



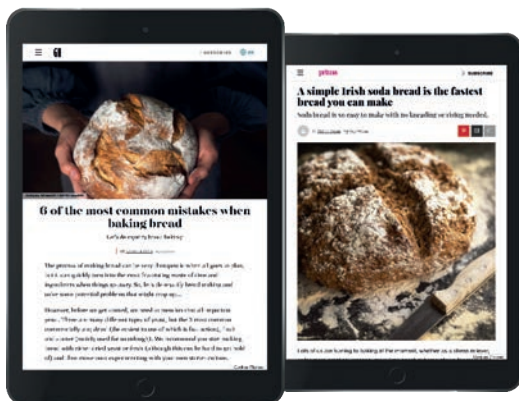
LOCKDOWN KITCHEN:
**COOKING AND EATING
DURING CORONAVIRUS**

APRIL 2020

SUMMARY

From the 20th to the 23rd March 2020, the British Government announced a series of measures that essentially put the United Kingdom into near-total lockdown. Restaurants, cinemas and pubs closed as did most retail outlets that were not considered vital. People were encouraged to “Stay at home, protect the NHS, save lives”.

This lockdown is unlike anything we have ever seen in Britain and is clearly restricting and reshaping consumer behaviour. While sectors like travel and fashion retail have essentially come to a halt, the food and beverage sector has been impacted in an altogether different way. When you consider that 27% of evening meals are eaten out of home according to Kantar and most of these establishments are now closed, consumers have been forced to eat differently. In addition, consumers are facing a recession that many believe will be more severe than even the Great Depression of the 1930s.



The lockdown led to 88% of households visiting a grocer between the 16th and 19th March, helping to drive significant out of stocks and record sales. While the key retailers saw massive online traffic growth in unique visitors according to Similarweb (Ocado.com +237%; Morrisons.com +250%) this did not translate into online sales. Restrictions in capacity to meet demand meant that online grocery commanded its lowest share of the grocery market for two years in March 2020. The real winners were convenience stores (+30%) and traditional bricks and mortar retail.

Against this backdrop and as the leading producer of food and drink editorial across 13 brands (Good Housekeeping, Delish, Women’s Health, Men’s Health, Country Living, Prima etc.) it was imperative to know what our consumers

were doing at home and how their cooking and eating habits were changing. The reality is that we are facing a culinary earthquake where those working from home, in particular, are operating in a new context. They have different needs as they are not rushing out the door in the morning to get to work and are eating lunch at home. They have potentially purchased new brands and products due to stock shortages. They are home so they can start a process in the morning and return to it throughout the day, like proving dough, baking a cake or slow-cooking a shoulder of lamb. Put simply, the entire cooking context has changed at a fundamental level.

To understand this new, emerging universe we did research with 4,213 consumers from the Hearst panel from 3-8 April. The profile of the respondents was weighted to match Hearst’s PAMCo profile and from an age and demographic profile. This means that the audience is more affluent, female and positive than a nationally representative sample. They are also more into food, cooking, new products and eating out according to TGI. We have also been able to segment them based on whether they are working from home or are still going out to work.

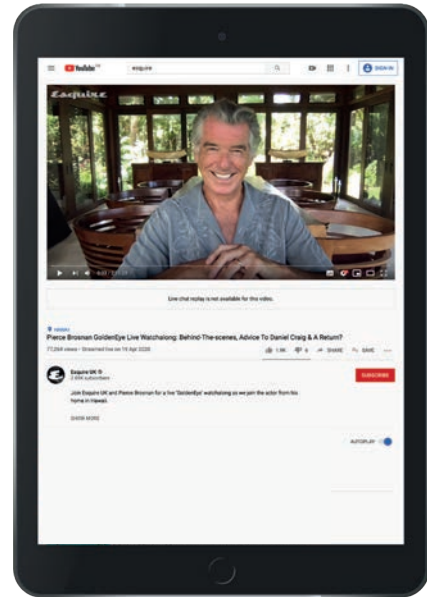
The picture that emerges is one of profound change that provides opportunities and risk for brands. Consumers are cooking more than ever and have embraced new dishes and new processes, like breadmaking. New skills have been learned and brands and products added to people’s repertoires. Brands can’t ignore these recent experiences as consumers are likely to keep using these skills, keep trying new recipes and discovering fresh content. We are also facing a recession where brand choice will come under renewed scrutiny as trade-offs between quality and value play out.

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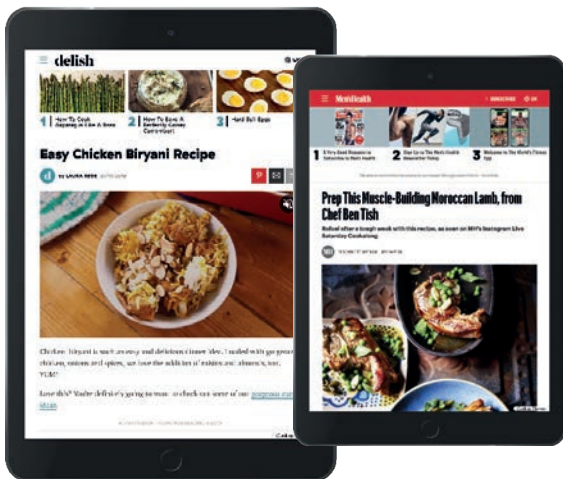
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A new eating context has emerged where people have returned to their tables and are eating as a family. The meals are slower and people seem to be enjoying the variety of the dishes they have been creating at home. However, people are concerned about their weight and, in all likelihood, their health. With more people choosing to work from home more often and a desire to avoid unnecessary travel, the eating at home market will grow as it has across Asia after the lockdown was lifted. This is likely to be amplified further as the government recently suggested that pubs and restaurants will be the last to leave lockdown. Brands will need to establish how to talk to consumers in these unsettled times and find ways to be relevant. The digital experiences we have had are now our ‘new normal’, (as it is being called), and there will be more ways than ever to reach and engage consumers en masse via digital communication.



