

FAST FACTS

Rediscovered Demand Spaces in a Global Pandemic

COVID-19 has caused large scale disruption in the way people live and work, redefining consumer behaviours along the way. Consumption habits have changed as people are spending more time at home, with long term implications beyond 2020.

This is the second in a series of five Fast Facts focused on diving into key consumption and purchase shifts brought on by COVID-19.



Accelerated Health



Rediscovered Demand Spaces



Sustainable Nutrition



Return to Value



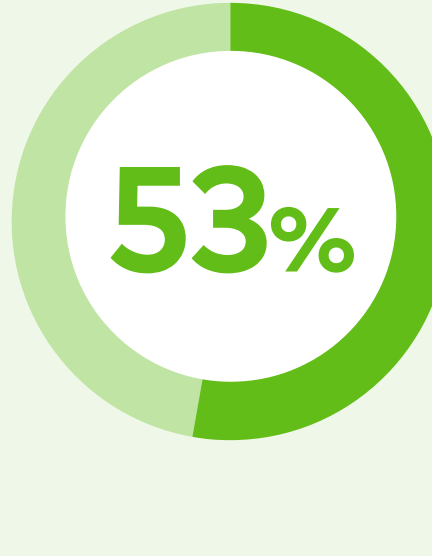
Sign Posted for Safety

People continue to avoid public places due to global social distancing measures, consumer anxiety, and a willingness to save money.

Percentage of global consumers who feel comfortable visiting the following locations (June 2020)¹



As a result, remote working has become part of the new normal, a trend set to continue for the foreseeable future.

