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Changes in behaviour and attitudes to food in Danish households during Covid-19

Implications & opportunities for Danish food companies

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Background and design of survey

https://www.food-covid-19.org

- How consumer behaviour and attitudes to food have changed during the Covid-19 pandemic
- Online survey (web & smart phone)
- International survey with about 10,000 valid responses
- Danish sample: 1281 using representative quota sampling across education, household composition, gender and age
- 16 languages, including Danish

Special acknowledgement to Meike Janssen of the Copenhagen Business School

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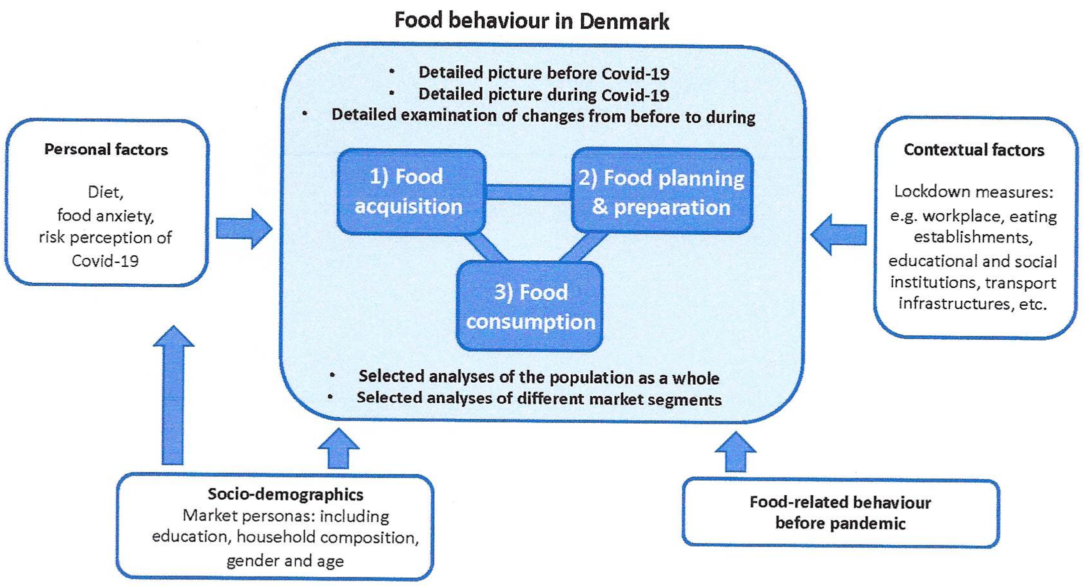
Conceptual overview of this analysis



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Food acquisition

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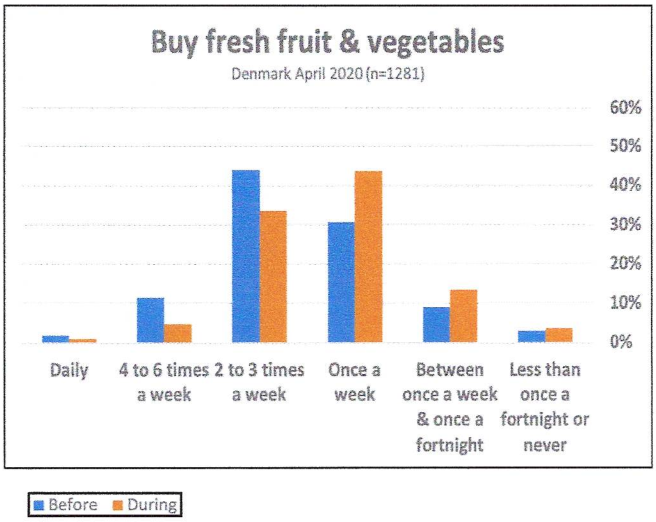
People buy food less often – buy more with longer shelf life



- All food products bought much less frequently
- This does not mean they purchase less food overall
- A small but significant shift towards non-fresh foods with a longer shelf life.

