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2020 Global Food Trends Report

trust essential for future success

Trust Matters To:

Consumers	Employees	Regulators	Investors	Resilience Against Risk	The Market	Media Coverage
Trusted companies have stronger consumer buyers and advocates	Trust drives workplace recommendations	Trusted companies have greater license to operate	Trusted companies are more likely to receive institutional investment	Trusted companies are more resilient in the face of crisis	Trusted companies' stock outperform their respective sectors	Trusted companies are more immune to the media cycle

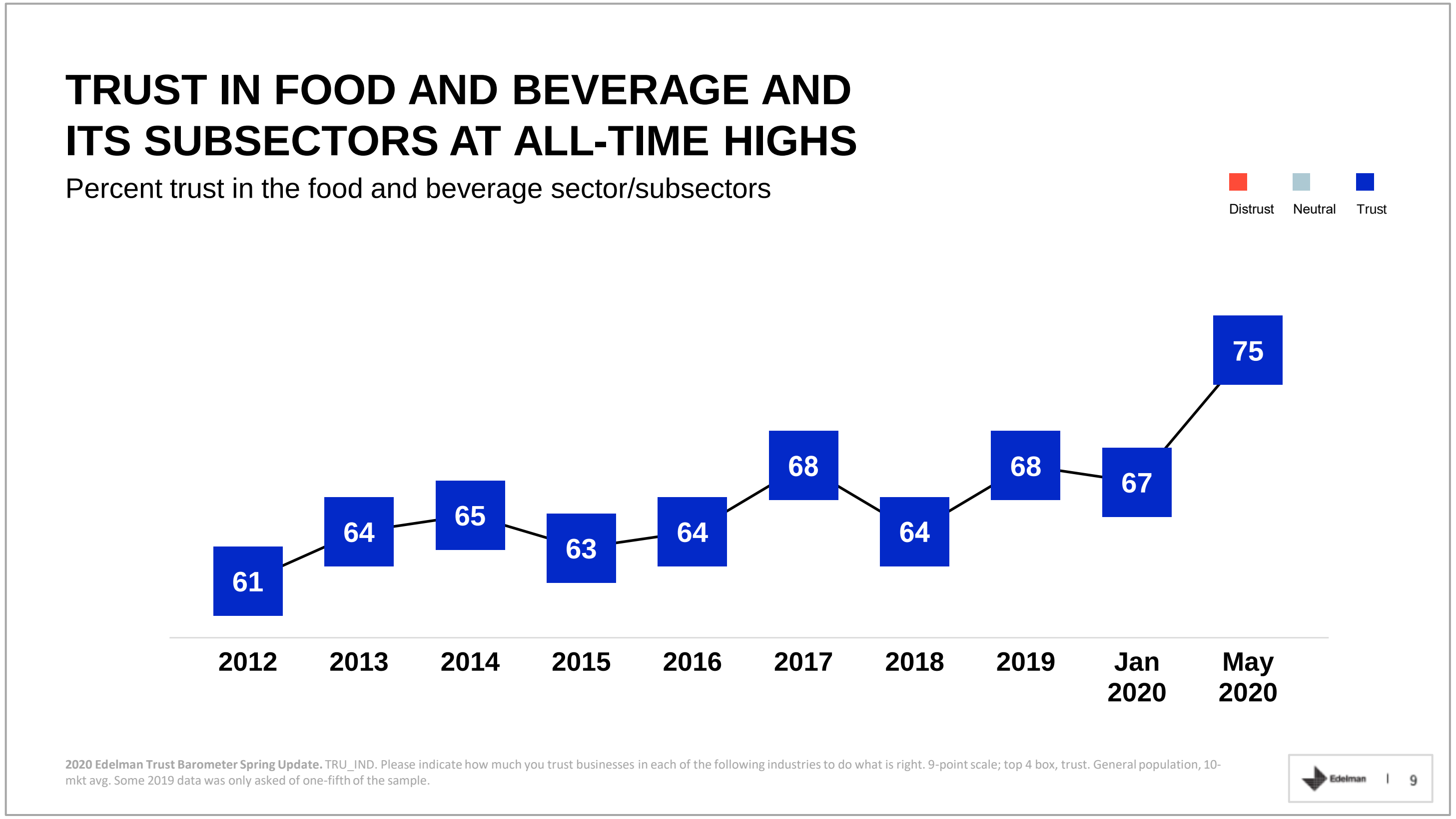
20 Years of Edelman Research on Trust

2M+ respondents	**400+** companies	**80k** employee reviews	**80+** models of trust
23M measures of trust	Review of **150+** academic articles and	Trust and stock price analysis for **80** companies	Interviews with **50+** business leaders

The Edelman Trust Barometer has been seeing shifts in the public's trust in F&B

Throughout the past years, we have seen that most substantive increases in trust result in a significant decrease the following year as companies struggle to maintain their relevance after seeing "**situational gains**."

Edelman Trust Barometer 2020



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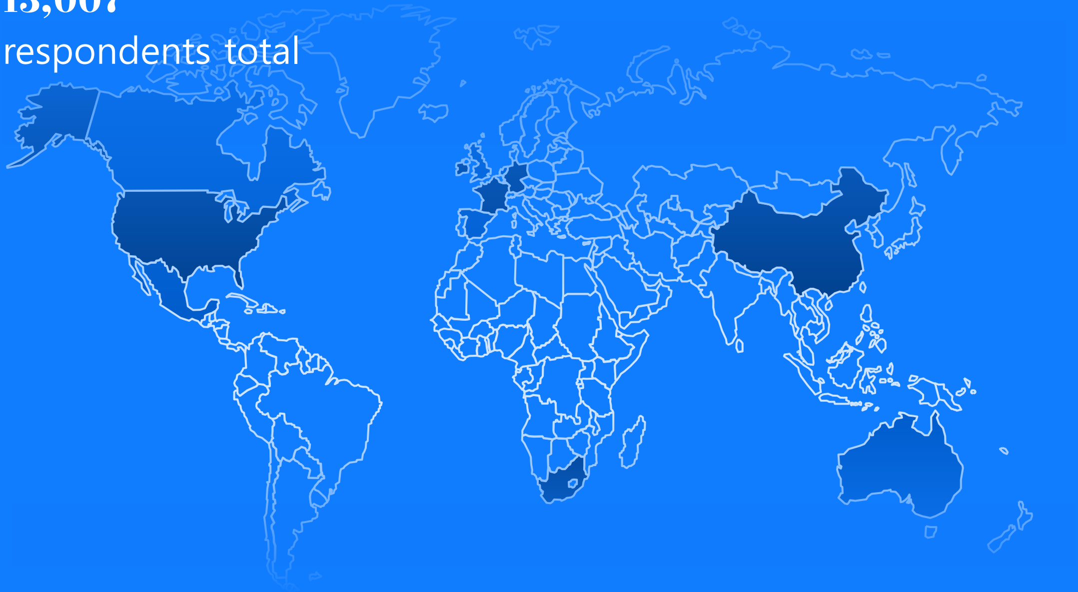
a methodology that explores people and culture

Quantitative Research

Online survey
in **13 markets**

13,007
respondents total

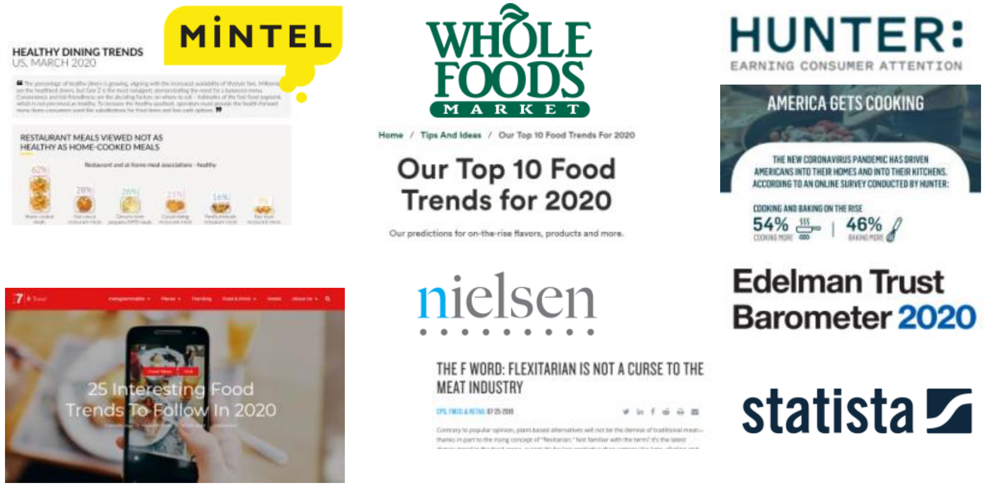
All fieldwork was
conducted between
March 11 - 30, 2020



Trend Analysis

Reviewed traditional and social media over the past 12 months to understand key drivers of conversation, purchasing behavior, and trust.

Mapped against all twelve subsectors of the industry.



13-market global data margin of error: General population +/- 0.6% (N=32,200), Market-specific data margin of error: General population +/- 2.9% (N=1,150). China and U.S. +/- 4.4% (N=500). Market-specific = +/- 5.3 to 10.5% (N=min 88, varies by market). Data is weighted to match general population demographic proportions per country.

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our goal:
help F&B brands navigate the complexities of trust to deepen relationships with the people that matter most

To Do This, We Explored The Following Questions:

1. **How is trust faring** in the F&B industry?

2. **How are people engaging** across different categories?

3. What are the **best ways to navigate key tensions** in the F&B industry?

4. What can companies do to **build trust?**

we uncovered five key takeaways for all F&B brands & business regardless of category

1.

People expect food & beverage companies to step up and **make a difference in the here and now;** **food waste and access** being the key priorities.

2.

Gaps in trust across the industry stem primarily from low levels of perceived **integrity and dependability**; focus on **solutions and transparency.**

3.

Food and beverage are a complex sector with **varying degrees of trust**; glory and impact come from **partnership** not ownership.

4.

Audiences have **different relationships** with what they eat and drink; effective strategies **appeal to individuals** over the masses.

5.

Trust comes from the **sum of many parts,** not one-off tactics; **create a roadmap** that connects your brand foundation to **consistent, trust driving actions.**

1. how is trust faring in the F&B industry?

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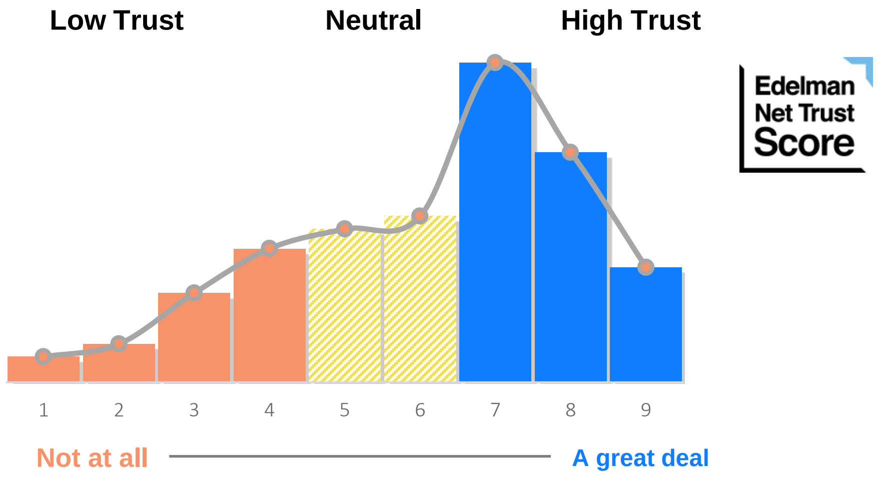
to understand why trust changes and how to change it, we looked to Edelman Trust Management

Determine Relative Trust

ENTS = HIGH TRUST – LOW TRUST

Based on overall trust: “Do you trust x to do what is right?”



Diagnose Performance Drivers

Trust

COMPETENCE, 20%

ETHICS, 80%

Ability
X is good at what it does

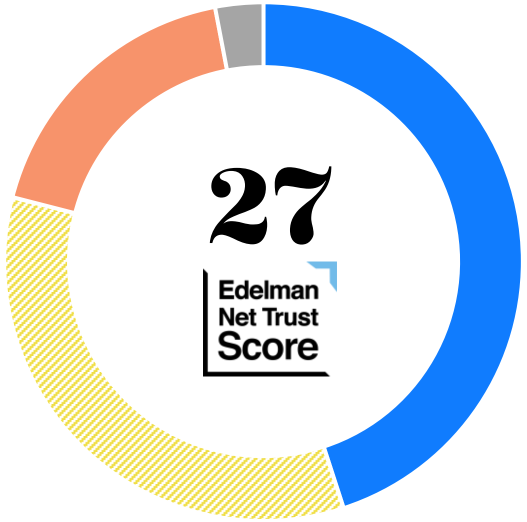
Integrity
X is honest

Dependability
X keeps its promises

Purpose
X is trying hard to have a positive impact on society

Performance against a series of **functional**, **emotional**, **rational**, and **aspirational** attributes and benefits that can be delivered to your customers

while trusters outnumber distrusters more than 2 to 1, the industry needs to focus on dependability + integrity



F&B ENTS by Market

China	59
Mexico	40
Italy	37
South Africa	31
US	29
Canada	29
Spain	27
Australia	26
UK	19
Netherlands	19
Ireland	17
Germany	9
France	8

Ability 40%
Is good at what they do

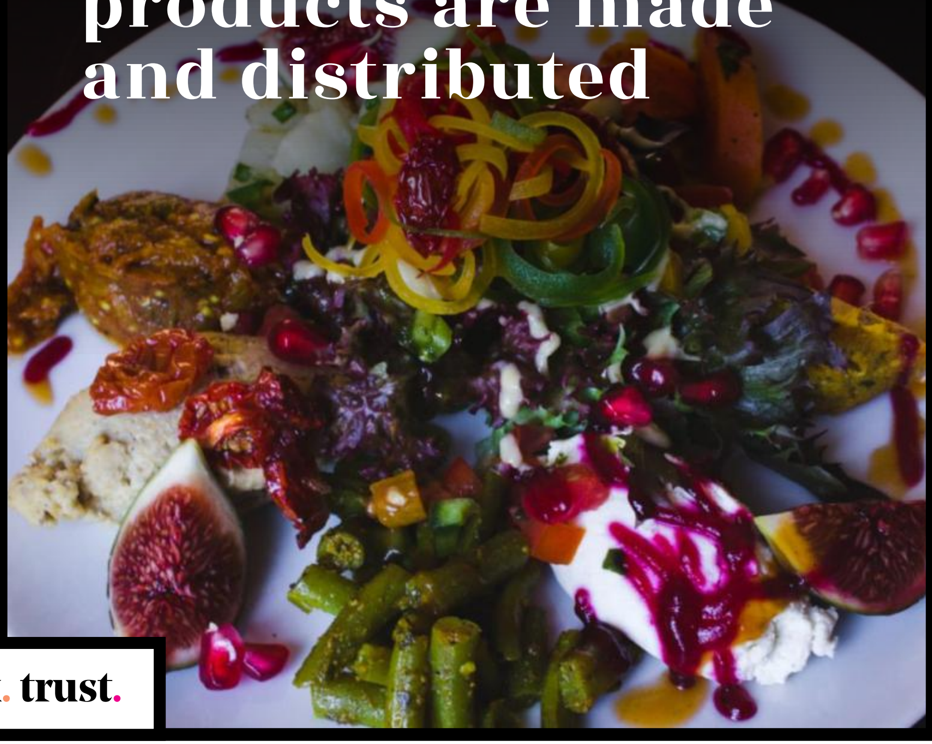
Integrity 28%
Is honest

Dependability 29%
Keeps its promises

Purpose 34%
Tries hard to have a positive impact on society

Base: Total (n=13,007) Please indicate how much you trust [XXX] to do what is right? 1-9 scale; NET: Top 3 (7-9) -- Bottom 4 (1-4). How much do you agree or disagree that [ORGANIZATION] is good at what it does? Q11A. To what extent do you agree or disagree that [ORGANIZATION] is honest? Q16B. To what extent do you agree or disagree that [ORGANIZATION] keeps its promises? Q12A. To what extent do you agree or disagree that [ORGANIZATION] is trying hard to have a positive impact on society? 1-7 scale; NET: Top 2

currently, only 1 in 5 people think F&B should “stay the course,” whereas most want innovation in how products are made and distributed



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% Agreeing “F&B Should Stay the Course”

18% Global Average

North America

United States **22%**

Canada **17%**

Mexico **12%**

Asia-Pacific

Australia **18%**

China **12%**

EMEA

Ireland **21%**

France **21%**

The Netherlands **21%**

UK **20%**

Germany **20%**

South Africa **18%**

Spain **17%**

Italy **17%**

Base: Total (n=13,007) Q5. For each of the following, please rate the extent to which you agree with one side versus the other or if you agree with both equally. Note: 11pt slider scale.

