

FOOD

2020



the Food eVangelist
moves from niche to the
new normal



break through

Yes, that is the ground moving under your feet.

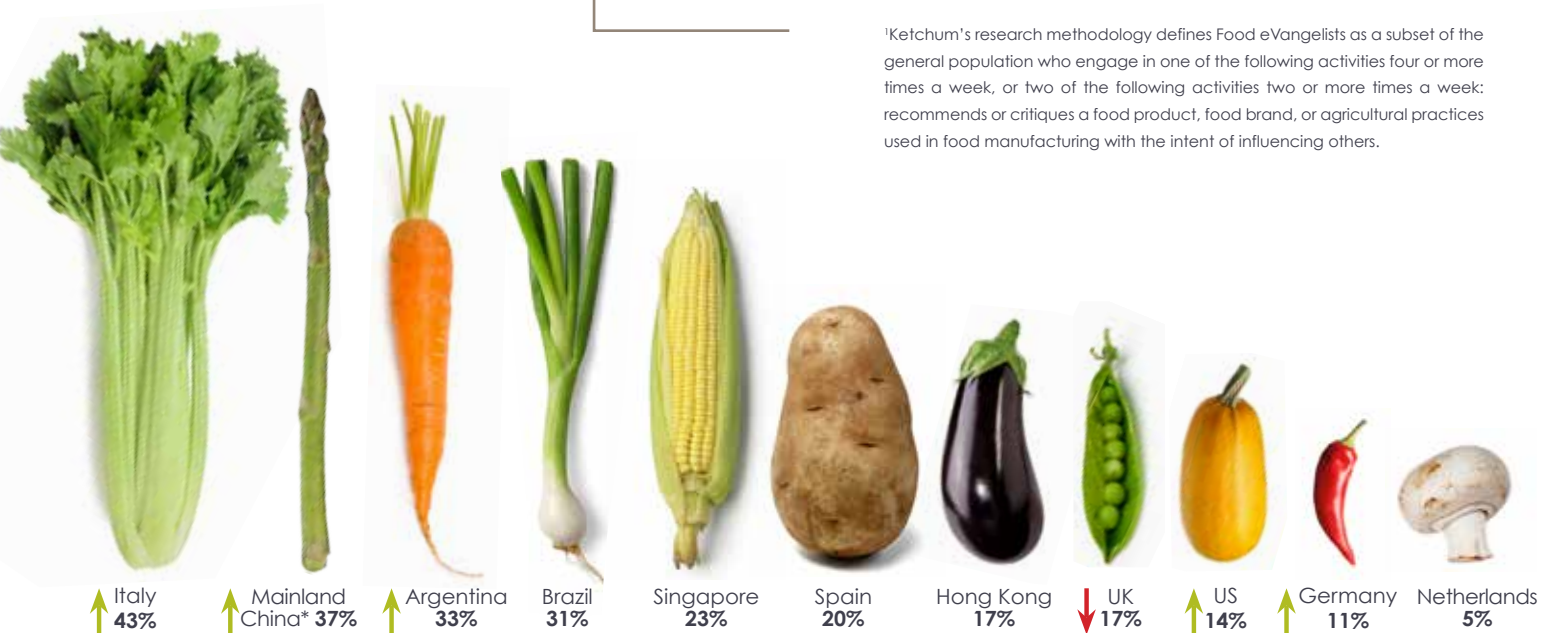
The shift in consumer attitudes and behaviors that began influencing the food industry in recent years has grown from relatively isolated rumblings into a full-on, seismic event.

Food eVangelists: Once small and influential, this group appears on the precipice of becoming the new mainstream consumer.

A Food eVangelist is one who engages in one of the following activities four or more times a week, or two of the following activities two or more times a week: recommends or critiques a food product, recommends or critiques a food brand, or recommends or critiques agricultural practices used in food manufacturing.

A new class of empowered and influential food critics – we labeled them Food eVangelists in the 2013 edition of our Food 2020 Study – is no longer a small group with disproportionate power. They comprise an increasingly large, increasingly mainstream, segment that is growing across the globe. In fact, their number has grown 10 percent since 2013. What's more, Food eVangelists have become younger and more representative of both genders, with men now representing nearly half of Food eVangelists globally. One exception to this trend is among Food eVangelists in the United Kingdom, who have decreased in number from 20 percent to 17 percent since 2013.