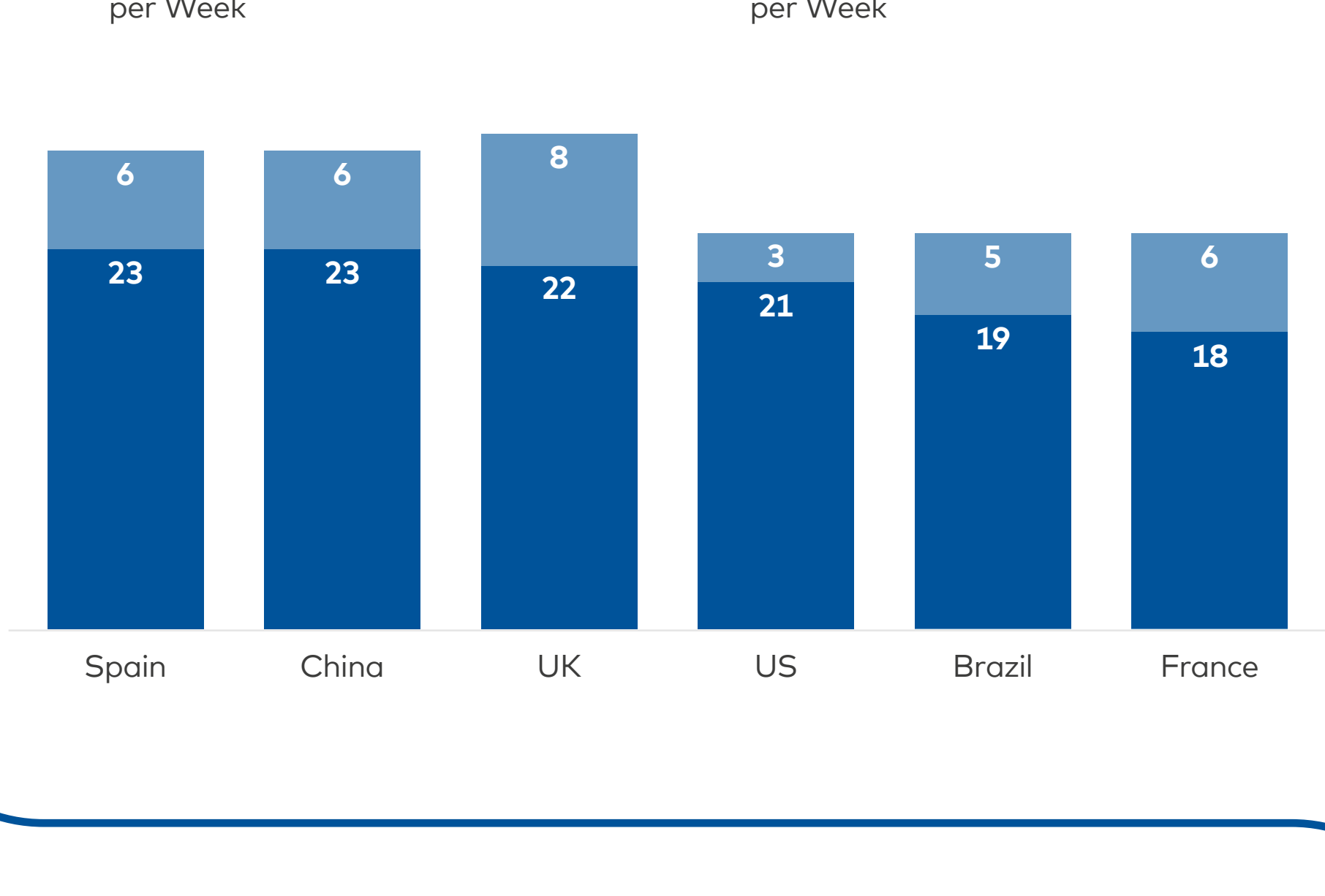


53% of people who never worked from home previously now plan to work from home more often in the future²

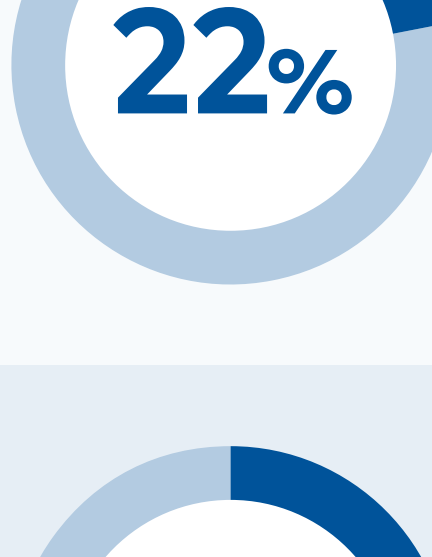
As people spend more time at home due to COVID-19, there has been an average of six additional "in-home" meal occasions per week.

Consumers are now putting more thought into their home-based meal routines and when they eat:

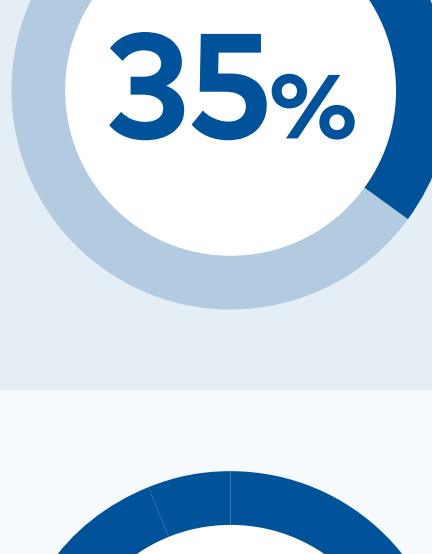
Number of In-Home Meal Occasions per Week²



For example consumers are making time for longer, more nutritional breakfasts:



22% of UK breakfast eaters have spent more time eating breakfast since the COVID-19 restrictions were put in place³



35% of Chinese consumers have cooked breakfast at home at least 4-5 times a week during the last 6 months⁴

