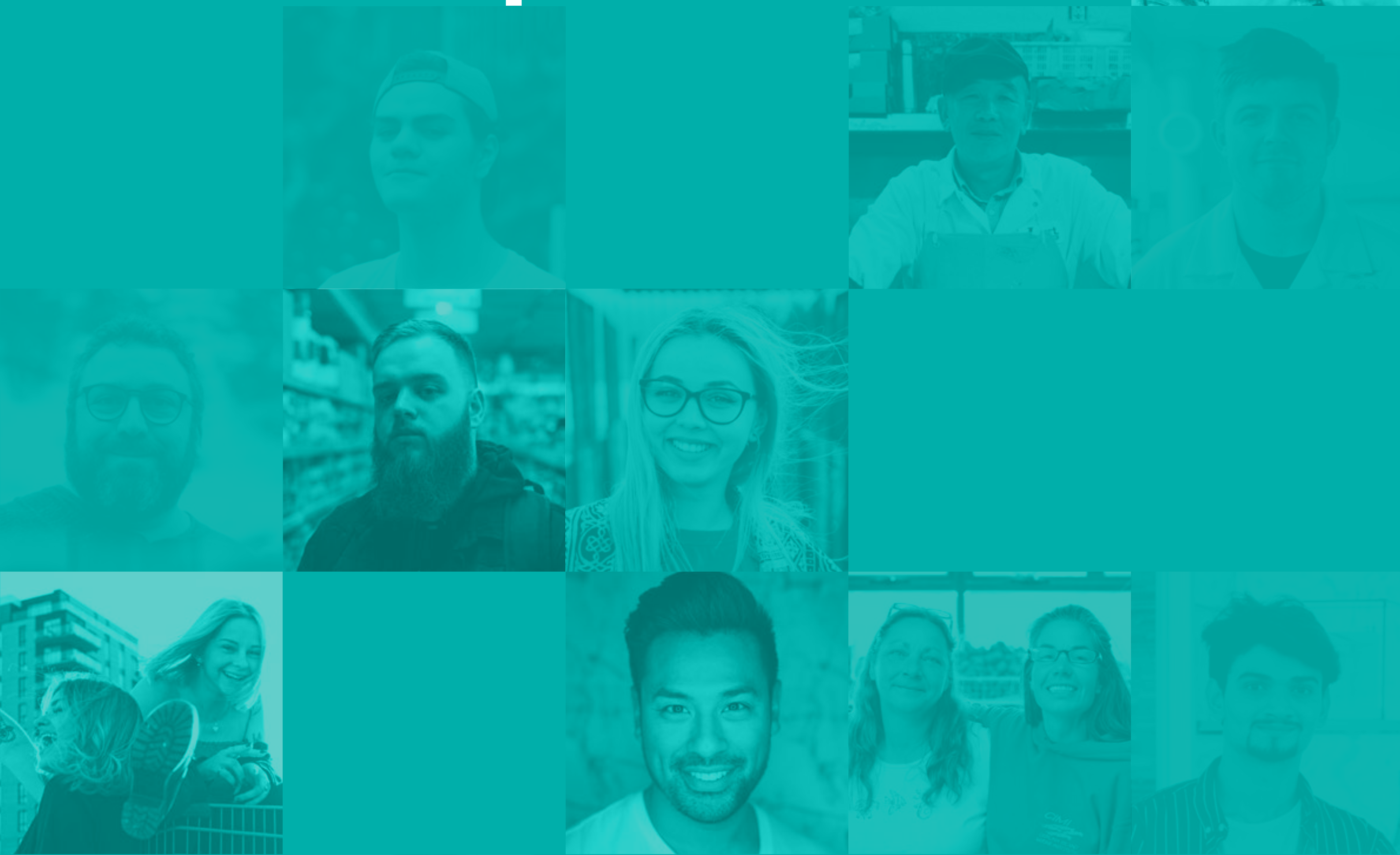
COVID-19 STUDY: EUROPEAN FOOD BEHAVIOURS

COVID-19 impact on consumer food behaviours in Europe



EIT Food

This activity has received funding from EIT Food, the innovation community on Food of the European Institute of Innovation and Technology (EIT), a body of the EU, under the Horizon 2020, the EU Framework Programme for Research and Innovation

Foreword

Saskia Nuijten
Director of Communication and Public Engagement at EIT Food

At EIT Food we work collaboratively to transform the food system to be fit for the future – helping solve the biggest innovation challenges through trusted industry, education and research partners working with informed and engaged citizens.

This year has brought disruption on an unprecedented scale to all aspects of our world – how we live, work, shop and eat – and created new challenges for every part of the agrifood value chain.

To better understand the ways in which people's food-related behaviours have altered as a result of COVID-19, and what future challenges and opportunities this might create for the food system, a consortium of leading universities in Europe from the EIT Food partnership, led by Aarhus University, Denmark, surveyed 5,000 consumers across ten European countries.

Not surprisingly, the survey found behaviours around food shopping, cooking and consumption to have been widely affected across the board, but it also revealed significant shifts in people's intentions post-pandemic. This includes an increased appetite for more varied cooking and dining experiences at home and rising demand for healthy food and local and sustainable options. These trends are framed by the challenging economic picture across Europe, making easy access to food at affordable prices the lead priority for our respondents going forward.

It is vital for the food system and policy makers to use this window of opportunity to innovate accessible and affordable solutions that enable these emergent health and sustainability behaviours for all and create lasting change. EIT Food will help drive this work forward through our funding, network and programmes, ensuring that Europe's citizens – making more active and considered food choices than before - are at the heart of the process.

How we work together as a sector to respond to this fast evolving new normal will be critical to deliver a healthy and sustainable food system that can meet the needs of individuals, businesses and society. Agility and being able to respond to fast changing market conditions have always been a key predictor of success, but this is even truer now and we have a real chance to make more radical progress .

"The survey found behaviours around food shopping, cooking and consumption to have been widely affected across the board."

Executive summary

The COVID-19 pandemic has touched the life of every European citizen and brought many new challenges - as well as opening up new opportunities.

Lockdowns, shielding, and working from home restrictions, along with diminished incomes and extra time on people's hands, have led to broad changes in consumer attitutudes and behaviour. Across Europe, we are witnessing significant shifts in food shopping habits, the products that we are buying and consuming, and the way we cook and eat. Our survey – conducted in September 2020 with 5000 consumers in ten European countries - shows interesting differences between countries and age groups, but these overall trends hold true:

Shopping differently and consuming more than before

since COVID-19 people report significant rises in shopping online and bulk buying, as well as net increases in consumption across almost every food category (especially fruit, vegetables, and flour).

Increase in planning and paying attention to what we buy

in general consumers say they have been more concerned with local provenance, packaging (tensions between hygiene and the environment here), freshness, avoiding additives, and searching for value.

Enjoying cooking and a rise in household mealtimes

across the board people report an increase in enjoying cooking and experimenting with recipes, a reduction in using ready meals and a shift towards proper meal times and eating with other household members.

