Brandwatch Report/

Food & Beverage

AUGUST 2014

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Brandwatch Report
Food & Beverage/ 2014

Why read this?

As social media propels the spreading of ideas, businesses face a rising imperative to listen, understand and connect with their audiences. This report explores the social media landscape for the food & beverage industry and just how powerful online social data can be.

> “ *...a wave of significant change is moving through the food and beverage industry redefining how companies grow, operate, and manage risk. Rapidly advancing technology is driving much of the transformation, providing opportunities to explore new ways of doing business, and to better understand and engage with consumers.* ”

Patrick Dolan,
KPMG National Line of Business Leader, Consumer Markets

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Food and Beverage

A Primer on Food & Beverage

Facing a series of pivotal developments in the social, political and economic landscape, the food & beverage industry is undergoing a highly formative period that intends to redefine the boundaries in which leading businesses can operate.

Namely, the past decade witnessed a social movement for healthy, high quality and transparent food & beverage products gain substantial momentum. Furthermore, as **the economy has slowly pulled forward** since 2008, an increasing number of consumers are making decisions beyond their cheapest option.

Yet behind the menus of restaurants and shelves of grocery stores, these shifts are first ideated in the conversations of the informed consumer, now empowered by widespread technologies, such as social media, that facilitate the rapid dissemination of thoughts and opinions.

These changes, conversations, and the technologies supporting them present both significant opportunities and serious threats to those operating in the food & beverage industry.

Leading brands, recognizing the **swing of momentum**, are now bolstering their demand-side strategies to better understand and strengthen their relationships with consumers.

Food and Beverage
Scope of Report

The following report will outline recent developments in the food & beverage industry through the lens of social media.

The aim is to provide useful insights on the current social media landscape in food & beverage as well as informative case studies, guidelines and best practices for brands seeking to cultivate a stronger social media acumen.

Using current issues such as the health trend as a central model, the report explores the nature of social preferences, consumer-brand relationships, and the way social movements affect businesses.

The concepts are intended to be applicable to all food & beverage brands facing difficult business decisions today. The analysis is broken down into three sections.

1. Defining a Market
Explores how trends or preferences differ across markets and how brands can identify the **market landscape**, access underdeveloped opportunities and stay alert to rising trends.

2. The Person Behind the Purchase
Specifically focuses on ways brands can identify the **underlying motivations** behind conversations and purchase decisions. The section also outlines opportunities for brands to improve their social engagement, focusing on the specific times, websites and campaigns that are most influential.

3. The Life of a Crisis
Outlines the way threats or crises develop, specifically examining how the informed consumer, now empowered by **easy communication**, has reshaped business dynamics. Sweeteners, GMOs, labeling laws, Yelp, and effective crisis management are discussed.

Food and Beverage

A Force in Motion/ Trends

For brands in the food & beverage industry, juggling fluctuating levels of supply and demand can be like hitting a moving target from a moving platform.

Niche Food & Beverage Markets	Positive Effect	No Effect	Negative Effect
Premium & Luxury	60%	36%	3%
Healthy & Nutritious	59%	32%	9%
Locally Sourced	49%	43%	8%
Sustainably Produced	46%	49%	5%
Convenience	43%	50%	6%
Organic	36%	56%	8%
Private Label Brands	36%	40%	24%
Ethnic	35%	60%	5%
Gluten-free / Allergy-free	34%	60%	6%
Functional	29%	69%	2%
Sustainable Packaging	25%	63%	12%
Whole Foods (Fruits & Vegetables)	22%	75%	3%
Non-GMO	19%	71%	10%
Retailers Reducing Product Varieties	15%	38%	47%

Fig.1 food trends affecting organizations in next 12 months, data by **Grant Thornton International**

Temperamental shifts in consumer **preferences and trends** constantly present businesses with a changing set of opportunities and threats.

Over the past decade, a large-scale **social movement** for healthy, high quality and transparent food and beverage products has gained substantial momentum. Indeed, food executives cite the trend toward premium and healthy products as among the most influential to their organizations in 2013 (Fig.1).

Like past and future trends, the push for health foods has rippled throughout the industry, driving strong reactions from existing brands as well as exciting opportunities for the newcomers.

Food and Beverage

1 Defining a Market

Every trend manifests itself differently. For industry leaders, a clear understanding of a trend's landscape is essential for making informed, strategic decisions.

