Coronavirus
COVID-19

Future Proofing Toolkit



Spain 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

Early clues on the post-crisis consumer & market realities
March 30th

#1 Shielding.

Consumers are shifting to protection for their insides and outsides

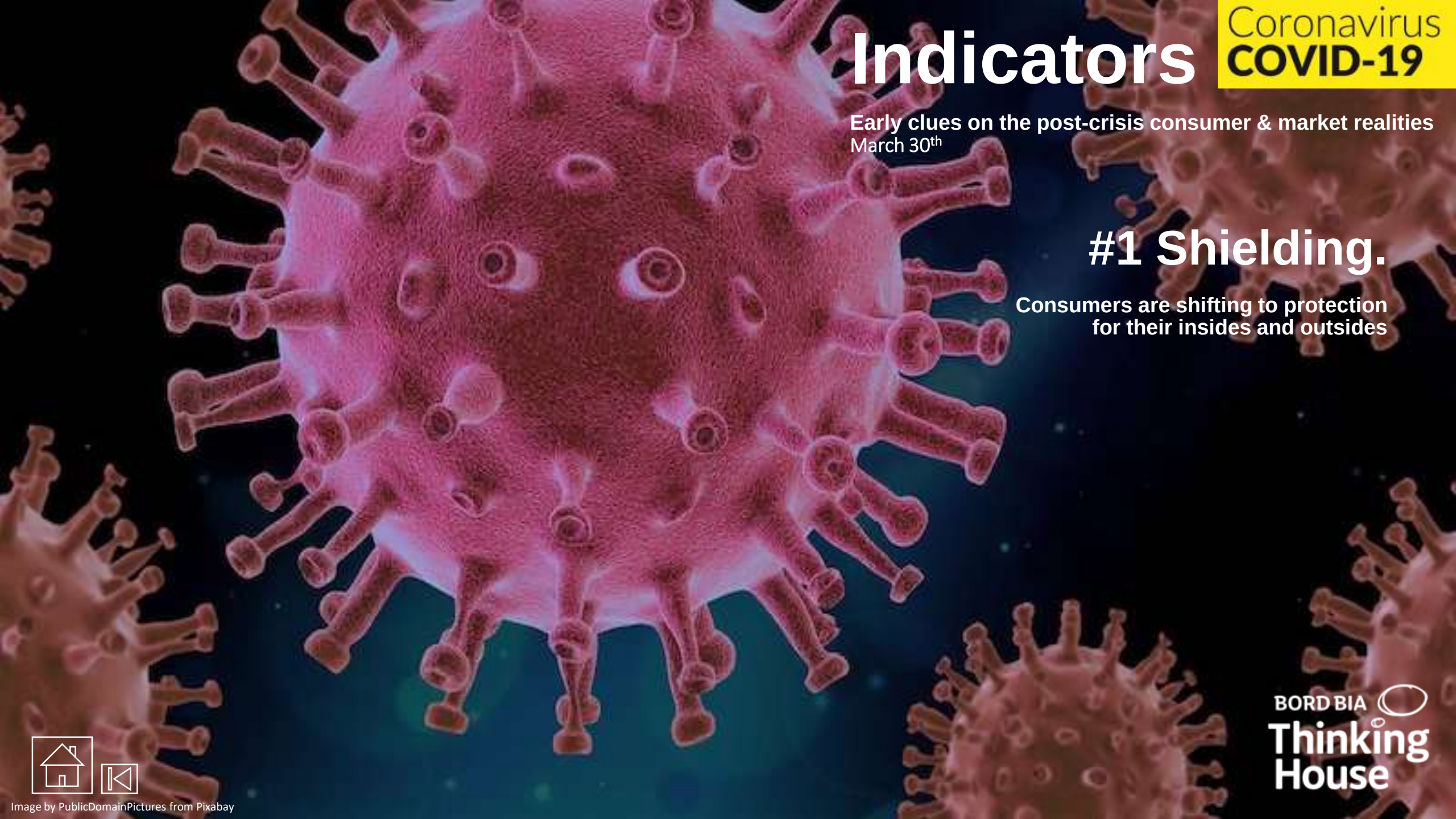

Image by PublicDomainPictures from Pixabay

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#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 signed 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 globalized world, will all create great desire for shielding and self- protection.

Foods that can **protect our defence systems** are likely to grow in popularity. This will see 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.

We call this early indicator **SHIELDING**.

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#1 Shielding.

Consumers are shifting to protection for their insides and outsides

Google searches featuring the term food, immune and system have spiked since mid-March. As the crisis has deepened consumers have moved to any source they can to find ‘new’ ways to boost their immune system.

This early indicator signals that consumer will pay even greater attention to the world of functional foods. But they also pay greater scrutiny to the claims that food brands make.

Our Indicators tracker in Ireland, in April 2020 revealed that 29% of Irish adults are now eating healthier for ‘improved immunity’.

That figure jumps to ***37% among all under 35 year olds.*** Clearly, healthy eating for immunity has as stronger appeal amongst the valuable millennials cohort.

32%

of Spanish adults are now eating healthier for improved immunity as a result of the Covid-19 response

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#1 Shielding.

Will consumers pay greater scrutiny to immunity claims

Immune building vitamin and minerals include Zinc, elderberry, and vitamins C and D and are just some of the substances that have been researched for their immune-enhancing potential. However, Post-Covid, brands will need to be mindful of the degree to which they deliver on an immunity claim. In a world of ever present fake news, the message needs to be rooted in truth.

ONE TO WATCH

Kellogg's Special K Immune Support: Multigrain Flakes with Cherry, Dark Chocolate & Almond.

Enriched with nutrients to help support normal function of the immune system, providing 50% of the daily needs of vitamins D, B6, B12 and Folic Acid.



THE INDICATOR

Immune Support

Is this a strong enough claim Post-Covid?
Will Kellogg's pivot from this positioning?

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#1 Shielding.

Will hand held snacks have to change their ways

Hand hygiene has also top of mind and now part of every day living. Retailers have responded to this with stores offering free hand washing facilities in store. As we self protect into the future it is likely to be a habit that could become more engrained. And how we eat hand-held snacks may well evolve…

ONE TO WATCH

Glico Grape Ice Cream Balls from Japan claim to keep hands clean and free of melted ice cream.

According to the manufacturer, 'the bag can be ripped a little to remove one ice ball at a time, making it possible to consume it without touching the ice cream'.



THE INDICATOR

Hands Clean Claims

Will new pack formats emerge?
Will ‘contact free’ hand held snacks grow?

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#1 Shielding.

Increased screen time could see greater focus on eye protection

Protecting eyes has also become part of the Covid conversation but there is also the knock on effect of increased screen exposure.

This undoubtedly will represent an opportunity too for food and drinks brands. Highlighted as an emerging future platform in our functional food playbook, it may be something that represents a more “near in” opportunity as we potentially work, shop and socialise online more into the future.

ONE TO WATCH

Macu View is a Dutch dairy drink containing lutein-, zeaxanthin- and DHA-enriched egg yolk significantly improves macular pigment optical density, visual acuity



THE INDICATOR

Eye Protection Claims

Will new innovations emerge?
Will protection claims emerge?

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
March 30th

#1 Shielding.

Implications for Irish Food & Beverages

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

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
March 31st

#2 Comfort Cooking.

Consumers are retrenching to familiar old favourites and forming new habits



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Image by PublicDomainPictures from Pixabay

#2 Comfort 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 the 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 to unfamiliar new world.

We call this early indicator **COMFORT COOKING**.

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#2 Comfort Cooking.

Familiarity breeds comfort in a world we no longer recognise

Research agency Behaviour and Attitudes, have been monitoring consumer sentiment since the outbreak in Ireland. They find that 46% of Irish people creating more tasty meals that everyone can enjoy and 44% claim more of their main meals are now eaten with others .

As everyone has descended on the home and as we hunker down, pleasing people through food is a priority. Cooking has become a focal point of households' day in a way that hasn't been the case for many years. As long days stretch out for consumers, cooking is especially important to make the day exciting and interesting.

Unsurprisingly sales for comfort carbs such as pasta and noodles are all in growth. This isn't surprising when we know that Italian pasta meals with tomato sauces are firm family favourites (What Ireland Ate Last night).

In the UK sales of dry pasta were up 55% year on year in week ending 8th March according to Kantar. Nielsen also noted in the UK that many UK stores have been emptied entirely of pasta, noodles, bread and also rice with a similar picture apparently emerging in Ireland.

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#2 Comfort Cooking.

Familiarity breeds comfort in a world we no longer recognise

Our Indicators tracker shows that there is a real retrenchment into ‘old ways’ of living and cooking.

Some 41% of Irish families are eating together more now as as result of the lockdown. Hardly all that surprising given our inability to leave our homes.

The figure of 27% of consumers choosing their favourite foods more as a result of the lockdown is also interesting. This figure jumps to 31% of amongst consumers of family lifestage.

We also see from our own data that lockdown impacts the ‘quality’ of the familiar favourites that we buy.

Almost 2 in 10 (17%) Irish adults are buying better quality beef or better quality cuts of beef as a result of the Covid-19 response.

62%

of Spanish families are eating together with their families more now as a result of the Covid-19 response

29%

of Spanish adults are choosing familiar favourite foods more now as a result of the Covid-19 response

17%

of Spanish adults claim to be buying better quality beef as a result of the Covid-19 response

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#2 Comfort Cooking.

Inspiration is part of the story and some of these recipes will stick

“Cabin fever cooking” has brought with it new virtual learning experiences with many new chefs now running courses and cook clubs online. Jamie Olivier is even filming his new cooking programme on his mobile phone!

For some consumers, access to their favourite restaurants and takeaways has been cut-off so they have no choice but to thrown their hand at their own take on their favourite dishes. Media coverage and online searches for ‘take-out style recipes’ has exploded…





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#2 Comfort Cooking.

Just how ‘sticky’ are these new cooking habits

According to a research study in University College London, it takes on average 66 days to change a habit – so is cooking something that is likely to stick as we emerge from our cocooning?

Early indicators would suggest that with these new learned habits and new found interest in cooking, some changes are likely to stick. While we may move on from comfort cooking, it’s likely that some family favourites will remain so. And also that new family favourites emerge. We are in the midst of a revolution in cooking upskilling with consumers adding new dishes to their at-home repertoire on a daily basis….



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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
March 31st

#2 Comfort Cooking.

Early Implications for Irish Food & Beverages

- **Consumers embrace comfort foods**
- **Consumers replicate their take-out favourites**
- **Consumers reject convenience cooking**



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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
March 31st



#3 Simply Safe.

Consumers are looking for security in simplicity, transparency and familiarity

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#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 Coronaavirus. 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 SAFE

Think about how “safety-first” consumers will respond

Many of the fear responses we see from consumers are arguably irrational but it is deeply ingrained human behaviour that is hard to subdue. “Nation Brands” as well as consumer brands are seeing the effect of this unstoppable quest for safety.

Google Trends data shows that interest in cuisines from China and Italy have plummeted in recent weeks by 33 and 24% respectively. This raises an interesting question about the role that a nation’s Coronavirus response could have on food exports from that market in the future. Also, referencing the fact that half of Italian agri-food exporters had received Corona-related cancellations of orders from abroad; with some seeking “virus-free” health certification, Coldretti/Ixe research are devising a plan to fight the “misinformation”.

Indeed in the world of brands, a survey by 5WPR in the US claims that 38% of US beer drinkers would not drink Corona beer under any circumstances at the moment, so this pandemic is raising irrational questions about the safety of the brand.

Guidance too issued in good faith on washing fresh fruit and vegetables with soap and water or peeling have been doing the rounds too have leading some to question incorrectly the safety of fresh produce. We also are picking up on people baking bread to avoid eating foods that others may have handled and questions arising for some about the safety of delivery services…..

While possibly extreme, these only serve to highlight the sensitivity of consumers at this time. Brands operating in this new World need to be open and honest and to leverage available assets that can authentically underpin a trust and safety.

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#3 SIMPLY SAFE

Our own indicators tracker confirms this phenomenon in Spain

71%

of Spanish adults have minimised their trips to the shop as a result of the Covid-19 response

39%

of Spanish adults are now doing more cooking from scratch as a result of the Covid-19 response



33%

of Spanish adults are now stocking up more on essential food and drink for their homes as a result of the Covid-19 response

15%

of Spanish adults are now preparing large batches of food to store more often as a result of the Covid-19 response

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#3 SIMPLY SAFE

Driving “Safety First” with Hyper Transparency



Couriers]for Meituan, China's biggest food delivery company, undergo temperature checks with the information provided to customers © Meituan

In addition to the usual price and other information, many restaurants are also providing a “reassurance guarantee” with the temperatures of the cooks, food packages and courier with every order.

Yuan Yuang, FT, 11 Feb 2020, **Beijing**

“More than ever, shoppers want to understand the supply chain, with complete transparency from farm to factory to distribution, and they want details of the measures being taken to assure their safety”. (Nielsen).
In this context digital traceability and blockchain technologies are likely to get a boost as will businesses *“that have a proven ability to produce, store and distribute food safely over large distances”*
(Joe Gill, Irish Examiner).

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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 its 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)

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
March 31st



#3 Simply Safe.

Consumers are looking for security in simplicity, transparency and familiarity

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
Apr 7th



#4 Trace Tech.

Consumers are sharing their data in new ways

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#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 downloads 1m times in the first five days of its life.

While in South Korea where 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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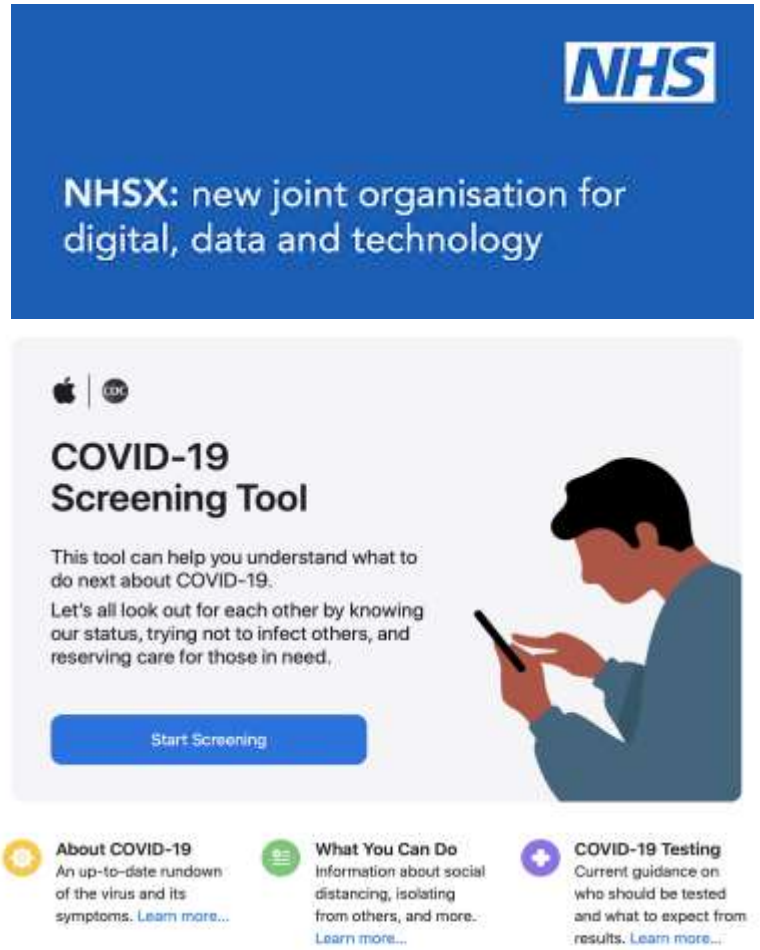
#4 TRACE TECH

Contact tracing apps are about to land in Europe and US

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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#4 TRACE TECH

A Tipping Point For Data Sharing and Automation?

Current observations would suggest that online grocery—even for global specialists such as Amazon and Ocado—is already very congested. Many consumers are experiencing long lead-times for home-delivery.

Equally, however, it would appear that many shoppers are trying online shopping for the first time. As retailers scale-up capability online we may well find the ‘automation’ of order groceries kick-ins as a behavioural norm.

We are seeing the early stages of this emerge in the US market already. California based Superior Grocers have adopted Itasca Magic’s computer-generated ordering and direct-store-delivery (DSD) receiving solutions to replace existing legacy software for its retail locations.

Superior’s ambition is for their shoppers to experience “near-perfect availability” of the products on their lists via automation.



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#4 TRACE TECH

Data Enabled Contactless Grocery Shopping

New York based FutureProof Retail is making its Mobile Checkout Solution free of charge for retail food stores and pharmacies nationwide during the coronavirus pandemic.

The New York-based company said its Mobile Checkout, which allows shoppers to scan items with their phones as they shop and pay with a scan at a mobile checkout station, is helping shoppers practice social distancing—avoiding lines, interactions and additional product handling—while enabling them to get the food supplies they need amid the coronavirus pandemic.

According to Winsight Grocery Business, FutureProof is in place at Fairway Market stores in New York, which has been recommending the app as a part of its safety recommendations to shoppers.

Since that campaign began, Fairway has seen app adoption increase by more 300%, with 20% of transactions now coming through the mobile checkout app in its city stores and as much as 30% at some locations.

53%

of Spanish adults are using contactless card payments more often as a result of the Covid-19 response

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#4 TRACE TECH

Data Enabled Contactless Grocery Shopping

We know the grocery shoppers of the future will be ‘digital natives’ those who have always had access to computers and the internet and therefore rapid change is the norm for them.

Ernst & Young in their Eight Forces That Will Shape The Future Consumer Report, identified the Smart Consumer, who will use AI to optimize everything including what they eat.

These consumers are likely to allow AI bots and smart home services to perform consistent purchases, and people will trust them to make the right decisions. Running low on milk? Your smart fridge will order it for. Eating too much saturated fat? Your health app on your phone will block you from over ordering on you Amazon or Tesco app.

Advances in wearables and nutrigenetics that allow consumers to customize a diet that is ideal for them will be possible. All of these one-time pieces of ‘science fiction’ are coming to pass and its all because **people are getting more comfortable sharing their personal data**. These are the long since predicted Smart Shopper behaviours we’ve been told about for years.

We may well look back at the Covid 19 pandemic as a period that accelerated adoption of technologies such as a AI.

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
Apr 8th



#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

Early clues on the post-crisis consumer & market realities
April 9th

#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

With nearly than 3.5 billion people in isolation, much of the world has had to readjust to new ways of communicating and connecting.

As social creatures, we seek out company and so we have found ways to gather on line, thanks to advancements in technology. Every day in nearly every home new experiences are happening in terms of virtual living that are likely to change how we live out our lives into the future.

As people crave company and are trying to manage heightened anxiety levels, they need to establish some sense of normality by continuing their weekly routines and social activities. And so we have seen digitalisation accelerate as people bring their everyday lives online.

These social gathering can be as simple as a House Party group chat to Quarantine Night Clubs. In fact, the founder of Zoom has increased his networth by more than $4bn since the corona virus started. (Guardian, 31 March)

What's interesting to see is how brands have interacted and engaged with these new online behaviours to bring their consumers together.

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#5 The New Social

The Virtual Dinner Party

The Virtual dinner party is becoming a place to "hang out" with friends - with recipes for virtual dinner parties and "quarantinis" emerging online.

Derek Brown, author of "Spirits, Sugar, Water, Bitter: How the Cocktail Conquered the Word" and owner of the Washington DC, cocktail bar Columbia Room, has invited people to share whatever ingredients they have at home and he will dish out a quarantine recipe



[Zachary Kussin](#)
March 17, 2020 New York Post

The New On Line Bar

Brew Dog are hosting On Line Bar Sessions running live beer tastings, homebrew master classes, music and comedy.

They have launched 102 bars in the UK and plan on rolling these out across the US, UK and Germany.



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#5 The New Social

Netflix Night In

Netflix are hosting Virtual Viewing Parties

With over a million downloads, it's seen a jump in users since lock down.

They have a chat window which lets participants discuss what they are watching and share banter.

Cleverly, Netflix are localising the consumer experience by hooking up with local talent.

Irish Comedian Alison Spittle has created Covideo Partys online, inviting people to come together on Twitter, watch movies and share comments together





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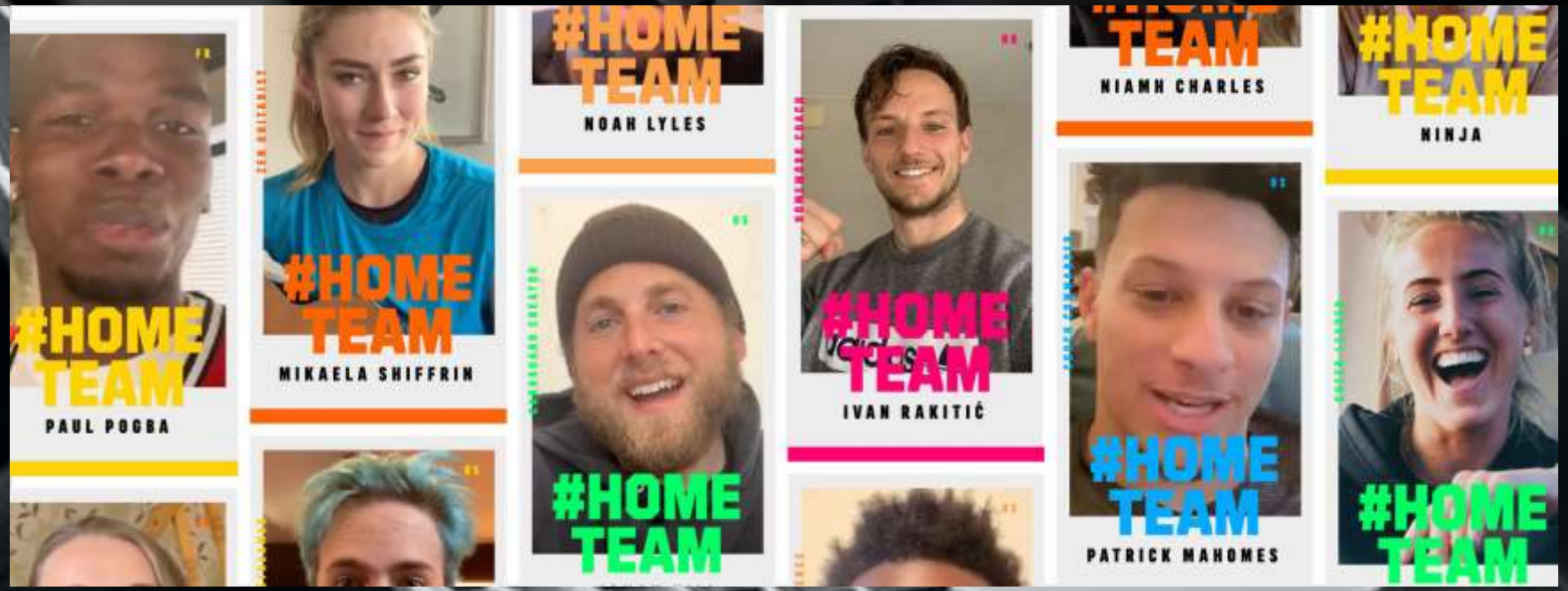
#5 The New Social

Hometeam Healthy..

Online Social is not just about partying but bringing people together through fitness and wellness. Brands like Nike and Adidas have been making their premium online workouts free, but also they are creating platforms that encourage people to connect and engage together online to share progress.



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#5 The New Social

Hometeam Healthy..for the family

Joe Wicks PE virtual classes have become part of the daily school curriculum for many children across Ireland, the UK and beyond. On day one 806,000 households streamed his class. Day Two had 954,000 livestreams. 3.7 million people watched the first video within two days. Kids are invited to tweet in and participate. All profits are going to the NHS.

Love in the time of Corona

And yes even dating on line has taken off. A virtual matchmaking project has been set up by two room mates in Brooklyn in New York. Love is Quarantine is an online dating project conducted through Instagram and Google Sheets. This is based on the hit reality series *Love is Blind* and is busy setting people up on blind virtual dates.

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#5 The New Social

Democratised Creativity

Brands AND Consumers are getting more and more creative as the move to an online always on world emerges.

The United Nations and the World Health Organisation have issued a global open brief to creatives to design informative artworks that spread public health messages to “everyone, everywhere”. The campaign calls for content spanning different languages, cultures, communities and platforms, and covering key areas of activation – such as personal hygiene, social distancing and Covid-19 symptoms. To maximise accessibility and shareability, entrants can produce video, graphics and audio formats. We may be entering and era of Democratised Creativity – anyone can get creative online….







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#5 The New Social

It’s Chipotle A Clock Time

Chipotle have recently partnered with Zoom to create virtual lunch time gatherings. Partnering with Zoom, the campaign is running daily and can host up to 3,000 fans. The gatherings involve celebrity appearances who entertain the online audience with bespoke engaging content.

During these sessions, Chipotle are giving out vouchers to selected participants and offering free deliveries with orders of over $10 dollars or more via their website or app.

Not alone does this campaign provide a real opportunity to connect people but it presents a real commercial opportunity for Chipotle.

Kantar Worldpanel estimate 503 million more in-home meals will be eaten per week during this lockdown period – that’s a rise of 38%.

Lunch is likely to see the most significant change according to Kantar as more than half of all lunches (54%) were eaten out-of-home prior to the lockdown.



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#5 The New Social

Is this new social sticky?

People are likely to find that some of these new online platforms allow people to win back time, open up their world and connect with many new and different people while potentially spending less money too.

Bord Bia's Consumer Lifestyle Trends work identified the Engaging Experiences trend as one that allows the consumer to be front and centre - with brands taking a back drop.

This New Social we are all experiencing is really all about the consumer moving front and centre of the digital space; consumers are sharing more, reading more, listening more, playing more and communication more on social media (and new forms of social media than ever before).

The Digital Natives are coming of age. And some of those consumer who may be that little bit older are finally catching-up. The New Social may well be the stickiest behavioural change of all as people who never embraced digital begin to out of necessity. This will have profound implications for marketing….

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
March 30th

#5 The New Social.

Consumers are embracing technology to fight social distancing.

Implications for Food and 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'**

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Photo by Sergey Zolkin on Unsplash



Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 14th

#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.

