Coronavirus
COVID-19

Future Proofing Toolkit

GB Edition

200 Days On.

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…

BORD BIA
Thinking House

Coronavirus
COVID-19

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

BORD BIA
Thinking House

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



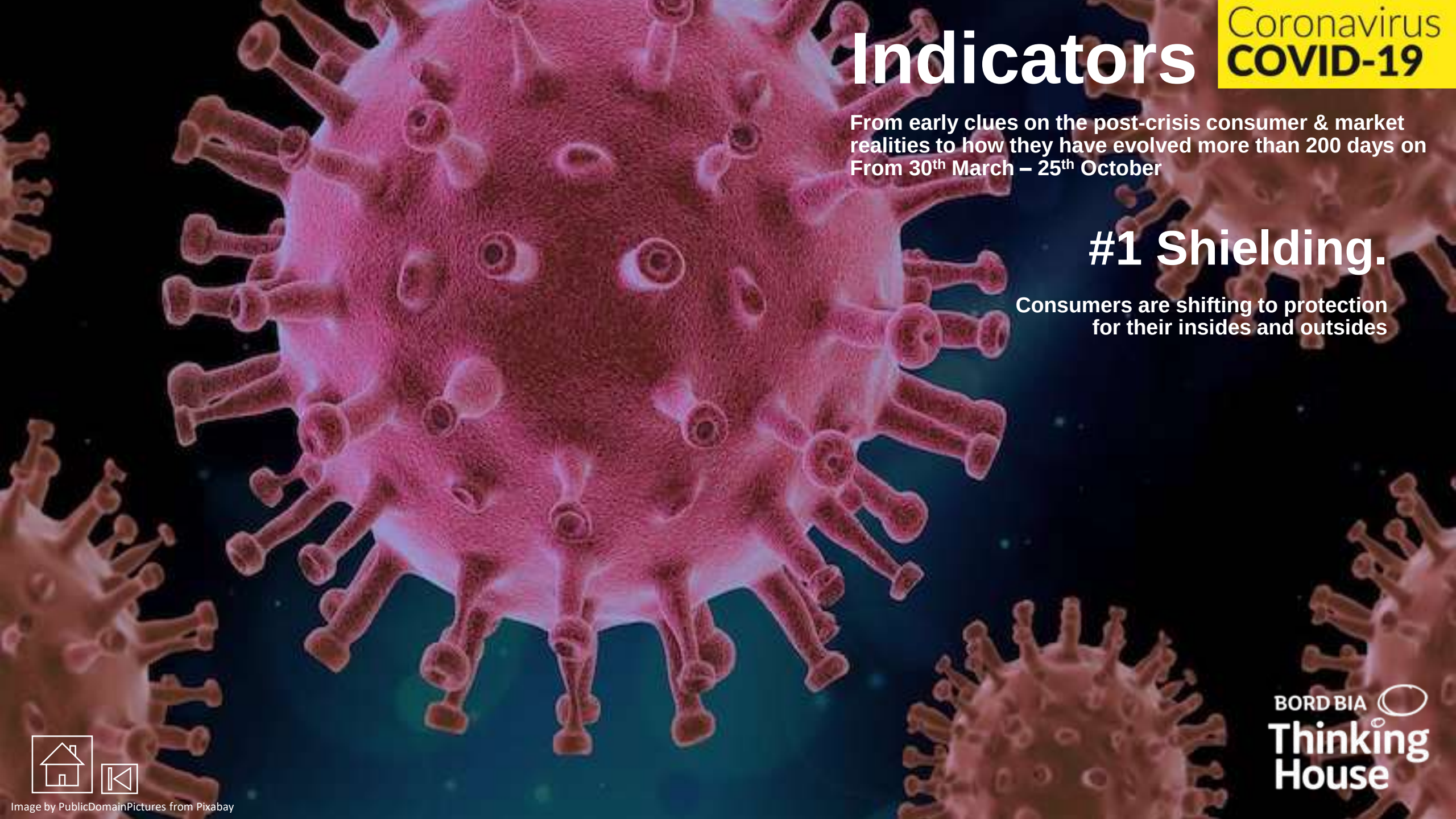








BORD BIA Thinking House



Indicators

Coronavirus COVID-19

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

#1 Shielding.

Consumers are shifting to protection for their insides and outsides

BORD BIA Thinking House

Image by PublicDomainPictures from Pixabay

#1 Shielding surges forward

It's all about immunity, as many people believe the virus is here for some time yet.

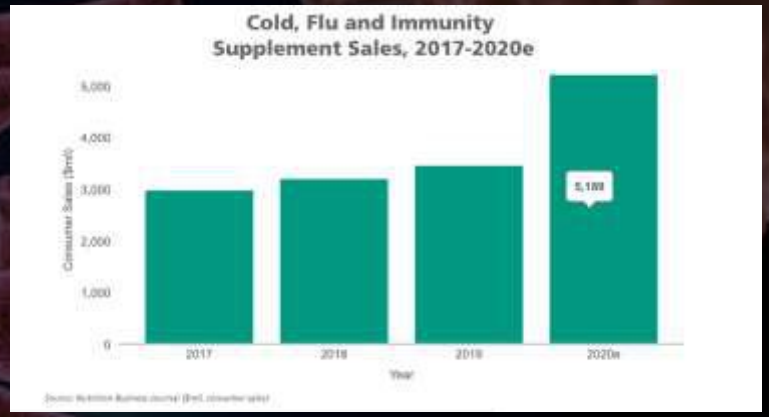
22%

are taking MORE supplements now to fend off Covid 19

BB Indicators Barometer, Oct 2020

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

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





BORD BIA Thinking House

#1 Shielding surges forward

People are also shielding more through the foods that they choose.

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

19%

Are choosing foods that boost immunity MORE now due to Covid 19

BB Indicators Barometer, Oct 2020



Daria Shevstova@pexels.com

THE INDICATOR

Eye Protection Claims

Will new innovations emerge?
Will protection claims emerge?

BORD BIA Thinking House

#1 Shielding specifics

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



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

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

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

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

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

BORD BIA Thinking House



Indicators

Coronavirus COVID-19

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

#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

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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

#2 Comfort Cooking.

Consumers are retrenching to familiar old favourites and forming new habits



BORD BIA Thinking House

Image by PublicDomainPictures from Pixabay

#2 Comfort In Cooking

Consumers are still retrenching to familiar old favourites and forming new habits with comfort cooking now up 4% since May.



Anna Guerrero @ pexels.com

19%

Are choosing MORE familiar favourite foods due to Covid 19

BB Indicators Barometer, Oct 2020

45%

Say the will continue to choose these familiar favourites post Covid 19

BB Indicators Barometer, Oct 2020

BORD BIA Thinking House

#2 Comfort In Cooking

With more than a quarter scratch cooking, there is a greater focus on ingredients and quality is a growing part of the familiar favourites we choose.



Anna Guerrero @ pexels.com

12%

Are choosing better quality beef plus 3% on May

BB Indicators Barometer,Oct 2020

26%

Are scratch cooking

BB Indicators Barometer, Oct 2020

BORD BIA Thinking House

#2 Comfort in cooking “creatively”

While much of the comfort cooking erred on the side of indulgence in the early phases, brands should consider enabling consumers embrace healthier versions of the classics, as health consciousness is taking hold

The food industry is coming under growing pressure with the rise in obesity rates and the impact it is having for Covid 19.

According to Food Navigator.com this is a position taken by a number of medics in the British Medical Journal (June 2020).

“The world is facing two pandemics. One immediately, Covid 19 and the other a longer term crisis with obesity” Feng He, professor of Global Health Research, Wolfson Institute of Preventative Medicine

Brands will need to help consumers embrace modern better for you comfort food.
Healthier versions of the classic and familiar.



http://cheesorizo.com/

These Cheeseorizo products were created by a vegetarian who wanted the great taste of Chorizo sausage but are made with a tasty combination of cheeses! Great to replace the familiar and for those who want to manage their meat intake.

Lisa Fotios
www.pexels.com

BORD BIA
Thinking House

Indicators

Coronavirus
COVID-19

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

#2 Comfort Cooking.

Early Implications for Irish Food & Beverages

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



BORD BIA
Thinking House

Indicators

Coronavirus COVID-19

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



#3 Simply Safe.

Consumers are looking for security in simplicity, transparency and familiarity

BORD BIA Thinking House

Image by PublicDomainPictures from Pixabay

#3 Simply Safer

Personal safety has become a part of the daily ritual.



BORD BIA Thinking House

#3 Simply Safer

Food Safety is playing a role of growing importance for consumers and will likely play a key part of any food and/or retail proposition going forward.



Anna Shvets @ pexels.com

44%

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

Bord Bia Indicators Barometer, Oct 2020

24%

of UK adults are choosing their supermarket MORESO on their safety than they did before

Bord Bia Indicators Barometer, Oct 2020

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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



#3 Simply Safe.

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

BORD BIA Thinking House

Image by PublicDomainPictures from Pixabay

Indicators

Coronavirus COVID-19

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



#4 Trace Tech.

Consumers are sharing their data in new ways

BORD BIA Thinking House

Image by PublicDomainPictures from Pixabay

#4 Trace Tech

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

23%

are choosing local grocery brands MORE now because of Covid

Bord Bia Indicators Barometer, Oct 2020



BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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

#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**

BORD BIA Thinking House

Image by PublicDomainPictures from Pixabay



Indicators

Coronavirus COVID-19

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

#5 The New Social.

Consumers are embracing technology to fight social distancing.

BORD BIA Thinking House

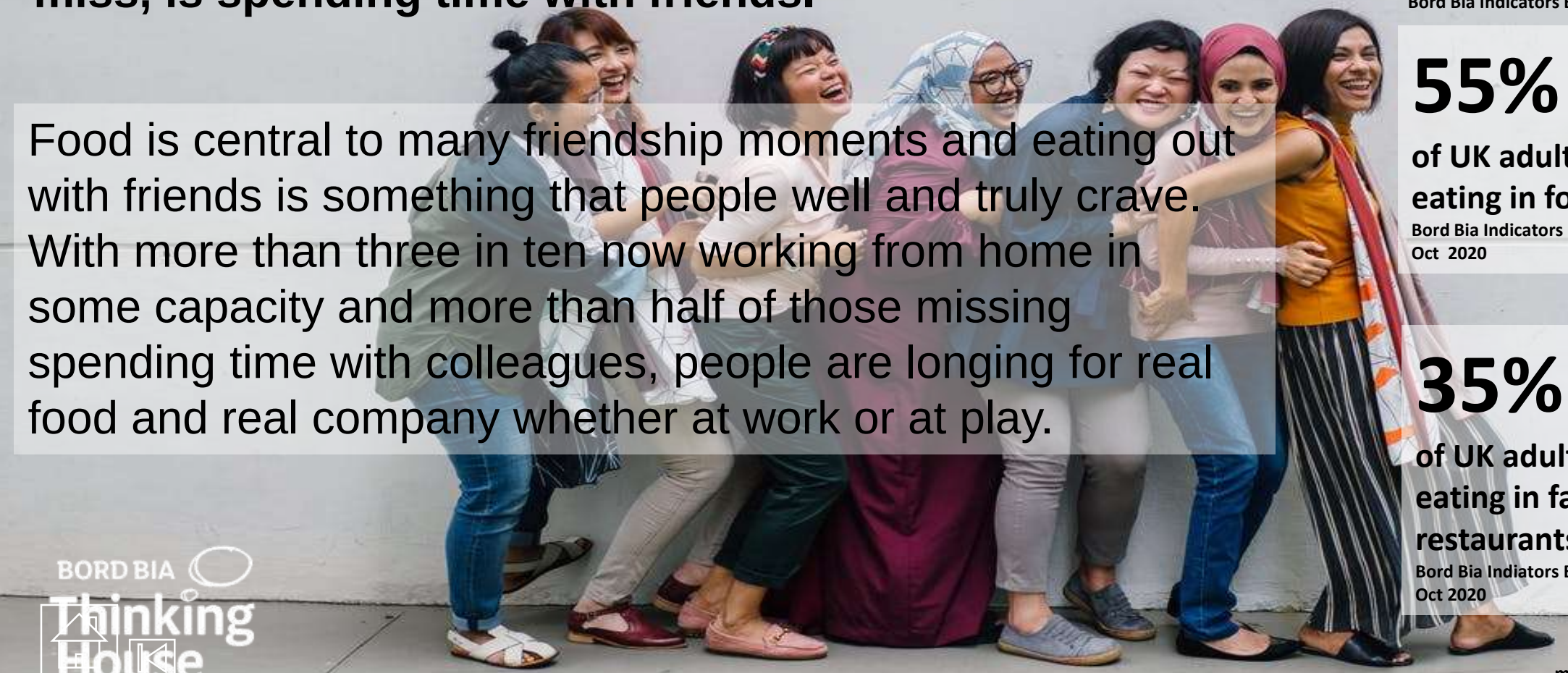
Photo by Sergey Zolkin on Unsplash

#5 The New Social

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

77%

TOP THING PEOPLE MISS is spending time with friends
Bord Bia Indicators Barometer, Oct 2020



Food is central to many friendship moments and eating out with friends is something that people well and truly crave. With more than three in ten now working from home in some capacity and more than half of those missing spending time with colleagues, people are longing for real food and real company whether at work or at play.

55%

of UK adults miss out on eating in formal restaurants
Bord Bia Indicators Barometer.
Oct 2020

35%

of UK adults miss out on eating in fast food restaurants
Bord Bia Indiators Barometer,
Oct 2020

BORD BIA Thinking House

mentatdgt@pexels.com

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

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

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

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

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

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



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

meghanholmes@unsplash.com

#5 The New Social: *Working out* from home no more

Going to the gym is now an engrained part of our culture and important for self worth, it doesn't quite translate online, given our personal need to demonstrate success.

While online fitness took off during Covid 19 and we had the Joe Wicks phenomenon, people embraced the reopening of gyms across the world once more. Even before gyms reopened, "exercise speakeasies" emerged stateside and where people could exercise outside, many makeshift open air gym sessions took place.

The closing of gyms and fitness classes only served to highlight how everyone actually likes going to their gyms, according to Amanda Pull (The Atlantic, Sept 2020) and so even if some concerns remain about their safety, given the nature of its pump and sweat environs, people are as eager to get back to the gym as to restaurants and bars…so what is the appeal?

"We live in a culture in which being industrious is highly valorised. Many people want to be perceived as people who value exercise, because it shows they're committed to self-improvement, and to hard work. Above and beyond movement itself, part of the satisfaction of gym-going comes from performing those values around other people who share them, and from achieving what that community regards as success"

Prof Natalia Melham Pertrzela, NYC, The Atlantic

12%

Online fitness classes more now since Covid which is down 3% vs May 2020

Bord Bia Indicators Barometer

BORD BIA Thinking House

#5 The New Social

The Show Must Go On: HOWEVER, instore virtual "shopping" entertainment is likely something we will see more of..Asics success of going virtual during lockdown has made them consider bringing the virtual store at home

To coincide with the Olympics, Asics were due to launch a new range of runners to the media.

With the cancellation of the Olympics and no press launches, Asics went virtual creating their own innovation lab for the lock down launch.

The experience required the wearing of a VR headset. Users were invited to participate in exercises that emphasised the shoe's features…

Asics is now considering bringing this experience into their retail outlets to create an enhanced customer involvement in store.



www.stylus.com

11%

Of Japanese consumers are engaging with robots and automated solutions to avoid human contact

Bord Bia Indicators Barometer

73%

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

Euromonitor International Lifestyle Surveys 2019

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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

#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'**
- **Consumers may expect more entertainment from shopping**

BORD BIA Thinking House

Photo by Sergey Zolkin on Unsplash



Indicators

Coronavirus COVID-19

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

#6 Stocking-In.

How grocery shopping evolves from panic to preparedness.

BORD BIA Thinking House

Image by Alexas_Fotos from Pixabay

#6 Stockpiling surges once more

With second waves happening across many countries, a rolling stockpile is becoming a part of life.

According to IGD UK, reports of some shoppers purchasing extra products due to fears of a second national lockdown has seen Morrisons, Tesco and Aldi reintroducing rationing on some products.

Over the weekend (25-27th September) there was a significant increase in claimed stockpiling to 47% from 39% recorded a few days earlier. In the UK, claimed stockpiling is highest amongst younger adults (<35's) and those with children, as well those living in London.

Interestingly, according to bbc.com, freezer sales jumped 200% on last year, in March alone. Improved storage suggests the likelihood that we will see more emphasis on stockpiling/bulk buying behaviours in the future.

BORD BIA Thinking House



#6 Stockpiling surges once more

The pandemic pantry is full once more with tinned foods and carbs, however perhaps the panic on toilet paper has abated..

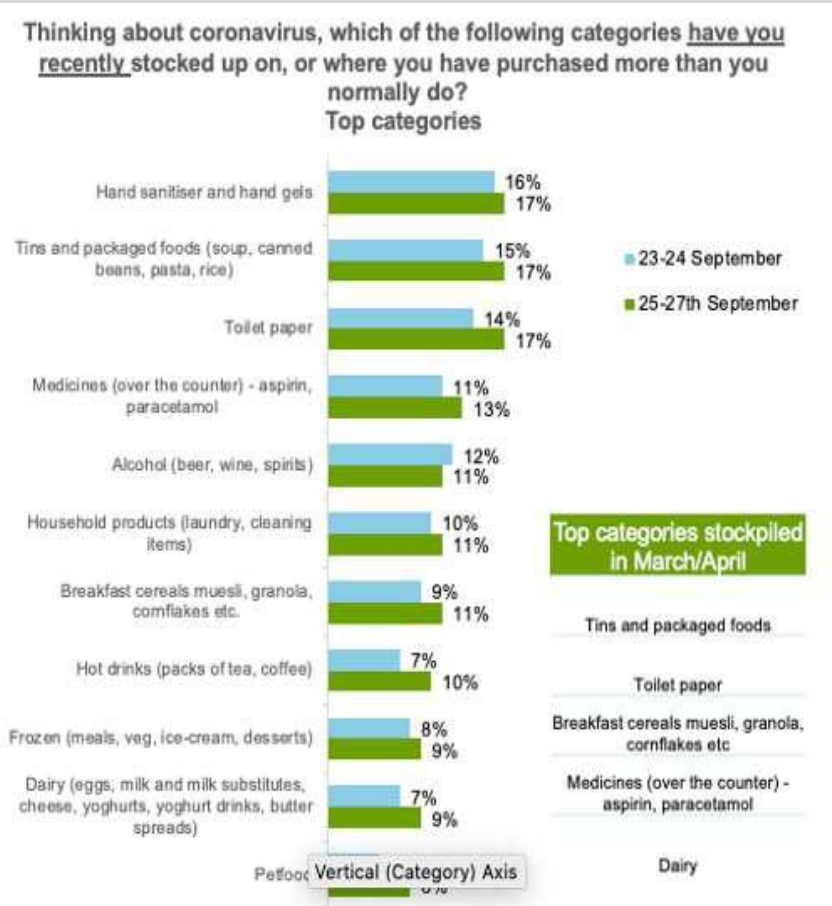
Claimed stockpiling is highest for hand sanitiser and tins and packaged goods

In September, comparing the weekend data with the data recorded at the end of the week, the top three categories that shoppers claim to have stockpiled remain consistent; hand santisers, tins/packaged goods and toilet roll.

Hand sanitisers and hand gels ranked in 10th place on average through March and April but appear in the top three in September. Whereas, tins and packaged foods along with toilet paper remain in the top three categories that shoppers have stockpiled up on.

With similar products being stockpiled now compared to in March/April, retailers and manufacturers should be in a better position to develop strategies based on past experience.

Consider how you will be able to meet higher volume requests for an extended period of time.





Indicators

Coronavirus COVID-19

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

#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 to manage scarcity
- Pricing opportunities to ‘nudge’ shopper behaviour
- Opportunities in frozen foods

BORD BIA Thinking House

Image by Steve Buissinne from Pixabay



Indicators

Coronavirus COVID-19

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

#7 Risky Business

Shoppers are shying away from produce on open display and touchable

BORD BIA Thinking House

Photo by EVG Photos at Pexels

#7 Risky Business

Strategies to minimise retail visits are becoming more prevalent.

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

Eight Co-op stores are now making this service available. Correspondingly, Co-op has seen the number of customers availing of this service more than double since the start of lockdown, with the value of transactions increasing four fold as shopping habits change. Shoppers order their products via an app. Their products are then picked in-store and packed in the robot after which they are delivered for a fee varying on the distance travelled (£1.49-£2.49).

56%

Of UK adults are minimising trips to the shops
Bord Bia Indicators Barometer, Oct 2020



IGD RetailAnalysis

BORD BIA Thinking House

#7 Risky Business

Anti viral technology may lead to lots of new innovations and present new anti viral packaging opportunities for food and drinks brands.

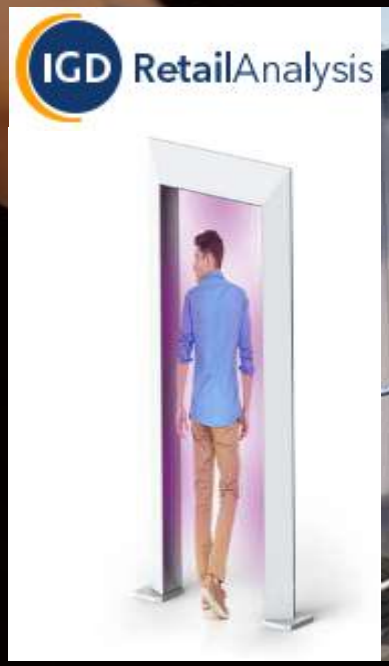
As touching of products remains an ongoing concern, we are likely to see more and more innovation in this space.

