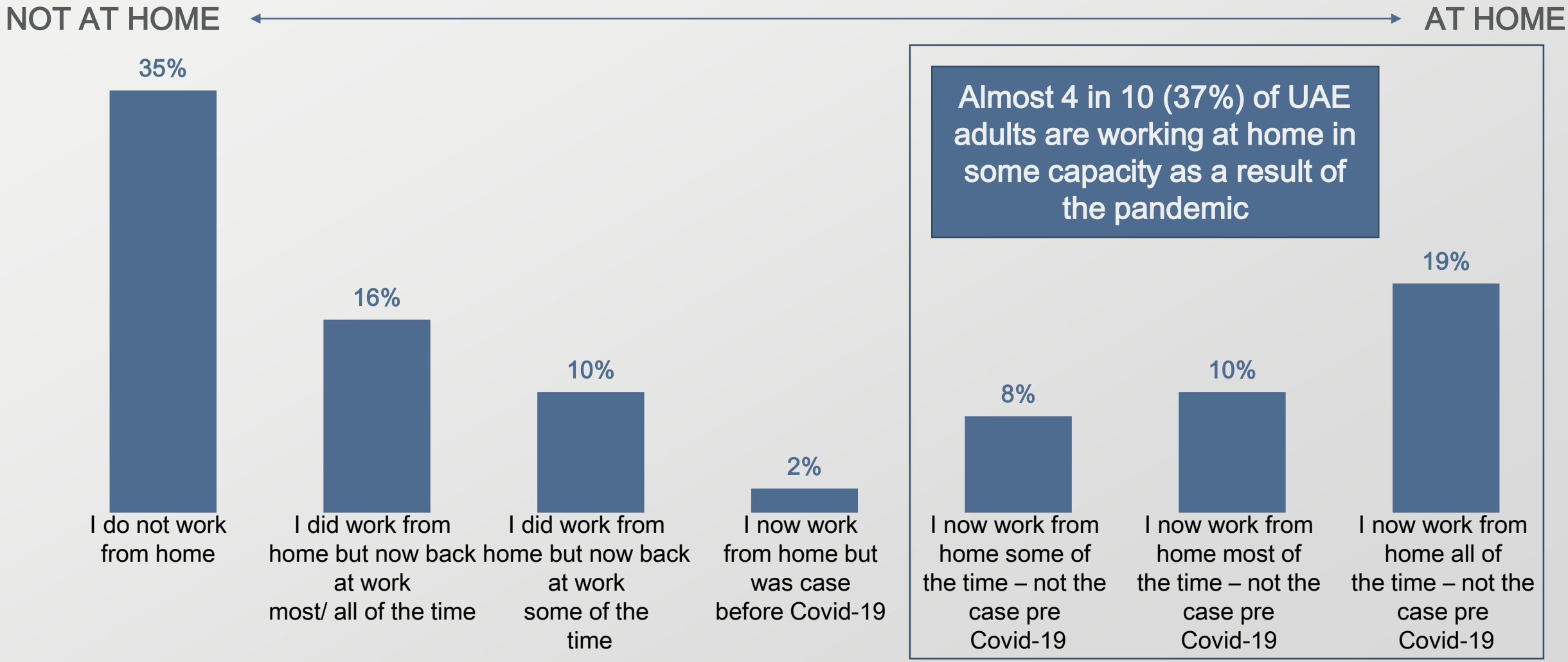
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Photo by Magalie De Preux on Unsplash

Changing Work Dynamics as a result of Covid-19

Coronavirus COVID-19

(Base: Adults 18+ working in the UAE, n=1,000)



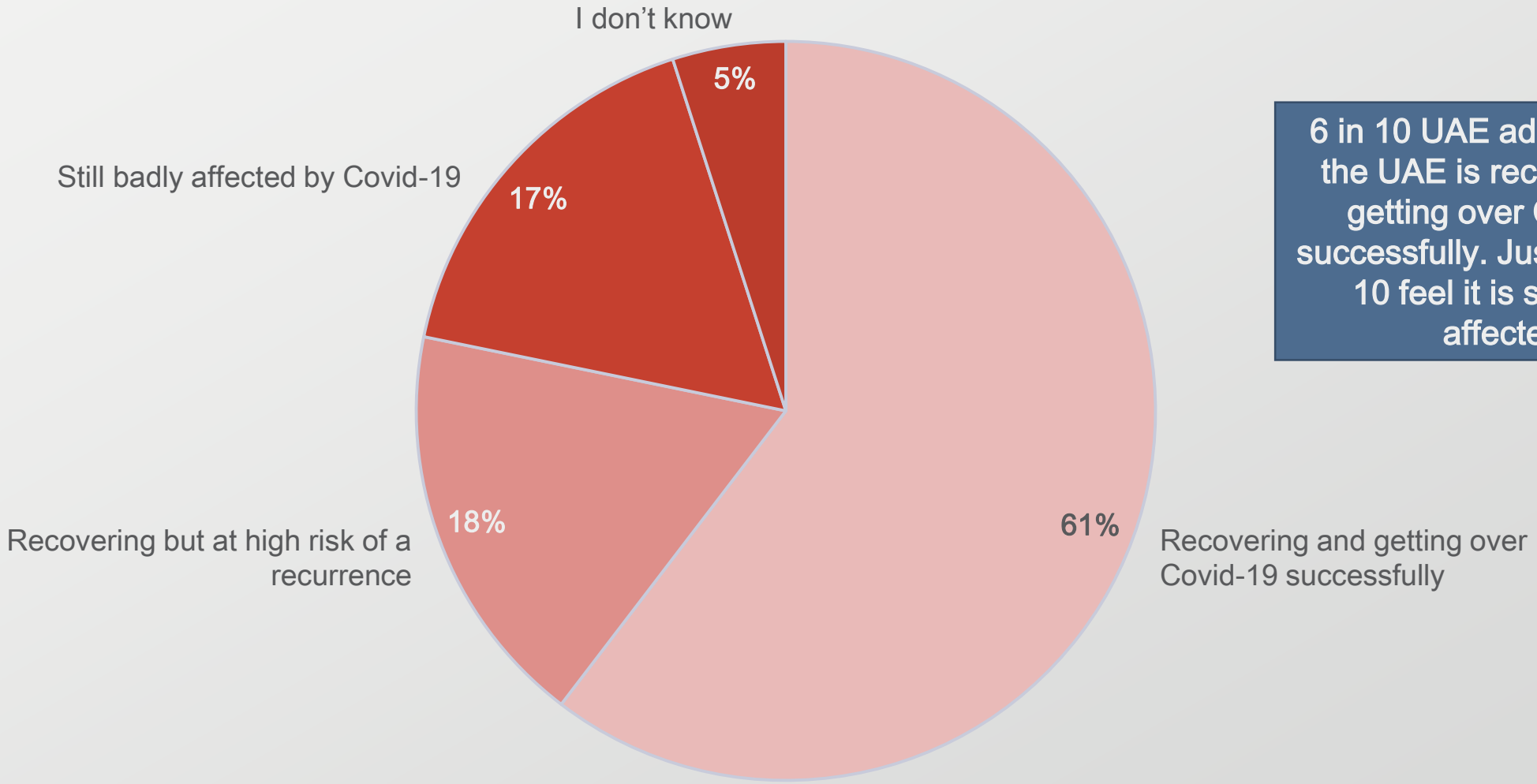
Which of the following best describes your current situation with employment as a result of the Covid-19 situation?

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Public Perception about UAE and the Pandemic

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)



6 in 10 UAE adults believe the UAE is recovering an getting over Covid-19 successfully. Just under 2 in 10 feel it is still badly affected.

Thinking about the Covid-19 pandemic, do you think the UAE is…

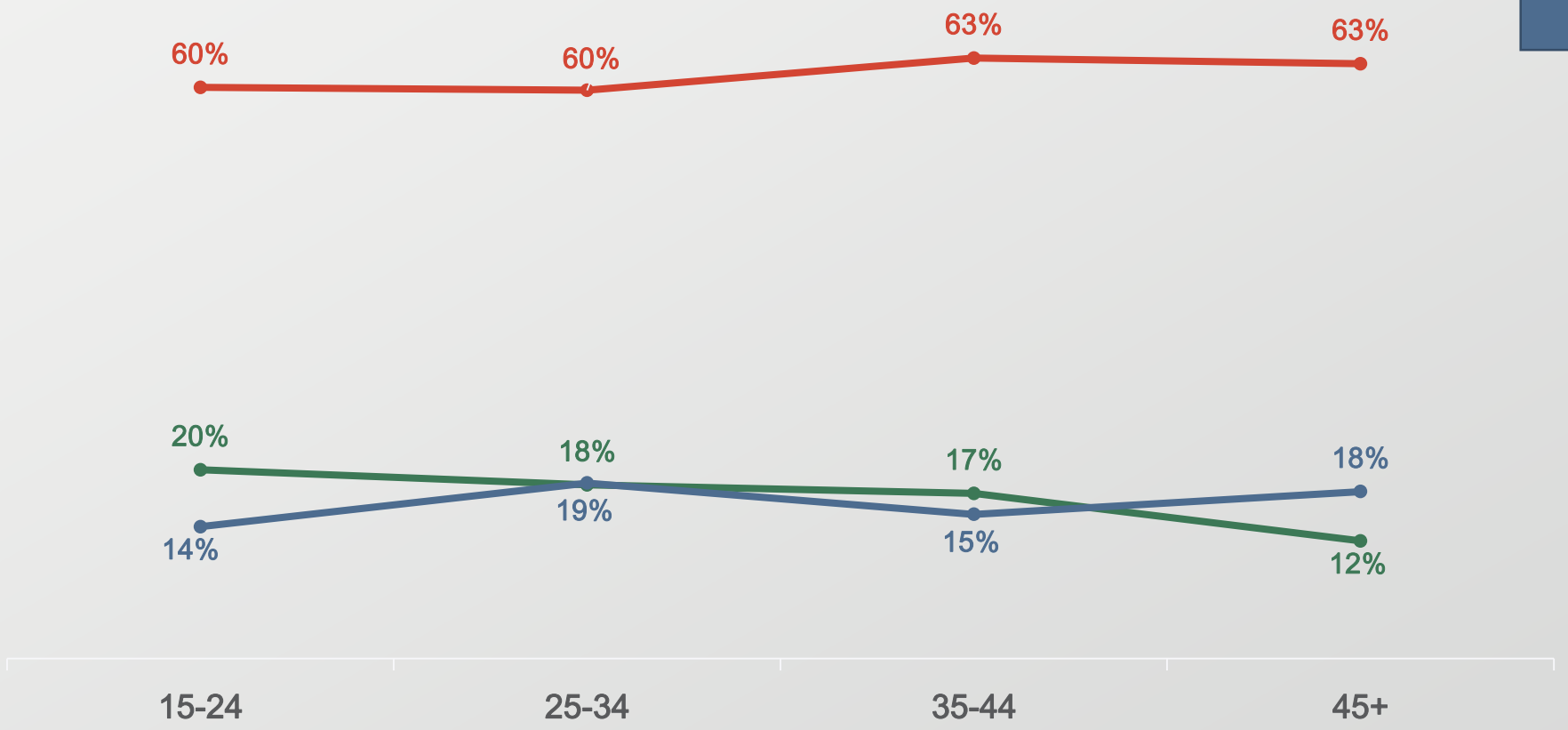
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Public Perception – by Age Group?

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)

The positivity in terms of UAE recovering and getting over Covid-19 successfully is evident across all age groups



Thinking about the Covid-19 pandemic, do you think the UAE is…

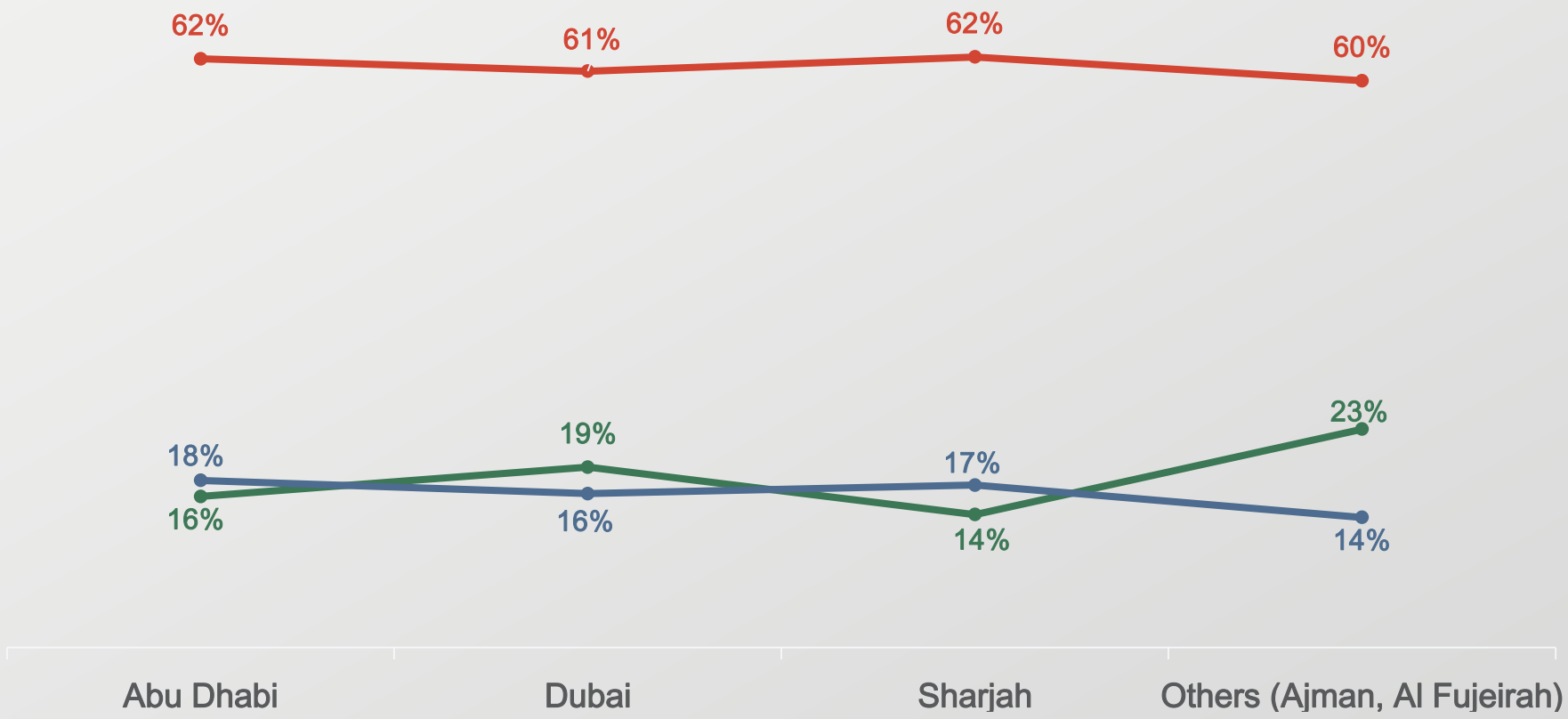
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Public Perception – by Region?