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#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 is often manifest 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

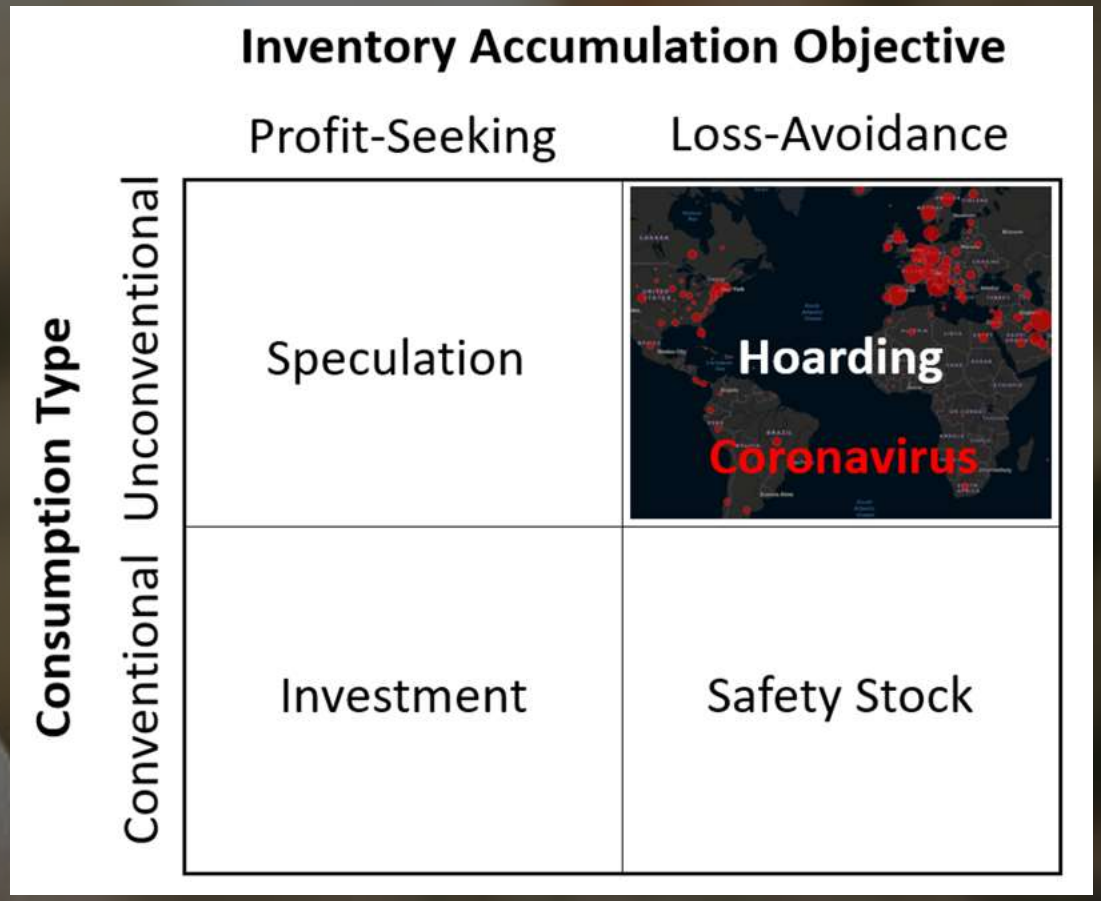
Phase 1 - Hoarding

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

Phase 2 - Transitional Stockpiling

Once panic subsides and as cupboards fill up with shelf stable produce, peoples purchasing habits appeared to move on to the purchasing of frozen products, again according to Nielsen as shoppers began to prepare for the 'lockdown' by filling their freezers – pre-lockdown saw sales of frozen food increase by 84%. Likewise with the closing of bars and food service restaurants the sales of alcohol rose with sales up 67% over this time last year (Nielsen). Panic buying pretty quickly moves into a preparedness phase…

33%

of Spanish adults are stocking up on essential food and drink for their homes more now as a result of the Covid-19 response

Source: Bord Bia Tracker

71%

of Spanish adults are minimising their trips to the shop as a result of the Covid-19 response

Source: Bord Bia Tracker

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#6 Stocking In

So is “Panic Buying” a misnomer?

David Savage, associate professor of behavioural and microeconomics at the University of Newcastle in Australia, argues that stockpiling is actually a pretty RATIONAL consumer behaviour. “If we understand panic as a state of uncontrollable fear that drives irrational behaviour, then how people usually respond in the face of disaster is something else entirely”, Savage argues. “It’s a common belief that social law breaks down in a disaster. In the Hollywood version, chaos ensues and people act in illogical or unreasonable ways. The reality is very different.”

Most research rejects the notion of a “disaster syndrome” described as a state of stunned shock or the occurrence of mass panic. In real disasters, people usually hold on to tenets of acceptable behaviour such as morality, loyalty, and respect for law and customs.

The reality of the current pandemic is that people and shoppers understand that Covid-19 has a 14 day incubation period. So doesn’t isn’t it entirely reasonable to be ***prepared*** for period of self-isolation at home?

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#6 Stocking-In

Phase 3 – Creative Compromises.

Far from becoming a burden or compromise for consumers, there is some evidence that people are looking on the positives of living from the Pandemic Pantry.

We are seeing a lot across various social media platforms of cooking with tinned and shelf stabled foods. For example, well known Brooklyn Chef Chitra Agrawi talks about always having a pantry that's filled with dried beans and lentils for making dal. These are her new "go to" foods and are gaining a following online.

Beautiful tinned food pictures are appearing across various social media channels and, in a sense, consumers are beginning to celebrate their new found adoption of what was a relatively old-fashioned format. One could argue that public displays of one's 'clever use' of tinned foods feeds into a behavioural phenomenon known as 'the illusion of control'. For now, at least, **Pandemic Pantries are now at the heart of the Cultural Zeitgeist.**



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#6 Stocking-In

Phase 3 – Creative Compromises.

In Australia the Chef Jane De Graff was set the challenge of cooking 4 meals with no fresh ingredients whatsoever on Australia's Today Show.

Similarly in the UK, Jamie Oliver has launched a new show – Keep Cooking And Carry On. The idea behind this show is to encourage us to embrace a new-world of cooking where cupboard stables can be turned into interesting and exciting new recipes.

The appeal of these initiatives could be explained by "Decision Fatigue". Pre-pandemic shoppers enjoyed a world of 'Over Choice' and there is a significant body of evidence to suggest that Over Choice is associated with unhappiness. Today we are seeing shoppers actually enjoy cooking with scare resources…



Jane de Graaff shows Today Show hot to cook with tinned food (Nine)

https://kitchen.nine.com.au/

Jamie Oliver GET INSPIRED

KEEP COOKING AND CARRY ON

You've told me what you need, and I've listened. In my new show, I'm sharing my easy-to-follow, super-flexible recipes with lots of useful swaps and tips to help you feed yourself and your loved ones in these unique times. Let's celebrate freezer faves, big up the store cupboard and get creative with whatever we have to hand. Let's keep cooking and carry on!

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#6 Stocking In

Will Stocking-In Stick?

One could be forgiven for thinking stockpiling, hoarding and the other behaviours associated with this phenomenon are transient and merely shaped by the constraints the pandemic has placed on us. For clues as to whether this behaviour will stick we could look to China – where consumers are now coming out of lockdown. According to Nielsen 86% of Chinese are saying they would eat at home more often than before the outbreak.

However, to surmise that 'cooking at home more often' is evidence of a 'sticky' behaviour around stockpiling is to over simply matters. The reality is stockpiling behaviour is a complex phenomenon based around shopper reactions to scarcity, choice, control deprivation and decision fatigue. These behaviours could unlock 'nudges' around changing shopper missions that retailers and producers can tap-into.

We will be watching how shopper behaviour evolves in the coming months to truly understand if some of these Stocking-In behaviours actually are here for good…

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 14th

#6 Stocking In.

How grocery shopping evolves from panic to preparedness.

Early Implications for Irish Food and Beverage:

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

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Image by Steve Buissinne from Pixabay

Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 15th

#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 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

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

The rise of **“NO TOUCH RETAIL”** has important implications for retailers and food producers, in particular in sectors like bakery, fresh produce and fresh meats. It has big implications for packaging – an already vexed question for retailers, consumers and producers. And it is also worth considering the impact on product sampling and promotion among other aspects of the shopping experience.

We’re calling this indicator RISKY BUSINESS.



86%

of Spanish adults wear gloves when doing grocery shopping for their household all or most of the time as a result of Covid-19

Source: Bord Bia Tracker

88%

of Spanish adults wear a mask when doing grocery shopping for their household all or most of the time as a result of Covid-19

Source: Bord Bia Tracker

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#7 RISKY BUSINESS

What is the risk?

At the outset of the crisis here in Ireland the Behavioural Research Unit at the ESRI identified seven issues worth considering in 'fighting the coronavirus'. Number seven on that list was RISK PERCEPTIONS. And its to risk perceptions we turn to explain what we mean by RISKY BUSINESS.

Perceptions of risk are easily biased. Overstating or understating a risk can result in people making choices that have a negative outcome. That's because perceptions of risk DOES drive behaviour. People judge the likelihood of an outcome partly by how easily it springs to mind; this is an **availability heuristic**, also known as **availability bias**, it is a mental shortcut that relies on immediate examples that come to a given person's mind when evaluating a specific topic.

Today in the midst of the pandemic shoppers 'risk assessments' are heightened. Is there evidence that Covid-19 will survive on a baguette or loaf of bread on display in a store? Possibly not. But because of the availability heuristic – shoppers defer to an outcome that does spring to mind: "I've heard the virus can last 24 hours on door handles", "I've been told to wash the wrapping on my shopping when I get home". The closest available evidence would suggest its better to be safe than sorry.

Shoppers have been told to mitigate risk by washing their hands. They've been told not to wear face masks, then possibly that they should wear face masks. They've been told to mitigate the risks. Food, on display out in the open, always something that needed careful handling, now needs even more careful handling…

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#7 RISKY BUSINESS

Tackling the concerns

In response, Supervalu stores in Ireland have been highlighting their “wrapped in store” assurance at their bakery section. But it’s not just bakery. With the NHS recommending that UK shoppers wash fresh fruit and vegetables, many are opting for packaged options instead.

A Reuters report by Richa Naidu claims that “U.S. shoppers are avoiding touching fresh fruits and vegetables in grocery stores and stocking their pantries with pretzels, powered milk, canned meat and other packaged food”. They observe that at Fairway market in Manhattan’s Upper West Side, shelves normally filled with prewashed lettuce sold in plastic containers were bare on Sunday morning. By contrast, there was plenty of loose lettuce for purchase.

This phenomenon has prompted producers groups to reassure shoppers that it is safe to buy fresh produce. One such initiative was launched by United Produce including a dedicated website (here).

The National Grocers Association which represents over 8,000 stores in the US says its members are packaging bakery items that are usually loose in bins, such as fresh doughnuts and pastries (CNBC).

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#7 RISKY BUSINESS

The Safety v Sustainability Conundrum

With sustainability and packaging playing an increasing role in consumer's choices, RISKY BUSINESS introduces an unwelcome element to the food chain mix – **MORE PACKAGING & MORE WASTE**. As recently as September 2019 Globaldata research showed that 71.4% of consumers said they consider the environmental impacts of their choice. Now, their fears and risk-mitigation, will see many consumers having to embrace something none of them want to.

The move to **NO-TOUCH** retail presents an interesting conundrum in this regard and a challenge of brands in affected sectors who want to behave sustainably. This will be a tension that will have to be resolved for the future if this phenomenon sticks. And RISKY BUSINESS feels like one indicator that could STICK:

> "On the other side of this [crisis], are people going to be a lot more careful? The answer is yes. Are people's radar for hygiene going to be more heightened? The answer is yes. Are we going to recognize that being prepared for stuff like this is eminently more important, and that we need a renewed focuson people keeping healthy? Yes."
>
> - PACO UNDERHILL*

Source: * https://www.uschamber.com/co/good-company/launch-pad/coronavirus-and-hygiene-affect-sales-techniques

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
March 31st

#7 Risky Business.

Shoppers are shying away from produce on open display and touchable

Implications for Food and 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**

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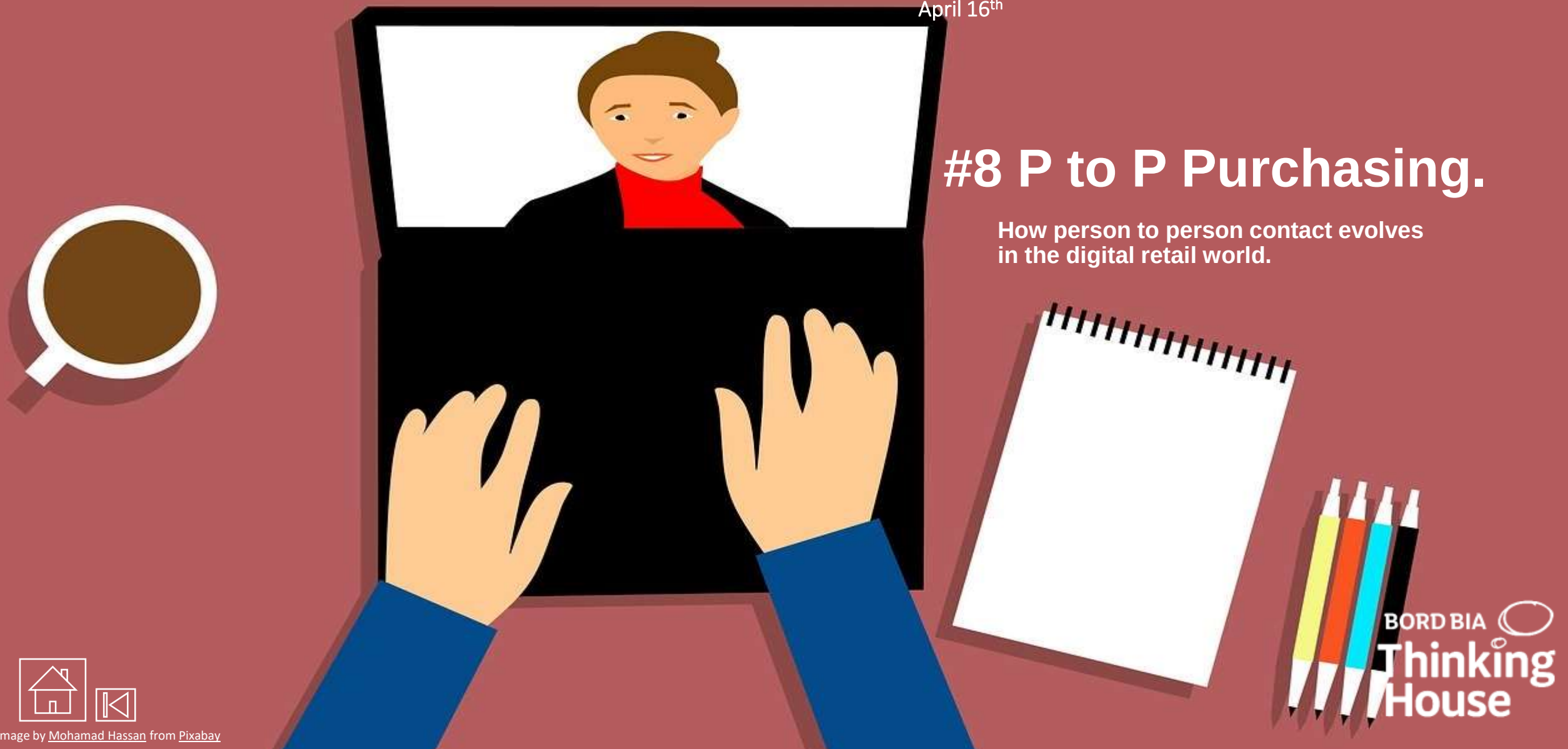
Photo by Kate Remmer on Unsplash

Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 16th



#8 P to P Purchasing.

How person to person contact evolves in the digital retail world.

BORD BIA Thinking House

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 scrutinized 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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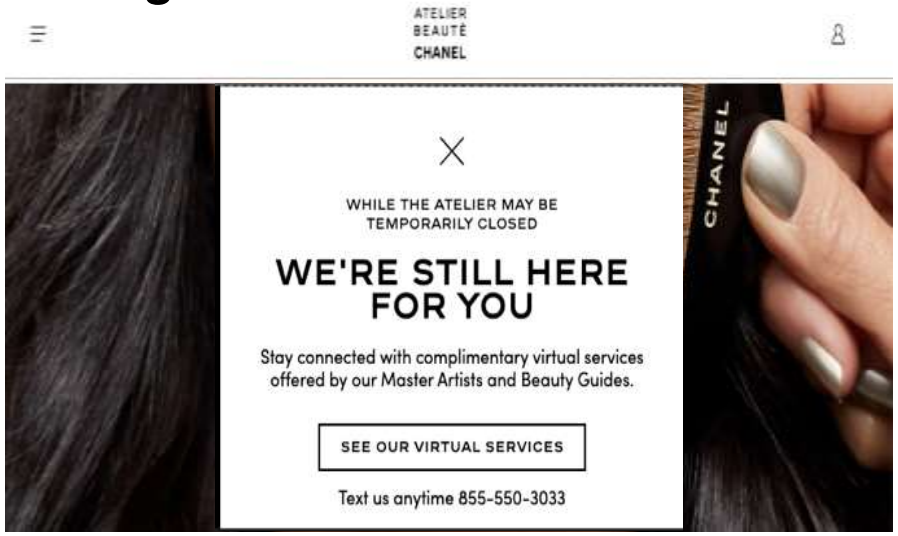
#8 P to P Purchasing.

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 skincare routine chats for $18.00. A clever way to win new customers and 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 ecommerce 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, 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.

Time for the direct to consumer model to come of age?

Direct to Consumer (DTC) selling allows brands to develop a deeper relationship with consumers and potentially entrench brand loyalty.

Many DTC manufacturers are also mastering their service via quick personalized responses to questions and providing empathy for consumers' needs and concerns.

In a recent Nielsen survey on tech-transformed consumption, four in 10 global online consumers said they were already using online shopping subscriptions, and a further 36% said they were willing to do so in the next two years.

Adoption of subscription services over the course of the Covid-19 crisis will be an indicator that changes to existing consumer shopping habits are emerging.



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#8 P to P Purchasing.

Time to replicate the physical world online?

Nielsen survey data shows that globally, consumers still have a strong affinity with in-store shopping, with 59% saying they agree or strongly agree with the statement: “I really enjoy doing the grocery household shopping.”

But as COVID-19 cases rise daily around the world, many consumers are waking up to self-imposed isolation and quarantine situations where a trip to the store is no longer possible or fraught with challenges.

In in this new world artificial and virtual reality (A/VR) technology has the potential to bring the in-store experience into their homes.

In South Korea online food purchases are up 92.5% compared to the same period last year. And in a world where hygiene is a concern A/VR has tackled consumer concerns.

41%

of Spanish adults are doing their grocery shopping online more often a result of Covid-19

Source: Bord Bia Tracker

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#8 P to P Purchasing.

Time to replicate the physical world online?

Interpark, one of South Korea's major online shopping malls, introduced its own AI shopping consultant dubbed Talk Butler last year after 30 months of research and development.



Using big data, Talk Butler is able to answer questions from customers within five minutes. Upon receiving requests, Talk Butler can recommend items or offer deals after analyzing questions and customer needs.

When customers inquire about the lowest price for an item, Talk Butler will gather information and find the cheapest way to purchase the item using coupons or suggesting ways to lower the purchase price.

Another mall, 11 Street, was the latest to join the move towards AI in the shopping industry with the introduction of its new chatbot Baro last month. The deep learning technology implemented by 11 Street allows Baro to go beyond the surface of simple questions like "recommend the best refrigerator for me".

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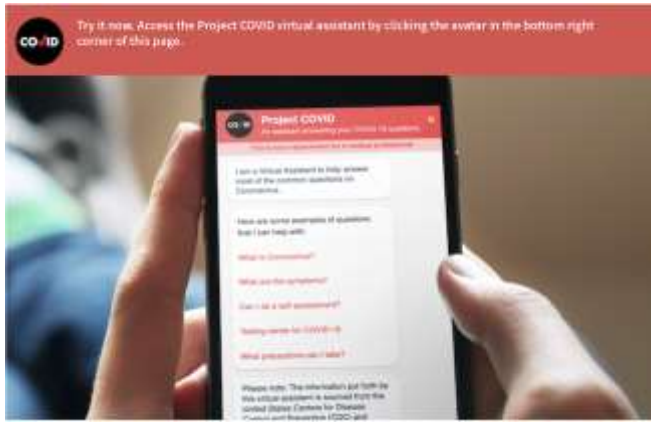
#8 P to Bot Communication.

The world of AI is already being embraced in an effort to fight Covid misinformation

Project COVID uses Conversational AI to have a conversation with millions of pages of information from the CDC, NIH (National Institutes of Health), and WHO to quickly get answers conversationally.



The first objective of Project COVID was to make a publicly accessible and interactive coronavirus virtual assistant that leverages Avaamo's fundamental AI and deep learning technologies.

The information ingested by the Avaamo engine and used to train this virtual assistant has been carefully selected only from authoritative sources.

This assistant is not a replacement for a medical professional. But the user experience relies completely on the principles of **Authority Bias**.

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#8 P to Bot Communication.

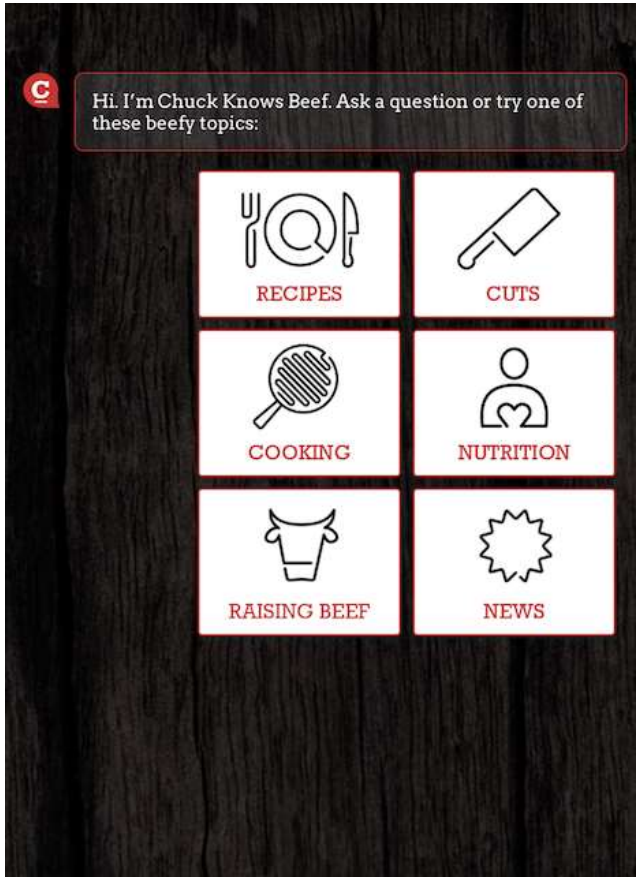
And AI has already been embraced to deliver a virtual butcher for consumers

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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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
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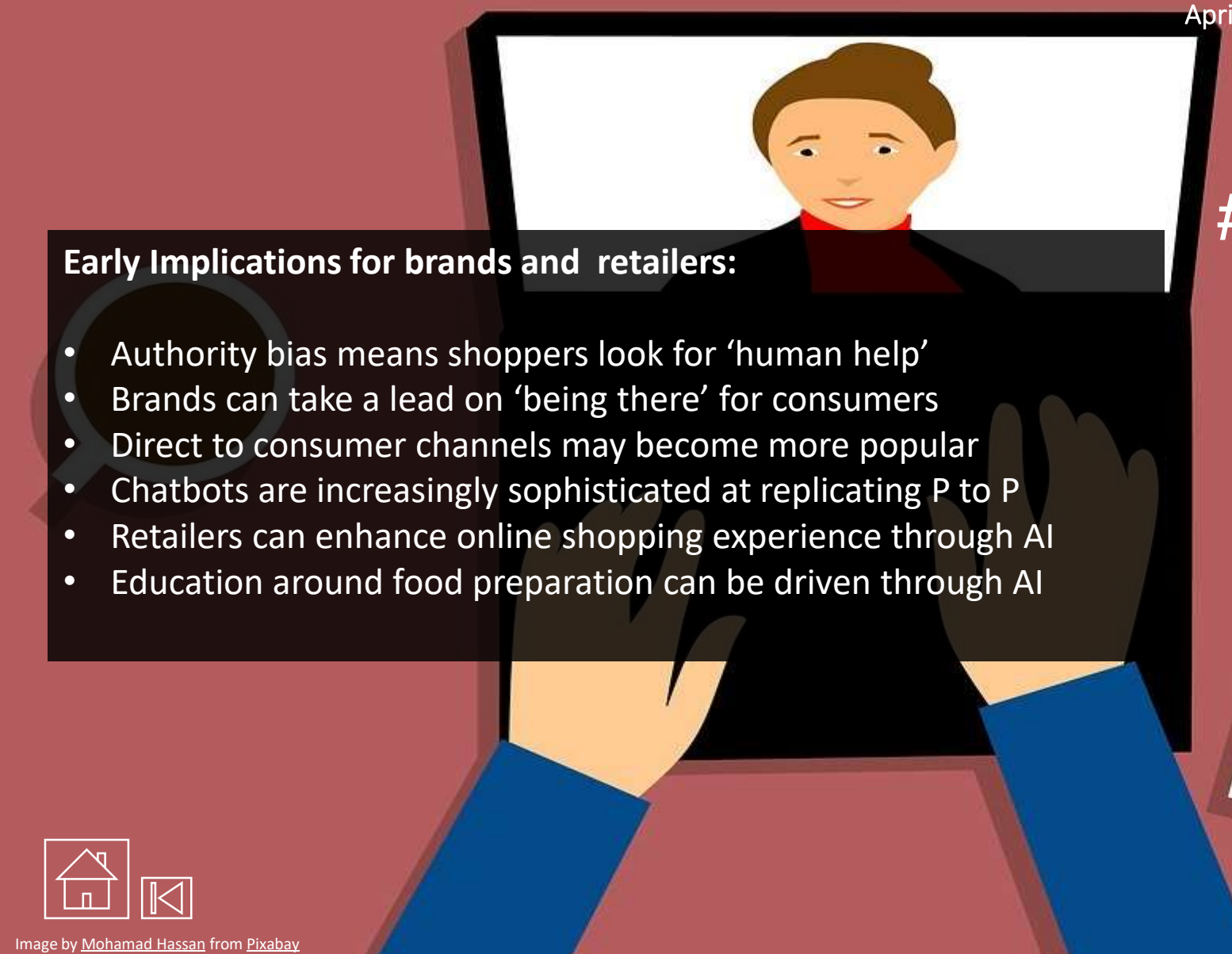
#9 P to P Purchasing.

How person to person contact evolves in the digital retail world.



Early Implications for brands and 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

Early clues on the post-crisis consumer & market realities
April 17th

#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 the 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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#9 Proxy Purchasing.

Agency shopping demands a list

When the history of the crisis is written there will be a chapter devoted to the **The Agency Shopper**.

Yes our healthcare workers, doctors and nurses deserve the plaudits they've been getting. But as we know, not all heroes wear capes, the real heroes of the crisis are those who are bravely venturing into the jungle of a social distanced supermarket on behalf of those who are cocooning.

The risks these brave folk are taking on are very real. Not only do they have to contend with the stress of social-distanced queues outside supermarkets and the game of chicken with other shoppers inside stores, they also have to cope with the consequences of their choices.

Shopping for ones own household is fraught enough. Shopping for a parent or cocooning neighbour is a whole other level. You would be forgiven for thinking 'stick to the list stupid' is the answer. But things are never quite that simple…

33%

of Spanish adults are shopping for an older friend or family member more often as a result of Covid-19

Source: Bord Bia Tracker



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#9 Proxy Purchasing.