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

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

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







1 in 4

of UK adults say that it’s more important now that the food and drink they are buying is sealed and can't have been touched

Bord Bia Indicators Barometer

BORD BIA
Thinking House

#7 Risky business in the restaurant world

Restaurants are also starting to experiment with no contact strategies.



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

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

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

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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

#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
- Innovations in “robotic” retail and food service

Photo by Kate Remmer on Unsplash

BORD BIA Thinking House

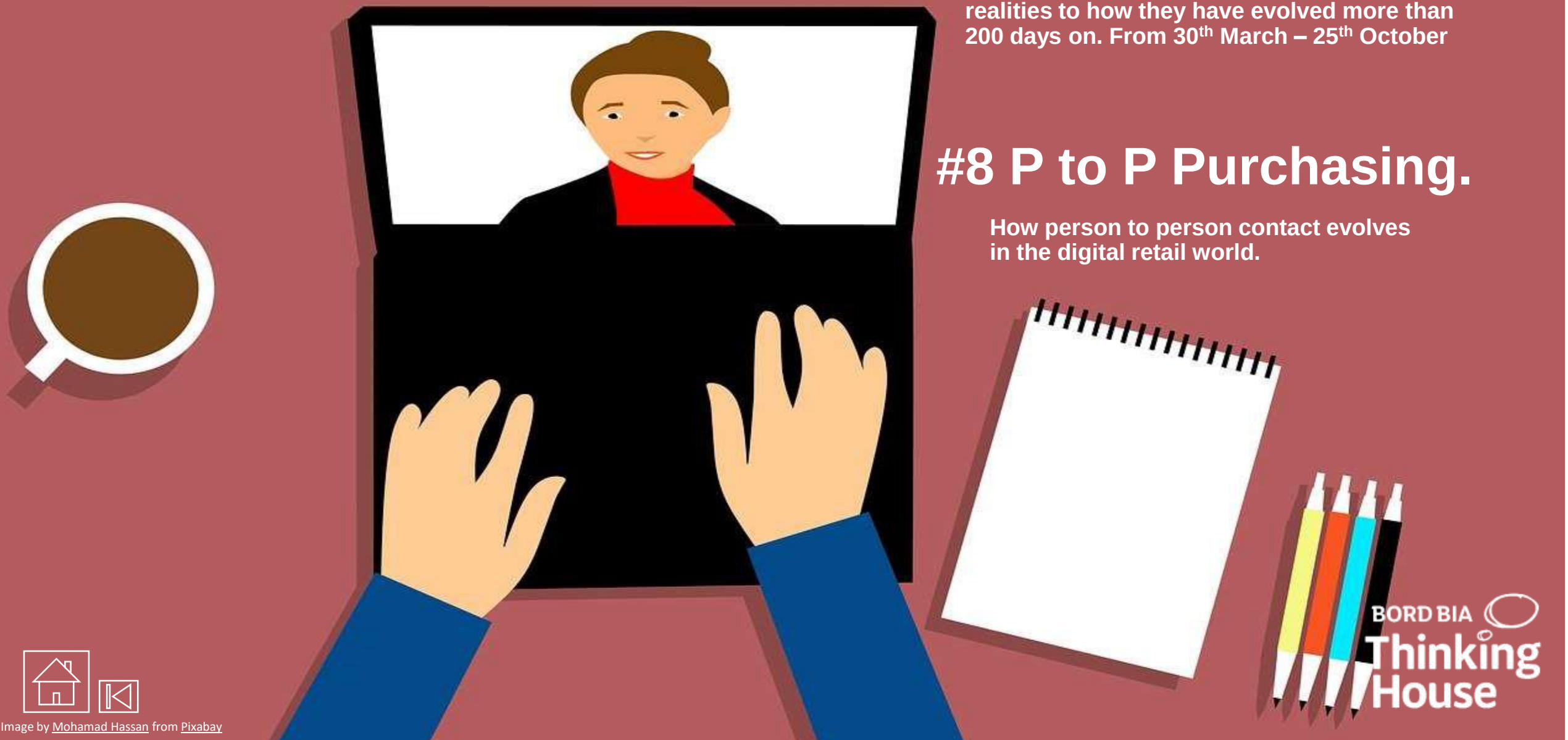
Indicators

Coronavirus COVID-19

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

#8 P to P Purchasing.

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

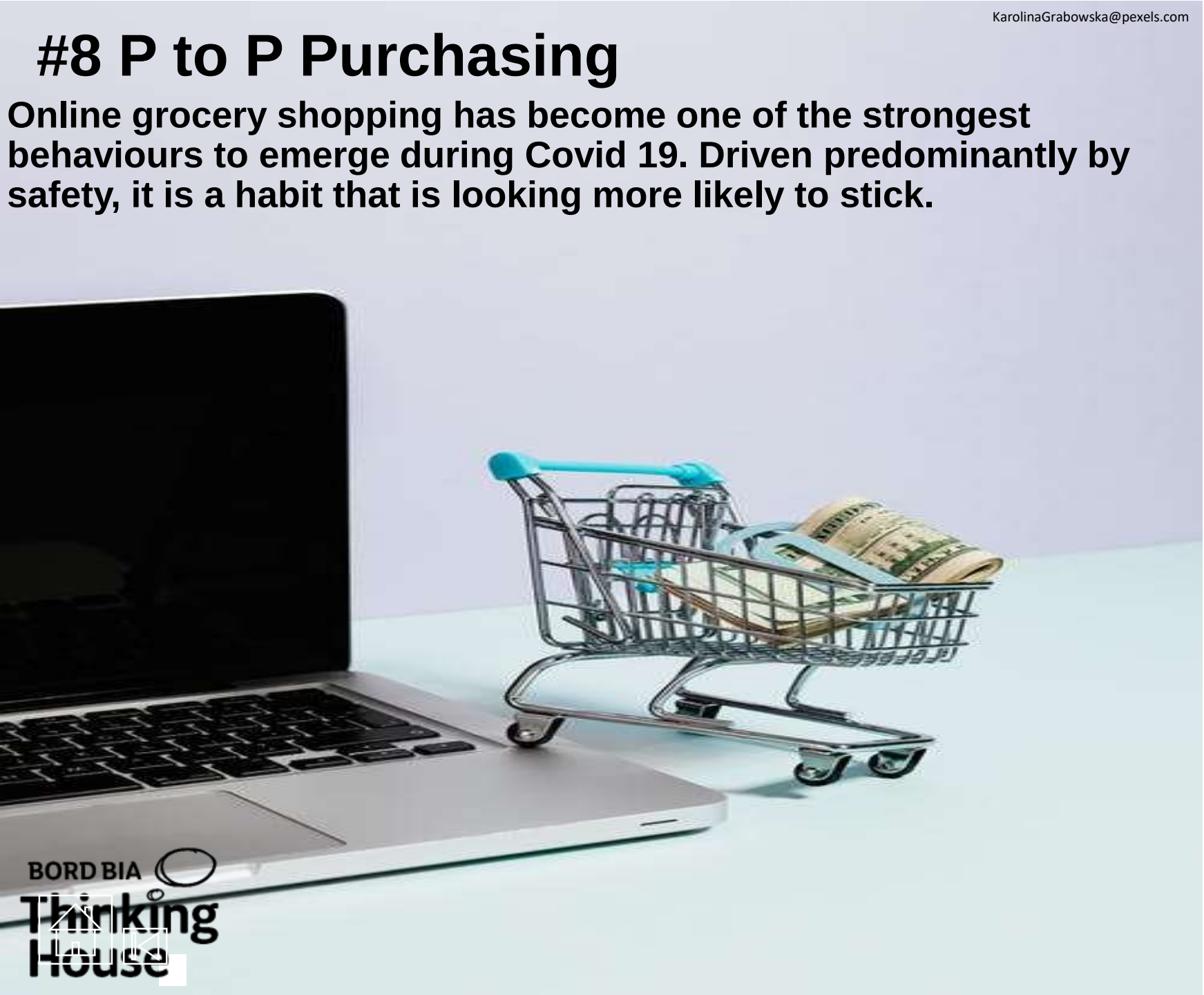


BORD BIA Thinking House

Image by Mohamad Hassan from Pixabay

#8 P to P Purchasing

Online grocery shopping has become one of the strongest behaviours to emerge during Covid 19. Driven predominantly by safety, it is a habit that is looking more likely to stick.



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

Nielsen puts the online share of the grocery market in the four weeks to 16th May at 13%. That's nearly double its share for the same time last year.

31%

of UK consumers are grocery shopping online more now + 4% vs May

Source: Bord Bia Indicators Barometer, Oct 2020

Of those shopping online more now,

7 in 10

expect to continue to do so post Covid 19

Source: Bord Bia Indicators Barometer, Oct 2020

#8 P to P Purchasing

With growing evidence of trialling and switching amongst online retailers, brands will need to get more savvy at their retention strategies.

Thank You for Shopping With us!

(online)

49%

of 25-34 UK adults are likely to have bought some food and grocery products or brands online that they would not normally buy.

Source: IGD Data

23%

of online shoppers claim they will try and use different online retailers

Source: IGD Data



PhotoMIXcompany@pexels.com

#8 P to P Purchasing

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

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

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

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

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



BORD BIA Thinking House

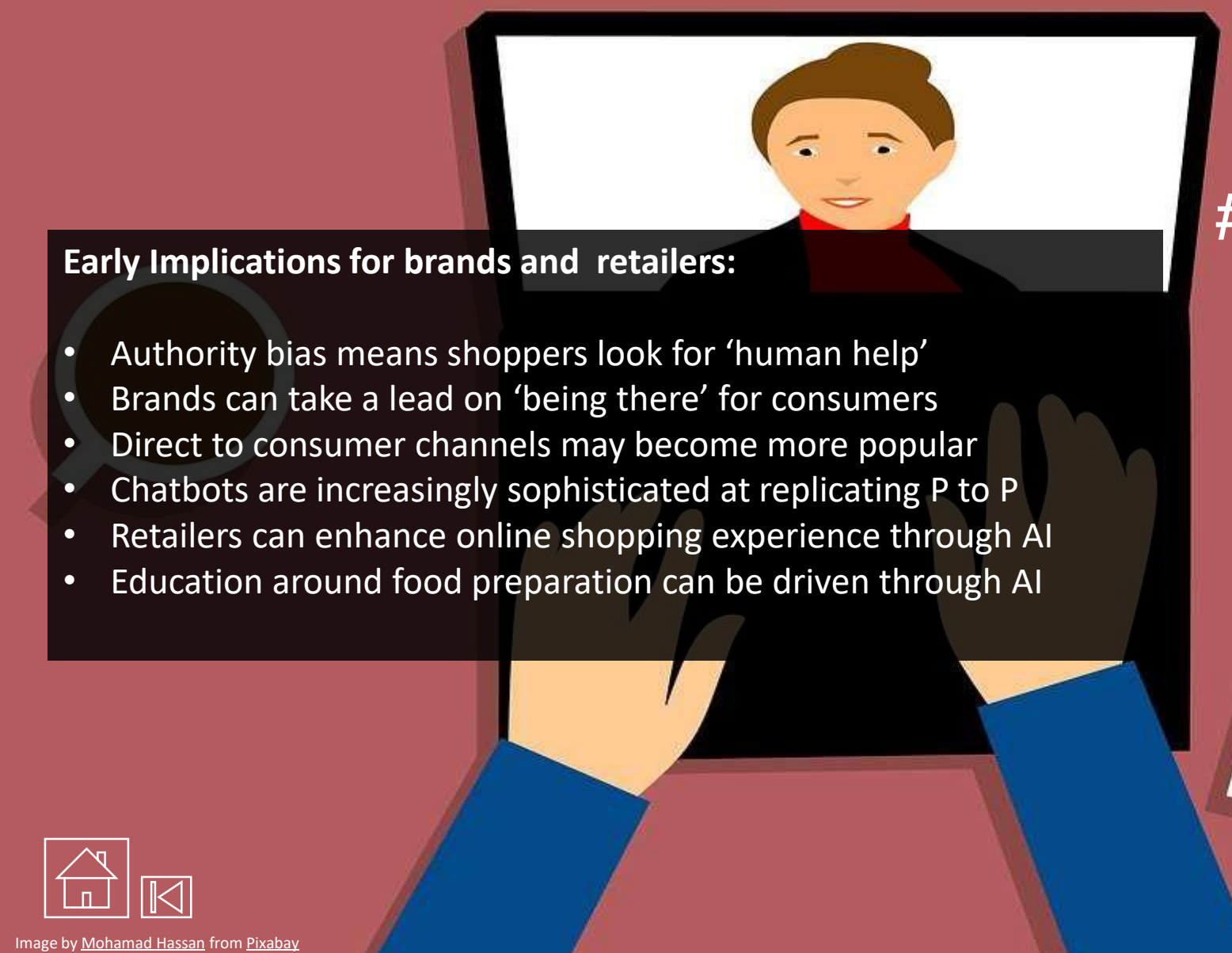
Indicators

Coronavirus COVID-19

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

#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





BORD BIA Thinking House

Image by Mohamad Hassan from Pixabay

Indicators

Coronavirus COVID-19

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

#9 Proxy Purchasing.

How shopping for the cocooned changes our behaviour.



Image by Jesse Yelin from Pexels

BORD BIA Thinking House

#9 Proxy Purchasing

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

More than 6 in 10 are avoiding contact with older friends and family - this has also probably driven the upward trend in moving on line.
Bord Bia Indicators Barometer, Oct 2020

According to IGD Data, nearly 2 in 10 people in the UK consciously gave up their own shopping slots to facilitate the elderly, especially for those, who may not have had the opportunity to have someone go and do their shopping for them. (IGD Data)

25%

Doing more shopping for an Older friend or family member -5% vs May 2020
Bord Bia Indicators Barometer, Oct 2020

The number of shoppers aged 65+ who claim to mainly shop online has more than doubled in May 2020 (24%) vs 9% in Feb 2020
(UK IGD Data, Sept 2020)

johnmoeses@unsplash.com

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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

#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’

BORD BIA Thinking House

Image by Jesse Yelin from Pexels

Indicators

Coronavirus COVID-19

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

#10 Mood Food.

How we are choosing food that make us feel good

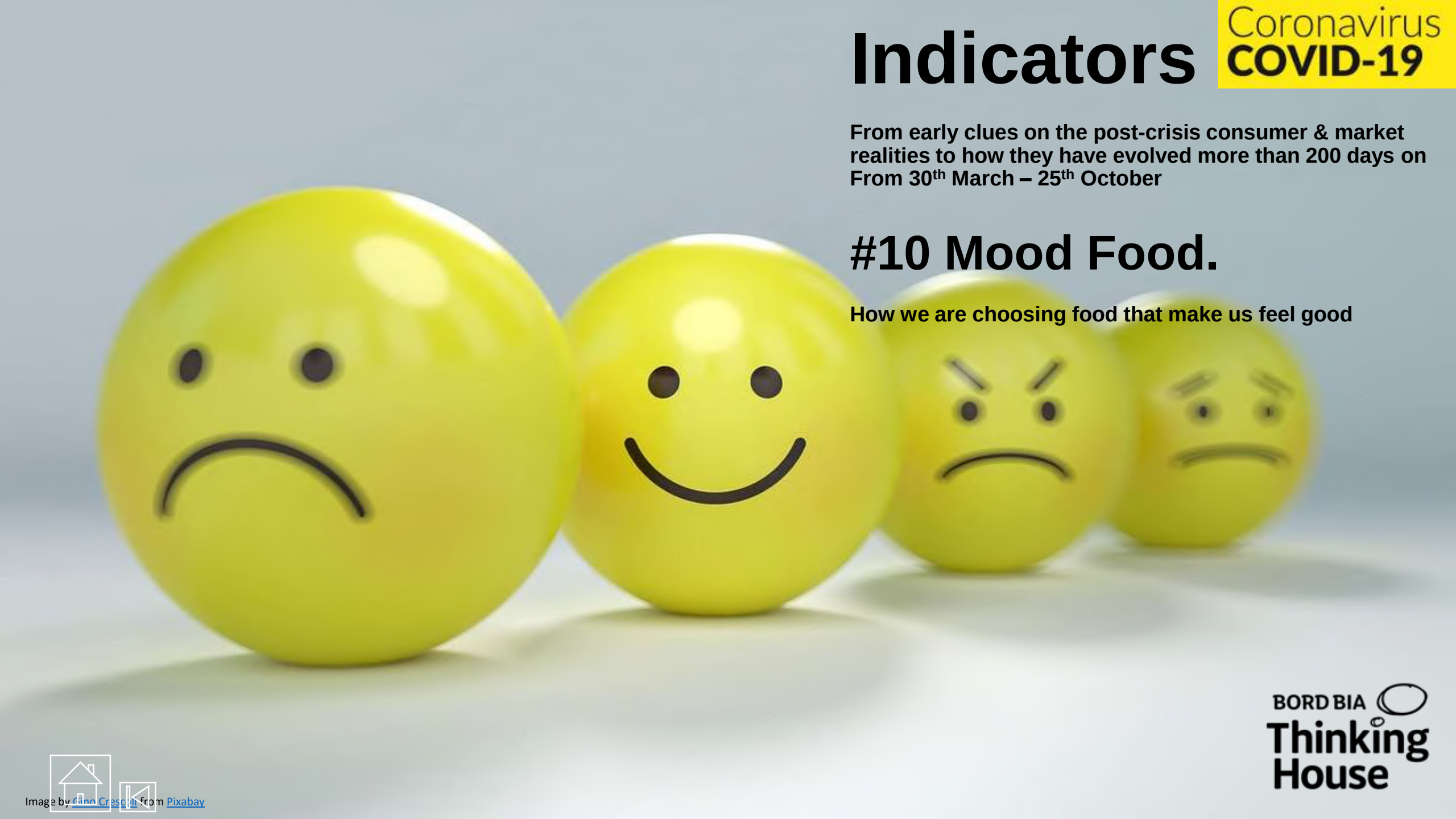


Image by Gino Crescoli from Pixabay

BORD BIA Thinking House

#10 Mood Food

A significant knock on to Covid 19 is the rise in anxiety levels. Health anxiety disorders are on the rise globally and coronavirus stress syndrome has become quite prevalent. The UK is no exception.

48%

Of UK adults are very or extremely concerned about the impact of Covid 19 on peoples mental health - up 4% since May

Bord Bia Indicators Barometer, Oct 2020

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



Elean Krina@pexels.com

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

Andrew Wardlaw, MMR

BORD BIA Thinking House

#10 Mood Food

Sweet treats are a “go to” for dealing with stress and were widely consumed in the early phases of Covid 19. While UK consumers are still enjoying them, there has been a drop off by 9% in consumption since May, as people try to adapt their habits to embrace healthier lifestyles.



29%
of UK adults are are trying to get more sleep and rest now due to Covid 19
Bord Bia Indicators Barometer, Oct 2020

72%
of UK adults expect to try to get more sleep and rest in the future post Covid 19
Bord Bia Indicators Barometer, Oct 2020

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

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

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

22%

Of UK adults are having more sweet treats since Covid 19 but this has fallen by 9% since May
Bord Bia Indicators Barometer, Oct 2020

BORD BIA Thinking House

#10 Mood Food

Hedonic consumption is still prevalent and snacking outside of mealtimes is still significant but has fallen back as people are trying to discipline themselves. This creates opportunities for brands to become more snackable. How can brands integrate function, form and fun?

Reimagining snacks and treats to cater for a market where there has been growing meal snacking, further enhanced by Covid 19, Kelloggs brought forward the launch of their new Jumbo Snaxx brand in May.

Supersizing four of their popular cereals these products are likely to appeal to both kids and adults.

People still want to snack but are looking to do so in healthier ways without feeling deprived.

This presents new opportunities for snacks and treat brands.