“”

As much as we need new thinking on global food system issues, we also need new doing.

Danielle Nierenberg,
Food Tank

so, what’s needed most from Food & Beverage?

1.

Embrace innovation with purpose and passion

2.

Address the **trust gaps**

3.

Strive to **think, operate,** and **act** better

this begins by understanding the recipe for building trusted & resilient relationships

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Start with a **strong brand foundation** & identity

Supported by **relevant proof points** from functional to aspirational

Ability | **Integrity** | **Dependability** | **Purpose**

Consistent action, commitment & transparency across stakeholders and supply chain

Trust starts to take shape and deepen across internal and external audiences

Constant adapting and adjusting based on **external influences**

2. how are people engaging across different categories within F&B?

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the world of food and beverage is incredibly diverse,

and its levels of trust are far from equal

when it comes to trusting companies to do what is right, people have mixed opinions across the industry

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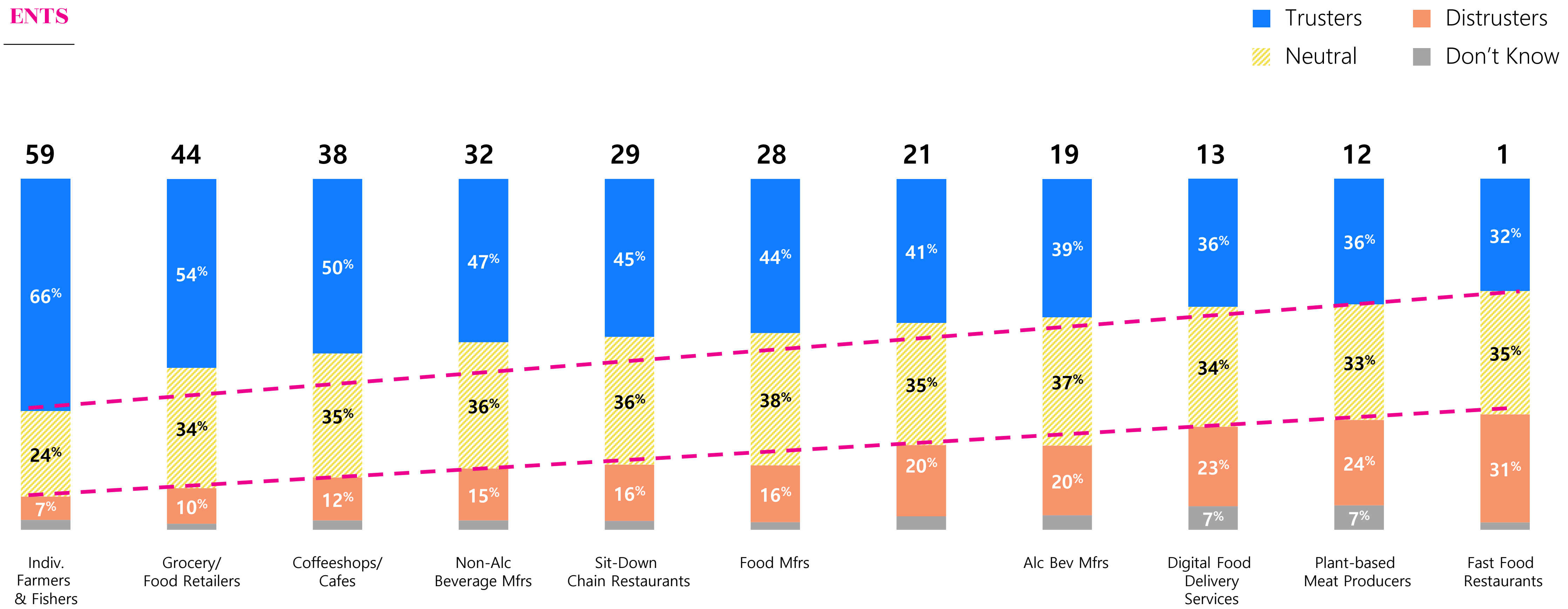

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the drivers of this polarity come down to two things: ethics and competence

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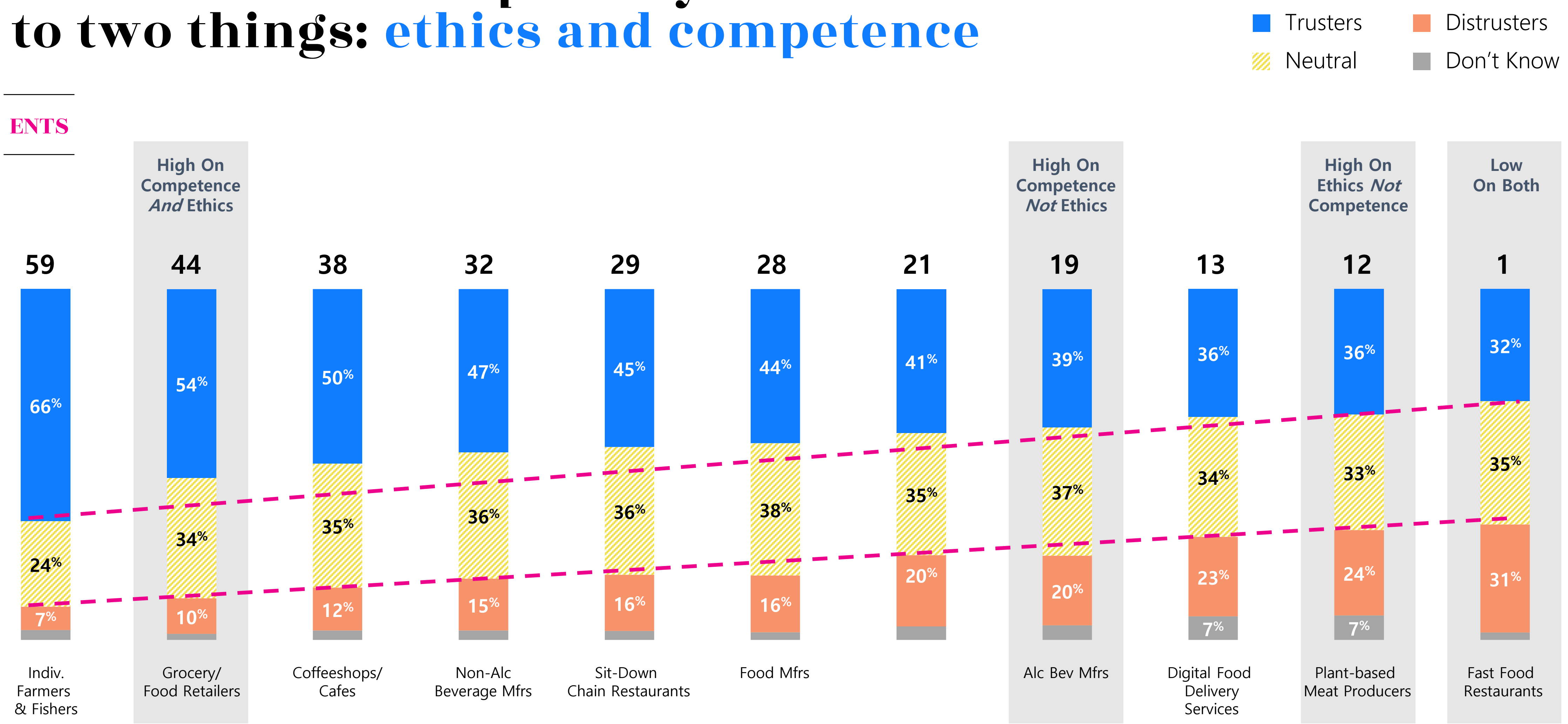

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different generations, different expectations

Gen Z

Trusting, Experimental with Purposeful Expectations

44% of Gen Zers highly trust the F&B industry

Highest trust found with

- ↑ 69% Digital Food Delivery Services
- ↑ 67% Plant-based Meat Producers

Across F&B, gives brands more credit for:

- +20% Educating consumers
- +23% Engaging in issues

Millennials

Engaged and More Trusting of Nostalgic Categories

↑ 30% More engaged with F&B brands

Believe Plant-based Meat Producers deliver on:

Taste	36%	+23%
Familiarity	34%	+33%

37% ↗ Higher trust in Alcoholic Beverage Manufacturers

Gen X

Low Engagement; High Passion for Home Cooking

38% Gen X is largely unengaged with the F&B Industry: over a third feel neutral towards five or more F&B sectors

But they're still involved with food & cooking:

- 72% Like to cook
- 65% Are the sole grocery shopper in their HHs
- 32% Say food & beverages are a passion

Boomers

Connected to the Comfort of Traditional

Most engaged with brands that provide Comfort (41%) or Competence (28%) – which they find most in grocery.

- ↓ 125% Lower trust in Plant-based Meat Producers
- ↓ 108% Lower trust in Digital Food Delivery Services

60% Don't see themselves ever shopping exclusively online for groceries

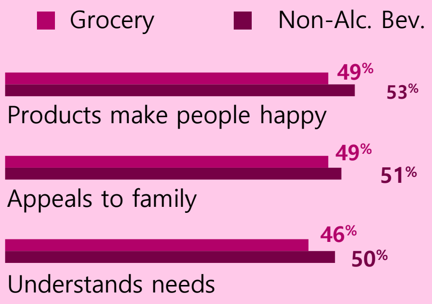
Note: Audience differences compared back to Global Total
Source: Eat. Drink. Trust.: Global Food Trends Survey, March 2020

beyond age, there are significant divides across audiences

Parents

Enjoy Brands For Support as Part of the Family

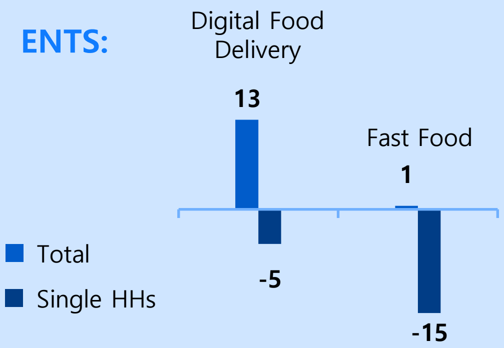
Parents trust the F&B industry more – with an average
11pt Higher ENTS
across all subsectors



Single Person HHs

Disengaged and Disenfranchised

Dimensions of Trust are rated lower across the F&B Industry by **22%** on average



Wealth Gap

Good Food is Considered a Luxury, Not a Right

Low Income		High Income
33%	Fast food is affordable	54%
25%	Plant-based meat producers are good at what they do	34%
33%	Alcoholic beverages appeal to family & friends	43%
39%	Food Mfrs. offer products for all consumers	51%

Employees*

Want More Leadership Than They Feel They're Getting

42% of F&B employees feel their employer is protecting the safety of essential workers

39% of F&B employees feel their employer is safeguarding their job

29% of F&B employees feel their CEO is doing an outstanding job meeting expectations

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Note: Audience differences compared back to Global Total
Source: Eat. Drink. Trust.: Global Food Trends Survey, March 2020
*Source: 2020 Edelman Trust Barometer Spring Update, May 2020

compared to established markets, emerging markets have...

...more trust in **Big + Scale**

65% more likely to agree that companies should be encouraged to maximize profitability

44% more focused on growing and stabilizing the economy as a top concern

23% more likely to say big companies will satisfy the consumers of the future

...more focus on **Responsible Tech**

54% more likely to believe tech will be able to solve many of the issues F&B companies are facing

2x higher trust in tech-led subsectors, such as digital grocery/food delivery

38% more likely to worry about the negative impact of technology on society

...more concerns about **Access + Nutrition**

77% more concerned about the negative impact of their diet

and

57% more likely to need to make changes to their lifestyle

20% less likely to believe that grocery can deliver on affordability

more likely to prioritize **fighting obesity** and **prioritizing public health** as top concerns for F&B companies to address

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Source: Eat. Drink. Trust.: Global Food Trends Survey, March 2020

what this means for engaging people across different F&B categories

DANONE

Build Trust Holistically, Not Narrowly.

Establishing and leveraging trust-based relationships means consistently proving competencies and a commitment to a higher-level purpose.

This can't be done with campaigns or communications that focus on one part of your business but rather aligning the whole organization from operations to marketing.

FritoLay Good fun!

Focus On Individuals, Not Mass Market.

Even for sectors that have 90%+ household penetration, it is necessary to tailor the experiences of and with your brand to the individual needs of different consumers rather than trying to push an outmoded one-size-fits-all model.

Consumers have enough choices that they will not take the time to translate "why you."

IMPERFECT FOODS

Enlighten People, Don't Just Educate.

