

DIET, SUPERFOODS AND WELLBEING

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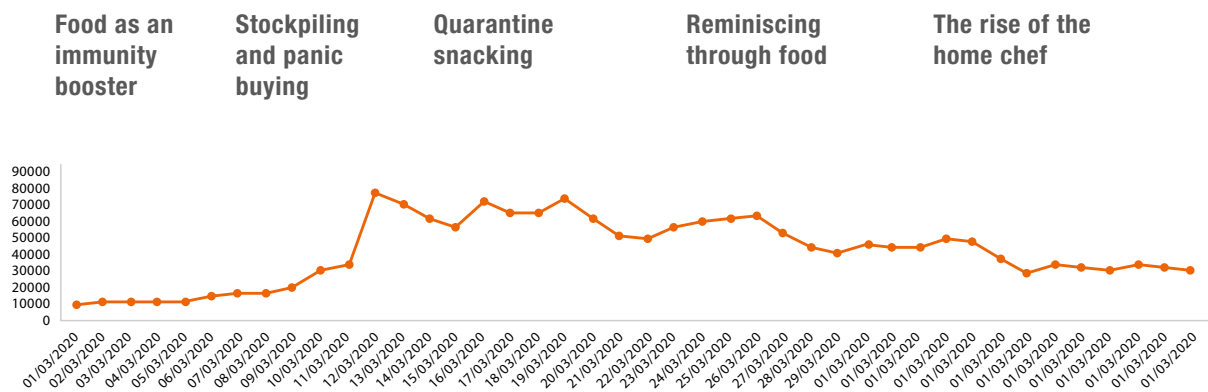


INTRODUCTION

Indians have a love affair with food! A country of 1.3 billion people has as much diversity in its food habits as it has in its people. Food plays a strong part of Indian culture and tradition and unites people despite culinary differences. There is an emerging trend of people looking for avenues to build and maintain a healthy lifestyle by proactively choosing the right food products to meet their diet and health goals. As a nation, India continues to improve on all indices of health, such as quality and longevity of life. Indians are living better, longer and have healthier life spans – food choices are an important part of that. A recent study found that the spend on healthcare goods and services grew by 14% over the last decade to touch Rs. 5 trillion in 2018.¹ With the COVID-19 situation, the focus on healthy eating and building self-immunity has risen further.

The pandemic has brought the virtues of home food back in focus. People are rediscovering their cooking skills and the rise of home chefs – people who earn an income through food supplied from their home kitchens – is creating a new booming business.² Over the past few months, we have been monitoring global English-language social media conversations about the COVID-19 pandemic. Conversations about food have focused on key themes including ‘food as an immunity booster’, where fear drove people to seek some form of control over the situation by taking measures they perceived as preventative. ‘Quarantine snacking’ is another theme which reflects a broader, long-term trend we see from social media – clean eating vs. indulgent eating – but it has become heightened as a result of the crisis (see Figure 1).³

Figure 1 English-language conversations online around food



Source: *The impact of COVID-19 on how we eat, May 2020, Ipsos*

HOLISTIC HEALTH GOALS

What health means to people has been redefined, and not just due to COVID-19. Health is no longer just good health or longevity but now encompasses sustained physical vitality and mental alacrity. There is new-found awareness of personal health goals being as important as career and other goals. With longer and more stressful living, as well as lifestyle-related diseases on the rise, people believe that health cannot be taken lightly. Annual health check-ups are

becoming de rigueur for millennials and young people, not just the middle-aged and the elderly. The emphasis today is on holistic and sustainable health management, gyms, yoga and meditation retreats, and rejuvenating spas. Marathon runs, walkathons, detox programmes, and health-related workshops in holiday resorts are growing in popularity, along with a preference for natural and organic products. These are all indicators of this quest for healthy living.