On the whole these trends are most pronounced in the southern European countries – likely influenced by country variations in COVID-19 impacts and responses, combined with longer term cultural and socio-economic differences. Age-wise we observe greater behaviour changes in both directions in the youngest 18-35 year old group – whose lifestyles were typically altered more dramatically by the pandemic - and least in the oldest 55+ group.

Whilst we may see some behaviours reversing post-pandemic, consumers in our survey said that many of the changes will be lasting. Notable upward trends for the future include:

- Enjoying food and having a wide variety will matter more post-pandemic.
- Cooking skills and equipment and having time to cook will be more important.
- Accessible food stores and access to food at affordable prices are increased priorities.
- Nutritional knowledge, healthy foods and using food to control weight will matter more.
- People plan to buy more local food and reduce unsustainable packaging and food waste.

We must also be aware that a smaller number of those asked say that their intentions have gone in the opposite direction and in many cases people's intentions remain unchanged. Most pronounced overall is an increased focus on food affordability and value and with this comes the risk of widening inequalities and behaviour gaps around healthy and sustainable eating. The response from policy makers and the food system will be critical to consolidate and extend attainable behaviour changes that deliver a positive impact for individuals and society.

Pandemic impacts on consumer food behaviour

People are changing the way they shop

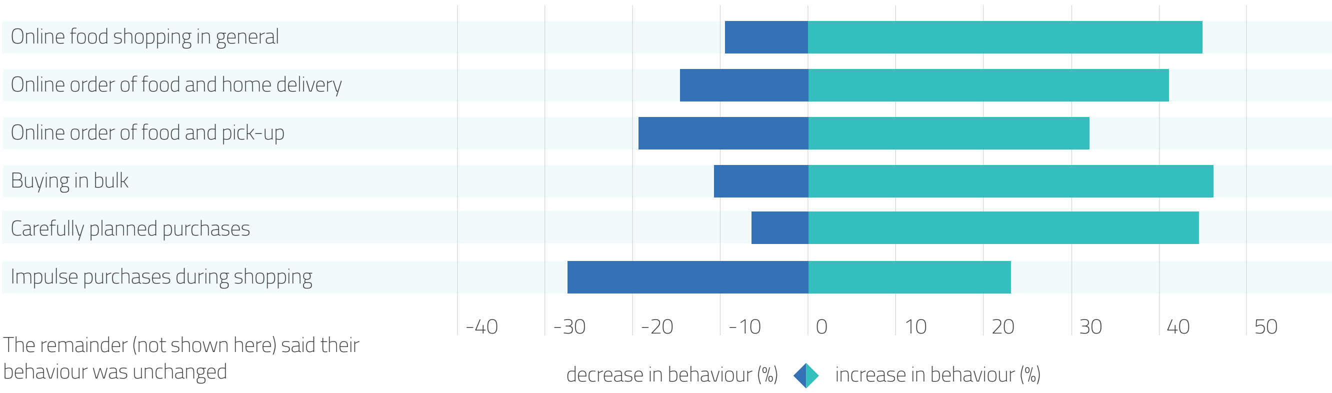
Since the COVID-19 pandemic – and the associated restrictions and anxieties around food shopping - there has been an accelerated shift to online shopping across all countries and significantly more bulk buying. Key findings:

- Big increase in food shopping online - overall 45% doing more versus 10% less (with Greece the most increased at 60% vs 7%). This trend is most pronounced in the 18-35 age group with 41% reporting an increase vs 33% of 36-55s and 24% of the 55+ group.
- Home delivery accounted for the majority, with an overall increase of 41% doing more (vs 15% doing less) compared to 32% doing more click and collect (vs 20% less).
- All countries saw a large increase in bulk purchases – overall 47% increased this behaviour vs 11% that reduced it (Finland reported the biggest swing at 52% vs 5%).

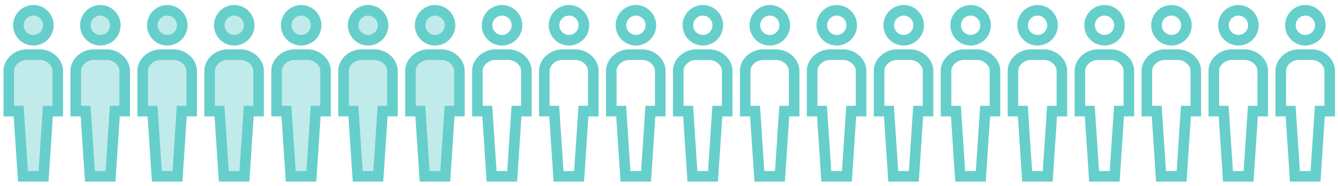
Alongside the switch to online we also saw more planned food shops and significant shifts in impulse buying behaviour.

- 45% of consumers said they were planning purchases more carefully vs just 7% less (in Spain this rose to 53% vs 4%).
- Overall more than half of people surveyed changed their behaviour around unplanned shopping and these changes were quite polarised, with 28% reporting less impulse purchases (as high as 40% in Greece) and 23% reporting more (as high as 39% in Romania).

Changes in food shopping behaviours during the COVID-19 pandemic (Total all countries)