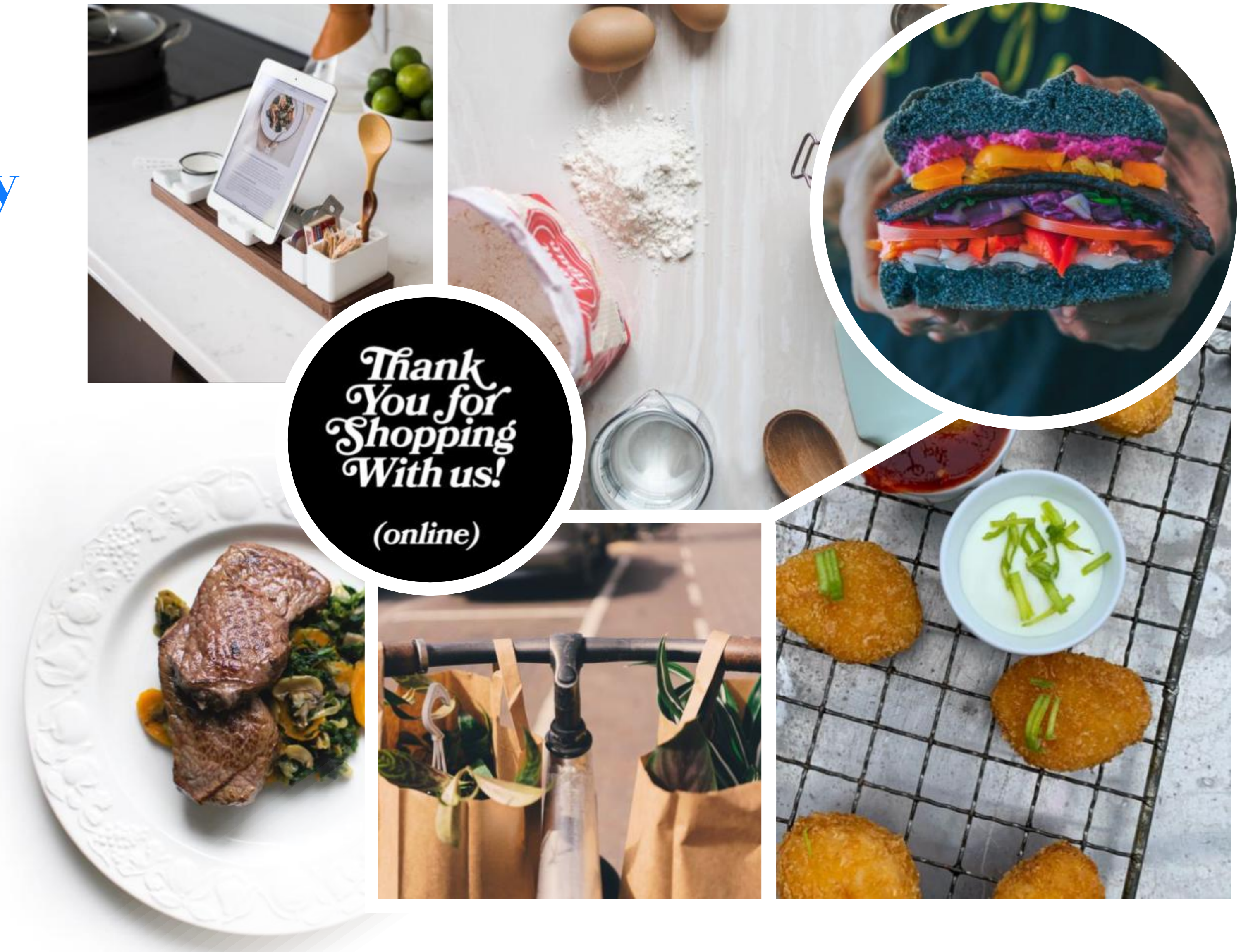
People generally feel like they know and understand the food and beverage space and have become confident in their knowledge, resulting in fully formed opinions about your brand often based on your category association.

To influence these opinions, look up to your consumers instead of talking down to them.

3. what are the best ways to navigate key tensions in the F&B industry?

trust is becoming more and more present in everyday consumer realities

as such, it's at the intersection of several tensions and debates we see in the industry



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the tensions we explored

1.
Accessibility vs.
Sustainability

2.
Food as Food vs.
Food as Politics

3.
Plant-Based:
Commitment vs. Choice

4.
Passion vs.
Reality

5.
Small + Local vs.
Big + Global

6.
Digital vs.
Brick & Mortar

accessibility vs. sustainability

"

We need to look beyond hunger. – Ensuring the right to adequate food is more than just having enough food on the table. It means empowering people to feed themselves and their family in dignity. It is about ensuring all children everywhere have access to the healthy diets they need to reach their full potential.

Jose Graziano da Silva,
Former Director-General of the U.N. Foodand Agriculture Organization (FAO)

What We Explored:

- Purpose vs Operations
- Premium vs. Equity
- Perception Across Industry
- What this Means for Brands & Business

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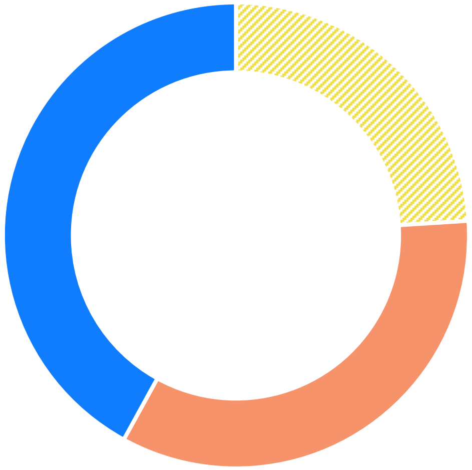
doing good for society is becoming an expectation for F&B companies – especially as we look at the big issues

F&B Companies Should First and Foremost Focus On...



- ...doing the most good for society **42%**
- Both equally **34%**
- ...satisfying consumer demand **24%**

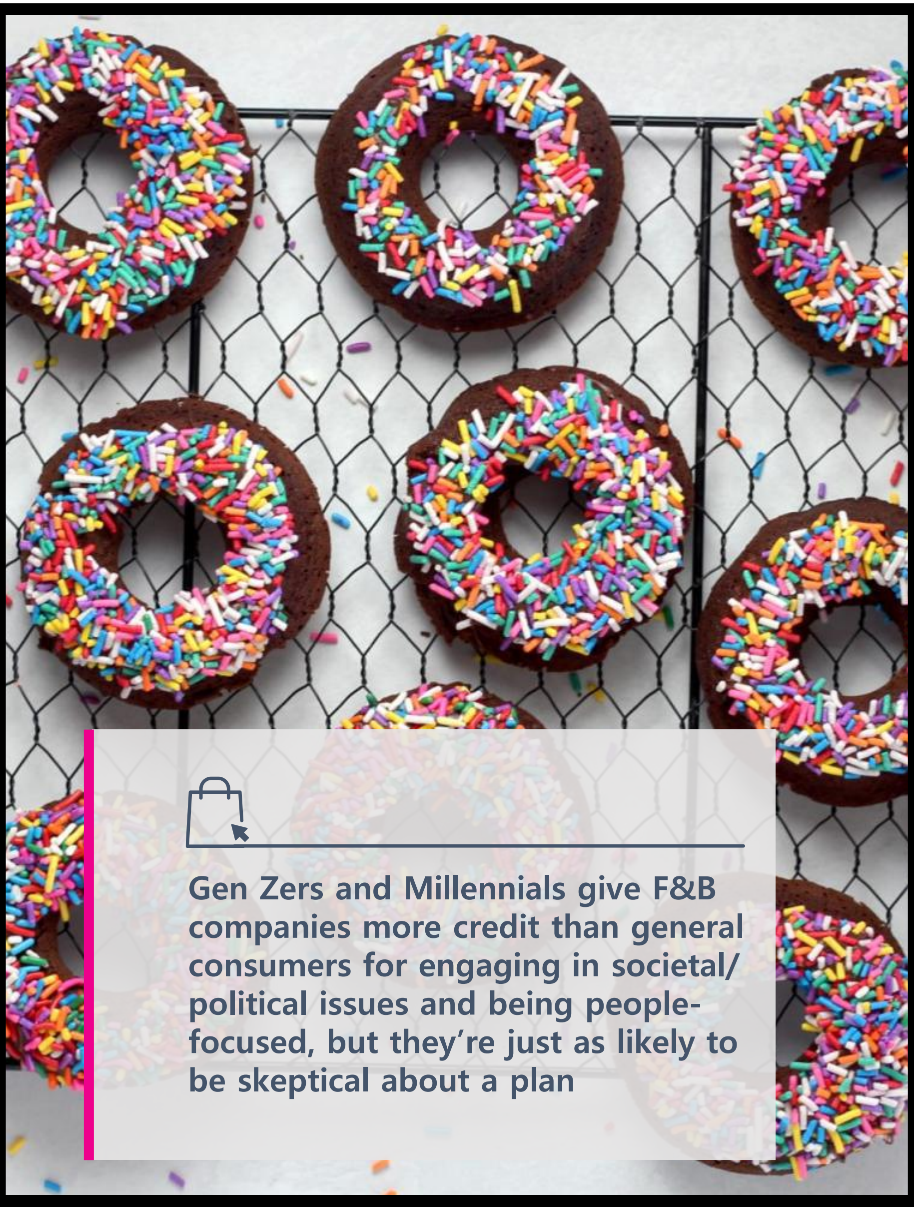
Consumers are relying on brands to help society weather the coronavirus pandemic. **62%** believe countries won't make it through the crisis without brands playing a critical role in addressing challenges, and **over half** of consumers agree that brands are responding more quickly and effectively than governments.

Source: Edelman, *Edelman Trust Barometer: Coronavirus Special Report*, May 2020

Base: Total (13,007) Q5. For each of the following, please rate the extent to which you agree with one side versus the other or if you agree with both equally. Note: 11pt slider scale.

historically, this has been an area where F&B has underperformed

only 1 in 4	agree that F&B companies appropriately engage in societal/political issues
only 1 in 5	agree that F&B companies place people over profits
9 in 10	people aren't confident that the F&B industry has a plan to produce enough food to keep up with growing populations



Gen Zers and Millennials give F&B companies more credit than general consumers for engaging in societal/political issues and being people-focused, but they're just as likely to be skeptical about a plan

Base: Total (13,007) Q13. How well do you think [F&B SECTOR] products are able to deliver on each of the following? Note: 7pt scale where 1=Does not deliver at all & 7=Completely delivers this
Q6. To what extent do you agree or disagree with each of the following statements about the food and beverage industry? Note: 7pt scale where 1=Completely disagree and 7=Completely agree.

this isn't a lofty goal for the future–
this is a call to act in the here and now

AVERAGE RANKING OUT OF 9

What is the Most Important Issue For F&B Companies Specifically to Focus On?

1. **Limiting food waste**	**2.** **Providing food access to all**	**3.** **Prioritizing public health & nutrition**
4. Producing food/beverages sustainably	**5.** Fighting obesity	**6.** Addressing the growing population
7. Prioritizing animal rights/ welfare	**8.** Diversity + inclusion within orgs	**9.** Bringing new and diverse ingredients/flavors to people

Those over 55 are more likely than General Consumers to believe food access is the #1 priority for F&B companies **28%** while Millennials are less likely (17%)

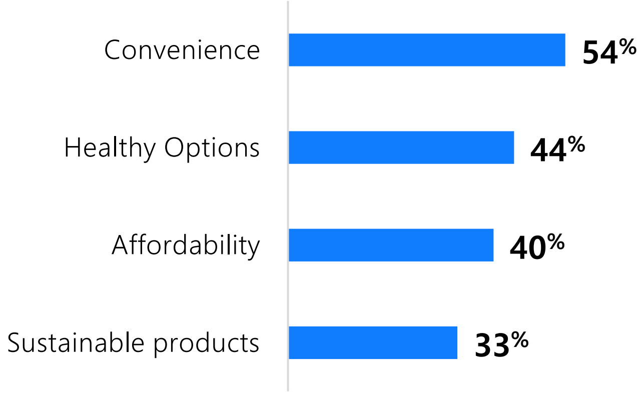
While the top 3 F&B priorities among those under 40 fall in line with General Consumers, they're more likely to place higher importance on organizational D&I and access to diverse flavors

Base: Total (13,007) Q7. Below is a list of issues that companies in the food and beverage industry may need to tackle now and in the future.
Note: Ranking with 1=Most important and 9=Least important

change must be led across all categories

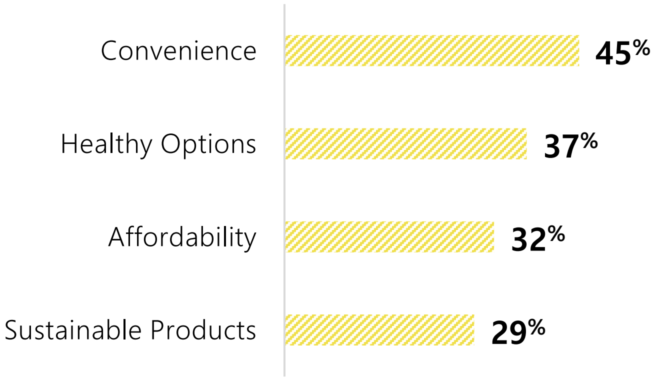
Grocery Satisfies Access Most, But May Still Need More

% Agreeing Grocery Delivers This



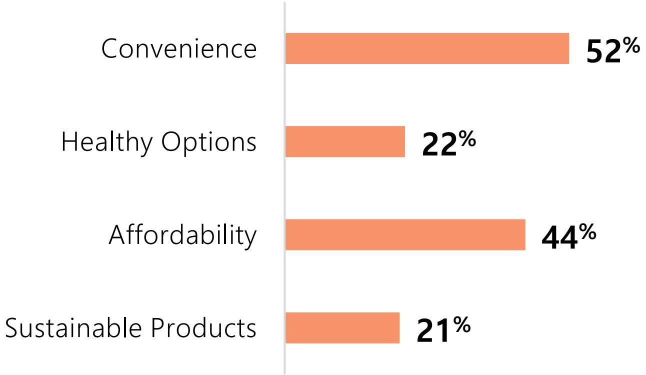
Food Manufacturers Lag on Affordability and Healthy Options

% Agreeing Food Manufacturers Delivers This



Fast Food Lags on Health/Nutrition

% Agreeing Fast Food Delivers This



Millennials have more faith than general consumers in Fast Food's ability to provide healthy options

Base: Total (13,007) Q12. How well do you think [F&B SECTOR] products are able to deliver on each of the following? Note: 7pt scale where 1=Does not deliver at all & 7=Completely delivers this / Q13. How well do you think [F&B SECTOR] products are able to deliver on each of the following? Note: 7pt scale where 1=Does not deliver at all & 7=Completely delivers this

successful brands will find a way for equitable access and premiumization to coexist

All F&B options should be made equally available to all people at low costs

Agree Equally

High-quality F&B should be sold at a premium price

People with post-graduate degrees and those with higher incomes more strongly agree that quality products should be sold at a premium, while those with lower incomes and rural consumers disagree.

Base: Total (13,007) Q5. For each of the following, please rate the extent to which you agree with one side versus the other or if you agree with both equally. Note: 11pt slider scale.

what this means for achieving accessible sustainability

Put Access At The Heart of All Social Good Work

While other topics, like sustainability, are still a very important focus for people globally, food access cannot and should not be forgotten.

Regardless of what else is on the table, brands must still focus on the need for access to good food for all people – whatever their means.

Focus on the Here and Now Rather Than Lofty Promises

People are craving immediate attention to fundamental issues like addressing food waste (especially as it pertains to COVID-19’s impact on agriculture), wealth inequities (especially as it pertains to corporate greed), and helping people be healthier and happier.

Success with consumers is determined by showing progress, not promise.

Invite Your Customers to Be Part of the Solution

As we have consistently seen over the past few years, brands succeed most when they demonstrate partnership.

Knowing there are consumers who are willing to pay more for certain things, effective brands will find ways to engage them in solutions – without putting everything on the consumer’s plate.

food as food vs. food as politics

“”

The food industry is the nexus of almost all of the major forces in our politics today. It’s super closely linked with climate change and ethics. It’s the nexus of minimum wage fights, of immigration law, of criminal justice reform, of health care debates, of education. You’d be hard-pressed to find a political issue that doesn’t have food implications.

Alexandria Ocasio-Cortez,
U.S. Representative

What We Explored:

- Economy vs. Environment
- Liberal vs Conservative
- What this Means for Brands & Business

two issues are important to all consumers across all sectors, other issues are more personal or political

Most Important Issues to Consumers Across All Industries

61%

of people are willing to give up more personal health and location data to combat the spread of COVID-19

Source: *Edelman Trust Barometer: Coronavirus Spring Report*, May 2020

%	Issue
65%	**Data Privacy**
63%	**Public Health and Nutrition**
61%	Environmental Sustainability
55%	Stabilizing/Growing the Economy
54%	Animal Welfare
49%	Public Misinformation
48%	Income Inequality
45%	Diversity and Inclusion
36%	Corporate Greed

Base: Total (13,007) Q2. How important are the following issues to you, personally?
Note: 7pt scale where 1=Not at all important and 7=Extremely important

Outside of the top two, importance of issues does vary by market, though. For most people and most markets, sustainability falls in the top 3.

