NEW NORMAL

FOOD & DRINK CONSUMPTION HABITS

The impact of the pandemic on the way we eat and drink in and out of the home

REPORT by zinklar

zinklar

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1. **EXECUTIVE** SUMMARY

Consumer behavior evolves progressively, not abruptly. That belief blew to pieces once the COVID-19 pandemic hit consumers globally. A few waves later, we as consumers have adapted our way of life to the ups and downs of the virus prevalence and the evolving health recommendations. In a world where we have learned to socialize through videoconference, work from home, and buy a lot more of our products and services online, it is clear that the food and drink consumption was not going to stay still. And it has not.

- **54% of consumers worldwide declare that they have changed how they eat and drink since the pandemic started.** 11% say that the level of change has been significant. Change has been more critical among the younger population, which is more adaptable and open to adopting new behaviors.
- **Health and wellbeing have been at the heart of the change.** For a couple of years, we have received plenty of information about how to prevent the spread of COVID cases, how to protect ourselves, and how we should cope with physical and mental well-being. Not surprising then that 51% of consumers declare to eat now more healthily.
- **The return to the exact old patterns is unlikely.** Speaking to many insights experts, I have always received the same question? Will consumers keep the new consumption habits, or will they be back to what they did before? These dilemmas only have a possible answer. Consumers will do both, but to what extent? Consumers that believe that new habits are to stay surpass comfortably the ones that believe that their consumption will return to what it was.
- **Eat-in is the new eat-out.** Consumers have been forced to replace eating out with different ways to treat themselves. One way has been accessing more often delivery services, which have particularly boomed in countries like the US and Mexico. The other way has been to cook at home some of the meals people used to consume out-of-home.
- **Sustainability is diverse.** Consumers world-wide identify the use of natural ingredients as one factor that influences their food and drinks purchase. But whereas in France, buying local products is extremely important, there is a higher interest in sustainable or waste-free packaging in the UK.

This survey's findings help brands adapt their offers and messages to today's consumers' preferences. The quantification of the impact for every category will require a deep dive and, despite we once believed it was not needed, a regular check to early detect changes in consumer behavior patterns that are not stable anymore.