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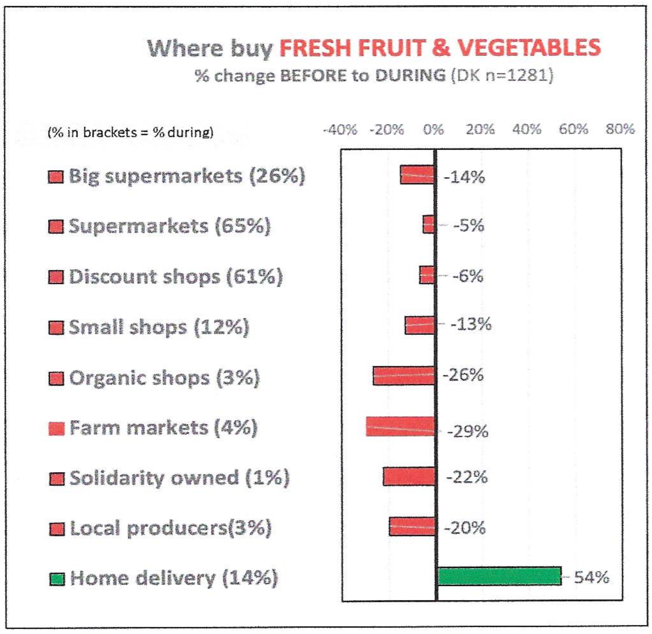
Strong move to home delivery – away from large & specialist shops



- Strong shift away from all traditional food outlets.
- Smaller supermarkets and discount shops less affected
- Huge increase 50% - 65% in home delivery, mainly online
- But home delivery still only 10% - 14% of all shopping events, and highest for fresh food.

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Food planning and preparation

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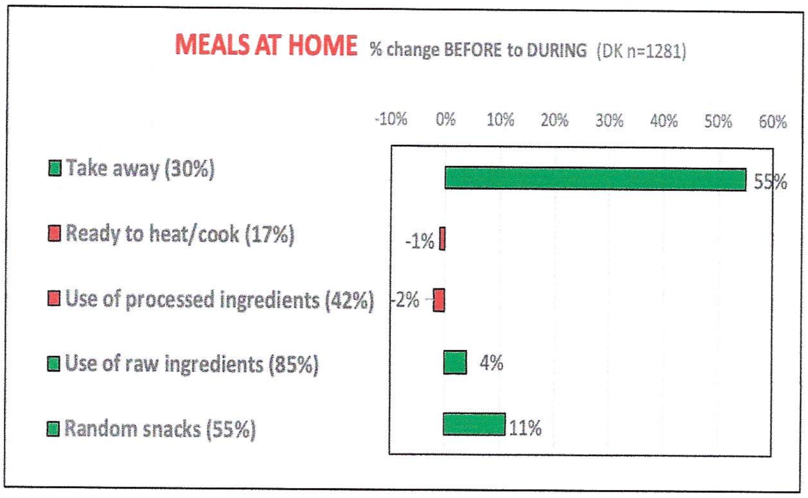
Shift to take-away, random snacks and raw ingredients



- Small reductions in other forms of meal preparation
- More people are at home during the day and eat breakfast and their midday meal at home.

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Food consumption

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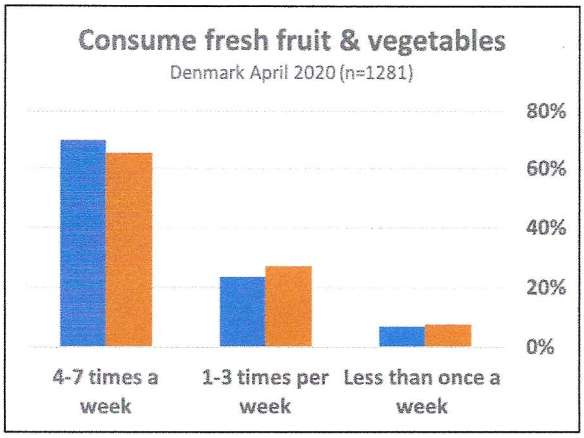
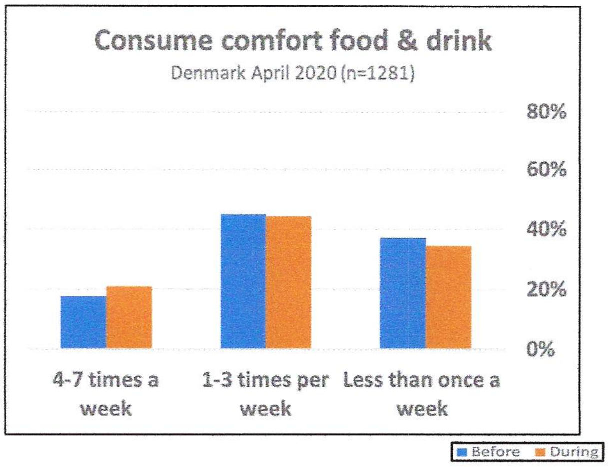
People eat fresh food less often and comfort food more often