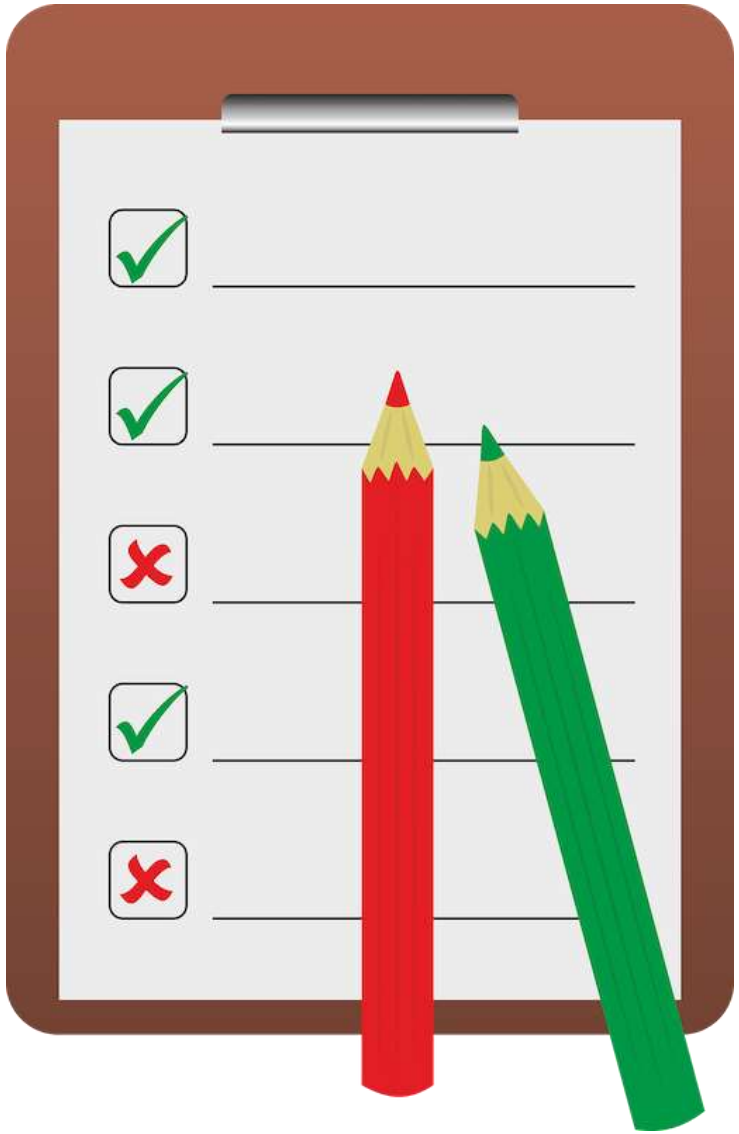
The science of the shopping list

While designations like milk, bread, and eggs are no doubt common on grocery-shopping lists, how common are specific brand names?

According to a recent study by Field Agent, 76% of US shoppers said they include general product names on their lists, while 34% said they actually include specific brand names**.**

Critically 44% of shoppers claim to spend less when using a shopping less and a further 38% of shoppers claim to spend neither more nor less.

And there we get to the heart of the shopping list usage. Shopping lists are about control. And staying in control when you are responsible for someone else commands even greater importance. In an environment like a supermarket **Choice Overload** can dramatically impact our behaviour – a list helps keep that under control.



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#8 Proxy Purchasing.

Are impulse buys inevitable?

Various commentators have speculated on the degree of impulse shopping that happens in supermarkets. But data does point to about 20% of purchases in Supermarkets being unplanned.

Professor of Marketing at Wharton, David Bell, has completed extensive research on how impulse shopping varies by shopper mission.

He has found that if the purpose of a shopping trip is “immediate needs or forgotten items,” the rate of buying in unplanned categories falls by 53%. Unplanned purchasing goes up by 23% if the shopping trip itself is unplanned, but it goes down by 13% if it’s a major or weekly trip.

Unfortunately what we can’t say, right now, is what happens to impulse purchasing when shopper for other people in the middle of the global pandemic! At least not yet anyway…



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#8 Proxy Purchasing.

Are impulse buys inevitable?

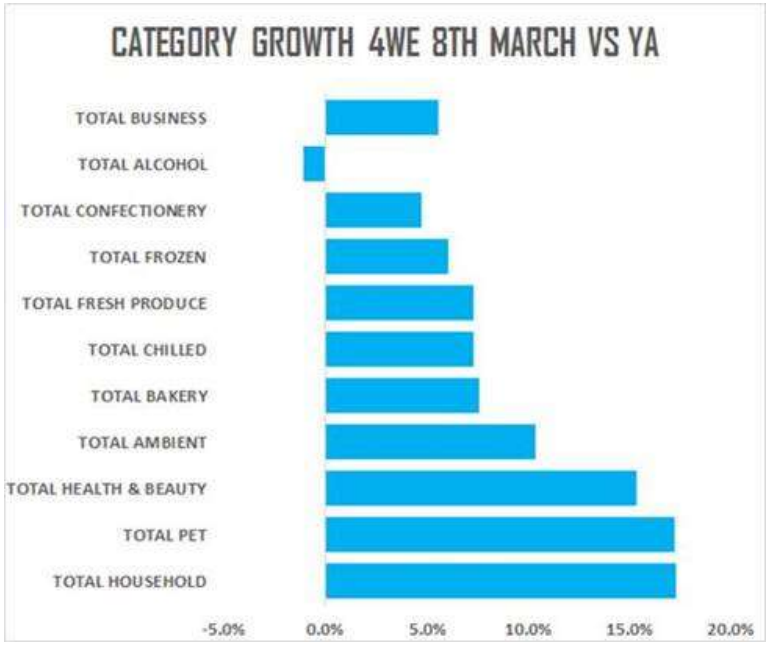
Even though we may not think it all the time, we are by and large very optimistic people and perhaps even more so when spending money.

We are convinced that we will eat all the food we buy, wear every item of clothing, and use all the household items we pick up. It doesn't really matter if we are told that this may not happen; we still go ahead and buy – optimistically.

This phenomenon is known as **Biased Estimation of Use**.

So as those of us go shopping for our cocooners its not implausible to pre-suppose that there may well be some 'over-estimation' of food purchases; an 'it won't go to waste' effect if you will.

And what's more, this particular bias can feel great…



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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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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 17th

#9 Proxy Purchasing.

How shopping for the cocooned changes our behaviour.

Early Implications for brands and retailers:

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



Image by Jesse Yelin from Pexels

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 20th

#10 Mood Food.

How we are choosing food that make us feel good

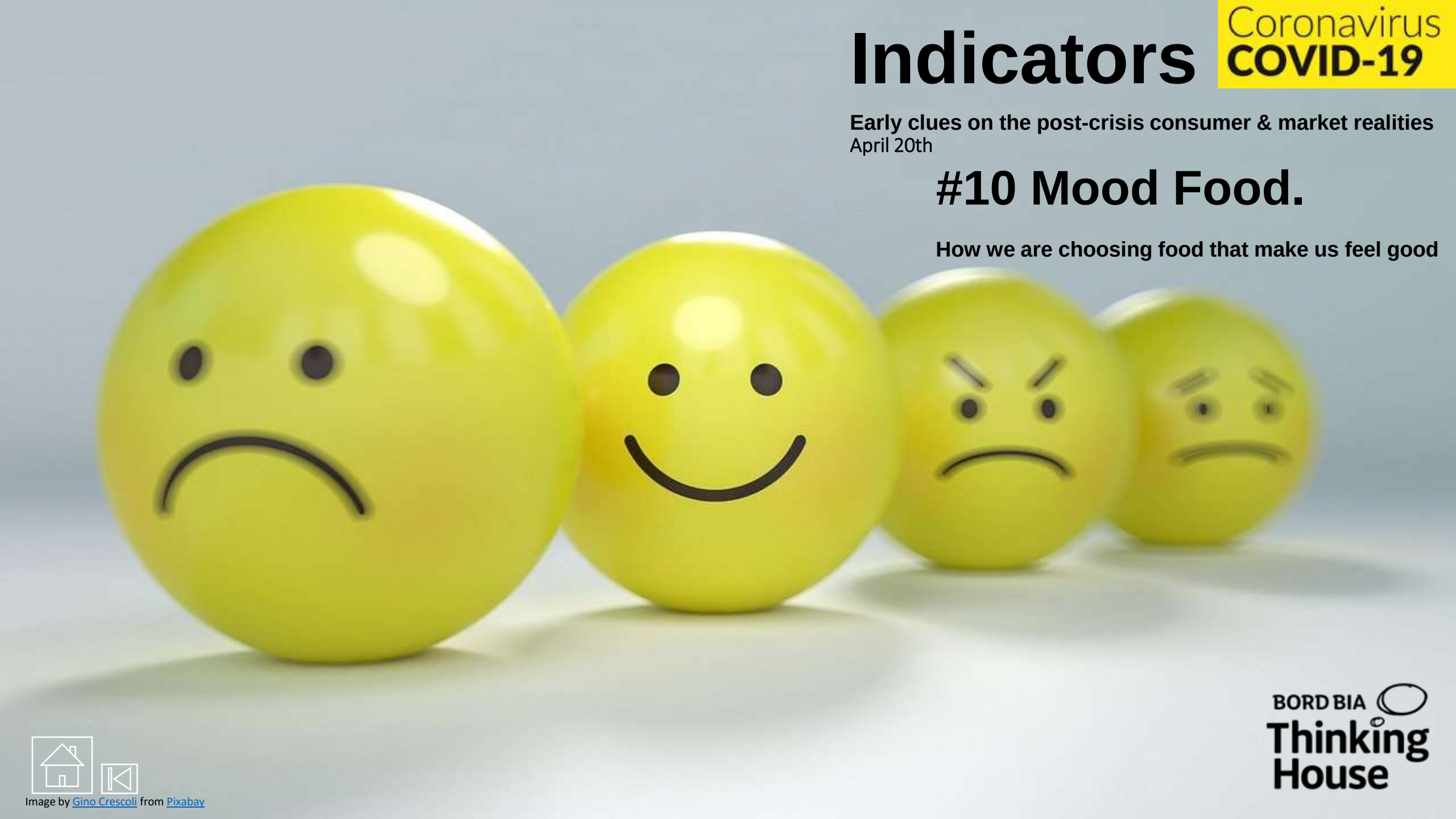

Image by Gino Crescoli from Pixabay

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#10 Mood Food.

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 to 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 a 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…

36%

of Spanish adults are learning to cook from recipes as a result of Covid 19.

Source: Bord Bia Indicators Barometor

39%

of Spanish adults are scratch cooking more as a result of Covid 19.

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#10 Mood Food.

If Mohammad won't go to the mountain…

…home delivery is bringing the exotic to people's homes. Hyperbolic Discounting refers to the tendency for people to increasingly choose a smaller-sooner reward over a larger-later reward as the delay occurs sooner rather than later in time. Recreating your holiday food through delivery of that cuisine is the quickest way to reward yourself for that missed trip.

The home delivery picture varies depending upon where you live. In France, Spain and the UK, Just Eat and Uber Eats saw drops in average daily users ranging from 2% to as much as 23% in March, compared with the averages for January and February.

However, in the US, as people are unable to dine out in their favourite restaurants, delivery and meal kit businesses have seen a surge in sales. HelloFresh said it's expecting first-quarter sales of between 685 million euros ($750 million) and $710 million euros, up from $420 million euros a year earlier. (Washington Post, April 1st 2020).

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#10 Mood Food.

A little luxury

What does appear to be a real phenomenon is the endurance of ‘high-end’ experiences being maintained for those with the spending power. There is a split between consumers when it comes to spending power so far – with estimates suggesting just under half of most workforces around the world already experiencing a drop income.

For those who haven’t yet felt the pinch, **Hyperbolic Discounting**, can see spending on food delivery shift to recreating fine-dining at home. Even Michelin star restaurants are reinventing themselves to target those consumers who ‘can’t wait’ for their favourite fine dining experience so attempt to ‘replicate it themselves’ at-home.

There are lots of examples of the high-end players moving into delivery. For example, a Michelin star restaurant in Dublin Liath launched a take away menu for €19 euros and sold out in minutes (Irish Times, March 2020). These kind of behaviours are being replicated in major urban-centres around the world.

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#10 Mood Food.

Treats time

Treating ourselves has become a key behaviour for many consumers getting themselves through the long days of lockdown.

Hedonic consumption focuses on consumer behaviour which seeks sensory pleasures or hedonistic benefits and can go a long way to explaining treating behaviour.

As more of us are working from home, normal routines are out the window and with the ability to pop into the kitchen for a sugar hit.

And relatedly **boredom** has been proven to driver hedonic consumption and, in turn, snacking behaviour.

29%

of Spanish adults are having sweet treats and snack food as a result of Covid 19.

Source: Bord Bia Indicators Barometor

33%

of Spanish adults are snacking more outside of mealtimes as a result of Covid 19.

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#10 Mood Food.

Treating and self control

Self-Control Bias shows us that as many individuals have a preference for immediate consumption, individuals may struggle to sacrifice consumption for future reward. There is evidence that lockdown is having a serious knock-on effect on consumers' ability to 'hold-off' on what once may have been a once a week treat.

As people get through another day, there is often a "back clap" to oneself or the family that everyone has survived. Food and drink indulgence is the order of the day for many with the hashtag #fattening the curve seeing many people post stories of their over indulgence.



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#10 Mood Food.

Treating and self control

An example is **The Quarantini**, a zeitgeist cocktail that emerged the second week in March, has had over 25,000 Instagram posts by the end of March. US sales of alcohol in the off-trade rose 55% in the week ending 21st March, according to Nielsen with spirits like Tequila, gin and pre-mixed cocktails leading the way with sales up 75% compared to the same period last year.



13%

of Spanish adults are drinking more alcohol during the week as a result of Covid 19

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#10 Mood Food.

In favour of fresh.

While treats are a key part of mood food, at the other end of the spectrum, the need to eat well is being much documented during the Covid 19 lockdown. Eating well can help “improve the mood” and stave off stress and fresh fruit and vegetables play a role here. **Myopia Bias** can go some way to explaining this behaviour.

Myopia Bias refers to the tendency for individuals to focus on the present or immediate rather than the near or far future. As we discussed in our STOCKING-IN Indicator, consumers are going to different stages of stocking up. A focus on the ‘here and now’ (Myopia Bias) may well explain at least partially when consumers move into a ‘fresh food’ phase.

Much is also being made by nutritionists of good food and the role of good food in boosting immunity. It’s interesting to note that 89% per cent of Chinese mainland consumers say they will be more willing to buy daily necessities/fresh products online once the pandemic is over (Nielsen 2020).

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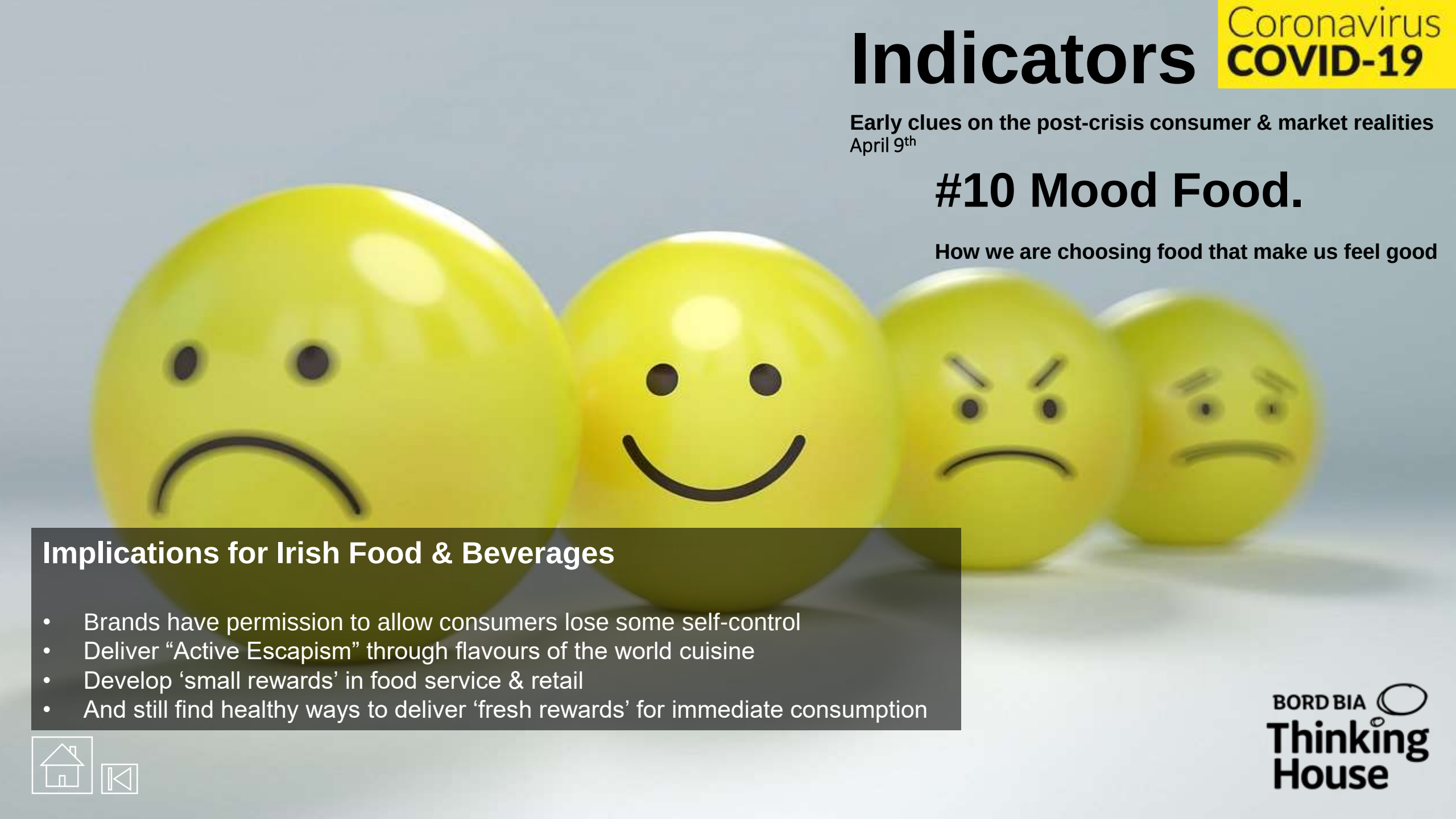
Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 9th

#10 Mood Food.

How we are choosing food that make us feel good



Implications for Irish Food & Beverages

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

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 21th

#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 spend 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.

We know from our very first indicator – **Shielding** – that consumers are increasingly concerned with immunity and are adopting foods that help protect their health.

According to Behaviour and Attitudes (Food Purchase Survey) over one third of consumers have been purchasing ‘more nutritious foods’ since the outbreak of Covid-19.

Equally, parents have been encouraging children to embrace hand hygiene. The Happy Handwashing Song has over 5 million views, while in Hanoi they have created a hand-wash dance challenge which has racked up more than 2 million views on Tik-Tok.

32%

of Spanish adults are eating healthier for improved immunity as a result of Covid-19.

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#11 Smaller World.

The Baking Bandwagon

The **bandwagon effect** is a phenomenon whereby the rate of uptake of beliefs, ideas, fads and trends increases the more that they have already been adopted by others. A prime example of a bandwagon effect in action during lockdown has been been parents baking with their kids.

With 48% of Irish parents very concerned about the impact of their children's education as a result of Covid 19, they are looking for new ways to engage them and baking lends itself as a way to learn whilst having fun.

Banana bread is the number one favourite to bake for now, tipping over 1.4 million instagram posts. In Ireland according to Google Trends, searches for banana bread went up 77% in one month, and 54% worldwide, resulting in a recent piquant quote on Twitter: "Is Covid-19 sponsored by banana bread?"

71%

of Spanish parents are having more quality time with their families now as a result of Covid 19

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#11 Smaller World.

Broken Habits

Habit is an automatic and rigid pattern of behaviour in specific situations, which is usually acquired through repetition and develops through associative learning. For children, some pretty fundamental consumption habits have been completely disrupted.

Lunch during lock down has is a dramatic shift from the norm. **Status Quo Bias** is evident when people prefer things to stay the same by doing nothing - in the lockdown world the status quo of kids lunchboxes has disappeared. With 54% of lunches eaten out of home prior to lock down (Kantar World Panel), half the population are being confronted with a whole new lunchtime.

Myopic Bias is the tendency to focus on the present or immediate rather than the near or far future. In the world of lockdowns this means parents can give in to whims of pester power.

This focus on the here and now means often looking in the fridge and just working with what's there, but also allows children to experiment with lunches that are less typical to school from beans on toast to scrambled egg, to making sandwiches perhaps using left overs from last nights dinner.

BORD BIA Thinking House

#11 Smaller World.

Mitigating Against Broken Habits

The downside of this disruption to kids Habits is a potential over-consumption of treats. The focus on the here and now, **Myopic Bias**, plays hand-in-hand with a phenomenon knows as **Mindless Eating**.

The expression “Mindless Eating” has been coined by the eating behaviour expert Brian Wansink. It refers to the finding that various cues associated with food non-consciously affect the amount and quality of people’s consumption. Cues often serve as benchmarks in the environment. Cues may include serving containers, packaging, people, labels and atmospheric factors.

Children are only human, believe it or not. They are just as attracted to the colourful packaging of sweet treats in the kitchen as the rest of us. Their disrupted routines only exacerbates mindless eating for amongst children and parents are finding treats a quick way to “keep the peace” at-home. Some 30% of Irish parents are having more periods of family discord or tension now as a result of Covid-19 (BBIB).

One strategy parents may be adopting to mitigate against mindless eating is **Partitioning**. This is the behavioural science insight that underpins ‘funsize’ treats. Partitioning, in theory at least, reveals that rate of consumption can be decreased by physically partitioning food into smaller units e.g. cookies wrapped.

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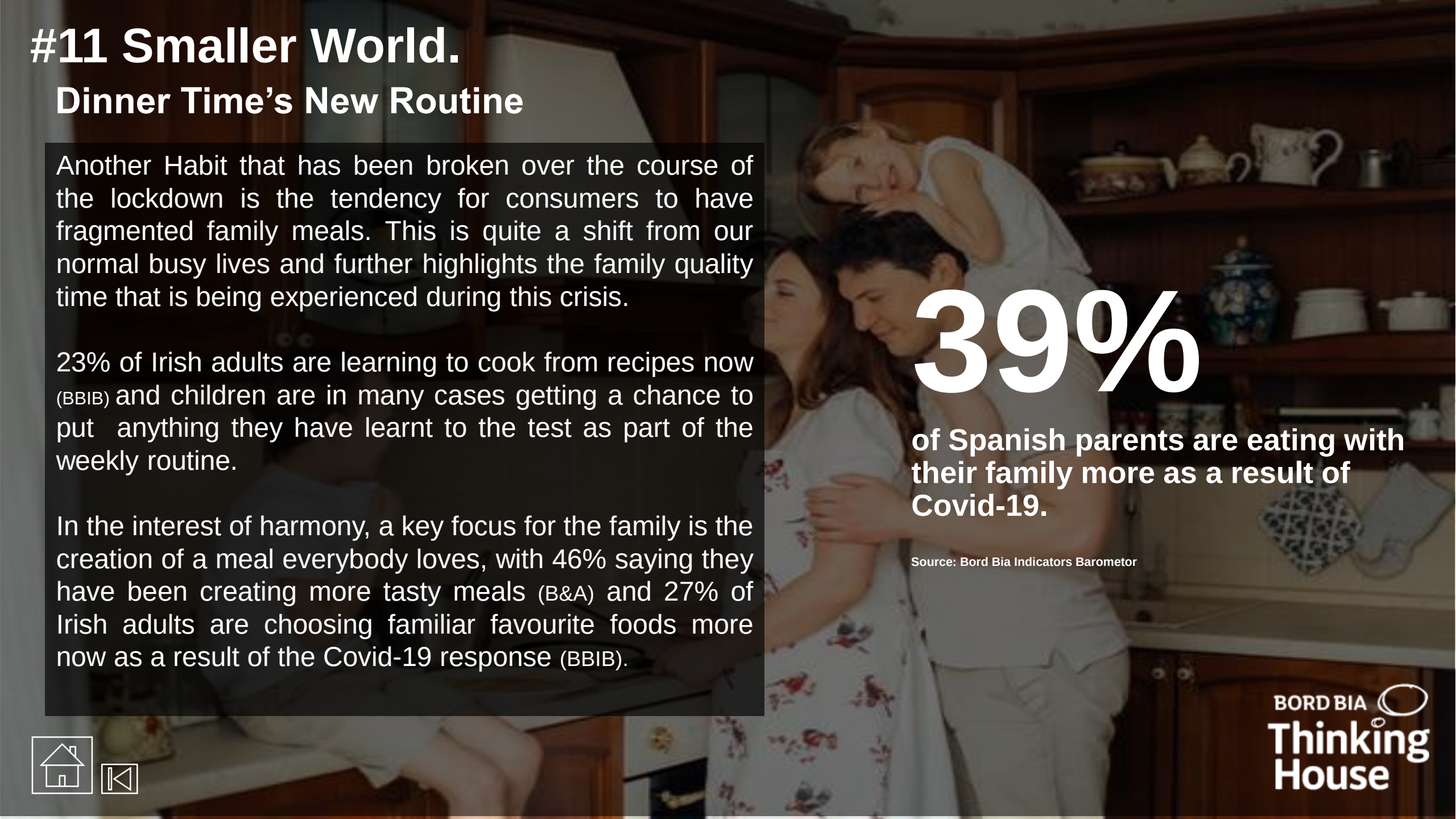
#11 Smaller World.

Dinner Time's New Routine

Another Habit that has been broken over the course of the lockdown is the tendency for consumers to have fragmented family meals. This is quite a shift from our normal busy lives and further highlights the family quality time that is being experienced during this crisis.

23% of Irish adults are learning to cook from recipes now (BBIB) and children are in many cases getting a chance to put anything they have learnt to the test as part of the weekly routine.

In the interest of harmony, a key focus for the family is the creation of a meal everybody loves, with 46% saying they have been creating more tasty meals (B&A) and 27% of Irish adults are choosing familiar favourite foods more now as a result of the Covid-19 response (BBIB).



39%

of Spanish parents are eating with their family more as a result of Covid-19.

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#11 Smaller World.

New Routines For Breakfast

With the morning commute on-hold, the typical rush hour in the morning is now out of the way. So, presumably, we are all taking more time over breakfast?

While sales of cereal surged with **Stockpiling** in March, as we move through the crisis in the interest of avoiding ground hog day, we are may see more creativity over breakfast to keep the little people engaged.

Pandemic Pancakes are trending; another Bandwagon Effect.

Perhaps the more ‘hidden’ behaviour to watch at this occasion will be around **Shielding** and how consumers attempt to protect their families. Immunity boosting foods from probiotics to vitamin c enhanced foods for family may become more of a feature over time.

47%

of Spanish under 35-year olds are now eating healthier for improved immunity as a result of Covid 19

Source: Bord Bia Indicators Barometor

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 21th

#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

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 22nd

#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 are 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 how 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….

Food waste & intention

It would appear that one of the biggest shifts in behaviour around food waste centres on **INTENTION**. 75% of Irish consumers reducing their trips to the supermarket, the need to do this and make food go further is clear.

Some 54% of Irish shoppers claim this behaviour of ‘minimising’ trips to the supermarket is happening more often now. And of those 40% think its is likely to continue into the future.

With the need to reduce trips to the supermarkets, it is even more pertinent that consumers make their food go further.

There are numerous resources dedicated to helping us reduce our food waste during the Coronavirus “lock down”, with guidance ranging from the use of broccoli stems in cooking and making chips from vegetable peel through to making stock, reviving stale bread and freezing leftovers (which we discuss in an earlier “indicator”).

Indeed, banana bread has been making something of a renaissance since the onset of the Coronavirus restrictions as a tasty way to use bananas that are past their best.

71%

of Spanish shoppers have reduced their trips to the supermarket since Covid 19.

Source: Bord Bia Indicators Barometor

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Photo by Joshua Hoehne on Unsplash

#12 WASTE NOT….

Food Waste & Behavioural Control

Another big driver of behaviour is consumers' desire to remain in control. **Illusion of Control** is the belief that we have influence over random events or events in which we are powerless, is an extremely common mental heuristic.

We know from Indicator #6 Stocking-In, that consumers have rationalised the need to have at least 14 days worth of food 'on-standby', a classic 'control' heuristic. But how does having a full pantry square with the need to 'stay in control' of food waste?

Our own research based a national survey of 1,000 consumer in Ireland identifies managing food waste as one of the "stickiest" of all consumer behaviours.