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)

This is also the case across regions in UAE.



Thinking about the Covid-19 pandemic, do you think the UAE is…

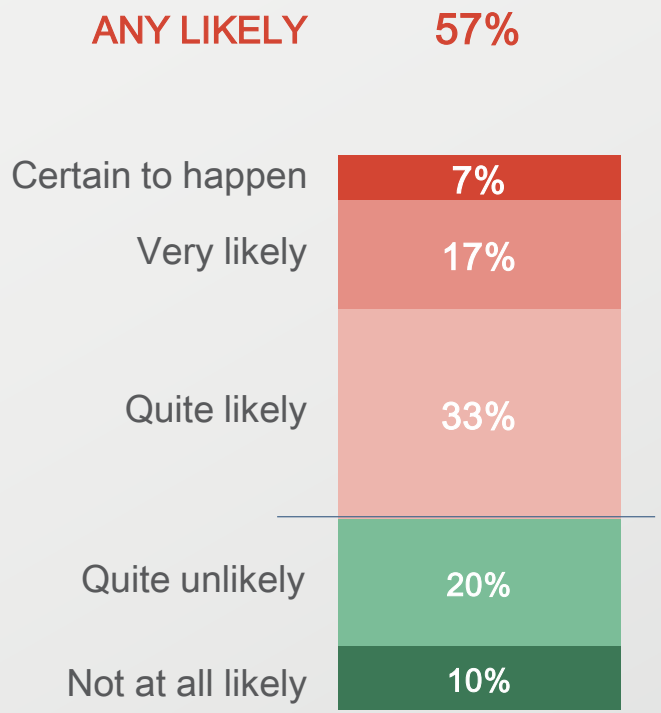
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Perceived likelihood for significant increase in cases?

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)





Don't know *13%*

	ANY LIKELY
15-24	63%
25-34	58%
35-44	54%
45+	50%
Abu Dhabi	55%
Dubai	60%
Sharjah	53%
Others (Ajman, Al Fujeirah)	59%

While almost 6 in 10 feel a significant increase in daily cases is likely, few feel it is certain to happen. Its more of a concern among the younger population in UAE.

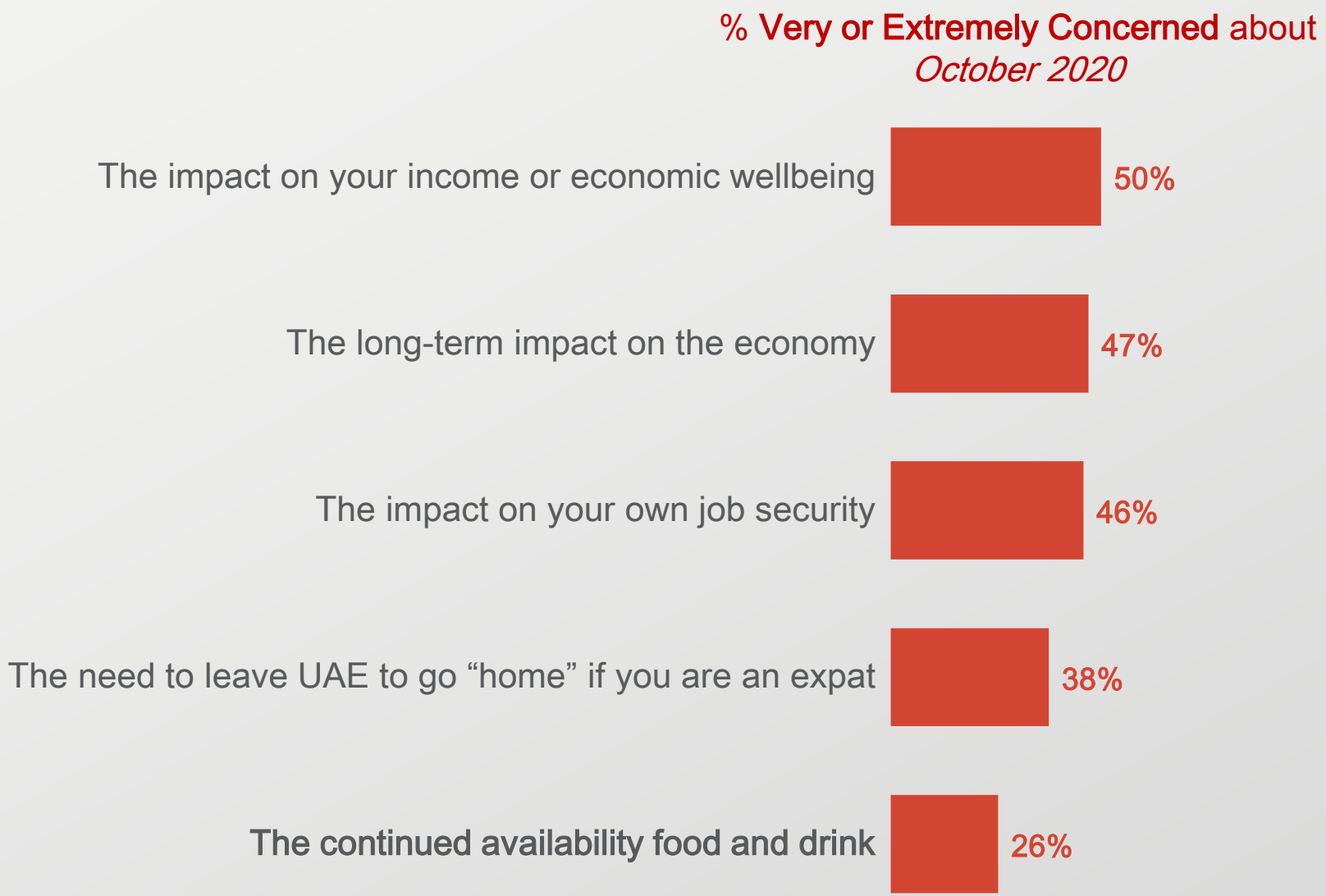
How likely is it that there will be significant increase in the daily cases of Covid-19 in UAE in your opinion?

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Level of Concern for Various Aspects

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)



While overall concern levels tend to be lower than other key markets, impact on income, economy and job security are of greatest concern – while 1 in 4 are however very concerned over the continued availability of food and drink

Aside from the impact on individual's health, to what extent are you concerned by each of the following effects of the Coronavirus (Covid-19), if at all?

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Current Adherence to Specific Guidelines

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)



UAE adults are adhering well to the various guidelines with almost 2 in 3 wearing gloves when grocery shopping.

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

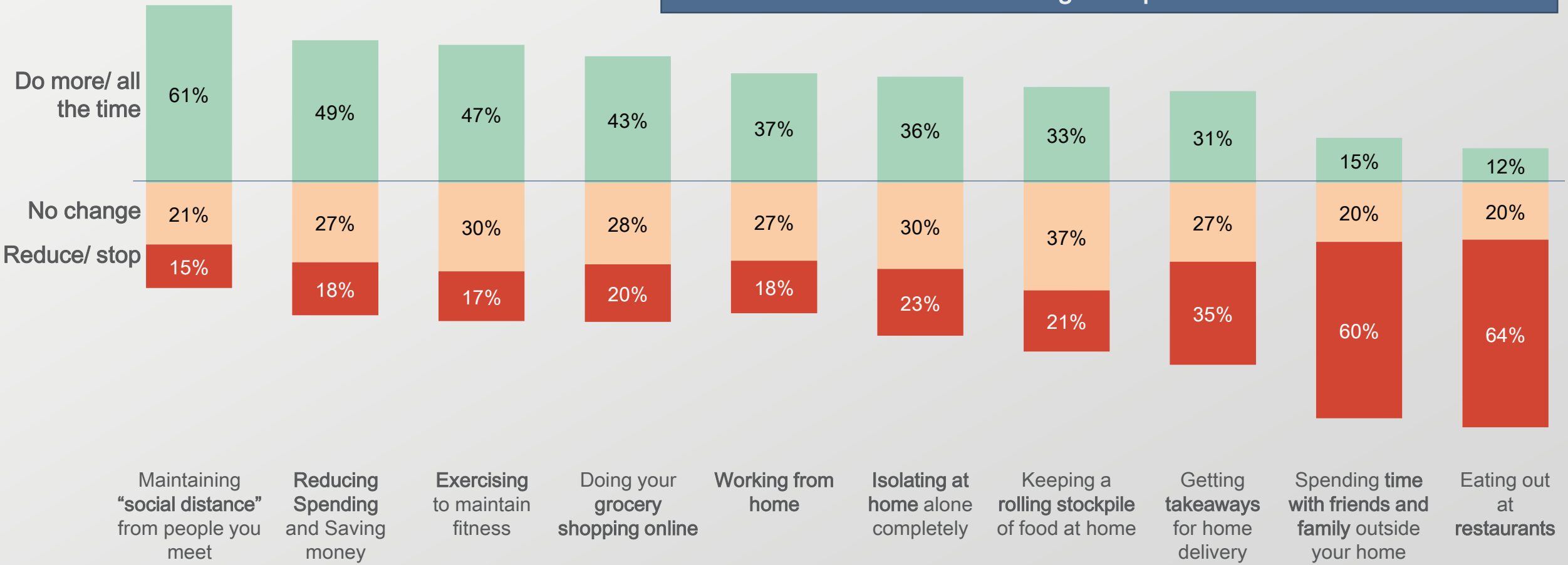
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Expected Behaviour Change with increased Cases

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)

With potential increased numbers of cases, over 4 in 10 claim they would do more grocery shopping online and over 3 in 10 feeling they would increase their rolling stockpile of food at home.



If the increase in case numbers of COVID-19 continued, how would you expect your behaviours to change in these areas, if at all?

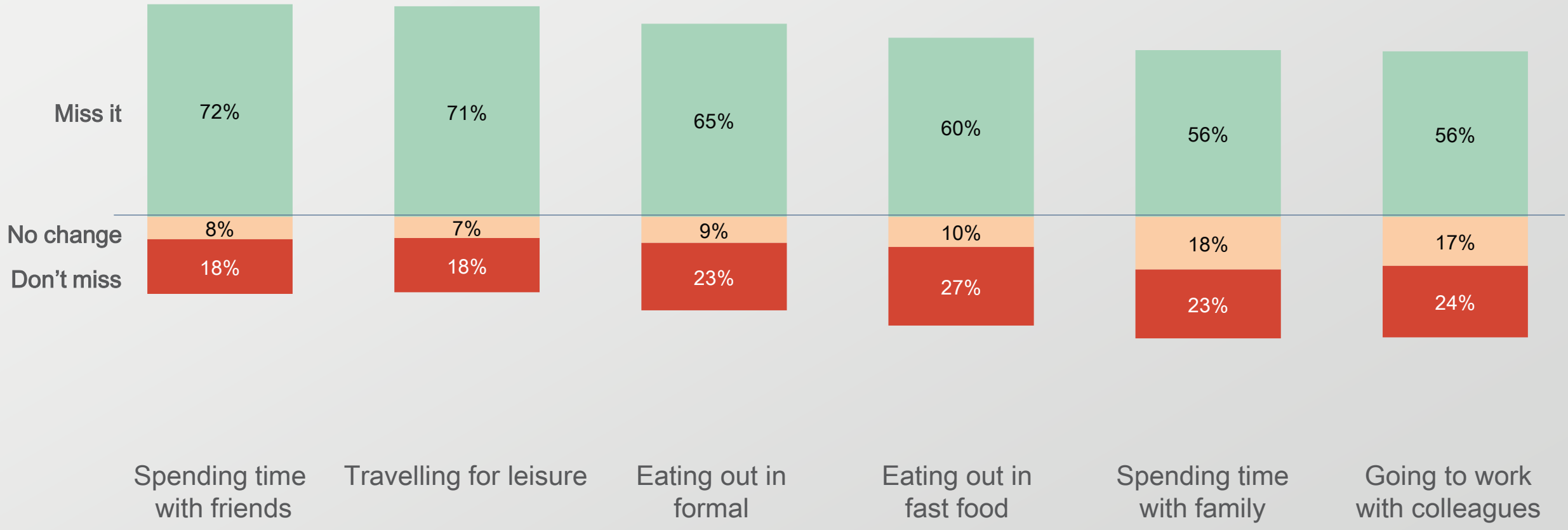
BORD BIA Thinking House

Aspects that are Missed

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)

Over 6 in 10 adults in UAE miss eating out at formal restaurants and fast food restaurants.