- Related to the strong overall decline in shopping frequency
- 'Comfort' foods and drinks: e.g. cake and biscuits, chocolate and candies, and alcohol
- Not necessarily eating less food

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How much food behaviour has changed and expectations whether this will continue

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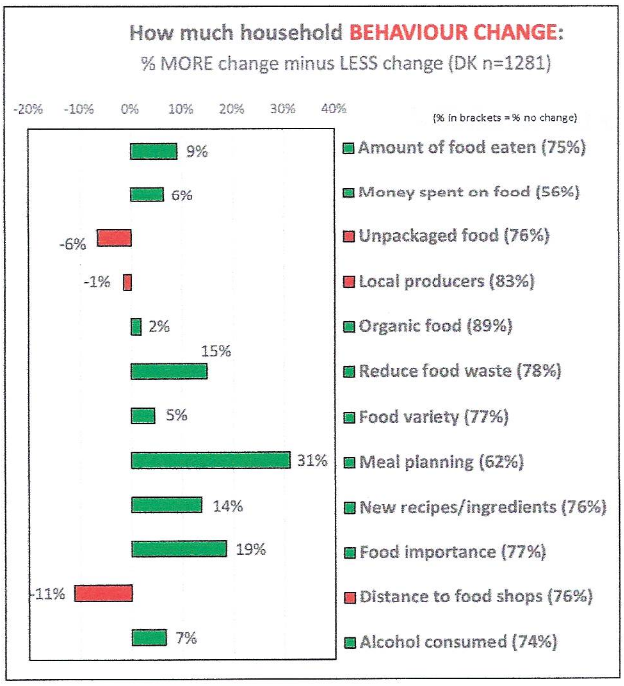
More food eaten, more money spent, more planning, variety and recipes

- Food becoming much more central in people's lives
- Significant food waste reductions and small, but significant, increase in organic food
- Move away from unpackaged food.
- Less distance travelled to food shops.



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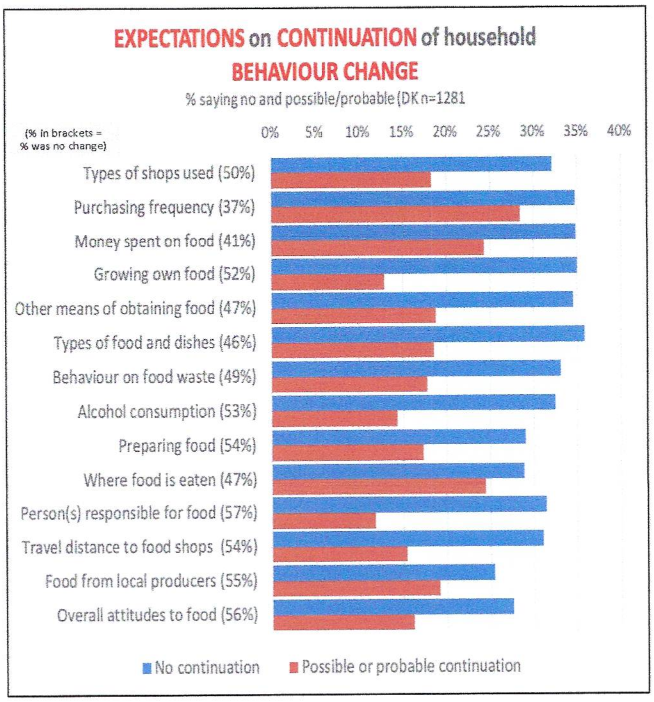
Over one-third say these changes are likely or will continue

Strongest expectations of continuation:

- Reduced shopping frequency
- Eating more food at home
- More money spent
- Local producers
- Reduced food waste
- Food preparation and variety

Only between 25%-35% say do NOT expect behaviour change to continue



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Market personas: education

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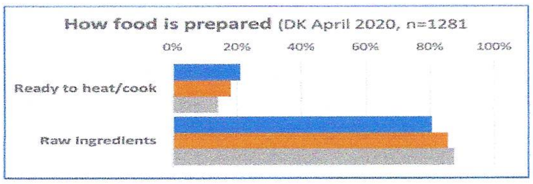
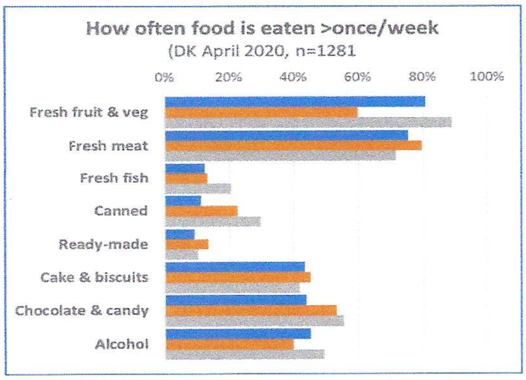
Higher educated have higher frequency of buying and eating fresh food