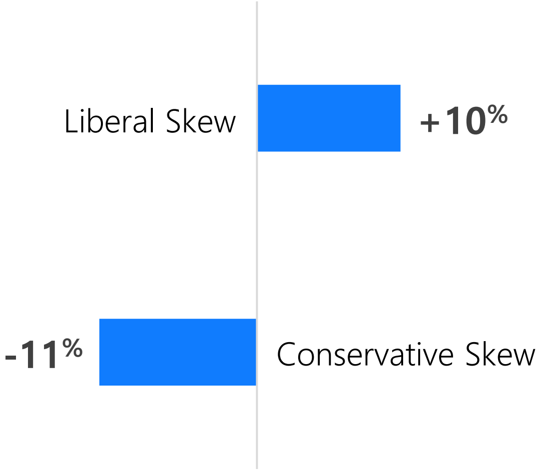
However, in some places – like the US, China, Italy, and South Africa – **we see a stronger emphasis on the economy,**

In Germany and in the Netherlands – **we see a stronger emphasis on animal welfare.**

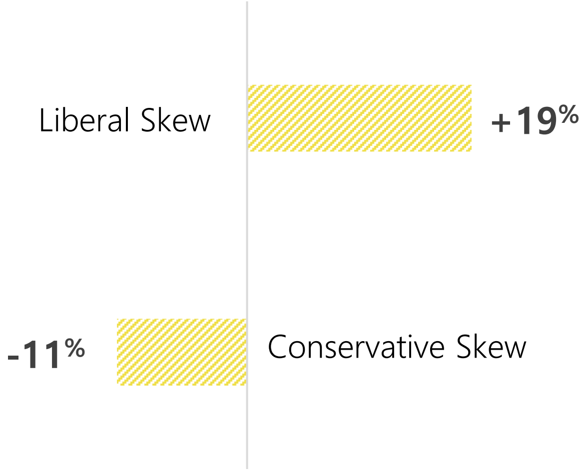
sustainability varies greatly across the political divide

% DIFFERENCE FROM GENERAL CONSUMERS

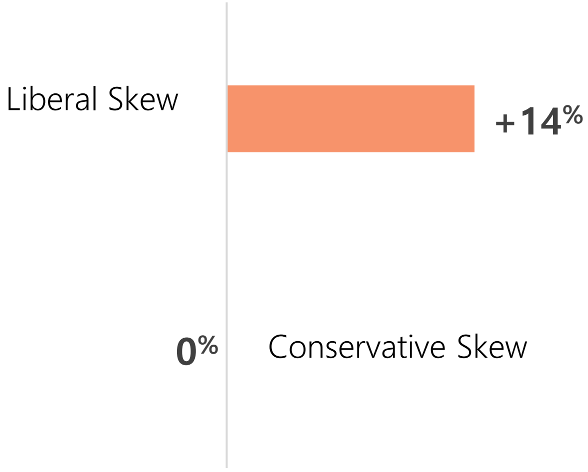
Sustainability is Important For Businesses to Address



Large Scale F&B Production Has Harmed the Environment



I Am Willing to Pay More For Sustainably Produced F&B Options



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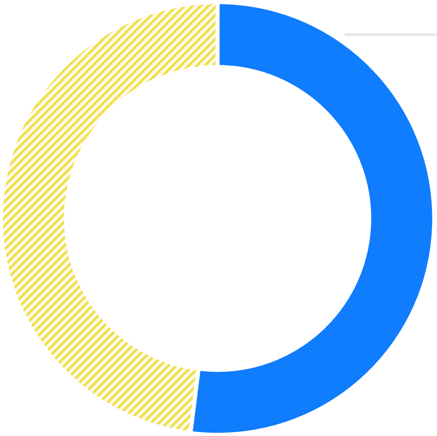
Q2. How important are the following issues to you, personally? Note: 7pt scale where 1=Not at all important and 7=Extremely important / Q6. To what extent do you agree or disagree with each of the following statements about the food and beverage industry? Note: 7pt scale where 1=completely disagree and 7=completely agree. Political swing is self-reported regardless of party affiliation.

we do see key moments in time where the political divide meets and agrees, such as…

Food Waste & Access Are the Most Pressing Issues

For all generations, food access is the most important issue followed by reducing food waste -- except for Millennials where the two issues are tied.

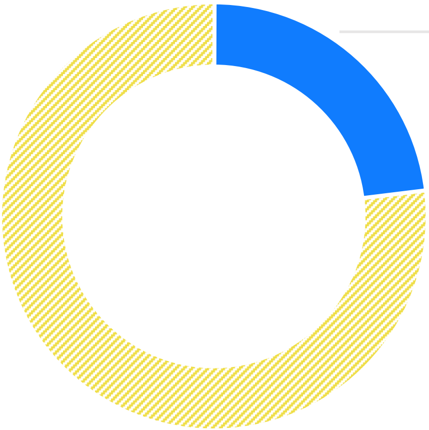


52%

agree that food waste is a top three issue for F&B

Tech is Not the Guaranteed Solution

In fact, only a quarter agree that a heavier reliance on technology could solve for the negative environmental impact of the F&B industry; and people are as likely to believe tech is used well as tech should be banned.



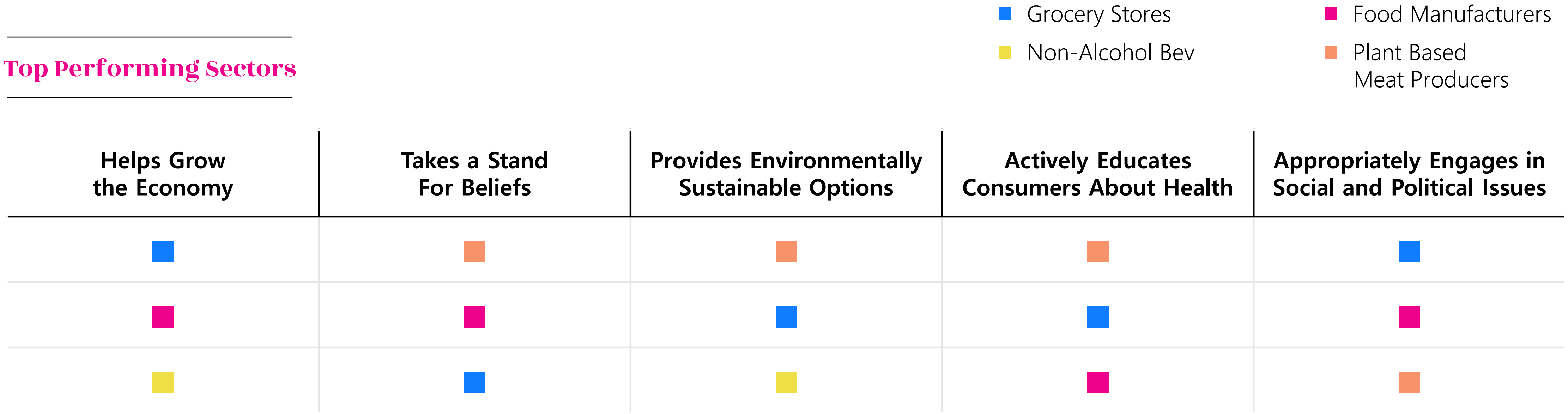
23%

agree that a heavier reliance on technology would solve for negative environmental impact

Base: Total (13,007) Q7. Below is a list of issues that companies in the food and beverage industry may need to tackle now and in the future. Note: 7pt scale where 1=most important and 7=least important. Q6. To what extent do you agree or disagree with each of the following statements about the food and beverage industry? Note: 7pt scale where 1=completely disagree and 7=completely agree.

some sectors engage better than others
with mixed results

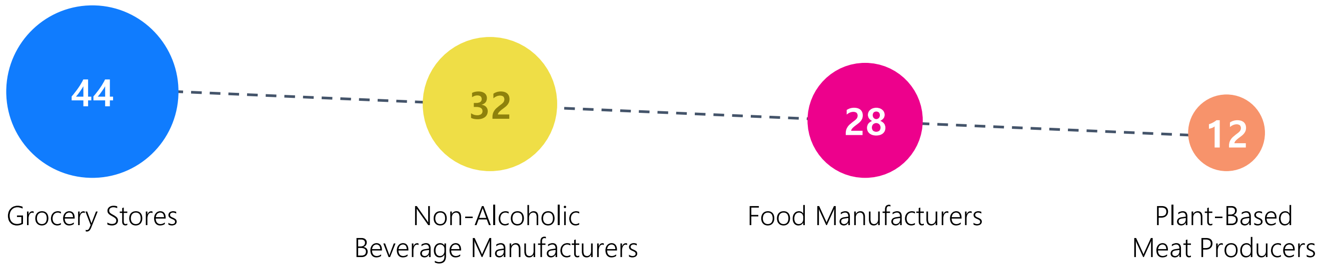
Top Performing Sectors



Edelman Net Trust Score

Advocacy Impact on Trust

Trust in the plant-based category shows that doing well on engaging in societal issues does not always translate immediately to trust.



eat. drink. trust.

Base: Total (13,007) Q3. Please indicate how much you trust the following types of businesses in the food and beverage industry to do what is right. Note: 9pt scale where 1=Do not trust them at all & 9=Trust them a great deal / Q13. How well do you think [F&B SECTOR] products are able to deliver on each of the following? Note: 7pt scale where 1=Does not deliver at all & 7=Completely delivers this

what this means for balancing food and politics

Cross-Pollinate Your Business Strategy

The reasons these tensions are so hard to manage for most are because there are often as many people on one side as another.

Successful brands think outside of the box and use their entire value structure when engaging in the most important topics and disrupt the conversation in non-traditional ways– such as leading with sustainability in your tech story rather than vice versa.

Still Celebrate Food as Food

While people have both functional and emotional relationships with food, taste and familiarity are still the core drivers of purchase and trust. Many people take this so far as to a belief that food should be made as naturally and unprocessed as possible.

Food should be celebrated at the core of everything you do – without overthinking, apologizing, or having to rationalize it.

Collaborate Externally to Grow Your Credibility

In a fight for truth and confidence, people are overwhelmingly turning to experts – with the highest trust placed in healthcare providers, scientists, and nutritionists.

Regardless of your internal brand equity, these voices will always be the strongest at driving believability and resonance in your purpose, your products, and your progress. Bring them into your process, from the start.

plant-based: commitment vs. choice

"My proposal is a green cuisine and I have always said that a green or vegetable centered cuisine is above any gastronomic ideology; it is a personal decision whether someone want to eat animals or not".

Rodrigo de la Calle,
Spanish Micheline star chef, and book author

What We Explored:

- Near Term vs. Long Term
- Planet vs. Palette
- What this Means for Brands & Business

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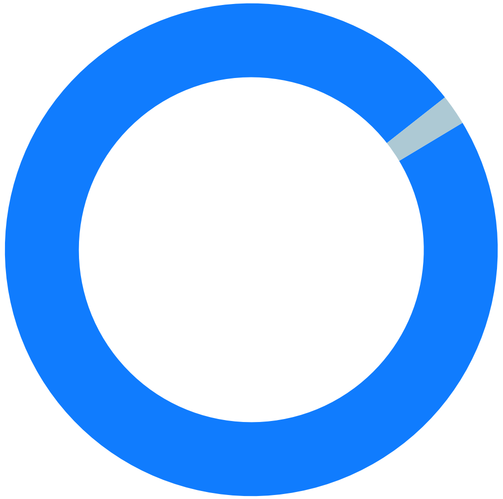
long-term growth among plant-based meat brands may be limited as core consumers lack sufficient trust

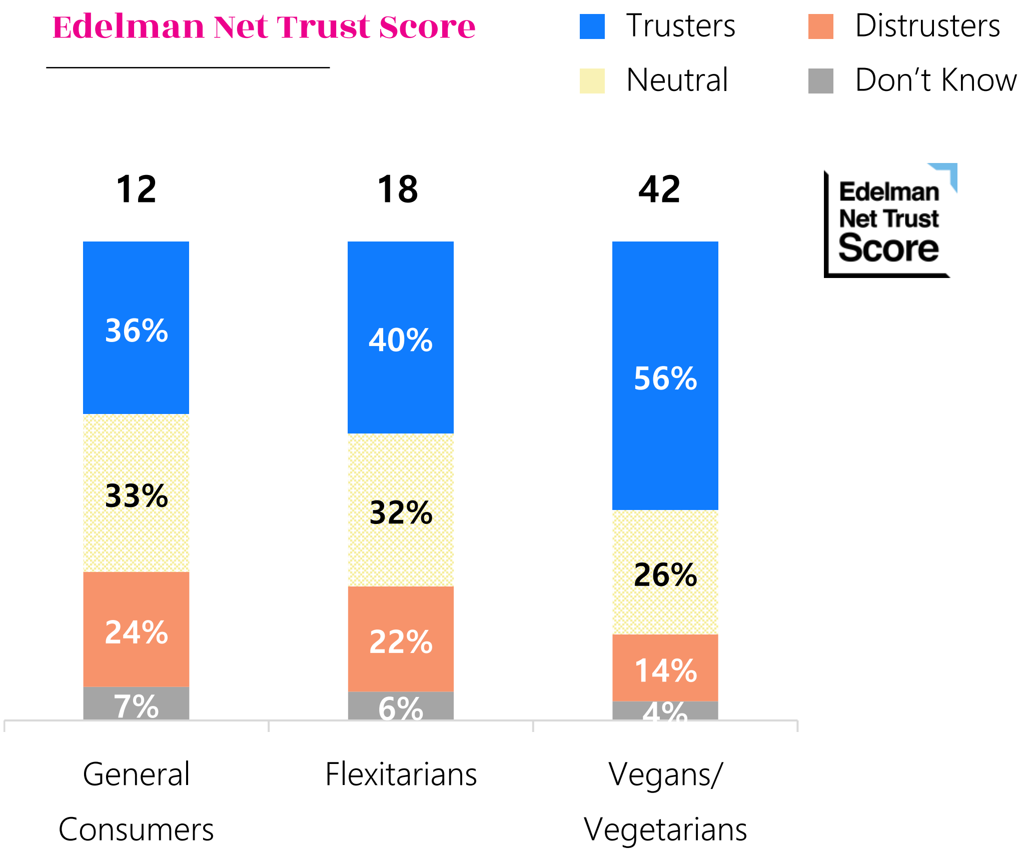
98%



of US meat-alternative buyers also purchase meat

(According to Nielsen panel data, 2019)

Edelman Net Trust Score



eat. drink. trust.

Base: Total (n=13,007) Q3. Please indicate how much you trust the following types of businesses in the food and beverage industry to do what is right.
Note: 9pt scale where 1=Do not trust them at all & 9=Trust them a great deal.

the plant-based meat industry is seen as generally delivering purpose without substance

Strengths of Plant-Based

42%

agree plant-based meat producers embrace a natural way of living

- 43% Healthy Options
- 42% **Embracing a Natural Way of Living**
- 42% Purpose
- 41% Innovation
- 41% Provides Sustainable Products
- 41% Taking a Stand for Beliefs
- 40% Organic/Natural

Weaknesses of Plant-Based

27%

agree plant-based meat producers deliver craveability

- 27% Affordability
- 27% **Craveability**
- 28% Appeal to Family/Friends
- 29% Familiarity/Comfort
- 34% Ability

eat. drink. trust.