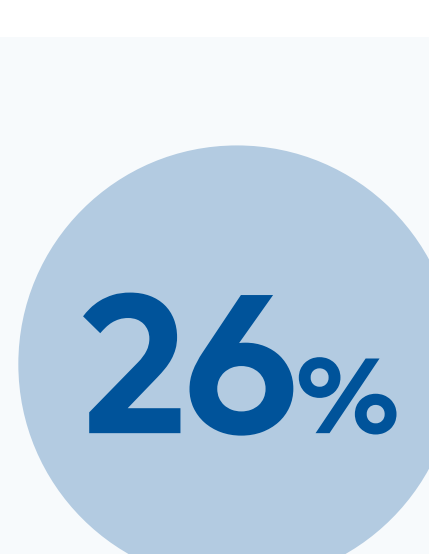
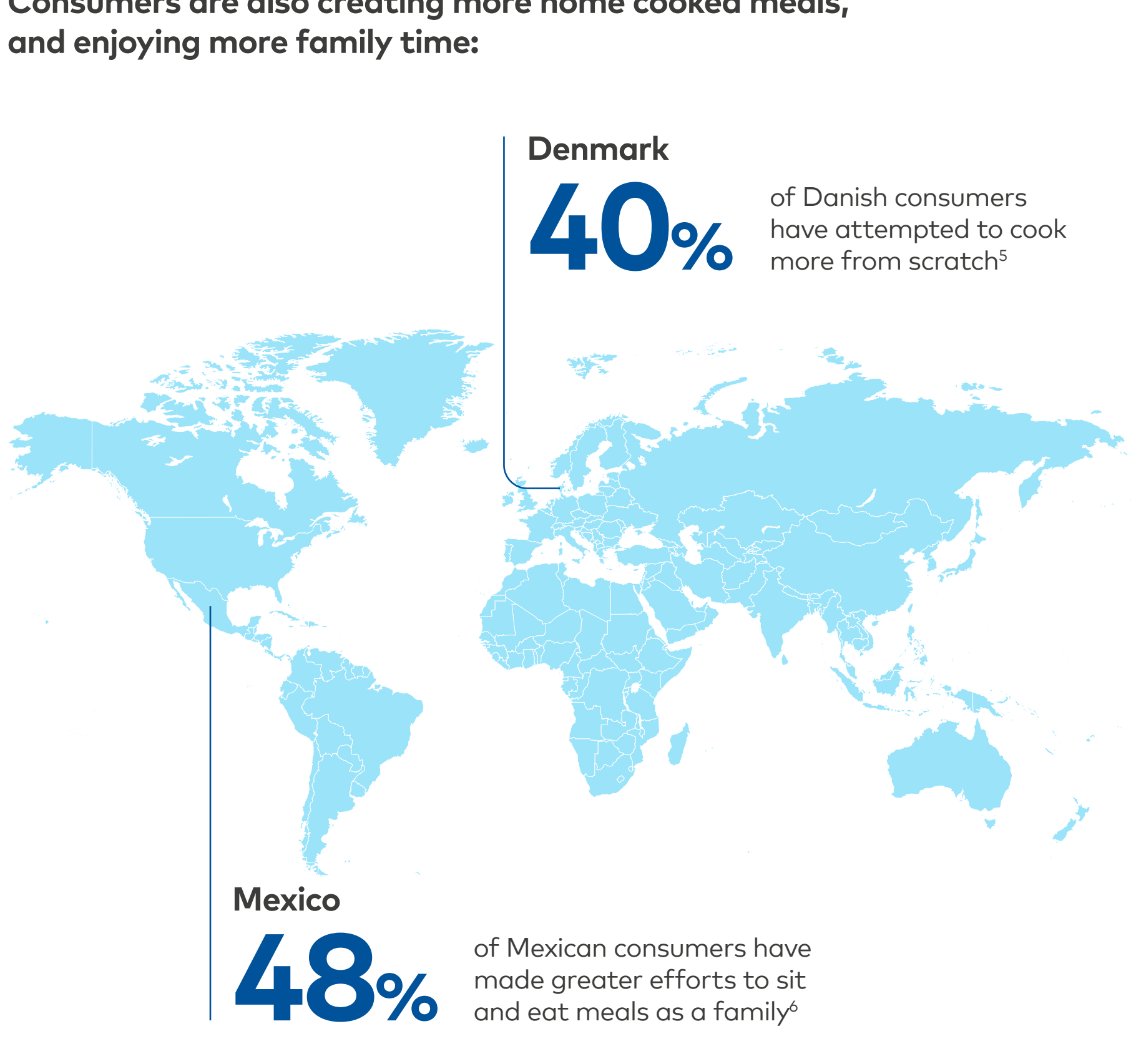


+291% YoY increase in popularity of at-home breakfast meal-kits in the US⁵

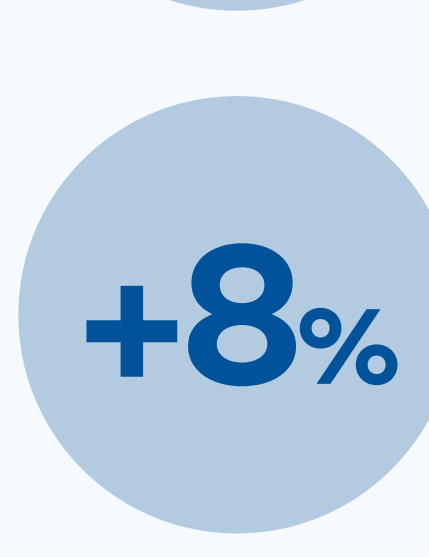


+94% increase in the share of UK breakfast cereal product launches featuring functional immune system claims¹⁰

Consumers are also creating more home cooked meals, and enjoying more family time:

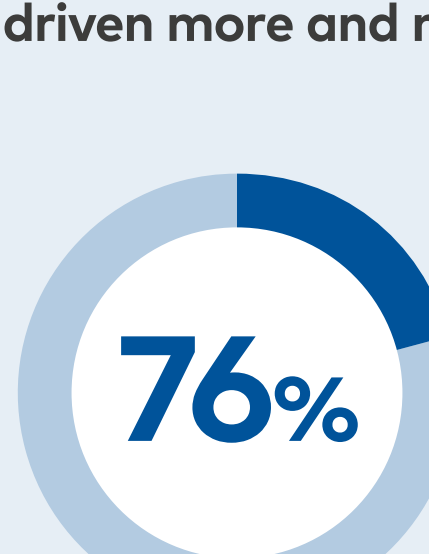


26% of global consumers have bought more premium ready meals to compensate for reduced spending in restaurants and takeaways¹¹

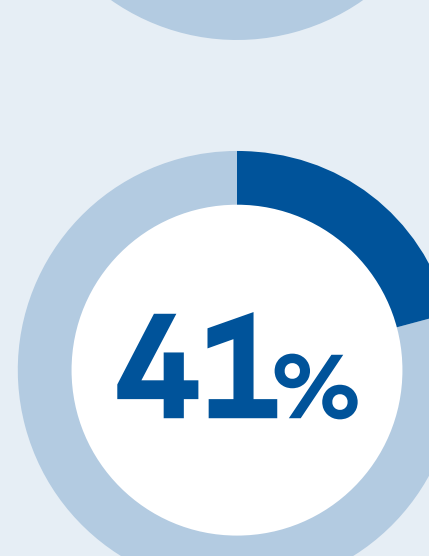


+8% increase in consumers who have made greater attempts to eat together as a family as a result of COVID-19¹²

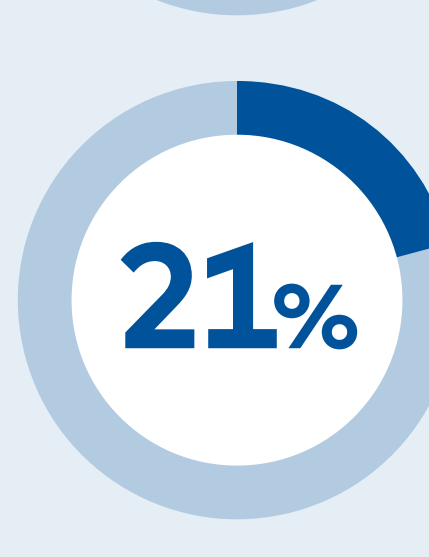
COVID-19 has also driven more and new snacking opportunities:



76% of Brazilian consumers have purchased more indulgent treats due to COVID-19⁸



41% of South African consumers have snacked more due to COVID-19⁷



21% increase in global snack bar launches with immunity claims between 2015/16 and 2019/20¹³

Opportunities

COVID-19 has resulted in many changes to our daily activities. Unprecedented global lockdowns, social distancing and the desire to save money has forced consumers to alter their consumption behaviours and create new ones.

Our research is showing that consumers are working, living and eating at home in greater numbers. This has resulted in a rediscovery of family consumption occasions. For example, people are taking the time to eat traditional breakfasts in the morning and eat home-cooked meals with their families for lunch and dinner. This is a departure from the growing 'on-the-go' trend, where people sought to eat on the move or substitute their meals with snacks. With less people going out to eat at restaurants and cafes, food and beverage manufacturers are presented with opportunities to leverage these growing "in-home" consumption occasions. For example, meal-kits that are delivered direct to consumers' homes are growing in popularity because they allow easy entry to home-cooking, and the making of more indulgent 'treat' meals at home.

The global snacking boom has also adjusted as COVID-19 keeps people at home. Consumers are looking for a way to treat themselves during these stressful, anxiety inducing times. Food and beverage manufacturers can look to produce snacks that give consumers that indulgent break during a day of being stuck inside.



Sources:

1. Accenture Covid-19 CGS Pulse Survey June 2020
2. Kantar Worldpanel
3. Mintel - How COVID-19 disrupted food and drink priorities - Lightsteep/Mintel
4. KuRunData/Mintel China Sep 2020
5. FMCG Gurus Denmark COVID-19 July Survey
6. FMCG Gurus Mexico COVID-19 July Survey
7. FMCG Gurus South Africa COVID-19 July Survey
8. FMCG Gurus Brazil COVID-19 July Survey
9. Tastewise & The Dairy Alliance | The Breakfast Report June 2020
10. Mintel GNPD - Breakfast Cereals Impact of COVID-19 UK
11. FMCG GURUS: How has COVID-19 Changed Consumer Behaviour (July)
12. FMCG Gurus Top Trend 7: Snacking Reclassified Explored June 2020
13. Mintel GNP

Keen to learn more about at-home consumption opportunities involving dairy?

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