34% are consciously Reducing Food Waste in response to Coronavirus restrictions, with 2 in 3 of these expecting to continue this "waste-less" approach after the restrictions are lifted. This phenomenon is significantly higher among younger cohorts.

On this evidence we are moving into a world where consumers will seek out foods that provide that ability to control waste.

26%

of Spanish adults are consciously reducing food waste as a result of Covid 19.

Source: Bord Bia Indicators Barometor

45%

Spanish adults have started or increased saving for a rainy day in response to Covid-19.

Source: Bord Bia Indicators Barometor

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Photo by Joshua Hoehne on Unsplash

#12 WASTE NOT….

And what about the money?

With 1 in 5 shoppers setting a grocery budget for the first time or doing so more now that Covid-19 has arrived a more frugal mindset is emerging. For half of those who are new to the world of budgeting, they intend to keep up this behaviour when the virus has passed.

The notion of frugality is currently de-rigeur for sure, with Jame Oliver's latest hit "Keep Cooking & Carry On" focussing on low cost cooking.

An National Recruitment Federation survey of people working from home in Ireland due to Covid-19 reported that for 7 in 10 their overall household outgoings had decreased due to the "lock down". Will a more conscious spender emerge from this crisis?

It will take time for consumers to re-assess their value paradigm and settle back to a new normal post-Coronavirus reality when it comes to their spending.

Budgeting is just another aspect of consumers finding ways to stay 'in-control' during this most uncertain of times in all our lives.

BORD BIA Thinking House

Photo by Joshua Hoehne on Unsplash

Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 22nd

#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

BORD BIA Thinking House

Photo by Joshua Hoehne on Unsplash

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

#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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#13 Chameleon Living

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.

BORD BIA Thinking House

#13 Chameleon Living

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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#13 Chameleon Living

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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#13 Chameleon Living

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.

BORD BIA Thinking House

#13 Chameleon Living

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…

29%

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

Source: Bord Bia Indicators Barometor

33%

of Spanish adults are snacking more outside of mealtimes as a result of Covid 19.

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#13 Chameleon Living

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.

13%

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

Source: Bord Bia Indicators Barometor

30%

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

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#13 Chameleon Living

How are we all feeling?

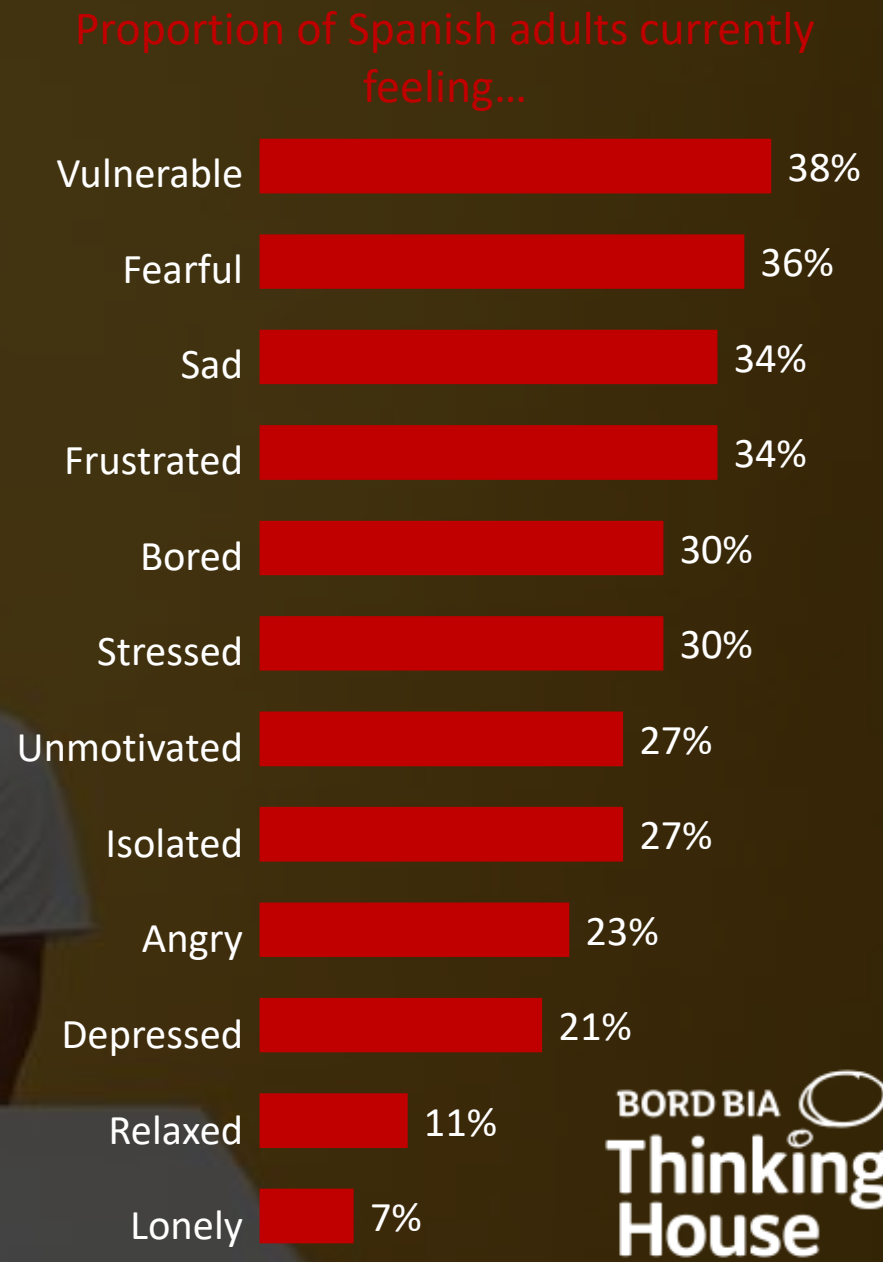
Given the daily news and the realities that many of us are facing, its hardly surprising that Spanish adults are experiencing some very negative emotions.

Being vulnerable fearful and sad 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, FRUSTRATED & BORED**. Again as highlighted in other markets, perhaps this is reflective of how many younger peoples' social worlds have been disrupted.

The 35 to 54 Years Olds are most likely to claim they feel fearful, sad and somewhat depressed. Perhaps reflective of the lack of certainty around what the future holds.

While over 55s are most likely to feel **ANGRY & VULNERABLE**.



Source: Bord Bia Indicators Barometer

BORD BIA Thinking House

#13 Chameleon Living

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…

71%

of Spanish parents are having more quality time with their families now as a result of the Covid-19 response

Source: Bord Bia Indicators Barometor

BORD BIA Thinking House

#13 Chameleon Living

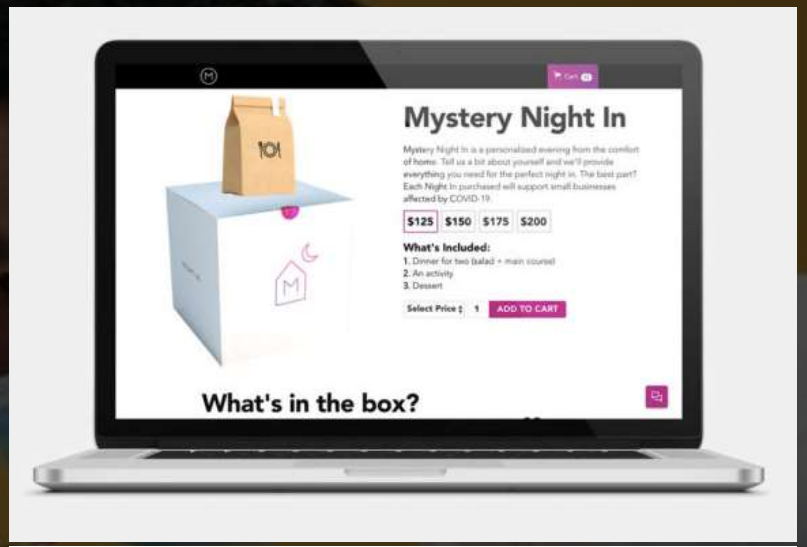
Us Time: “Honey I’m (always) home”

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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#13 Chameleon Living

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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#13 Chameleon Living

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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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

BORD BIA Thinking House

Photo by cottonbro from Pexels

Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 24th



#14 Delivery Fatigue.

How consumers are opting-in and out of food delivery

BORD BIA Thinking House

Photo by cottonbro from Pexels

#14 Delivery Fatigue

Watching out for ‘behavioural fatigue’

You may well have heard the phrase **Behavioural Fatigue** being bandied about in the media in recent days and months. It is a phrase that has caused controversy, particularly in Britain, where the government there came under fire for using ‘fatigue’ as justification for their strategic response to the pandemic.

The ‘theory’ is a simple one; ‘people will get tired of the asks of them during lockdown’. Controversially, the British Government put this argument forward as justification for their delayed response to some aspects of the crisis. It prompted more than 600 academics to recently sign an open letter “expressing concern” about the UK government’s use of behavioural science. Even in today’s Irish Times (Apr 24th), you will find an open letter from Pete Lund of the ERSI pointing out that there is ‘no evidence to support the idea of behavioural fatigue’. On the contrary, it would seem if people understand WHY they are being asked to change their behaviour they can endure quite a bit.

Behavioural Fatigue, as hypothesised by the British Government, was little more than just that – an hypothesis. So for our final indicator we’ve taken the liberty of hypothesising with behavioural science too. Our hypothesis is that consumer will get tired of ‘home delivery’, they will long for bricks and mortar retailing, they are jaded of cold take-aways arriving at their doorstep.

We call this Indicator **Delivery Fatigue**.

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#14 Delivery Fatigue

Instant Gratification v Delayed Gratification

One way of helping us understand if Delivery Fatigue is a real phenomenon or just ‘whacky’ theory from the Thinking House, is to think about **Instant Gratification** and **Delayed Gratification**.

Traditional bricks and mortar retailing delivers on Instant Gratification. Impulse shopping is just one very real example of this in action, the impulse pick-up of at a supermarket check-out has been proven to deliver ‘pleasure or fulfilment without delay or deferment’ – classic instant gratification behaviour.

And yet, there is an emerging body of evidence that Delayed Gratification can be MORE REWARDING for consumers. US research agency, Razorfish, shows that people get more excited waiting for online purchases to arrive than when they buy in-store.

The opportunity, Razorfish argue, is for marketeers to ‘engineer’ the dosage of ‘digital dopamine’ by drip-feeding updates to the consumer when they order online – 62% of US consumers ‘get excited’ when they get a text/e-mail updating them on the status of their order.

But can **Delayed Gratification** really be ‘rewarding’ when we order food?

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#14 Delivery Fatigue

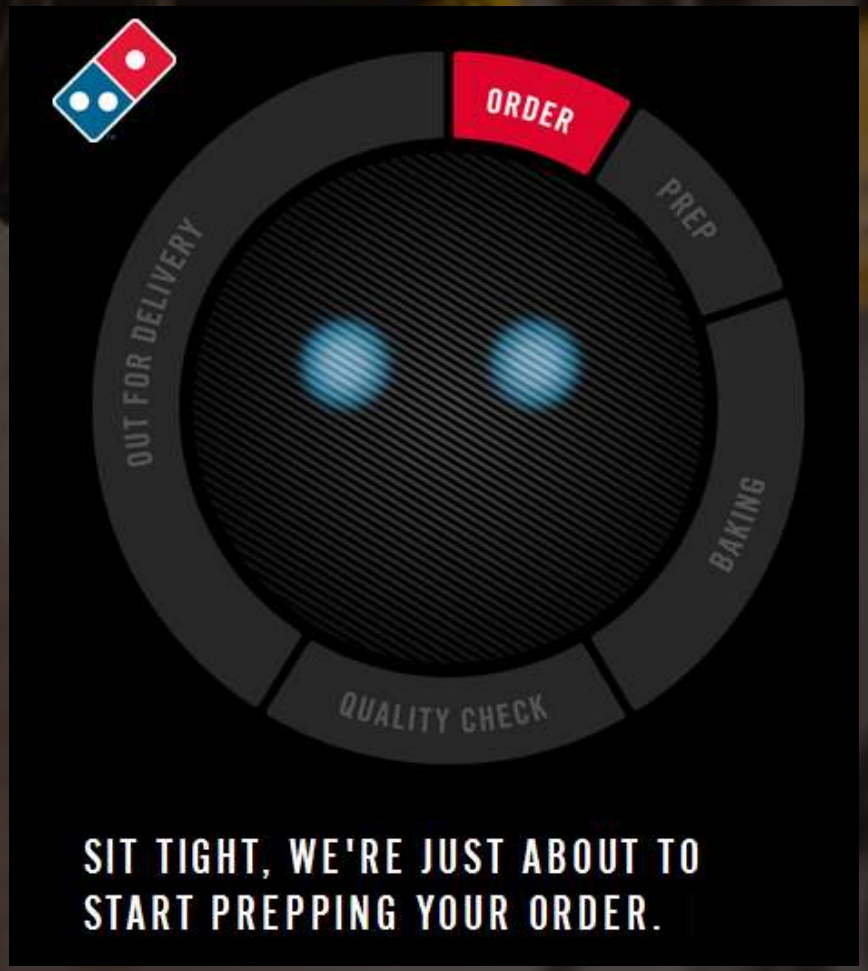
Dominos Pizza & Delayed Gratification

A prime example of a brand successfully managing Delayed Gratification is Dominos Pizza.

Despite being one of the most recognizable brands in America, between 2006 and 2008 Domino's Pizza was in crisis. Domino's stock price hit a record low–$2.83 a share in November 2008. Today, it's up around $72 a share.

So what turned Dominos from crisis to champion? Well a big part of the turnaround was improved product. But so too was improved delivery of that product.

Through its pizza tracker and builder tools, the company made online ordering a cornerstone of its business. The pizza tracker is a prime example of managing Delayed Gratification by providing consumers with 'real-time' updates of the status of their order.



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#14 Delivery Fatigue

Food delivery during during lockdown

According to Google's weekly 'Think With Google' insights, for the last five years, "restaurants near me" consistently ranked as the most popular "near me" search.[2] But consumer behaviour has changed.

In the US, the focus has shifted to alternative mealtime solutions. They are seeing more consumer interest related to "delivery" in the last three weeks as a result of national guidance to shelter in place; search interest for "food delivery" related queries has spiked 100%.

Safety appears to be is paramount. In fact, search interest for "is food delivery safe" has increased 650% across the U.S. since the beginning of March. Reassuring customers that you understand the concerns for safety and are taking important steps to address the current situation is key.





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#14 Delivery Fatigue

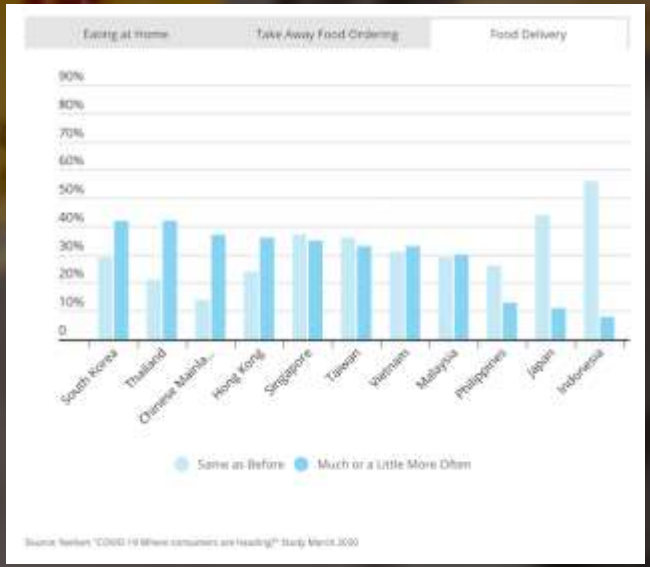
Can we learn from Asia?

According to Nielsen, Consumers across Asia have signaled their eating habits may change permanently once the world moves beyond the impact of the novel coronavirus (COVID-19).

Consumers in Chinese mainland, Hong Kong, South Korea, Malaysia and Vietnam will rethink and re-prioritize the place eating at home has in their lives. In Chinese mainland, 86% said they would eat at home more often than before the outbreak.

Nielsen found a high demand for more takeaway food and home deliveries of food, particularly in Hong Kong, South Korea and Thailand. These markets epitomize “on-the-go” lifestyles and value the convenience on-the-go food offerings bring.

The shifts away from out-of-home dining to at-home food delivery, has not been as dramatic across Asia as we may have been lead to believe. In markets like Japan and Indonesia consumers are ordering food delivery the same as they have before – partly due to ‘looser’ lockdowns but perhaps also do a lack of and established effective home-deliver infrastructure.



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#14 Delivery Fatigue

So it's the same story in Ireland right?

Actually no. Consumers behaviour in Ireland around home delivery appears to be very different. Just 10% of Irish adults claim they are getting meals delivered more often as a result of Covid 19. Of those approximately one third expect to continue to do so more in the future.

That number drops to just 8% amongst Irish adults getting meals delivered from formal restaurants. And of those 4 in 10 expect to continue to do so more in the future.

So the change in home delivery of meals in Ireland appears to be a NICHE CHANGE in consumer behaviour in Ireland. Our experiences are very very different to those in the Asian markets so often citied as likely to represent our post-Covid world.

So whats going on? Why is the Irish experience so different?

23%

of Spanish adults claim they are getting meals delivered more often as a result of Covid 19

Source: Bord Bia Indicators Barometor

14%

of Spanish adults claim they are collecting takeaway meals more often as a result of Covid 19

Source: Bord Bia Indicators Barometor

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#14 Delivery Fatigue

A disappointing start to the home delivery experience

The experience of many consumers in the early days of lockdown appears to have been quite mixed with some very poor customer experiences.

Home delivery of groceries, for example, ran aground very early on with retailers flagging three week wait times and retailers advertising that home delivery would only be available to the most vulnerable.

In food service it would appear that consumer fears around the safety of home delivery weren't a barrier in Ireland initially at-least. On the contrary the channel also saw demand outstrip supply.

Over the course of one weekend at the end of March, many restaurants simply scrapped delivery services because they found themselves swamped with orders they were unable to fulfil.

It would appear that these early disappointments may have resulted in 'fatigue' with home delivery kicking-in very early indeed in Ireland.



THE IRISH TIMES

Fri, Apr 24, 2020

NEWS | SPORT | BUSINESS | OPINION | LIFE & STYLE | CULTURE

Food & Drink › Recipes | Restaurants | Drink

Coronavirus: Restaurants scrap takeaway service as orders pile up and queues mount

Some have been overwhelmed with calls; others have struggled with social distancing

Mon, Mar 23, 2020, 16:00

Marie Claire Digby

Follow

Flooded with calls: 'By yesterday we had it nailed, and feedback on the food was great. But people were getting frustrated that they couldn't get through on the phone,' says Gaz Smith of Michael's of Mount Merrion. Photograph: Nick Bradshaw

Demand for takeaway food soared over the weekend, causing problems for some of the restaurants that have turned to offering meals for collection and delivery in order to keep their businesses alive during the coronavirus outbreak.

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#14 Delivery Fatigue

The emergence of click and collect

The early problems encountered with home-delivery has seen many businesses ‘pivot’ to click and collect models. The quality and quantity of businesses offering this approach in Ireland has been striking.

There appears to be a particularly impressive ‘movement’ apace at local level with farmers markets and artisan producers moving into the click and collect space. Equally numerous local restaurants have moved into click and collect also.

Perhaps its our innate friendliness that makes the Irish more comfortable with the ‘person to person’ nature of the click and connect model - this way of doing business gets us out and about, even if its just for a quick trip to a local supplier. Equally perhaps there is a very real community spirit at play around the country that sees people wanting to support local businesses in this way.

In any event, its clear from our analysis that adoption of food delivery so far appears to be a niche change in behaviour. We will be tracking this behaviour over the coming months. But for now, at least, we hope you’ll allow us the luxury of claiming that in Ireland Delivery Fatigue IS a real behaviour. Even if we never had a chance to get tired of it in the first place….

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Indicators

Coronavirus COVID-19

Early clues on the post-crisis consumer & market realities
April 24th



#14 Delivery Fatigue.

How consumers are opting-in and out of food delivery

Implications for Irish Food and Beverage

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

BORD BIA Thinking House

Validators

Coronavirus COVID-19

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. Navigate your way through the validators by using the menu below:







BORD BIA Thinking House

Validators

Coronavirus COVID-19

Research Design & Methodology

BORD BIA Thinking House



Image by Becca Clark from Pixabay

Validators

Coronavirus COVID-19

A nationally representative survey of n=1,000 adults in Spain.

The fieldwork for this study ran from 14th May – 18th May 2020.

Research partners Opinions clarity and confidence

BORD BIA Thinking House

Sample Profile (i)

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

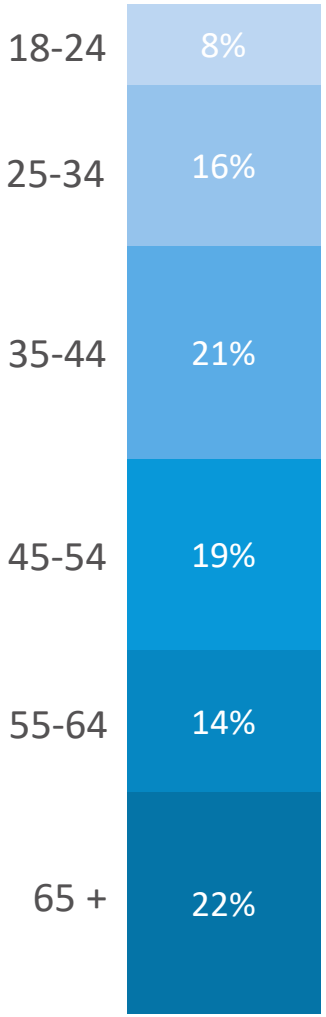
Validators

Coronavirus COVID-19

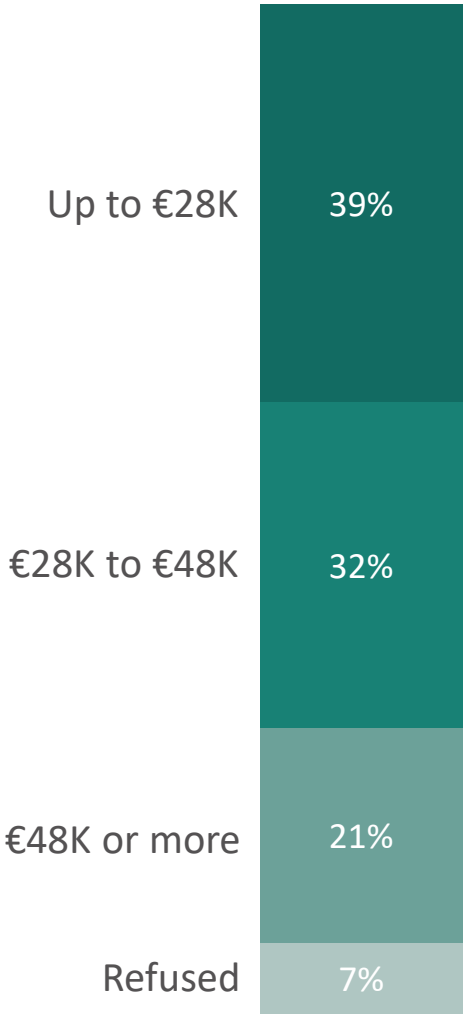
Gender



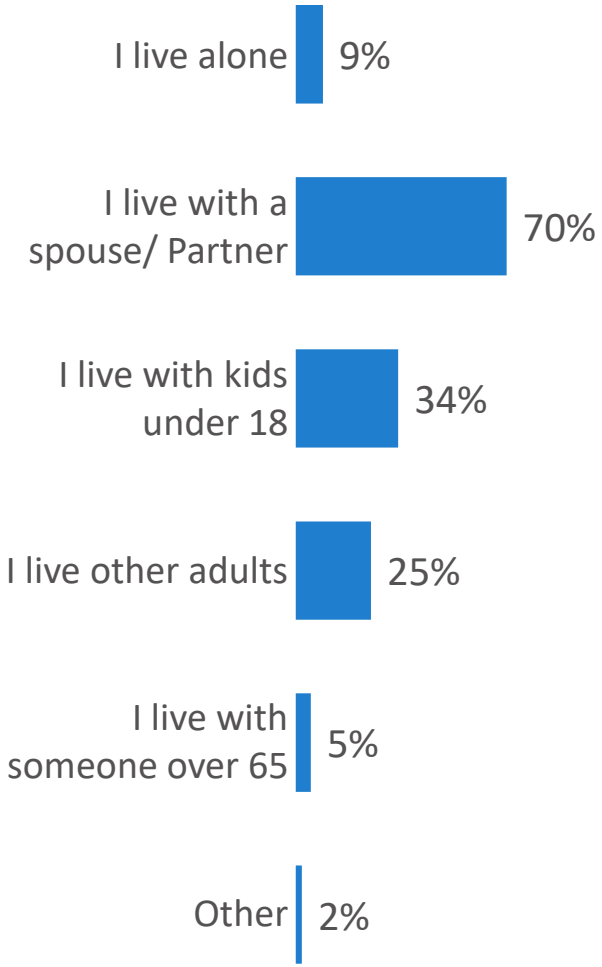
Age



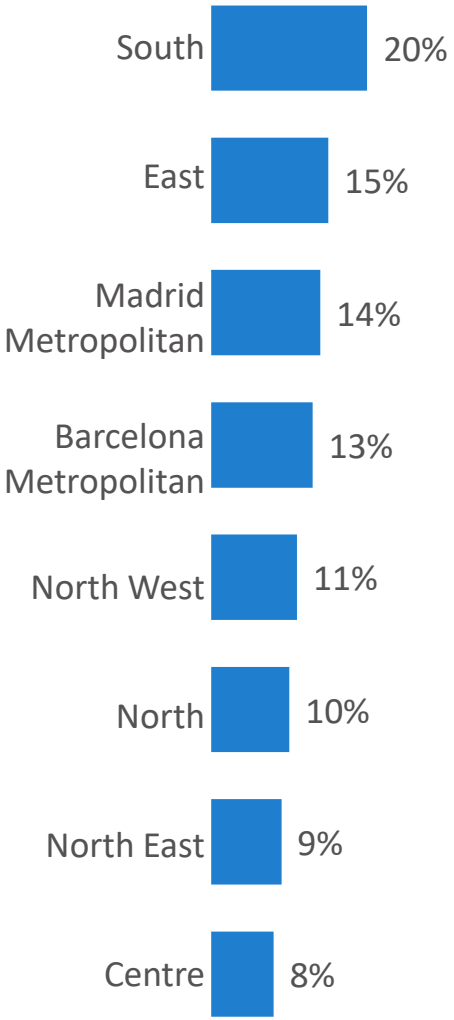
Household Income



Household Composition



Region



Validators

Coronavirus
COVID-19



Mood of the Market

BORD BIA
Thinking
House

Mood of the Nation

Validators

Coronavirus COVID-19

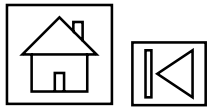
Given the impact of Covid-19 in Spain, Spanish adults tend to be adhering strongly to recommended guidelines around handwashing (97%*) and avoiding social contacts outside of the household (94%*). There is also very high level of wearing protective elements – especially in terms of grocery shopping regarding wearing of masks (88%*) and wearing of gloves (86%*).

Feeling vulnerable is the most common emotion experienced among Spanish adults when thinking about Covid-19 (prevalent among 38%).

Vulnerability is driven by over 55's while under 35's tend to be feeling more bored and frustrated.

The long term impact on the economy is a major concern (91% very concerned about this) with almost 8 in 10 very concerned about the ability of the health service to cope and over 6 in 10 around the impact on mental health and a similar proportion around the impact on economic wellbeing. Over 3 in 10 are very concerned about the continued availability of food and drink.