NUTRITION – A KEY FACTOR

One of the most significant manifestations of this aspiration for better health is in changing food habits. Today's digitally connected consumer stays informed of new diets and fads, about macro and micronutrients, calorie counts and portion controls. Even Gen Z are becoming extremely conscious about what they eat. The Isobar-Ipsos survey in India on Gen Z shows that 78% consider themselves conscious eaters and ensure their meals are balanced, while 56% follow a specified diet, with intermittent fasting being one of the most popular. Even during the COVID-19 lockdown and restrictions, Gen Z were taking definitive steps to strengthen their immunity by eating healthy foods and fruits (62%), more so than their efforts to maintain proper hygiene (52%). Despite healthy eating, Gen Z have gained weight during lockdown (74%) but they remain conscious of their diet, eating healthily and avoiding oily food (47%).⁴

Social media analysis shows us there is a small but growing adoption of vegan diets, along with subscription-based diets like Keto, calorie-counted meals and low-carb meals. While taste remains the main driver for preference across categories, it is tempered by strong nutritional-based claims to bolster the health promise. This has prompted food and beverage manufacturers to reduce salt and sugar in their products, including Maggi reducing salt in their recipe and Coke and Pepsi lowering sugar and replacing stevia – or by launching healthier alternatives. Even Cadbury chocolate now comes with a 30% reduced sugar variant. Similarly, in the snacking category, which is heavily skewed in favour of traditional deep-fried products, we are witnessing an emerging preference for baked offerings and substitutes like oats in various flavours, energy bars, foxnuts (makhanas) and other healthier options.

It is not surprising therefore that health and wellness has been on the agenda of major food companies. Modern retail outlets offer an array of products for the conscious and discerning consumer meeting specific dietary requirements. Restaurants and food chains are also introducing healthier options in their everyday menus.⁵ Packaged food and beverage manufacturers continue to reduce the fat, sugar and salt content of their products and combat the stiffer compliance norms under consumer and government pressure.

EATING RIGHT ESPECIALLY IN TIMES OF COVID

The extended lockdown in India has meant that consumers have reposed their confidence in home food. Men and women have re-discovered the delights of home cooking. The Indian kitchen is witnessing an influx of healthy ingredients – many of them exotic in nature; unsaturated cooking oils, skimmed milk, sugar substitutes, low fat dairy products and lean meats. Our breads are being preferred with whole wheat grains and our rice sans polish. Urban households choose multi grain atta (flour) over regular atta, either packaged or made with a mix of specially bought grains (which are ground at nearby flour mills for the atta to retain freshness). Traditional flours such as amaranth, nachni, makai, jowar and bajra have gained popularity because of their low glycemic index and additional nutritional benefits. People today are demanding their products are made from these super-flours instead of traditionally used refined wheat flour. Focus on healthy eating also means being conscious of food sourcing. An increasing section of consumers are showing a preference for organic and 'straight from the farm' natural produce. A global 28-country Ipsos study found that the APAC region is significantly more likely to associate natural with 'authentic'.⁶

Overall, the emphasis at home is to keep food simple and healthy with minimal oil, sugar and salt. New entrants like oats, millet and quinoa come with strong health claims and are becoming increasingly popular. The unfancied yet nutritious breakfast offering, Oats and Daliya (broken wheat), has bucked the FMCG sluggish trend and witnessed double digit growth. Carbonated drinks with empty calories are

losing favour to fresh/old pressed juices, flavoured water, smoothies and milkshakes. The success of brands like Ocean, Raw Pressery and Keventers is a case in point.

Immunity building as a promise has also increased in many products ranging from teas to ingredients like turmeric. Content discovery and advertising platform Taboola⁷ found a 39% increase in pageview traffic to stories related to health claims about turmeric and immunity-boosting foods during the lockdown (to 5.6 million views). The AYUSH Ministry⁸ prescribing Ayurveda and immunity boosting food has led to renewed focus on drinking kadha (a liquid concoction of Indian spices, sometimes drunk with added tea leaves) and eating supplements like Chyawanprash (an ayurvedic recipe of an immunity building mixture). Superfood turmeric (haldi) has been taken up in many recent product launches like haldi milk from national and regional brands like Amul, Mother Dairy and Nandani. DairyDay, a small local manufacturer, launched haldi and Chyawanprash ice-creams.⁹

Among the health food products, fortified/functional packaged food has gained favour, encouraging many consumers to upgrade to value-added products. With the conscious search for obtaining optimum nutrition, 'more good' with strong ingredient stories have managed to convince consumers to loosen their purse strings and pay a premium often to the extent of over 50%. Examples are fortified biscuits, breakfast cereals, multi-grain atta, green tea and healthy edible oils.