A recent survey commissioned by YouGov with 4,343 British adults for the Food, Farming and Agricultural Commission suggested only 9% want things to revert to “normal” after the outbreak is over. More than half (54%) hope they will make some changes in their own lives and for the country as a whole to learn from the crisis. There is a great opportunity for brands to establish an even more positive role in consumers’ lives. There is an opportunity for us all to slow down, invest in things we care about and turn this crisis into a turning point. At Hearst we are focused on helping our community get more out of life in partnership with like-minded brands, so please get in touch if you want to help us create the new normal.



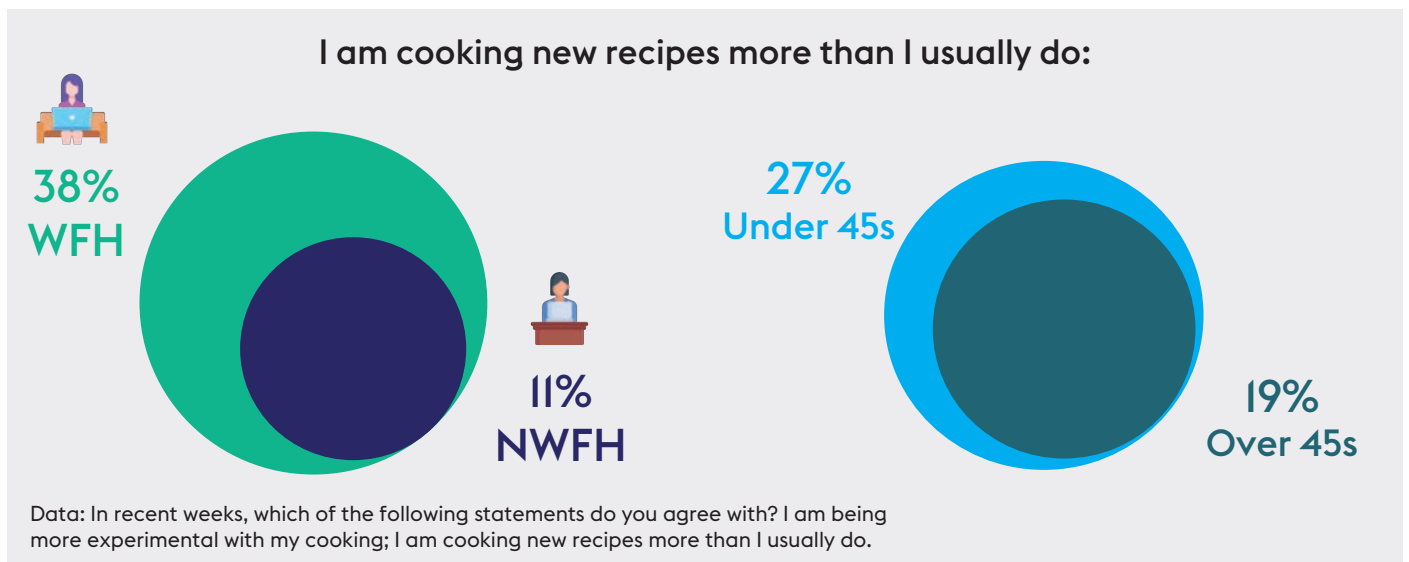
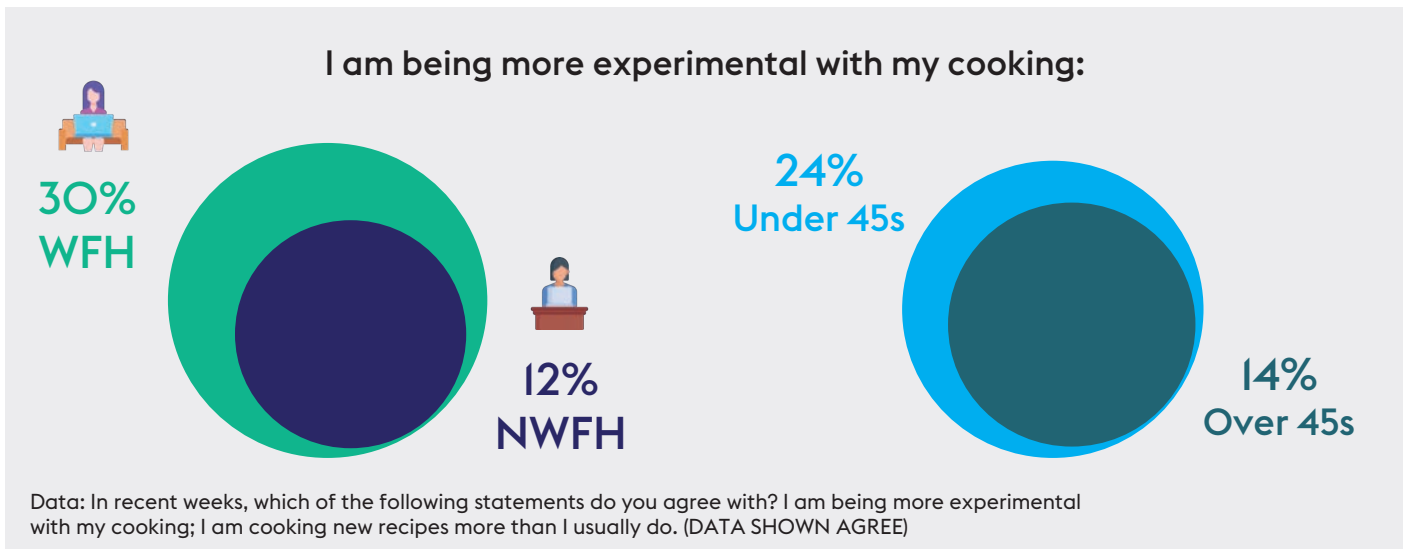
At Hearst, we exist to support our audiences to Get More Out of Life. We deeply understand the power of positivity and have taken a characteristically positive approach to this crisis, producing articles and content that help our community to get the most out of their shifting realities. We have staged virtual events designed to keep people healthy with Women’s Health and entertained people with pub quizzes and even a ‘watch along’ with Pierce Brosnan. We have shared more digital food content than ever and our magazines, a much-needed escape from technology, are more valued than ever. In fact, Kantar’s Coronavirus Barometer claims that many are reading magazines at record levels and there has been exponential growth in Hearst subscriptions over recent weeks.