*Ketchum's research methodology defines Food eVangelists as a subset of the general population who engage in one of the following activities four or more times a week, or two of the following activities two or more times a week: recommends or critiques a food product, food brand, or agricultural practices used in food manufacturing with the intent of influencing others.



Percentage of Food eVangelists in markets studied

* NOTE: 2013 mainland China data represents a sample from a broad spectrum of regions and provinces throughout China. 2015 mainland China data represents a sample from Shanghai only.

PORTRAIT

of a Food eVangelist:



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Food eVangelists. Once small & influential, this group appears on the precipice of becoming the new **mainstream** consumer.

Children are the family conscience-keepers

It wasn't long ago that most families defined healthy eating simply as having a balanced meal, and children had little say about the food that was prepared for them. Those days are gone. Today, Food eVangelists – and their children – are considering such factors as where and how food is grown, how it's packaged and labeled, and how the company treats the environment and its employees.

Children under 18 have a lot to say about food – so much so that Ketchum believes the Food 2020 findings indicate that children are even more strident in their beliefs than their parents. The data strongly suggests that the children of Food eVangelists in all markets studied are poised to become the influencers of tomorrow.

Food eVangelist parents have this to say about their children's behaviors:

- **49%** take an active role in choosing the types of food the family eats
- **39%** look at labels
- **38%** shun foods with certain ingredients
- **33%** initiate conversations about food sourcing and safety
- **33%** express a preference for organic or locally produced food

Attitudes about food are shaped by multiple influencers

Ketchum's ability to look across multiple geographies shows us that parents are actively speaking with their children about all aspects of food; however, their priorities vary significantly by country. What's interesting, though, is that parents report that their children appear to share common beliefs with one another and are consistent in their actions regardless of their home country. For this reason, we believe children are being subjected to multiple influencers.

A good example: in Brazil and Spain, 64% and 59% respectively, agreed that it's important to teach their children about avoiding processed foods, while in mainland China and Germany a mere 30% and 33% agreed – a significant difference. But when asked whether the children themselves actively avoided processed food, the response from all countries was within a few percentage points of the global average of 26%.

The **children** of today's Food eVangelists are poised to become the **influencers** of tomorrow.

Food eVangelism STARTS EARLY

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Food eVangelists seek information everywhere, but trust few sources

The visual nature of food has made it one of the most dominant and shared pieces of content on social media today, amplified by visuals, illustrations and images. But as pervasive as social media is, it is not the only place where people pick up on new food trends. In fact, traditional media outlets continue to capture the attention of Food eVangelists at surprisingly high rates.



Online news source: **53%**



National TV news: **51%**



Local newspapers: **48%**



Local TV news: **48%**



Magazines: **46%**

Traditional Media Holds Its Own



An important point to understand about Food eVangelists is that they are not activists, nor are they affiliated with groups or each other. They are not the extreme, small percentage of the population that can never be reached or satisfied. To the contrary, our experience indicates that Food eVangelists are and can be the moveable middle on many issues. They will actively seek information to develop their own conclusions.

Food eVangelists are the **moveable** middle on many issues.

When it comes to researching a topic their top five go-to sources are: family, nutrition professionals, friends, local farmers, medical professionals. This finding is significant for the food industry, as it indicates that nutrition professionals have earned the trust of Food eVangelists – even more so than medical professionals. Ketchum believes that enhanced understanding of food and nutrition among Food eVangelists has led to the rise in credibility and authority among the global nutrition community over recent years.

To get a closer look at the cultural and geographic differences that determine the sources people trust, we sorted the data a few different ways. In one case we grouped family and friends together as one entity and nutrition and medical professionals as another. In doing so, we found that Argentina, Brazil, Italy and Spain relied far more heavily on professionals than on family and friends. Ketchum believes this finding stems from the high value these countries place on living a fit lifestyle and preventative care, and the role that a healthy diet plays. Medical professionals have long espoused the importance of quality food, making it an important part of the culture.

Grocery stores, agriculture companies and celebrity doctors are among the entities falling to the bottom of the list of go-to sources. Representatives from government/regulatory groups rank lowest of all.