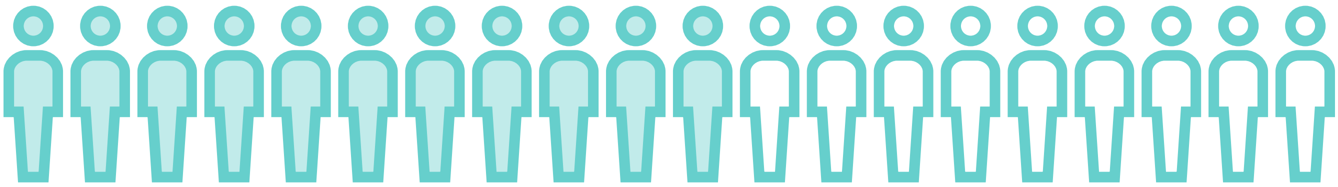


The remainder (not shown here) said their behaviour was unchanged



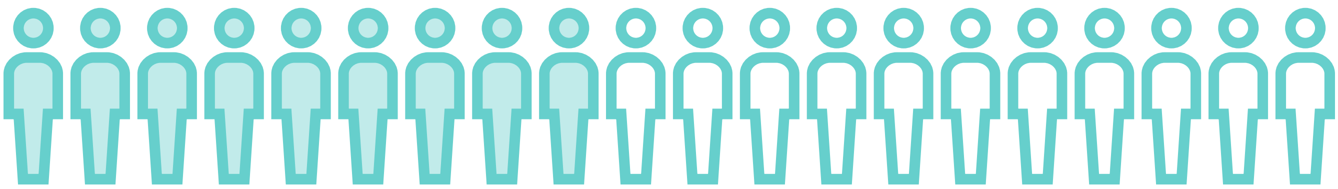
34%

have **lost** part or all their **income** since the pandemic started



55%

say they find it **difficult** to **make money last** until the end of the month



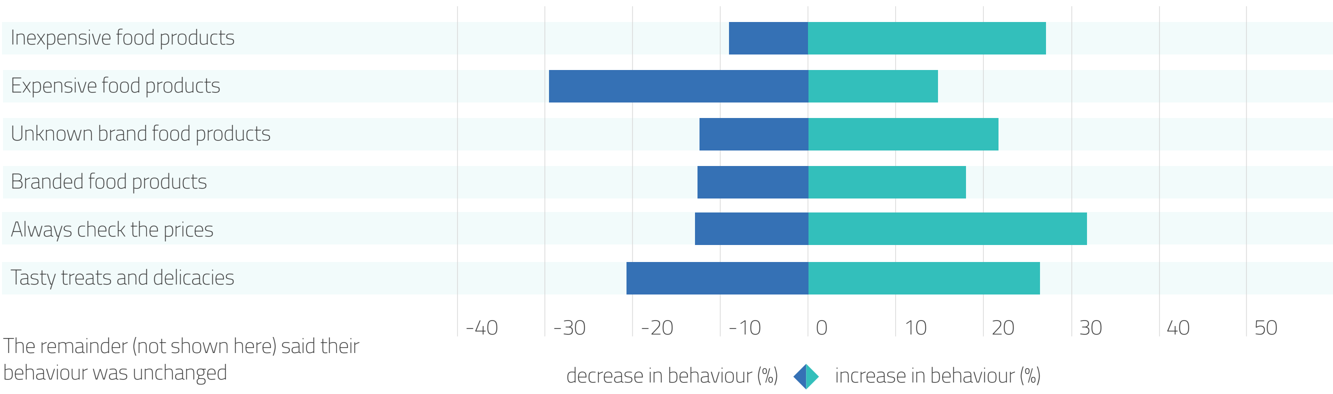
47%

struggle to have **enough money** to go shopping **for food**

Shoppers across Europe have been impacted financially by the COVID-19 pandemic with a third (34%) of those we asked losing part or all their income and more than half reporting difficulties making money last to the end of the month. No surprise then that our survey shows more shoppers always checking prices and a shift to less expensive foods/brands. Key findings:

- All countries showed a marked trend towards purchasing inexpensive foods - overall 27% buying more vs 9% doing the opposite (most pronounced in Spain at 35% vs 4%).
- Aligned with this there was a decline everywhere in the numbers buying expensive food products – overall 30% compared to 15% increasing these purchases. (Spain, Poland & Greece showing the biggest drop in expensive purchases and France the biggest rise).
- Consumers reported buying more unknown brands - overall 22% more vs 12% less, with a net increase everywhere but Romania (the UK showing the greatest shift at 30% vs 7%).
- At the same time there was also an overall increase in the numbers buying branded goods – but the split was tighter here with 18% buying more versus 13% less.
- Almost a third (32%) of consumers overall said they now always check the prices even on cheaper food products vs 13% checking prices less (Greece highest at 39% vs 12%).
- However many people are still treating themselves to tasty treats and delicacies - 26% overall doing this more, while 21% are doing it less. (34% more and 11% less in the UK).

During the COVID-19 pandemic, how did your consumption change? (Total all countries)

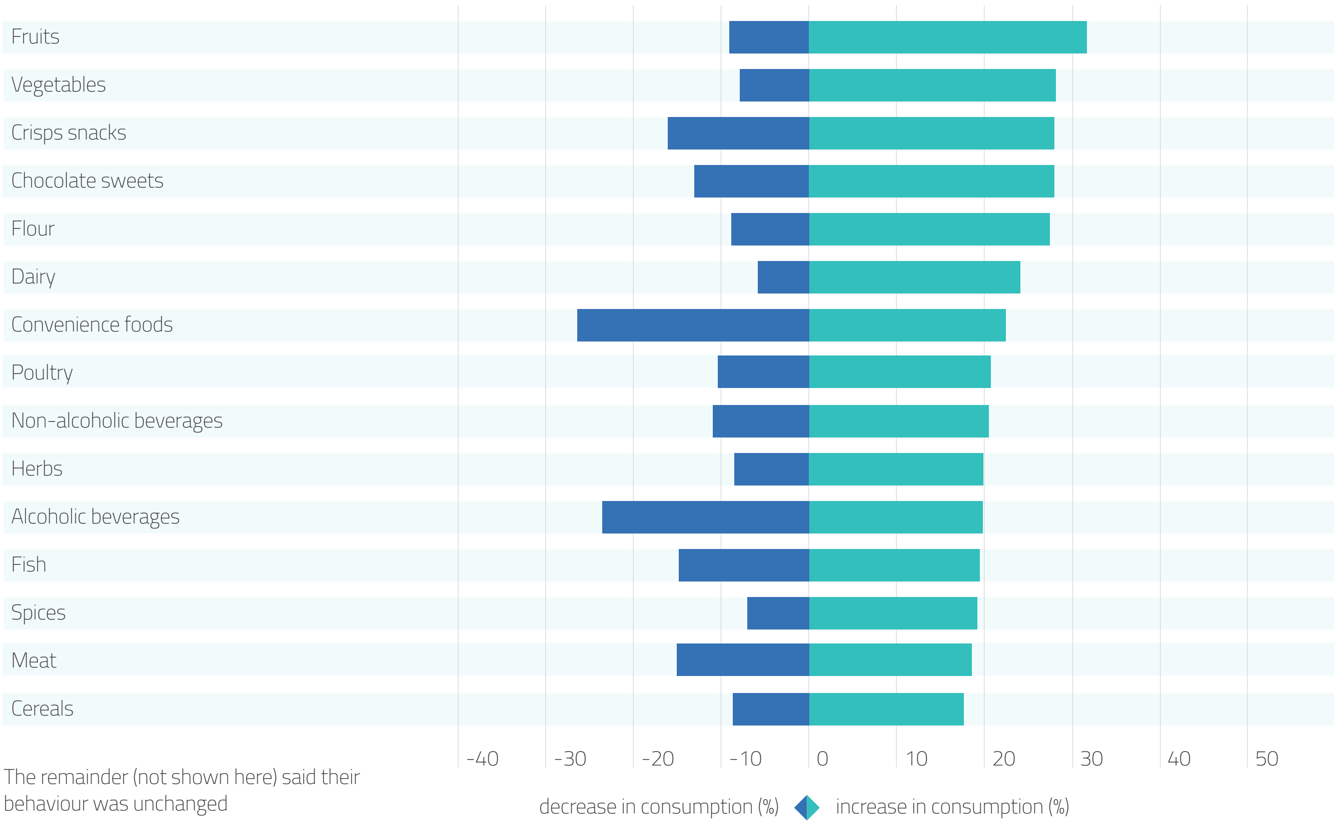


The remainder (not shown here) said their behaviour was unchanged

Increase in consumption of food products

On balance we see consumers reporting consuming more in almost every category, as COVID-19 lockdowns and a rise in homeworking across Europe led to people spending more time at home and impacted eating behaviours and food choices.