** Doing all or most of the time*



Current Adherence To Specific Guidelines

Validators

Coronavirus COVID-19

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

Proportion of Spanish Adults adhering to **All or Most of the time**



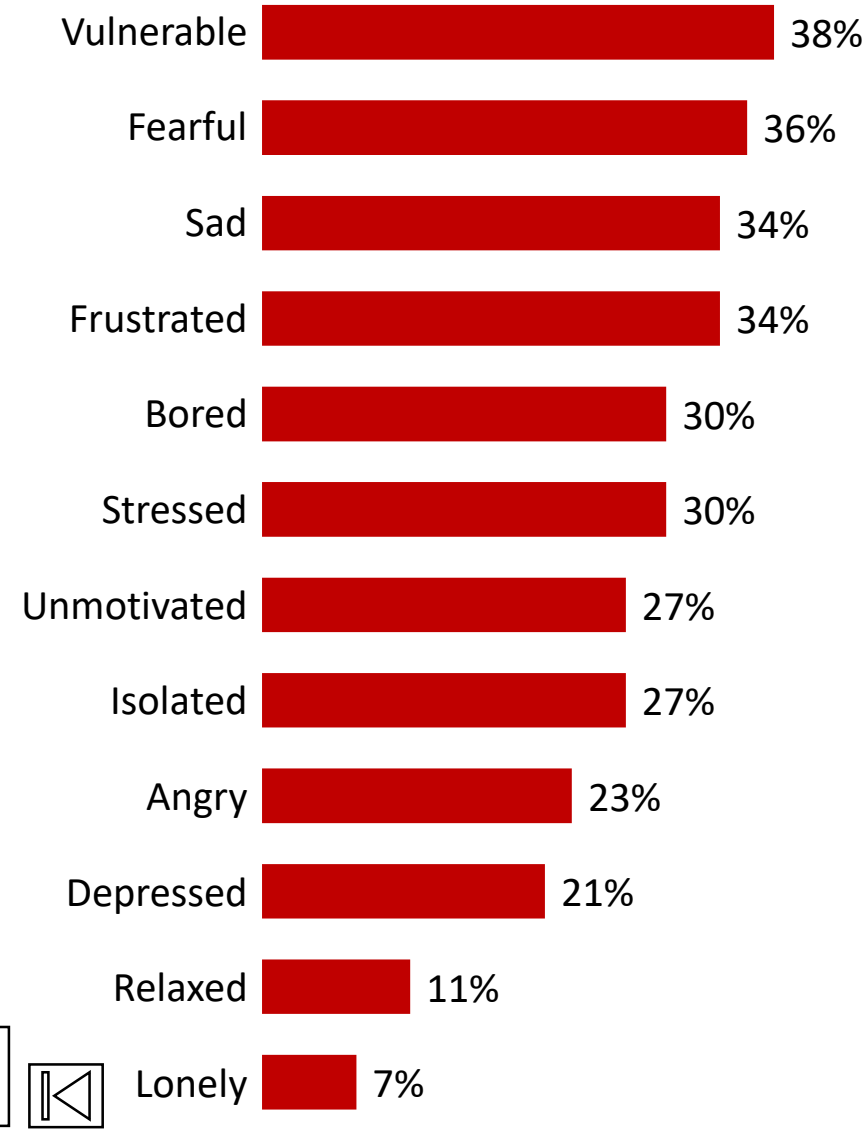
To what extent have you generally adhering to each of the following recommended actions designed to limit the spread of Coronavirus?

Mood of the Nation

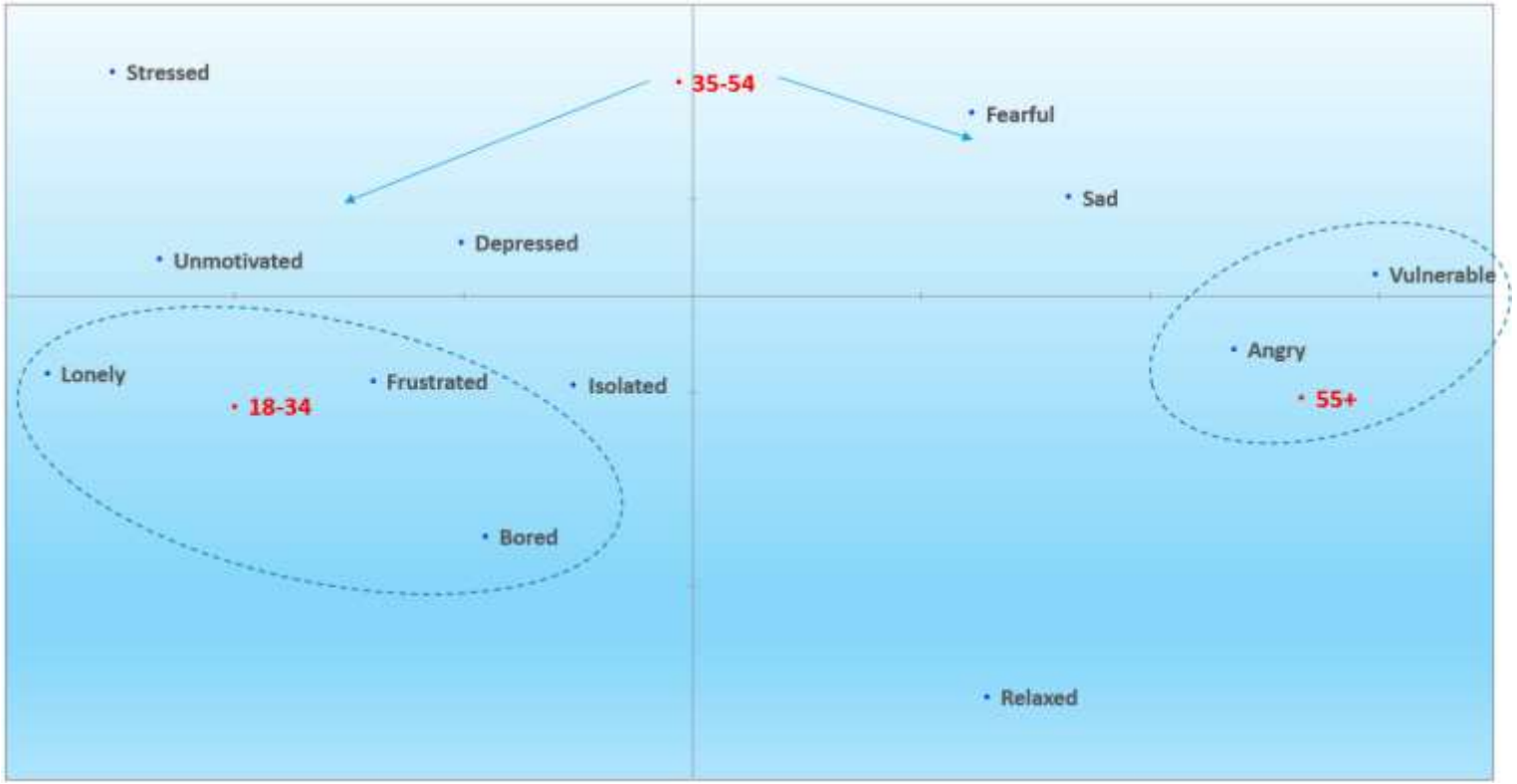
(Base: Adults 18+ in Spain n=1,000)

Validators Coronavirus COVID-19

Proportion of Spanish adults currently feeling…



Relative Association of Feelings to Age Groups



Which of these words describe how you feel when you think about the Coronavirus (Covid-19) pandemic?

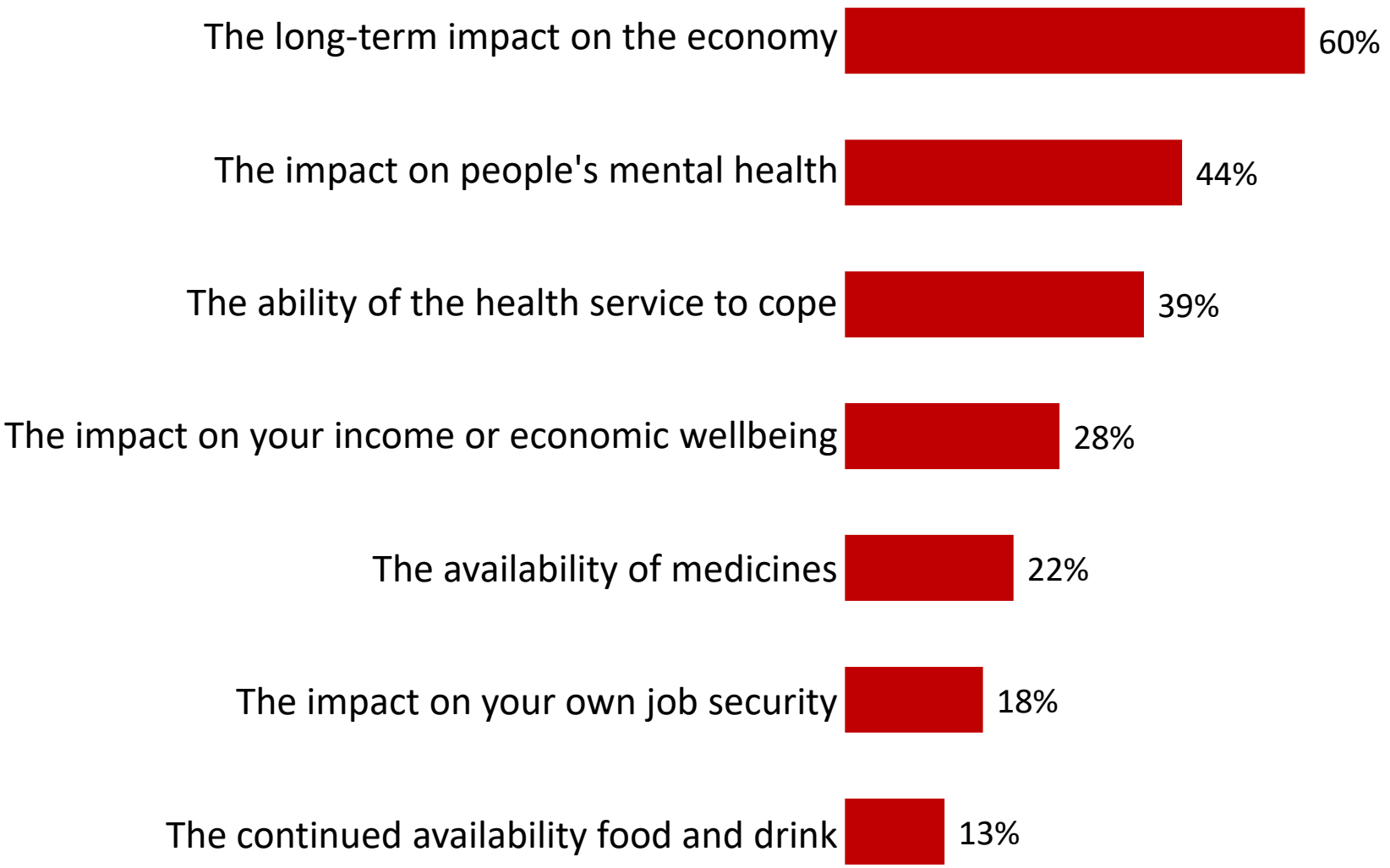
Level of Concern For Various Aspects

Validators

Coronavirus COVID-19

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

% Very or Extremely Concerned about



To what extent are you concerned by each of the following aspects of the response to Coronavirus (Covid-19), if at all?

Validators

Coronavirus COVID-19

Sticky Behaviours



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Validators

Coronavirus COVID-19

MORE LIKELY

CONTINUE TO DO MORE POST PANDEMIC

LESS LIKELY

NICHE CHANGES	MASS CHANGES
A behaviour in this quadrant represents an aspect consumers are doing a little more often since restrictions were enforced but plan to continue doing more of it post pandemic.	A behaviour in this quadrant represents an aspect consumers are doing much more often since restrictions were enforced and plan to continue doing more of it post pandemic.
A behaviour in this quadrant represents an aspect consumers are doing a little more often since restrictions were enforced and don't plan to continue doing more of it post pandemic.	A behaviour in this quadrant represents an aspect consumers are doing much more often since restrictions were enforced but don't plan to continue doing more of it post pandemic.
NO CHANGES	CRISIS CHANGES

LESS PREVALENT

DOING MORE SINCE COVID-19 RESTRICTIONS

MORE PREVALENT

Money & Shopping Review

Validators

Coronavirus COVID-19



MINIMISING TRIPS TO SHOP

Over 7 in 10 (71%) of Spanish adults have minimised their trips to the shop as a result of Covid-19 but this behaviour is less likely to continue post pandemic compared to other shopping behaviours.



USING CONTACTLESS CARD PAYMENTS

Over half (53%) of Spanish adults are using contactless card payments more now since Covid-19 restrictions, and this behaviour is likely to continue strongly post pandemic.



BRAND CHOICE

Over 4 in 10 (42%) Spanish adults are buying more local grocery brands now as a result of Covid-19, with this behaviour likely to continue post pandemic by the majority of these recent adopters – especially prevalent among under 35 year olds.



GROCERY SHOPPING ONLINE

Over 4 in 10 (41%) of Spanish adults are shopping more online now for groceries with the majority of this group likely to maintain this behaviour post pandemic – highlighting the challenge for retailers.



AGENCY SHOPPING

A third (33%) of Spanish adults are shopping more now for older family members or friends and again is a behaviour that has potential to remain for many post pandemic.



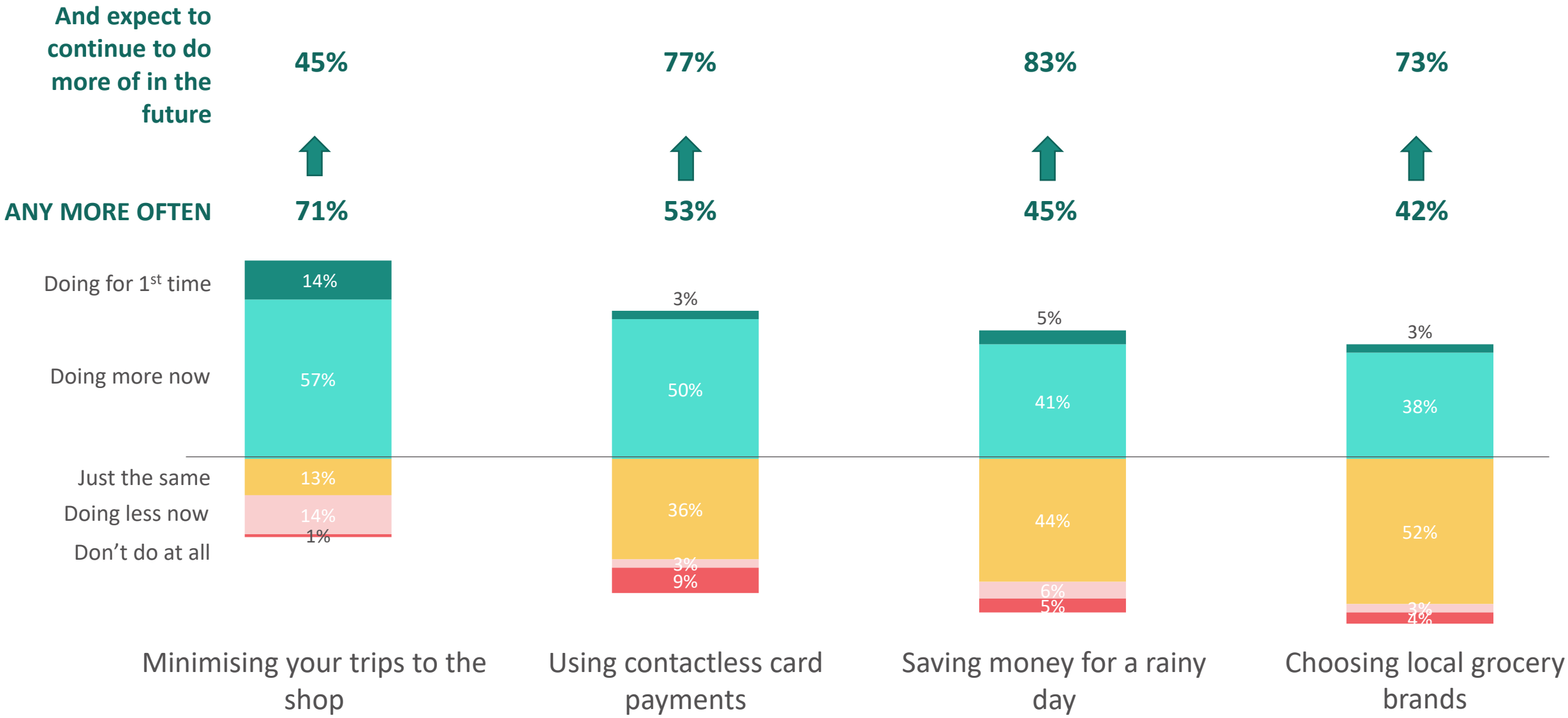
STOCKING UP

A third (33%) of Spanish adults are stocking up more on essential food and drink for their households as a result of Covid-19, but this behaviour is much less likely to continue post pandemic.

Money & Shopping (i)

Validators

Coronavirus COVID-19

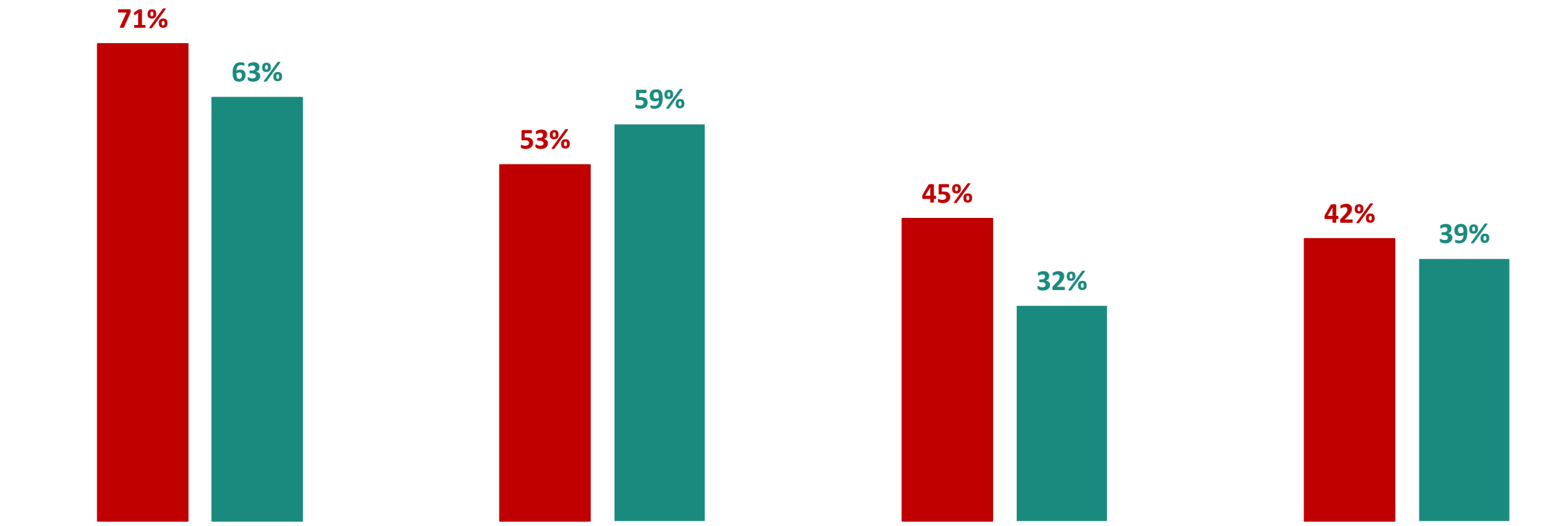


Money & Shopping (i) ES vs. IE

Validators

Coronavirus COVID-19

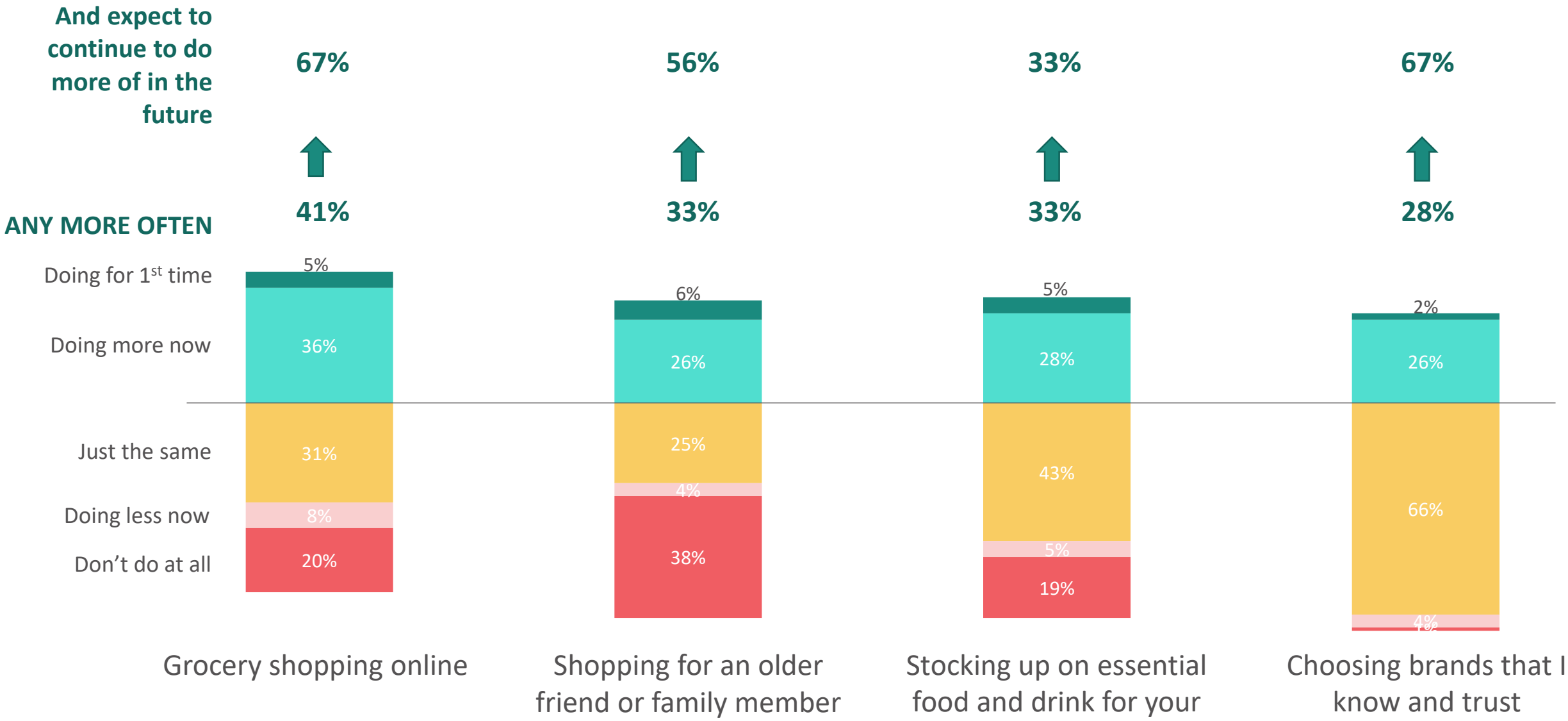
PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Money & Shopping (ii)

Validators

Coronavirus COVID-19

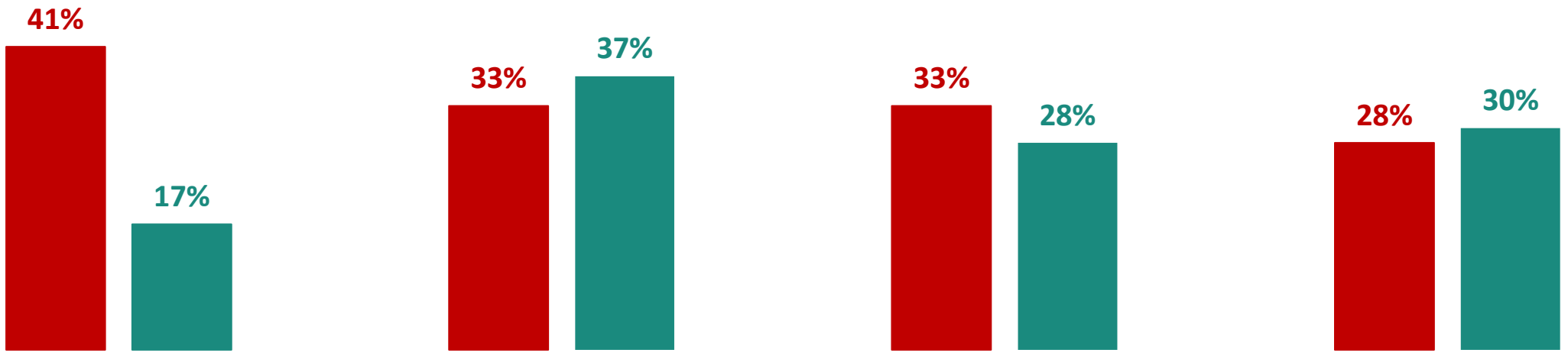


Money & Shopping (ii) – ES vs. IE

Validators

Coronavirus COVID-19

PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Validators

Coronavirus COVID-19

MORE LIKELY

CONTINUE TO DO MORE POST PANDEMIC

LESS LIKELY

NICHE CHANGES	MASS CHANGES
A behaviour in this quadrant represents an aspect consumers are doing a little more often since restrictions were enforced but plan to continue doing more of it post pandemic.	A behaviour in this quadrant represents an aspect consumers are doing much more often since restrictions were enforced and plan to continue doing more of it post pandemic.
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NO CHANGES	CRISIS CHANGES

LESS PREVALENT

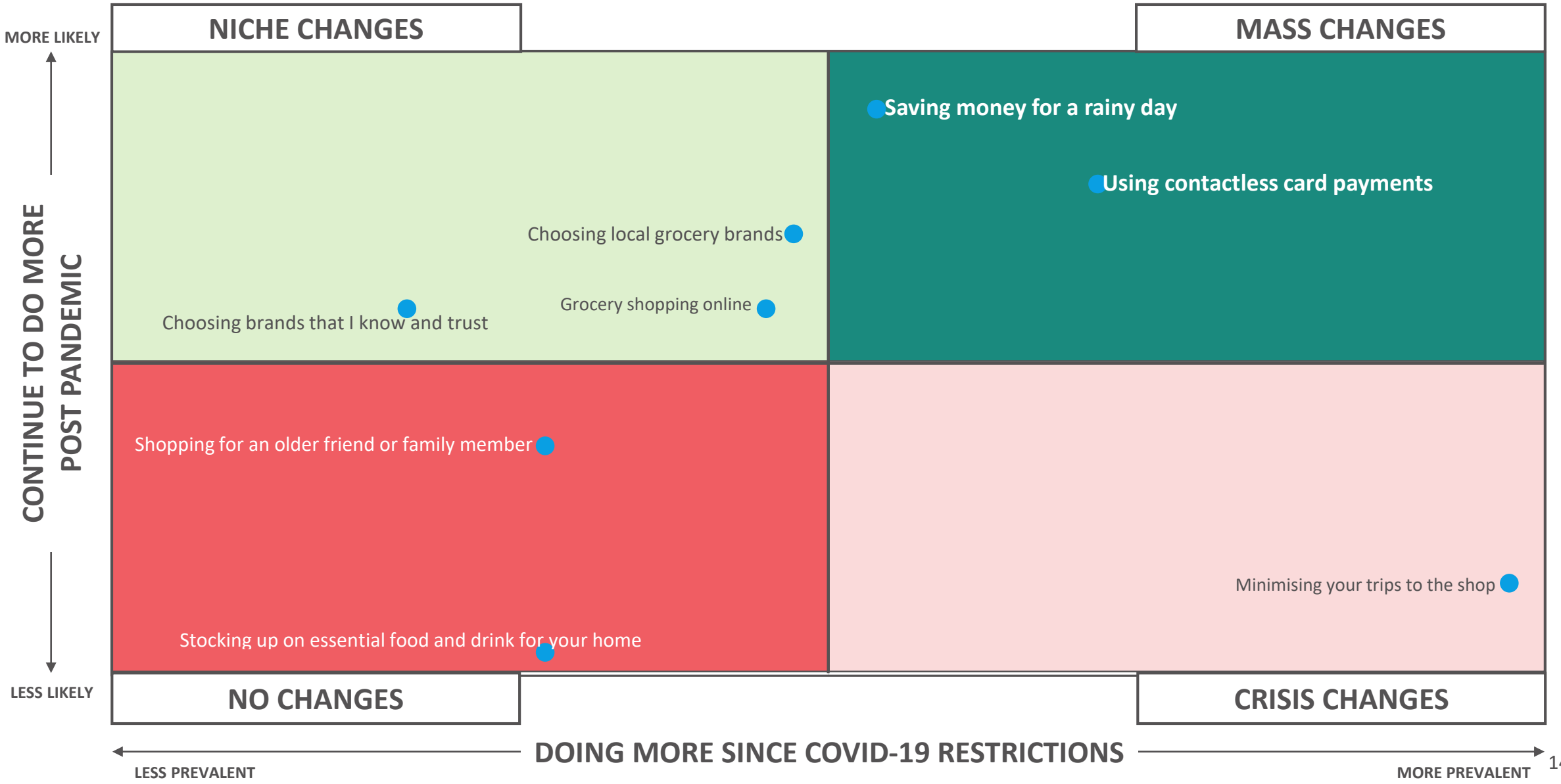
DOING MORE SINCE COVID-19 RESTRICTIONS

MORE PREVALENT

Money & Shopping

Validators

Coronavirus COVID-19



Family Life Health & Wellness

Validators

Coronavirus COVID-19



MORE QUALITY TIME WITH FAMILY

Over 7 in 10 (71%) of Spanish parents are spending more quality time with their families as a result of Covid-19, a behaviour there is strong intent to continue post pandemic.