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SAFETY FIRST

Safety and hygiene expectedly will be top of mind for customers, with contactless dining the new mantra for all brands. Dominos has introduced 'Zero Contact Delivery' across all of their 1,325 restaurants in India.¹⁰

Based on a recent consumer survey by restaurant tech platform, Dineout, Indian diners are now ranking safety assurances and premier hygiene as top factors when it comes to choosing a restaurant to dine in.¹¹ The survey, conducted in April 2020 across 20 cities, revealed in a post COVID-19 era, 81% of diners will prefer digital menus at restaurants while 77% will continue to want to dine out.

The survey further discovered that 23% of people would prefer continuing with delivery/takeaway. Six months later, the COVID situation continues to be grim. Even as restaurants and dine outs reopen slowly, safety concerns remain paramount for customers and it will take a long time for eateries to work at full capacity.

Another trend that is likely to play up is about a 'no sharing' policy. Pizza brands are considering individual box packs for consumers to savour their respective portions without any safety and hygiene fears. Clearly the Indian consumer today wants his food to provide safety beyond being tasty and healthy.¹²



CONTRADICTIONS GALORE

While we talk of the trends towards healthy eating, holistic health and immunity building, we should also consider the 'snacking and indulgence' phenomenon we see in most households. Around 10% of Indians consume fried foods daily and 36% weekly, according to the recent National Family Health Survey.¹³ Trends to the Table, an Ipsos survey in India on online food ordering, shows that despite a claimed preference for healthier food options, in terms of orders, Biryani tops the chart and is a favourite across regions.¹⁴

This contradiction is even more pronounced during major festivals in India. Conscious eating is set aside to make space for traditional festive meals and sweets – which is all a part of socialising, celebrating with family and making exceptions to one's diet.

Modern lifestyle pressures also often push consumers towards comfort food that works as a 'pick me up'. Consumers are looking to manage their emotional wellbeing and treating themselves with indulgent food is one way of managing bouts of stress. During the lockdown period, the Ipsos Essential Tracker showed how urban Indians are hopeful and optimistic about the lifting of lockdown on one hand, while dealing with financial worries and health anxieties on the other. This emotional tug-of-war has manifested in many ways such as insomnia and overeating.¹⁵

While dining out is still restricted, there is no stopping delivery of restaurant and 'home style' food. The food delivery business is booming and serving the need for both indulgence and convenience. Some fine dining restaurants in 5-star hotels have also started deliveries of their gourmet cuisine. To reassure customers, many are noting down their safety precautions and some provide the temperature of their chef and of the packing and delivery staff.

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KEY TAKEAWAYS

THE CONSUMER HEALTH AWAKENING

The pandemic has forced consumers to re-evaluate their lives and their daily habits. Rising consciousness of preserving their health has meant consumers are making conscious choices when it comes to food and nutrition. The new empowered consumer wants to take charge of their own health. They are tough and demanding of products and their health claims. They understand what they eat is an essential contributor to better health, immunity and living well. They aspire to a disease-free, safe, better quality of life for themselves and their family.

MIRROR THIS EVOLUTION THROUGH BRAND PURPOSE

Brands need to start getting into future scenario planning and identify large macro trends that will drive consumer behaviour in a world grappling with fears of safety and hygiene.

Marketers of brands and services will need to take grasp of this changing mindset. They need to take a close look at the brand purpose and how that is relevant to the consumer and their evolving needs. The need for brands to be caring and empathetic will be stronger than ever before.

OFFER NEW, INNOVATIVE CHANNELS

Businesses will have to critically examine business models to get closer to consumers in terms of playing a meaningful role in their lives. Innovative brand offerings (healthy meal kits for example) and new distribution models which get products and services to the doorstep and offer greater convenience and value (from farm to home delivery for instance) will be most sought after.

HEALTHY NOT ABSTEMIOUS

An interesting data point showed pasta and noodles to be among the largest food categories consumed during the lockdown. Blame it on convenience or craving but it presents an interesting paradox in the context of the larger desire to eat healthy and embrace a fitter lifestyle. Suffice to say, consumers will seek to balance health with indulgence as they navigate these trying times. The overarching need for self-preservation will drive mindful consumption and brands positioned on strong health credentials (without compromises on taste) will inspire greater trust and affinity.¹⁶ Brands will need to find ways of addressing these twin demands of health and taste.

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GAME CHANGERS

