Indicators

Coronavirus
COVID-19

Early clues on the post-crisis consumer & market realities
April 23rd



#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

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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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Habit no more or just new habits?

Author Virginia Heffernan writing in Forbes this month points out there has been a ‘fantasy’ doing the rounds in recent years; the idea we can all optimise our lives for peak performance, productivity, efficiency. (forbes)

A self-help book ‘cottage industry’ has sprung up with tips on how we can all ‘live our best lives’; The Four-Hour Workweek, The Power of Habit and Atomic Habits urge readers to automate certain behaviours to keep them dutifully overworking and under-eating.

Heffernan argues that the time to follow these ‘habit’ preachers is over and even points us to, consider Albert Camus, who, in *The Plague*, blames the obliteration of a fictional Algerian town by an epidemic on one thing: consistency. “The truth is,” Camus writes of the crushingly dull port town, “everyone is bored, and devotes himself to cultivating habits.” Its time, argues Heffernan to embrace, **The Power of No Habits**.

But is this realistic? Can we honestly expect our economies and workforces to function with any degree of efficiency again without people embracing habit? And in a world where enforced new ways of working emerge is it not inevitable that new habits will form? These are the questions at the core of our Indicators work. By understanding new consumer habits that emerge we can better understand how food and drinks producers can respond to our new habits.

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The hidden epidemic of boredom

In October 1918 the city of Cleveland introduced a lockdown, shuttering nearly all businesses after 8pm, a writer for a local newspaper observed that life had become “just a big vacuum, a big monstrous wad of nothing”. Sound familiar?

A survey, conducted by Harvard last week, of close to 3,500 adults living under national quarantine in Italy found that **BOREDOM** was among their most commonly cited negative side effects of the restriction. Boredom appeared even more frequently in their answers than “loneliness” or “lack of fresh air,” and trailed only “lack of freedom” as a source of misery*.

Some psychoanalysts believe that boredom, if it becomes entrenched, can become a neurotic condition called **ALYSOSIS**. And there are behavioural and consumption related pitfalls that we can draw a straight-line to from this condition.

For example, a recent study in the *Journal of Behavioral Decision Making* found that people prone to boredom reported greater risk-taking with their finances and even their health & wellbeing. Elevated risk-taking may even be due to the erosion of **SELF-CONTROL** that occurs when bored.

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Boredom & Burnout

For some of us, the very nature of work can be a source of boredom. A study by US workplace training firm Udemy found that 43% percent of workers report feeling bored at work. The research found that more women than men report workplace boredom (48% vs. 39%) and Millennials are almost two times as likely to be bored. 51% of respondents who described issues with boredom stated they feel this way for more than half of their work week.

It turns out that **BOREDOM** and **BURNOUT** are correlated. We see burnout as the result of doing too much and boredom as the result of doing too little. In fact, neither state is related to *quantity* of activities so much as *what* we're doing. Boredom stems from uniform, repetitive tasks. No matter how many emails we have to answer, we'll be bored if all of our tasks feel similar.

As we move through this new world of home-working and physically distanced interactions with our co-workers and fellow-human beings, there are significant dangers for our mental health. Stress is a real and often very hidden phenomenon for us all and its even more hidden in the current climate.

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Homeworking: Isolation, Anxiety & Burnout

While some consumers have found it a relief to give up the daily commute and work at their own pace, others find it stressful, feeling remote from the office at a time when companies are making cuts and 'furloughing' workers.

Nick Bloom, a senior fellow at Stanford Institute for Economic Policy Research, who has researched the impact of homeworking on productivity, says "forcing everybody home, often around kids, in shared rooms or bedrooms and no escape socially in non-work time will be generating major mental stress". "This typically leads to loneliness and depression," he adds, "which is mentally costly and often leads to physical health declines too." (ft.com)

The concept of the **IDEAL WORKER** is one that pervades the culture of many workplaces – a worker with a clear, relentless commitment to paid work.

Working long hours and not allowing distractions outside the paid work environment to interfere with the job, including family and personal facets of life are central components of what is expected of this type of worker. If this cultural reality exists in many workplaces today, its hardly surprising that stress-levels may be on the rise in a hidden way in our homes.

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Boredom, Self-Control & Dietary Shifts

The early evidence would suggest that consumption of sweet treats and snacks has seen the most dramatic change in dietary behaviour since the crisis began.

Some 37% of Irish adults are snacking and eating sweet treats more now. A significant shift by any measure. But can all of this be explained by boredom, lack of self-control or the on-set of alysosis? Actually it would appear not.

The uplift in snacking and consumption of sweet treats is **even higher** amongst those consumers who are working from home (46%). So something else is going on.