Ollie Lloyd
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CULINARY EXPLORATION

Hearst’s audience over-indexes on a love of food and cooking, according to TGI, and we produce more food and drink printed editorial than any other publisher across 13 of our brands. Therefore, it is not surprising that amongst those working from home, there is a significant investment in culinary endeavours. They are using more new recipes than usual and are being more experimental. If we compare the community who are still working away from home these trends are far less pronounced. In fact, only 8% of our community claim to be only cooking recipes that they have cooked before and only 12% are trying to keep things as simple as possible.



At Hearst, we continue to focus on producing recipes that are delicious, simple and designed for a world where sometimes you can’t get all key ingredients. For those with kids, there has been a significant increase in getting children involved with the cooking, a great chance to both share the load and educate the next generation.

Going forward consumers are going to have expanded their culinary range and will have tried new things. New recipes and techniques will have entered consumers’ repertoires and brands are going to have an opportunity to help consumers keep things interesting in the kitchen and fuel these new passions with fresh and relevant content.

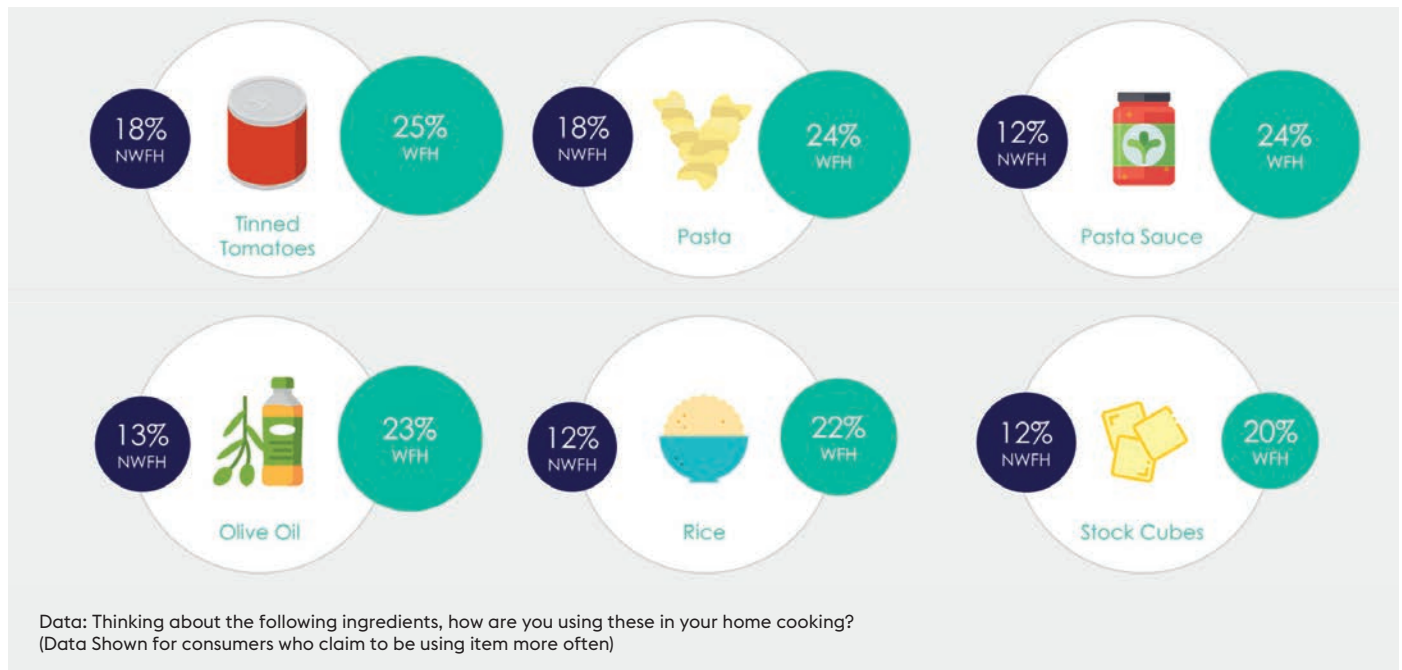
38%

of those working from home are cooking more new recipes

PANDEMIC PANTRIES AND CULINARY PLAY

As has been widely reported by Kantar, an extra £63 of food was purchased per household in March as people prepared for lockdown. 257 out of the 285 subcategories tracked by Kantar in retail showed growth as more consumers purchased more categories. Similar trends were noted in other European countries like Spain, Italy and France.