BEING HEALTHIER

A sizeable proportion of Spanish adults are trying to improve their general health as a result of Covid-19 (41% trying to improve their health generally; 3% increasing their water intake). While the increase in these behaviours is not among the majority of adults, those adopting these now have a strong intent to continue post pandemic.



EXERCISING MORE

While again a sizeable proportion of Spanish adults have been more actively engaging in physical exercise as a result of the Covid-19 situation, the various restrictions on movement in Spain makes this somewhat polarising. For example…

30% are following a regular exercise routine more often but 20% are doing this less often

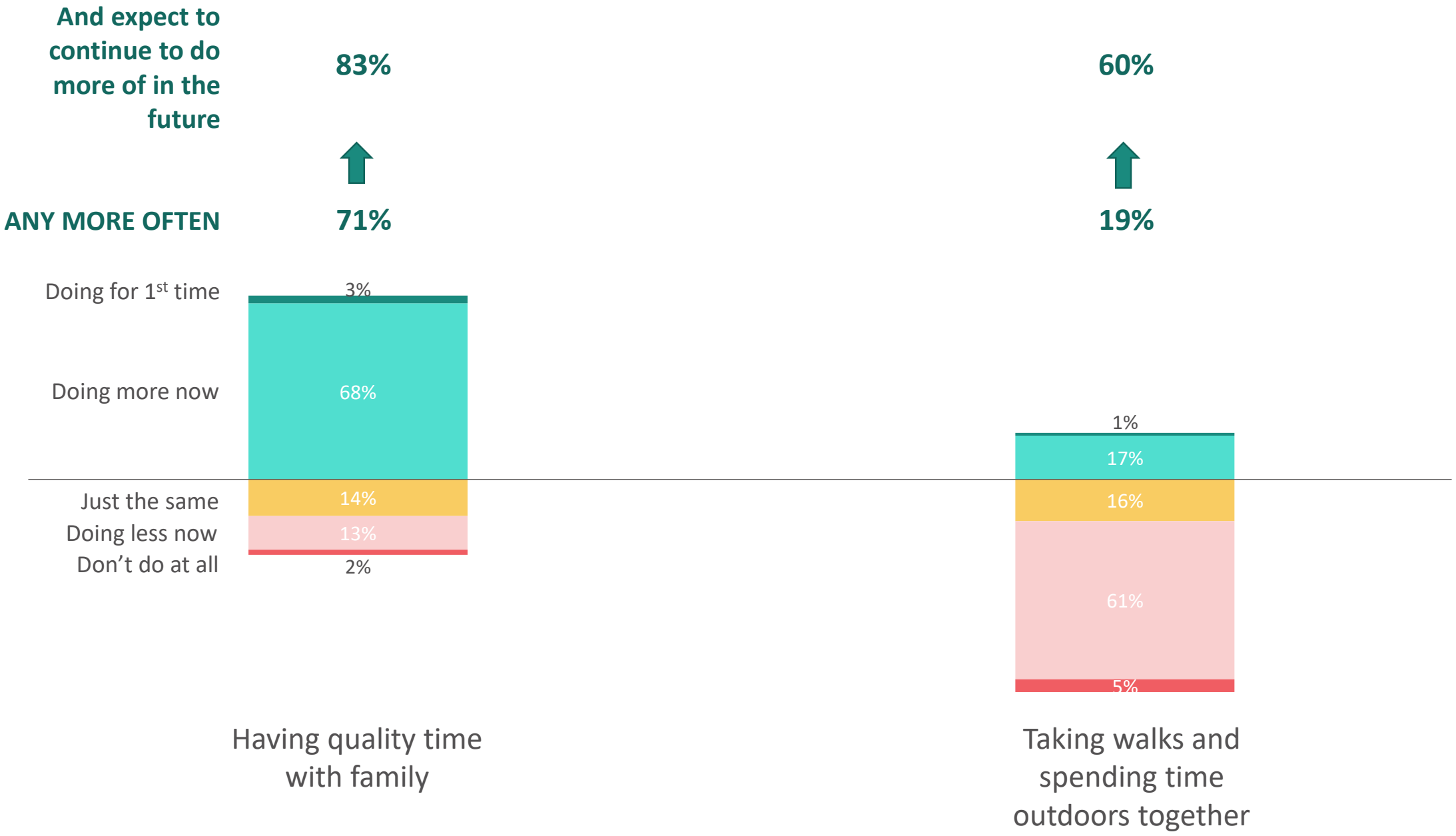
19% are walking, jogging or running outdoors more often but 43% are doing this less often



Family Life

Validators

Coronavirus COVID-19



Family Life – ES vs. IE

Validators

Coronavirus COVID-19

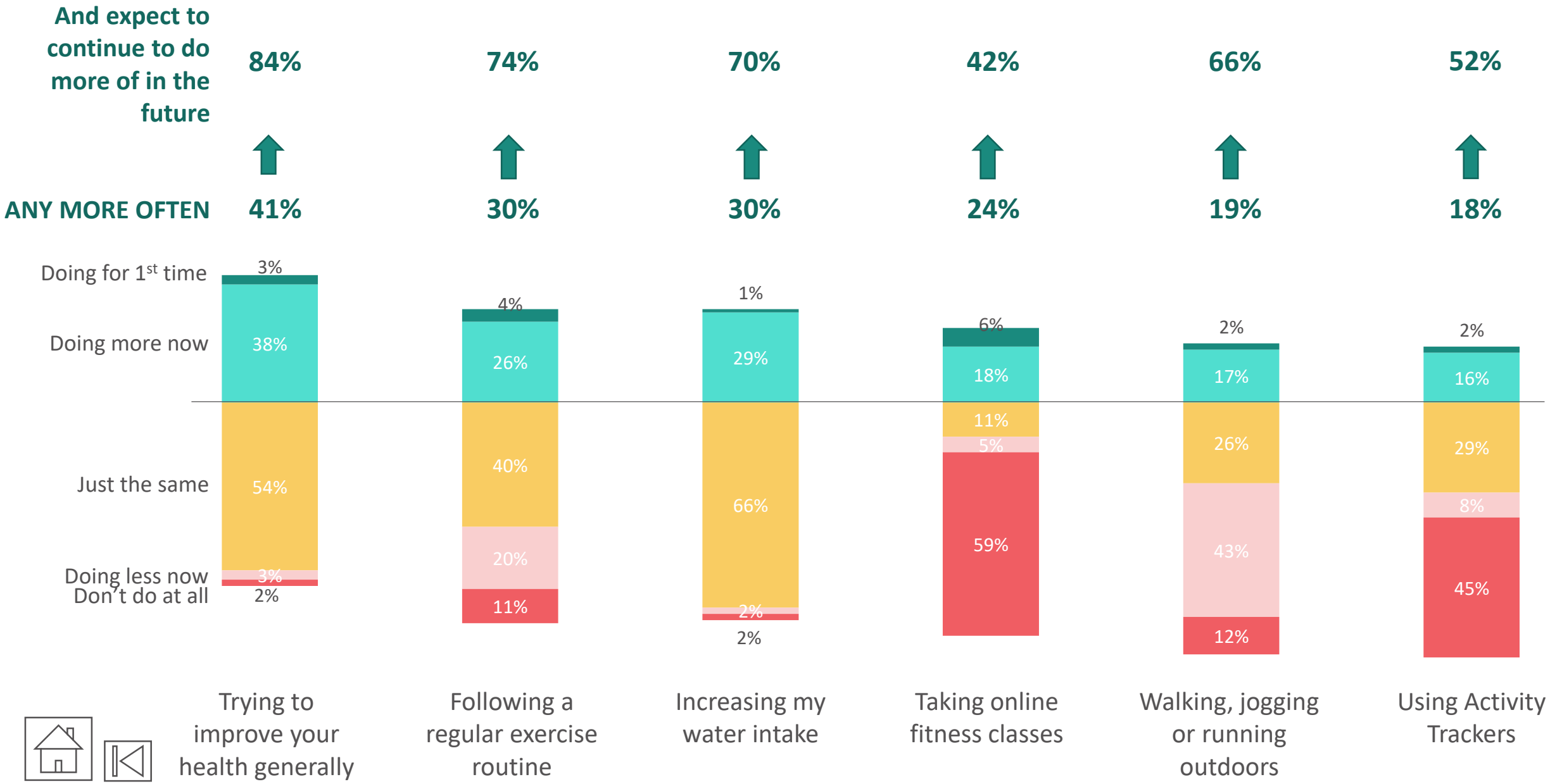
PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Health & Wellness

Validators

Coronavirus COVID-19

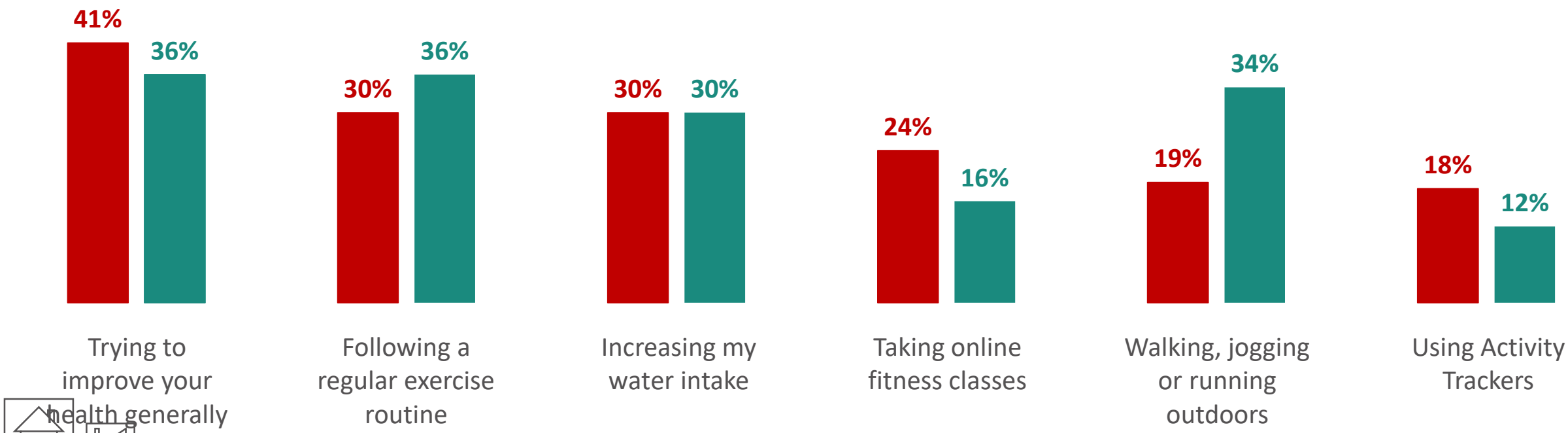


Health & Wellness ES vs. IE

Validators

Coronavirus COVID-19

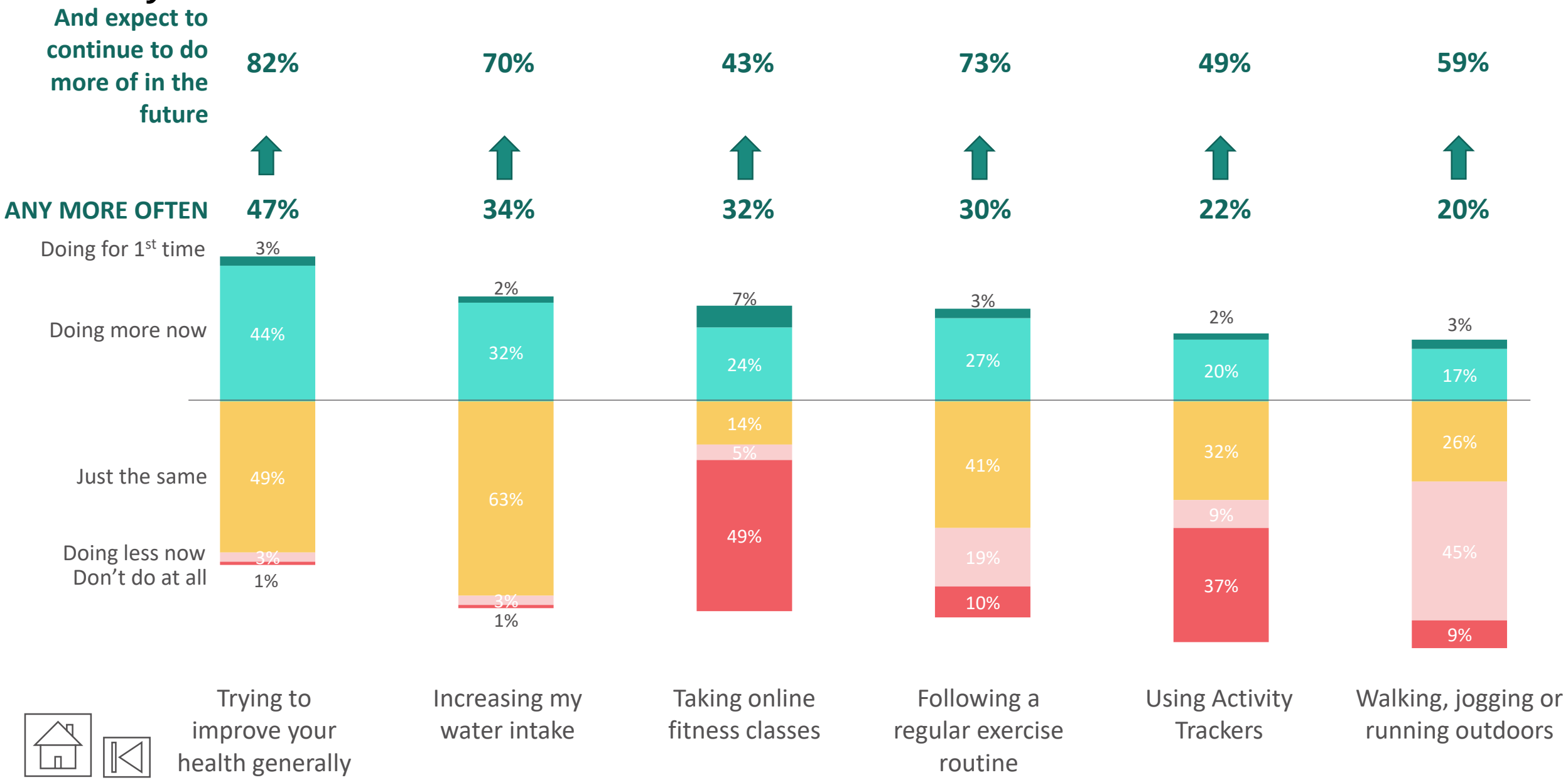
PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Health and Wellness -Family Life

Validators

Coronavirus COVID-19



Family Life

Validators

Coronavirus COVID-19

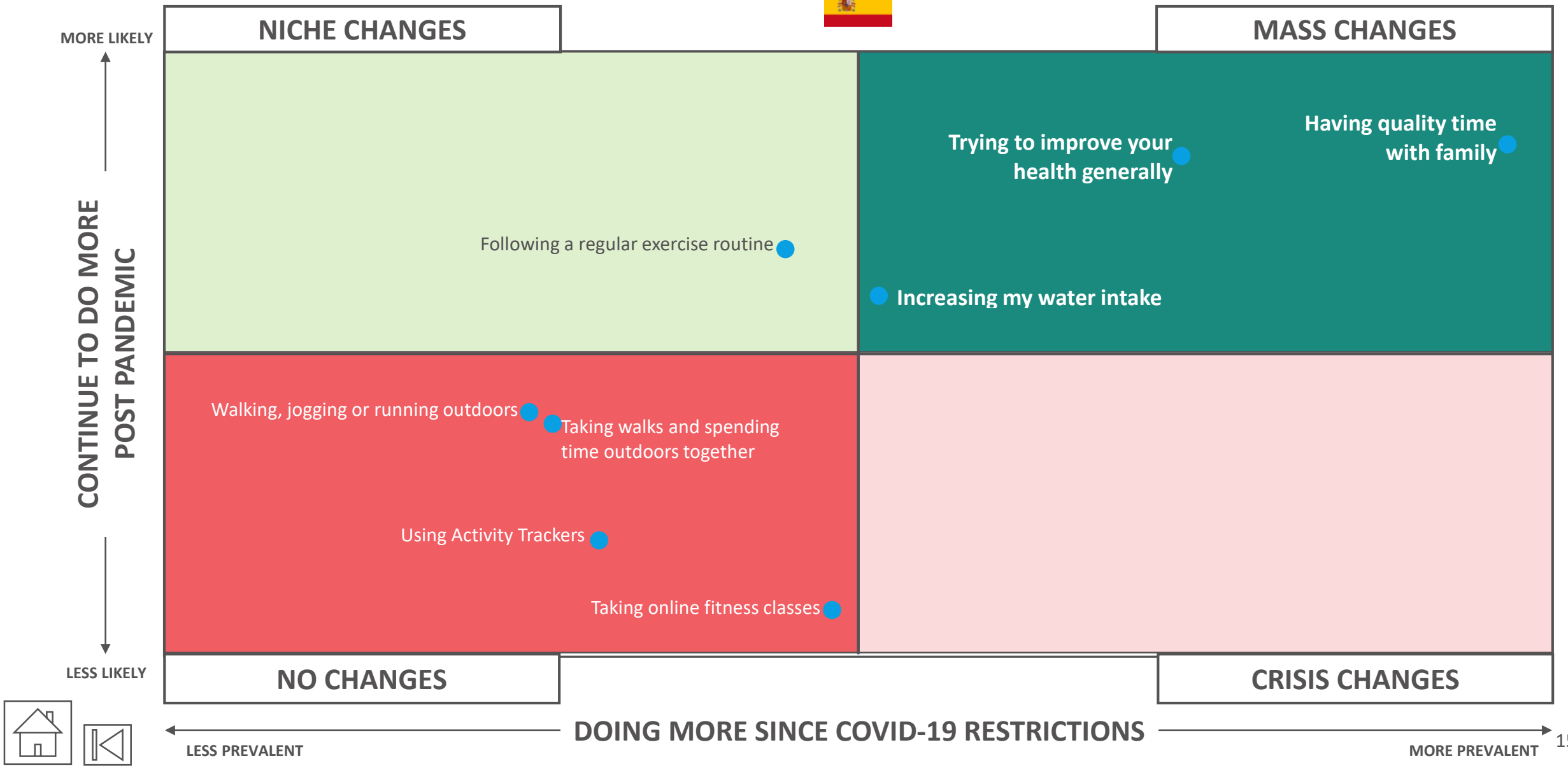


Family Life (Among Families)

Validators

Coronavirus COVID-19





Eating & Drinking Habits - ES **Validators**

Coronavirus COVID-19



RE-IGNITING TRADITIONAL FOOD RELATED BEHAVIOURS

Signs exist that many Spanish adults are engaging in more traditional activities when it comes to food & drink with 39% baking more often and 29% choosing more familiar favourite foods as a result of Covid-19. 36% are learning to cooking using recipes more also. Approximately half of these recent adopters across these behaviours are likely to continue them post pandemic.

TREATING



While many Spanish adults have partaken in treating activities, the penetration is quite polarising

33% are snacking more often outside meal times, but 14% are doing this less often

29% are having sweet treats more often, but 18% are doing this less often

Alcohol consumption however suggests a net decline in activity as a result of Covid-19

13% are consuming more alcohol during the week while 21% are consuming less

10% are consuming more alcohol at the weekend while 28% are consuming less



BETTER EATING

A sizeable proportion of Spanish adults have been actively engaging with better eating as a result of Covid-19, with 39% scratch cooking more often and 32% eating healthier for improved immunity.

Eating & Drinking Habits

Validators

Coronavirus COVID-19



FOOD SERVICE AT HOME

While the proportion of adults getting meals delivered and collecting takeaways tends to be higher than other markets researched, again these behaviour appears polarising.

23% are getting more meals delivered but 21% are getting less

14% are collecting takeaways more often, but 24% are doing this less

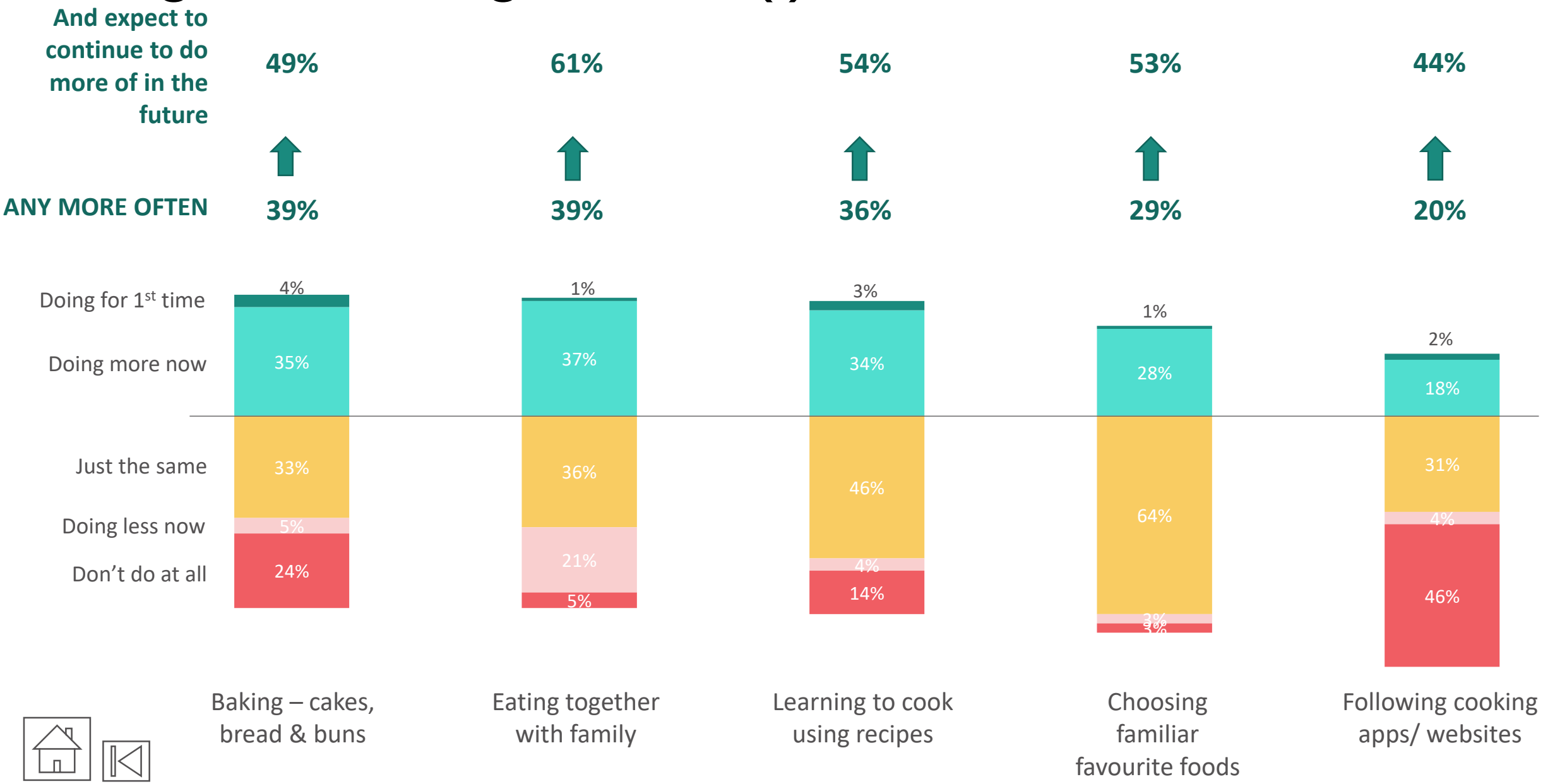


BEEF BUYING

Overall, more Spanish adults have been buying better quality beef than cheaper beef as a result of Covid-19 restrictions (17% buying better beef more often compared to 10% buying cheaper beef more often). 15% of adults have buying beef in larger packs or in bulk for stocking up purpose however.