2. FOOD AND DRINK CONSUMPTION IS NOT WHAT IT WAS BEFORE

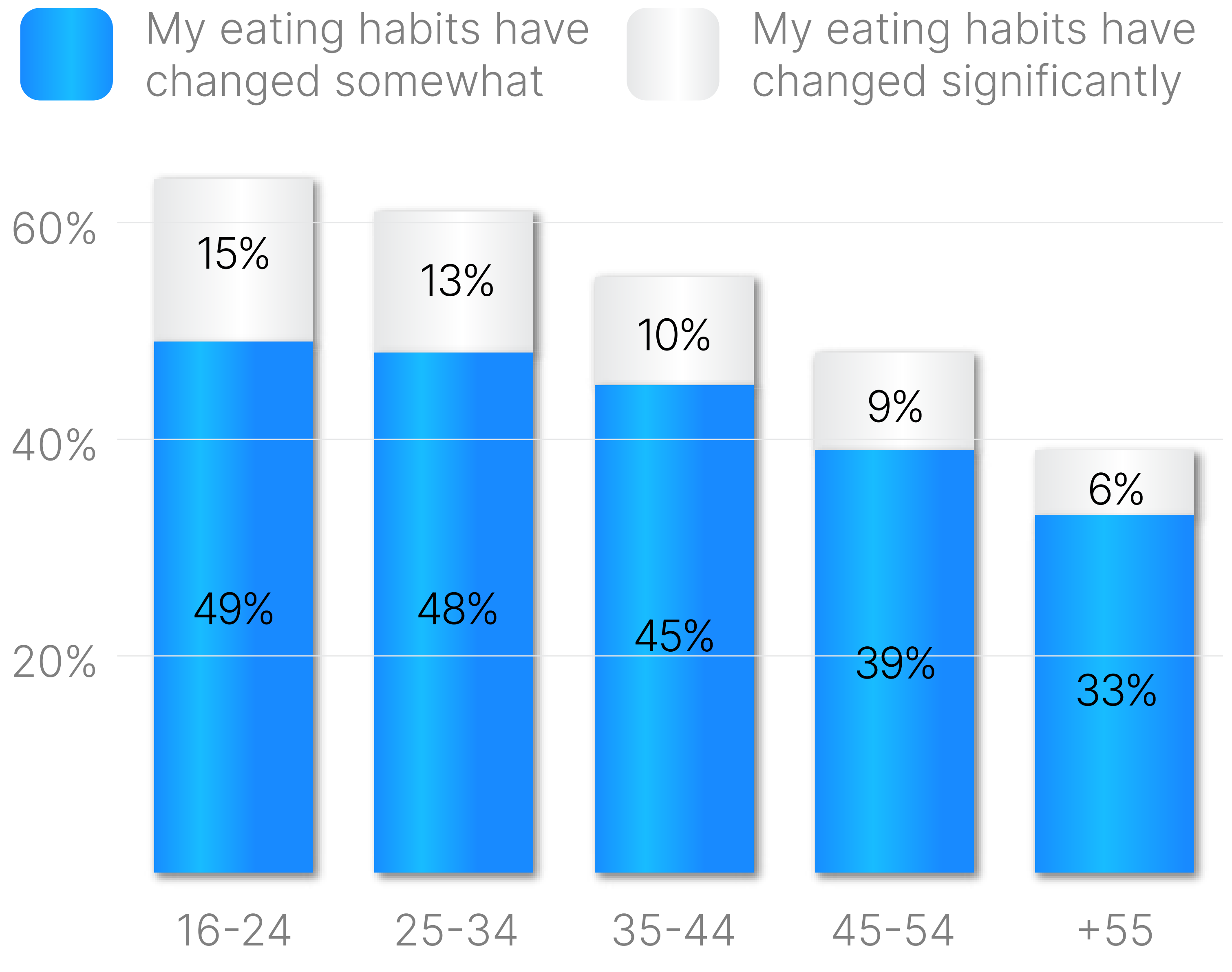
Food and drink habits changed. **54% of consumers surveyed agreed with this view and 11% considered this change significant**. With all the disruption caused by the pandemic, we could anticipate that food and drink consumption, where health is part of many of our choices, would be affected. The extent of this change, however, varies among different groups of consumers.