- Geater purchasing power and more awareness of health issues
- ... consume more comfort food and drink more frequently -- more likely to work from home
- .... use more raw ingredients and less ready meals

Low Medium High

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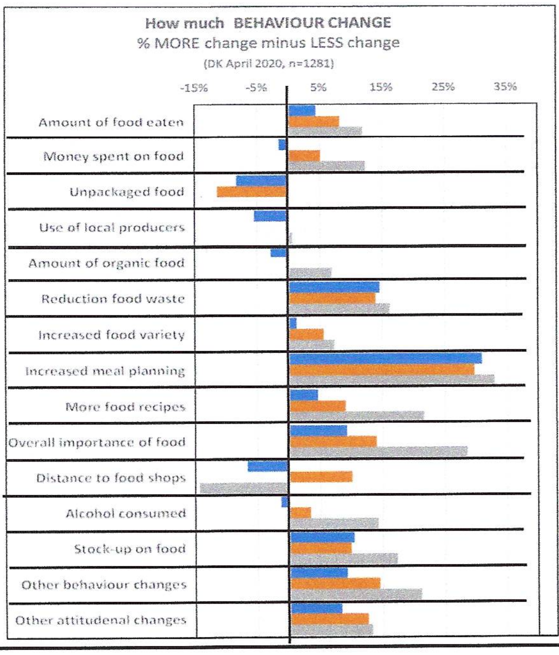
Higher educated changed food behaviour much more than lower educated



- Especially on amount eaten, money spent, reducing food waste, stocking-up on food and consuming alcohol.
- More organic, food planning and variety
- No change in use of unpackaged food
- Lower educated (not higher educated) reduced unpackaged food, organic consumption and use of local producers

Low Medium High

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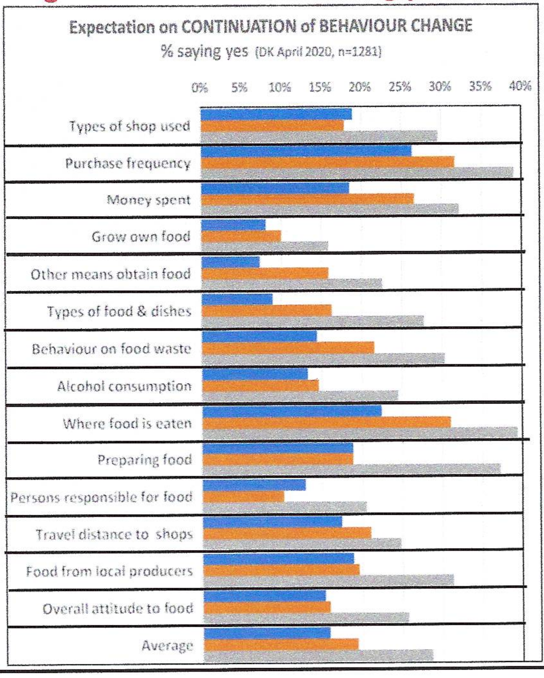
Higher educated more strongly committed to continue behaviour change



Across all categories, especially:

- purchase frequency
- more home eating
- more planning, variety and recipes in food preparation
- use of local producers
- reducing food waste

■ Low ■ Medium ■ High

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Market persons:
household composition

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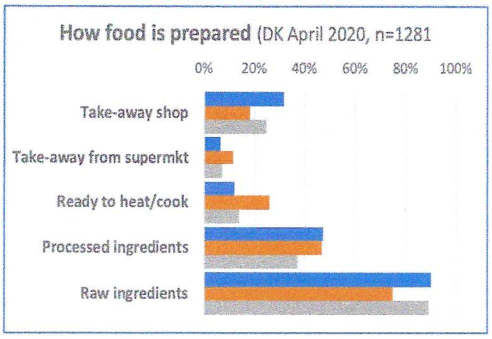
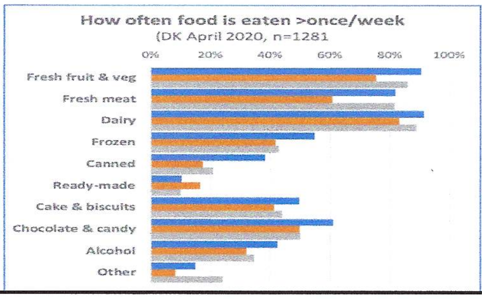
Households with children buy and eat fresh food more often, use more raw ingredients





- They are more likely to use take-away shops and consume comfort foods, including alcohol.
- Single person households are more likely to purchase ready-made food.