Eating & Drinking Habits (i) **Validators**

Coronavirus COVID-19

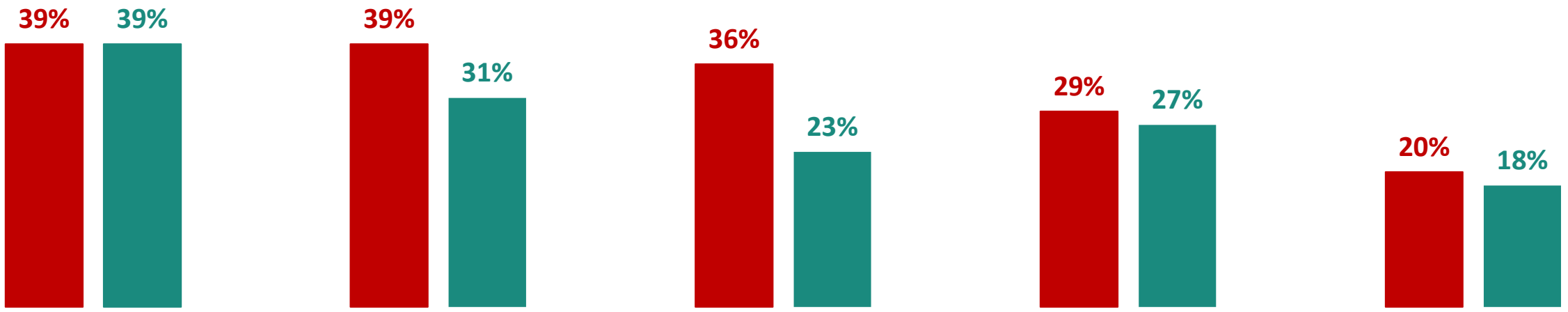


Eating & Drinking Habits (i) – ES vs. IE

Validators

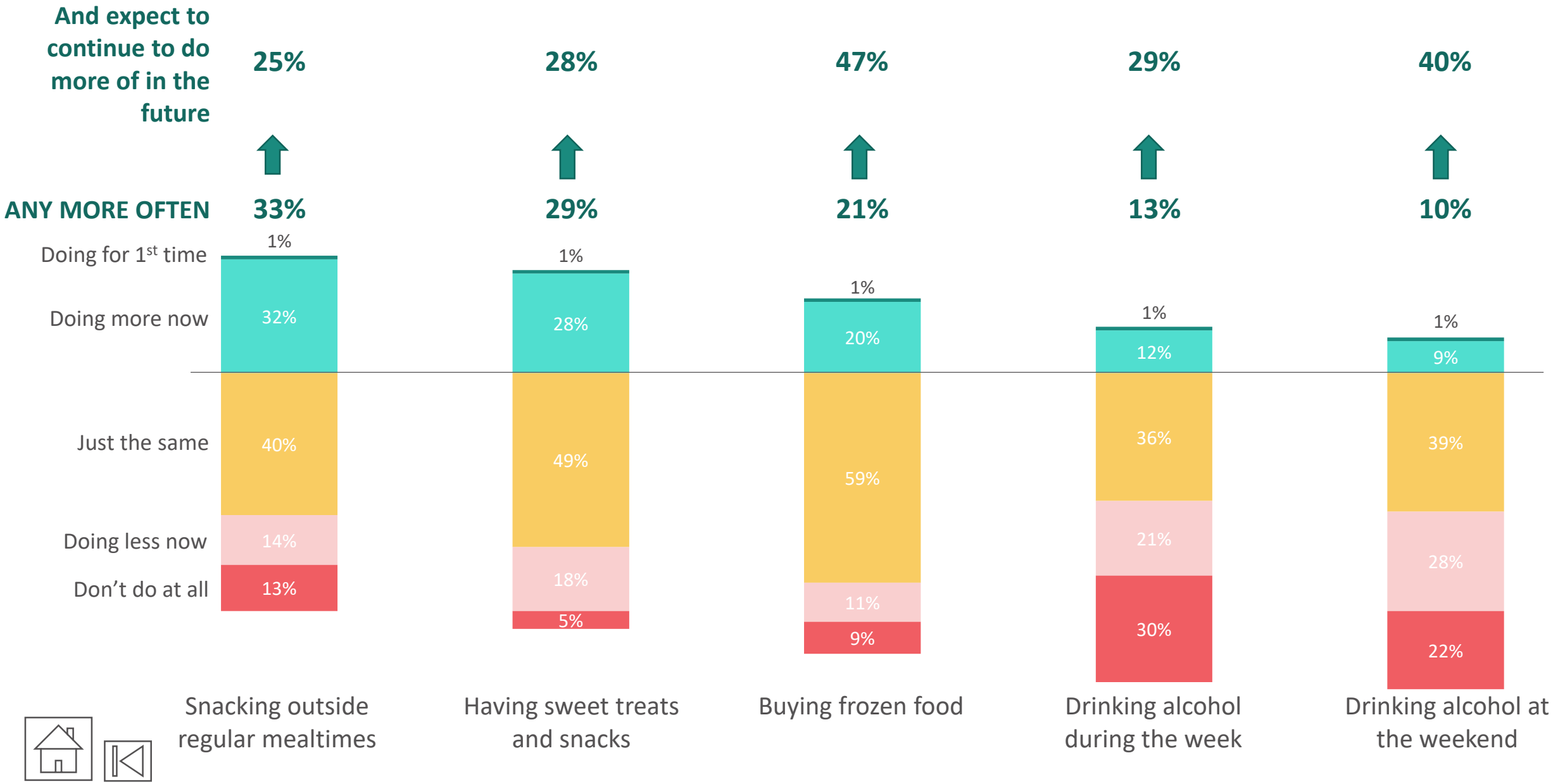
Coronavirus COVID-19

PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Eating & Drinking Habits (ii) Validators

Coronavirus COVID-19

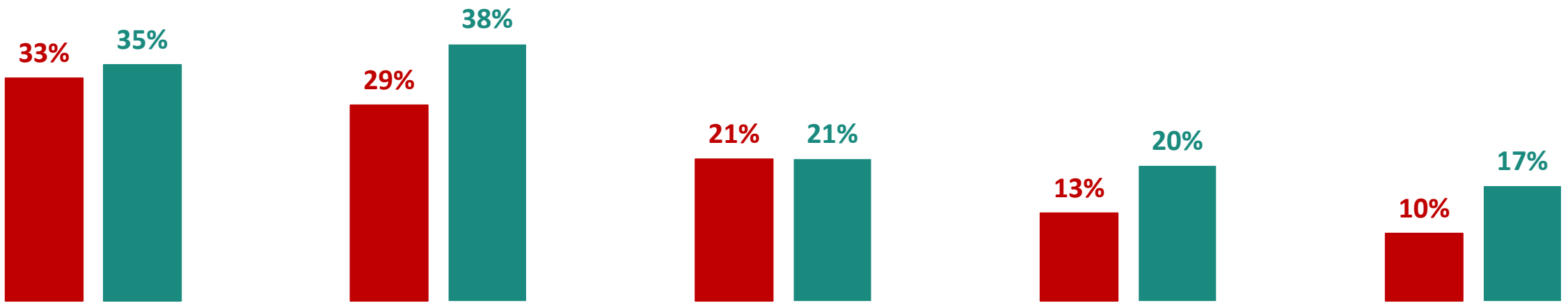


Eating & Drinking Habits (ii) - ES vs IE

Validators

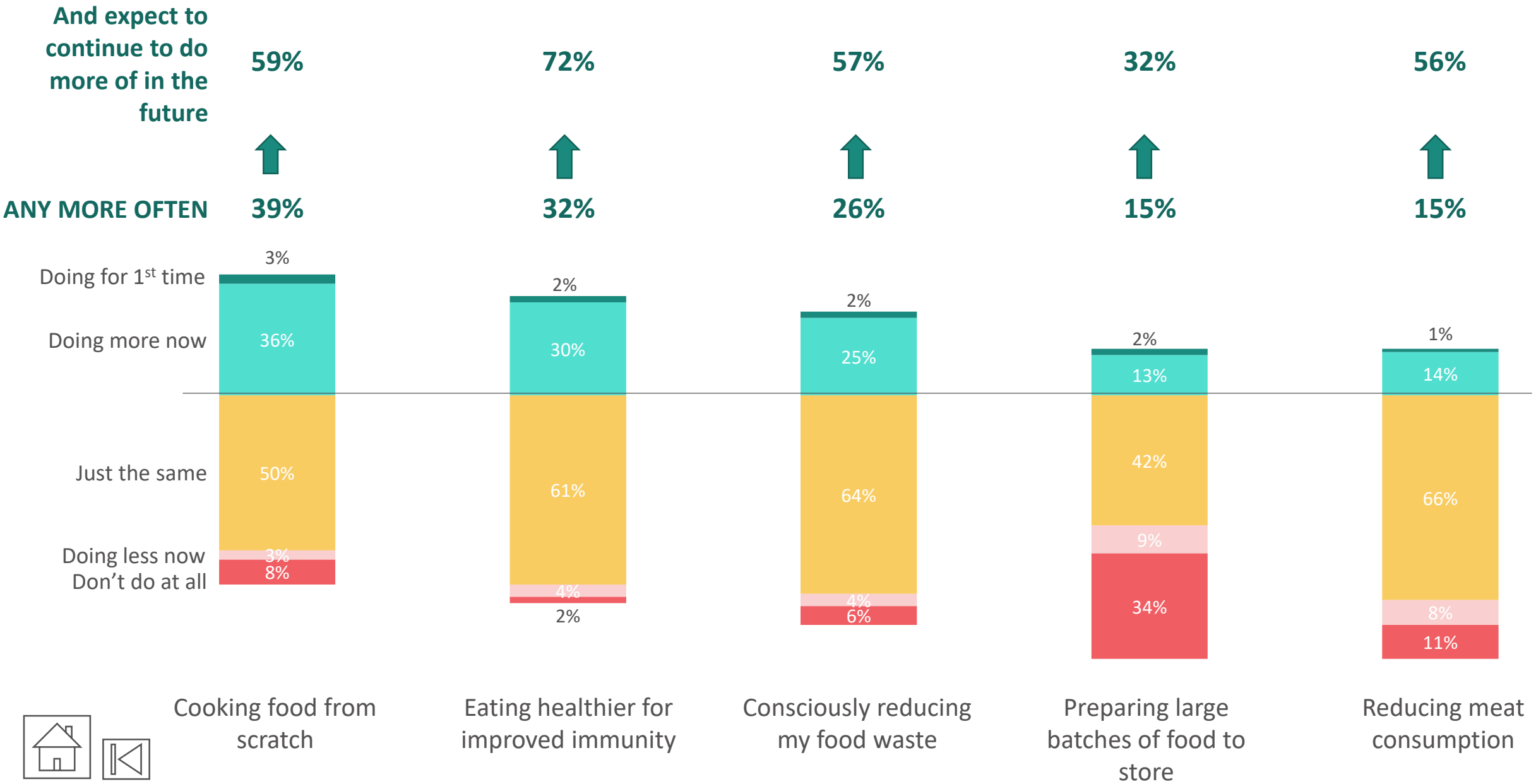
Coronavirus COVID-19

PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Eating & Drinking Habits (iii) **Validators**

Coronavirus COVID-19

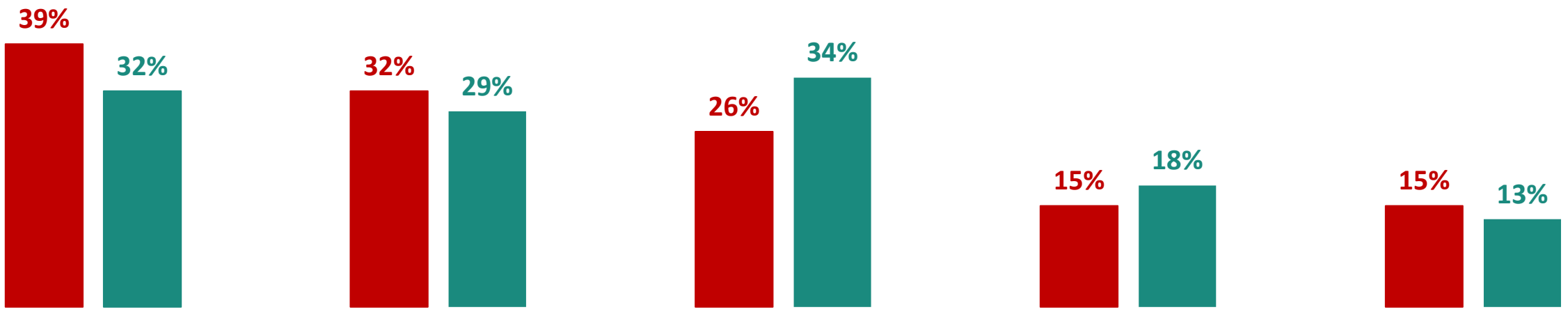


Eating & Drinking Habits (iii) – ES vs. IE

Validators

Coronavirus COVID-19

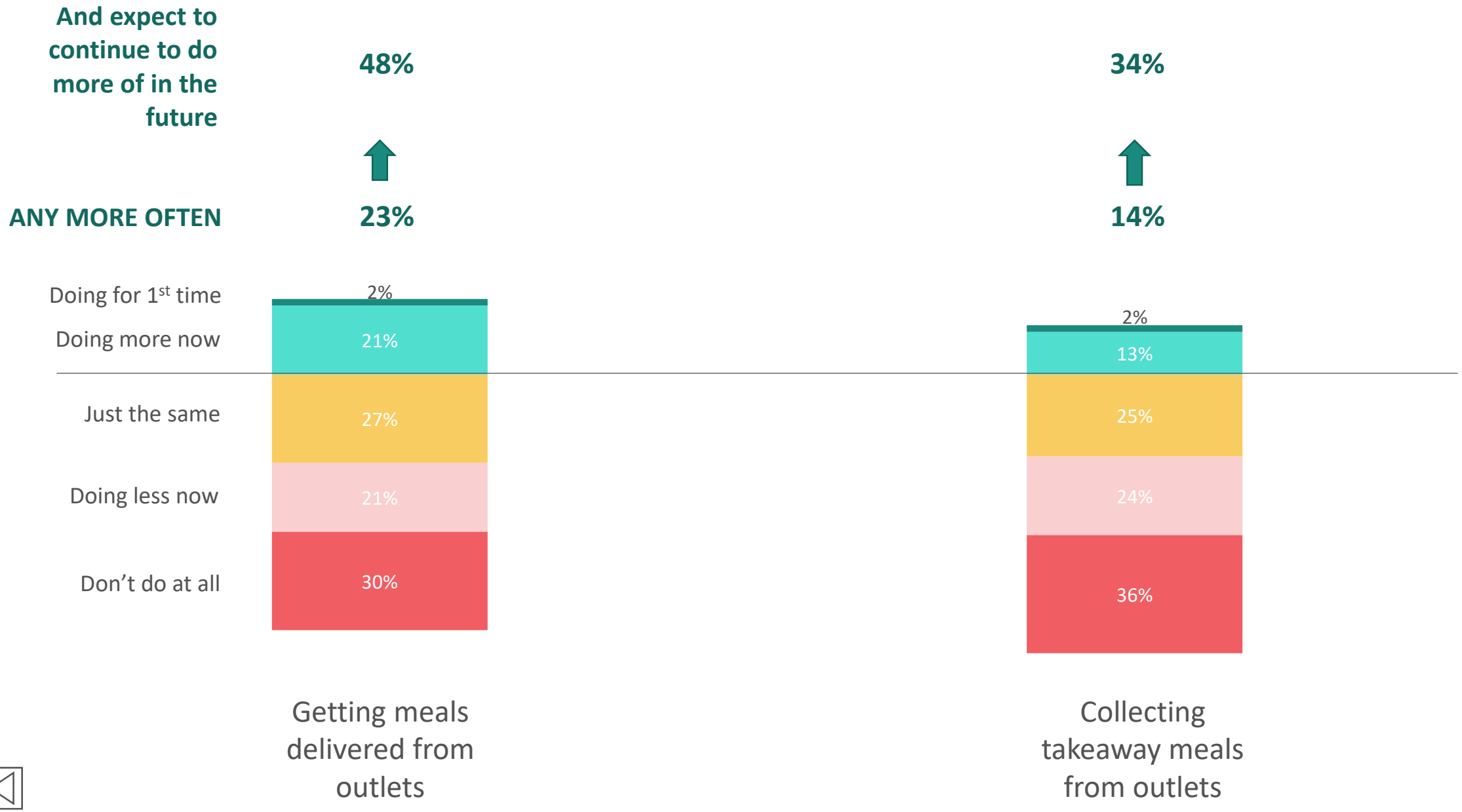
PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Eating & Drinking Habits (iv) – Food Service

Validators

Coronavirus COVID-19

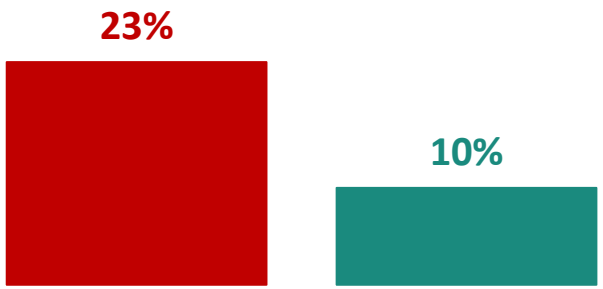


Eating & Drinking Habits (iv) – ES vs. IE

Validators

Coronavirus COVID-19

PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19



Getting meals delivered from outlets

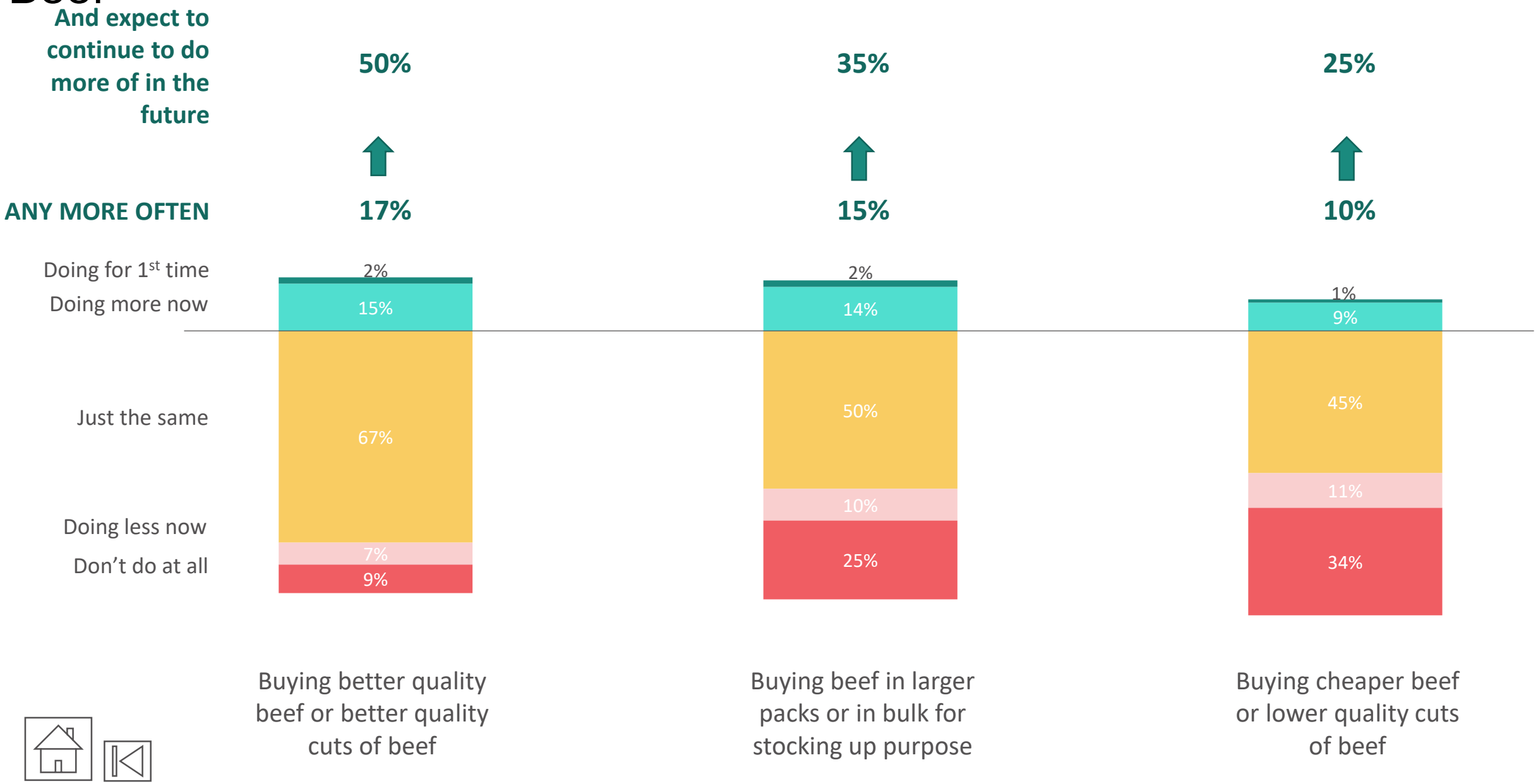


Collecting takeaway meals from outlets

Eating & Drinking Habits (v) Beef

Validators

Coronavirus COVID-19

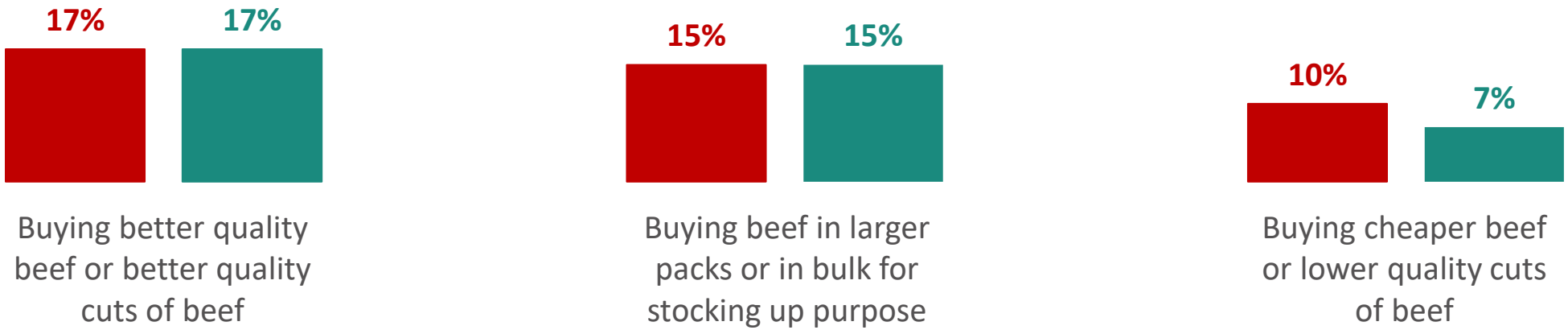


Eating & Drinking Habits (v) – ES vs. IE

Validators

Coronavirus COVID-19

PROPORTION OF TOTAL ADULTS DOING THIS MORE OFTEN AS A RESULT OF COVID-19

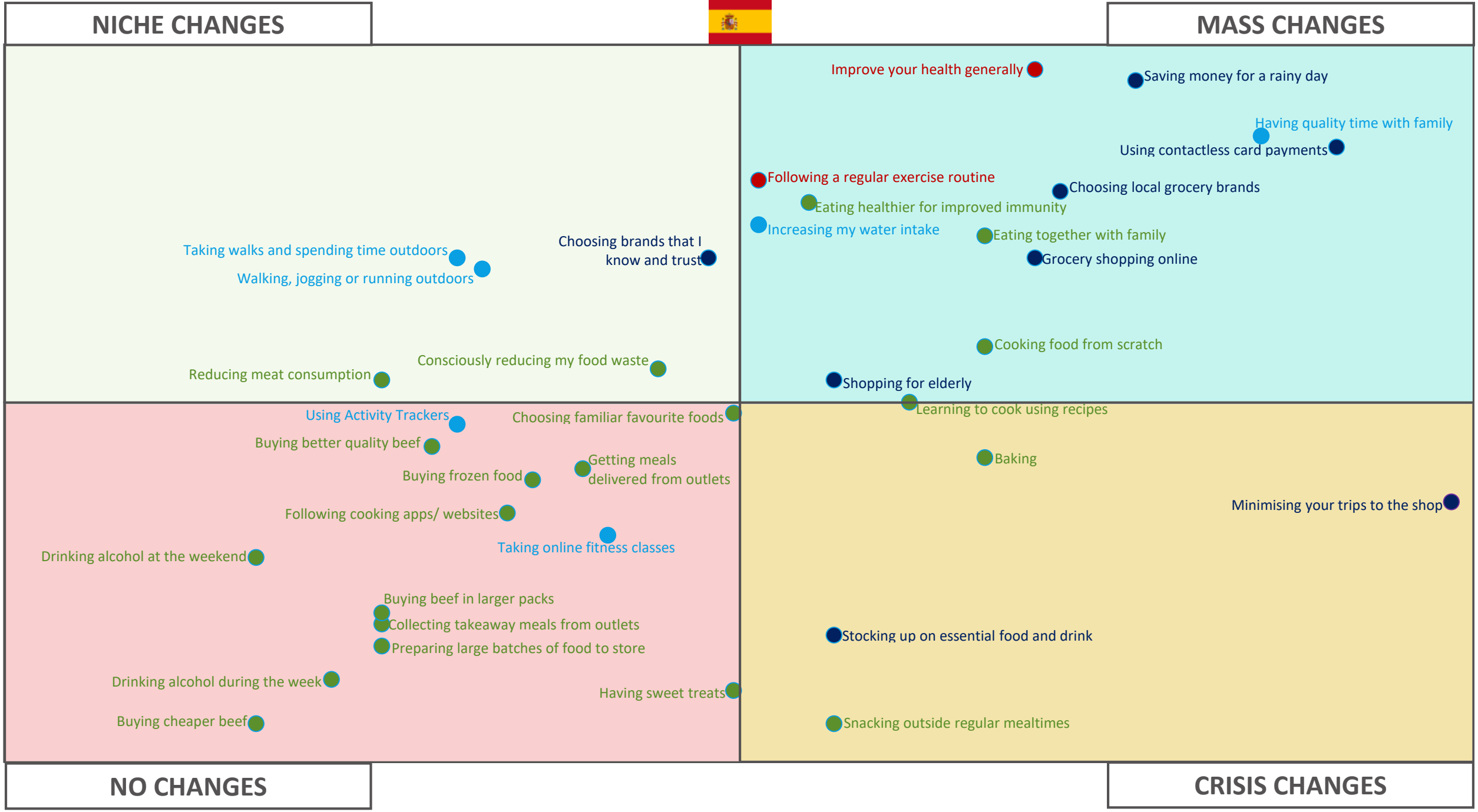


Eating & Drinking Habits

Validators

Coronavirus COVID-19




NICHE CHANGES
MASS CHANGES
NO CHANGES
CRISIS CHANGES
Improve your health generally
Saving money for a rainy day
Having quality time with family
Using contactless card payments
Following a regular exercise routine
Choosing local grocery brands
Eating healthier for improved immunity
Increasing my water intake
Eating together with family
Grocery shopping online
Taking walks and spending time outdoors
Walking, jogging or running outdoors
Choosing brands that I know and trust
Cooking food from scratch
Consciously reducing my food waste
Reducing meat consumption
Shopping for elderly
Learning to cook using recipes
Using Activity Trackers
Choosing familiar favourite foods
Buying better quality beef
Baking
Getting meals delivered from outlets
Buying frozen food
Minimising your trips to the shop
Following cooking apps/ websites
Taking online fitness classes
Drinking alcohol at the weekend
Buying beef in larger packs
Collecting takeaway meals from outlets
Stocking up on essential food and drink
Preparing large batches of food to store
Drinking alcohol during the week
Having sweet treats
Buying cheaper beef
Snacking outside regular mealtimes
Money & Shopping
Family Life
Health & Wellness
Eating & Drinking

Seafood Related Behaviour- ES

Validators

Coronavirus COVID-19

COOKING FISH/ SEAFOOD/ SHELLFISH



Overall Covid-19 has shown a notable increase in cooking fish/ seafood/ shellfish among Spanish adults with 16% cooking it more often as a result and the majority of these recent adopters likely to continue this behaviour post pandemic. Even more adults have been cooking it for its health benefits (19%) – again the vast majority likely to continue this behaviour in the future.

BUYING FISH/ SEAFOOD



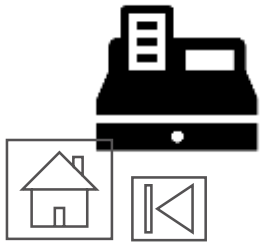
Buying more locally sourced fish/ seafood is being done by 18% of Spanish adults (vast majority of these expect to continue doing so post pandemic). However as many adults are buying frozen and pre-packed fish/ seafood less often as more often now as a result of the Covid-19 situation.