Consumers reporting changes in product consumption during COVID-19 pandemic



The remainder (not shown here) said their behaviour was unchanged

- The categories showing the largest rises were fruit (32% increased consumption vs 9% that decreased) and vegetables & legumes (27% increased vs 8% decreased).
- Next was flour - all countries reported a rise in consumption with 27% overall saying they consumed more flour (vs 9% less). In Italy almost half (49%) used more flour (vs 7% less).
- Meanwhile 24% overall said they consumed more dairy products (vs 6% less), and in Spain a third (33%) used more dairy products (vs just 3% less).
- Herbs & spice use increased across the board but not as much as chocolate & sweets (28% more vs 13% less) and crisps & snacks (28% more vs 16% less).
- All countries reported an increase in consumption of poultry (overall 21% more vs 10% less), whilst fish was more mixed (19% more vs 15% less) and meat consumption rose a small amount everywhere but France and Germany (overall total 19% more vs 15% less).
- Alcohol was one of only two categories to show a general decline in consumption. In total 24% reported consuming less alcohol compared to 20% consuming more – but this trend was reversed in the UK, Finland and Sweden, and overall in the 18-35 age group.
- The other category showing an overall drop in consumption was Convenience Foods (26% reported less use vs 22% more) but behaviour was quite polarised – in Greece 46% used less (vs 21% more) but consumption rose in the UK, Finland, Germany & Romania.

18–35

age group were **most likely** to **change behaviour**

55+

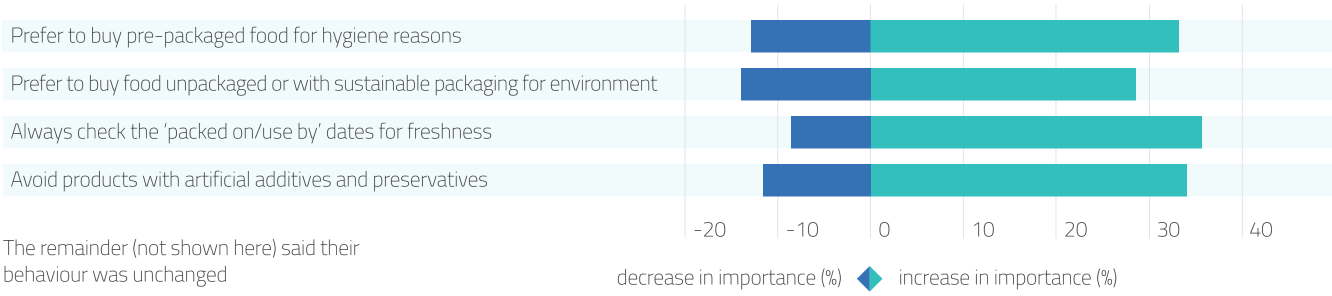
age group were **least likely** to **change behaviour**

Paying more attention to packaging

Across the board, since the COVID-19 pandemic, people have been paying more attention to how their food is packaged and to the information on the packaging – concerned with hygiene, freshness, additives and sustainability. Key findings:

- Overall people in every country report an increased preference for pre-packaged goods due to hygiene concerns: total 33% more vs 14% less. (Romania most at 49% vs 11%).
- At the same time we see a smaller rise in people seeking more sustainable unpackaged food products or biodegradable/recyclable packagingment: 29% more vs 15% less.
- There is an increasing trend across the board for consumers to always check the 'packed on/use by' dates for freshness: 36% more vs 9% less (Spain 46% vs 5%).
- And everywhere consumers are doing more to try to avoid products with artificial additives and preservatives: total 34% more vs 12% less (Romania 47% vs 14%).

Change in packaging related shopping behaviours during the COVID-19 pandemic (Total all countries)



The remainder (not shown here) said their behaviour was unchanged

69% have felt they had **more time** than usual

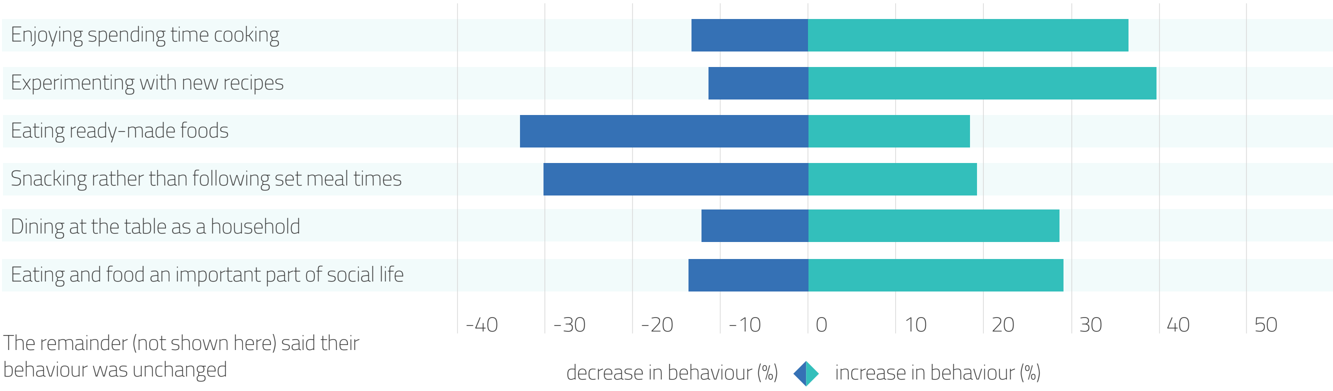
37% have been **working from home** since the pandemic started

Changing cooking and meal time behaviours

With people spending increased time at home in all countries we see a significant rise in people enjoying and experimenting with home cooking as well as more regular household meals. Key findings:

- In all countries people reported an increase in enjoying spending time cooking - overall 36% did vs 13% reporting a decrease. In the 18-35 year old age group 43% reported an increase although 17% said the opposite (36-55 year olds 39% vs 12%; 55+ 29% vs 12%).
- An even higher number of people reported experimenting more with new recipes (overall 39% experimented more versus 11% less). These upwards trends were most pronounced in Spain, Italy and Greece and least in Sweden and Germany.
- This rise in home cooking corresponded with a general reduction in eating ready-made foods – this was true everywhere but Spain and overall 33% used less vs 19% more.
- Consumers also reported a shift away from snacking rather than following set meal times (true everywhere but the UK) – overall 30% doing this less vs 19% doing it more, but 18-35s trended the other way: 30% increased snacking over set meals (vs 25% less).
- Dining together at the table as a household increased across the board – in total 29% reported doing this more compared with 12% less (highest in Spain at 44% vs 7%).
- On balance consumers in every country felt that eating and food became a more important part of their social life (overall 29% agreed, while 17% felt the opposite).

Changes in cooking and meal time behaviours during the COVID-19 pandemic (Total all countries)



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Country-by-country comparisons

Finland

People in Finland show less behaviour change generally, with half saying they have struggled financially during the pandemic and 61% having more time. They report no overall change in dining as a household, and smaller increases in cooking and product consumption than most of Europe - although they do report the biggest net rise in convenience foods and a small net increase in alcohol. Meanwhile 52% have increased bulk buying (vs 5% less) and online shopping is up significantly, equally split between delivery and pick up. We also see a rise in buying packaged goods for hygiene reasons and a drop in seeking sustainable packaging.

France

Just over half (52%) of French consumers report financial struggles during the COVID-19 pandemic and 68% say they have had more time. Overall consumers here show slightly below average increases in online shopping, planned purchases and bulk buying, but the biggest rise in buy direct from producers and suppliers (38% more vs 15% less). They are also more likely than most to compare food labels and less likely to shift to inexpensive products or select packaged products for hygiene reasons. They show smaller rises in crisps and chocolate and 36% have spent more time cooking, with a net reduction in meat consumption (19% eating less vs 16% more).