■ With children ■ Single ■ Only adults

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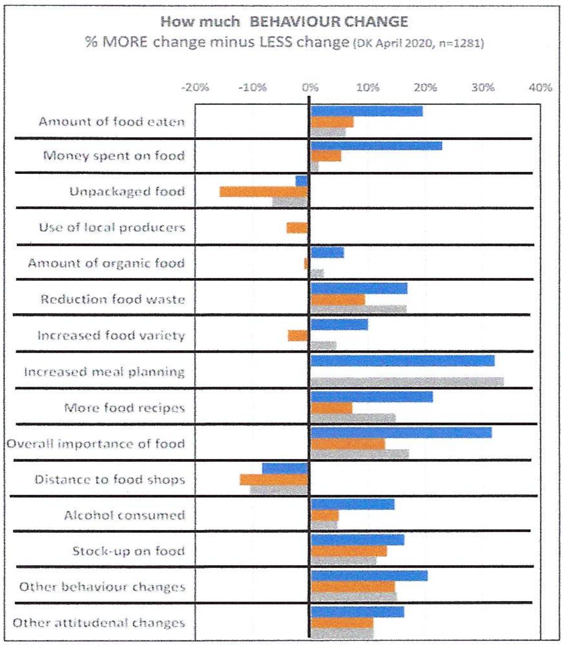
Households with children eat, spend, plan and stock-up more, throw away less



- Food is much more important
- Eat more organic food
- Drink more alcohol
- Singles household have not changed meal planning
- Adult-only households have increased meal planning

■ With children ■ Single ■ Only adults

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Households with children are more strongly committed to continue behaviour change

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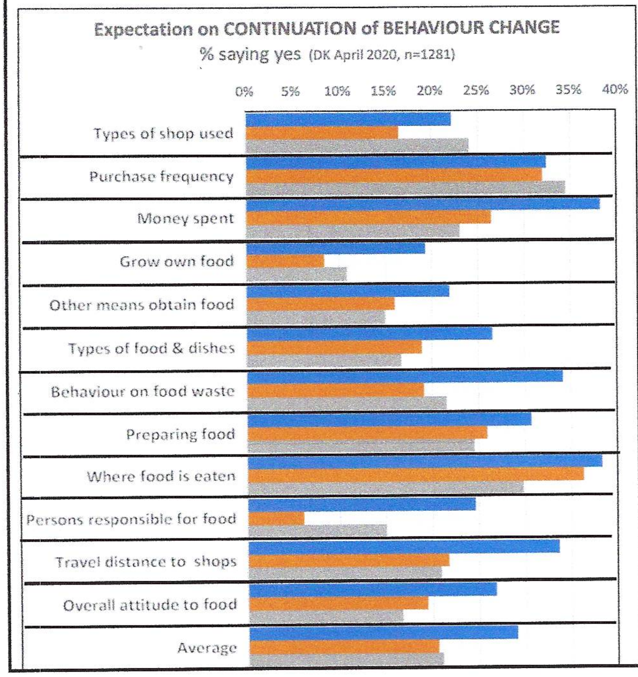

- ...they have more at stake?
- .....especially money spent, more home eating, throwing away less, closer to food shops and more time time preparing food
- Only in lower "purchase frequency" are households with children less likely to continue