21%

of UK adults are doing more snacking outside regular mealtimes but this has fallen by 14% since May

Bord Bia Indicators Barometer, Oct 2020



BORD BIA Thinking House

Ketut Subiyanto
www.pexels.com

#10 Mood Food

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



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

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

12%

of UK adults are drinking more alcohol at the weekends but there has been a 4% drop in consumption vs May

Bord Bia Indicators Barometer, Oct 2020



BORD BIA
Thinking House

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

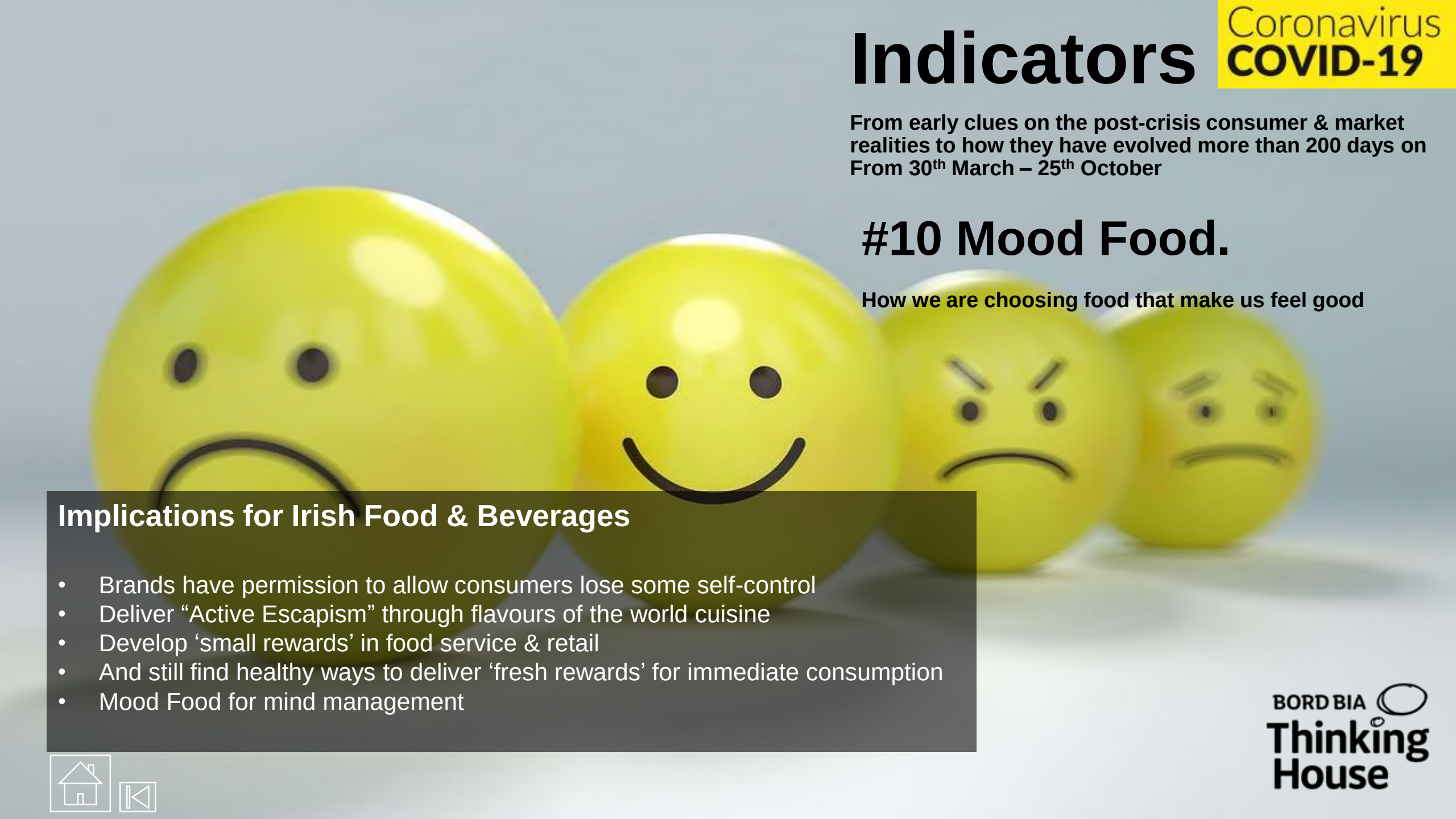
Indicators

Coronavirus COVID-19

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

#10 Mood Food.

How we are choosing food that make us feel good



Implications for Irish Food & Beverages

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

BORD BIA Thinking House



Indicators

Coronavirus COVID-19

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

#11 Smaller World.

How kids disrupted routines are influencing consumption

BORD BIA Thinking House

#11 Smaller World takes on health

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

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

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

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

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

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



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

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

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

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

#11 Smaller World takes on health.

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

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

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

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

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



https://ie.iherb.com/

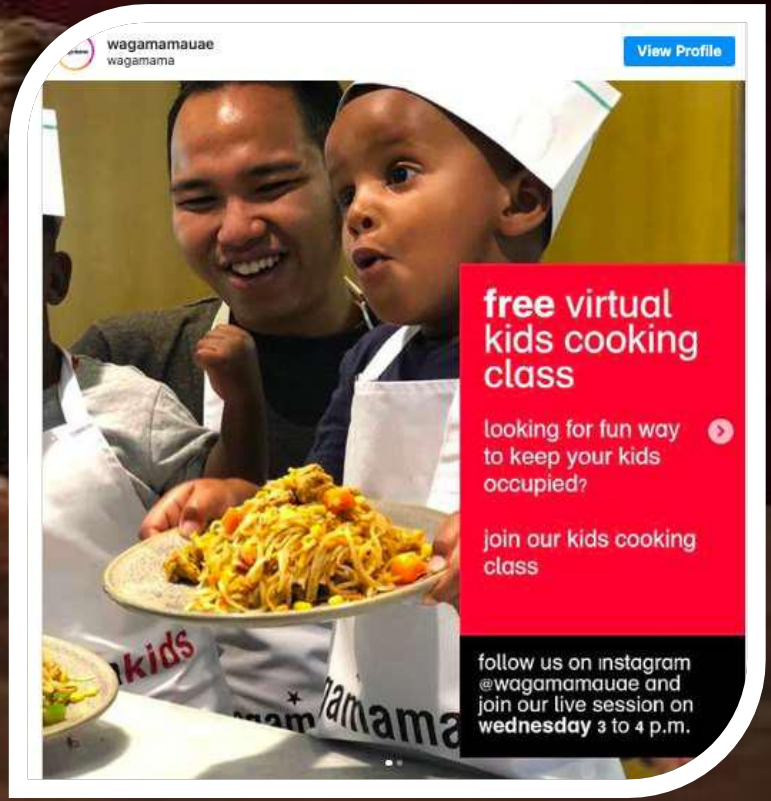
BORD BIA Thinking House

#11 Smaller World gets larger

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

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

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



BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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

#11 Smaller World.

How kids disrupted routines are influencing consumption

Implications for Irish Food & Beverages

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

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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

#12 Waste Not...

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



Photo by Joshua Hoehne on Unsplash

BORD BIA Thinking House

#12 TO WASTE OR TO WASTE NOT

While household food waste has increased in the UK according to Wrap, since the early Covid phases, there is greater awareness and conscientiousness about food waste and it's impact on the environment. However we are seeing a growing tension emerge around packaging as safety is likely to take precedence for many in making their food choices.



27%

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

29%

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



44%

of UK adults believe that it's MORE important now that the food and drink they buy is sealed and hasn't been touched
Bord Bia Indicators Barometer, Oct 2020

The immediate opportunity is for food businesses and retailers alike to continue educating consumers around food management and cooking and preservations skills especially as people continue to work from home and with limited dine out options.

BORD BIA Thinking House

Warren Wong @ www.unsplash.com

#12 WASTE NOT…

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

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

16%

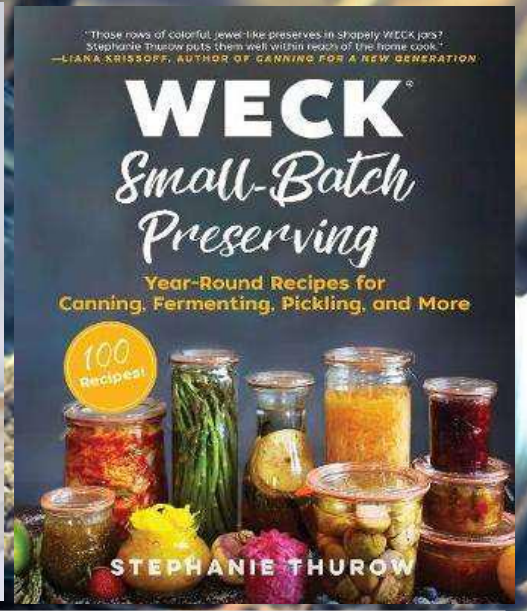
of UK adults say that they are doing more batch food storage, up 3% since May
Bord Bia Indicators Barometer, Oct 2020

36%

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



www.pexels.com
Vicky Tran



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

www.stylus.com

BORD BIA Thinking House

#12 WASTE NOT…

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

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

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

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

Mintel 2020



Singkham at www.pexels.com

BORD BIA
Thinking House



#12 WASTE NOT…

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

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

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

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

#12 WASTE NOT
Rethinking ..reuse..

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

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

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



www.flickr.com

Singkham at www.pexels.com

BORD BIA
Thinking House

Indicators

Coronavirus COVID-19

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

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

BORD BIA Thinking House

Photo by Joshua Hoehne on Unsplash

Indicators

Coronavirus COVID-19

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

#13 Chameleon Living.

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



Photo by cottonbro from Pexels

BORD BIA Thinking House

KateSade@unsplash.com

#13 Chameleon Living is not for every work culture

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

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

Reed Hastings, Netflix Cofounder

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

Satya Nadella, Microsoft CEO

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

Tim Cook, Apple Boss

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

Sundar Pichai, CEO of Google parent, Alphabet

"I see the future as being more flexible"

Irish Times, 10th October 2020

20%

of UK adults miss going to work with their colleagues

Bord Bia Indicators Barometer. Oct 2020

BORD BIA Thinking House

#13 Chameleon Living.. is not for everyone

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

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

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

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

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



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

Gustavo Fring
www.pexels.com

#13 Chameleon Living.

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

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

33%

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

Bord Bia Indicators Barometer

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



BORD BIA
Thinking House

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

Indicators

Coronavirus COVID-19

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

#13 Chameleon Living.

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



Photo by cottonbro from Pexels

BORD BIA Thinking House

Indicators

Coronavirus
COVID-19

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



#14 Delivery Fatigue.

How consumers are opting-in and out of food delivery

BORD BIA
Thinking
House

Photo by [illegible] on Pexels

#14 Delivery Fastracks

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

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

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

20%

of UK adults are getting take aways more often
Bord Bia Indicators Barometer

16%

of UK adults are getting more meal deliveries +6% vs May 2020
Bord Bia Indicators Barometer

55%

of UK adults miss out on eating in formal restaurants
Bord Bia Indicators Barometer, Oct 20

BORD BIA Thinking House

Kai Pilger @ unsplash.com

#14 Delivery meets safety

As people are embracing delivery over collection, likely for safety reasons, there's a role for brand partnerships in creating a unique approach to having a distinctive and safer approach to food delivery.

12%

of UK adults are collecting takeaways
Bord Bia Indicators Barometers, Oct 2020

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

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

www.stylus.com

deliveroo

LUSH FRESH HANDMADE COSMETICS

BORD BIA Thinking House

#14 Delivery meets safety

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

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

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

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



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

BORD BIA Thinking House

#14 Delivery Fatigue opened the door to the mealkit market

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

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

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

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

As people are enjoying cooking from scratch more, perhaps meal kits could be part of the solution as busy lives take off once more

26%

of UK adults are doing more cooking from scratch

Bord Bia Indicators Barometer, Oct 2020

BORD BIA Thinking House

#14 Delivery Fatigue opened the door to the mealkit market

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

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

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



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

BORD BIA Thinking House

#14 Delivery Fatigue ..cooking fatigue..

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

55%

Of Americans report they feel fatigued with cooking

Canvas8, October 2020

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

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

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

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

Canvas 8, October 2020

sebastiancoman@unsplash.com



BORD BIA Thinking House

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

Indicators

Coronavirus COVID-19

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

#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
- Create new safety first delivery opportunities
- Creating new partnerships in delivery
- New chef in home opportunities

BORD BIA Thinking House

Indicators

Coronavirus COVID-19

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



#15 Championing Community.

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

BORD BIA Thinking House

Photo by cottonbro from Pexels

#15 Championing Community

BORD BIA Thinking House

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

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

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

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

73%

of UK adults feel the teachers and the cleaning staff have been heroic during this time

Bord Bia Indicators Barometer

67%

of UK adults feel the retailers have been heroic during this time

Bord Bia Indicators Barometer

#15 Championing Community: altogether now?

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

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

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

In parallel people are also concerned about the economy with more than 6 in 10 concerned about the long term impact of the economy. There is also a belief that the continuation of normal life and services is important with supermarkets and food producers playing a highly valued community role.

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

8 in 10

of UK adults feel the supermarkets and food producers are deemed more critically important to continue their normal operations than the likes of delivery Services and even schools.

Bord Bia Indicators Barometer, Oct 2020

77%

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

Bord Bia Indicators Barometer, Oct 2020

47%

of UK adults are very or extremely concerned about the ability of the health service to to cope…

Bord Bia Indicators Barometer, Oct 2020

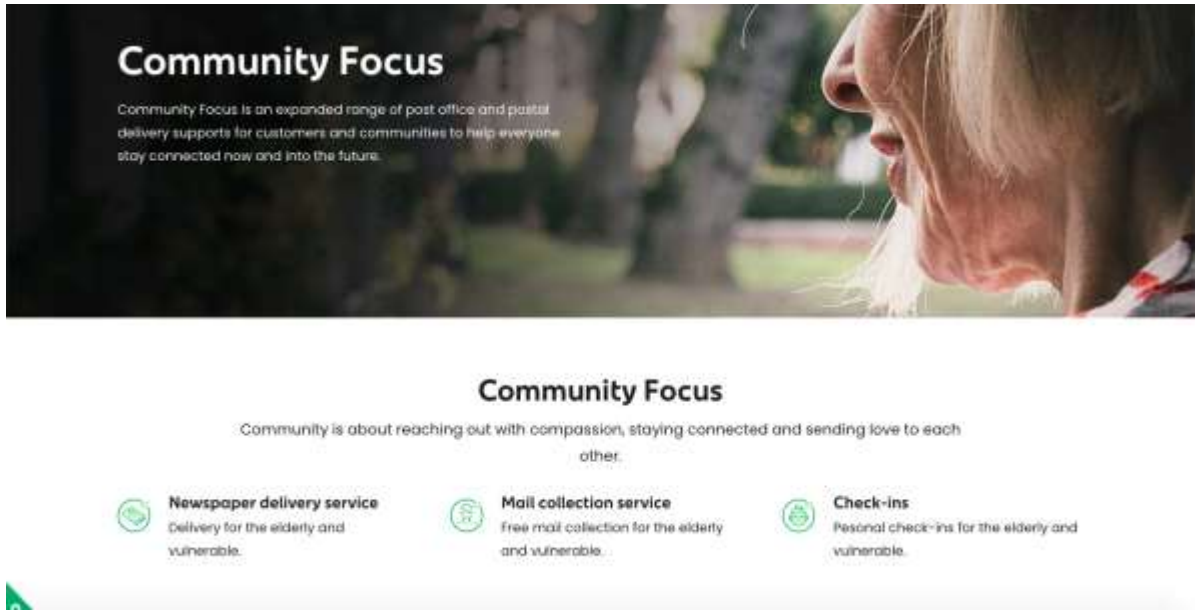
#15 Championing Community

How are food and drinks brands responding?

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

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

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



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

Indicators

Coronavirus COVID-19

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

#15 Championing Community.

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

Implications for Food and Drinks Businesses:

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



Photo by [illegible] from Pexels

BORD BIA Thinking House

Validators

Coronavirus COVID-19

BORD BIA Thinking House

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.



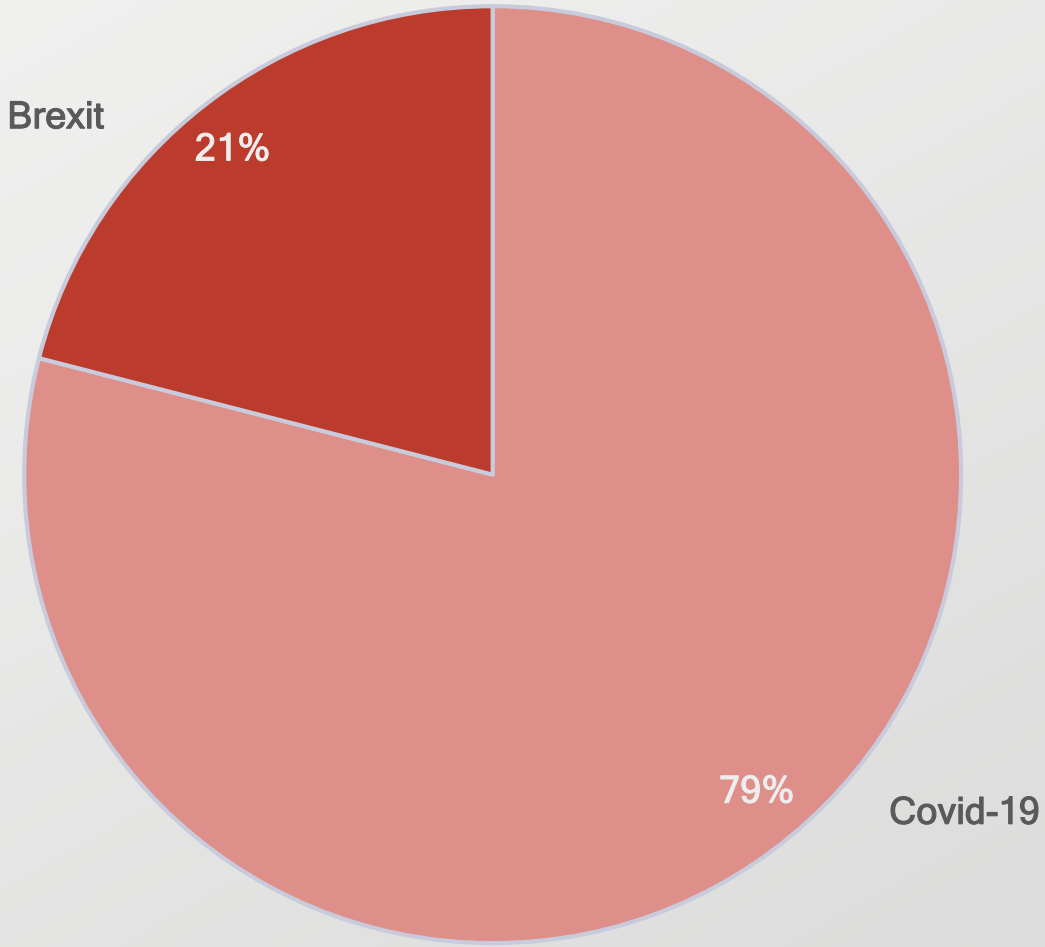
IMPORTANCE & INFLUENCE OF COVID-19

BORD BIA
Thinking House

Covid-19 vs. Brexit – Which is of greatest Concern?

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus
COVID-19



The continued concern with Covid-19 is evident with 8 in 10 UK adults feeling it is a greater concern than Brexit.

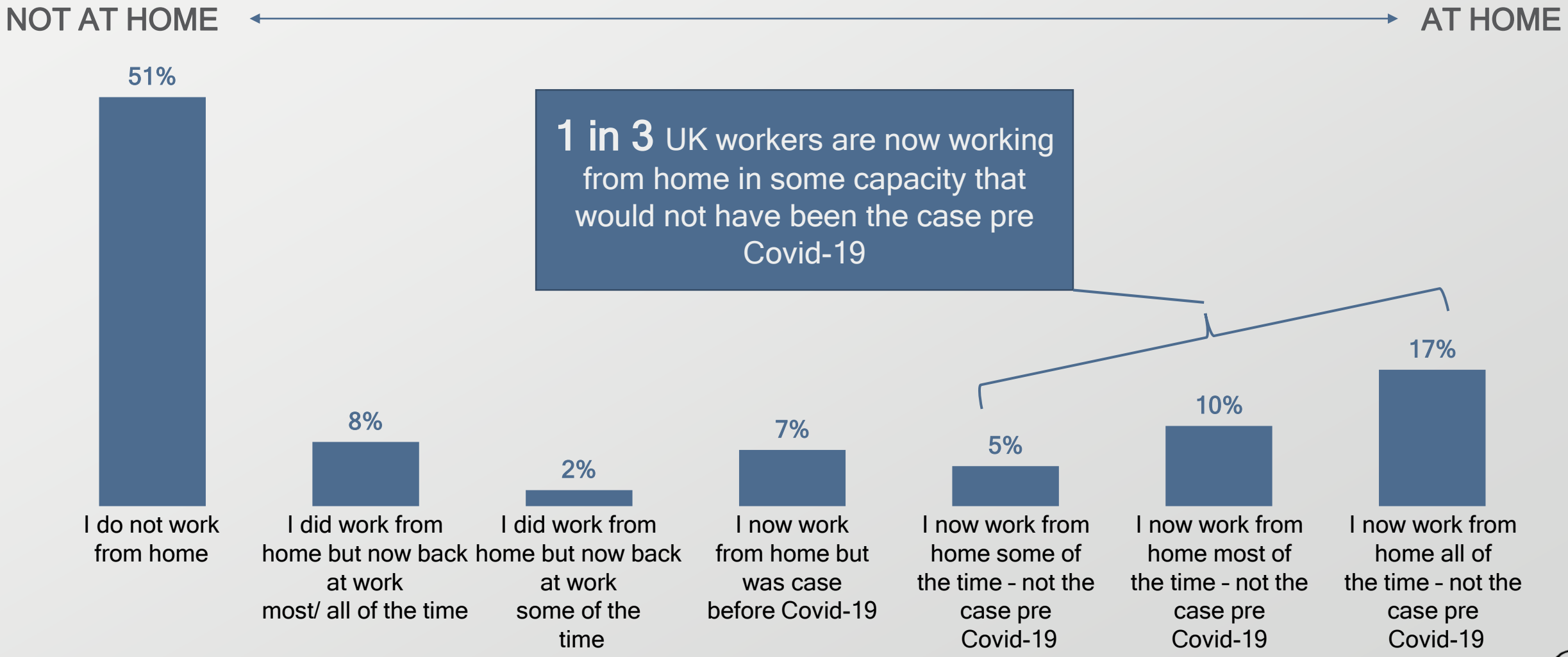
BORD BIA
Thinking House

Which of these is of greatest concern to you personally?