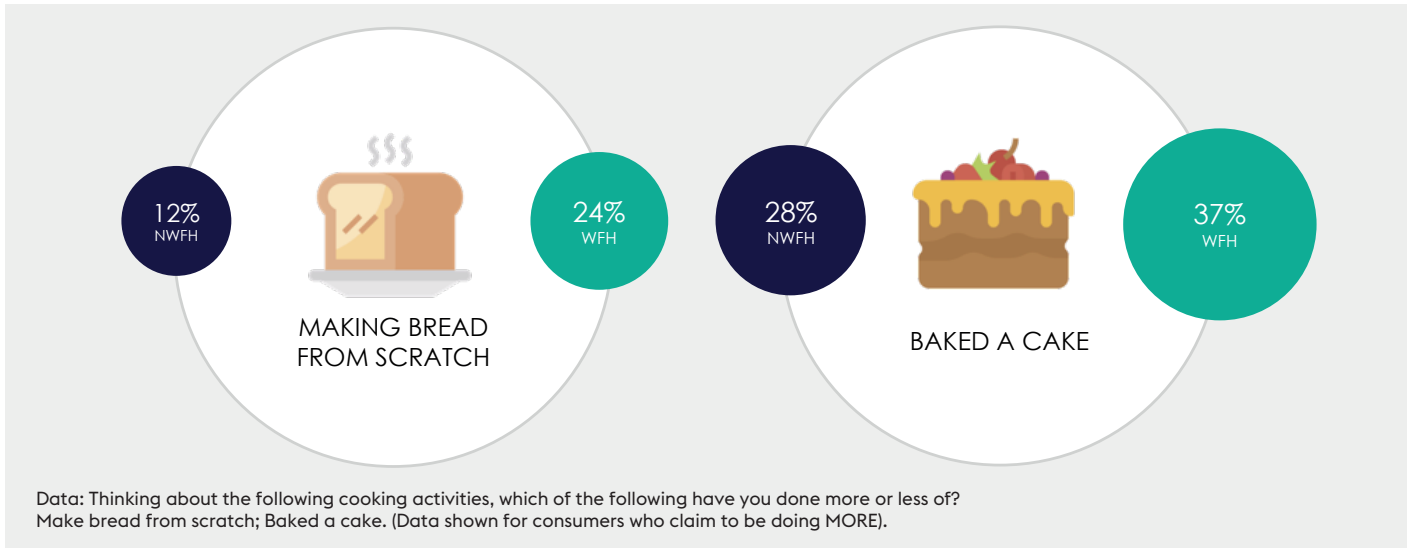
The food categories that had significant growth in March according to Kantar included canned tomatoes, flour, pasta, and tinned vegetables and fish. The good news for brands is that it seems that most of the products that were purchased in large quantities are being consumed in higher volumes than normal. According to Google Trends, pasta and rice-related recipes are running at close to double the rate that they were this time last year.



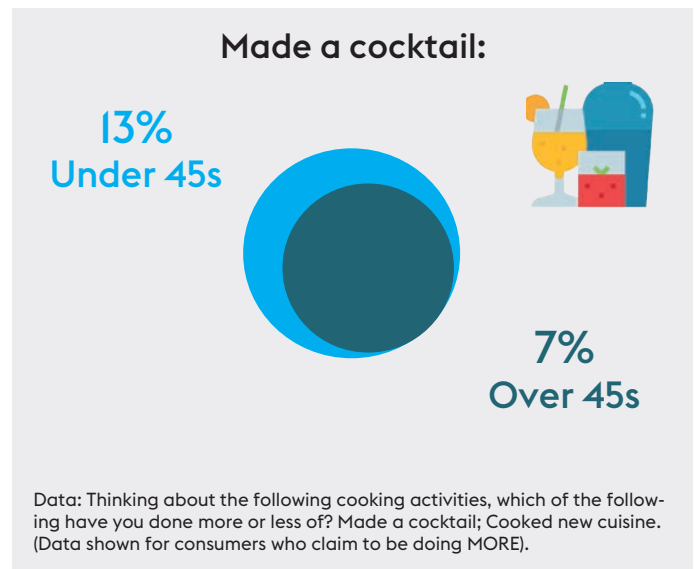
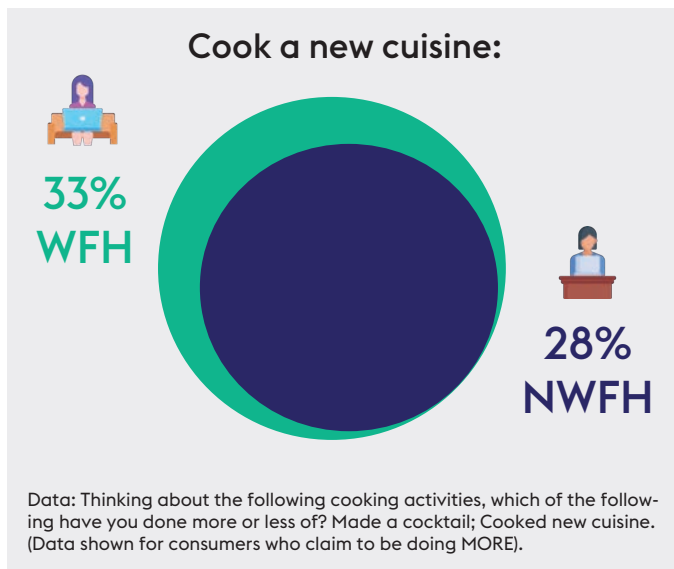
The challenge for brands is that according to the Kantar COVID Barometer (19 March), only 27% of consumers claimed they completely agreed that they were buying the same brands as usual. During this period, many key items have been out of stock and many consumers have chosen to visit stores that are very close to their homes, a move that helped drive 40% growth in the convenience sector (Kantar - March 2020). Many consumers will have ended up with new brands in their store cupboard and if the experience of using them was positive, they may well be purchased again. As the UK enters a recession, brands that charge a premium in what some consider commodity categories, will need to justify their premium and create messaging and content that connects with consumers.