Base: Total (13,007) Q9. To what extent do you agree with the following statements in regards to [F&B SECTOR]? Note: 7pt scale where 1=Strongly disagree and 7=Strongly agree Q12. How well do you think [F&B SECTOR] products are able to deliver on each of the following? Note: 7pt scale where 1=Does not deliver at all & 7=Completely delivers this Q13. How well do you think [F&B SECTOR] products are able to deliver on each of the following? Note: 7pt scale where 1=Does not deliver at all & 7=Completely delivers this

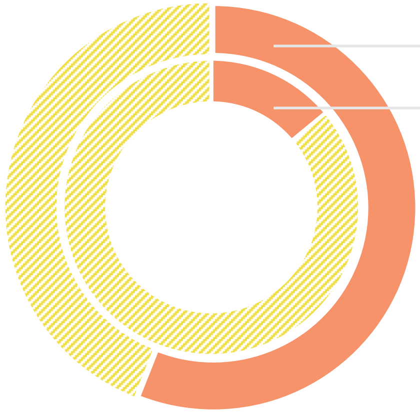
effectively messaging to flexitarians means embracing and supporting who they already are

46% of Global Consumers are Flexitarians

Unlike veganism/vegetarianism which is predominant among younger audiences, flexitarianism is consistent across generations

And, They're Not Casually Flexitarian:

Over Half of them are eating meat-free lunches/dinners at least a few times a week



While **56%** of Flexitarians rank animal welfare as an important issue…

…only **14%** say it's morally wrong to eat animal-based products

59%
believe they should be able to eat whatever they want, including animals

70%
don't believe they have to make changes to their life to stay healthy

62%
are not willing to pay more for healthier options

Base: Total (13,007) Q1. To what extent do you agree or disagree with the following statements? Note: 7pt scale where 1=completely disagree and 7=completely agree / Q2. How important are the following issues to you, personally? Note: 7pt scale where 1=Not at all important and 7=Extremely important / Q5. For each of the following, please rate the extent to which you agree with one side versus the other or if you agree with both equally. Note: 11pt slider scale / Q6. To what extent do you agree or disagree with each of the following statements about the food and beverage industry? Note: 7pt scale where 1=completely disagree and 7=completely agree. / D8. How frequently do you do each of the following activities? Flexitarians are defined as those who eat both meat-free lunches/dinners and eat meat-inclusive meals at least once a week

eat. drink. trust.

what this means for scaling plant-based

THE VEGETARIAN BUTCHER™

Focus On The Fundamentals Required of Food

Plant-based foods have work to do. Beginning by explaining why consumers should care enough to make the change. To do this requires a balance of focus: innovation and higher-level purpose, with more focus on taste, access/affordability, and even occasion.

In other words, help people better understand the basics: the where, when and how to eat, and more importantly to fully enjoy plant-based alternatives.

Embrace Specific Day Parts and Occasions

Fast food has shown and continues to show rising returns for plant-based brands as it has a clear focus on convenience while allowing consumers to make an incrementally "better" choice.

As these consumers don't want to overhaul their lives, brands should seek to focus on when and where plant-based foods should be enjoyed – perhaps in unexpected places.

Increase Attention on Inclusivity

Modern consumers hate being talked down to by brands – especially when it comes to topics like health and sustainability. For plant-based foods in particular, meat consumers may not inherently feel welcome in all brand messaging.

Instead, plant-based brands should invite more people to the conversation by reimagining and disrupting how the category itself is presented.

passion vs. reality

“”

All I ever wanted to do was make food accessible to everyone; to show that you can make mistakes – I do all the time - but it doesn’t matter

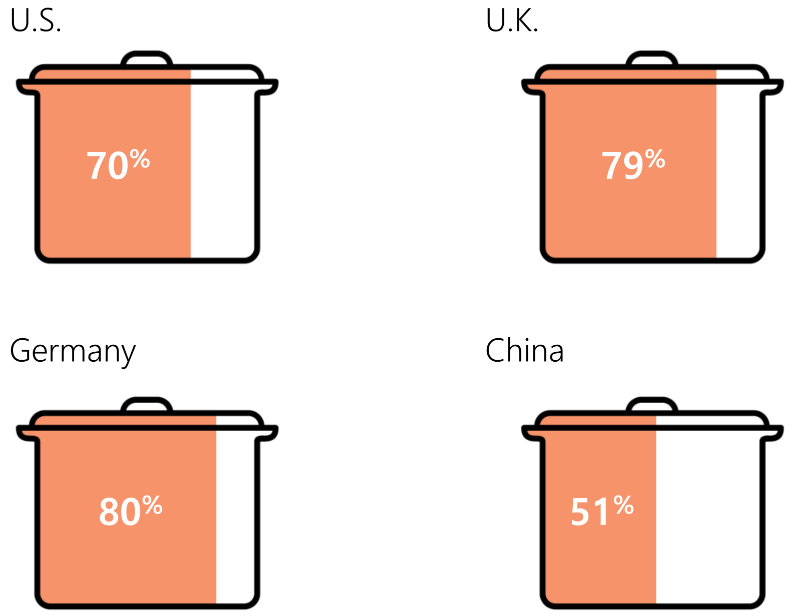
Jamie Oliver,
Chef

What We Explored:

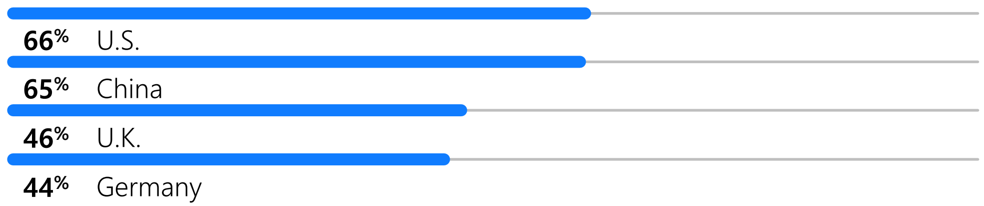
- Cooking in Numbers
- Utility vs. Passion
- Barriers vs. Drivers
- What this Means for Brands & Business

home cooking was already poised for a comeback, social distancing has seemed to accelerate it

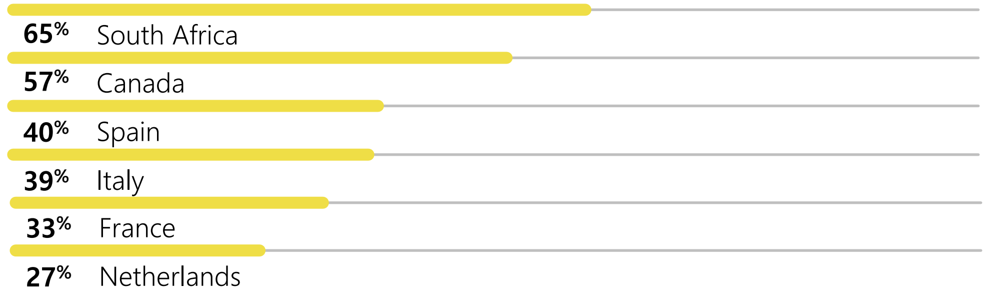
By December 2019, the Majority of Consumers Were Cooking at Home 3+ Per Week*



Since COVID-19, People Are Cooking From Home Even More Frequently:*



And, Many Only Expect to Increase Their Home Cooking In The Future:†

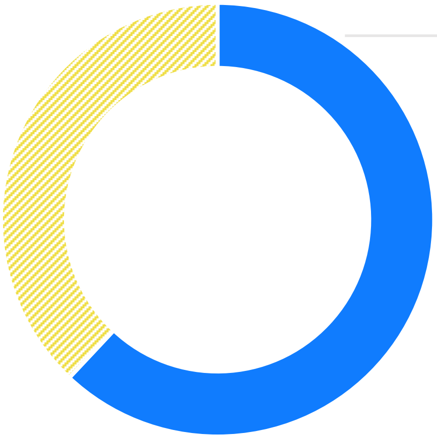


*Source: Statista, December 2019 / May 2020

†Source: McKinsey & Co, Global Consumer Sentiment During the Coronavirus Crisis, May 8, 2020

while much of the motivation to cook at home comes from the functional gains…

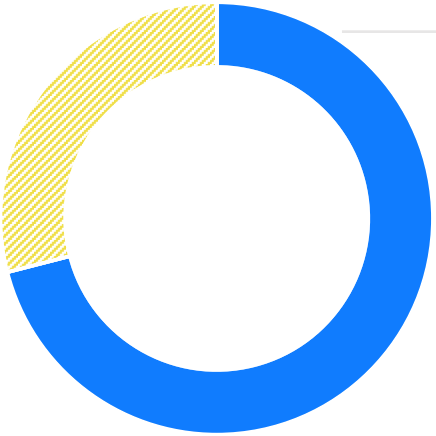
Home Cooking is a Way to Watch the Waist and the Wallet



62%

agree that home cooking is healthier, a 2 to 3x increase compared to fast casual or casual dining

Source: Mintel, *Healthy Dining Trends*, March 2020



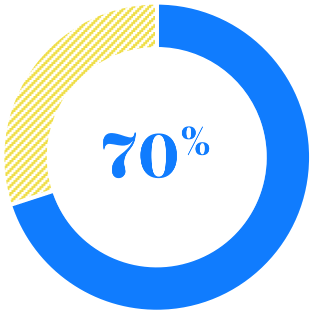
71%

cite saving money as a major reason to cook more from home

Source: Mintel, *Cooking in America*, October 2019

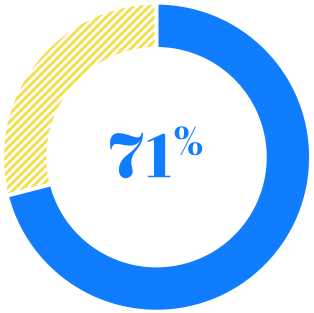
...an increase in home cooking isn't just about health or utility: they are also looking at cooking as an expression of joy

More Than a Job to Be Done



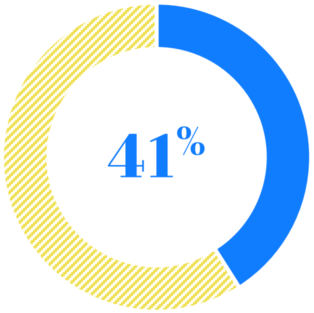
of consumers don't believe cooking is solely functional

For the Love of Cooking



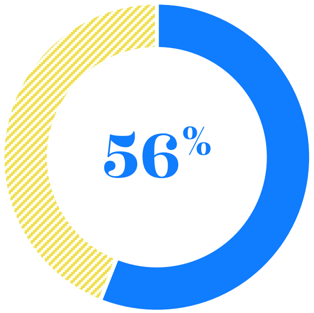
enjoy cooking, and 1-in-5 consider cooking a passion

A Creative Outlet



like being creative in the kitchen

Even Food Shopping Can Bring Joy



like to take their time and browse products while grocery shopping

Base: Total (n=13,007) Q1. To what extent do you agree or disagree with the following statements? Note: 7pt scale where 1=completely disagree and 7=completely agree / Q5. For each of the following, please rate the extent to which you agree with one side versus the other or if you agree with both equally. Note: 11pt slider scale / D2. To what extent do each of the following statements describe your typical grocery shopping habits? / D6. Which of the following best describes how you feel about cooking?

this is consistent across all generations, with the highest passion being found among millennials

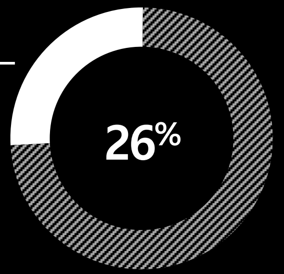
77% Like to Cook

49% Say They Are Knowledgeable About Food

47% Like Being Creative in the Kitchen

46% Believe They Have Good Cooking Abilities

41% Food & Beverages are a Passion

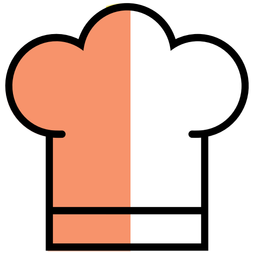


Say Cooking is One of Their **Passions**

Base: Millennials (n=3,446) Q1. To what extent do you agree or disagree with the following statements? Note: 7pt scale where 1=completely disagree and 7=completely agree D4. How knowledgeable are you about nutrition? / D5. How would you rate your cooking abilities? / D6. Which of the following best describes how you feel about cooking?

the most overwhelming barriers to home cooking are the ones that are just “living modern life”

Un-Shared Responsibilities



50%

of **consumers** are the only ones responsible for food prep in their HH

Balancing Work & Family

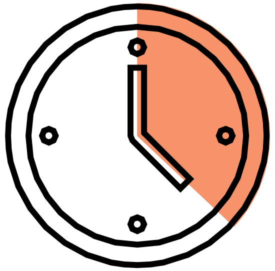
69% Work Full-Time

55% Have Children Under 18

7-in-10

millennials work full-time and over half have kids under 18

Busy Schedules



37%

of **parents** agree their day to day lives can be overwhelmingly busy

Base: Total (n=13,007) Q1. To what extent do you agree or disagree with the following statements? Note: 7pt scale where 1=completely disagree and 7=completely agree.
D3. What is your role in preparing food for your household? / D10. Which of the following best describes your current employment? / D12. Who lives in your household with you?

what this means for unlocking everyday passions

Translate Passion Into Convenience

Convenience tech (like sous vide and pressure cooking) and elevated low-cook options (like microwaving or one-pan meals) dominate the home-cooking reality, even when people are trapped at home.

Brands succeed most with consumers when they allow them to be pampered, surprised, or empowered for minimal to no effort.

Embrace The Curators

People spend less time focused on how to cook, and more time on finding more unique, photo-worthy, and elevated food and beverage options.

Brands should bring to life their history, culture, and personal imagery in a way that consumers can feel a part of – whether that be the best flour or yeast for their homemade sourdough or the farm fresh sandwich they got from the grocery hot bar.

Practice Self-Care

Emotional well-being across the globe has become an increasing priority and people are turning to food for support. As uncertainty remains, people seek out comfort foods, baked goods, as well as simple yet meaningful moments of indulgence.

As such people want brands to provide them release and relief without feeling like they need to completely forfeit their health goals.

small + local vs. big + global

“”

We need to support and enhance local food networks as much as possible […] If a country is heavily reliant on food imports and a storm hits, its farms are hurt and its ports shut down and, the paralyzed food supply puts those populations at great risk.

Amanda Little,
Award-winning journalist, author of *The Fate of Food: What We'll Eat in a Bigger, Hotter, Smarter World*

What We Explored:

- Shop Local X Global
- Small Companies x Big Companies
- What this Means for Brands & Business

eat. drink. trust.

people overall favor #shoplocal – a preference that will most likely continue to grow as we navigate covid-19 impact

44%

agree that people should only buy from F&B companies headquartered in their own country

26%

believe consumers should be encouraged to buy from companies across the planet

(with younger audiences, like Gen Z and Millennials, and liberals being most interested in globalism)

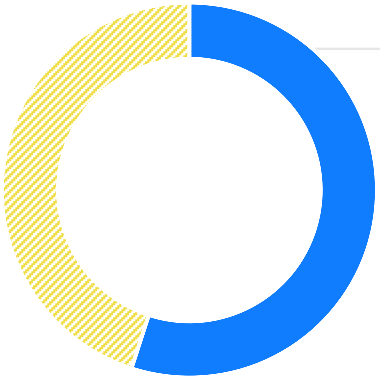
64% of European consumers say they try to buy from local companies whenever possible. With the COVID-19 shutdowns, consumers are likely to re-learn what's available to them locally and become more engaged with local businesses to support their community.