Changing Work Dynamics as a result of Covid-19

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



BORD BIA Thinking House

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



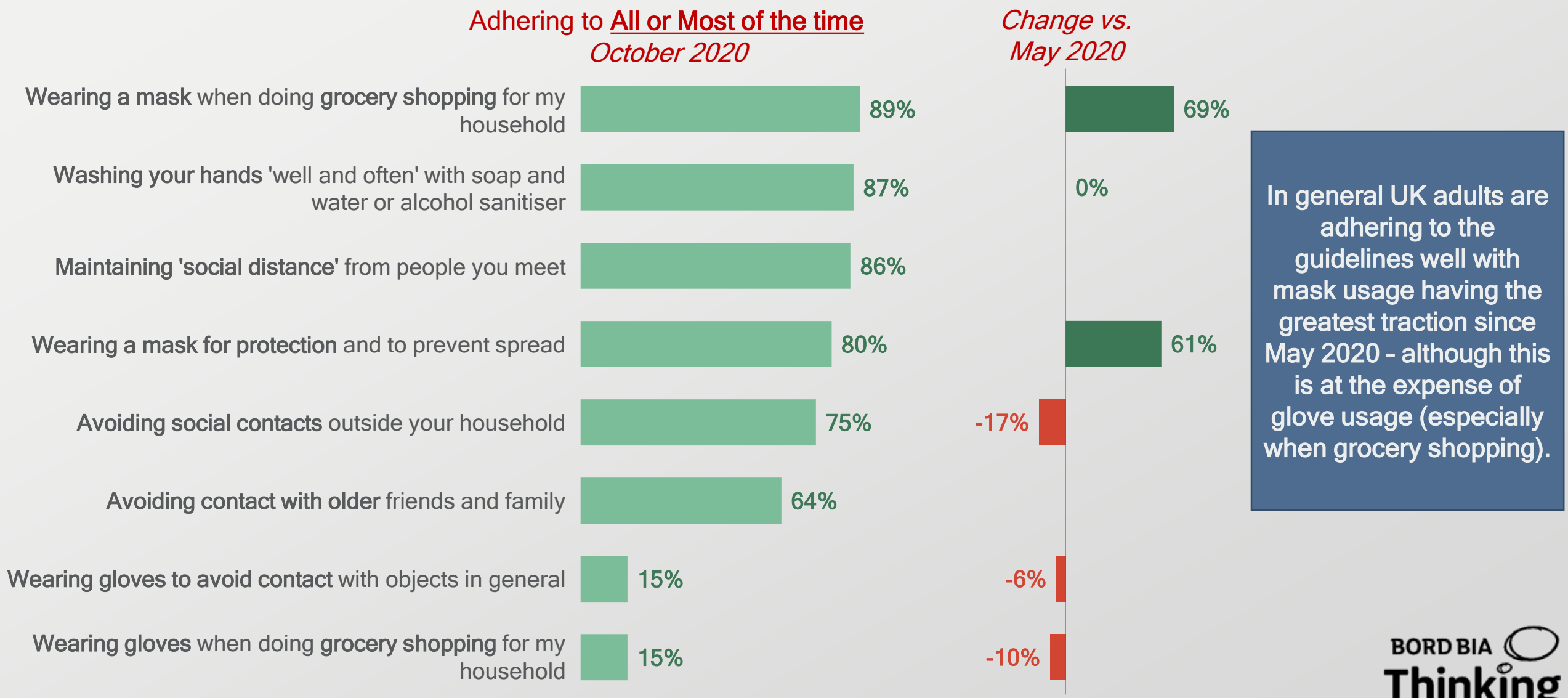
GUIDELINES & RESTICTIONS

BORD BIA
Thinking House

Current Adherence to Specific Guidelines

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



In general UK adults are adhering to the guidelines well with mask usage having the greatest traction since May 2020 – although this is at the expense of glove usage (especially when grocery shopping).

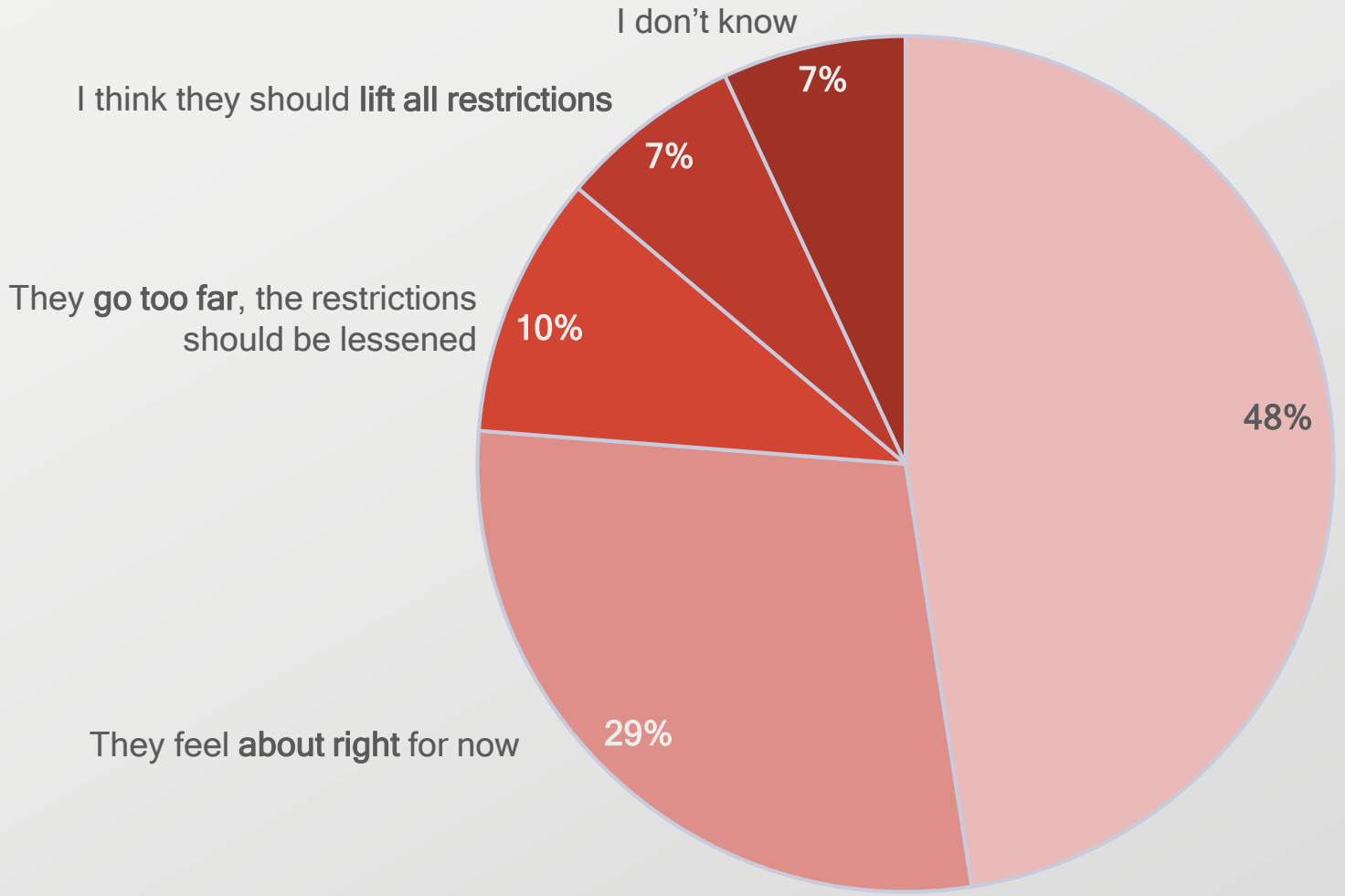
You will see some specific recommended actions designed to limit the spread of Coronavirus (Covid-19) below, to what extent have you generally adhered to each of the following?

BORD BIA Thinking House

Do the Restrictions go far enough?

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



Attitudes to the restrictions are polarising although almost 5 in 10 adults feel they don't go far enough compared to just 3 in 10 feeling they are about right for now.

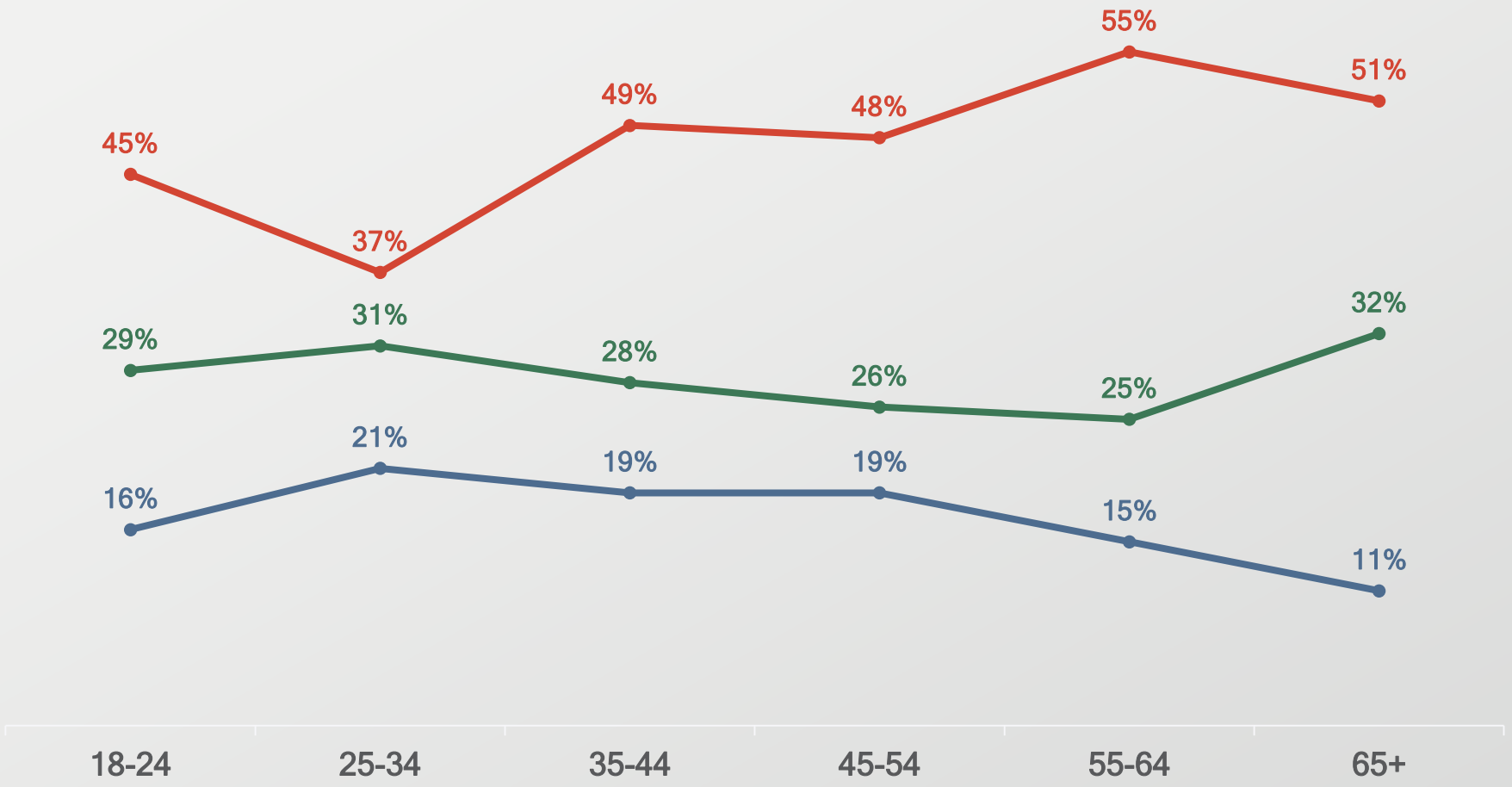
BORD BIA Thinking House

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

Do the Restrictions go far enough – by Age Group?

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



The sense that the restrictions don't go far enough is driven by older adults, but younger adults are more keen keeping the status quo and evening having them eased/ lifted.

BORD BIA Thinking House

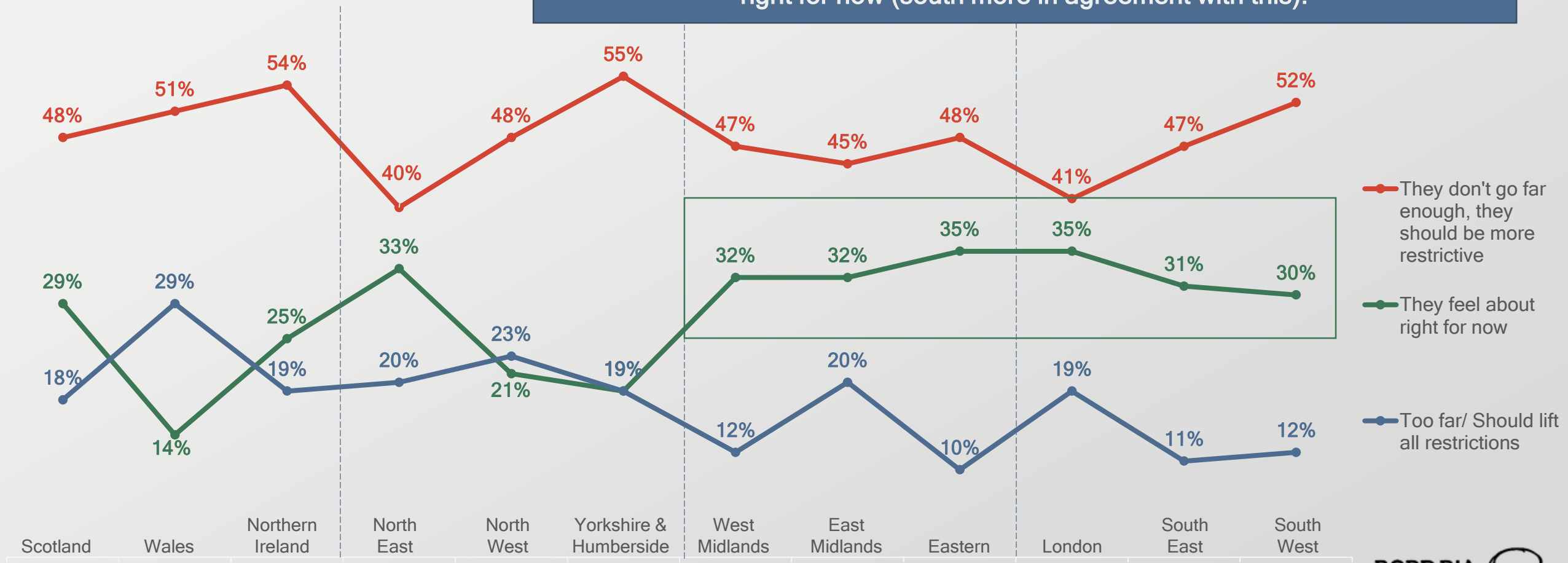
The Government has had to implement restrictions on society in order to minimise the risk of Covid-19 spreading in the community. Which of these options best describes how you feel about these restrictions?

Do the Restrictions go far enough – by Region?

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)

While the dominant attitude for every region is that they don't go far enough, we sense somewhat of a North/ South England divide in terms of them being about right for now (south more in agreement with this).



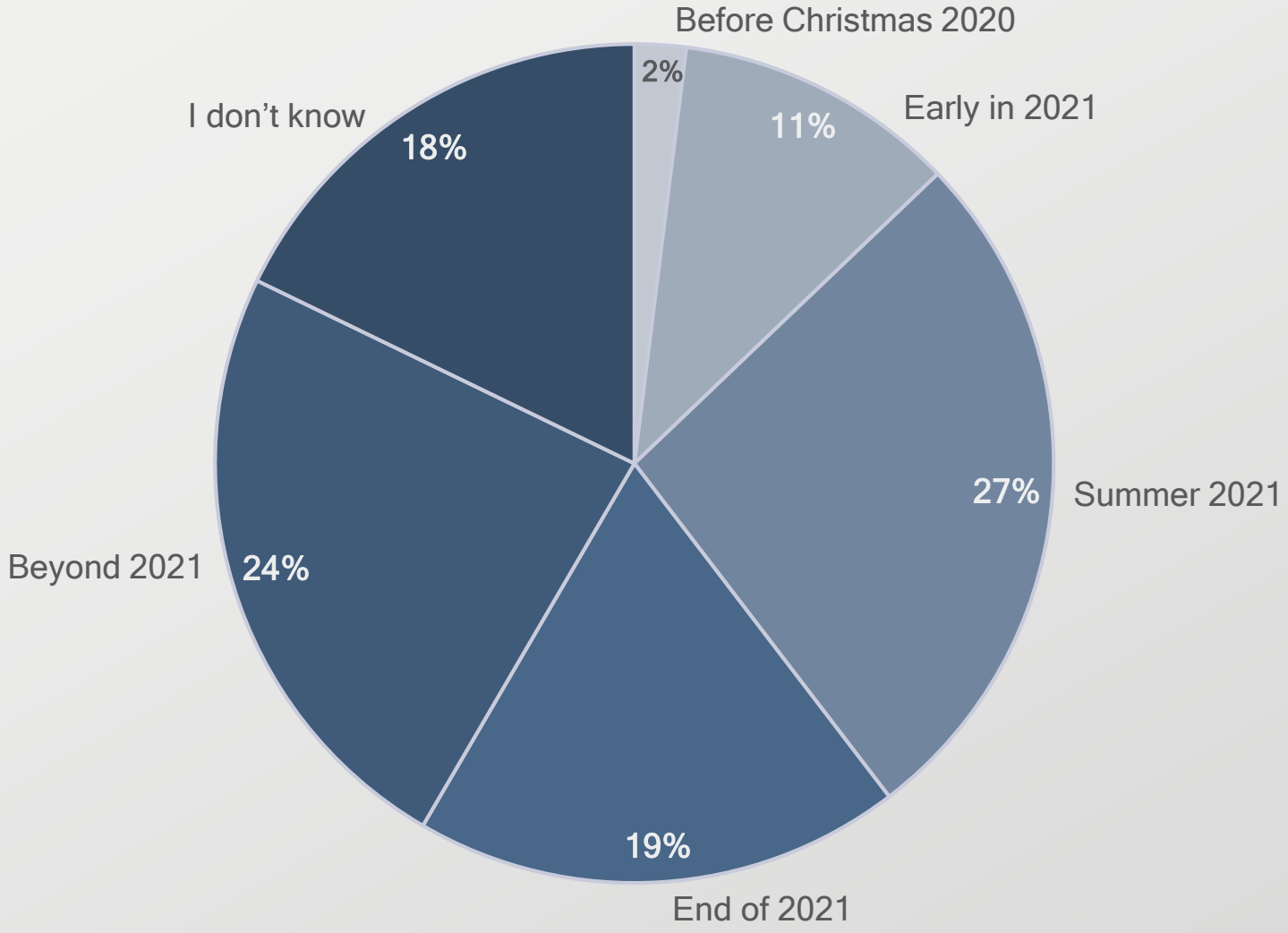
BORD BIA Thinking House

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

When will the Restrictions lift?

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



There is little sense among UK adults that the restrictions will be lifted any time soon - even 1 in 4 feel it will be beyond 2021.

BORD BIA Thinking House

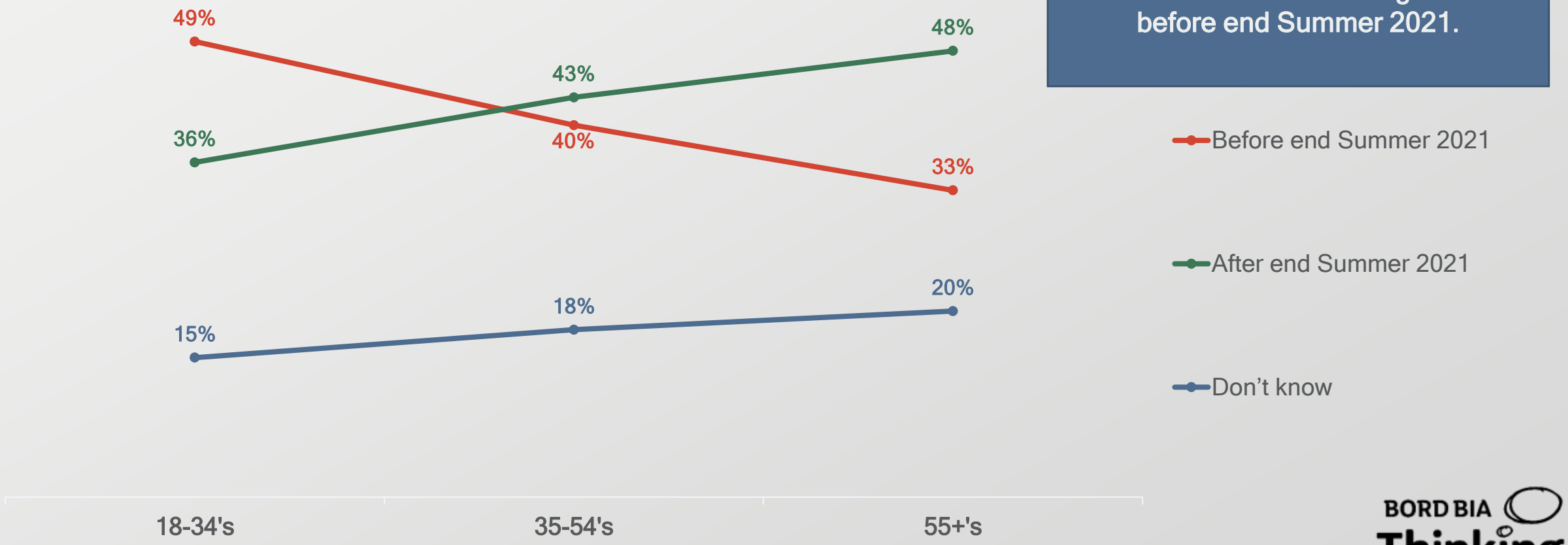
In your opinion, when do you think the Covid-19 crisis will have passed with the restrictions on society removed?

When will the Restrictions lift – by Age Group?

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19

Younger adults are the most optimistic in terms of a more immediate lifting of restrictions - 5 in 10 feeling it will be before end Summer 2021.