While the full lockdown didn't come into force until 23rd March, restaurant bookings across the UK were down 20% on 12th March and 60% by 16 according to OpenTable. With eating out no longer an option and extra meals to cook, consumers have had to get creative and tackle new culinary tasks. From trying to work out how to cook a jacket potato in a microwave (+170% - Google Trends) to establishing how to cook a soft boiled egg (+50% - Google Trends), recipe and cooking related search have broadly doubled. Consumers have sought out recipes that didn't rely on core ingredients that were hard to come by (Flourless cake +250% - Google Trends) and things that might have been discovered while on a walk like wild garlic recipes (+90% - Google Trends). On Delish, the largest food website in the US and recently launched in the UK, we have seen great engagement on some of our more playful recipes like Marmite Baked Potatoes!

Amongst those who are working from home, there is an increased interest in cooking things that require more time and are often picked up from specialist stores that are currently closed. According to research, consumers are making more bread from scratch and baking more cakes. Google Trends proves that both the ambitious (sourdough starter recipes +190%) and the beginners (easy cake recipes for beginners +200%) are embracing this trend.



According to Kantar, eating out again is the second-highest ranked activity that people want to do after this period is over (after pampering). It, therefore, makes sense that with restaurants still closed, people are trying to recreate the experiences they are missing. The number of people who are trying to cook new cuisines has increased as have those looking for street food recipes (+450% according to Google Trends). They are also trying their hand at cocktails more than usual, which have seen search traffic double versus where it was at this time last year, according to Google Trends.

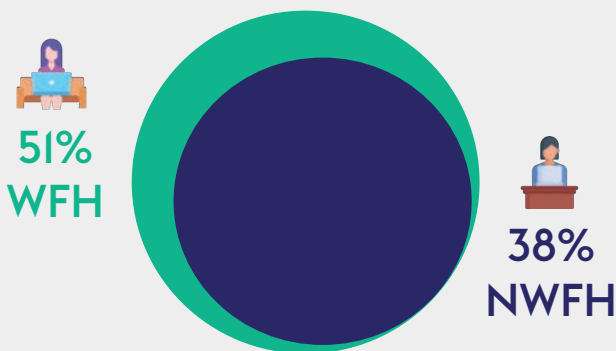


Hearst has exploited this trend with articles on how to recreate the Big Mac in Men’s Health, shared a simple slow cooker Nando chicken recipe on Delish and even promoted a story about how people can recreate classic Gregg’s items at home on Cosmopolitan’s website. When lockdown ends, consumers will be able to visit their favourite restaurants again but it will be against a backdrop of deep financial uncertainty. The last recession in 2008, led to a rise in home cooking. Coupling this with the possibility of a second wave of Coronavirus, a particular worry for those with or related to those with underlying health conditions and it is extremely likely that there will be more home-cooked meals in the years ahead. Brands need to address this consumer moment and find ways to relevantly engage.

HOMELY EATING

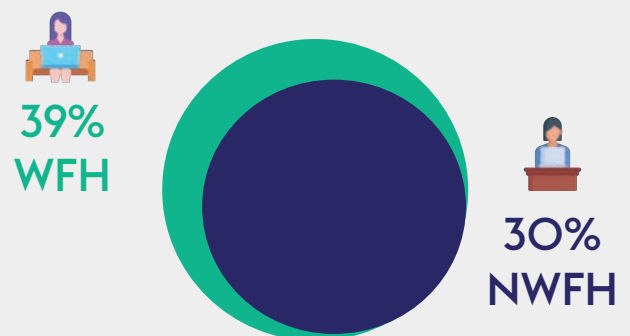
For those who are working from home, it is clear that the experience is changing the way that people are eating. When you look at the times that people are eating their three main meals, at least a third are claiming to be eating at a different time from 'normal', and this is even more extreme amongst those working from home. These are complex times where anxiety levels are running high about both the health and wellness of older members of society and the financial situation we find ourselves in. People are eating in what one might call an old-fashioned way, around a table and with family members. Despite the fact that people are watching considerably more television than normal, with average Easter weekend TV viewing up 48 minutes versus the previous year (BARB), people are not eating more TV dinners!

Eating more with my family:



Data: Thinking about your recent eating habits, which of the following statements do you agree with?: I am taking more time over my meals; I am eating more meals sitting around the table; I am eating more with the family. (Data shown for Strongly agree and Slightly agree)

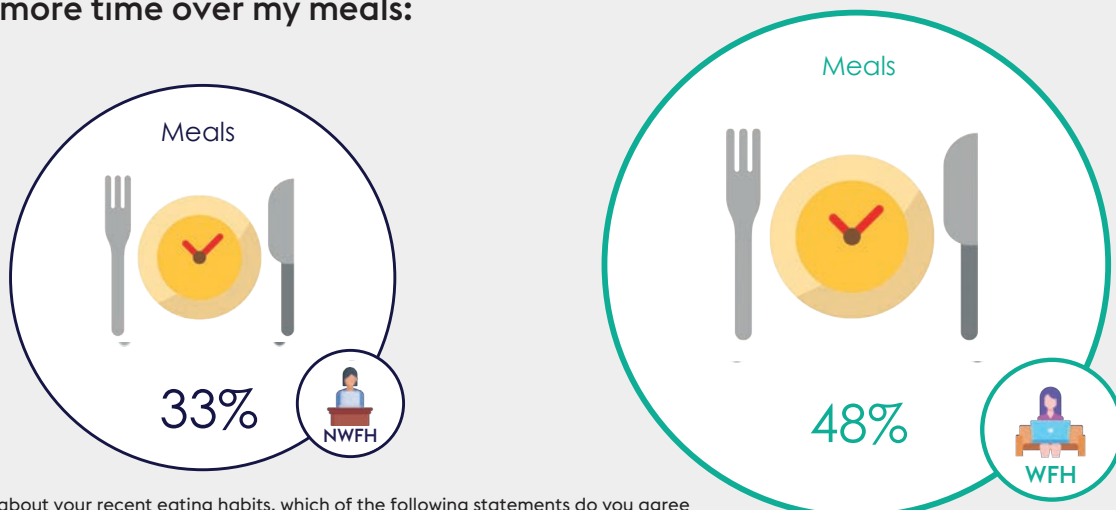
Eating more around the table:



Data: Thinking about your recent eating habits, which of the following statements do you agree with?: I am taking more time over my meals; I am eating more meals sitting around the table; I am eating more with the family. (Data shown for Strongly agree and Slightly agree)

It is widely assumed that people's work habits will not return to 'normal' as we have proven that we can work flexibly and it is likely that a certain level of anxiety about health issues will remain after the lockdown ends, particularly for those with households that have members with underlying health issues. This means that normal eating habits will not spring back into place and we may find that the trend towards slower eating with family members may continue. Add to this the financial challenges that we will face with the OBR predicting a 12% drop in GDP in 2020 and it seems prudent to assume that homely eating will continue as a theme into 2021. Brands catering to at-home eating have an opportunity to engage consumers like never before and provide meal solutions for these changing times.

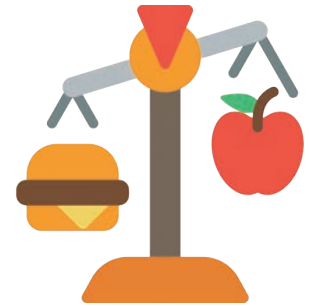
Taking more time over my meals:



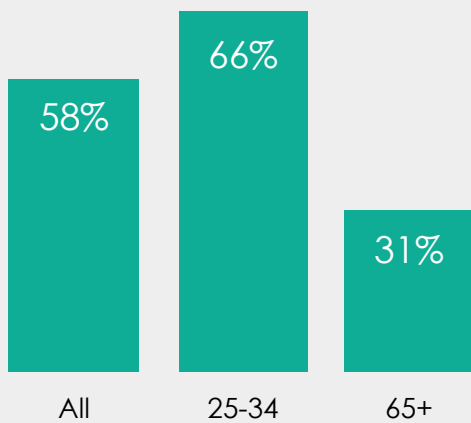
Data: Thinking about your recent eating habits, which of the following statements do you agree with?: I am taking more time over my meals; I am eating more meals sitting around the table; I am eating more with the family. (Data shown for Strongly agree and Slightly agree)

DIET

We are living through a time of incredible turmoil where normal routines have been upended overnight. Within this context, it is not surprising that 50% of people claimed that their diet had changed over the last few weeks. Many of our eating habits have been optimised to be borderline subconscious, but with new timings, new home-eating occasions and financial pressures long-established patterns have been broken.



I am snacking more:



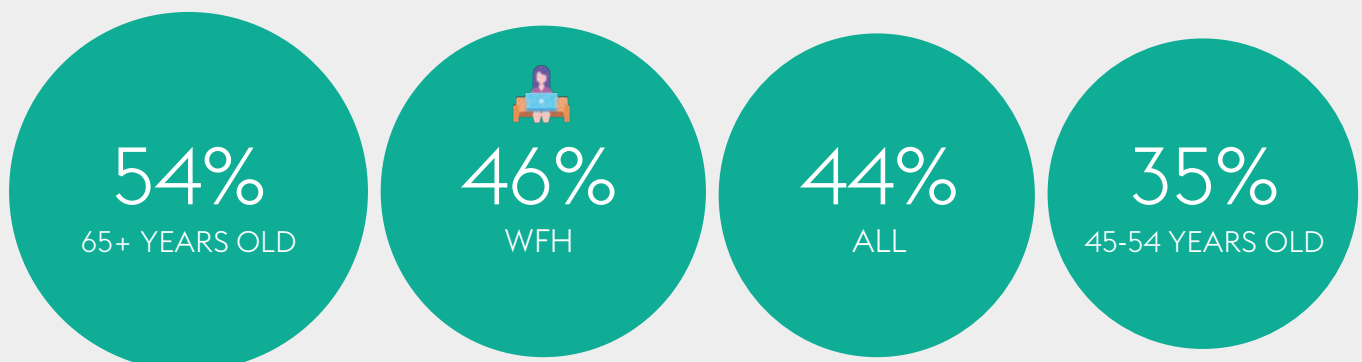
Data: Thinking about your eating habits as a whole over the last few weeks which of the following statements are true? I am snacking more. (Data shown for Strongly agree and Slightly agree)

Whilst those working from home have free access to our fridges and larders, offering comfort food and breaks from endless screen time. The reality is that everyone is snacking more, particularly the younger segments.

In addition, 60% of respondents are more concerned about putting on weight than usual and 29% of those working from home feel that they have put on weight over the last few weeks. With gyms closed and movement restricted, people seem to be trying to eat healthily, in the form of more vegetables, a trend that was seen in China during the recent Coronavirus outbreak.

After the 2003 SARS outbreak in China, Chinese consumers embraced foods that they deemed to be nutritionally sound, with dairy seeing increased demand from health-seeking consumers. In the UK we have never seen a health scare like this one and it is highly probable that consumers will think about their diet differently. Brands will have an opportunity to establish new and clear roles as attitudes towards health and wellness stabilise in the months ahead. Looking forward to the traditional flu season of 2021, it is likely that healthier eating will be one of the many tactics people will try to stay healthy.