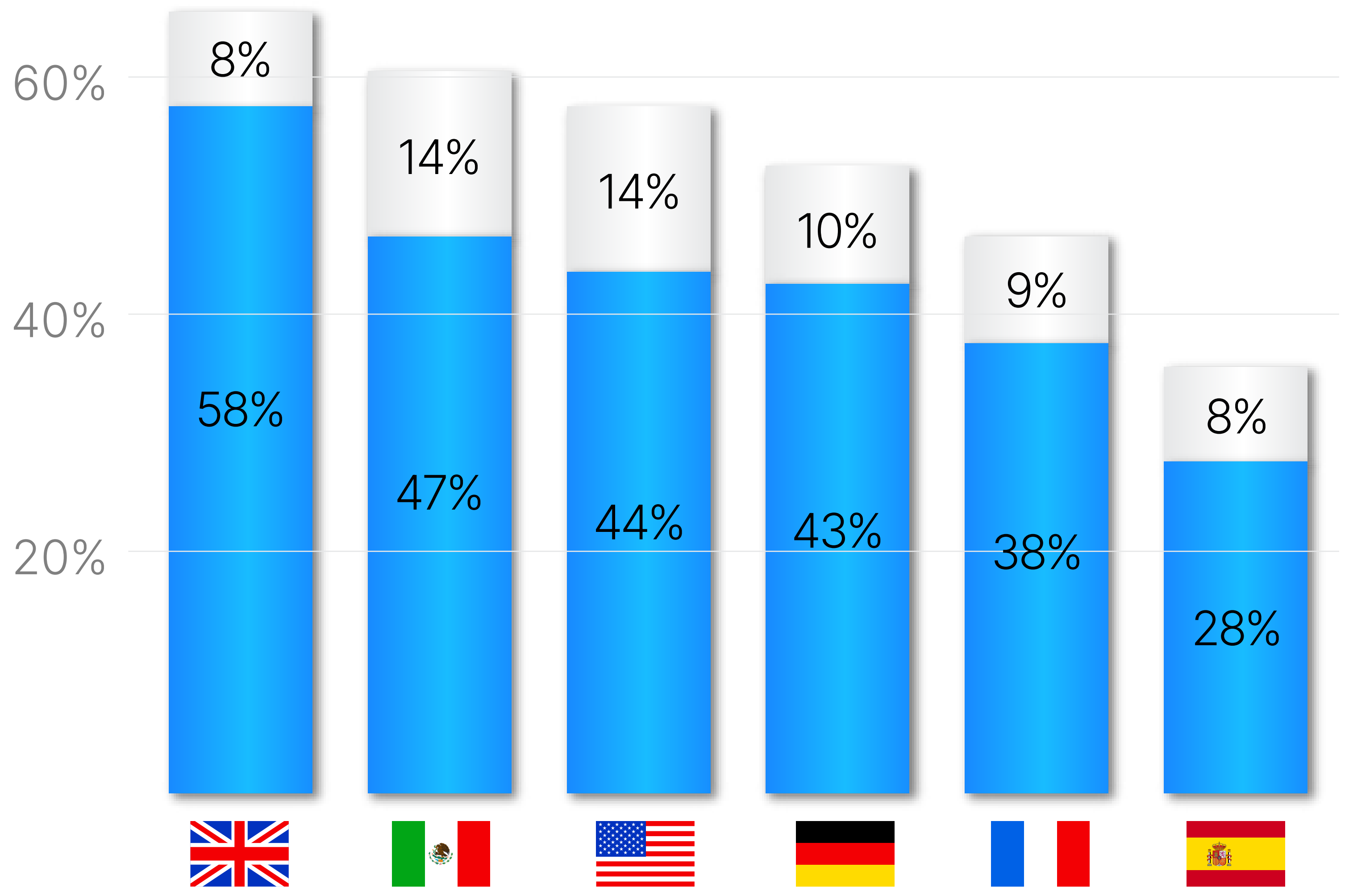
The young population perceives having changed their food and drink consumption habits more drastically. **64% of consumers between 16 and 24 years old declare having changed their habits, and 15% perceive this change as significant**. This creates a huge opportunity for brands that can influence consumption among these consumers and shape habits that tend to become stickier as they age.

54% Have changed their eating habits

11% Have changed them significantly

The pandemic also affected countries differently due to a combination of prevalence and measures to cope with the challenges taken at the local level. **The UK was the country surveyed where more consumers, 66%, declared to have changed consumption habits.** On the other side of the spectrum, Spain is the country where the pandemic brought less impact, with only 36% of the population declaring having modified food and drink consumption habits. Once more, we need to look into the country by country data when analyzing opportunities for brands to tap into new habits internationally and not assume that what we see in a particular country may also be a trend elsewhere.