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Market personas: gender

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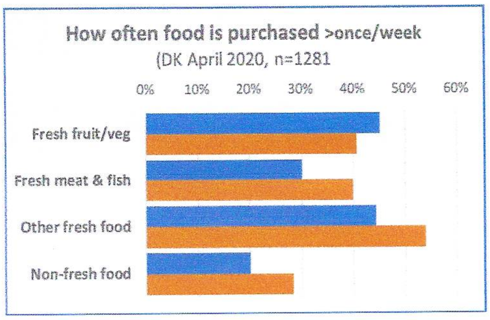
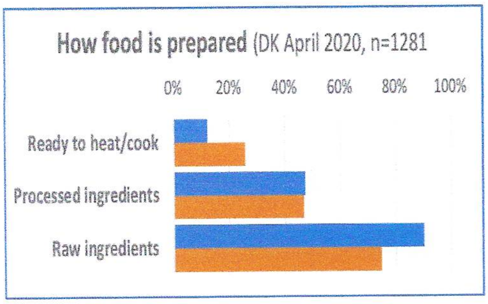
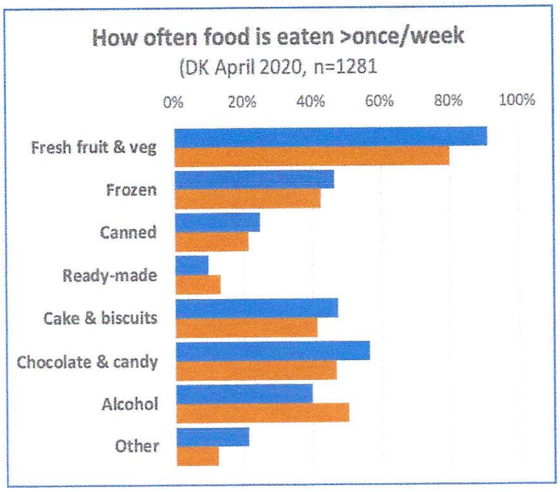
Women buy and eat fresh food more often and use more raw ingredients





Female Male



- ...but they buy other fresh food less often than men, and eat more cakes and candy
- Men buy non-fresh food more often, use more ready-made meals and drink more alcohol

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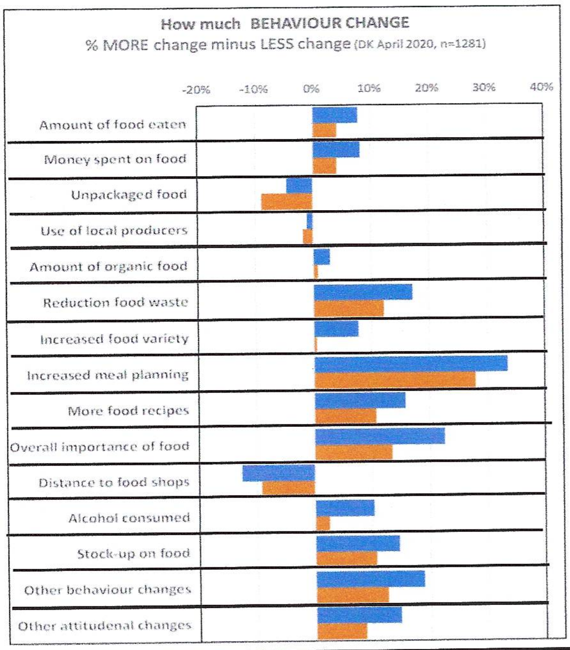
Women eat, spend, plan and stock-up more, throw away less



- Food is much more important
- Eat more organic food
- Are more adventurous with food than men

- Men use unpacked food less and have not increased their food variety

Female Male

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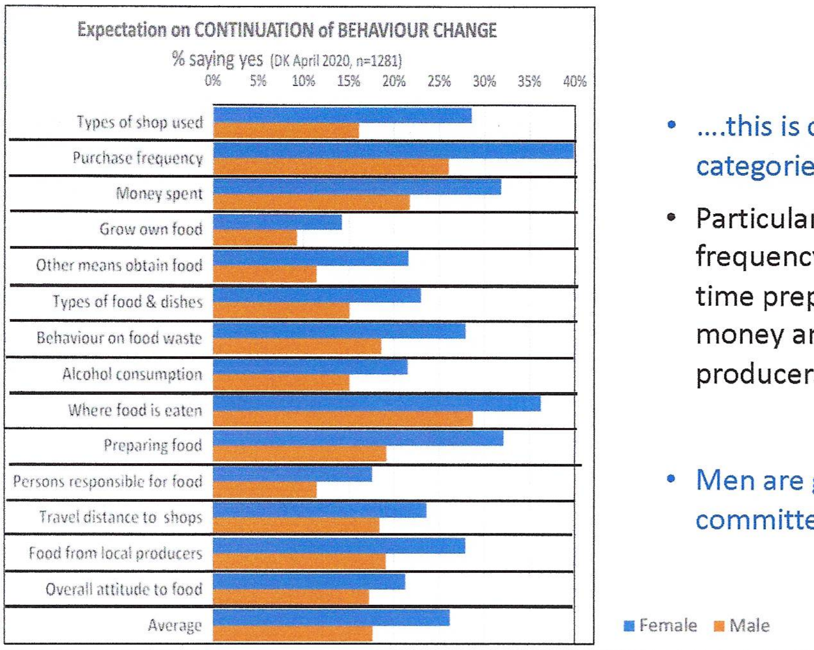
Women are more strongly committed to continue behaviour change