Top 5 Go-to Sources

1 Family



2 Nutrition professionals



3 Friends



4 Local farmers

5 Medical professionals



Relationships lead to trust; trust leads to **loyalty**

Food eVangelists today question whether the large-scale food industry is meeting their needs and often look for other options. They are increasingly turning to products and brands from local producers and specialty food makers. But there's an important detail of which to take note. This preference is not only about the taste, quality or novelty of the product; it's about the shared values Food eVangelist see in the food and people who make the food, and the ability to have conversations with them on any topic. Relationships based on information, knowledge, understanding and values trump transactions. For these reasons, they lean into food made, produced and packaged closer to home because the people behind those brands and companies are far more accessible.





Leaning Toward **Fresh & Local**

69%

Believe fresh food is better than packaged

54%

Believe the best food to buy comes from local farmers with whom they can interact

49%

Believe they trust the quality of food from a local retailer more than mass supermarkets

What Food eVangelists expect from the food industry

Hope is not lost for large food manufacturers. Food eVangelists want to engage with the food industry, with 66 percent saying they want to communicate more with food companies.

What's more, when asked how likely they are to personally engage in a two-way dialogue with food company marketers – specifically via social media – this is how Food eVangelists responded:

Opportunities for a two-way dialogue

How likely are **Food eVangelists** to **engage** in a two-way **dialogue** with food company officials via social media:

To offer product feedback **53%**

If concerned about one of their products **56%**

In general **45%**

When **companies** are expected to get **social**

And as one might anticipate today, Food eVangelists have a rather strong expectation that global food companies will communicate via social media on certain topics. But their expectations are not over the top. Just over one quarter (28 percent) expect companies to offer a direct line of communications with management and a mere 20 percent expect the company to be active on Twitter.

Expectations of how companies will use social media



50%

Interact with consumers
e.g. answer questions



47%

Communicate transparently about
sourcing & manufacturing



44%

Solicit feedback on product
improvements & new products



40%

Provide recipes & cooking advice



40%

Provide deals & coupons



39%

Work interactively/directly with consumers
on product improvements/new products
on ongoing basis

Succeeding as a food marketer

Food eVangelists have forever **changed** the way food companies across the supply chain **need to communicate**. These consumers are increasingly **sophisticated** about how the food industry operates and are **driven by values over value**. As such, business-to-business companies that for decades have operated in the background with little accountability to consumers are now finding themselves in the spotlight. Food eVangelists are **questioning** their operations and **expect** greater access to **information** about their business and the supply chain.

Furthermore, words that until recently had little to no meaning outside of a factory or laboratory are now becoming part of **consumers typical lexicon**. From **GMO** to **probiotic** to **organic**, this language is driving purchase decisions. Marketers need to take a fresh look at the language they use and how they define terms with the mindset and enhanced understanding of the consumer in mind.

Food eVangelists also have an expectation of honesty and transparency from food companies. That's different from perfection. In fact, Food eVangelists **do not believe perfection is attainable**. They understand the issues that food companies are facing, and realize there are multiple challenges. They look for brands and enterprises to switch their focus to "continuous improvement" and take the public and stakeholders **on a journey** with them toward **doing what is better, right and good**.

Ketchum can help navigate this journey

With **more than 60 years of experience** in all facets of the food industry, **Ketchum works alongside its clients** to address and get ahead of the topics that its consumers care about. We know what drives Food eVangelists and **can help build relationships that are critical to business success.**

To learn how, contact:



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www.ketchum.com/special-report/food-2020-food-evangelist

Methodology

The Food 2020 study has been conducted by Ketchum four times since 2008, with the goal of understanding and predicting global consumer behaviors and attitude shifts with regard to food companies – including the actions of food companies and how they operate, as well as the expectations consumers have of those companies. In 2013, the Ketchum Global Food & Beverage Practice, in partnership with Ketchum Global Research & Analytics, identified a powerful and influential group, who we dubbed the Food eVangelists. They are defined as those who engage in one of the following activities four or more times a week, or two of the following activities two or more times a week: recommends or critiques a food product, food brand, or agricultural practices used in food manufacturing with the intent of influencing others. They are not advocating a specific agenda.

This year the Food 2020 study was conducted online among more than 2,000 Food eVangelists in 11 global markets: Argentina, Brazil, Germany, Hong Kong, Italy, the Netherlands, mainland China (Shanghai only), Singapore, Spain, the United Kingdom and the United States. The study focused solely on the Food eVangelists to determine if they are increasing in incidence, as well as to get a better idea of who they are and what they are thinking and doing. The information can help food executives better understand the impact that this growing segment is having on their business and respond in a way that builds trust and enhances the bottom line.

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