Source: Mintel, COVID-19: The Longer-term Implications for European Consumers, April 2020

Base: Total (n=13,007) Q5. For each of the following, please rate the extent to which you agree with one side versus the other or if you agree with both equally. Note: 11pt slider scale.

preferences toward local or global shopping are more a result of the economy than of personal values

Economic Stability

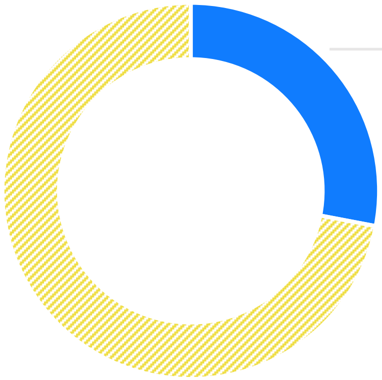


55%

feel that the economy needs to be one of the top two priorities

yet

Price Sensitivity



Only 28%

agree they shop local as much as possible, even if it costs more

and intention isn't always aligned to current behavior

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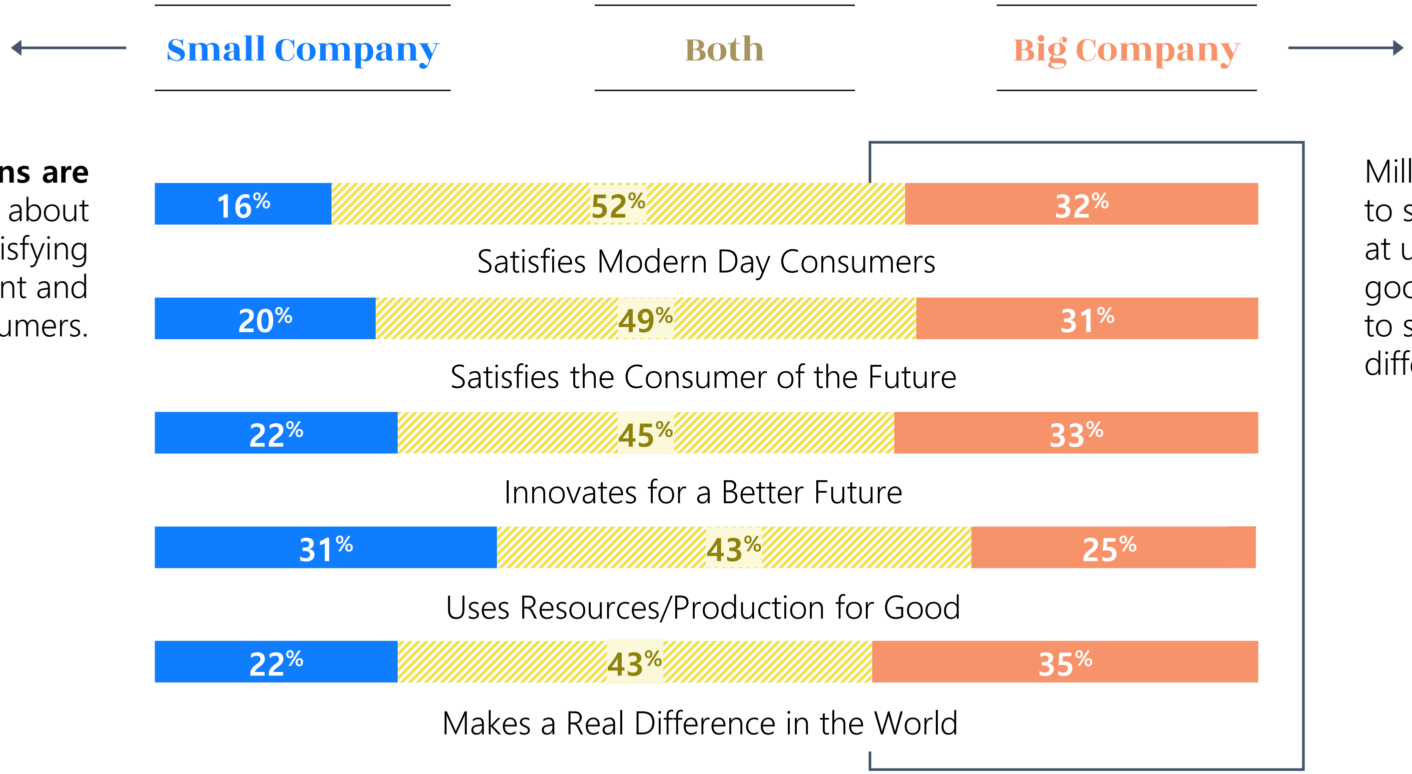
Base: Total (n=13,007) Q1. To what extent do you agree or disagree with the following statements? Note: 7pt scale where 1=completely disagree and 7=completely agree.
Q2. How important are the following issues to you, personally? Note: 7pt scale where 1=not at all important and 7=extremely important

looking to the future of F&B, people see a role for both small and large companies

Older generations are more pessimistic about big companies satisfying the needs of current and future consumers.



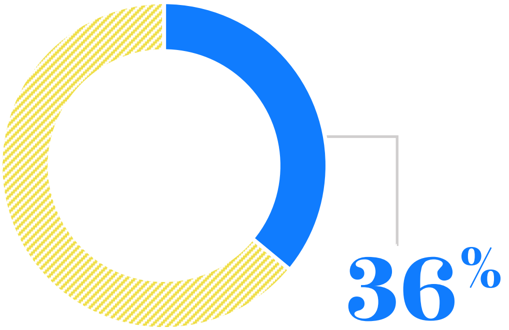
Millennials are **24% more likely** to say big companies are better at using resources/production for good and **29% more likely** to say big companies make a real difference in the world.

eat. drink. trust.

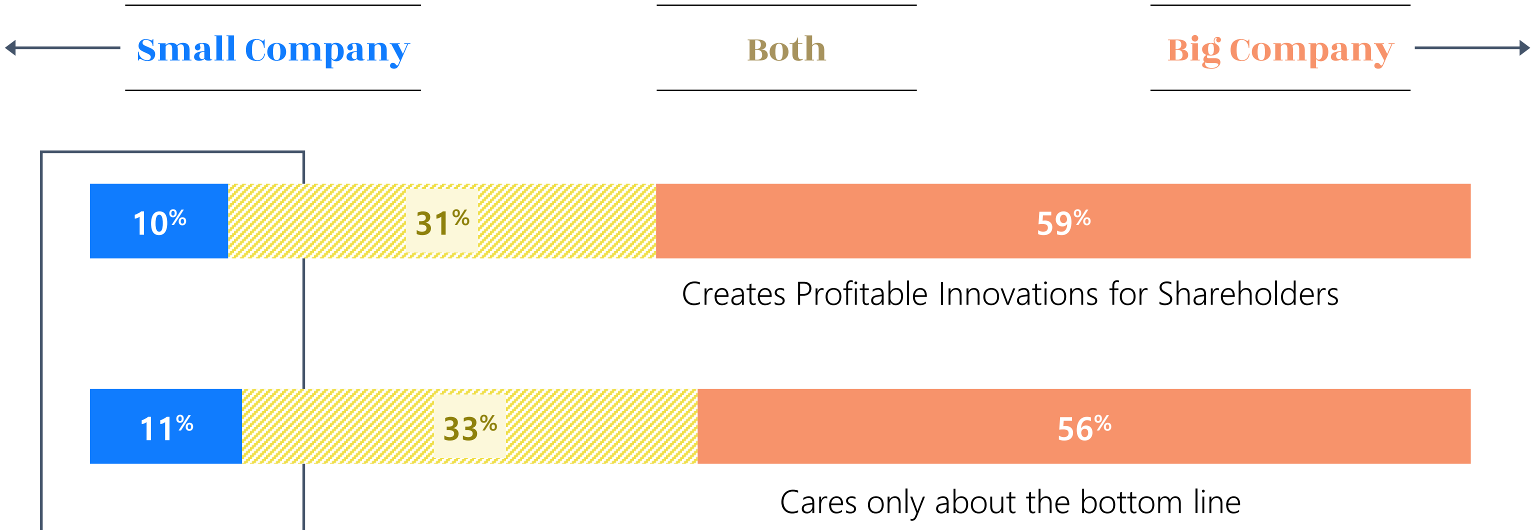
Base: Total (n=13,007) Q4: Please rate the extent to which you think each of the following statements describes a big/well-established food and beverage company or a small/start-up food and beverage company? Note: 7pt slider scale.

as long as concerns about capitalism and perceived greed are addressed – especially pertaining to big companies

Corporate Greed



Believe That Addressing Corporate Greed is a Top Priority



Small business is still a business for Gen Z consumers: they see small companies as more profit-focused compared to general consumers

Base: Total (n=13,007) Q2. How important are the following issues to you, personally? Note: 7pt scale where 1=Not at all important and 7=Extremely important / Q4: Please rate the extent to which you think each of the following statements describes a big/well-established food and beverage company or a small/start-up food and beverage company? Note: 7pt slider scale.

what this means for embracing big AND small

Go Big Or Go Home

Brands engaging on societal issues will need to prove in a meaningful way that they are placing consumers over profits. What this looks like, though, will differ for each company with the larger companies needing larger impact and investment to see any return.

This all means that brands will be under extreme scrutiny when engaging in these issues and must prepare for criticism if accused of "not doing enough" or if authenticity is questioned

Learn (And Use) Your Superpowers

Knowing that both big and small or global and local companies have roles to play for consumers, it is important to remember what you uniquely bring.

For example, large companies can invest in and support small or local markets, small companies can innovate with more agility, global companies can scale positive impact, and local companies can easily engage more directly with consumers.

Demonstrate Partnership Not Competition

Knowing that companies are more often seen as capitalist at the core regardless of size, it is imperative for consumers to see examples of collaboration building towards a common goal.

This could be a partnership between large and local brands or between non-profits and private industry.

digital vs. brick & mortar

“”

Grocery and healthcare were the last bastions of strength against the rise of e-commerce, but the coronavirus just bent the slope of the adoption curve decidedly more upward

Chris Walton,
Expert In Omnichannel Retailing

What We Explored:

- Novice vs. Guru
- Strengths vs. Opportunities
- What this Means for Brands & Business

eat. drink. trust.

even in a “stay at home” world, most choose in-person groceries over online

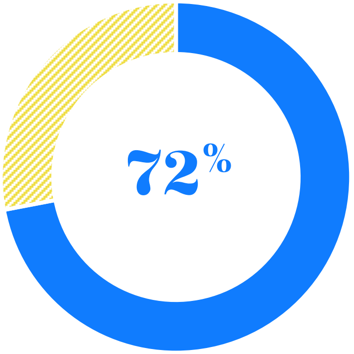
In the past three months, there has been*

a +7pp increase in trust in grocery/ supermarket

no change in trust in digital food delivery services

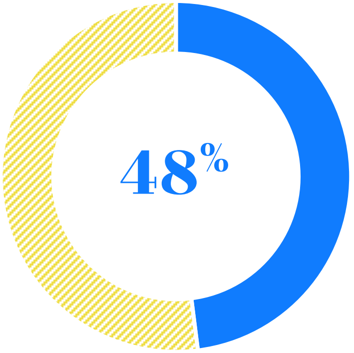
Only a quarter (27%) of US consumers say they’ve purchased groceries online instead of in-person because of COVID-19, compared to half (49%) of Chinese consumers, 26% of UK consumers, and 8% of German consumers.

Source: Statista, *State of Health*, May 3, 2020



US consumers who do all their grocery shopping in store

Source: Mintel, *Cooking in America*, October 2019



Never see themselves exclusively buying groceries online

Base: Total (13,007) Q6. To what extent do you agree or disagree with each of the following statements about the food and beverage industry? Note: 7pt scale where 1=Completely disagree and 7=Completely agree. / D2. To what extent do each of the following statements describe your typical grocery shopping habits?
*Source: 2020 Edelman Trust Barometer Spring Update, May 2020

only a third of people have integrated tech fully into their lives

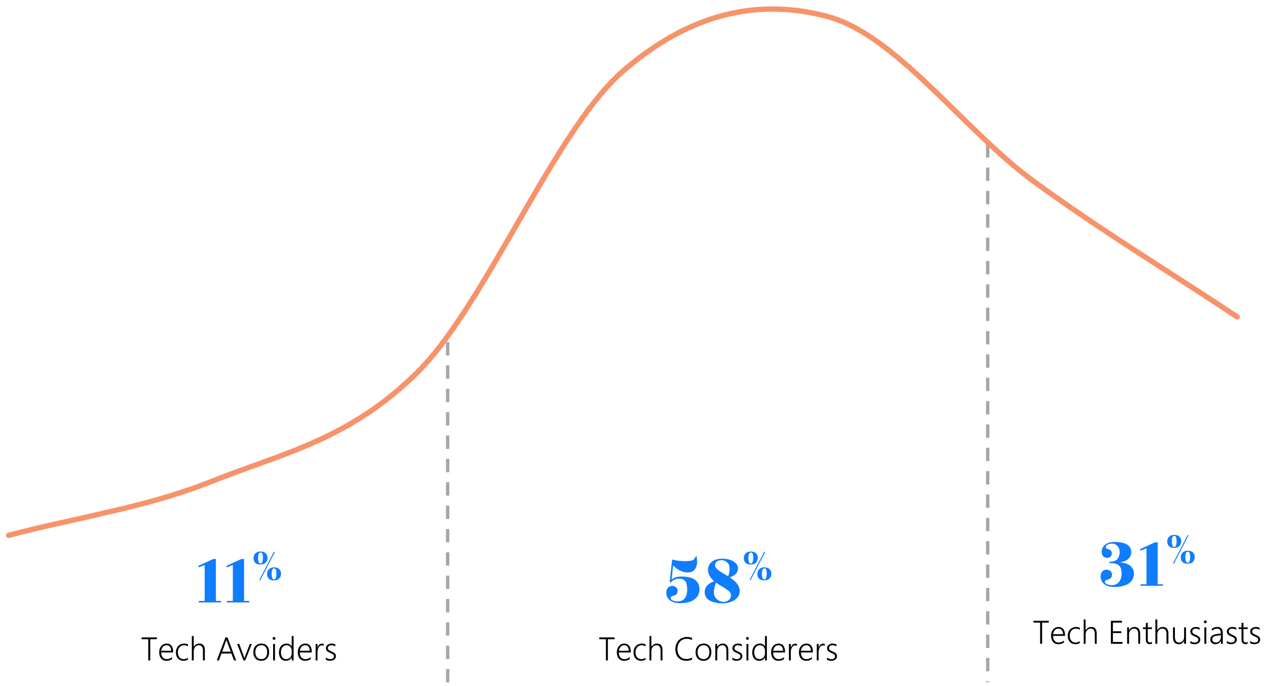
Technology Integration Breakdown

More likely female, suburban/rural, and lower income

More functional and reluctant relationship with food

Watches live TV and reads print media

More apolitical or undecided



More likely male, higher income, and urban

Enjoys browsing for options + highly informed

More likely to have food restrictions

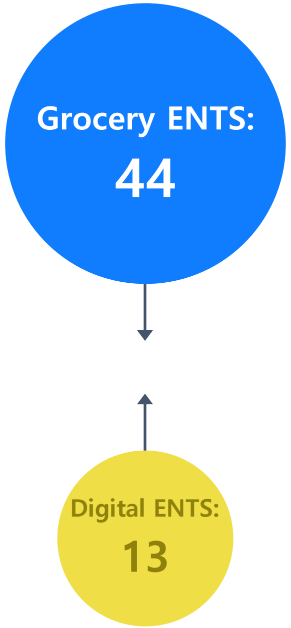
Exercises regularly and takes supplements

Base: Total (n=13,007) Q1. To what extent do you agree or disagree with the following statements? Note: 7pt scale where 1=completely disagree and 7=completely agree.

digital shopping may be able to close the gap by filling in where grocery lacks

What happens when you merge one of the **most trusted categories** with one of the **least trusted**?