- ....this is consistent across all categories
- Particular reduced purchase frequency, more home eating, more time preparing food, spending more money and buying from local producers
- Men are generally positive but less committed than women

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Market personas: age

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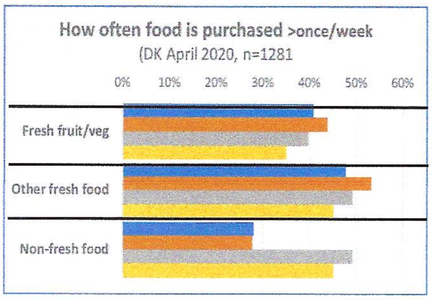
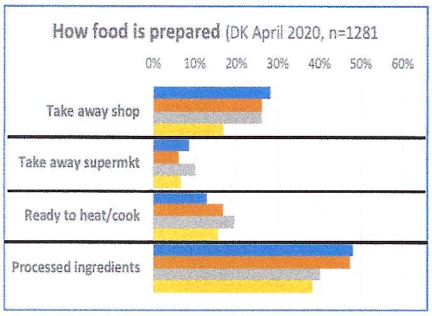
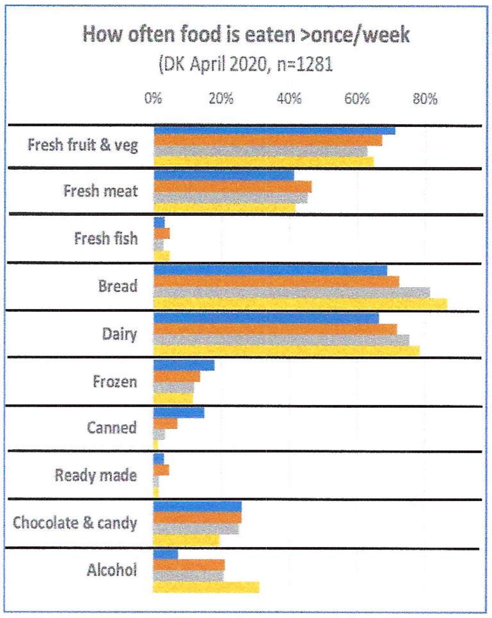
Younger people buy and eat fresh food more often





- ...they also buy more often from take-aways and use more processed ingredients
- Older people eat bread and dairy foods more often and drink more alcohol



■ 18-35 ■ 36-49 ■ 50-65 ■ >65

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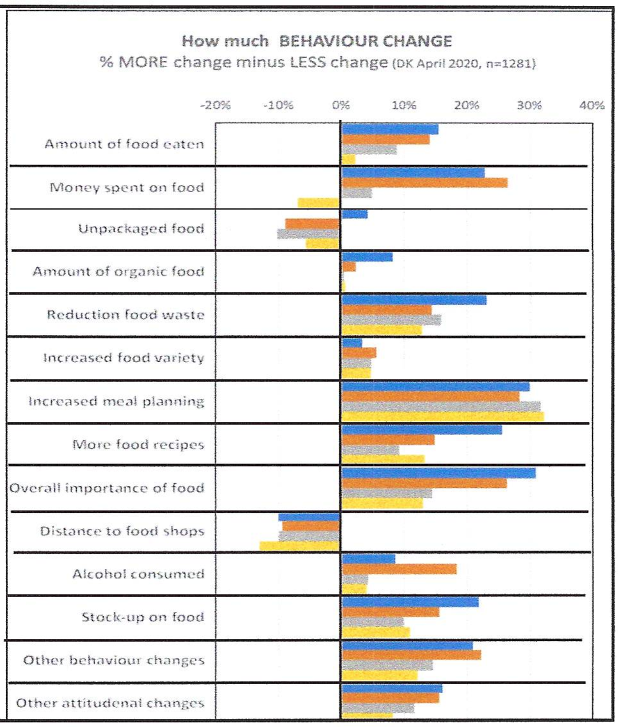
Younger people eat most unpackaged and organic food and throw less away

- ...they also stock-up more and think food is more important
- 36-45 year-olds spend most on food and drink most alcohol
- The oldest spend least on food, have reduced food waste least, and have the shortest distance to shops