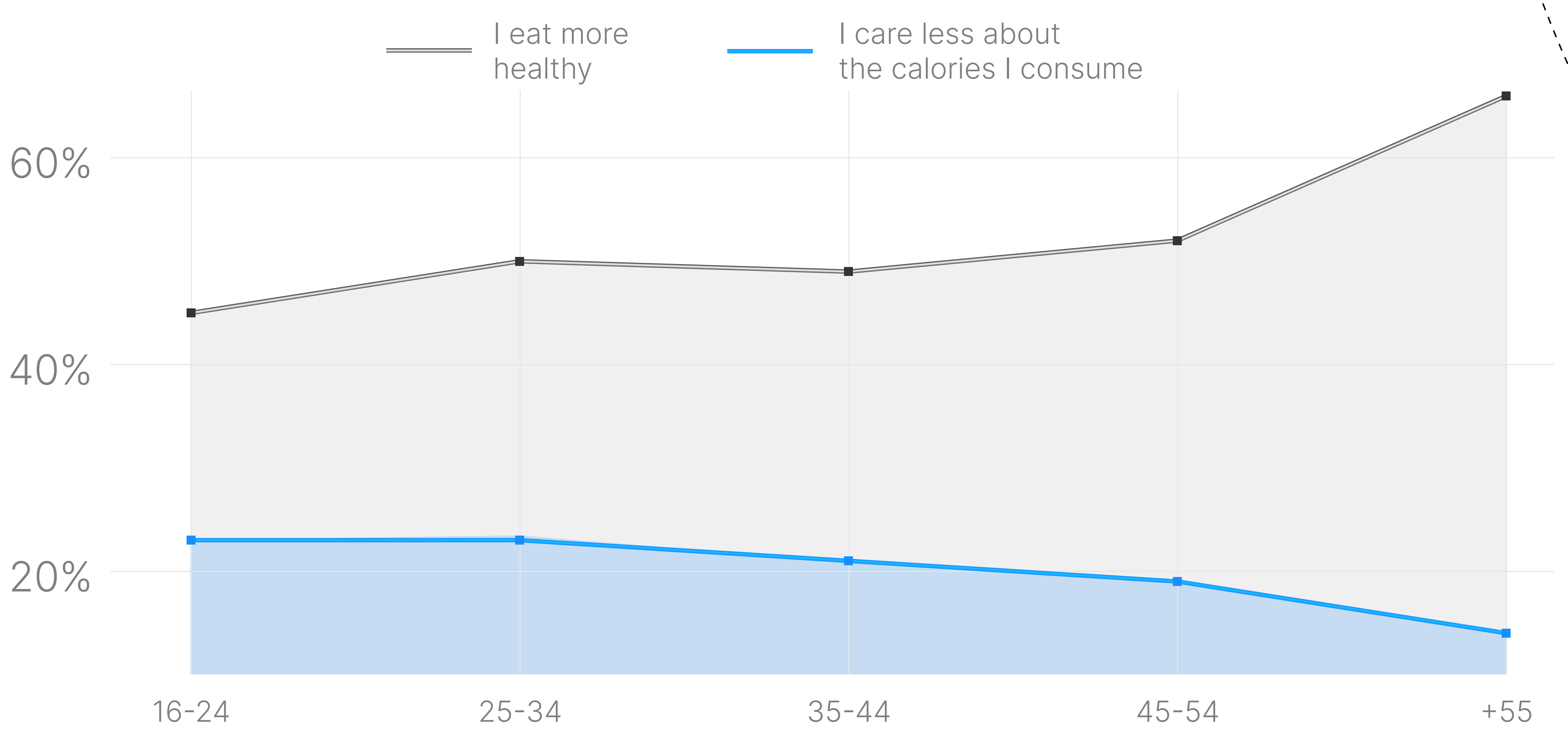




3. **SEARCHING FOR** HEALTHIER FOOD AND DRINKS

The need for everyone to play a role in preventing COVID from spreading and making the most to keep healthy was a key factor influencing food and drinks purchase and consumption decisions. **51% of consumers surveyed stated they eat now more healthily.** Consumers over 55 years, the population with a higher risk of COVID-19 were also more consciously making an effort to do that. Not surprisingly, the younger population 16-24 was less active in searching for healthier diets, yet 45% did it. However, there is much more than health for this group, and brands need to combine the increased attention to balanced diets with the other needs that younger consumers are willing to meet. Health is important, but not everything when it comes to choosing our food and drinks.

In what sense your consumption habits have changed?