BORD BIA Thinking House

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



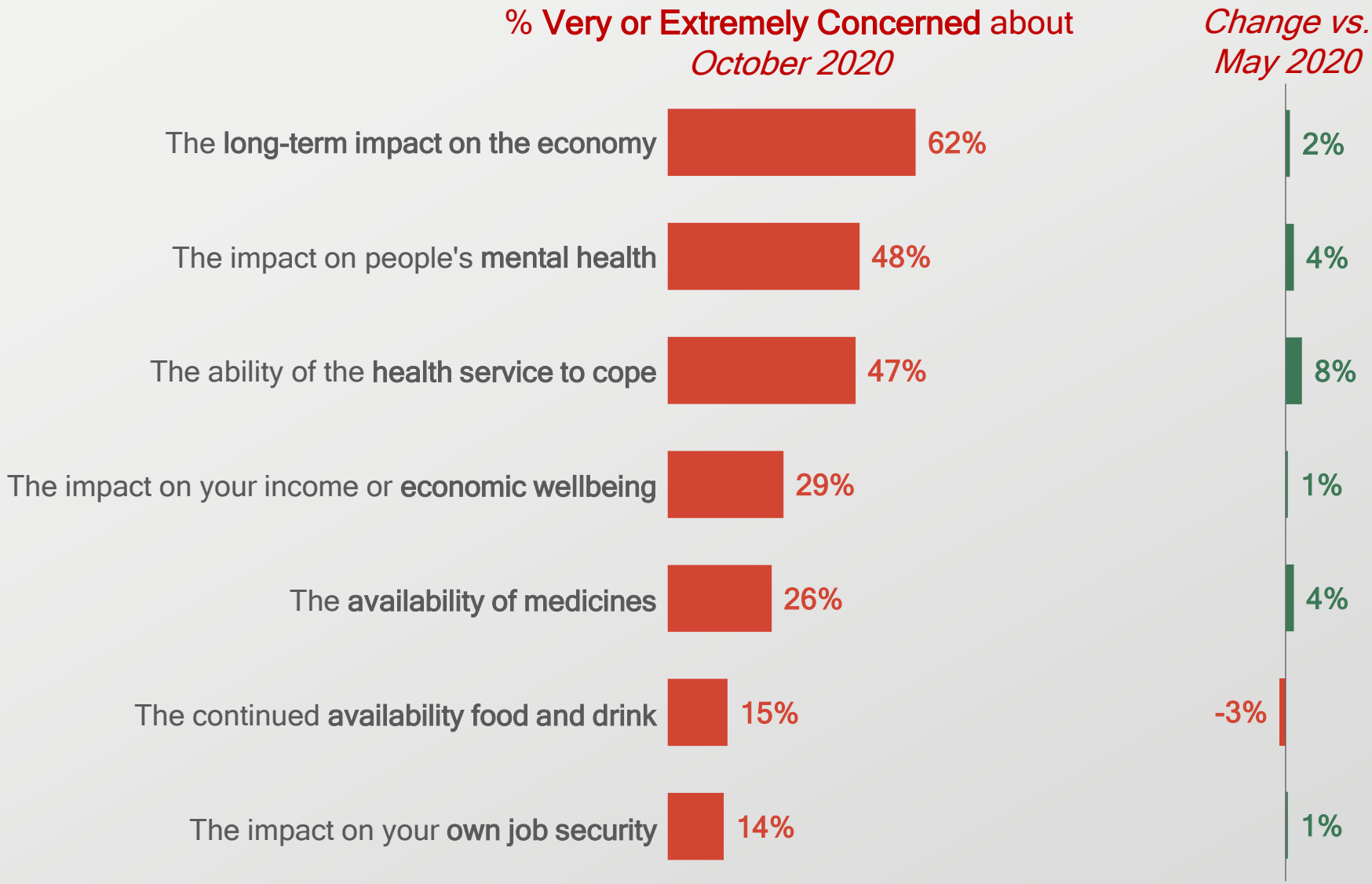
A RETROSPECTIVE VIEW

BORD BIA
Thinking House

Level of Concern for Various Aspects

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



Concern remains high from a long term economy, mental health and coping of health service perspective… so much so that concern for these aspects has increased since May 2020.

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

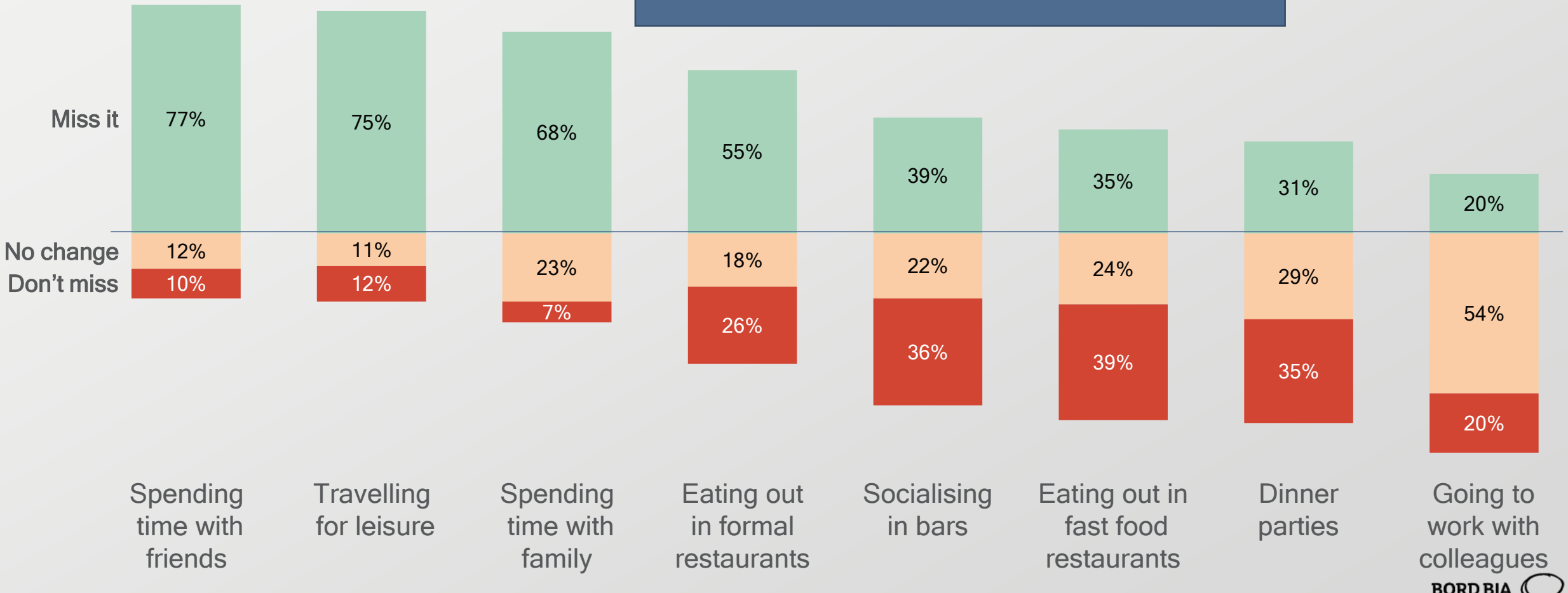
BORD BIA Thinking House

Aspects that are Missed

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19

From a Food Service perspective, over half of UK adults miss eating out in formal restaurants and over 1 in 3 miss eating out in fast food restaurants.



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

BORD BIA Thinking House

Who are Missing Food Related Aspects?

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19

BORD BIA Thinking House

Eating out in Formal Restaurants

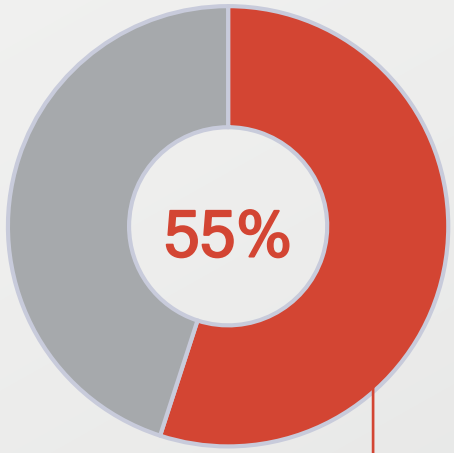




Photo by Toa Heftiba on Unsplash

Eating out in Fast Food Restaurants

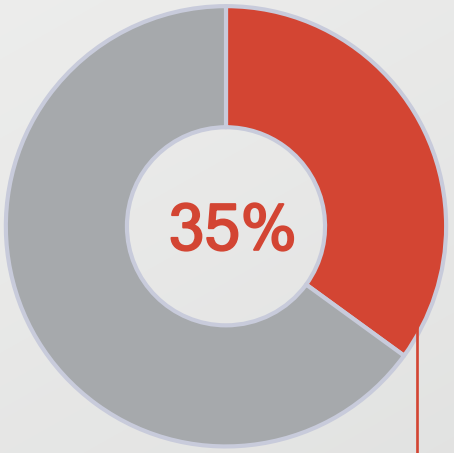




Photo by Jaco Pretorius on Unsplash

Dinner Parties

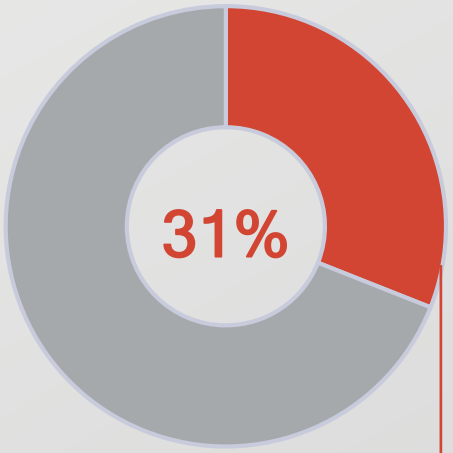




Photo by Kelsey Chance on Unsplash

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

Importance of 'normal life' continuation of Services

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



Interestingly Supermarkets and Food Producers are deemed more critically important to continue their normal operations than the likes of Delivery Services and even Schools.

BORD BIA Thinking House

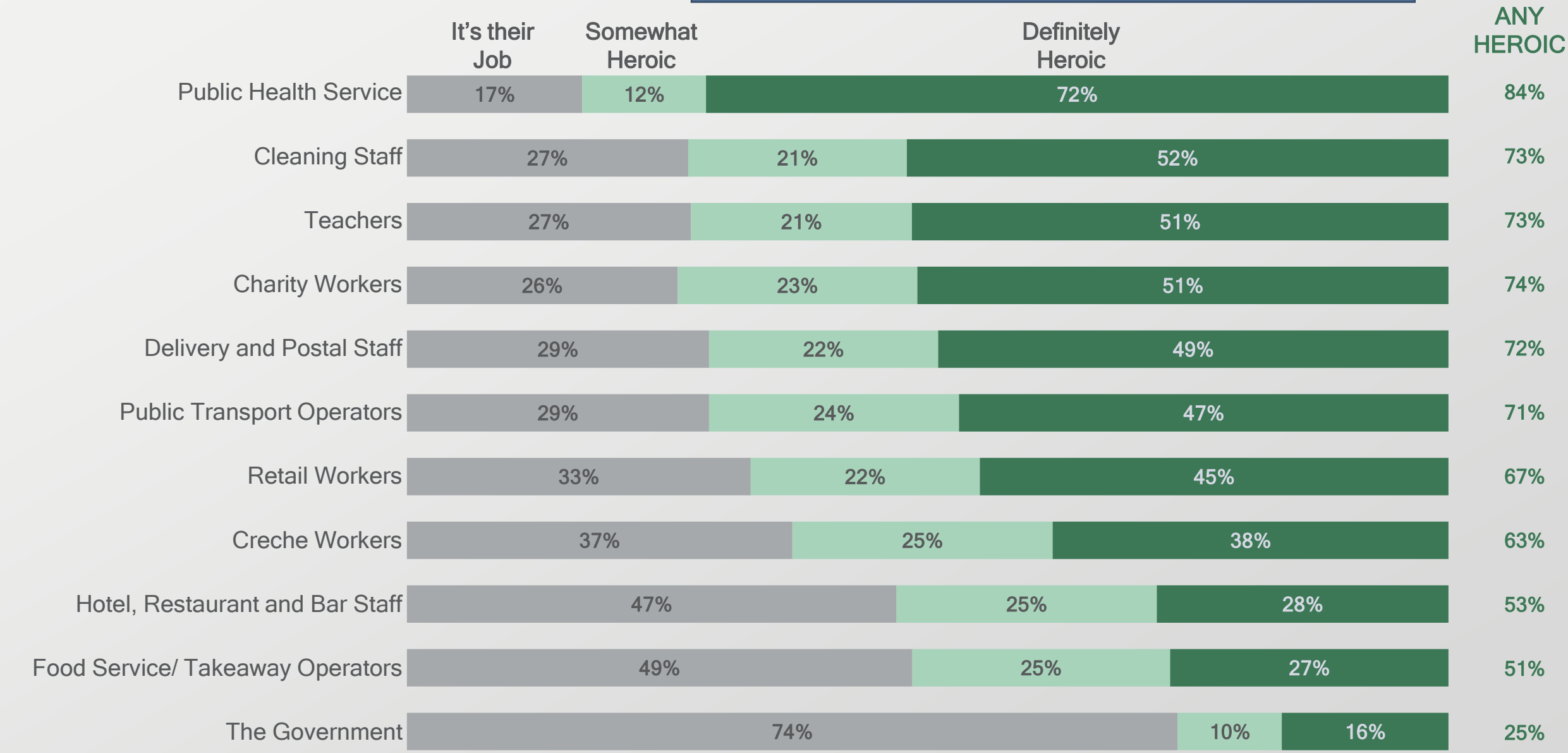
How important you believe their continued operation is to the maintenance of "normal life" during Covid-19 restrictions.

Who has been Heroic?

(Base: Adults 18+ in the United Kingdom, n=1,079)

There are many heroes as a result of the pandemic - 2 in 3 adults feel retail workers have been heroic during this time.

Coronavirus COVID-19

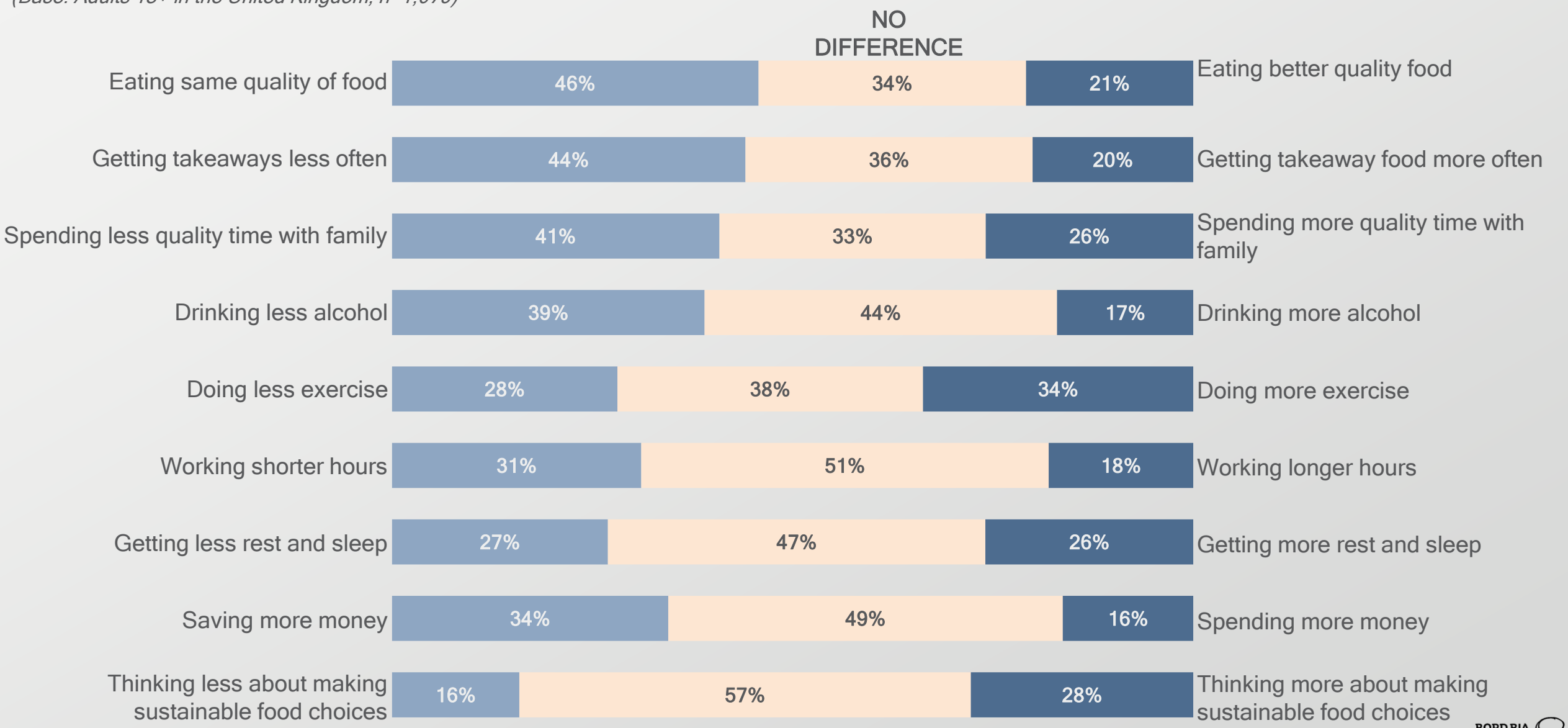


Can you please use the scale to indicate the extent to which you believe they are a hero/heroine or not?


Coronavirus
COVID-19
CHANGING PRIORITIES
BORD BIA
Thinking
House

Changing Priorities as a result of Covid-19?

(Base: Adults 18+ in the United Kingdom, n=1,079)

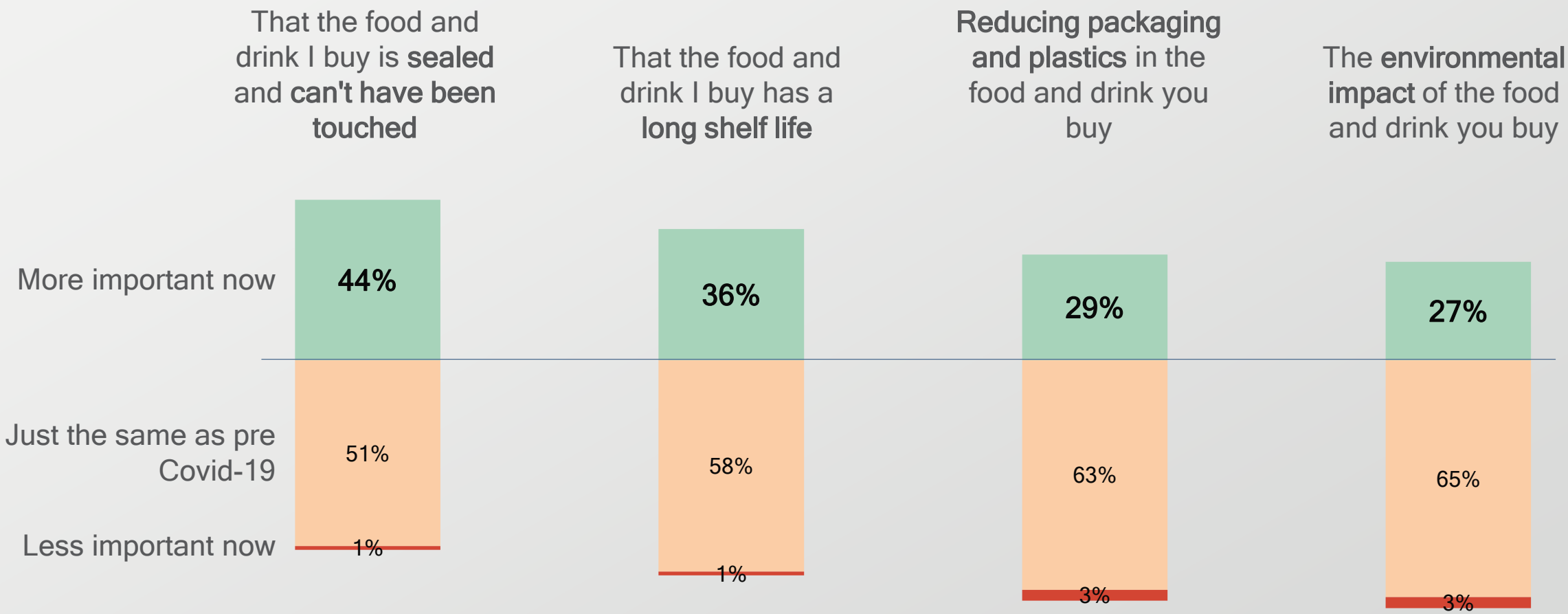


Can you please use the scale to indicate the extent to which you believe they are a hero/heroine or not?

Changing Priorities

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



The protection of food has become more important for almost half of UK adults (44%), with environmental impacts also gaining traction for a substantial proportion of adults.