Either we have a lot of very bored ‘home workers’ in the country or consumption of sweet treats and snacks is on the rise for other reasons too…

37%

of Irish adults are having sweet treats and snacks more now as a result of the Covid-19 response

Source: Bord Bia Indicators Barometor

46%

of Irish adults who are now working from home are having sweet treats and snacks more now as a result of the Covid-19 response

Source: Bord Bia Indicators Barometor

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Self-Control & Drinking

One of the most high-profile ‘hidden consumption’ behaviours that has been gaining attention in recent weeks has been around alcohol consumption.

Our research reveals quite a stark picture of an uplift in consumption in the order of between 17% (weekends) and 20% (weekdays). The psychology of this behaviour change has been well documented elsewhere and health care bodies are expressing concerns about the long-term health impact of increased consumption.

But perhaps consumers are finding their own equilibrium. Our research also reveals that 30% of Irish adults have increased their water consumption and two thirds of these people expect this behaviour to continue into the future.

The long-term behavioural shift in this area is one to monitor.

20%

of Irish adults claim they are drinking alcohol more during the week a result of the Covid-19 response

Source: Bord Bia Indicators Barometor

30%

of Irish adults claim they are drinking water more as a result of the Covid-19 response

Source: Bord Bia Indicators Barometor

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How are we all feeling?

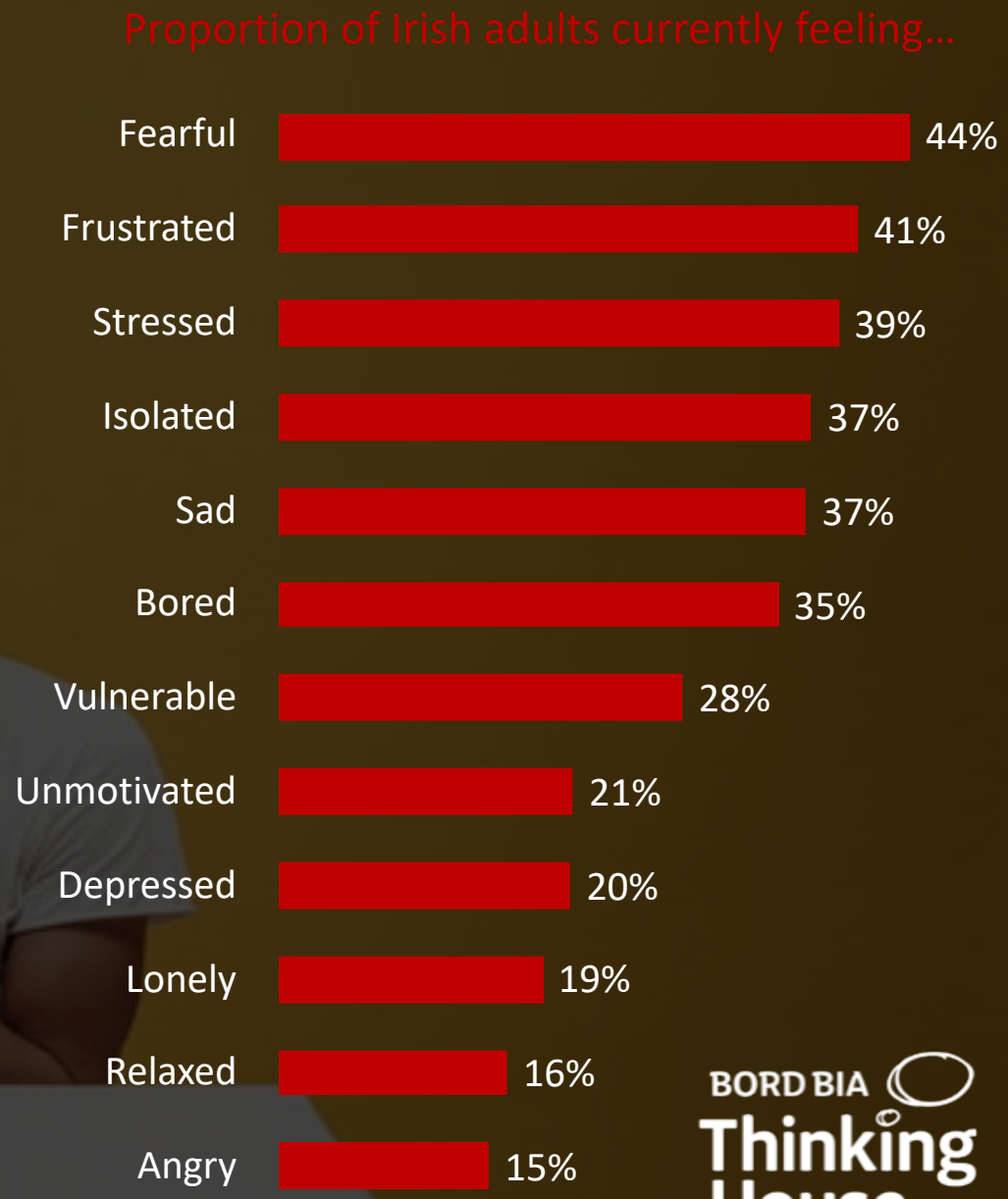
Given the daily news and the realities that many of us are facing, its hardly surprising that Irish adults are experiencing some very negative emotions.