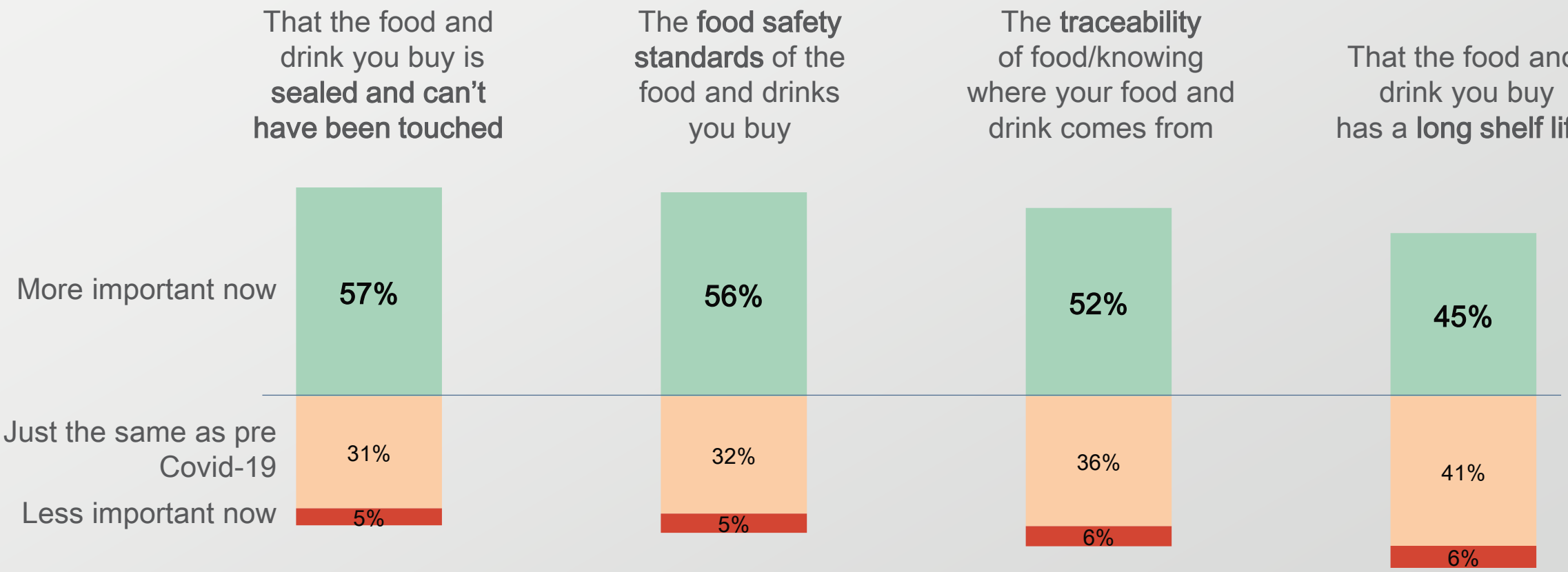
To what extent do you miss each of the following that have been impacted by Covid-19.

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Changing Priorities – *Safety Focus*

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



Clearly the pandemic has put a much greater emphasis on food safety aspects (sealed produce and standards) as well as traceability. Almost half feel longer shelf life of food is more important now.

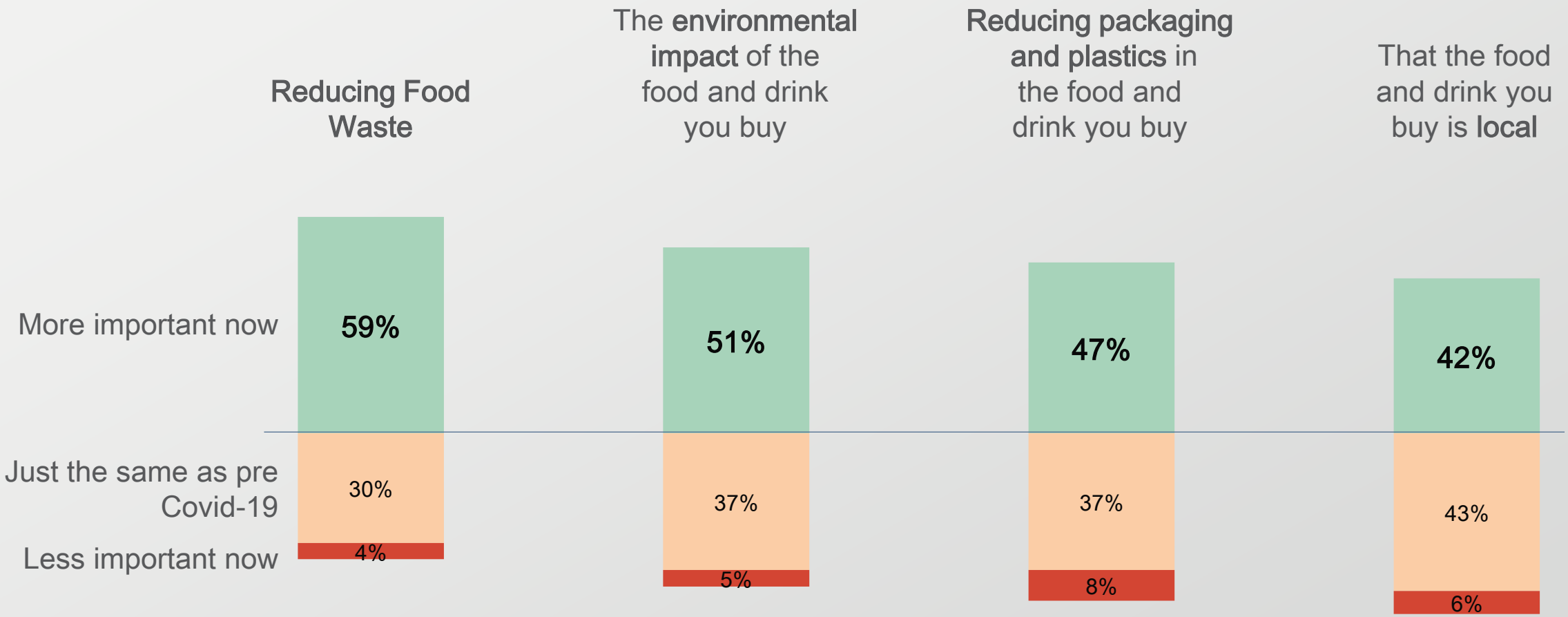
For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.

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Changing Priorities – *Environmental Focus*

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



Greater emphasis on aspects of environmental focus has also resonated as a result of the pandemic – in particular around reducing food waste.

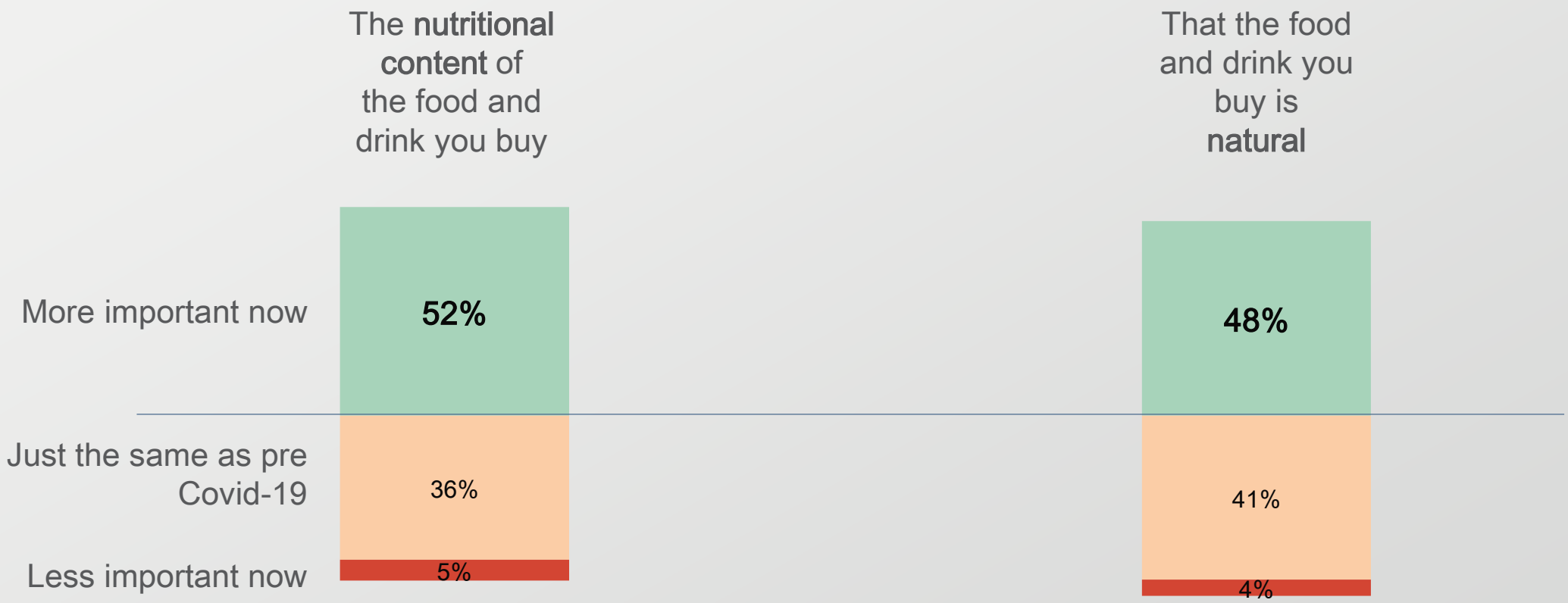
For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.

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Changing Priorities – *Nutrition Focus*

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



Nutritional and natural credentials of food and drink now deemed more important now as a result of the pandemic by half of adults in UAE.

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.

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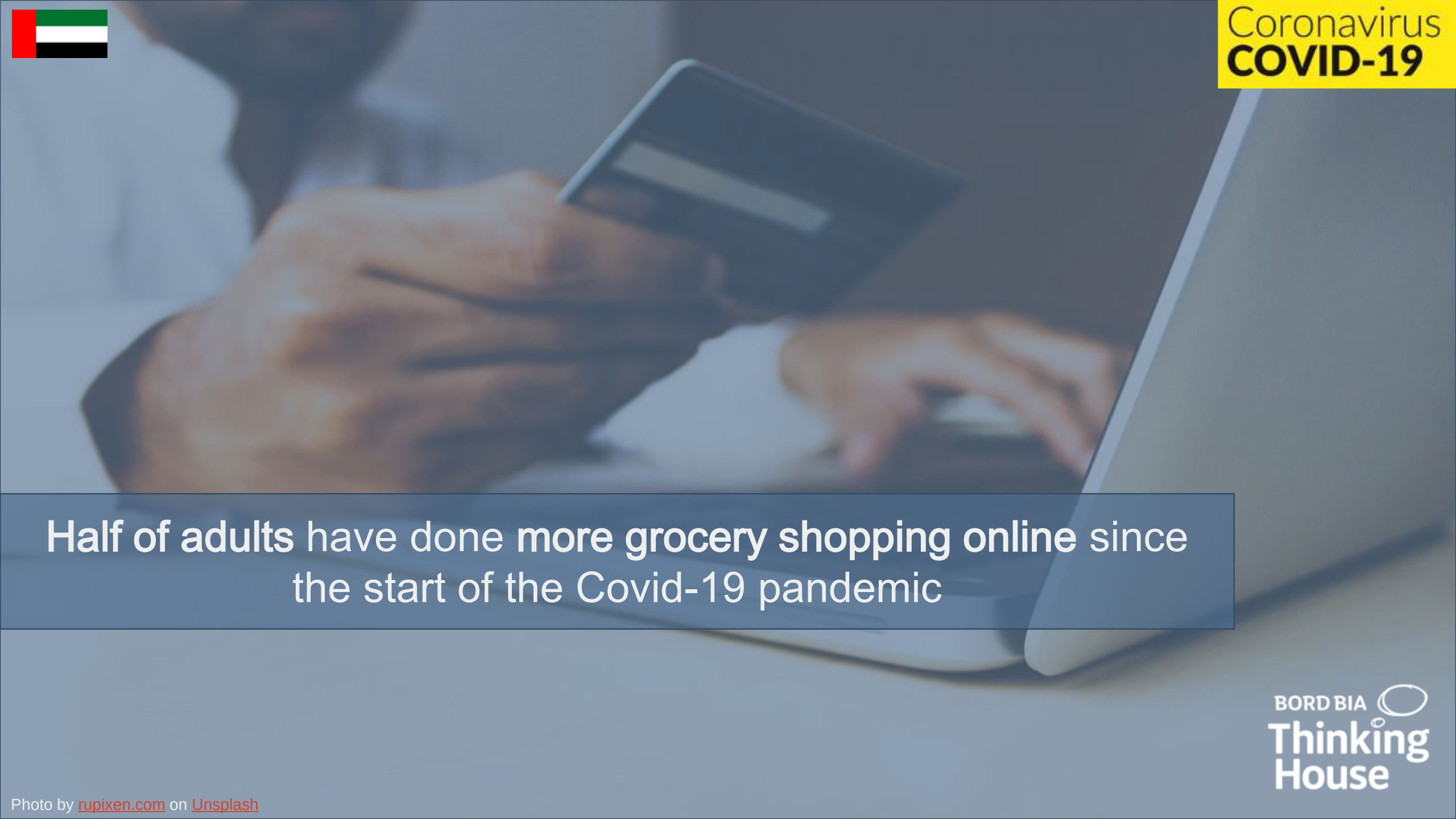


Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

Money & Shopping

BORD BIA
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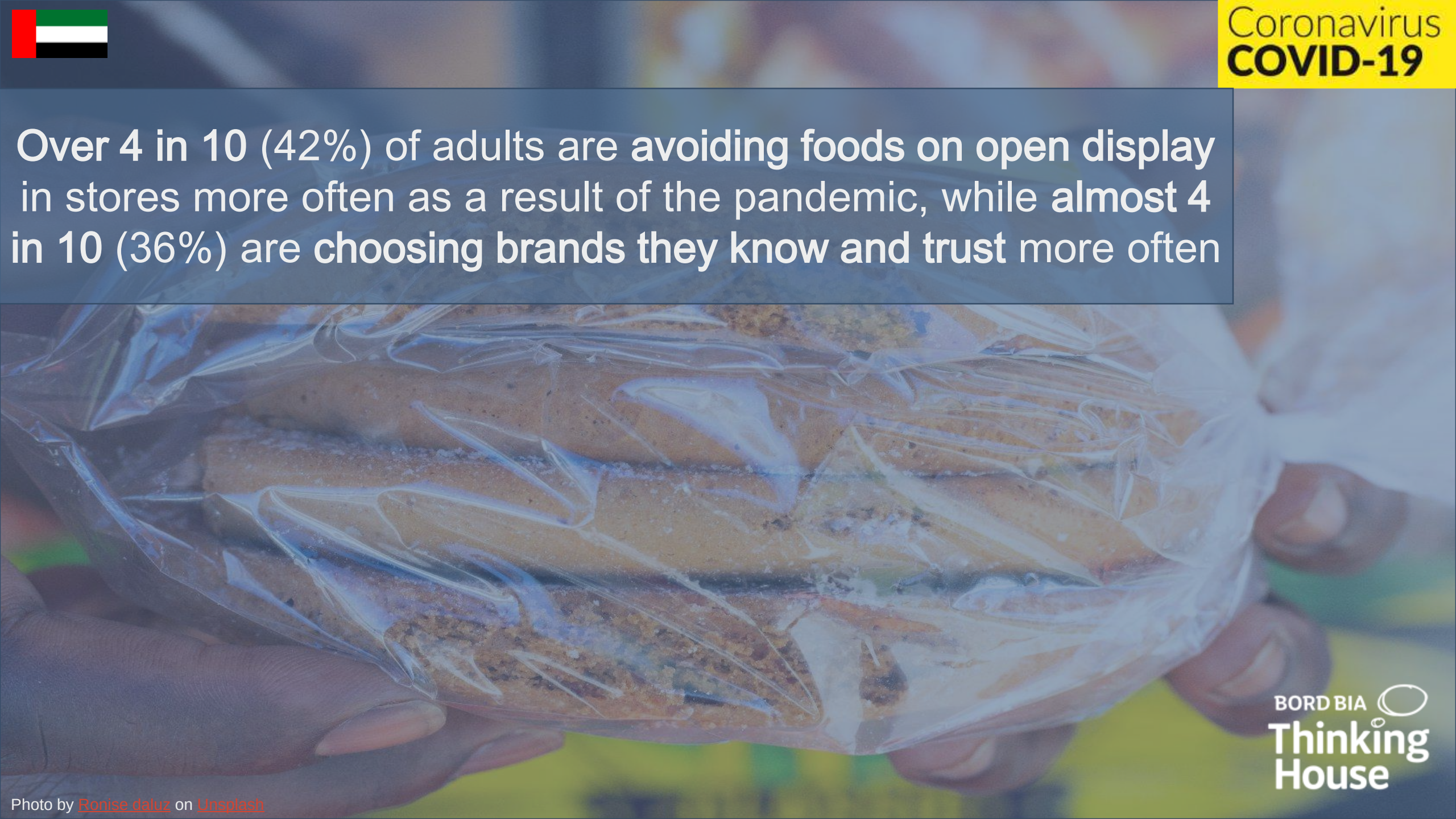


Coronavirus
COVID-19

Half of adults have done **more grocery shopping online** since the start of the Covid-19 pandemic

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Photo by rupixen.com on Unsplash



Coronavirus
COVID-19

Over 4 in 10 (42%) of adults are **avoiding foods on open display** in stores more often as a result of the pandemic, while **almost 4 in 10** (36%) are **choosing brands they know and trust** more often

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Photo by Ronise daluz on Unsplash

Money & Shopping – Behaviour Based

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



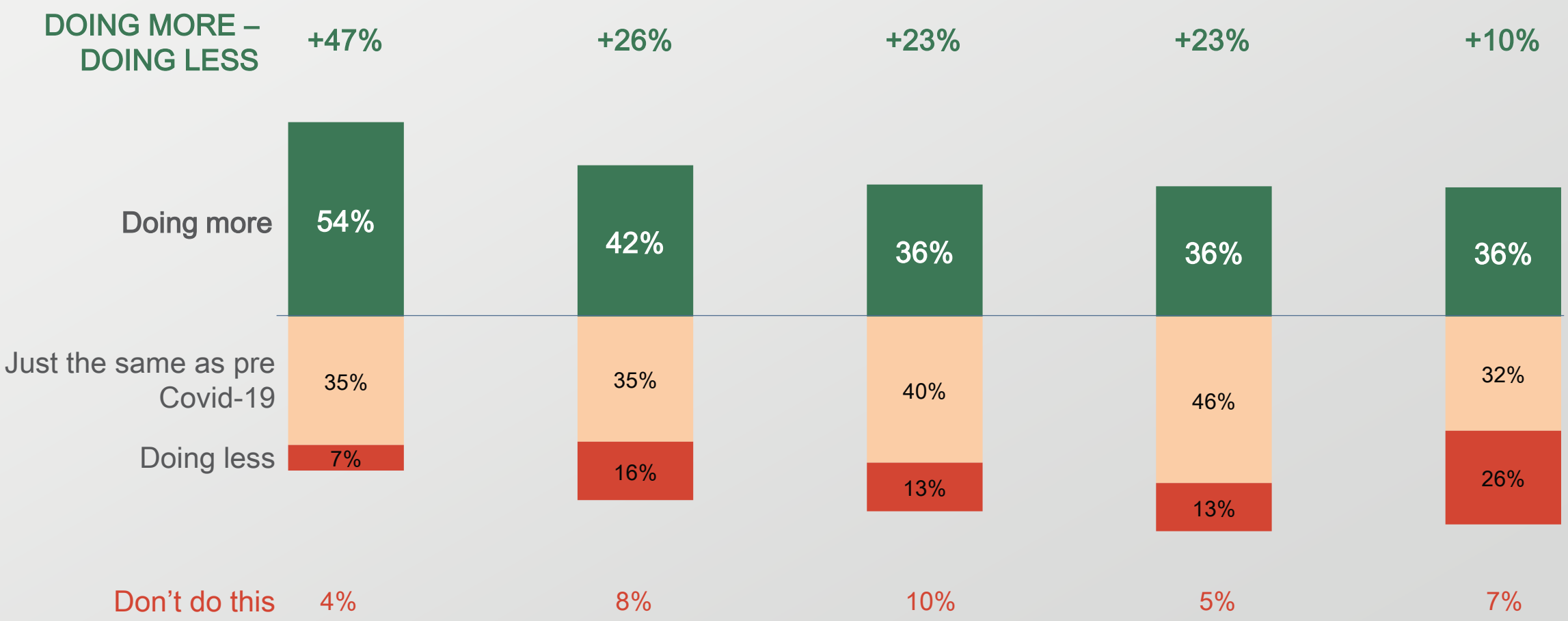
Choose the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Money & Shopping – Caution Based

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



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

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Money & Shopping – Change since Covid-19

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19

Based on % DOING MORE - % DOING LESS



Many behaviours are being adopted more often as a result of the pandemic particularly around contactless payments and shopping online. More cautious behaviours to shopping also growing in penetration around avoiding open display foods and choosing trusted brands.

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Money & Shopping – Change since Covid-19

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19

Based on % DOING MORE - % DOING LESS



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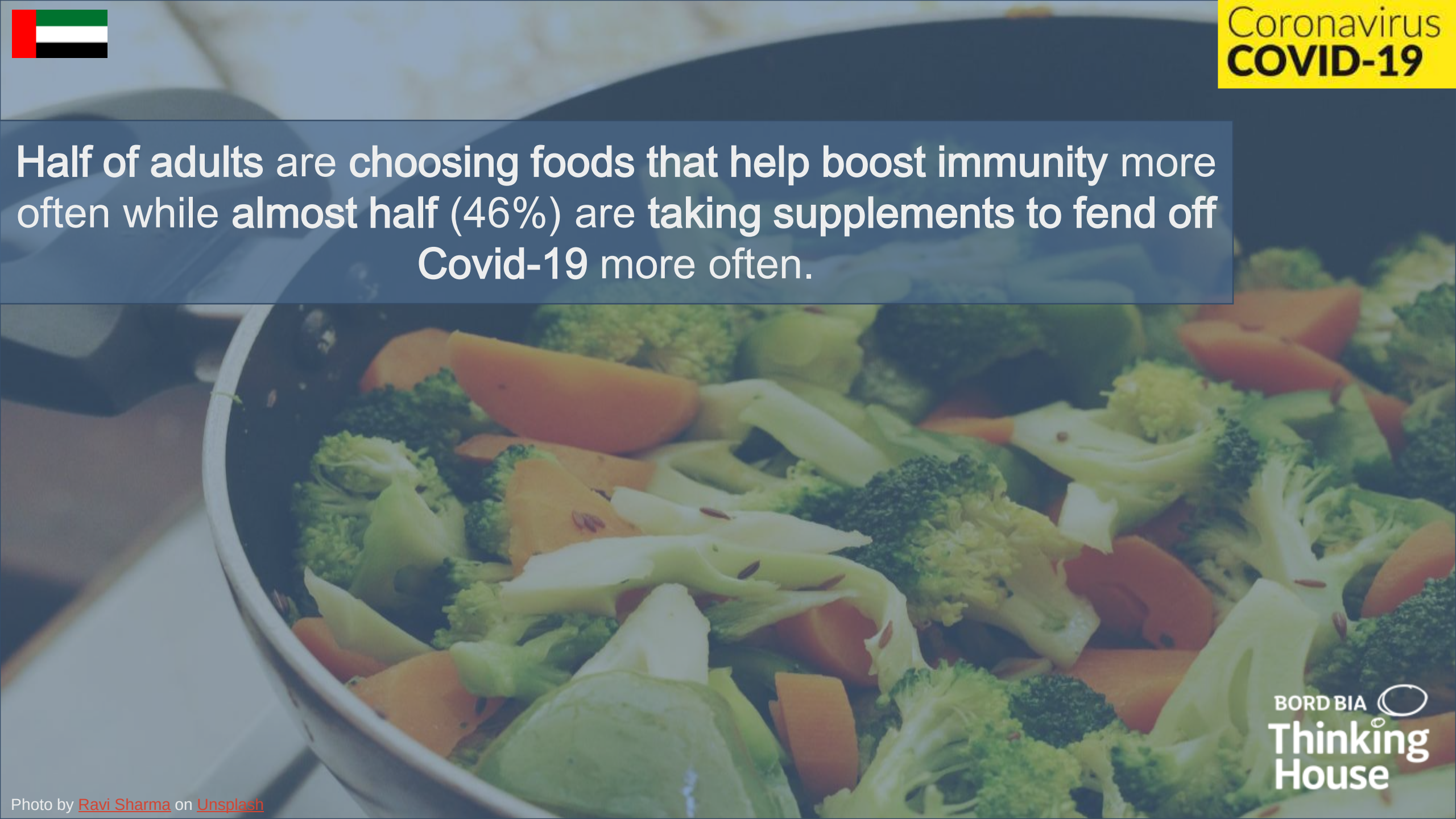


Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

Family Life, Health & Wellness

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Coronavirus
COVID-19

Half of adults are **choosing foods that help boost immunity** more often while **almost half** (46%) are **taking supplements to fend off Covid-19** more often.