BORD BIA Thinking House

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



Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

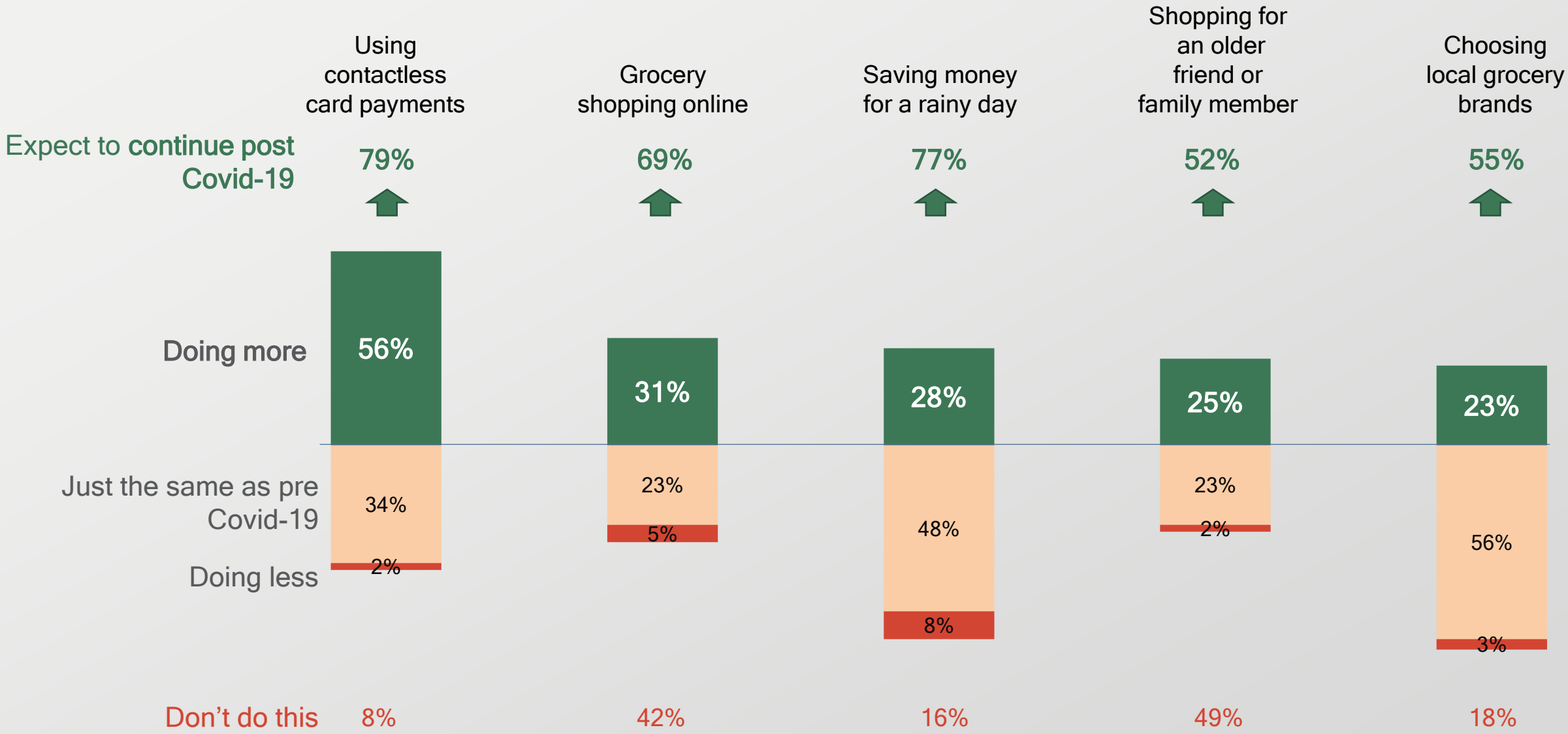
Money & Shopping

BORD BIA
Thinking House

Money & Shopping – Behaviour Based

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



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

BORD BIA Thinking House

Money & Shopping – Caution Based

(Base: Adults 18+ in the United Kingdom, n=1,079)



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

Money & Shopping – Difference vs. May 2020

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



Interesting to see that as UK adults progress through the pandemic, contactless payments have continue to be used more since May along with online grocery shopping behaviour in particular.

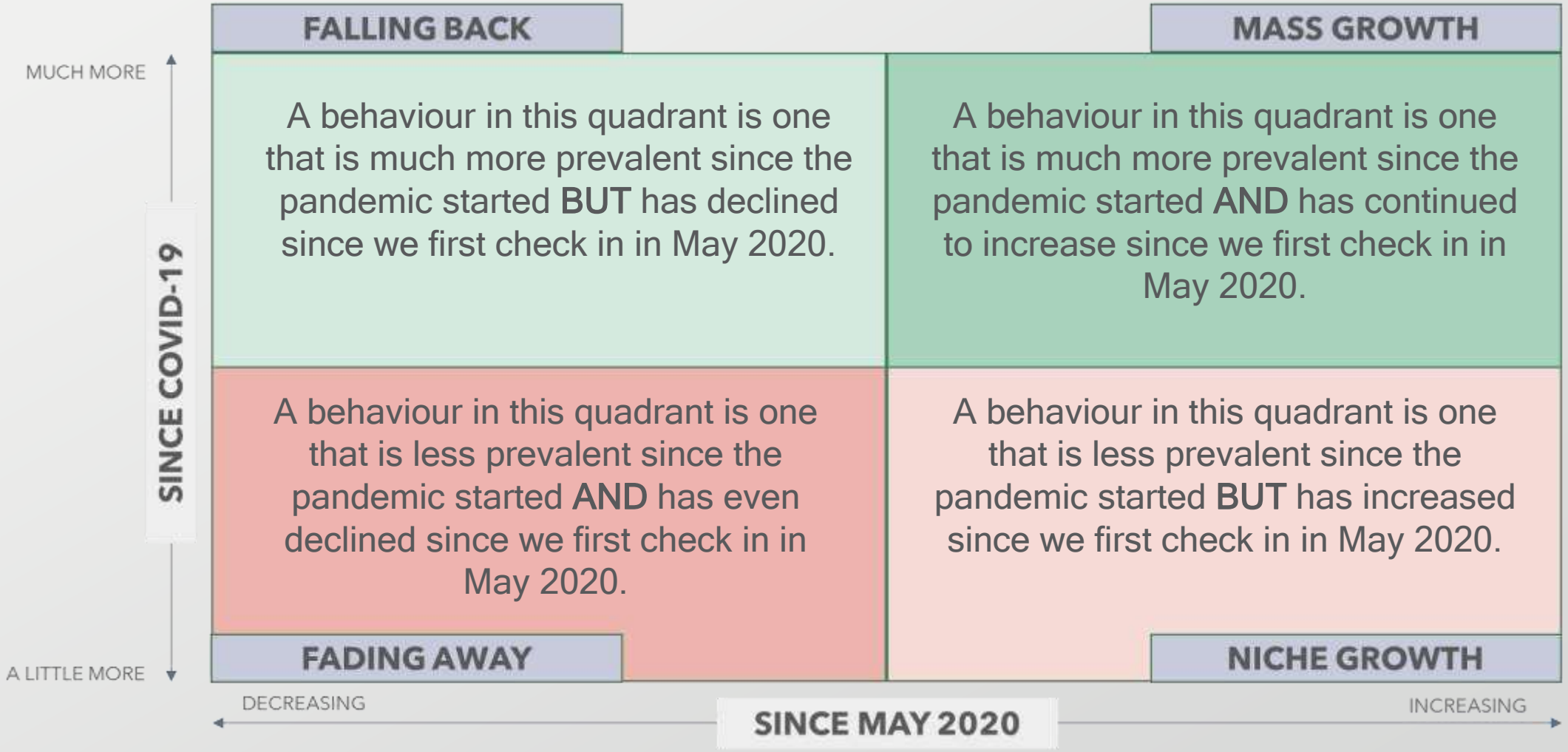
And while people are not minimising their trips to the shops as much as in May, over half of adults continue to do this.

BORD BIA Thinking House

Understanding Behaviour since May 2020

Coronavirus COVID-19

The purpose of the grid below is to identify the increase in behaviours since the pandemic started and the they have changed since May 2020 (whether they have decreased, stayed the same or increased).

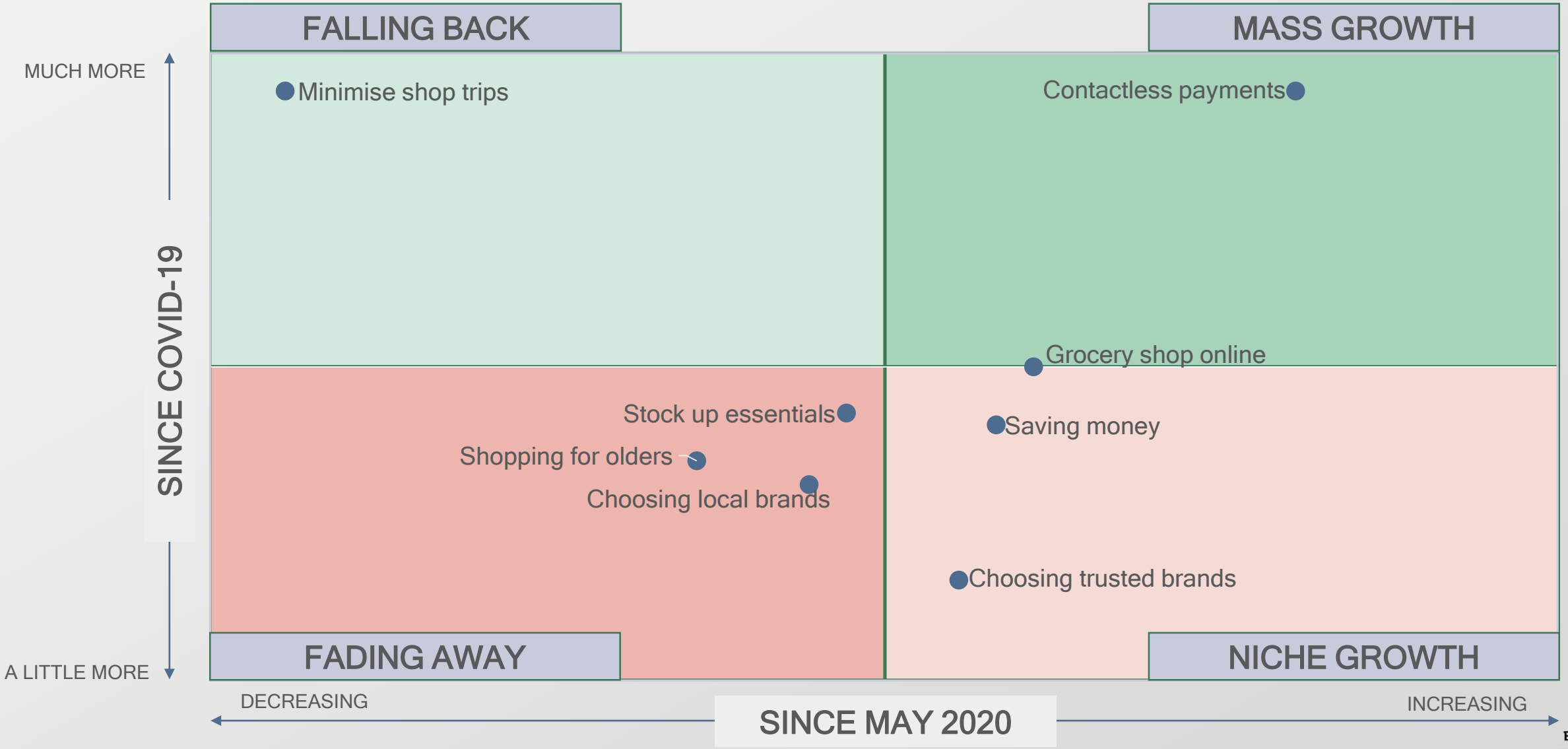


BORD BIA Thinking House

Money & Shopping – Difference vs. May 2020

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



BORD BIA Thinking House



Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

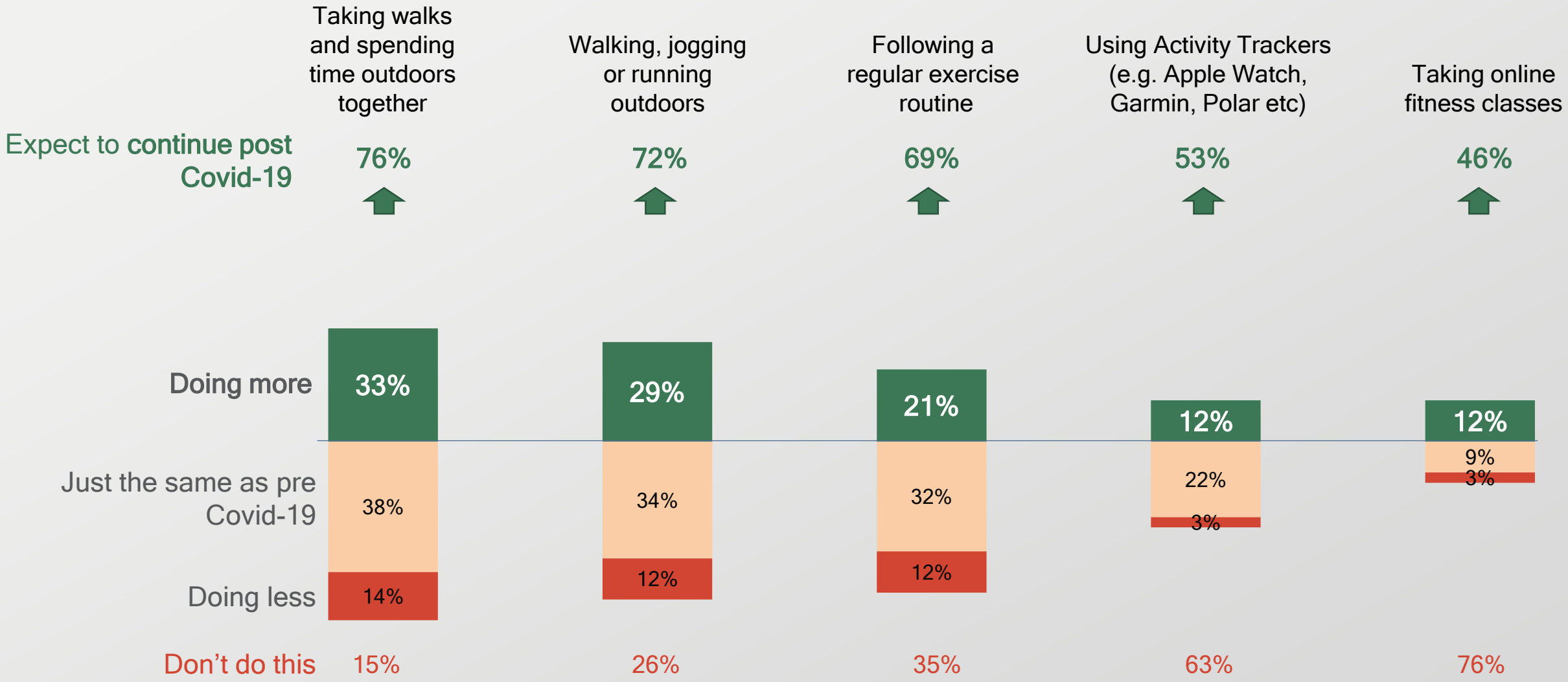
Family Life, Health & Wellness

BORD BIA
Thinking House

Family Life/ Health & Wellness – Activity Based

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



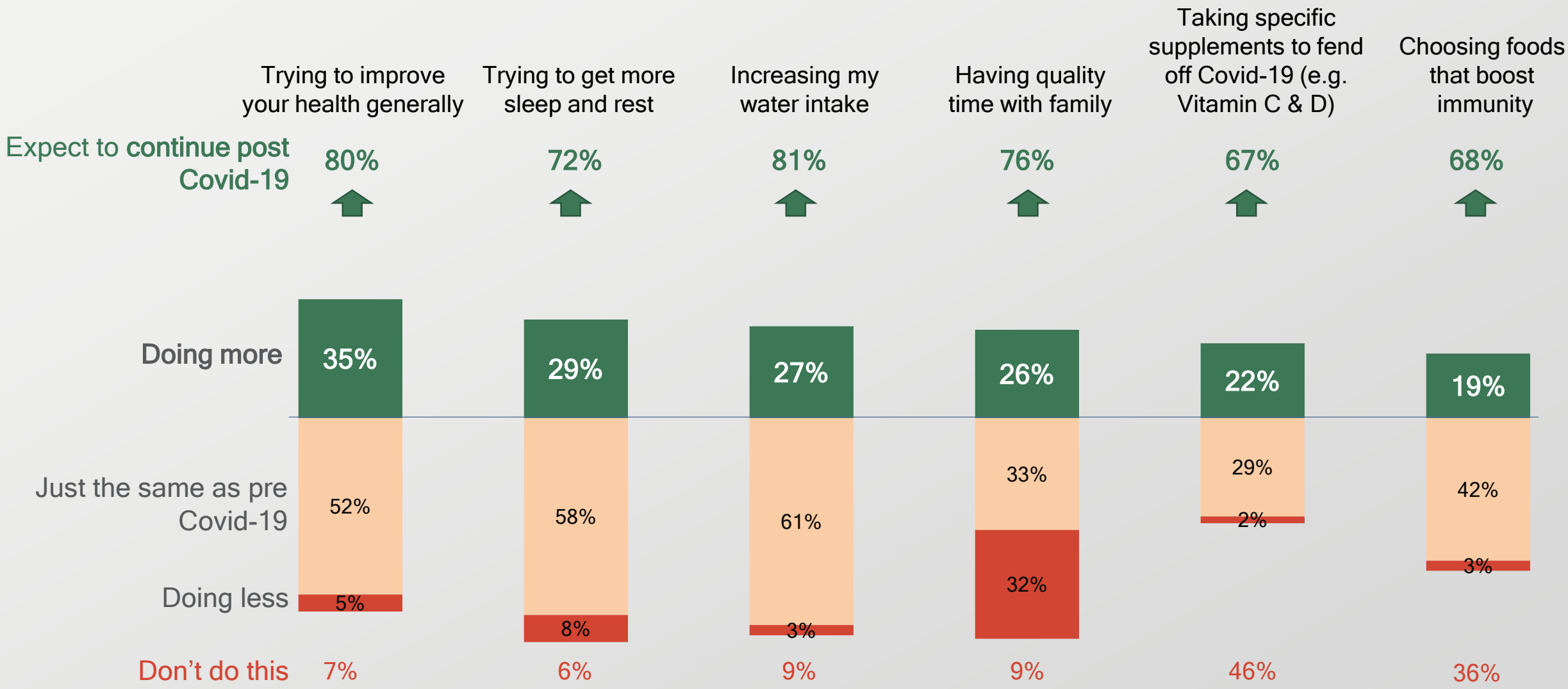
BORD BIA Thinking House

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

Family Life/ Health & Wellness – Health Based

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



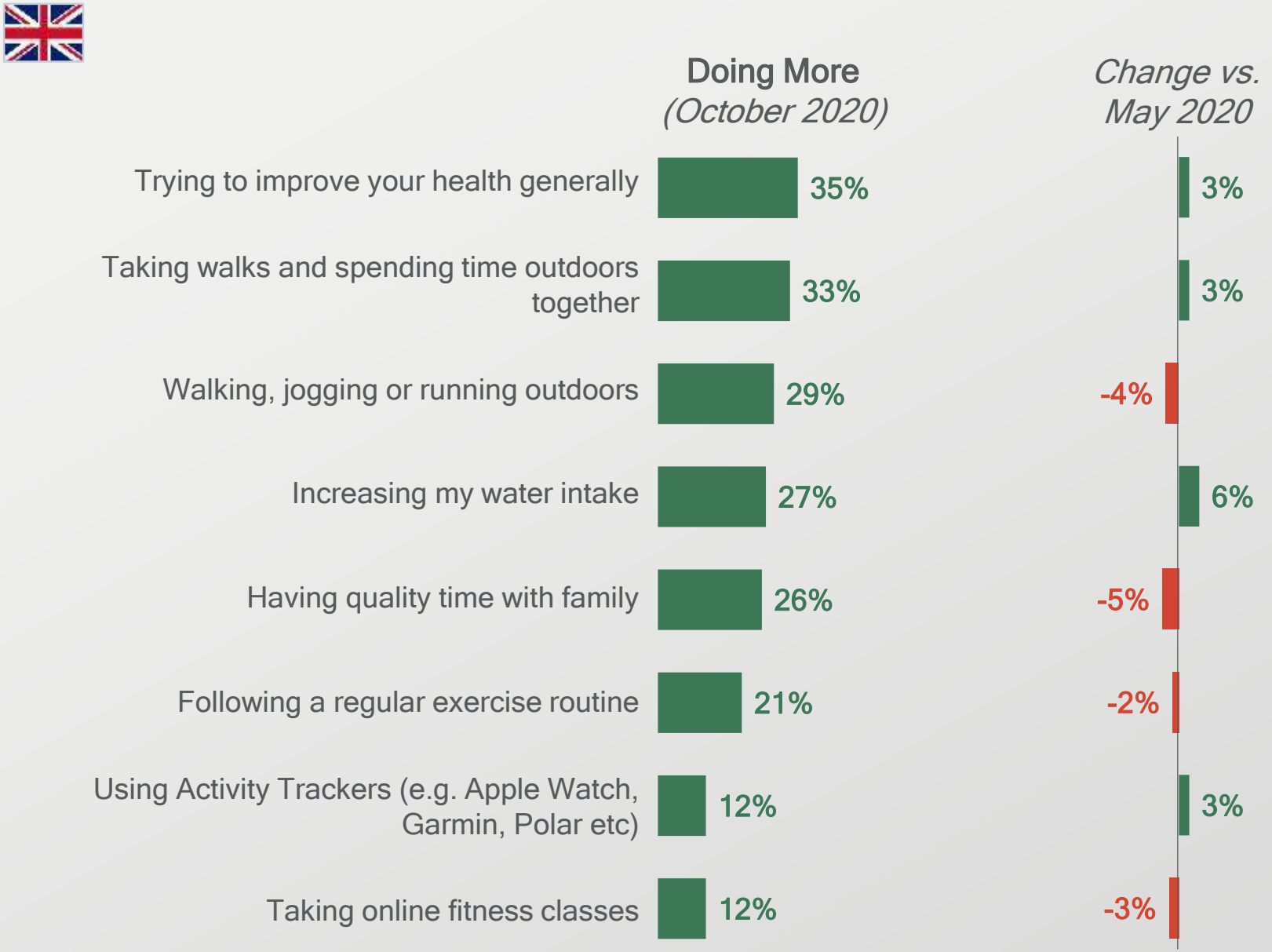
For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.