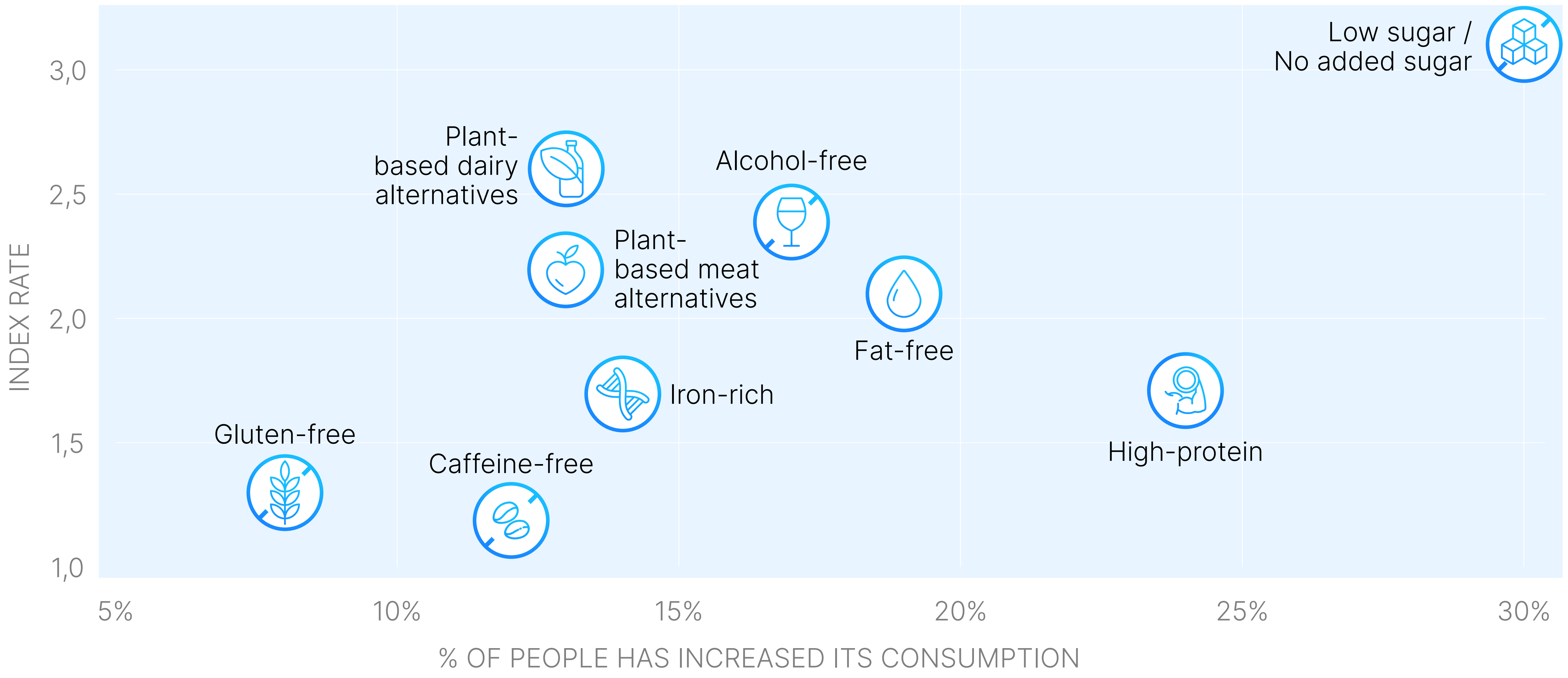
Low or free from added sugar and high-protein are the products that consumers declare have started to include more in their diets, with 29% and 24% mentioning them. It is interesting to see that these nutritional claims have been mentioned even more often than fat-free, which appear in the third position with 19%. Options with low or free from added sugar receive more attention across all the markets surveyed. **However, high-protein products are becoming much more trendy in some particular countries, like the US, where up to 35% of consumers say they have recently included them in their diets.** This shows much potential for high-protein products elsewhere if brands make a strong case for high-protein products as part of a healthy diet.