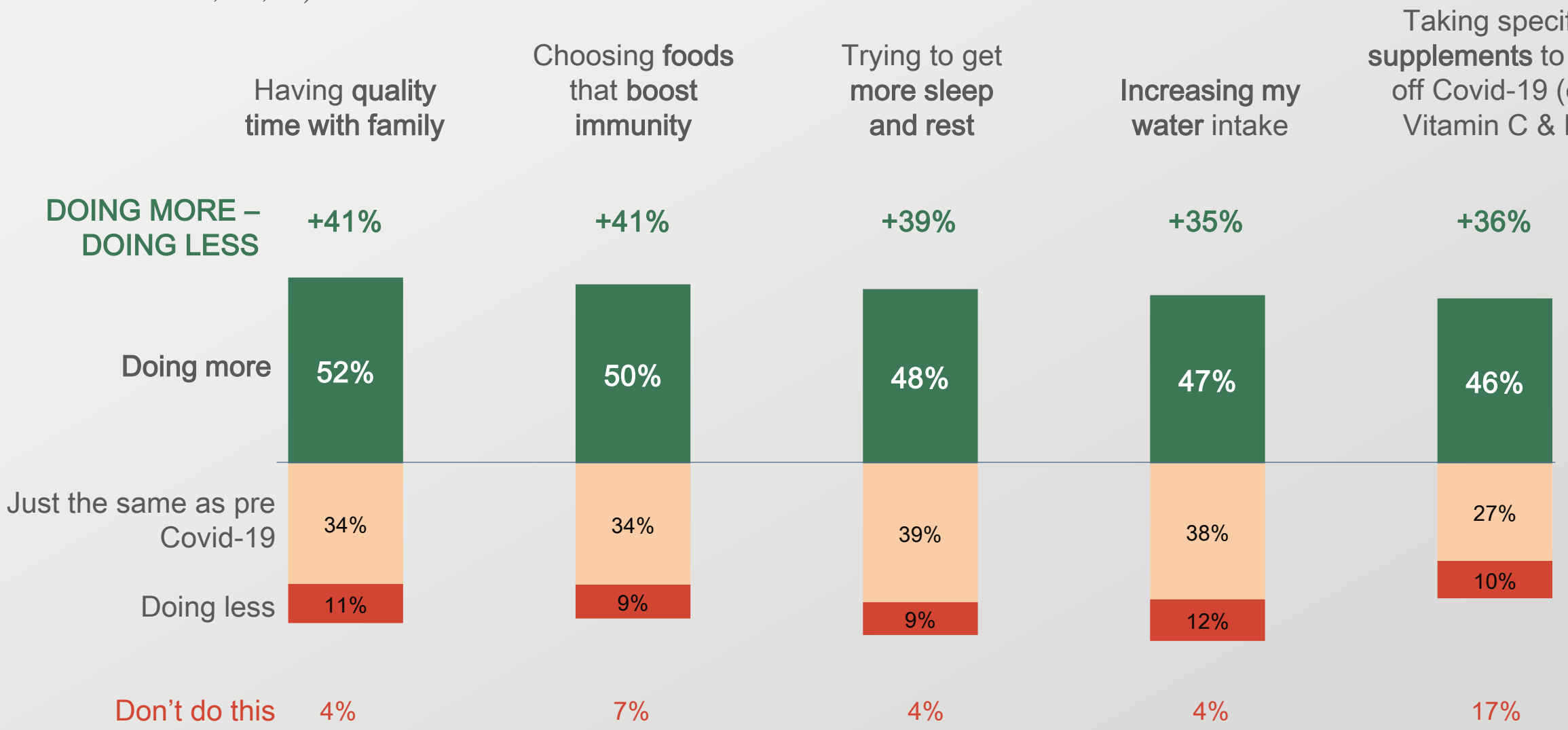
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Photo by Ravi Sharma on Unsplash

Family Life/ Health & Wellness – Health Based

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)



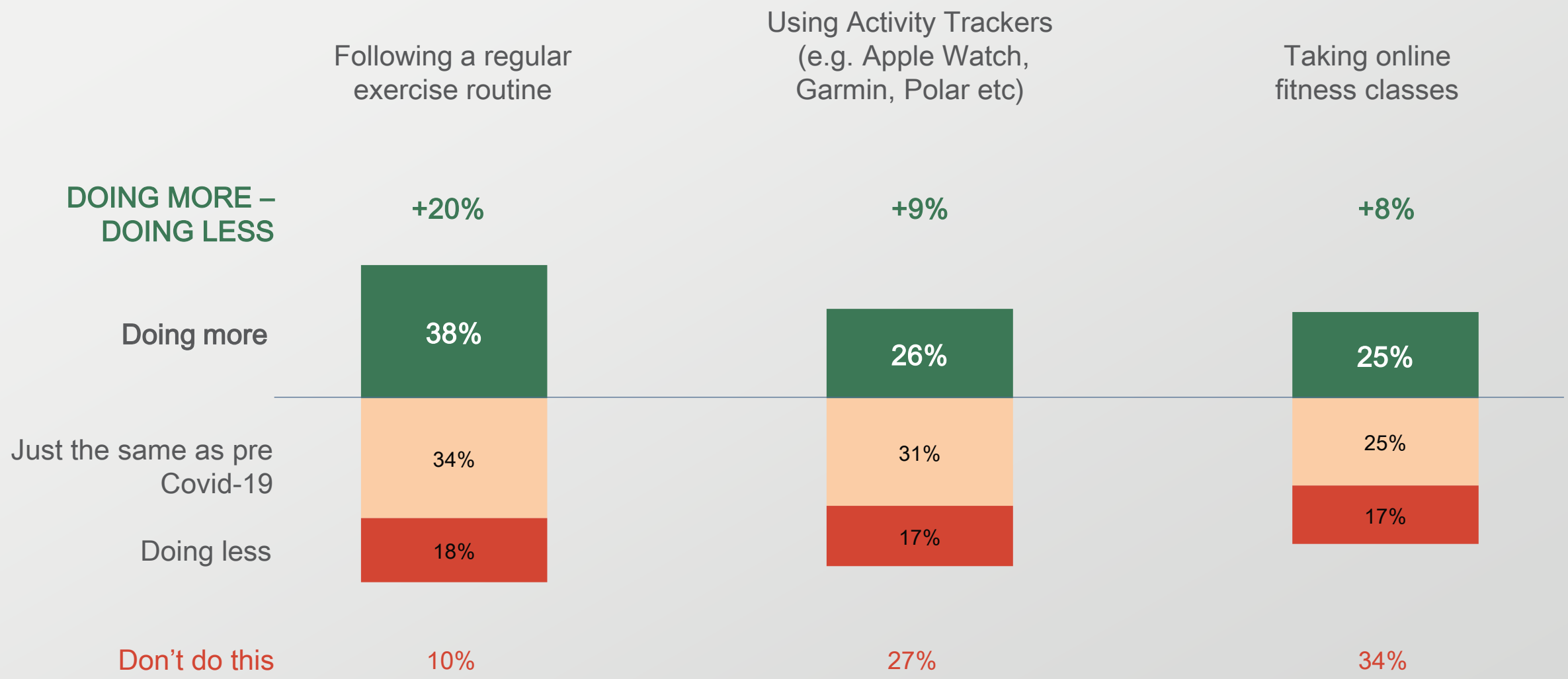
Choose the option that best describes your experience of these as a result of the Coronavirus (Covid-19) response?

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Family Life/ Health & Wellness – Activity Based

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



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

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Family Life/ Health & Wellness – Change since Covid-19

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)

Based on % DOING MORE - % DOING LESS



Many health and wellness behaviours have increased in UAE as a result of the pandemic – notably around immune boosting food choice and supplement usage to fend off Covid.

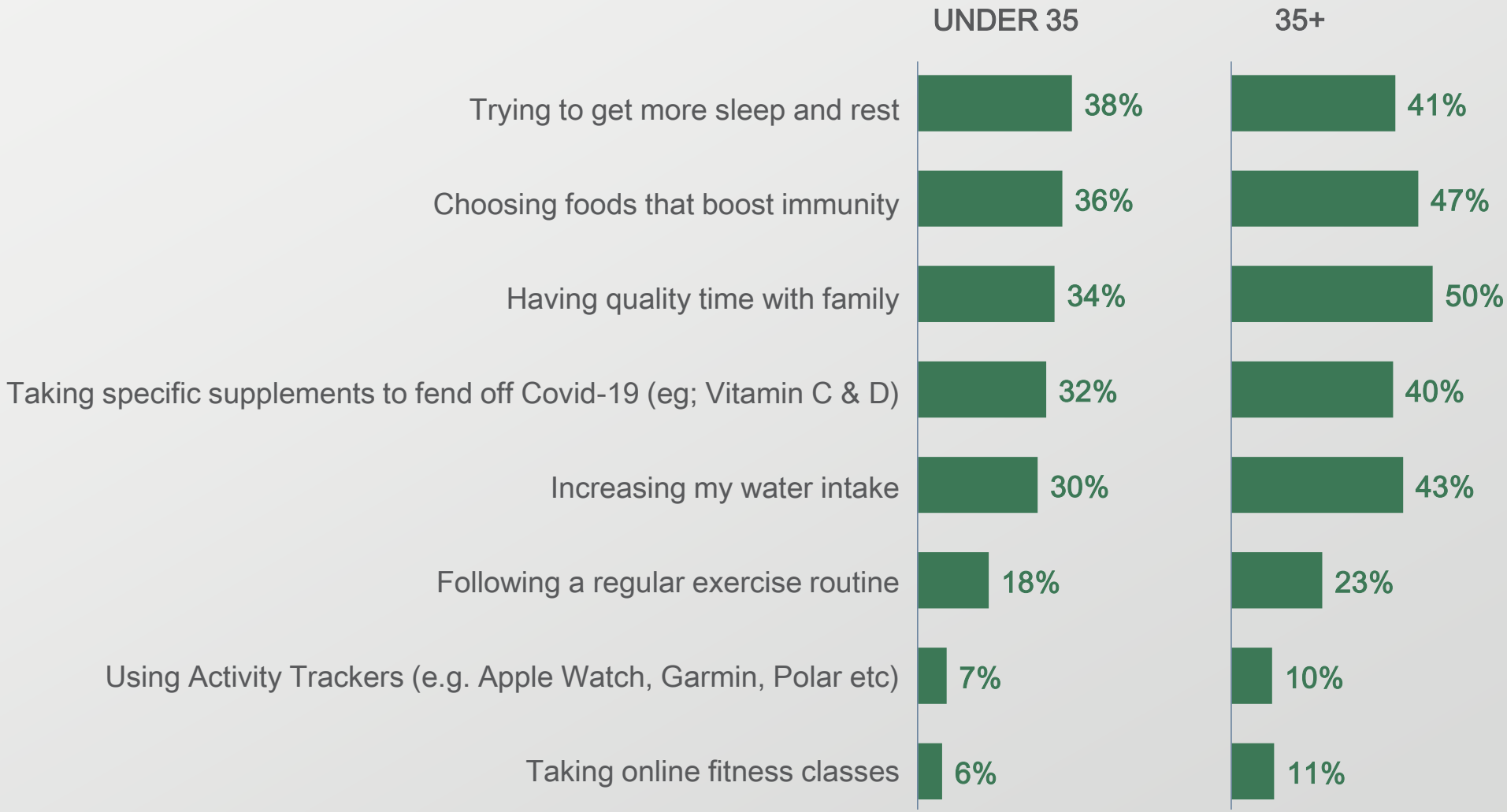
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Family Life/ Health & Wellness – Change since Covid-19

Coronavirus COVID-19

(Base: Adults 18+ in the UAE, n=1,000)

Based on % DOING MORE - % DOING LESS



Health & Wellness behaviour adoption more prevalent among 35+ adults as opposed to under 35's – especially immune boosting goods, supplement usage and water intake.

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UNDERSTANDING BEHAVIOUR CHANGES

Food & Drink

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Coronavirus
COVID-19

4 in 10 adults are **buying better quality foods** in general as a result of the pandemic

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Photo by Obi Onyeador on Unsplash



Coronavirus
COVID-19

1 in 3 adults are **scratch cooking** and **learning to cook using recipes more often** as a result of the pandemic

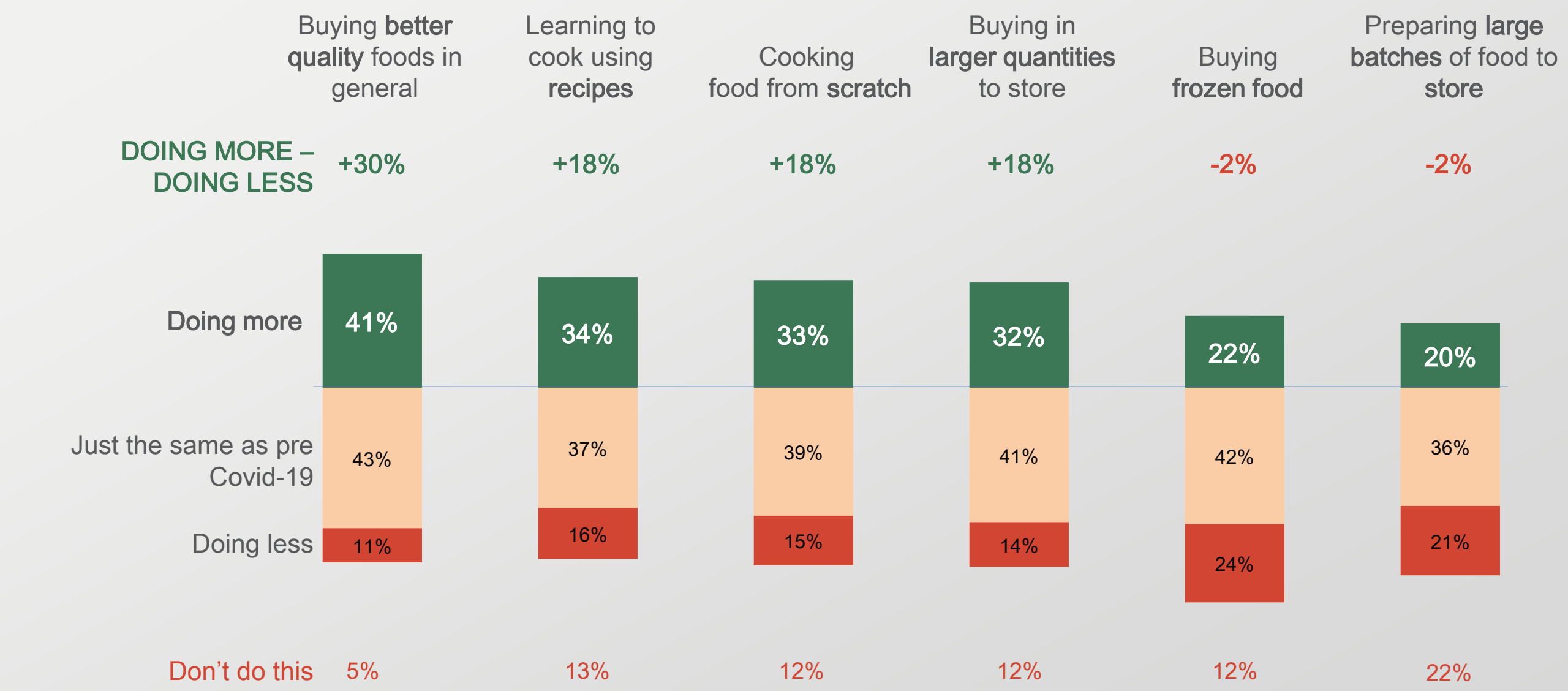
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Photo by Alyson McPhee on Unsplash