Edelman Net Trust Score



Strengths of Grocery, Threats to Digital

While people are drawn to grocery because of the familiarity and access to new and exciting food options – **digital has an opportunity to show a forward vision or lead more with values**

Weakness of Grocery, Opportunities for Digital

eat. drink. trust.

Base: Total (13,007) Q3. Please indicate how much you trust the following types of businesses in the food and beverage industry to do what is right. Note: 9pt scale where 1=Do not trust them at all & 9=Trust them a great deal / Q11. How easily can you think of specific examples of [F&B SECTOR] that fit the descriptions below? Note: 7pt scale where 1=Can't think of any examples and 7=Can easily think of many examples

what this means for navigating this retail convergence

Proudly Borrow Equity and Trust

As digital grocery is still a fairly new (and uncertain) concept for many, brands need to focus on clearly defining what is the core reason to believe in their value proposition.

Successful brands in this space have done this by borrowing resonance, building from competencies in other areas, and/or better integrating into the day-to-day lives of consumers outside of just shopping behaviors.

Take Smaller Steps Toward Digital Integration

As so much of grocery's strengths are in comfort and competence, consumers aren't ready to wholly adopt new behaviors yet.

Brands succeed most when making incremental changes either by extending an existing digital offer or creating entry-level digital options for skeptical or hesitant consumers.

Build Appetite Through Societal Impact and Engagement

Digital grocery and food delivery has an opportunity to fill the gaps grocery and supermarket have left behind – specifically within educating consumers about the food supply process, standing up for affordable sustainability, and engaging on societal and political issues.

4. where do we go from here: what can companies do to build trust?

determining priorities for each category…

Plant-Based Meat Producers deliver purpose without ability leaving most consumers without a reason to believe that there's anything there besides trendiness.

Fast Food can no longer rely on cost and convenience driving purchase as consumers begin looking for more inspiration.

Non-Alcoholic Beverages hold the primary opportunities for values-based messaging to continue to deliver on the individual relationships with consumers

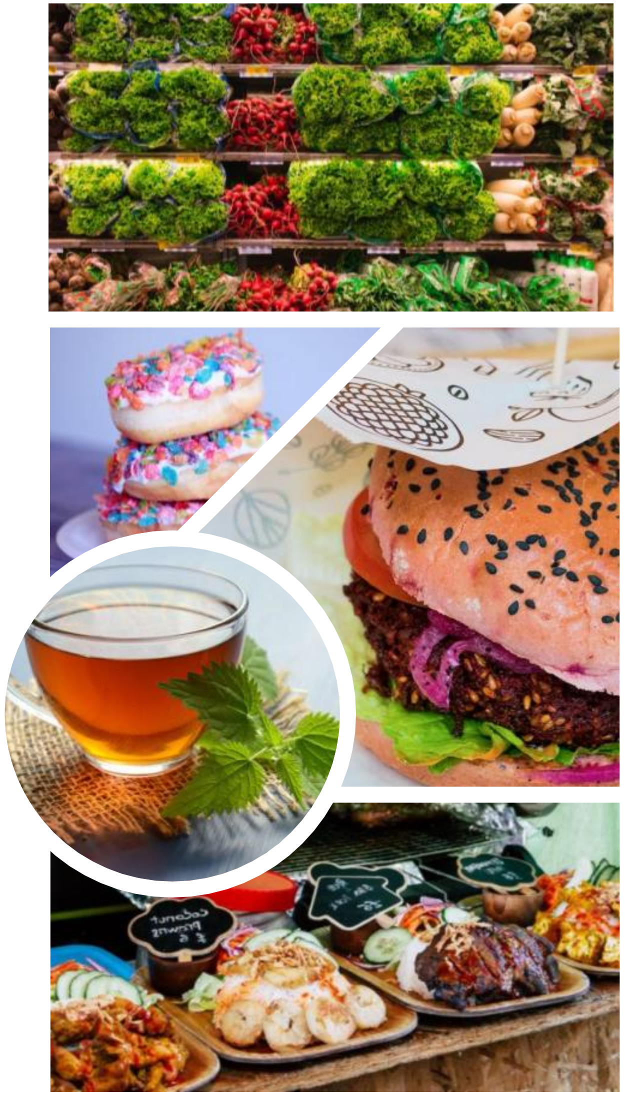
Grocery/Supermarkets need to look to reimagining or disrupting the brand experience to remain relevant and maintain trust

Food Manufacturers establish the voice of the industry by providing taste, variety, and convenience – but consumers now want to lead that voice, not follow

COMPETENCE ▶

Alcoholic Beverages polarize consumers between drinkers vs. drink-free, men vs. women – needing to defend their long-term role in society

ETHICS ▶



to put our recipe into action, we looked at the key categories across Food & Beverage through four specific lenses:

1. What **brand archetypes** create the strongest foundation for brands?
2. What functional and aspirational **proof points** are most effective in building trust for each?
3. How far away is each category from being able to **translate trust into action**?
4. What **external influences** have the biggest impact on consumer relationships with different categories?

A strong brand foundation & identity

Supported by relevant proof points from functional to aspirational

Ability | **Integrity** | **Dependability** | **Purpose**

Consistent action, commitment & transparency across stakeholders and supply chain

Trust starts to take shape and deepen across internal and external audiences

Constant adapting and adjusting based on external influences

food manufacturers

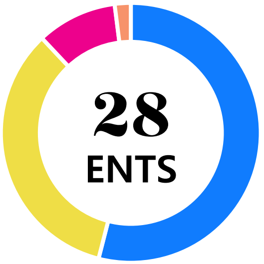
as the leading voice of the industry, food manufacturers are currently looked to for foundational needs (taste, variety, convenience) that ultimately need to give way to deeper, more meaningful relationships with consumers

D **Disrupting the Conversation:** While comfort still drives strong trust with consumers, people are starting to feel like nostalgia is becoming oversaturated. Instead, they are looking for brands that help them express their individuality or let them co-create the user/brand experience.

P **Proving your Role:** People are looking most for brands that prioritize quality, access, transparency, and responsible business leadership, whereas things like organic and local are more indirect drivers of trust.

E **Engaging your Audience:** By and large, parents and younger consumers are the most naturally drawn to food manufacturer brands and often are looking to them for information about food production and their role in driving key societal issues.

food manufacturers



39% Ability

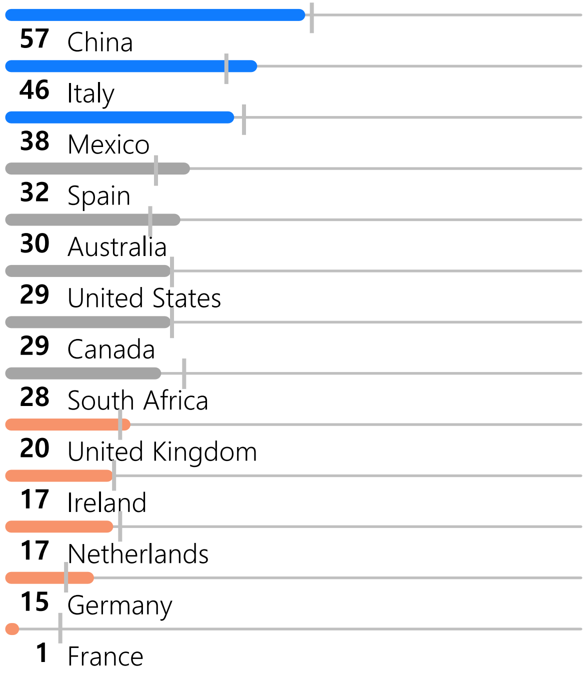
27% Integrity

27% Dependability

34% Purpose

Edelman Net Trust Score

Edelman Net Trust Scores



Overindex to Food Manufacturers global ENTS (120+)

Underindex to Food Manufacturers global ENTS (≤80)

Country-specific ENTS for Total F&B

eat. drink. trust.

People most trust food brands that have a **foundation or identity** built on...

Comfort

Inspiration

Co-Creation

Grey indicates that identity is oversaturated in the market.

...which can be demonstrated through meaningful **proof points** such as...

Table Stakes:
- Variety
- Taste
- Convenience
- Familiarity
- Products that make people happy

Indirect Drivers:
- Simple/clean ingredients
- Organic/natural
- Locally-sourced
- Appropriate risk taking

Differentiators:
- Access to product info
- Stands behind products
- Healthy options
- Proactively solves problems
- Responsible employer
- Best products
- Addresses complaints

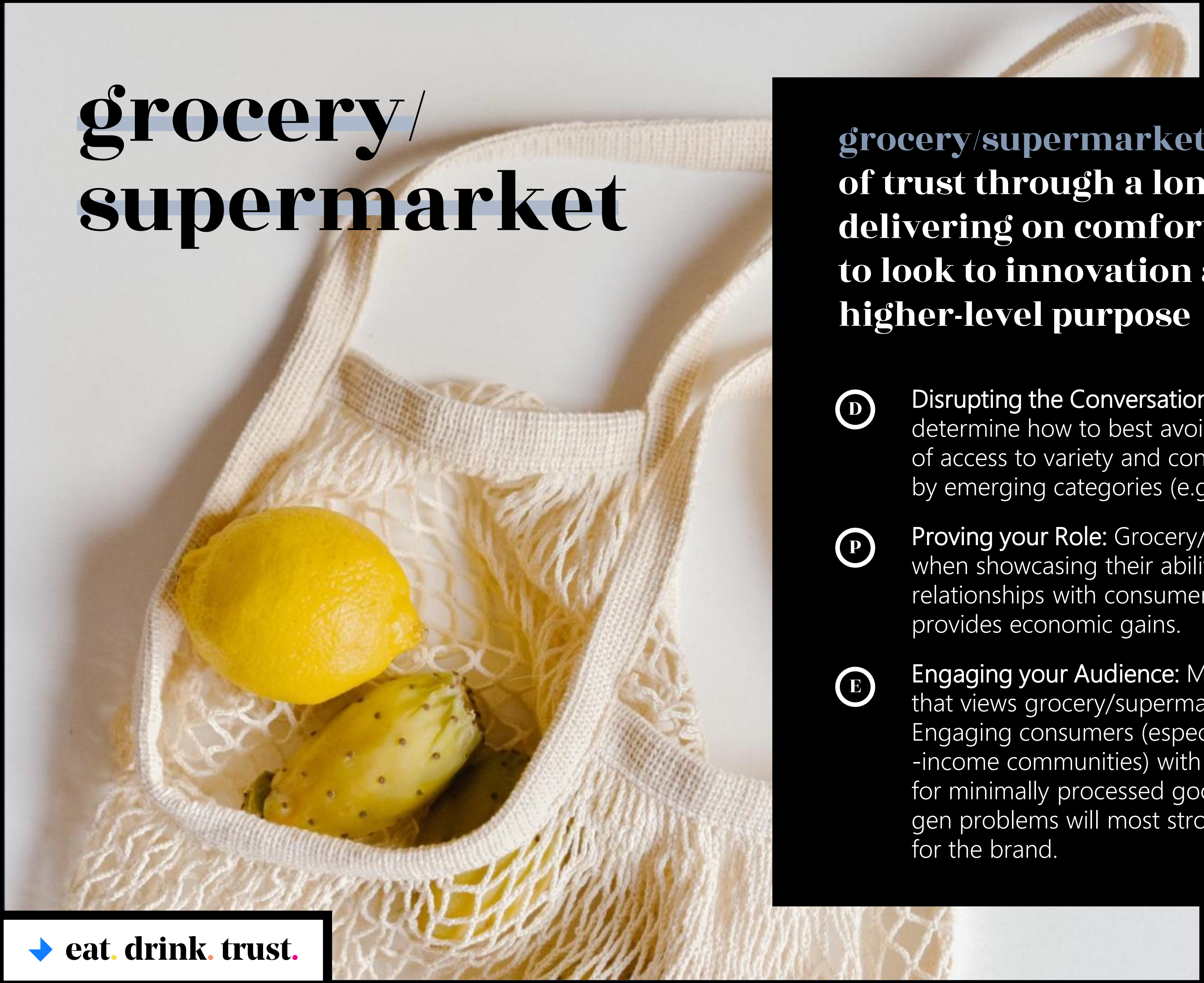
...and acknowledges some of these core **external influences**

Quality food is considered a right, not a privilege

Brands are being pushed to listen more, talk less

Constant novelty is challenging the familiar

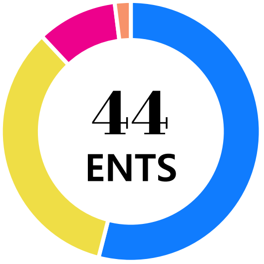
grocery/ supermarket



grocery/supermarket brands drive the highest levels of trust through a long and repeated history of delivering on comfort and convenience – but need to look to innovation and future-proofing as their higher-level purpose

- **D** — Disrupting the Conversation: Grocery/Supermarket brands must determine how to best avoid irrelevance as their core competencies of access to variety and convenient user experience are threatened by emerging categories (e.g., e-commerce, digital delivery)
- **P** — Proving your Role: Grocery/Supermarket brands most succeed when showcasing their ability to have direct and personal relationships with consumers and communities – especially if that provides economic gains.
- **E** — Engaging your Audience: Millennials may be the last generation that views grocery/supermarket brands as withstanding the future. Engaging consumers (especially those who are younger or in lower -income communities) with access to more timely products, options for minimally processed goods, and innovative solutions for next gen problems will most strongly build integrity and dependability for the brand.

grocery/supermarkets



- 48% Ability
- 36% Integrity
- 37% Dependability
- 40% Purpose

Edelman Net Trust Scores

62	China
53	Mexico
53	Italy
51	United States
50	Spain
48	Canada
46	South Africa
39	Netherlands
38	Ireland
37	Australia
34	Germany
33	United Kingdom
22	France

- Overindex to Grocery/Supermarkets global ENTS (120+)
- Underindex to Grocery/Supermarkets global ENTS (≤80)
- Country-specific ENTS for Total F&B

Edelman Net Trust Score

eat. drink. trust.

People most trust grocery/supermarkets that have a **foundation or identity** built on…

Comfort

Competence

Grey indicates that identity is oversaturated in the market. Seeing as all impactful identities are oversaturated, Grocery should look to create and defend new and disruptive identities.