Germany

In Germany less people report struggling financially or having time on their hands than in other parts of Europe and we also see smaller changes in food related behaviours during the pandemic. There is still a significant shift towards online shopping and more so to careful planning and bulk buys as well as a moderate trend towards inexpensive products and unknown brands. Overall consumers report modest increases in consumption in most categories but Germany is the only place other than France to show an overall reduction in meat consumption, with 17% eating less vs 10% more. A quarter of Germans say they have cooked more and 30% used less ready meals.

Greece

People in Greece report the greatest financial difficulty during the pandemic (69% having struggled) and more than three quarters (76%) had more time. Here we see the largest rise in online shopping (60% doing more vs 7% less), bulk buying and always checking prices, as well as a notable shift to less expensive foods. Greek consumers report significant increases in production consumption, especially fruit, vegetables and herbs, but also the highest rise in meat consumption and second highest for chocolate & crisps. Greece reported the greatest drop in alcohol use. There was a big rise in cooking, trying out recipes and dining together.

Italy

Italy had a long lockdown and 63% of consumers report struggling financially during the pandemic, with 80% having more time than usual. Overall we see big behaviour shifts, including some of the largest rises in online shopping, planning and bulk buying, as well as checking prices and use by dates and avoiding additives. Italian consumers report the second largest rise in vegetable consumption and the largest in flour (49% using more), plus a strong decrease in buying expensive foods but also the biggest increase in buying brands. Italy is in the top three for more time cooking and dining together, with over half trying new recipes and the biggest drop in ready meals.

Spain

Generally we see consumers in Spain reporting the largest behaviour change during the pandemic, not surprising given that they scored highest for having more time than usual (81%) and were in the top four countries for financial struggles since COVID-19. Spain reported the largest rise in planned food shops and home delivery as well as comparing product labels and checking for freshness – plus the biggest increase in consumption across almost all categories. Over half of Spanish consumers said they had enjoyed more time cooking and experiementing with new recipes – the most anywhere- and they also reported the biggest rise in meals together as a household.

Poland

In Poland 53% of those asked report having financial struggles during the pandemic and 66% have had more time on their hands. Online shopping has risen less than the average but still significantly and bulk buying is most increased here. Poland is in the top three for reported increases in planned purchases and consumption of fruit, dairy and herbs & spices. Consumers here show one of the largest decreases in buying expensive foods and are the only ones to show an overall drop in buying brands. Home cooking and dining together have risen in line with the European average and Poland shows the second largest decrease in ready meals (41% less vs 15% more).

Sweden

Swedish consumers report the least behaviour change overall – likely in part a consequence of a lighter lockdown approach than other countries in Europe and fewer reporting financial struggles during the pandemic than anywhere asked apart from Germany. Still we see a significant increase reported in planning food purchases, shopping online and bulk buying. There were small net increases in eating meals as a household and experiementing with news recipes and a decrease in ready to eat foods and buying brands. Also below average rises in product consumption, with dairy relatively high, and 30% using less convenience foods (vs 17% more).

Romania

Financial struggles affected 56% of Romanian consumers during the pandemic and 73% reported having extra time. Here we see big increases in product consumption, especially vegetables, dairy, meat and poultry, while 33% decreased alcohol use. There was a significant rise in online shopping, planned purchases and bulk buying, but also the largest increase in impulse buys (39% doing more vs 21% less). Shoppers here were second most likely to always check prices, yet Romania was the only place to show a net decrease in buying unknown brands (while buying more brands) and 49% say they are choosing more packaged goods for hygiene reasons.

UK

In the UK just over half say they have struggled financially during the pandemic – slightly better than most countries – and 67% reported having more time. In terms of food shopping we see the second largest rise in online shopping here (54%) but also the biggest decrease (14%) and notable shifts towards planned shops, bulk buys and unknown brands. UK consumers follow the general trend in increased product consumption across most categories including fruit and vegetables but they report the largest rise in cereals, convenience foods, alcohol and tasty treats. They are cooking more than average but also show the biggest rise in snacks over set meal times.

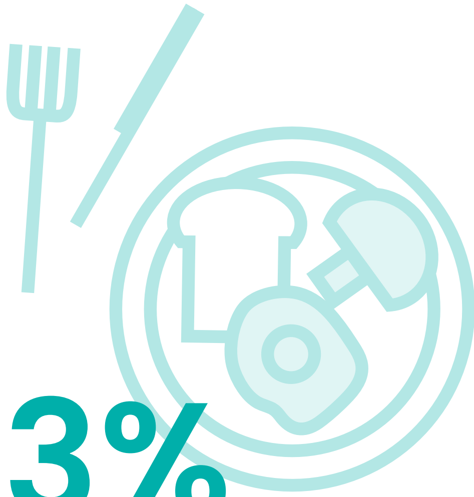
Lasting change

Clearly there have been widespread changes to people's food shopping, cooking and eating behaviours across Europe during COVID-19 and we wanted to understand which changes might persist post-pandemic so we asked people how their future intentions had altered.

Food has more significance

We found that food generally will have a greater significance for people – likely in part a result of the more central role it took in their lives during lockdown and the resurgence of home cooking and household meal times. Key findings:

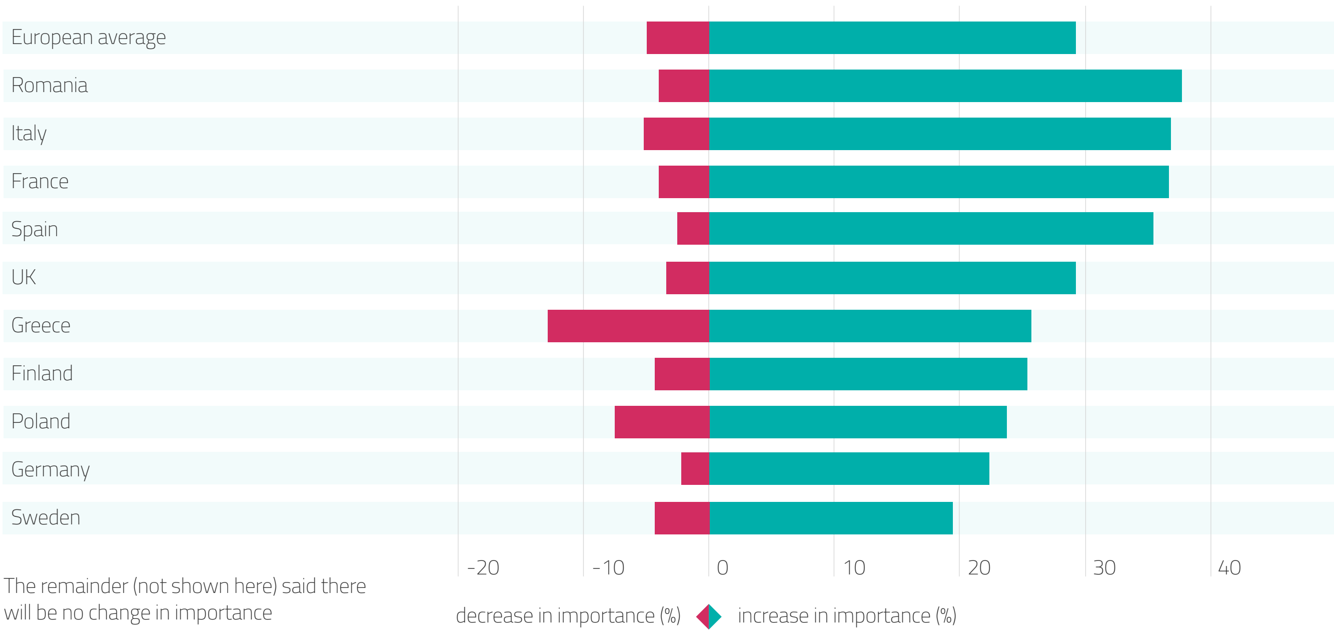
- 23% of consumers overall say that it will be more important post-pandemic to choose food they enjoy eating (vs 3% that say it will be less important). This trend is most pronounced in Romania (30% vs 2%), France (29% vs 4%), and Italy (27% vs 5%).
- 30% say it will matter more post-pandemic to eat a varied menu & wide range of food vs 5% less. (Romania 37% vs 4%; France 36% vs 4%; Italy 36% vs 5%; Spain 35% vs 3%).