■ 18-35 ■ 36-49 ■ 50-65 ■ >65



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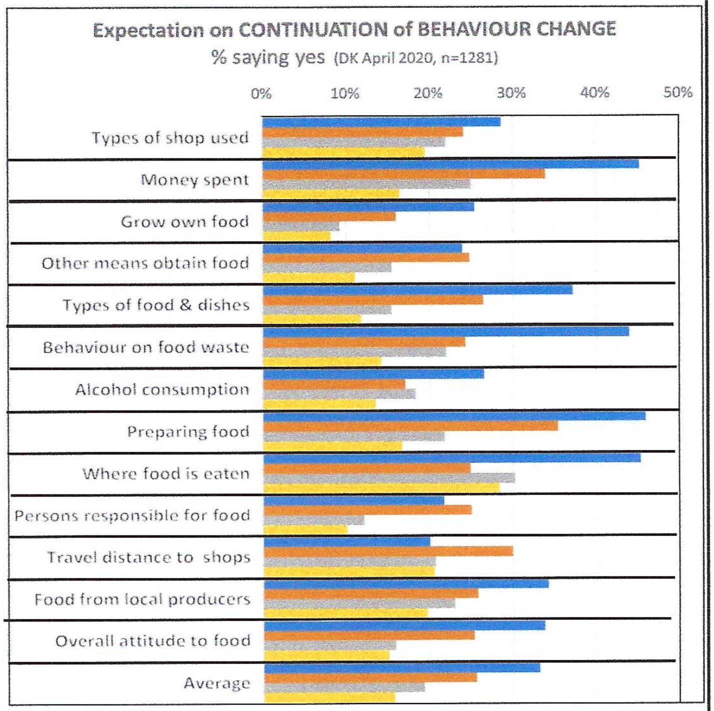
Younger people are consistently more committed to continue behaviour change

- ....except for who is responsible for food and distance to shops
- Especially strong on money spent, reducing food waste, variety and preparing food
- There is a clear negative age correlation across all expectations



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Overall conclusions and implications

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Overall conclusions

- Food, and food experiences, is in a stronger and more visible position
- More time and money spent
- More experimentation with new ingredients, varieties and recipes
- Greater use of raw ingredients, and waste a lot less food.
- Small overall increase in eating organic food.
- Sustainable trend : Only between 25% and 30% say definitely they will NOT go back to old habits

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Overall conclusions

DIFFERENT MARKET PERSONAS

- HIGHER EDUCATION
  - Buy and eat more fresh food, more organic, use more raw ingredients, throw less away, spend more, and expect to continue more
  - Consume more comfort food & alcohol
- HOUSEHOLDS
  - With children : Very similar to higher educated
  - Singles eat more ready-made
- WOMEN
  - Similar to higher educated
  - Have changed more compared to men and expect to continue
- YOUNGER PEOPLE
  - Similar to higher educated
  - Buy more take-away, use more processed ingredients

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Implications & opportunities for Danish food companies

- Need for all actors along the food value chain to respond with new innovations that meet consumers' changing tastes and desires for new food experiences.
- Invest in innovation
- Consider reduction of food waste and shelf life
- Know your market personas and continue to innovate for them
- New products and new experiences

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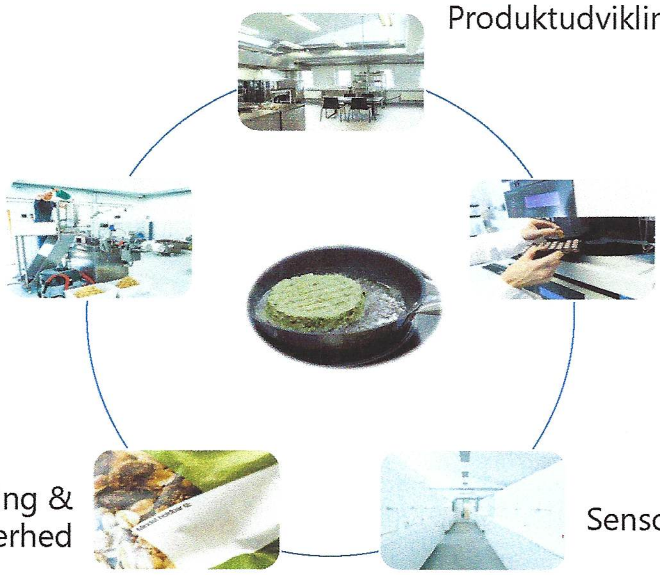
Få 360° hjælp på TI



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Hold dig orienteret

- Følg TI på linkedin

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