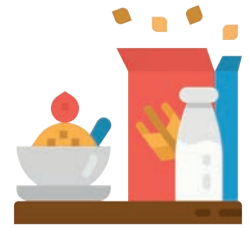
I am eating more vegetables:



Data: Thinking about your eating habits as a whole over the last few weeks which of the following statements are true? I am eating more vegetables. (Data shown for Strongly agree and Slightly agree)

BREAKFAST OF CHAMPIONS

Breakfast is a meal where consumers often operate on auto-pilot in order to get out the door for work or deal with getting other family members leaving the home. During these times of change, 37% of our community claim that their breakfast habits have changed and this increases to 45% amongst our community that are working from home. 40% of those working from home are taking more time over their breakfast and almost a third are claiming to be eating more for breakfast. It also seems that over 40% of those working from home are taking advantage of the lack of their commute to work and are eating breakfast a bit later than usual.

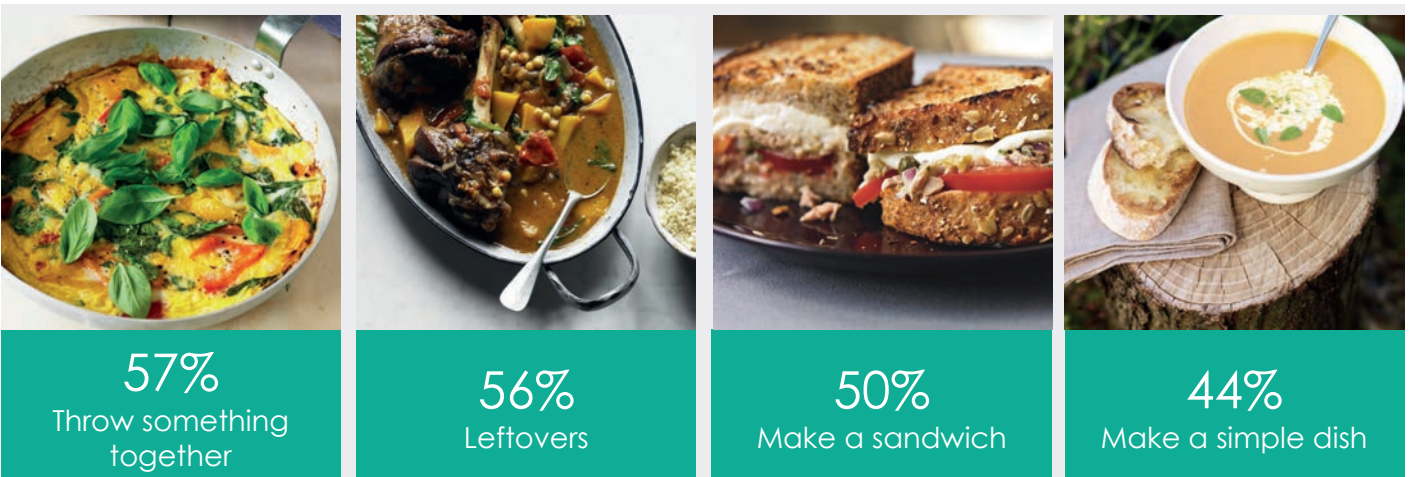


For years, breakfast NPD has been focused around on-the-go breakfasts, Quaker’s ‘Porridge to Go’ being a notable example, and our major cities are full of places to grab breakfast. As people increase the numbers of days they try to work from home and/or potentially staggered start times to avoid rush hour in major cities, it may be that ‘the working from home breakfast’ becomes a new meal occasion that brands can address.

LUNCH: FROM DESK TO HOME ENJOYMENT

In a recent poll amongst Esquire, Men’s Health and Women’s Health readers, almost 70% admitted eating lunch at their desk. However, the context of home working has changed this. 37% of our community who are now working from home claim to be enjoying lunch more than usual and 41% are taking more time over lunch than they would at work. Impressively, over a third of our home-working community claim that the meals being eaten are more varied and exciting and many (25%) see them as healthier.

The dishes being eaten at home for lunch are speedy, economical and resourceful, often focused around salad, soup and eggs. More traditional cheats like ready meals (7%) and pre-made dishes that people personalise (12%) are being ignored as are more involved dishes like stir fry and pasta.



Data: Which of the following have you been doing now that you are having lunch at home during recent weeks?
(Data shown for those who selected dishes)

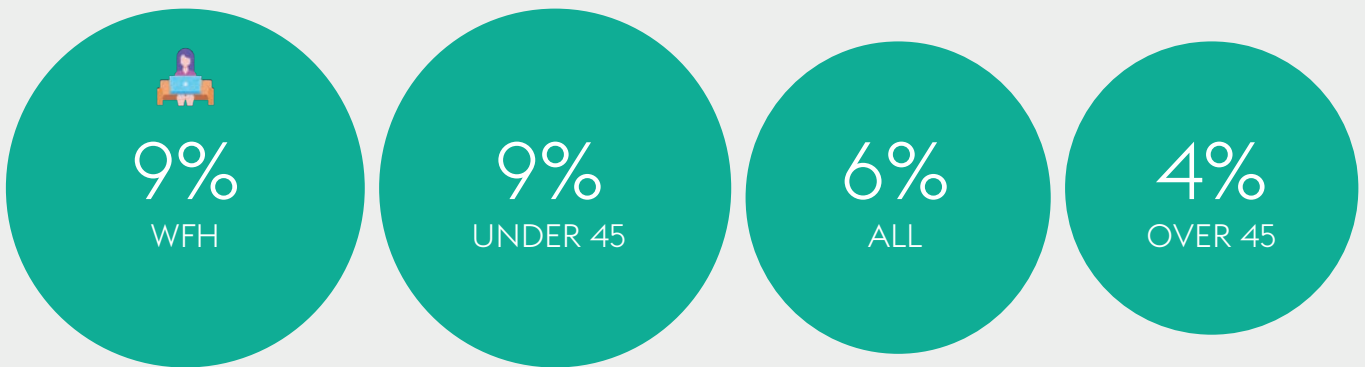
The eventual return to work will be haunted by increased financial pressures and consumers will be looking for ways to save money. High-street chains will have to innovate to attract their once loyal consumer base. Now that people have potentially got used to a healthier homemade lunch, it might mean that taking lunch to work is a more credible (and cost-saving) option. Add to this, the likelihood that more will continue to work from home, at least for some of the time, it seems that our weekday lunches will emerge out of this crisis rather differently. Brands that used to own lunch will have to fight to re-establish their role as other brands and products will have made significant headway into this meal occasion.