Food & Drink – Behaviour Based

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



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

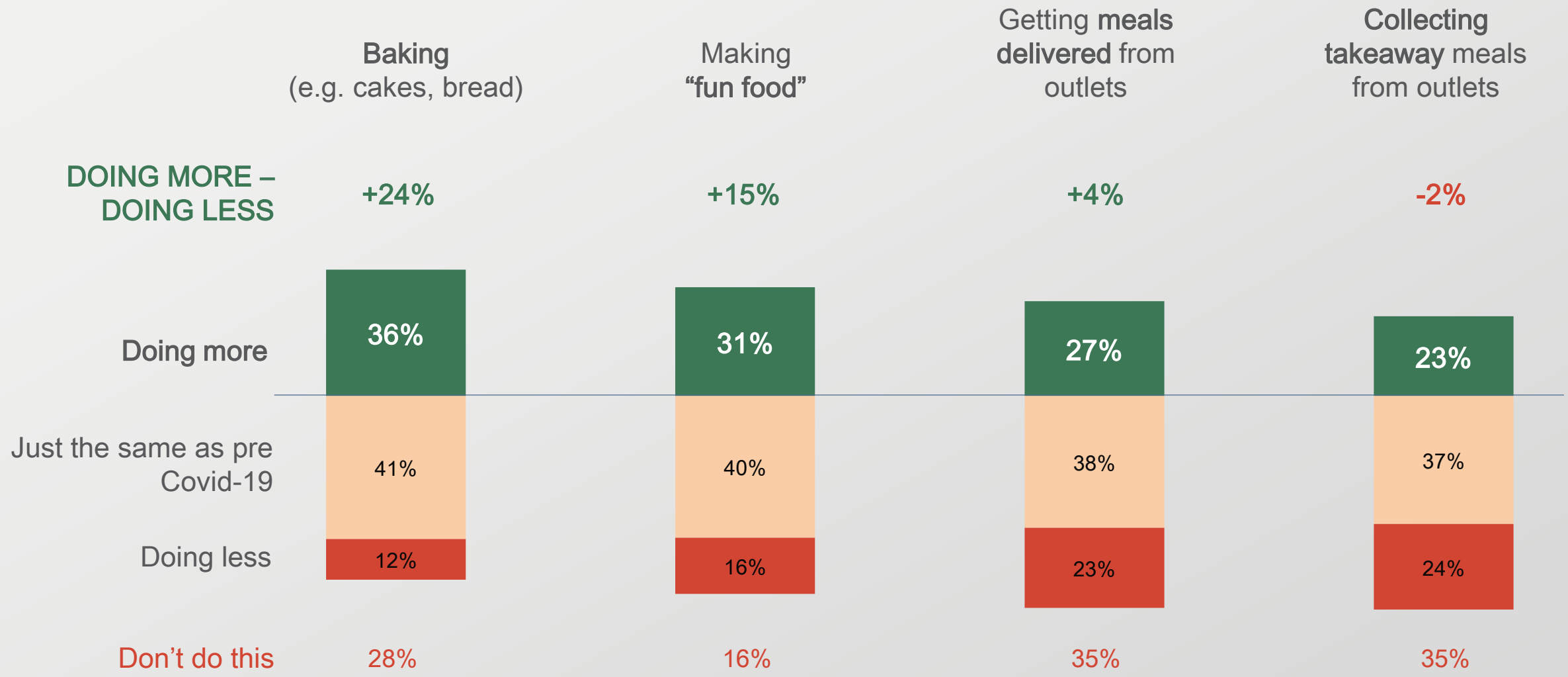
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Food & Drink – Behaviour Based

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19





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

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Food & Drink – Change since Covid-19

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19

Based on % DOING MORE - % DOING LESS



Buying better quality notably apparent as a result of the pandemic, but scratch cooking/ baking and using recipes also much more visible during this period.

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Food & Drink – Change since Covid-19

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19

Based on % DOING MORE - % DOING LESS



All age groups are buying better quality food while the over 35’s are have taken more to scratch cooking and using recipes.

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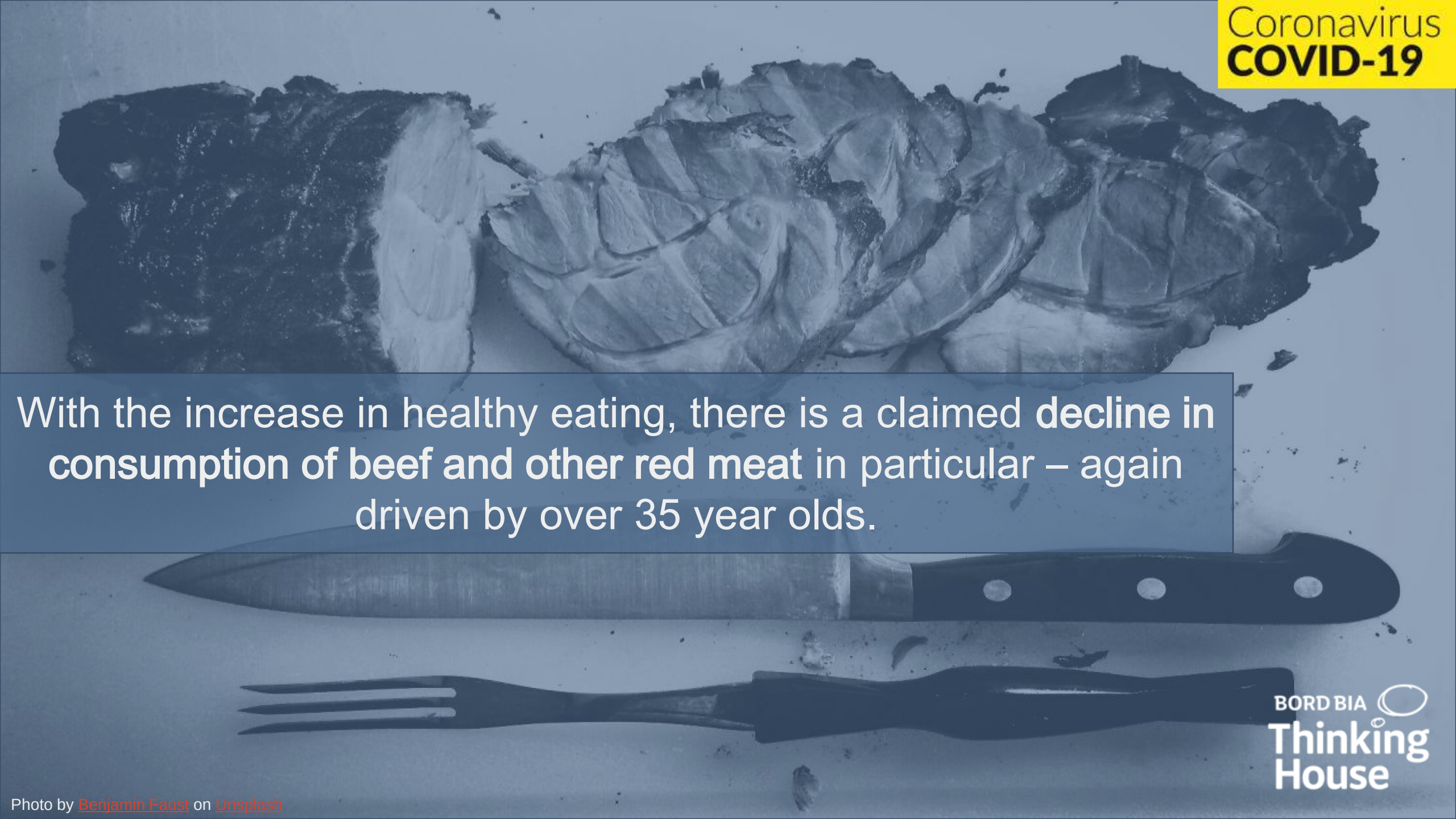


Coronavirus
COVID-19

There has been an **increased focus on healthy foods** during the pandemic with adults **consuming more fruit & veg, eggs and dairy produce** as a result, and over 35 year olds in particular

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Photo by nrd on Unsplash



Coronavirus
COVID-19

With the increase in healthy eating, there is a claimed **decline in consumption of beef and other red meat** in particular – again driven by over 35 year olds.

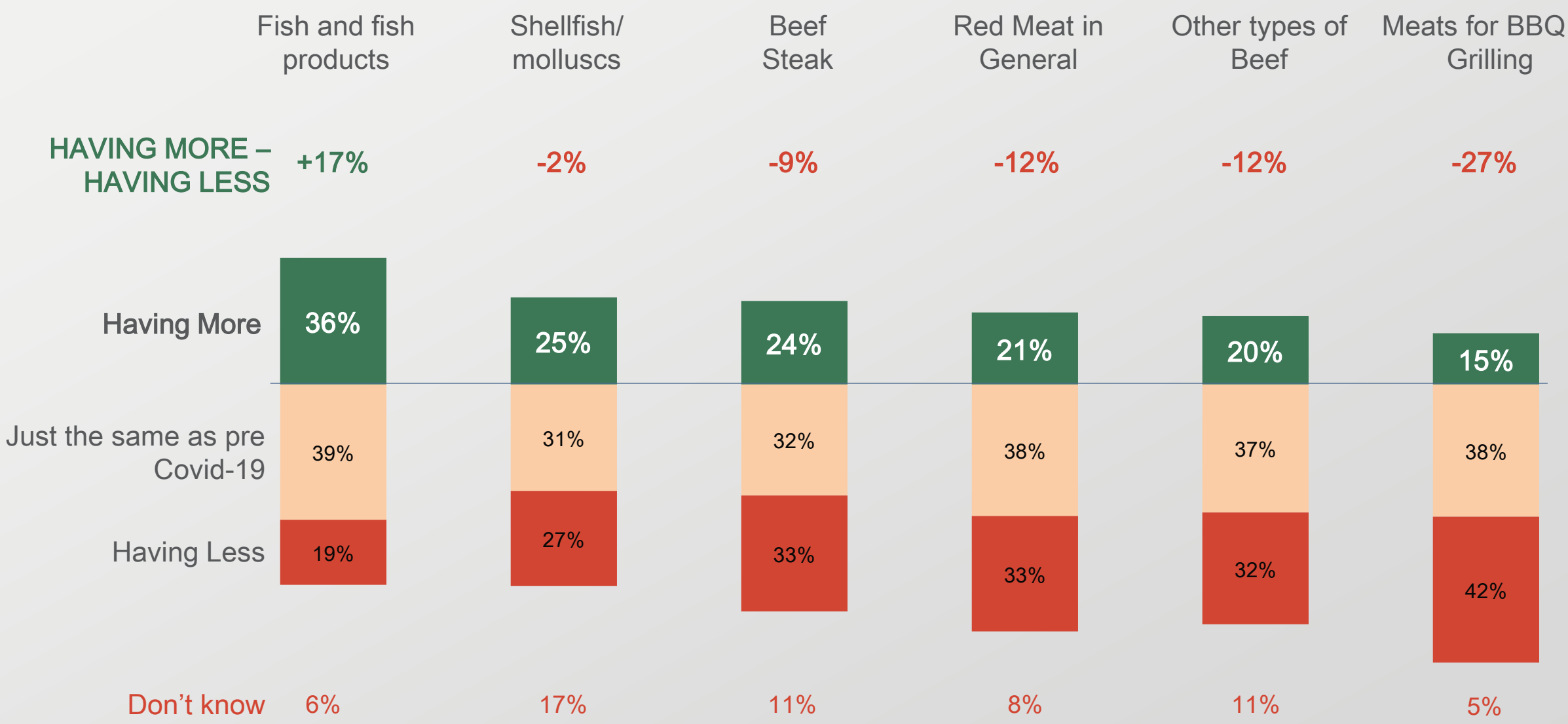
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Photo by Benjamin Faust on Unsplash