BORD BIA Thinking House

Family Life/ Health & Wellness – Difference vs. May 2020

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



The greatest progression of behaviours since May is around a more general healthier lifestyle and increasing water intake.

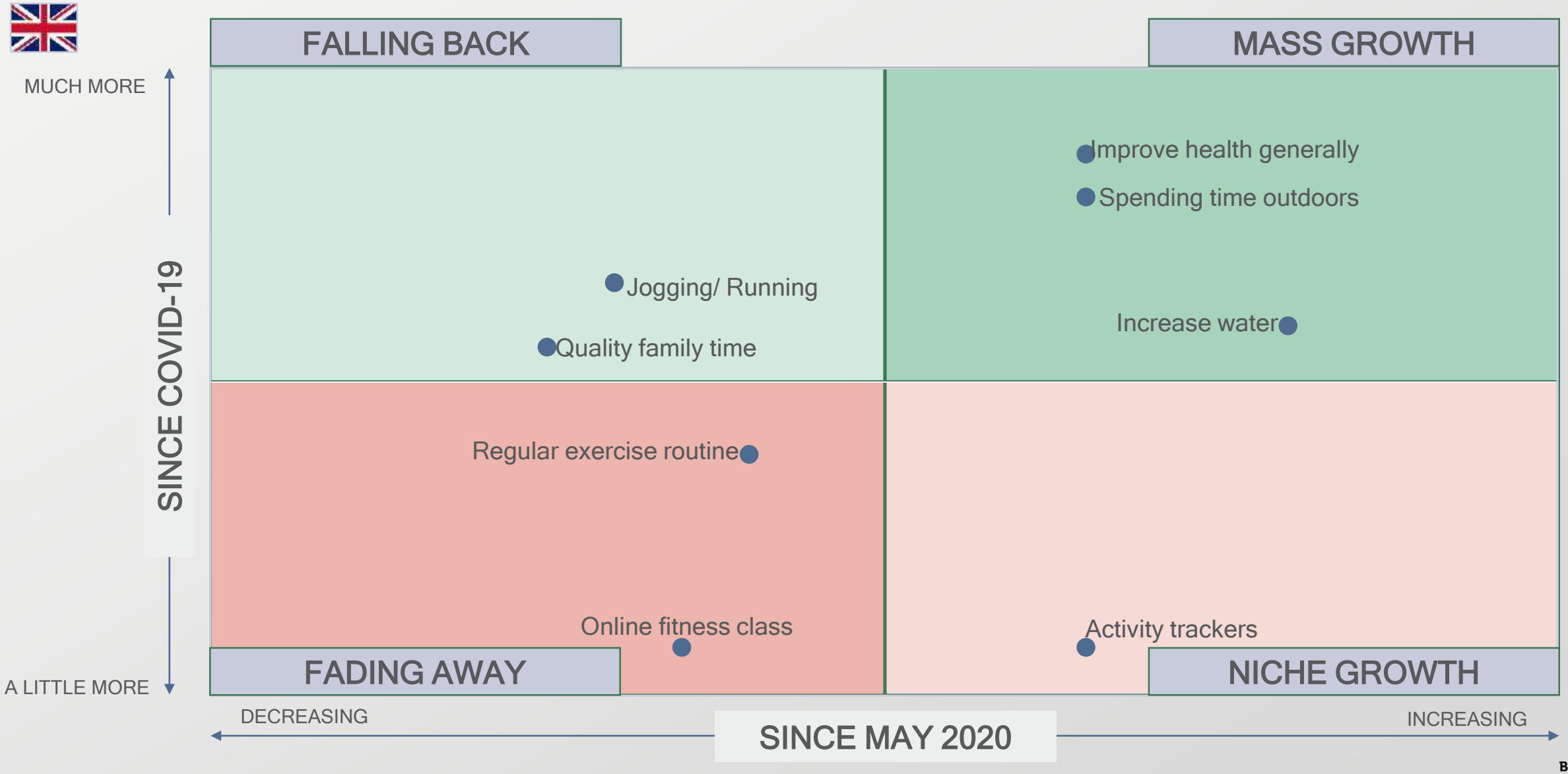
More specific activities around jogging/ running, family time, online fitness classes have fallen back however – indicative of a waning on behaviours that were more engaging at the start of the pandemic.

BORD BIA Thinking House

Family Life/ Health & Wellness – Difference vs. May 2020

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



BORD BIA Thinking House



Coronavirus
COVID-19

UNDERSTANDING BEHAVIOUR CHANGES

Food & Drink

BORD BIA
Thinking House

Food & Drink – Enjoyment Based

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



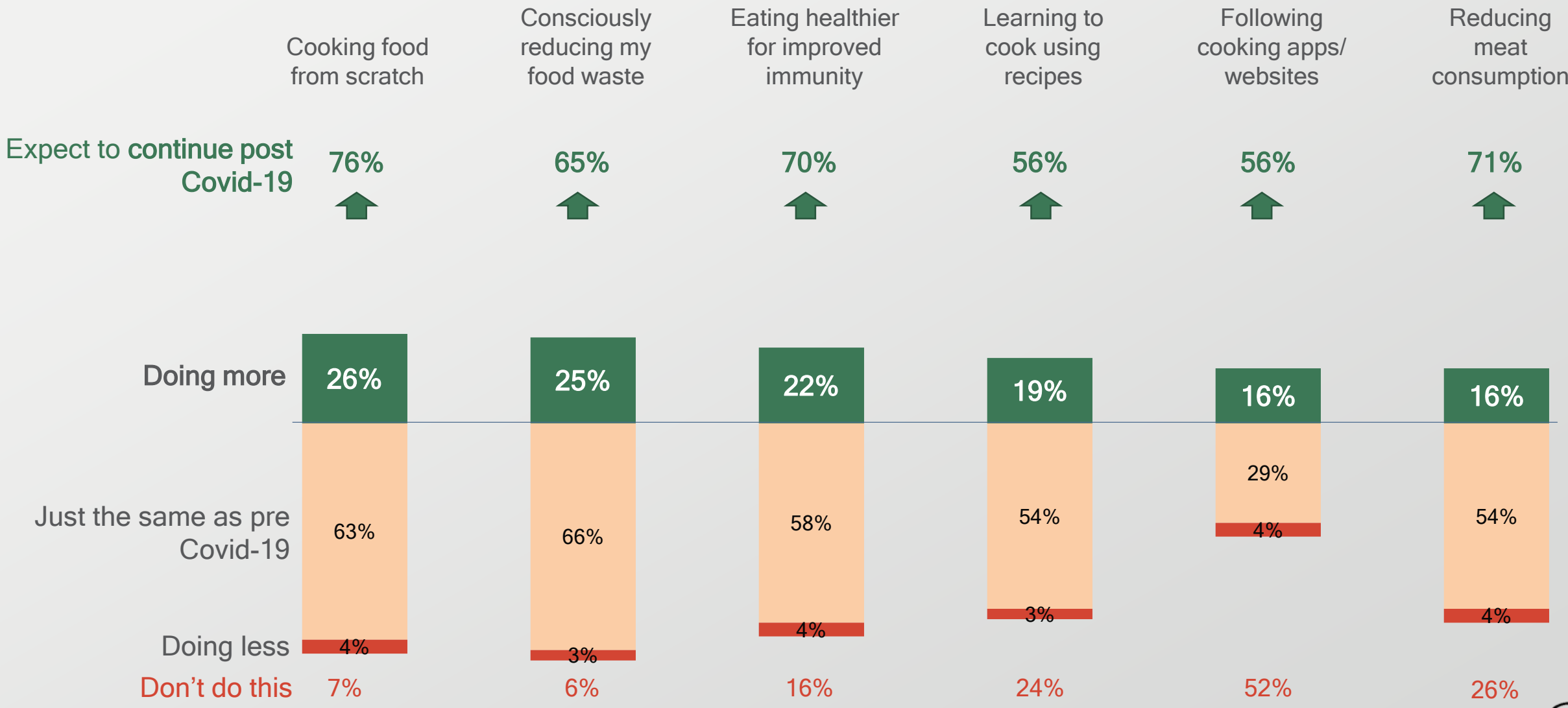
For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.

BORD BIA Thinking House

Food & Drink – Health Based

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



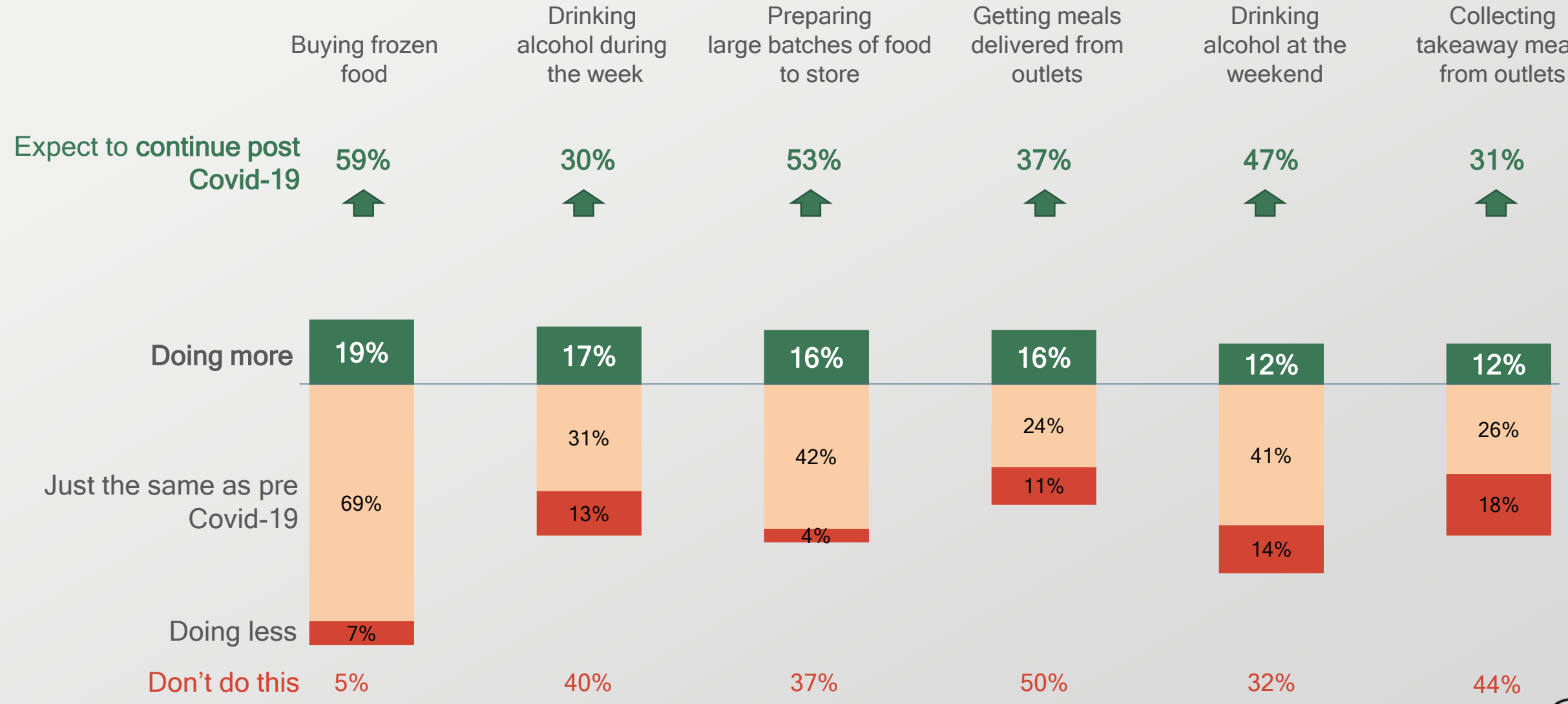
For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.

BORD BIA Thinking House

Food & Drink – Behaviour Based

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



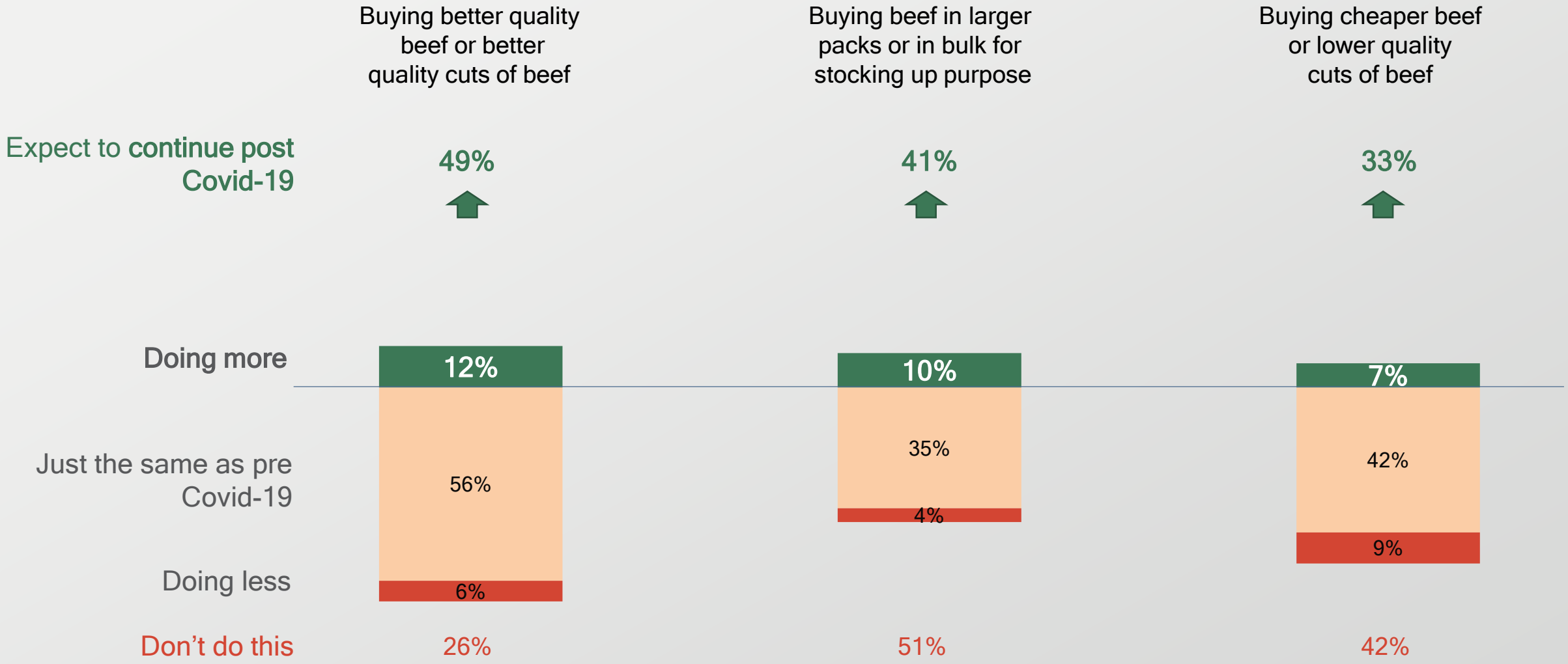
For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.

BORD BIA Thinking House

Food & Drink – Beef Based

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



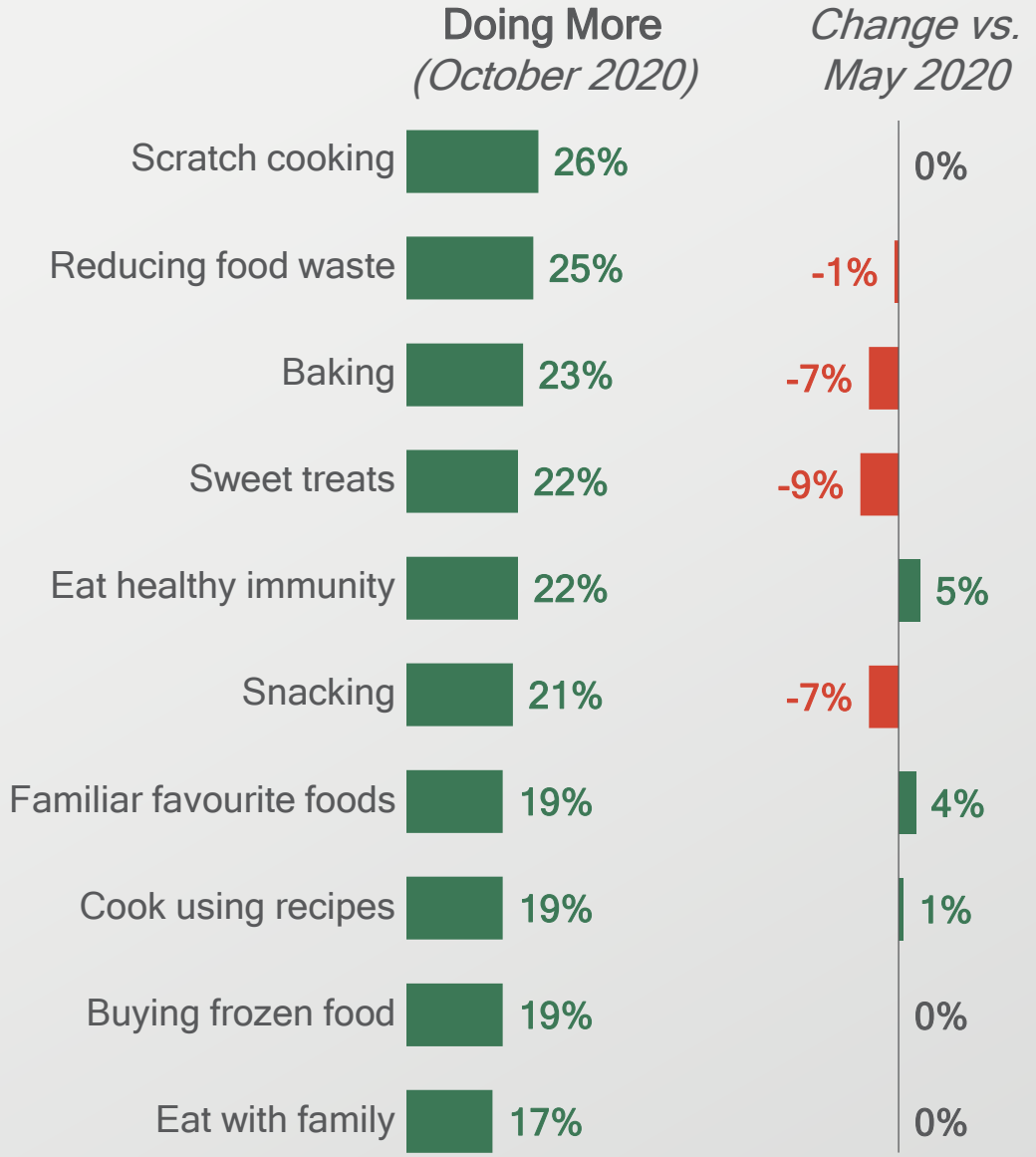
For each of these can you please choose whether these have become more or less important to you, or if Covid-19 has had no impact.