…which can be demonstrated through meaningful **proof points** such as…

Table Stakes:
- Familiarity
- Stands behind products
- Treats customers fairly
- Healthy options
- Taste
- Grows economy
- Appeals to friends/family
- Convenient
- Wide array of products

Differentiators:
- Respects local communities
- Supplier ethics
- Addresses consumer concerns
- Provides best products

Indirect Drivers:
- Takes a stand
- Educates consumers
- Proactively solves problems
- Responsible employer
- Takes appropriate risks
- Innovation

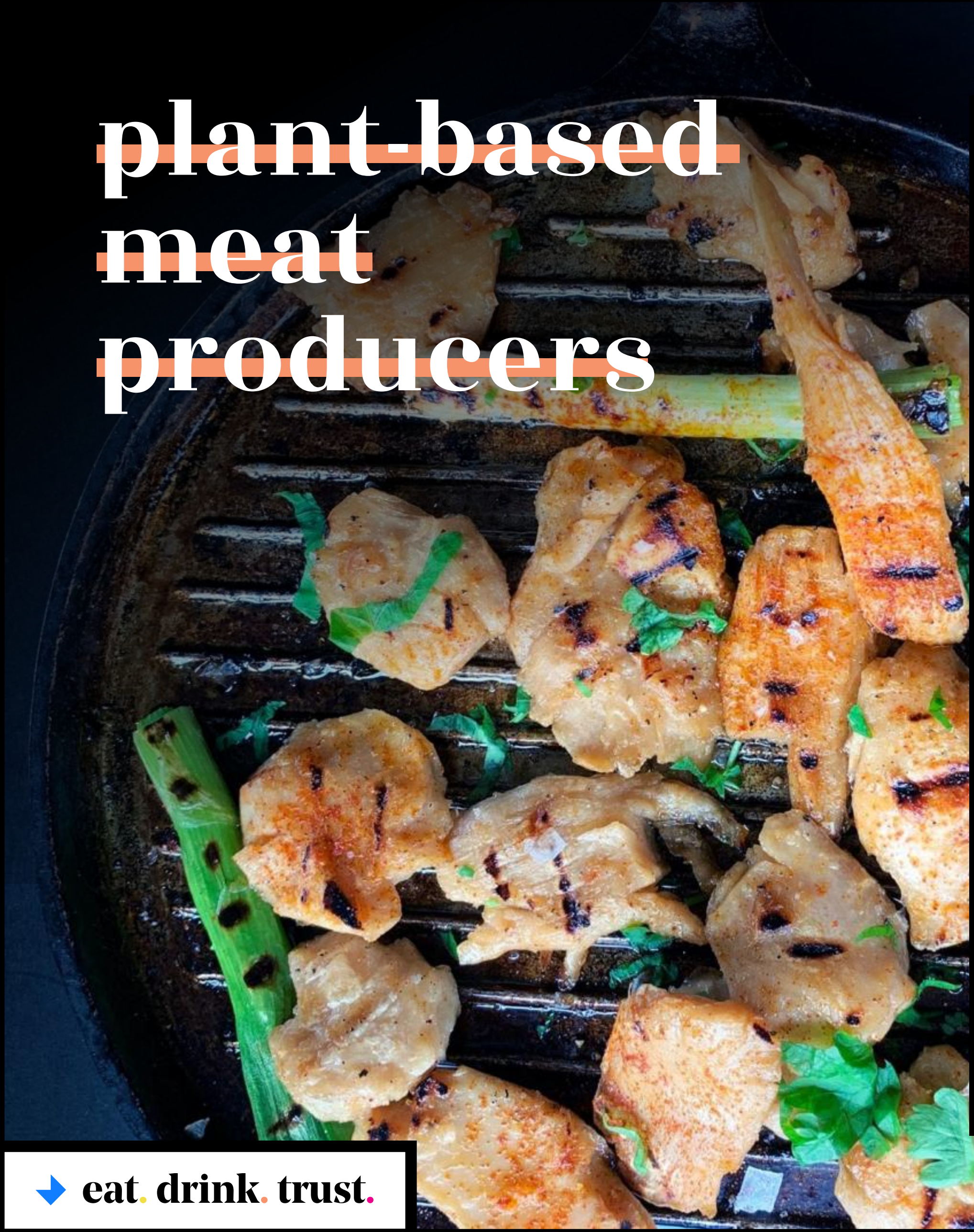
…and acknowledges some of these core **external influences**

Culture has outpaced the status quo

Digital won't win alone, must show integration

National or local community engagement is key

plant-based meat producers



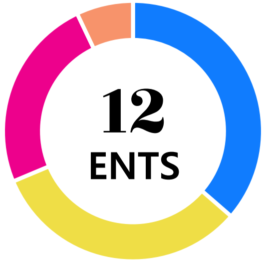
plant-based meat producers currently deliver purpose without substance (with ability scores 27% below average) – resulting in an industry that is mostly whitespace

D — Disrupting the Conversation: Addressing the flexitarians who are not necessarily *wanting* to stop (or even cut back on) animal-based foods will be the first key to winning over consumers. Plant-based brands should ground themselves into how they can naturally fit into people's lives rather than asking consumers to change their lives to fit in plant-based products.

P — Proving your Role: Taste remains the key obstacle for plant-based meat producers – with consumers needing more assurance they will like the products. After that, admitting faults and speaking more candidly to consumers will bridge between the missing functional proof points and the existing strengths with purpose-led messaging.

E — Engaging your Audience: Millennials are the current leaders in trust for plant-based brands as they are determining their new identities in the next phase of their lives– with particular interest in the category as something for their kids. Older generations and single households, on the other hand, generally see the industry as trendiness without usefulness.

plant-based meat producers



29% Ability

25% Integrity

25% Dependability

36% Purpose

Edelman Net Trust Scores

50	China
26	Mexico
18	United States
16	South Africa
14	United Kingdom
11	Spain
10	Netherlands
8	Ireland
8	Italy
5	Australia
3	Canada
-6	France
-6	Germany

Overindex to Plant-based Meat Producers global ENTS (120+)

Underindex to Plant-based Meat Producers global ENTS (≤80)

Country-specific ENTS for Total F&B

Edelman Net Trust Score

eat. drink. trust.

People most trust plant-based meat producers that have a **foundation or identity** built on…

Withstanding

Values-Based

Grey indicates that identity is oversaturated in the market.

…which can be demonstrated through meaningful **proof points** such as…

Table Stakes:
- Takes a stand
- Sustainability
- Healthy options
- Trendiness
- Organic/Natural

Indirect Drivers:
- Access to information
- Versatility
- Taste
- Places people over profits

Differentiators:
- Addresses consumer complaints
- Admits fault honestly

…and acknowledges some of these core **external influences**

Adapting to Flexitarian behaviors is key to success

Health drives the category more than animal rights

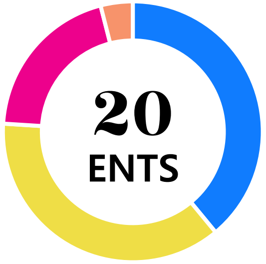
Meat shortages may change the narrative

alcoholic beverages

alcoholic beverage brands are fairly polarizing with most people starting to question the relevance and purpose of these brands in society moving forward

- **D** — Disrupting the Conversation: By and large, people agree that the Alcohol sector delivers tasty, exciting, and innovative products that make people happy – but they are wondering if the companies are truly ethical and responsible. As people continue to look for comfort, alcohol brands will have to make sure to prove they can balance health and comfort.
- **P** — Proving your Role: While happiness and taste have to remain at the front and center of the brand identity, alcohol manufacturers have to help show a future where the companies are led by individuals who care and provide products that are healthier, more societally responsible, and is something different that what people have grown to expect.
- **E** — Engaging your Audience: Millennial men drive the category, followed by Gen Z + Boomer men– as they are familiar with the products and thus they have become routine. Women (especially younger and older women) are the least engaged with the alcoholic beverage category-- potentially as a result of too much processing, lack of healthy options, or just general irrelevance.

alcoholic beverages



42% Ability

26% Integrity

29% Dependability

26% Purpose

Edelman Net Trust Score

eat. drink. trust.

Edelman Net Trust Scores

55	China
28	Canada
23	Mexico
23	South Africa
23	Italy
21	Australia
19	United States
18	United Kingdom
13	Spain
10	Germany
9	Ireland
9	Netherlands
4	France

Overindex to Alcoholic Beverages global ENTS (120+)

Underindex to Alcoholic Beverages global ENTS (≤80)

Country-specific ENTS for Total F&B

People most trust alcoholic beverage brands that have a **foundation or identity** built on...

Comfort

Withstanding

Competence

Individuality

Grey indicates that identity is oversaturated in the market.

...which can be demonstrated through meaningful **proof points** such as...

Table Stakes:
- Taste
- Grows economy
- Makes people happy
- Use of tech
- Innovates
- Stands behind products
- Embraces new + exciting
- Understand customers
- Provides best products

Differentiators:
- Supplier ethics
- Proactively solves problems

Indirect Drivers:
- Responsible employer
- Educates consumers

...and acknowledges some of these core **external influences**

People want comfort, while still prioritizing health

Shrinking interest in craft and premium

Zero-alcohol continues to drive consideration

non-alcoholic beverages

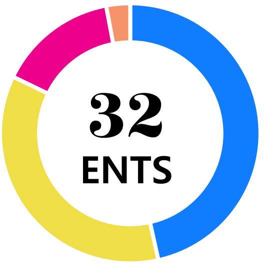
non-alcoholic beverage brands hold the primary opportunities for values-based messaging to continue to deliver on the individual relationships with consumers

- **D** Disrupting the Conversation: Non-alcoholic beverage brands have the least "corporate baggage" holding them back among all food categories as consumers are generally willing to accept a great variety of different types of brand identities, giving these brands the most liberty to push the envelope on activating against taste/lifestyle trends.

- **P** Proving your Role: Despite high performance, there are still areas where non-alcoholic beverages can drive more trust – especially as it pertains to providing more affordable healthy options, engaging with customers more as individuals, and helping them create a more meaningful sense of identity.

- **E** Engaging Your Audience: Non-alcoholic beverage manufacturers have the most to gain across all demographic audiences for purpose and identity based branding – whether that be prioritizing access for underserved communities or targeting those who are willing to pay a premium for more unique or socially-conscious brands.

non-alcoholic beverages



44% Ability

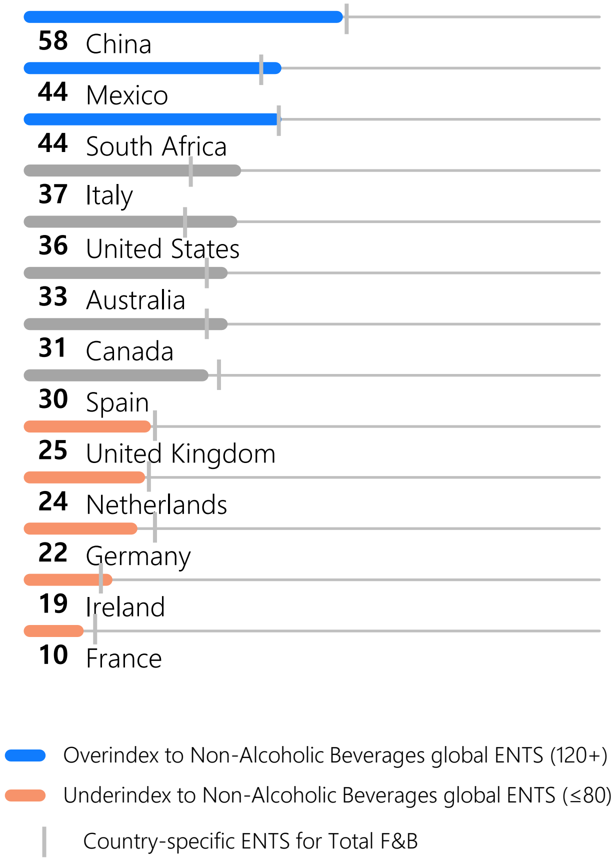
30% Integrity

33% Dependability

35% Purpose

Edelman Net Trust Score

Edelman Net Trust Scores



eat. drink. trust.

People most trust non-alcoholic beverage brands that have a foundation or identity built on…

- Comfort
- Novelty
- Withstanding
- Values-Based
- Competence
- Individuality

Grey indicates that identity is oversaturated in the market.

…which can be demonstrated through meaningful **proof points** such as…

Table Stakes:
- Taste
- Stands behind products
- Grows economy
- Makes people happy
- Convenience
- Familiarity
- Variety
- Understands customers

Differentiators:
- Treats people fairly
- Best products
- Simple/clean ingredients
- Addresses consumer complaints

Indirect Drivers:
- Affordability
- Uses tech

…and acknowledges some of these core **external influences**

Fortification + benefit drives brand trial

People look for unexpected and descriptive flavors

People embrace beverages that embrace individuals

fast food

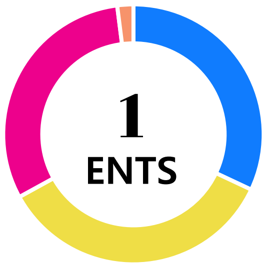
as the least trusted F&B category, fast food can no longer rely on cost and convenience driving purchase as consumers begin looking for more inspiration

D **Disrupting the Conversation:** Consumers by and large are looking for Fast Food to allow them to create their experience, connect them to family and friends, or inspire them to be the person that they want to be – especially if that comes with increased transparency, access to better/healthier food for all people, and the ability for consumers to do the other things they want/need to in life

P **Proving your Role:** As we look toward a potential future of economic downturn, fast mood must acknowledge that cost is no longer the core driver for purchase– especially seeing lower income consumers are 39% less likely to consider the category affordable. Instead, Fast Food should focus on helping improve the lives of individual communities/ nations, their economic security, and their overall well-being.

E **Engaging your Audience:** Fast Food drives highest trust with consumers when address competence– whether that be helping working parents get back to their day-to-day lives or helping older, more functional eaters find tasty or healthy options without having to think about it.

fast food



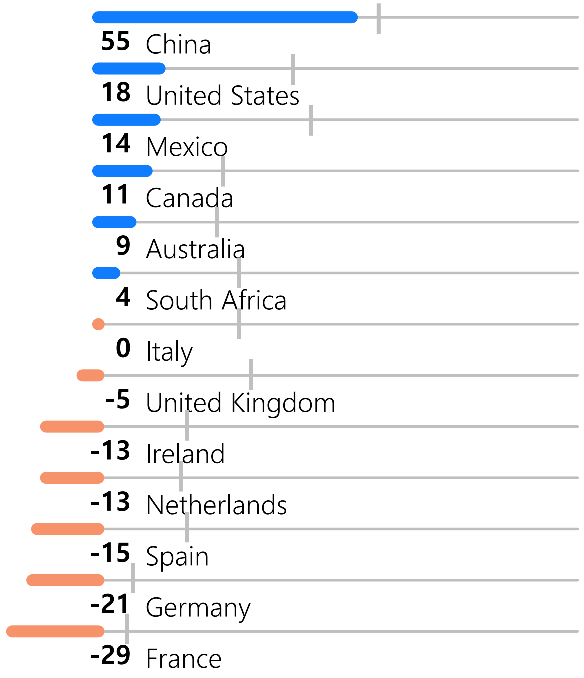
37% Ability

24% Integrity

26% Dependability

30% Purpose

Edelman Net Trust Scores



Overindex to Fast Food global ENTS (120+)

Underindex to Fast Food global ENTS (≤80)

Country-specific ENTS for Total F&B

Edelman Net Trust Score

eat. drink. trust.

People most trust fast food brands that have a **foundation or identity** built on...

- Inspiration
- Connection
- Competence
- Co-Creation

...which can be demonstrated through meaningful **proof points** such as...

Table Stakes:
- Treats customers fairly
- Stands behind products
- Taste
- Familiarity
- Makes people happy
- Grows economy
- Embraces new
- Variety
- Convenience

Differentiators:
- Simple/clean ingredients
- Access to information
- Proactively solves problems

Indirect Drivers:
- Versatility
- Innovation
- Best products
- Educates consumers

...and acknowledges some of these core **external influences.**

Indulgence alone no longer drives fast food

Consumers are most adventurous in fast food

Elevated basics remain a rising food trend

in summary

moving forward, there are five key takeaways for all F&B brands regardless of category

1.

People expect food & beverage companies to step up and **make a difference in the here and now; food waste and access** being the number one priority.

2.

Gaps in trust across the industry stem primarily from low levels of perceived **integrity and dependability**; focus on **solutions and transparency.**

3.

Food and beverage are a complex sector with **varying degrees of trust**; glory and impact come from **partnership** not ownership.

4.

Audiences have **different relationships** with what they eat and drink; effective strategies **appeal to individuals** over the masses.

5.

Trust comes from the **sum of many parts,** not one-off tactics; create a roadmap that connects your brand foundation to **consistent, trust driving actions.**

Thank you!