23%

say it will be **more important** to choose food they **enjoy eating** post-pandemic

Post-pandemic, how important will eating a varied menu be to you?



The remainder (not shown here) said there will be no change in importance

Cooking will matter more

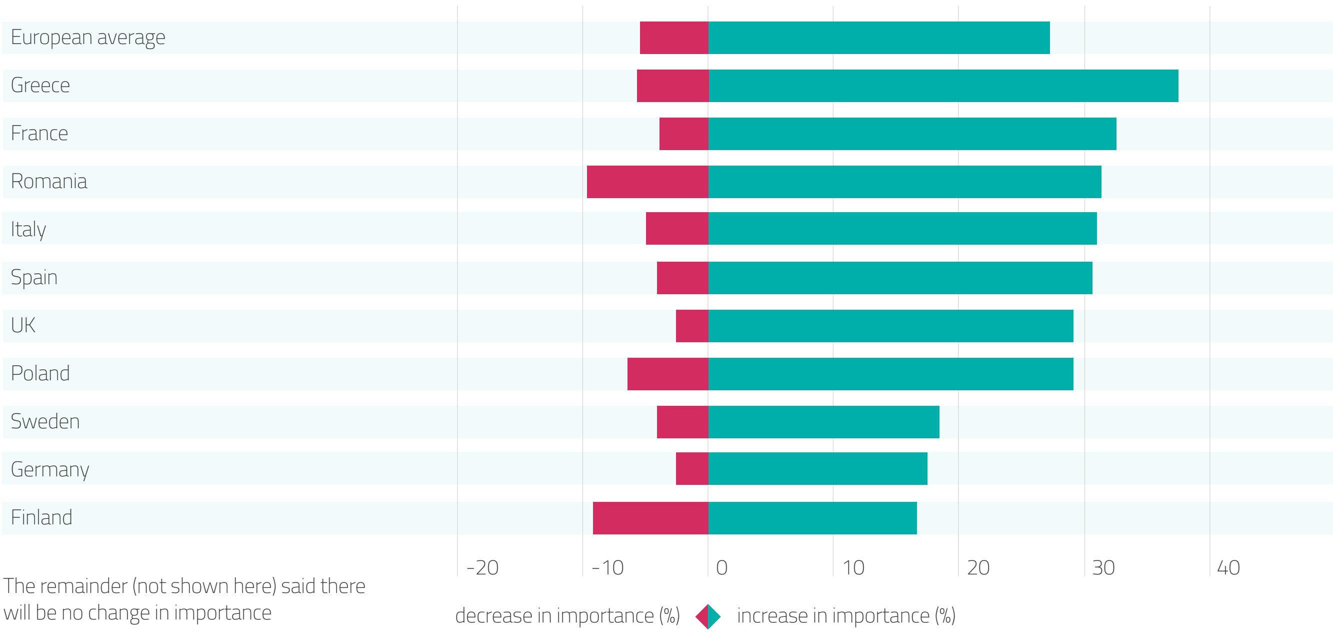
24%

say that having **good cooking skills** will **matter more**

On balance people say cooking will also matter more to them after the pandemic is over. Key findings:

- 27% say having time to cook meals will be more important post-pandemic, vs 5% less. (Greece 37% vs 6%; France 32% vs 4%, Spain 31% vs 4%, Italy 31% vs 5%).
- 24% say that having good cooking skills will matter more post-pandemic, vs 6% less (highest in Greece 31% vs 10% and Spain 29% vs 4%).
- 22% say having the right equipment to make cooking easier will be more important, vs 6% less (Highest in Romania 32% vs 4% and Greece 32% vs 8%).
- 21% say it will matter more to have products that are quick and easy to prepare but 10% say it will matter less (In Greece 29% more vs 11% less but in Finland 14% vs 11%).

Post-pandemic, how important will having time to cook meals be to you?



The remainder (not shown here) said there will be no change in importance

Cost and access to food will be more important

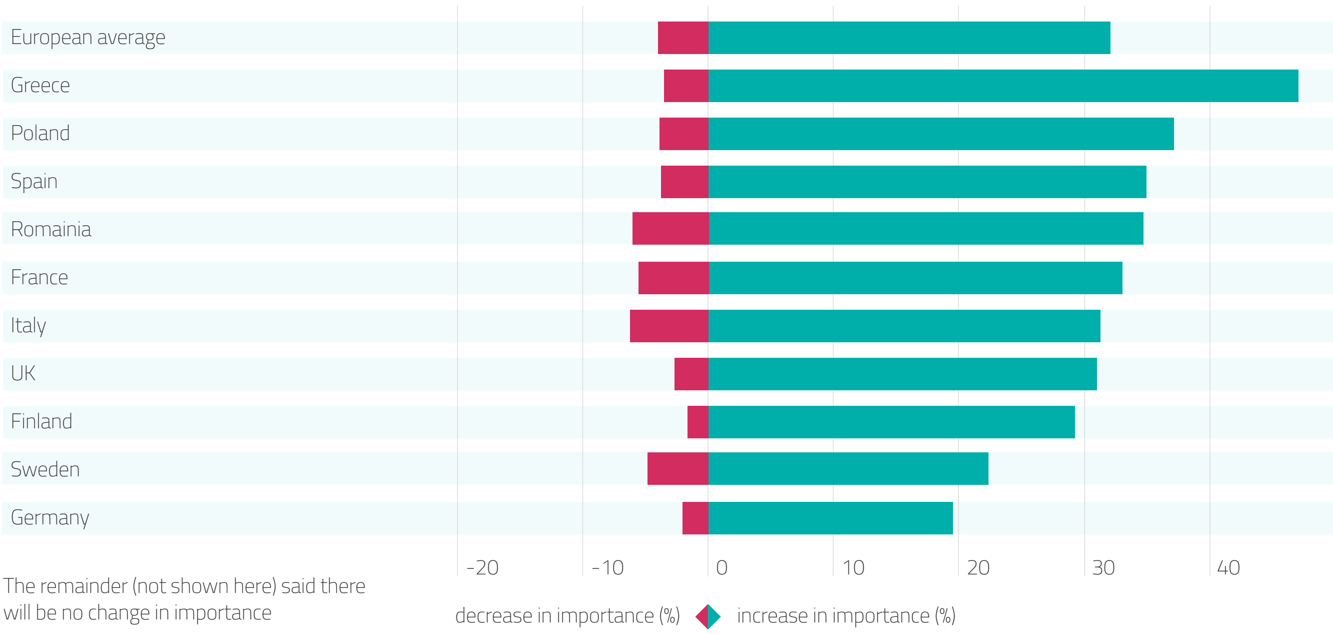
In general people say affordability and access to food will matter more post-pandemic:

- 28% of consumers overall say that going forward it will be more important to spend as little on food as possible vs 9% that disagree (Greece highest at 39% more vs 7% less).
- 32% say that access to food at low enough prices will be more important post-pandemic, vs 4% that say it will be less important (Greece again highest at 47% vs 3%).
- 30% of those asked say accessible food stores will matter more vs 3% saying less. (Highest in Spain 37% vs 2%; Greece 37% vs 5%; and Romania 36% vs 4%).
- 31% say help from friends & family will be more important after COVID-19, vs 5% that think it will matter less. (Greece highest at 49% more vs 5% less).

30%

say **accessible food** stores will **matter more**

Post-pandemic, how important will it be to you to access food at a reasonable (low enough) price?



The remainder (not shown here) said there will be no change in importance

Health and nutrition will be a priority

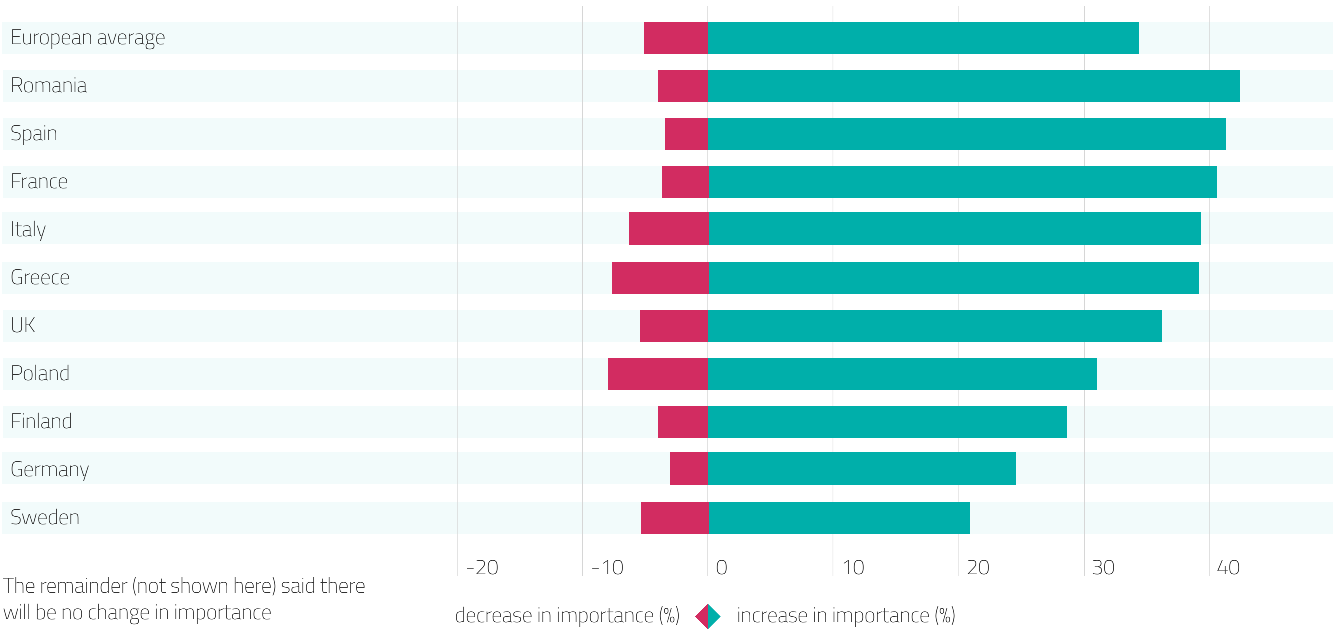
29%

say **avoiding** food **additives and preservatives** will continue to be **more important**

Overall, health and nutrition will also be more of a priority for Europeans after the pandemic:

- Almost half of consumers overall (49%) say being in good health will be more important vs 2% that say less (trend is strongest in Greece 68% vs 2% and Romania 58% vs 2%).
- A third of people (34%) say a healthy diet will matter more post-pandemic vs 5% less. (Most pronounced in Romania 43% vs 4%, Spain 41% vs 3% and France 41% vs 4%).
- Overall 29% say avoiding food additives and preservatives will continue to be more important post pandemic (vs 7% who say it will continue to be less important).
- Also 29% of people plan to focus more on controlling weight through food choices vs 7% doing this less (trend strongest in Greece 40% vs 8% and Romania 37% vs 7%).
- In total 24% say that a good knowledge of nutrition will be more important vs 4% that say it will matter less (Italy is highest here at 35% more vs 5% less).

Post-pandemic, how important will eating a healthy diet be to you?



The remainder (not shown here) said there will be no change in importance

Changes that could have a positive impact on sustainability

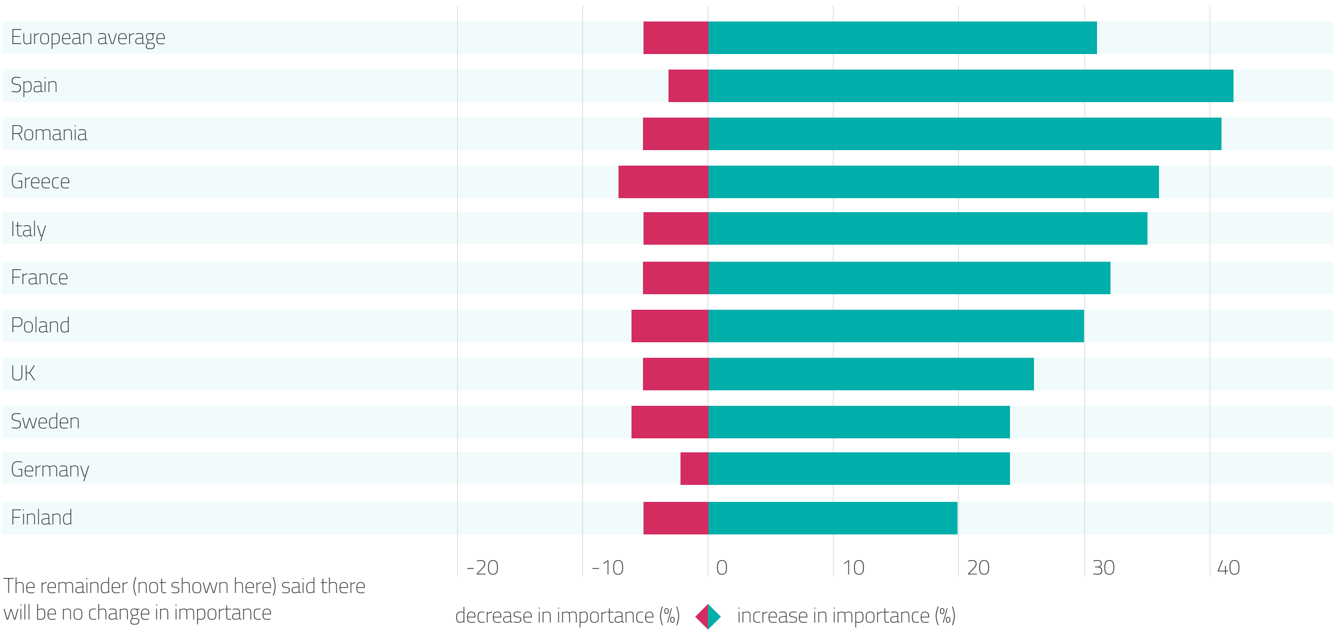
Consumers across Europe reported a number of behaviour changes going forward that could have a positive impact on sustainability:

- Of the 35% that said buying locally produced food was more important to them since the COVID-19 pandemic, 87% say this will very likely continue to be the case in the future.
- Of the 28% that said buying unpackaged products or those with biodegradable/ recyclable packaging had become more important, 82% said this is very likely to persist.
- Of the 44% that threw away less food, just 37% of these say they are very likely continue (plus 11% reported throwing away more food and 60% of those plan to persist with this).

87%

of those buying **locally-produced** food say this will continue to be **more important**

Did your preference for local food change and will it persist post-pandemic?



The remainder (not shown here) said there will be no change in importance

About the project

This project was coordinated by Aarhus University and carried out by the EIT Food Consumer Task Force, consisting of Aarhus University, IATA, Queens University Belfast, University of Helsinki, KU Leuven, University of Warsaw and VTT.

Methodology

Consumer data was collected by an online survey carried out through Aistila Oy (www.aistila.fi).

Data collection was conducted in 10 European countries (Spain, Sweden, Germany, UK, Poland, Italy, France, Greece, Finland, Romania).

The majority of the data was collected from 17th to 25th of September 2020 inclusive, with all data collection completed by 30th September 2020.

A total of 5,000 adult consumers (18+) were surveyed, meeting the criteria of being responsible or co-responsible for grocery shopping. Approximately 500 consumers were surveyed in each country; the total number of completed responses in each country varied between 543 and 580.

Quotas were established to ensure equal representation of gender (male/female) and age groups (18-40, 41-60, 61-100). The average response time was 28.5 minutes (median 22 minutes).

Consumers were recruited via the Cint platform (www.cint.com). The target was to reach 500 consumers in each country (N=5000 total). Cint is a service platform for consumer panels used in market research. In this study, consumers were sampled from many different panels.

The survey was programmed and data collected using Compusense Cloud (Compusense Inc. Guelph, Canada).

COVID-19 study partners

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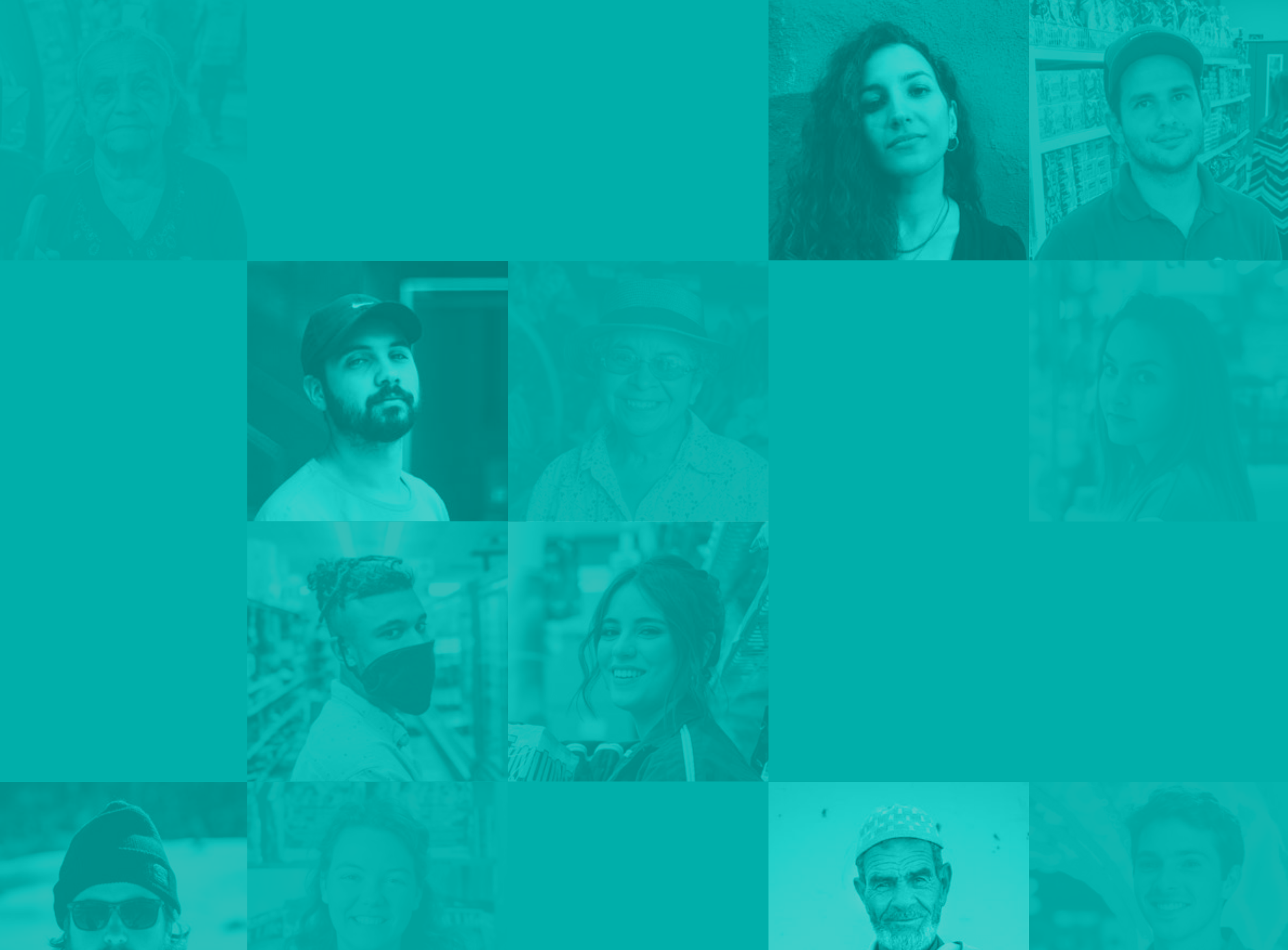

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