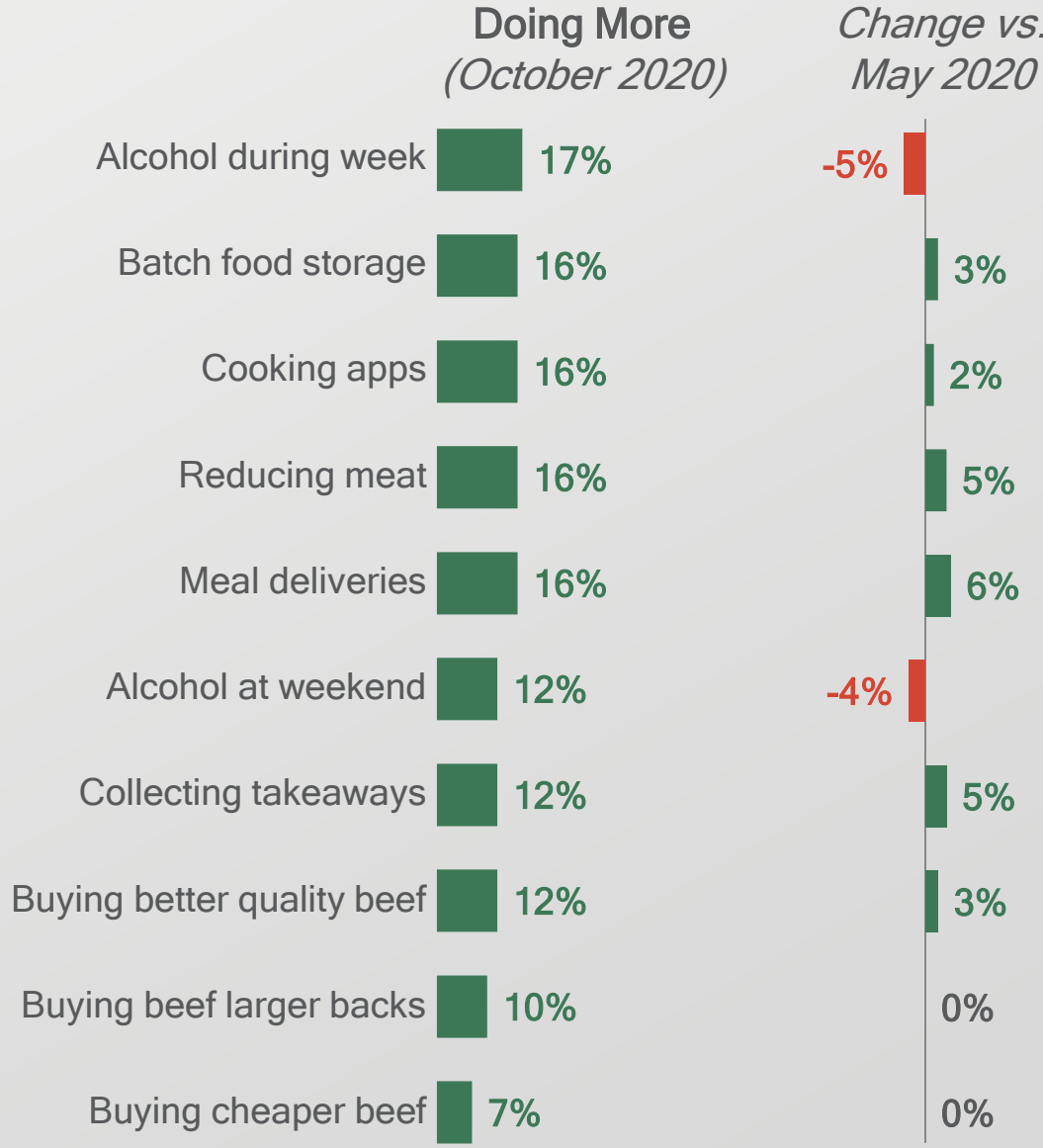
BORD BIA Thinking House

Food & Drink – Difference vs. May 2020

Coronavirus COVID-19

(Base: Adults 18+ in the United Kingdom, n=1,079)



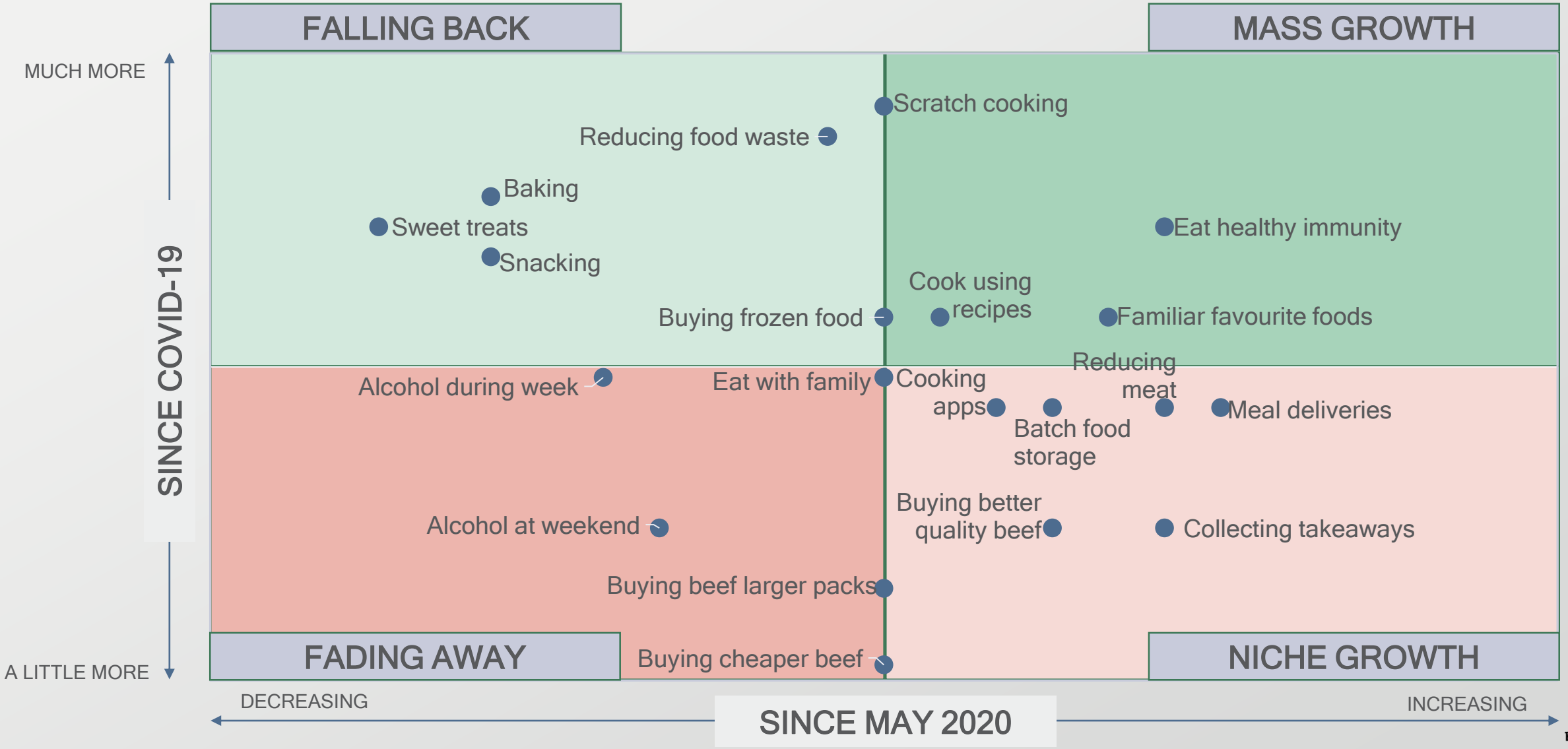


BORD BIA Thinking House

Food & Drink – Difference vs. May 2020

(Base: Adults 18+ in the United Kingdom, n=1,079)

Coronavirus COVID-19



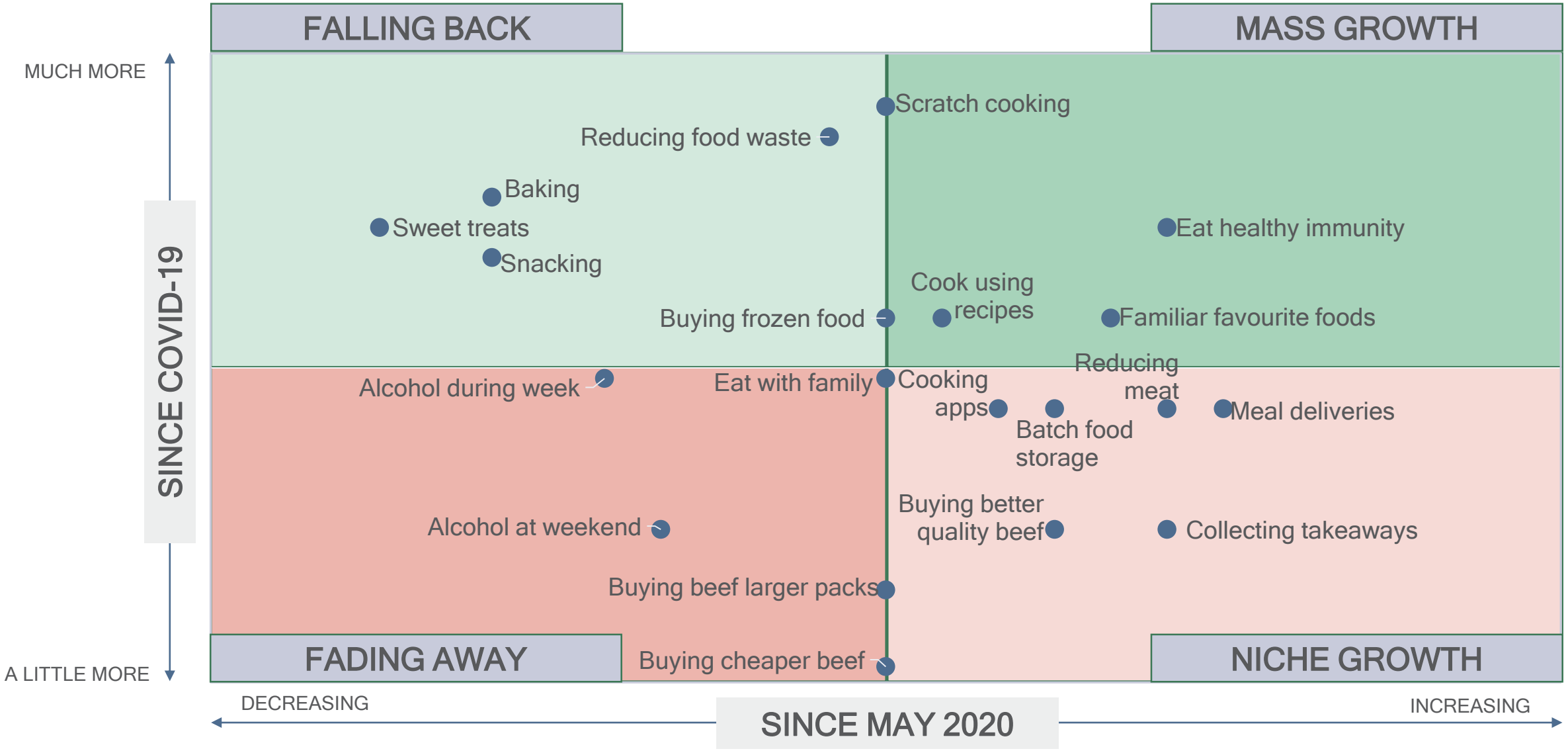
BORD BIA Thinking House

Food & Drink – Difference vs. May 2020

(Base: Adults 18+ in the United Kingdom, n=1,079)

Validators

Coronavirus COVID-19



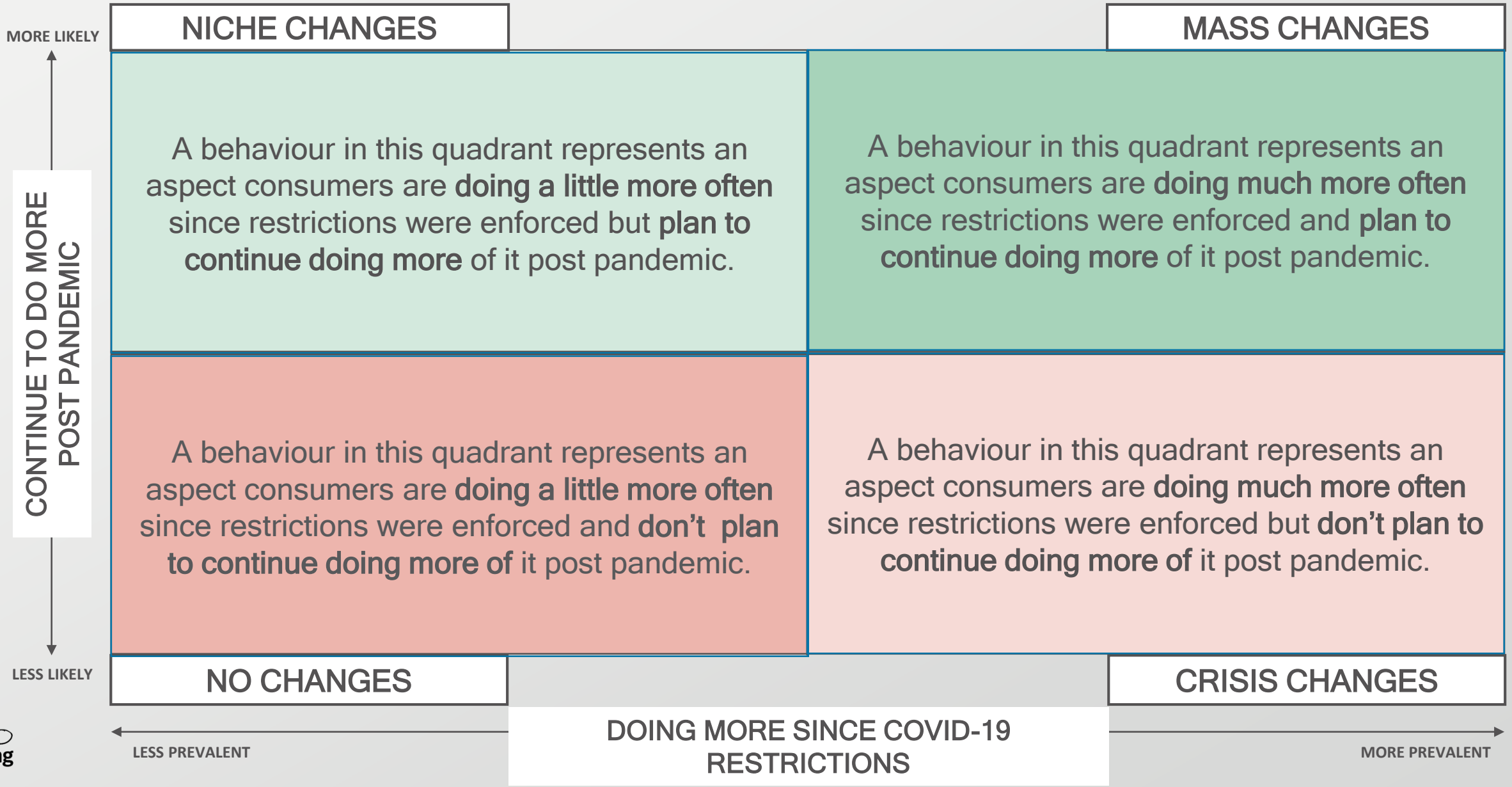


BRINGING IT ALTOGETHER

BORD BIA
Thinking House

The Covid Behaviour Change Matrix – What it means?

Coronavirus COVID-19



BORD BIA Thinking House

The Covid Behaviour Change Matri)

Coronavirus COVID-19



Planners

Coronavirus COVID-19

Welcome to the Planners section of the toolkit.

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

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

THINK	PLAN	DO

BORD BIA Thinking House

Planners

Coronavirus COVID-19

THINK

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

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

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

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

BORD BIA Thinking House

1. Indicator Mapping

Planners

Coronavirus COVID-19

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

General Behaviours







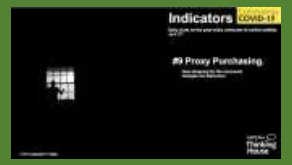




Shopping Behaviours











Consumption Behaviours

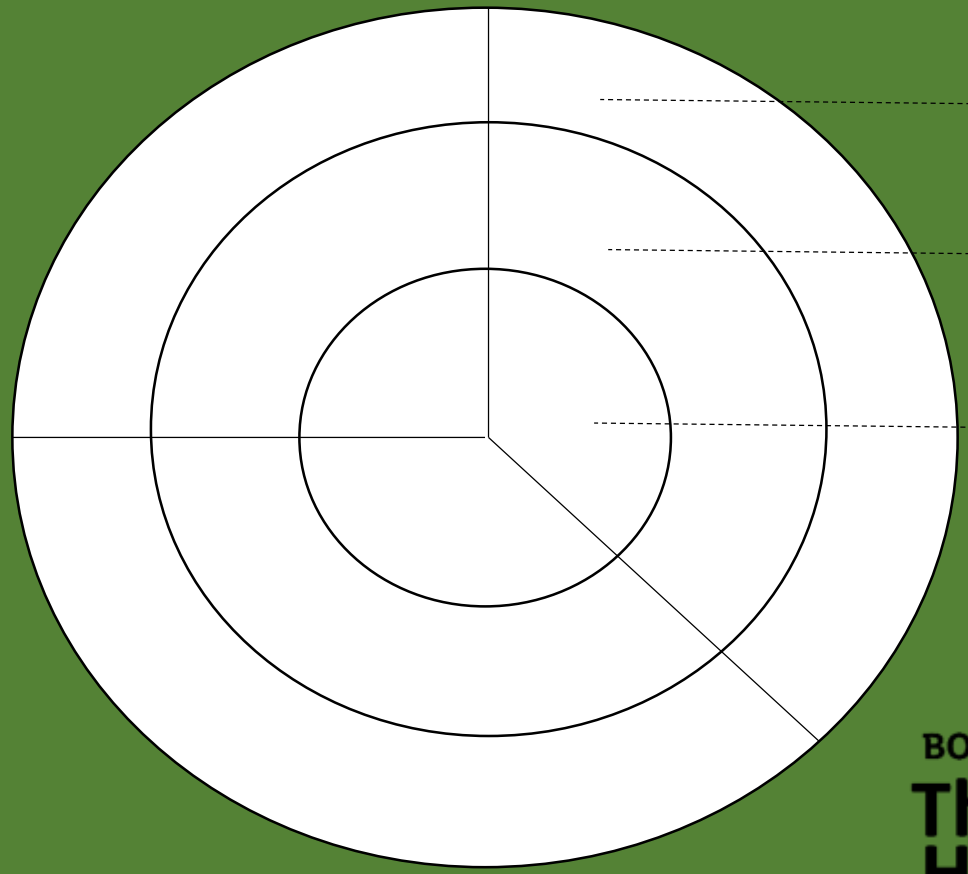








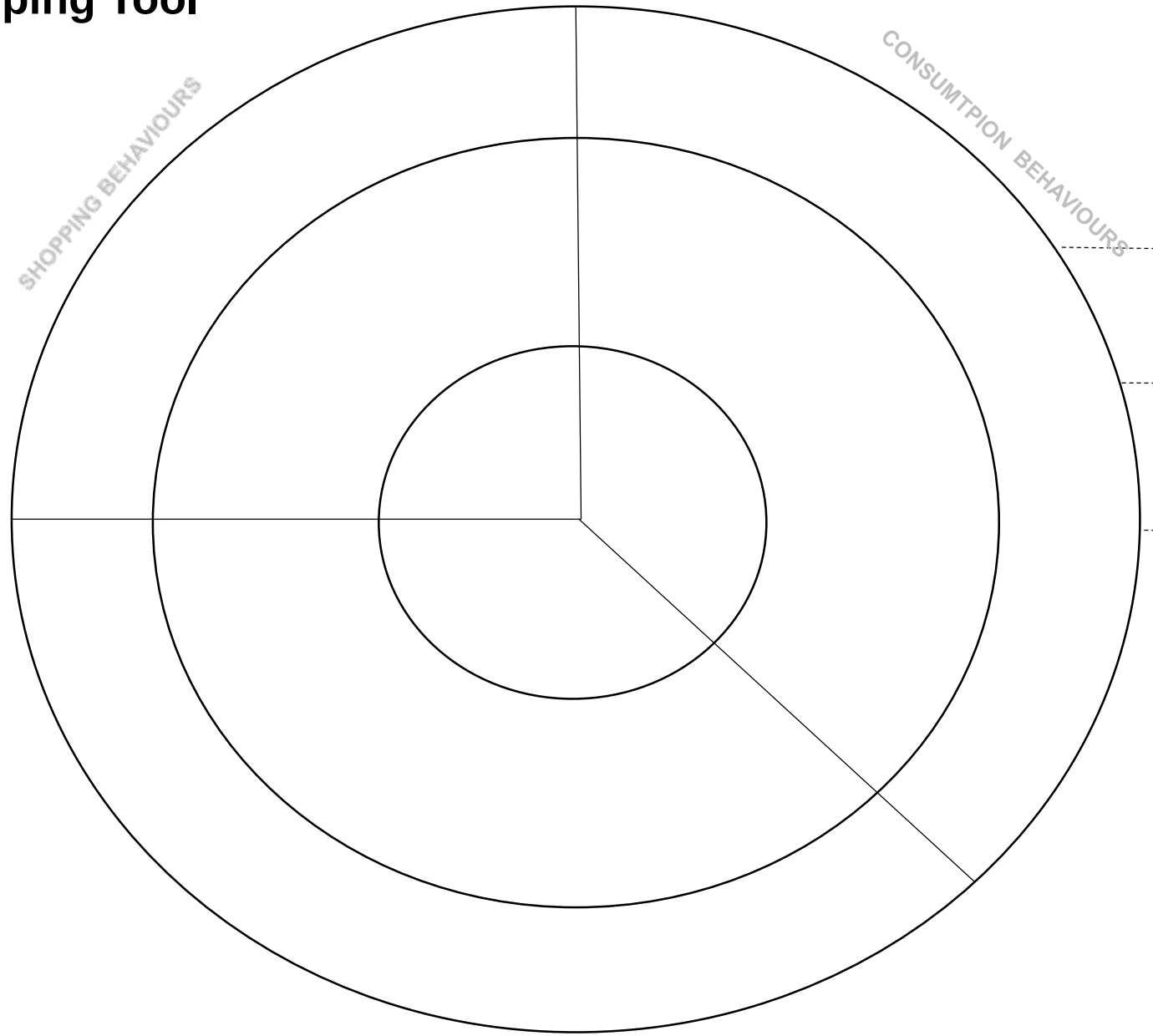




BORD BIA Thinking House

Indicator Mapping Tool

Coronavirus
COVID-19



Low Impact Zone

Med Impact Zone

High Impact Zone

BORD BIA
Thinking House

2. Pressure Test

Planners

Coronavirus COVID-19

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

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

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

BORD BIA Thinking House

Pressure Test Tool

Coronavirus COVID-19

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

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

Scribble your notes here....

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

BORD BIA Thinking House

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.

BORD BIA Thinking House

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

BORD BIA Thinking House

Now & Next Tool

Coronavirus COVID-19

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

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

I

Now

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

Pathways

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

Next

A list of the ambitions that are next for your business

Prioritisation

1 your first ambition

2 your second ambition

3 your third ambition

BORD BIA Thinking House

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

BORD BIA Thinking House

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…….……

BORD BIA Thinking House

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.

BORD BIA Thinking House

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.



BORD BIA Thinking House

Coronavirus
COVID-19

Action Plan

Capture Your Future Proofed Plans On A Page

Business Issue: .....

.....

Activity Goal: .....

.....

Actions: .....

.....

.....

.....

BORD BIA Thinking House

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	

Coronavirus
COVID-19

Future Proofing Toolkit

BORD BIA
Thinking House