4. ARE NEW HABITS HERE TO STAY?

This is probably the million-dollar question for brands that have been favored by consumers over the pandemic period. These dilemmas are never black and white. People will definitely do both things to a certain extent. Those emerging trends that were already there and were simply accelerated by the pandemic are more likely to stay. Those that were unforeseen before and consumers adopted them mainly to cope with the temporary situation will probably disappear progressively.

An example will be the adoption of new categories where we can look into what is the proportion of consumers that declare they will continue buying them over the consumers that will return to normal consumption patterns. According to the survey, adoption of new categories drives long-term behavior changes, since the number of consumers saying they will continue buying these categories is always higher.

Products that people have started to consume since the beginning of the pandemic

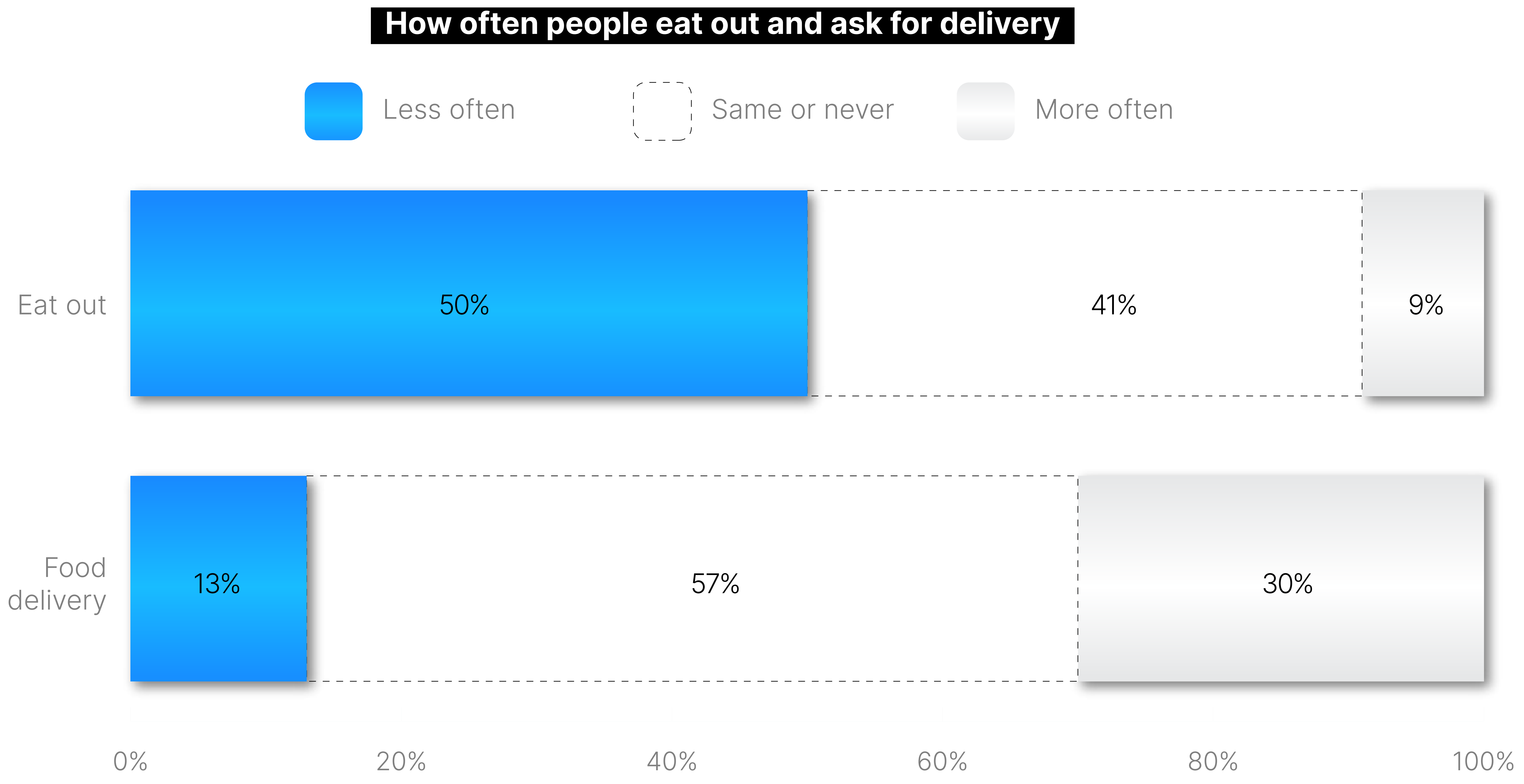


- **Low and without added sugar products** stay ahead of the others. Consumers that declared they will continue choosing these products triple the ones saying they will go back to previous patterns.
- **Plant-based dairy products, alcohol-free drinks, plant-based meat alternatives and fat-free products** are next with more than double the consumers anticipating continuing to have them in the baskets going forward.