DINNER

It might be assumed that with no chances of eating out and increased home cooking, more consumers would be ordering a takeaway. However, according to Similarweb, key takeaway brands like Just Eat and Deliveroo saw no increase in monthly web traffic in March and were also hit with many suppliers being forced to close due to Government initiatives. Amongst Hearst's more affluent and urban community only 6% of our community claim to be ordering more takeaways than usual. The reality is that takeaway is perceived, even by its fans, to be expensive and unhealthy, and so it is not well aligned with increased consumer concerns about weight health and financial pressures.



Order takeaway more in recent week:



White goods supplier ao.com said freezer sales had increased by around 200% in the two weeks prior to the lockdown, compared to the same time last year. For the week of 20th March, Google searches for 'can I freeze' was around 10x higher than normal levels, with 'can I freeze milk' and 'can I freeze eggs' topping the searches. Now that more people have fully stocked freezers, they are turning to them for meal solutions with 32% of our community claiming to be defrosting something for their evening meal more than usual. For years, the frozen food industry and specialist retailers like Iceland have tried to convince consumers that frozen can equal fresh. With more freezers in homes and more experience of using them as part of regular meal planning, there is an opportunity for brands to engage with the frozen sector with relevant NPD and content.

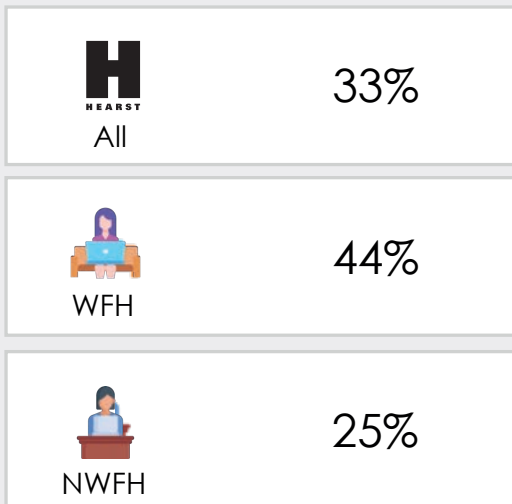


VIRTUAL ENTERTAINMENT

Much has been made of Brits turning to platforms like Zoom, Houseparty, Skype and others to connect with friends during the Coronavirus lockdown. Zoom has reported extraordinary global growth with their daily users jumping from 10 million to 200 million, while Skype's app was downloaded 27 million times in March according to Priori data. Netflix has promoted Watch Parties and Women's Health hosted a health-focused weekend across its digital platforms that reached 9m. A third of our community have had a virtual drink with friends and family and almost a quarter have attended a virtual party, defined as a gathering of more than six people. Not surprisingly, those working from home are the most likely to adopt this new behaviour, as are readers of Cosmopolitan, Elle, Red, Women's Health and Harper's Bazaar.

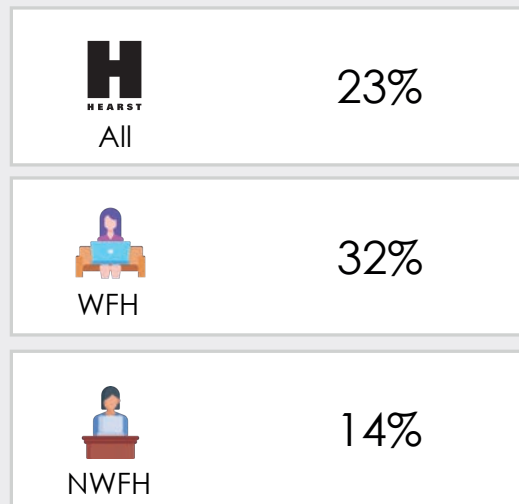


Virtual Drink with friends and family:



Data - Have you been part of any virtual social events over recent weeks using Facetime, Zoom, Skype etc?? Had a drink with friend or family virtually; (Data shown for YES)

Attended a virtual party:



Data - Have you been part of any virtual social events over recent weeks using Facetime, Zoom, Skype etc?? Attended a virtual party (more than 6 people) (Data shown for YES)

We have lived through a digital revolution in a matter of weeks. We have realised the breadth of what is possible online, from morning workouts with Joe Wicks, virtual classrooms for many kids around the world and digital festivals from brands like Camp Bestival. At Elle, we have done articles on how to get the most out of video conferencing apps and given advice on Good Housekeeping on how to keep your video calls private. Esquire has taken this up a level with a Golden Eye watching party with over 600,000 people with Pierce Brosnan, while Delish is hosting regular virtual pub quizzes. Brands have also leaned in to try and help consumers socialise in ways that recall pre-Coronavirus days. London brewery Signature Brew launched 'pub in a box', a delivery solution that includes a range of beers, glassware, snacks and even a music quiz.

The interesting thing to note is that the longer the lockdown continues, the more likely it is that consumers will jump on the virtual social bandwagon. Amongst our audience, 24% haven't engaged yet with digital socialising but are actively considering it, leaving only 35% who claim to be not interested at all. Going forward, we will not be able to undo this digital revolution and it is likely that we will continue to attend online events, and use virtual platforms to invite in friends for dinner if they can't attend in person. With some of the more alarming futurologists predicting that Coronavirus will haunt the human race for years to come, this prediction of a future where the worlds of digital and physical combine seem likely. Brands will need to work with digital businesses that have significant digital reach as physical events alone will not be enough.