BUYING SHELLFISH



Buying more locally sourced shellfish is being done by over 1 in 10 (13%) of Spanish adults (over half of these also expect to continue doing so post pandemic). However buying frozen and pre-packed shellfish is being done less often than more often now as a result of the Covid-19 situation.

GENERAL BUYING BEHAVIOUR

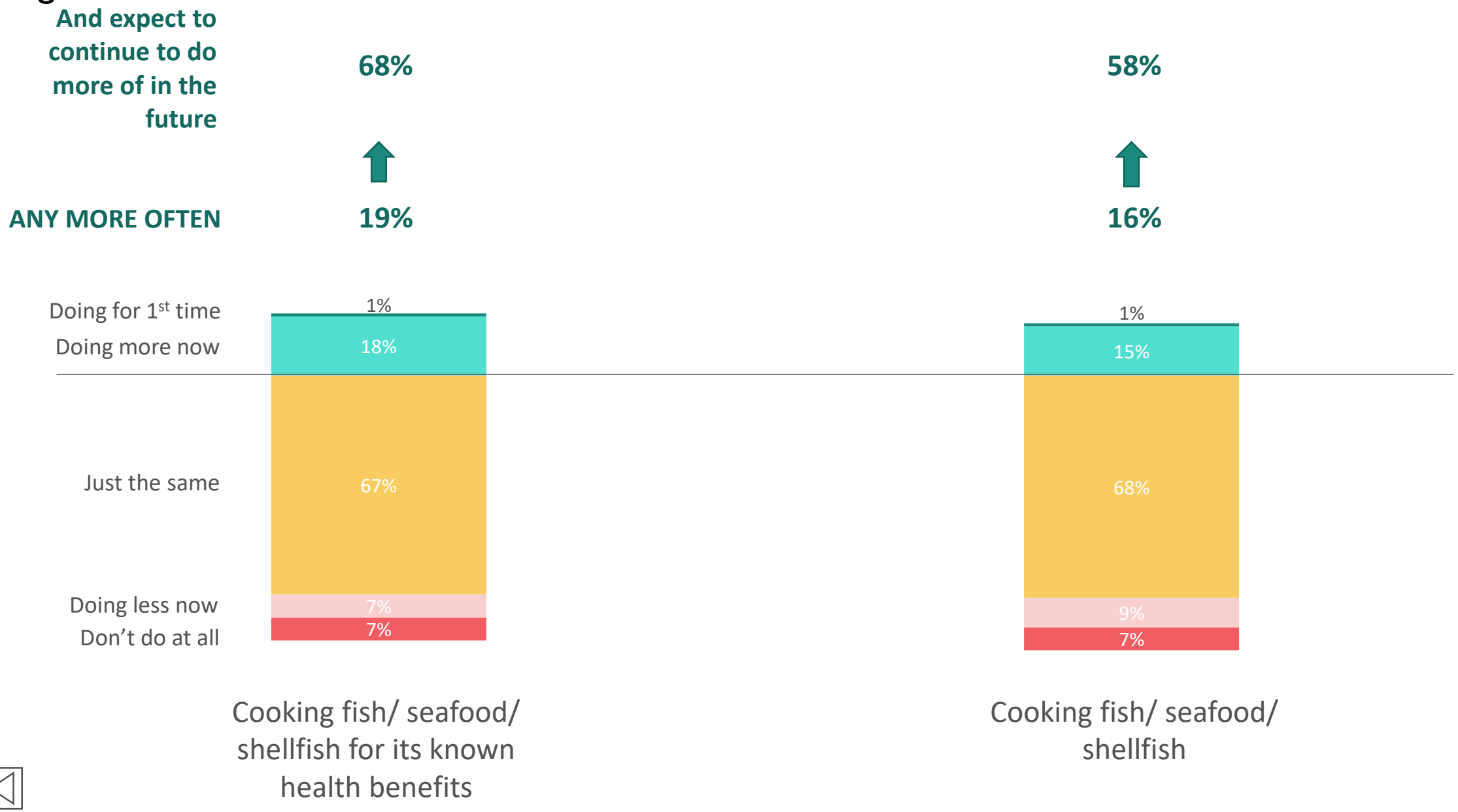


Buying better quality fish/ seafood/ shellfish appears much more prevalent among Spanish adults than buying cheaper (15% are buying better quality more often compared to 8% buying cheaper options more often). Signs also exist that shoppers are buying more from certified sustainable fisheries at this time – indicative among 14% of adults.

Fish/ Seafood/ Shellfish (i) – Cooking Behaviour

Validators

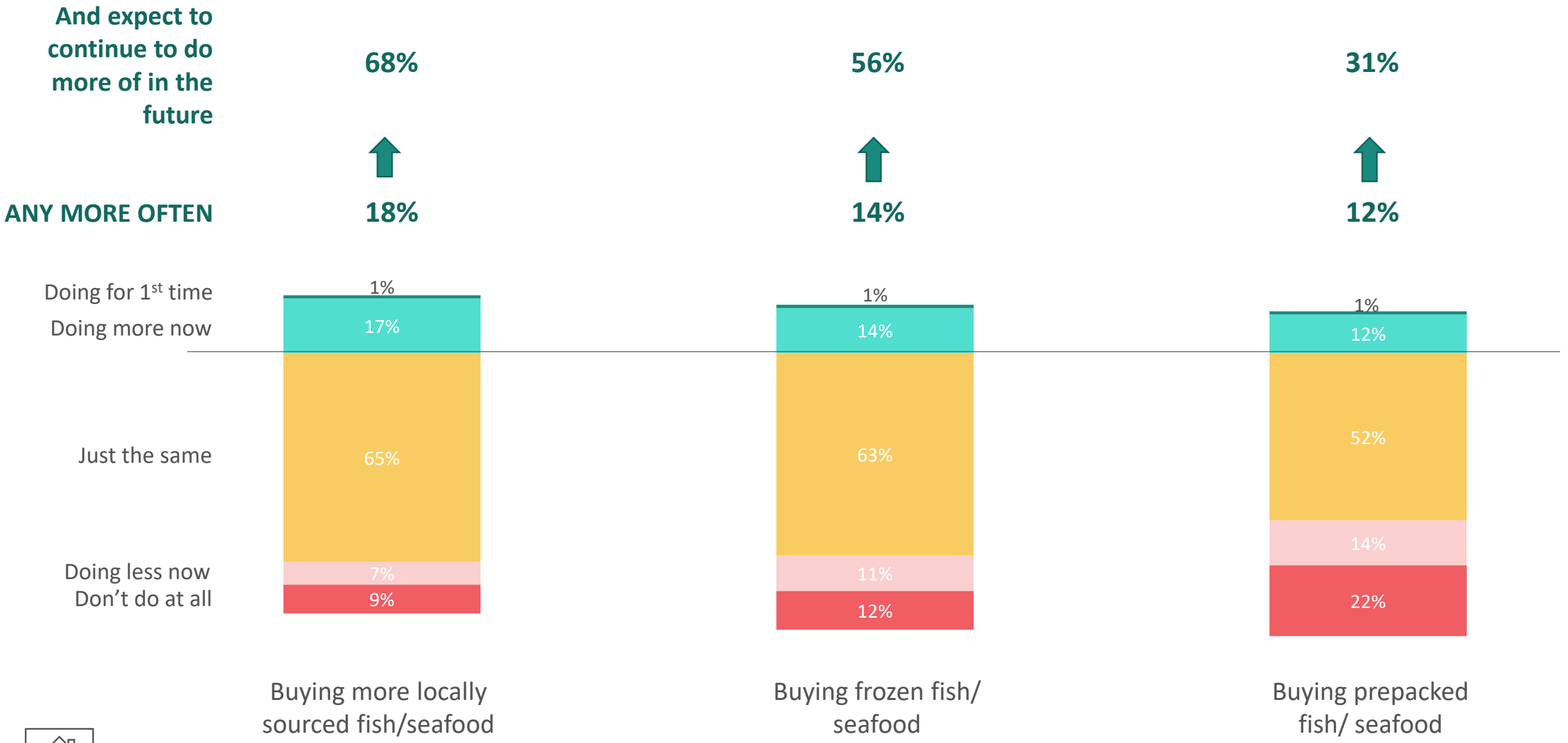
Coronavirus COVID-19



Buying Fish/ Seafood Type

Validators

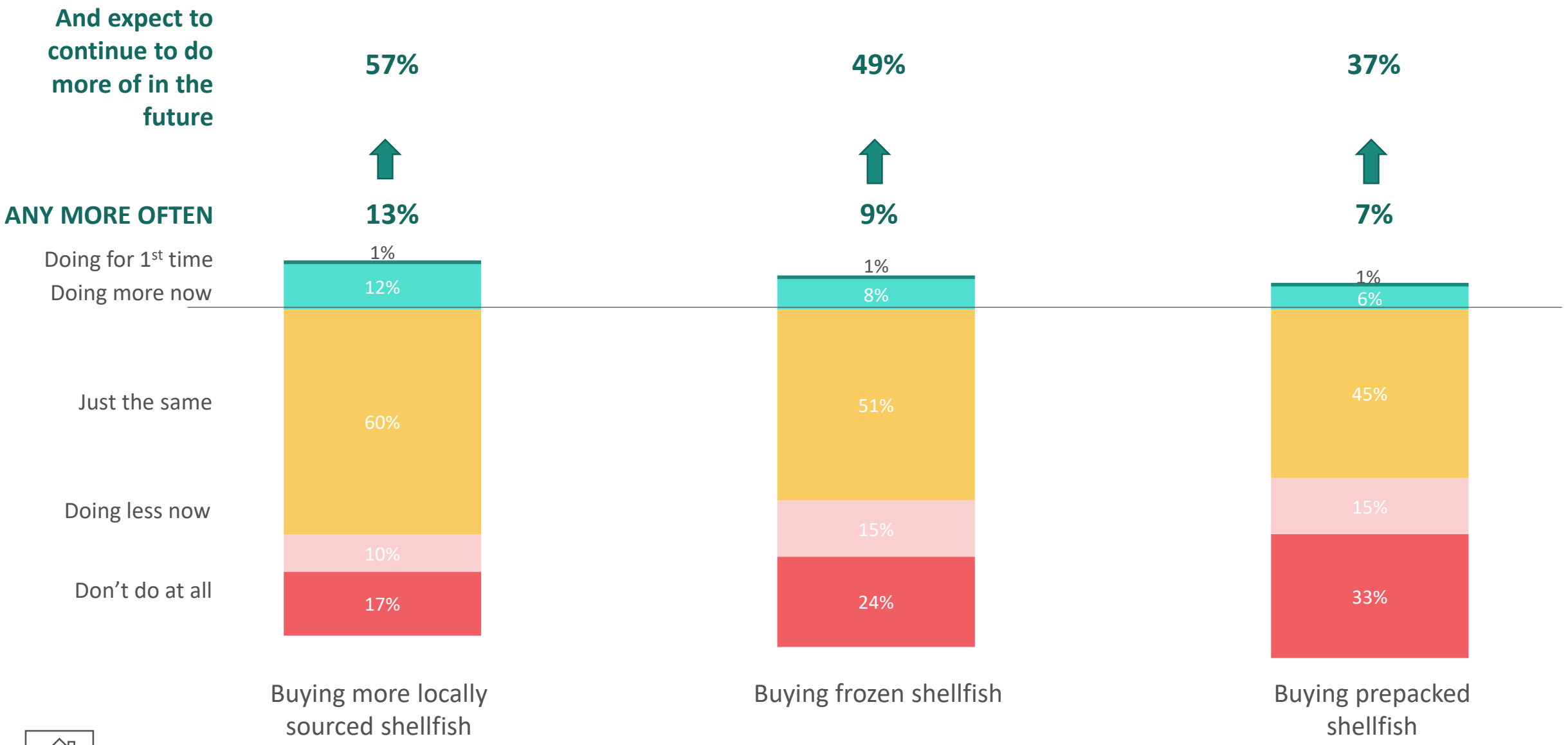
Coronavirus COVID-19



Buying Shellfish Type

Validators

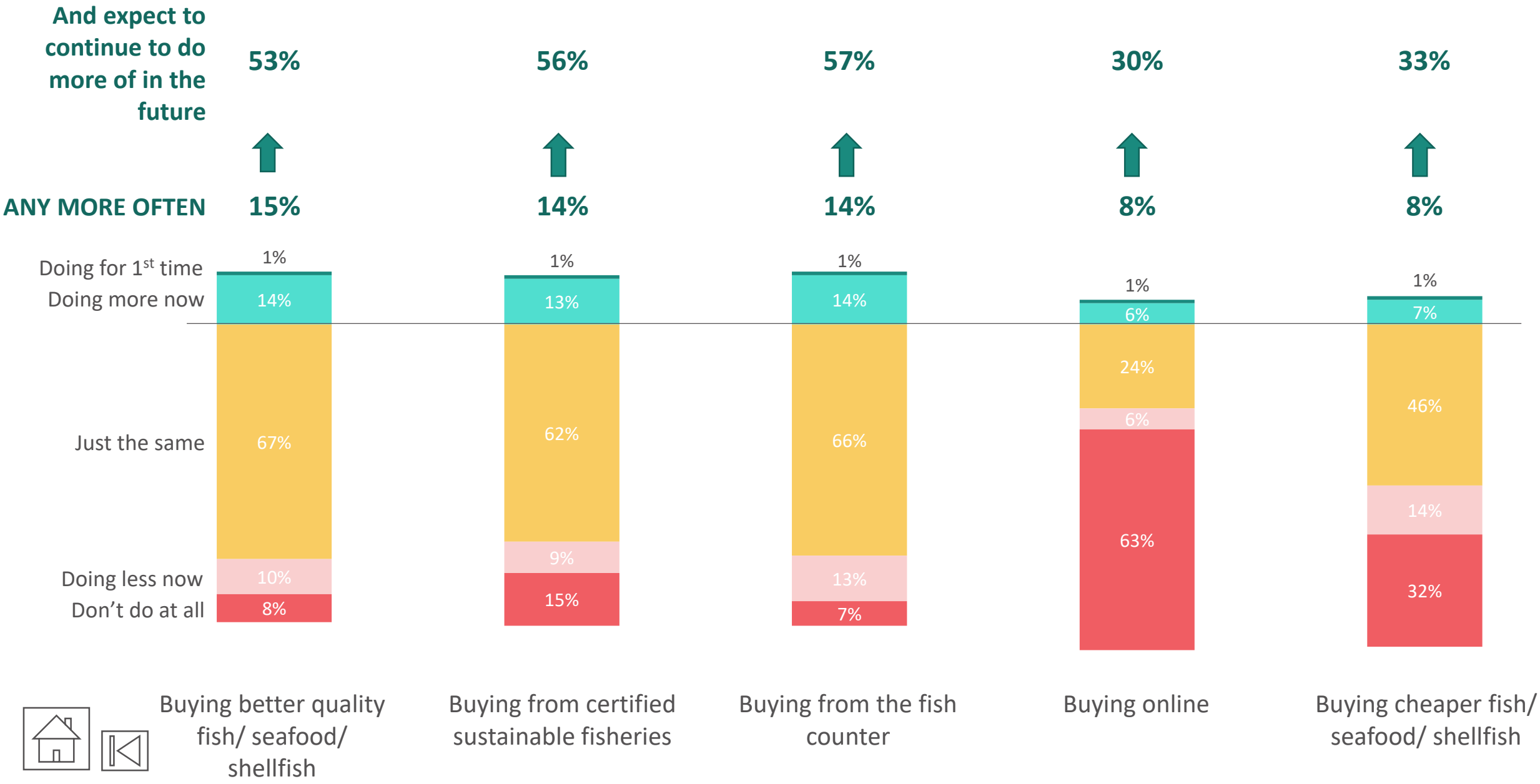
Coronavirus COVID-19



Fish/ Seafood/ Shellfish Buying Behaviour

Validators

Coronavirus COVID-19



Fish/ Seafood/ Shellfish

Validators

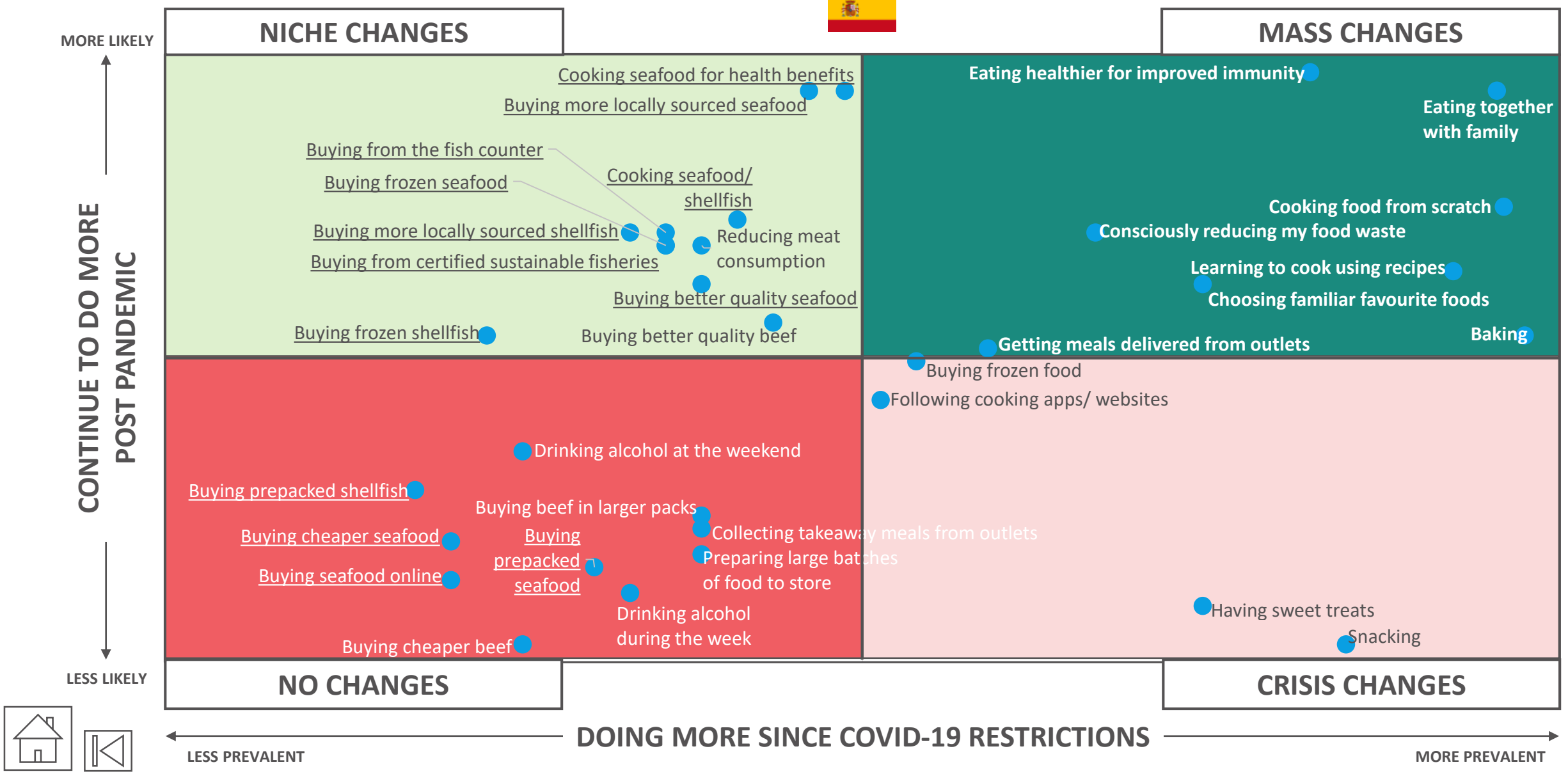
Coronavirus COVID-19



Eating & Drinking Habits (including Seafood)

Validators

Coronavirus COVID-19




NICHE CHANGES
MASS CHANGES
NO CHANGES
CRISIS CHANGES
Improve health generally
Saving money - rainy day
Having quality time with family
Using contactless card payments
Following regular exercise routine
Choosing local grocery brands
Eating healthier improved immunity
Increasing my water intake
Eating together with family
Choosing brands I trust
Grocery shopping online
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Walking, jogging or running outdoors
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Using Activity Trackers
Choosing familiar favourite foods
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Baking
Buying frozen food
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Drinking alcohol weekend
Buying prepacked shellfish
Buying beef in larger packs
Collecting takeaways
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Preparing large batches of food to store
Buying online
Drinking alcohol weekdays
Having sweet treats
Buying cheaper beef
Snacking
Money & Shopping
Family Life
Health & Wellness
Eating & Drinking
Seafood/ Shellfish

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







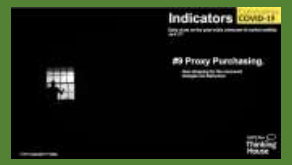




Shopping Behaviours









Consumption Behaviours

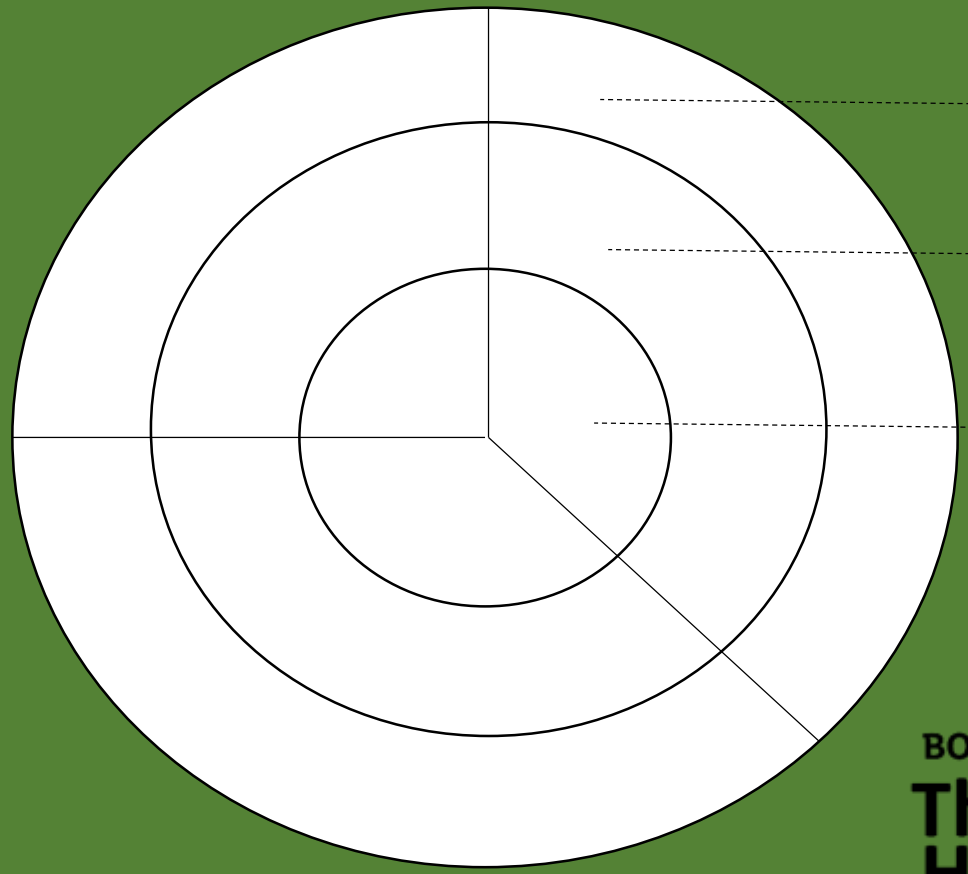












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Indicator Mapping Tool

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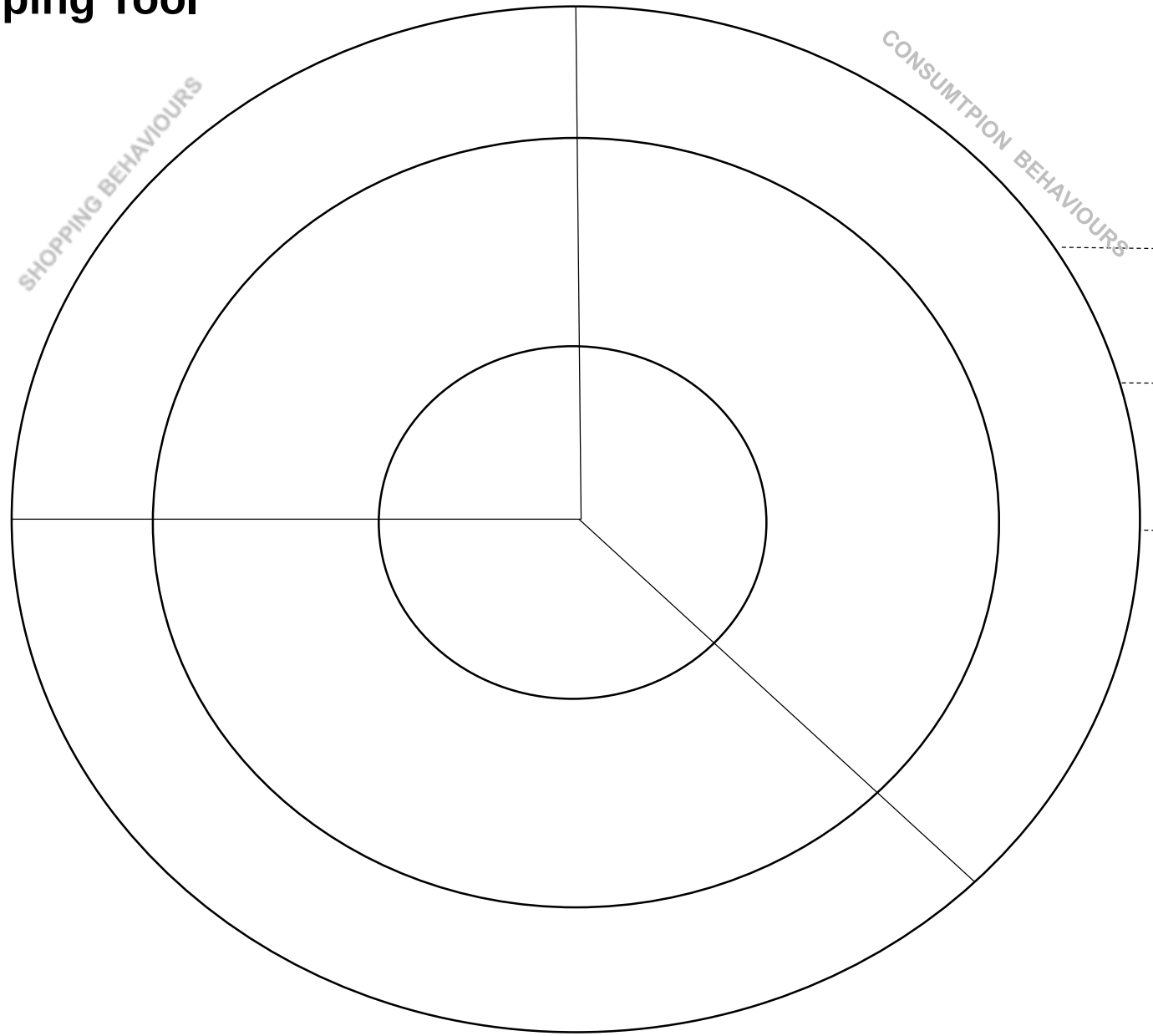

Low Impact Zone

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

Coronavirus COVID-19

PLAN

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

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

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

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

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3. Now & Next

Planners

Coronavirus COVID-19

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

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

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

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

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Now & Next Tool

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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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Coronavirus COVID-19

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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COVID-19

Future Proofing Toolkit

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