Fearfulness, Frustration, Stress and Isolation all top the list of emotions the population is experiencing. But it is most informative to look at that how that breaks down by age group.

The 18 to 34 Years Olds are most likely to claim they feel **LONELY, ISOLATED & BORED**. Perhaps reflective of how many younger peoples' social worlds have been disrupted.

The 35 to 54 Years Olds are most likely to claim they feel **ANGRY & SAD**. Perhaps reflective of the stresses of balancing 'full-houses' and home-working.

While over 55s are most likely to feel **FEARFUL & VULNERABLE**. But also **RELAXED**, reflecting the differing experiences within that age group.



Source: Bord Bia Indicators Barometor

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Homeworking & Family Time

Our research reveals that 40% of Irish adults are working from home more as a result of the Covid 19 response. It also would appear that is is likely to be a **'sticky'** behaviour with half of those workers expecting to continue to do so more often in the future.

The good news is that for over half that 55% of those working more at home now as a result of the Covid-19 response are having more quality family time at home, and 52% of this group are taking more walks and spending more time outdoors as a result.

So there is an upside to the new reality for a good many people. But on the flipside that does mean we have almost half of the at-home workforce who are not seeing this positive change in their lives. Perhaps they are the group we need to pay most attention to…

55%

of those working more at home now as a result of the Covid-19 response are having more quality family time at home

Source: Bord Bia Indicators Barometor

52%

of this group are taking more walks and spending more time outdoors as a result

Source: Bord Bia Indicators Barometor

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Us Time: “Honey I’m (always) home”

Beyond the somewhat predictable shifts in family life that have emerged from Covid 19, there are more subtle changes emerging in our hidden lives.

Covid 19 has taken co-existence to new levels especially with all our usual social outlets now gone and our office in our homes, the focus on each other is more intense.

‘Date Night’ outside of the home has disappeared – for now – but online solutions are emerging. The Date Night app allows couples map out the week and carve out time for themselves for example

Equally, lots of restaurants our tapping into ‘date’ delivery services. One example of a restaurant offering an interesting delivery service is Mystery in Seattle. A great example of a brand trying to tap into a way to ‘break the boredom’ of lockdown.





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The world of the Millennial

Of all the age groups most impacted by Covid 19 it has to be the poor Millennial who is most disrupted. Where does one go for avocado toast and a bottomless brunch these days?

They are the group that likely had most involvement in the now disrupted ‘gig economy’. This is the cohort who have been blending work and life and seeking a more flexible way for some time. Now that its here it’s bought some surprising results.

While this is the age group that really started to live out their life on-line, they are missing the physical contact of the office and peers, for many younger millennials and Gen Z, the office is actually a key part of their identity. Perhaps more than they thought. A recent study carried by Opinions on behalf of the National Employment Federation highlighted how missing social interaction with work colleagues is identified as the number one negative or challenge experienced to date by 54% of those working from home.

This group also don’t like being tied down however coming out of Covid they are likely to have more concerns about stability and perhaps saving for their future (Forbes April 2020). These concerns could have implications for how they budget for food and groceries into the future.

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Feeling the pinch again

While much of this indicator focuses on ‘hidden’ behaviours that consumers are adopting in response to the stress of balancing work and home-life, lets also pause to consider the dramatically changed circumstances for those who have lost the incomes or had their incomes severely reduced.

We may find a unique set of hidden behaviours in that group over time but the early clues are quite stark. Unfortunately a reliance on food banks is upon us once again with SVP reporting across the country requests for help are up on average by 10% for the first three months of the year as over 44,000 people have reached out to the Society for help with basics like food and fuel.

In the UK, According to the Food Foundations’ research published last week, 6% of UK adults, the equivalent of 3m people, told them that lack of food had forced someone in their household to go without eating during the past three weeks. YouGov research found 16 per cent of respondents (equivalent to 8.1m people), said they faced food insecurity of some kind as a result of the pandemic.

We are moving into an era where reduced incomes will dramatically impact consumer behaviour.

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