Meat & Fish – Consumption Based

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



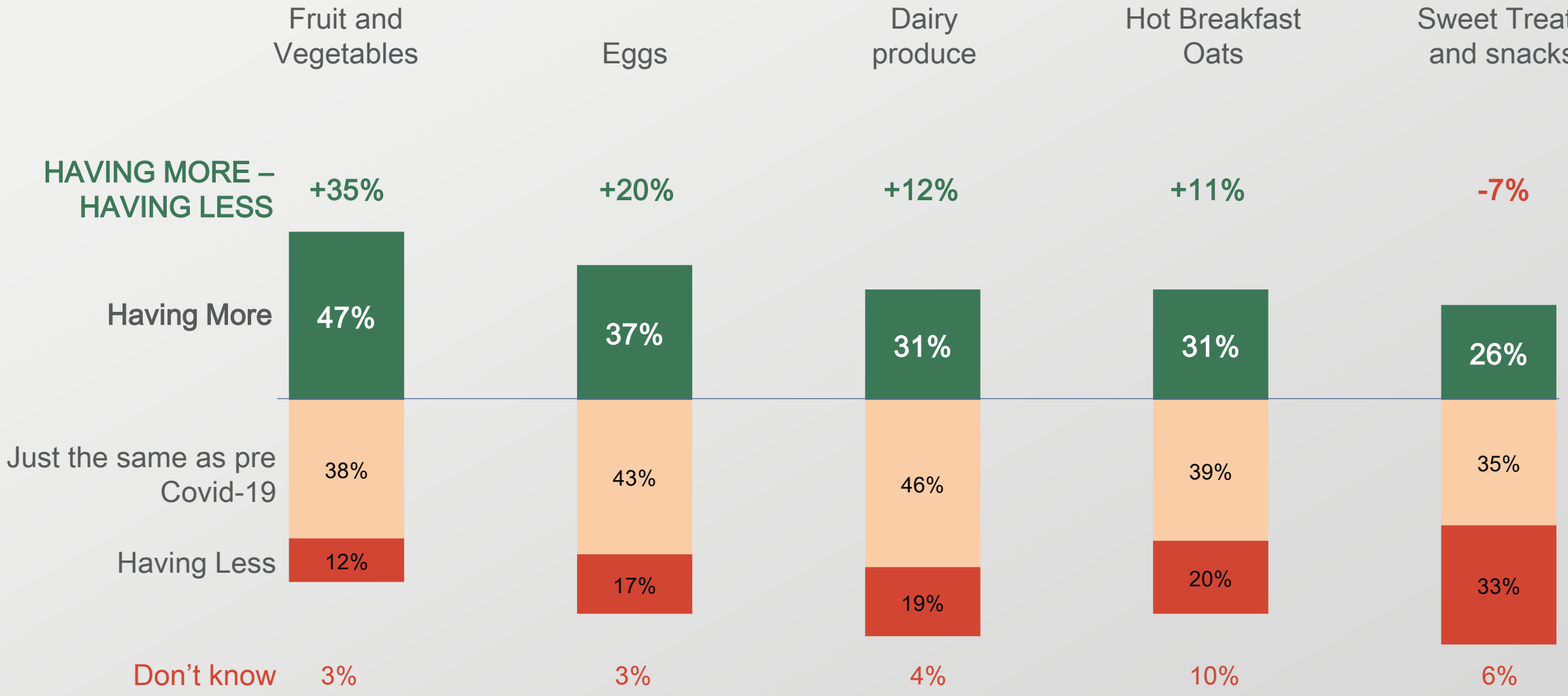
Covid-19 has had an impact on the types of food and drink people are consuming. Looking at each of these are you consuming more or less as a result of Covid?

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Other Foods – Consumption Based

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



Covid-19 has had an impact on the types of food and drink people are consuming. Looking at each of these are you consuming more or less as a result of Covid?

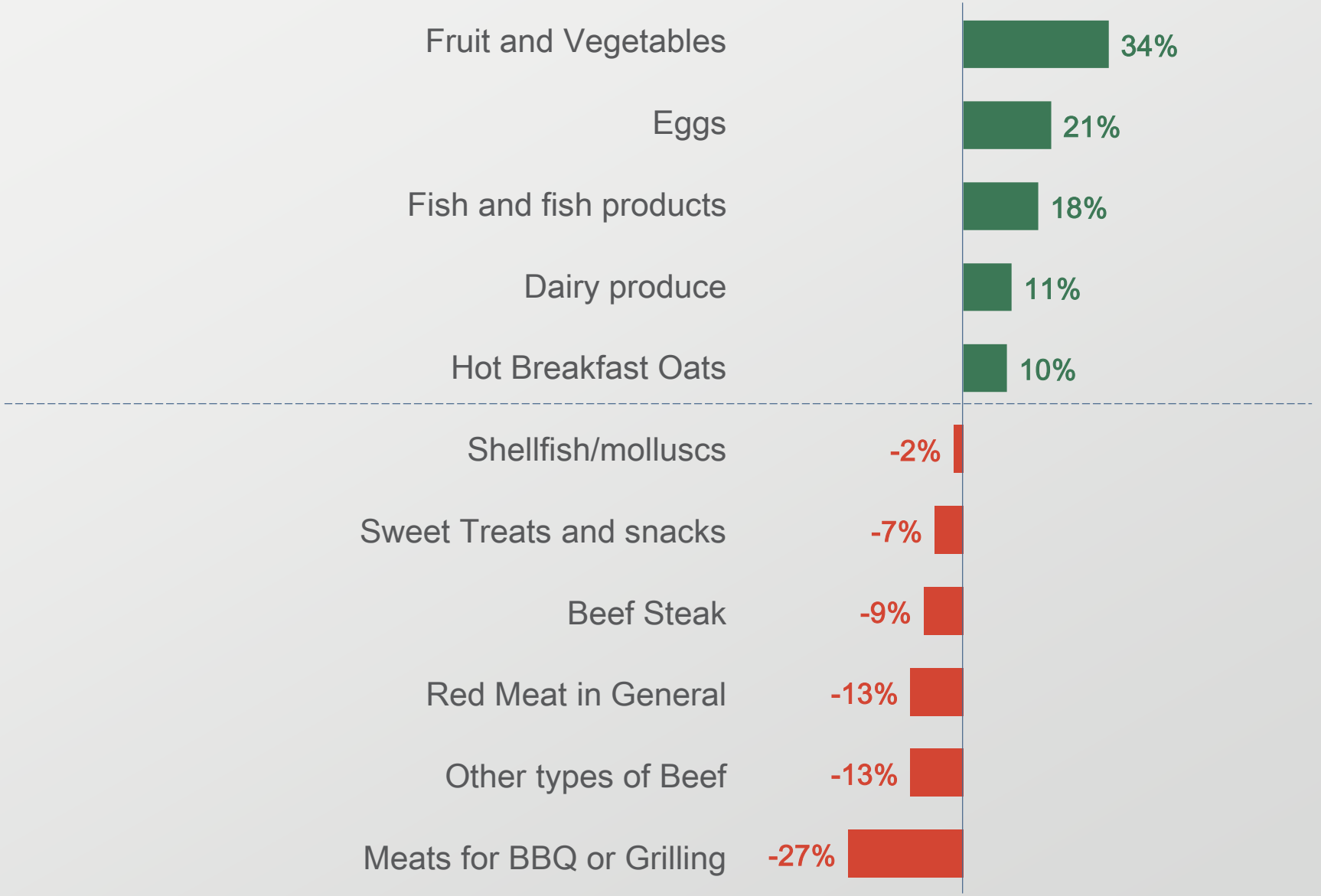
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Consumption – Change since Covid-19

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19

Based on % HAVING MORE - % HAVING LESS



The increase health & wellness activity is validated in the types of food being had more often as a result of the pandemic while also a notable claimed reduction in meat in particular.

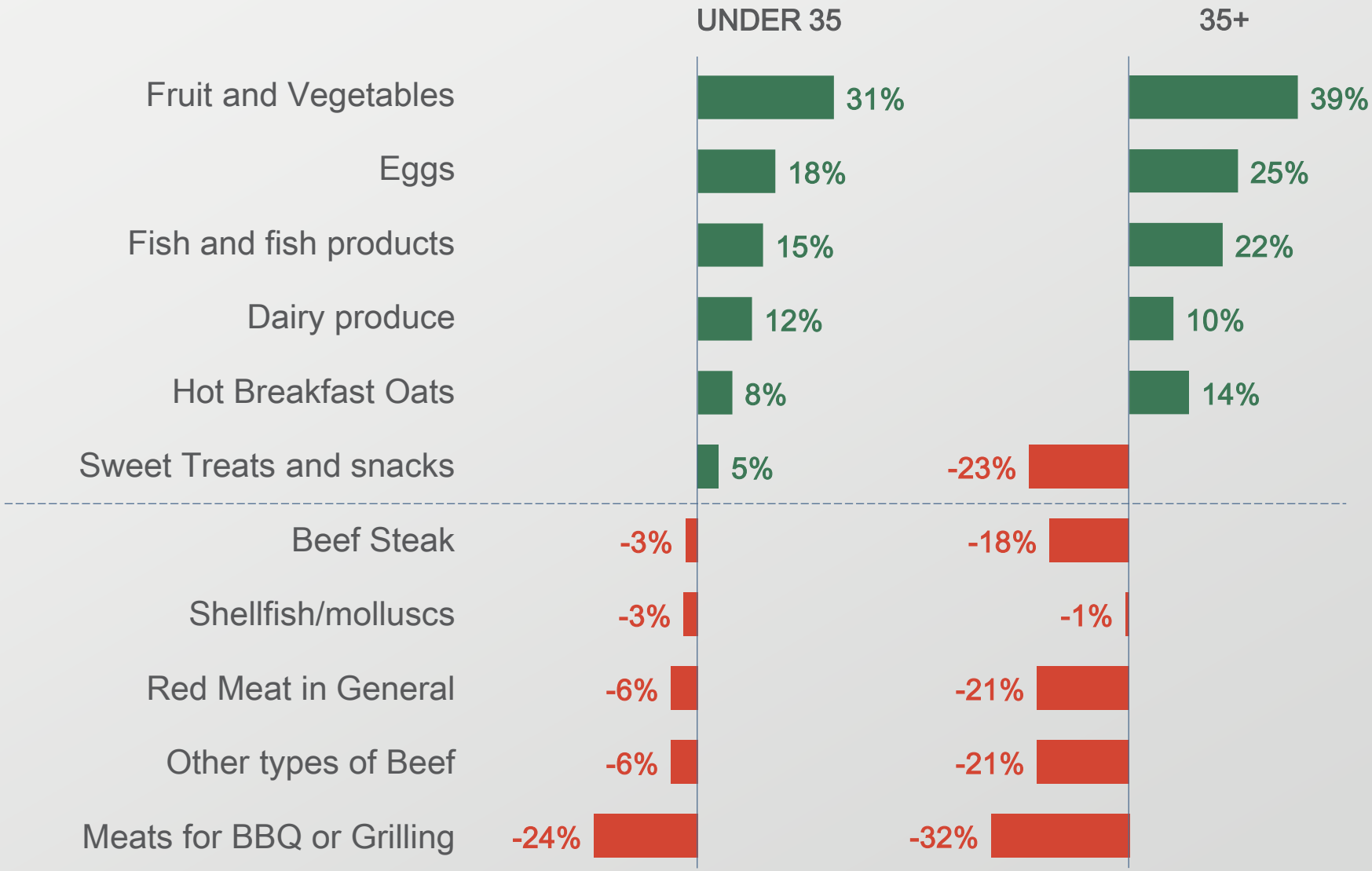
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Consumption – Change since Covid-19

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19

Based on % HAVING MORE - % HAVING LESS



The adoption of the healthier foods is more apparent for over 35's which coincides with their greater reduction in claimed meat consumption.

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ORIGIN

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Coronavirus
COVID-19

Relative to other key imported origins of food & drink in UAE, **adults are least familiar with Irish produce**.

Ireland's **relative strengths** are around its association with **clean air, environmental aspects and animal welfare**.

However Ireland **underperforms** on its **trust, safety and quality taste credentials** – areas of high importance among UAE consumers.

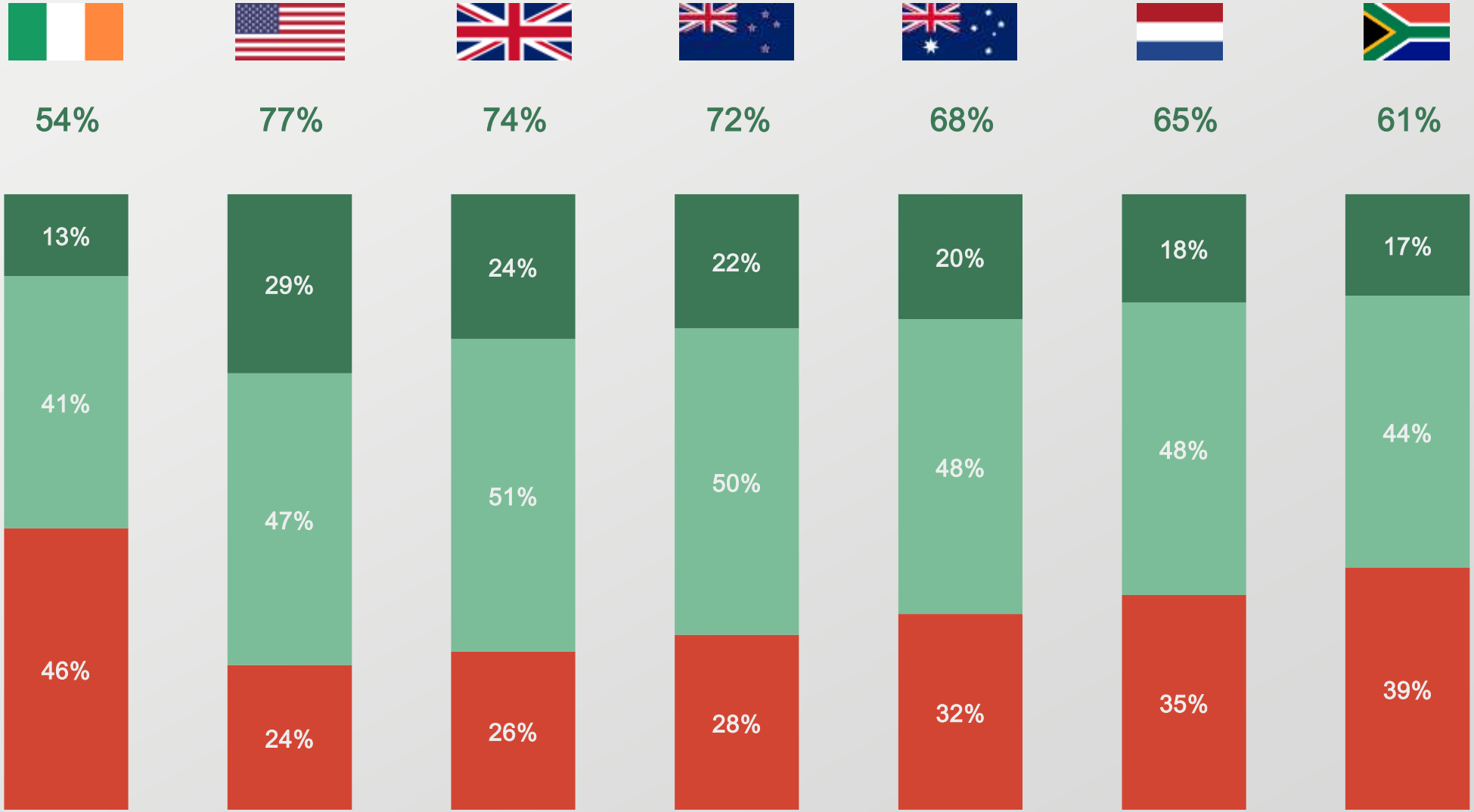
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Photo by Saad Chaudhry on Unsplash

Familiarity with Food & Drink Origins

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



Finally, when it comes to buying imported food and drink in UAE, how familiar are you with each of these overseas sources of food and drink?