- All other categories surveyed - **caffeine-free drinks** and **high-protein**, **iron-rich** and **gluten-free** products are also seen to continue being chosen by more consumers.

5. EAT IN IS THE NEW EAT OUT

Lockdown and other restrictions designed to contain the spread of COVID-19 were adopted widely across the globe, which had a noticeable impact on eating-out consumer behavior. **Half of the consumers declared to eat out less often than before the pandemic**. It is important to underline that consumers have reduced to a certain extent the frequency they go to eat out, but the special occasion behind eating out has stayed. Consumers now experience these occasions differently.

- **30% of consumers declare using more often food delivery services**. Some meals they consumed at restaurants and bars are now brought home. That way, consumers can continue to experience many benefits of the experience in an alternative way.
- **Consumers are replacing some of the eating-out occasions with homemade recipes cooked at home:** sweet treats like cakes and desserts and traditional meals from other countries have been included now in their repertoires.



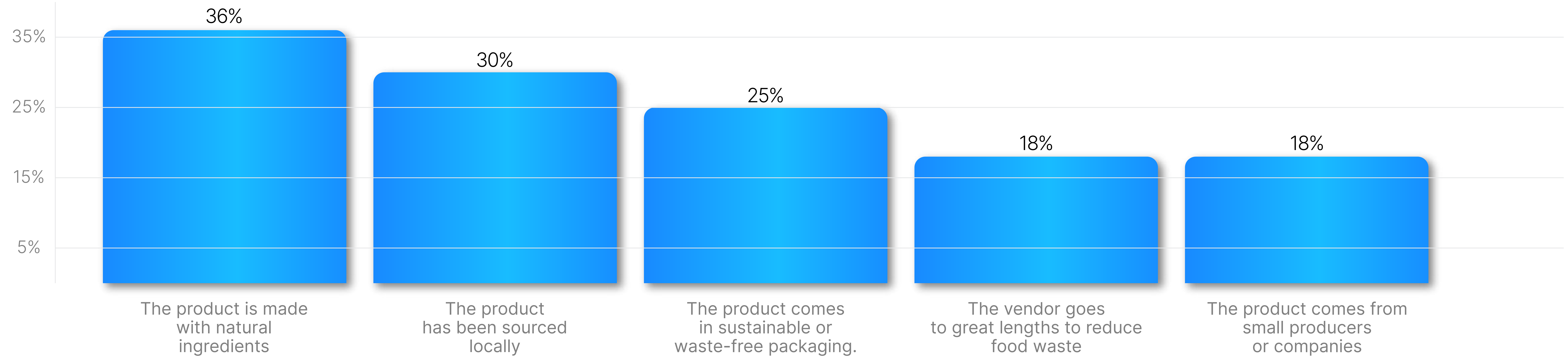
6. **SUSTAINABILITY** HAS DIFFERENT MEANINGS...

Over the last few years, sustainability has been at the heart of many brands' strategies that have made significant efforts to evolve their products and communication. The survey findings show that there is a broad agreement on the key priorities, and at the same time, there are significant cultural differences across markets.