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Origin Equity – among those familiar with each origin

(Base: Adults 18+ in the UAE, n=1,000)

Coronavirus COVID-19



		Rank	Gap to UK						
Has clean pure air	32%	*4*	*+11%*	21%	54%	42%	25%	19%	37%
Provide food and drink I can trust	30%	*6*	*-6%*	36%	50%	48%	26%	36%	36%
From a pure and natural environment	27%	*5*	*-1%*	28%	53%	46%	27%	23%	35%
Produces great quality, tasty food and drink	27%	*6*	*-9%*	36%	47%	44%	27%	41%	33%
Have strict systems for safety & traceability	27%	*6*	*-10%*	37%	48%	45%	19%	38%	31%
Produce food and drink that is safe	26%	*6*	*-7%*	33%	47%	42%	25%	34%	32%
Produces naturally nutritious foods	26%	*6*	*+1%*	25%	52%	42%	28%	27%	35%
Have good environmental sustainability	25%	*6*	*0%*	25%	47%	44%	24%	29%	35%
Has high animal welfare standards	25%	*5*	*0%*	25%	51%	48%	23%	27%	32%

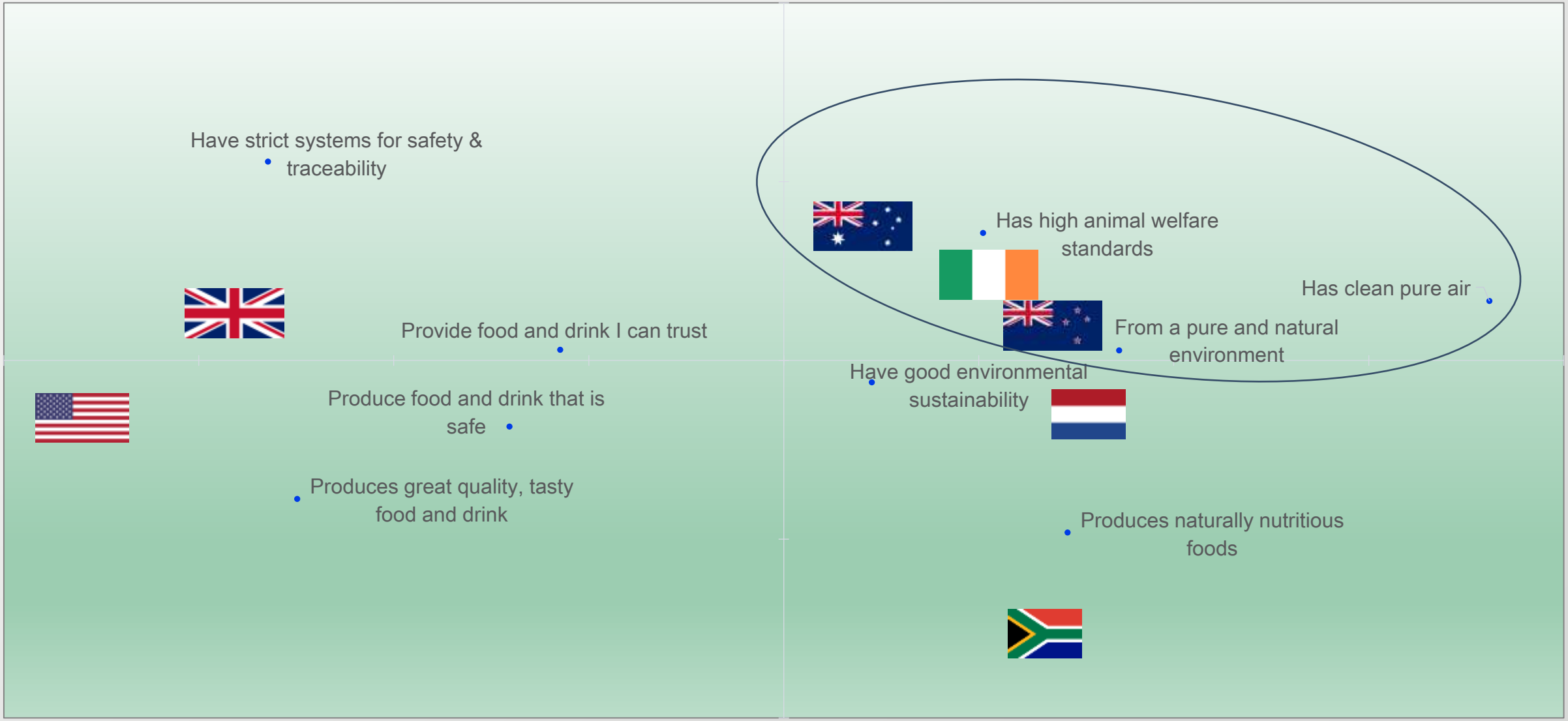
Finally, when it comes to buying imported food and drink in UAE, how familiar are you with each of these overseas sources of food and drink?

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Mapping Associations to Origins

(Base: Adults 18+ in the UAE, n=1,000)

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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

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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

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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







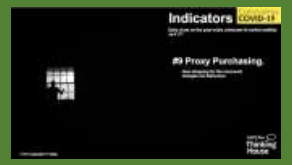




Shopping Behaviours









Consumption Behaviours

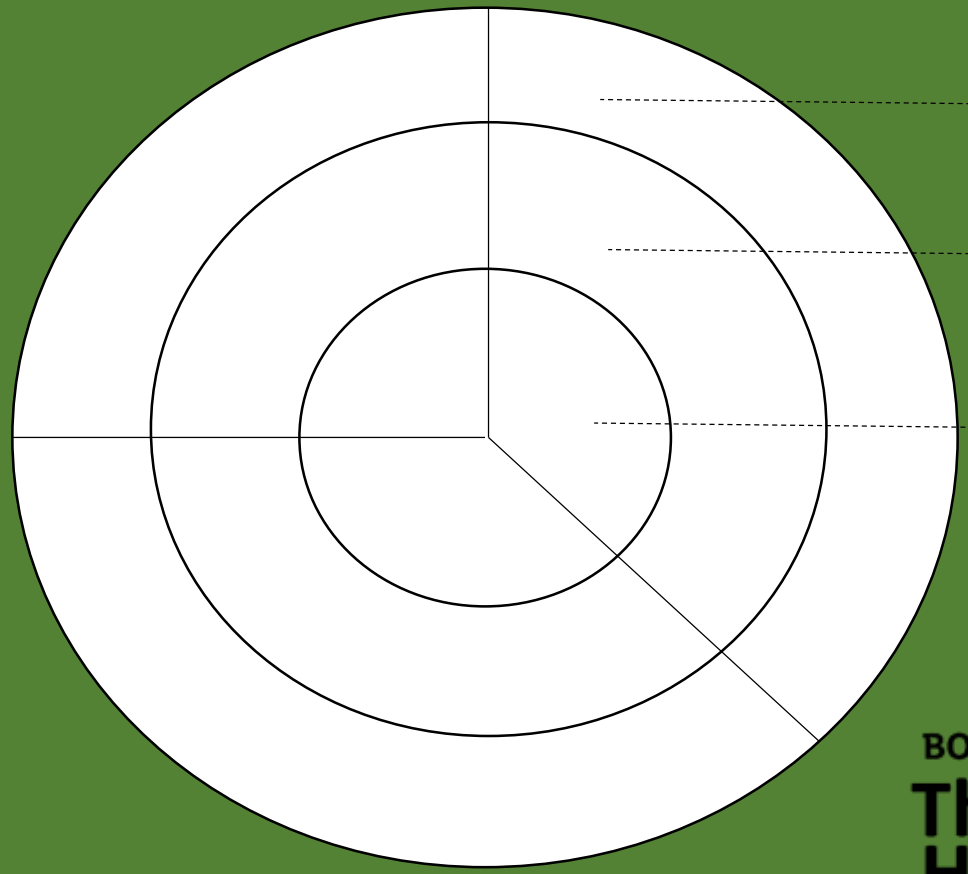








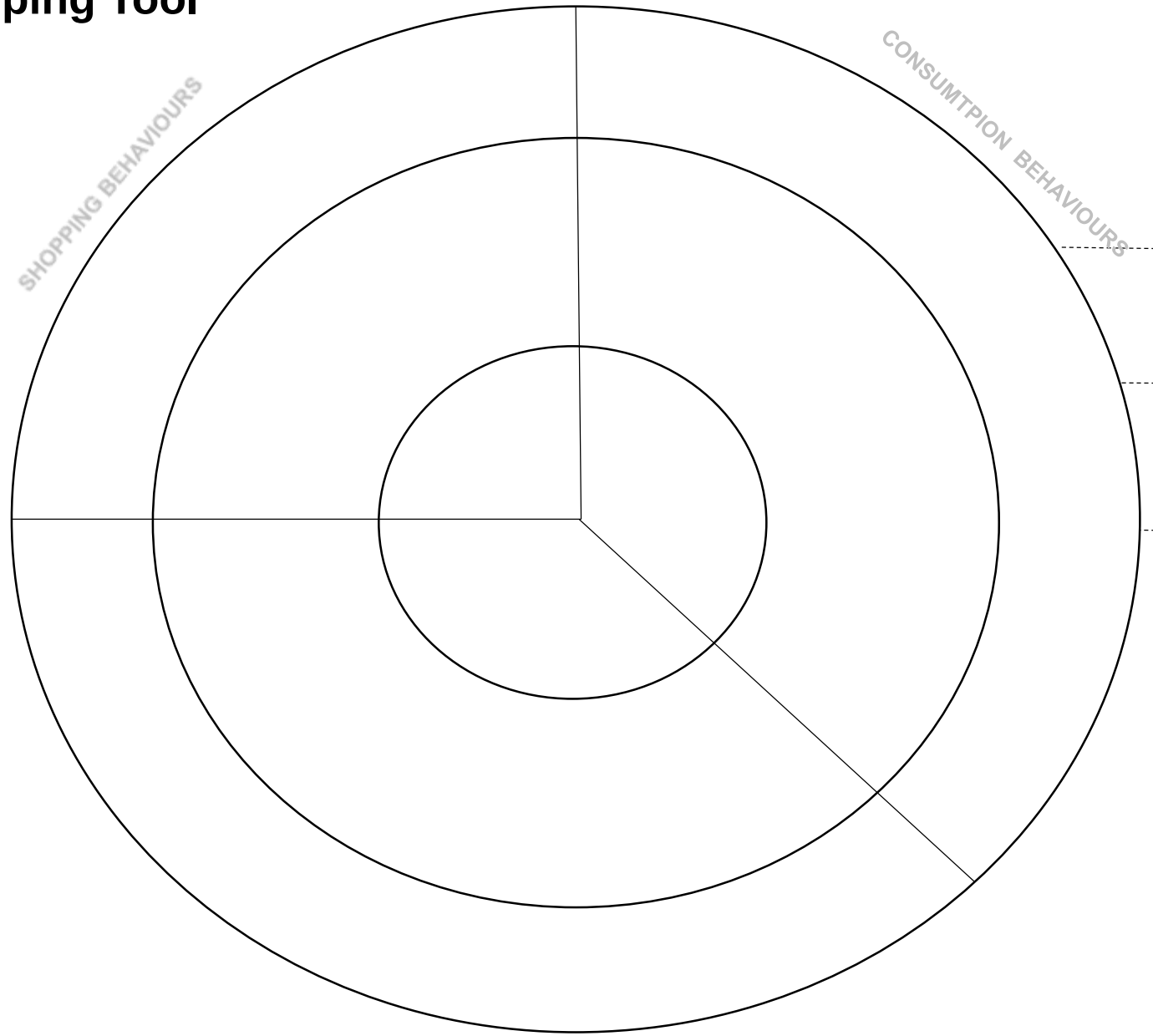




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Indicator Mapping Tool

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Low Impact Zone

Med Impact Zone

High Impact Zone

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2. Pressure Test

Planners

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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

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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

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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

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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

I

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

Planners

Coronavirus COVID-19

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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Planners

Coronavirus COVID-19

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

Planners

Coronavirus COVID-19

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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