Overall, consumers declare taking into account when making purchase decisions the fact that products are made with natural ingredients, are sourced locally, and come in sustainable or was-free packaging. After this, there are more differences than similarities. Whereas in the UK, the sustainability of the packaging tops the ranking, locally sourced products are way more important in France. Going to great lengths to reduce food waste is also a very important factor in France, Germany, and the UK, whereas consumers in the US, Mexico, and Spain put this factor lower down in the ranking.

This is a very important factor to build sustainable brands across markets. Since sustainability has different connotations, **it is vital to access the right insights to enter new markets successfully and avoid putting all previous efforts in jeopardy by choosing the wrong strategy locally**.

Which of the following aspects do you take into account when buying a food or a drink?



7. ACROSS THE WORLD

Mexico

77% of consumers in Mexico have tried new recipes at home. Youtube and Facebook are the two preferred sources of ideas, with 64% and 53% of consumers checking these channels to search for culinary inspiration. Having a good video and social media strategy is particularly important for brands in this market.

US

35% of consumers in the US have adopted high-protein products. Consumers perceive that proteins can increase energy levels, and this range of products is considered a healthier choice. 48% of the category adopters in the US expect to continue consuming these products in the future.

UK

Up to 66% of consumers in the UK perceive they have changed their eating and drinking habits. Meat consumption reduction is at the heart of this change since 21% of consumers declare having adopted plant-based meat alternatives since the beginning of the pandemic. Consumers in the UK are more interested in vegan diets and are able to access an offer that addresses the needs of this growing population.

France

The impact on eating out has been more ‘contained’ in France. 38% of the population claiming they eat out less often is still high but well below the average of 50% across all markets surveyed. France has been more successful in attracting consumers to restaurants and cafes once COVID measures have eased, which can be a source of learnings to be applied in other countries.

Germany

31% of German consumers declared having adopted consumption of alcohol-free drinks. They are more and more considered a healthier choice, and calorie reduction is a key driver when choosing this range of products. This adoption has been particularly high in two consumer segments. Firstly, the younger ones, more inclined to try new options, and people over 55 who were at higher risk for severe COVID-19, which was frequently associated with being overweight.

Spain

32% of consumers in Spain still do not use food delivery services. Despite the development of the offer in the country and elsewhere, there is still a lot of potential to convince new consumers to enter the market. The question is how, since the percentage of non-users raises to 54% for consumers over 55, a segment with more established routines that are more difficult to influence.

8. WHAT IS NEXT?

The disruption caused by the pandemic in food and drink consumption behavior is real and will cause long-term consequences. The survey sheds some light on the nature of these changes, and it also identifies additional questions about what brands and retailers need to do to prevent risks and tap into the opportunities created in the new context. As in any disruption, there will be winners and losers. A good understanding of new habits in specific categories, segments of consumers, and occasions is required by every brand to make sure that decisions are made taking into account what consumers do and think today. Brands that count with a better understanding of consumers will be better placed to anticipate their competitors as we leave the pandemic behind.

9. METHODOLOGY

The survey that supports this report was conducted in March 2022 through the Zinklar insights platform. 3,000 online interviews were undertaken across six markets: France, Germany, Mexico, Spain, UK and US.

10. ABOUT ZINKLAR

Zinklar helps all kinds of businesses to access consumer insights easily and at scale. With Zinklar brands make the right decision every single time, so they accelerate their growth and overtake their competitors.

- Maximum cost-efficiency through automation and AI.
- Insights available the same day.
- Support of a market research expert team to guide you every step of the way.
- The highest insights quality through world-class respondents and advanced quality controls.
- Complete global coverage.
- One single insights platform to cover all your research needs.
- Used by more than 250 blue-chip brands globally.

Please get in touch to find out more about how Zinklar can help you bring consumers to the heart of your decision-making.

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www.zinklar.com

hello@zinklar.com

linkedin.com/company/zinklar

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