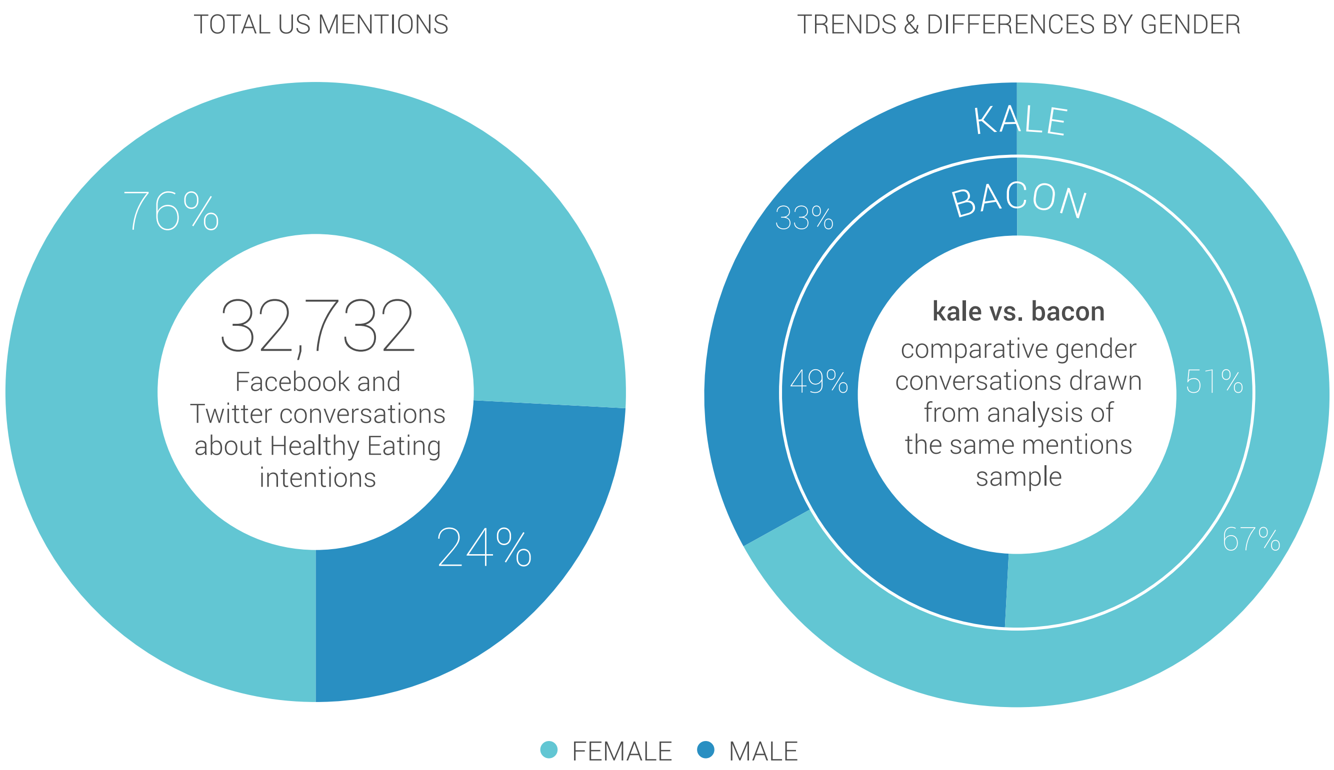


Fig.2 data from the **International Food Information Council**

In online conversations surrounding **healthy eating intentions**, the share of voice is predominantly female. While past research [1] has indicated that women tend to have healthier eating habits, the exceptionally low level of males suggests a reluctant or underdeveloped market within the trend (Fig.2).

Comparing the **bacon** trend against that of health food **kale** reveals that while kale conversation is still largely female, bacon chatter is gender neutral.

Brands operating within the health trend should recognize the dearth of males contributing to online discussions. Products that are not healthy should be wary of the effect the trend may have on their female consumers.

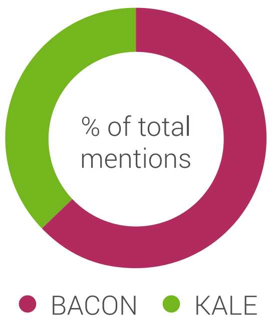
1 International Food Information Council (IFIC)

Food and Beverage

1 Defining a Market/ A difference in taste

With the continual growth of online communication, the spreading of social movements and ideas now transcends physical borders.

RELATIVE MENTIONS OF BACON AGAINST KALE ACROSS UNITED STATES



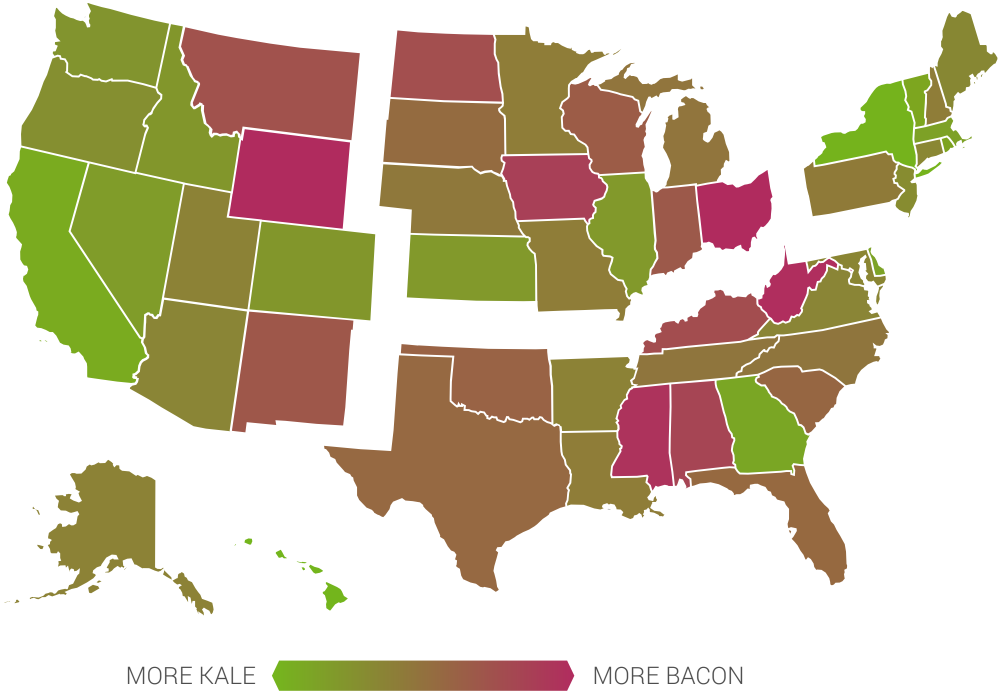


Fig.3 data from **Brandwatch**

However, certain areas are often far more receptive than others. Comparing **bacon conversation** against that of kale shows how the two trends have developed unique followings throughout the US (Fig.3). While bacon remains a more common topic across all states, kale is a much stronger contender in the Northeast and West than in the South and Midwest.

Digging beyond just kale and bacon, the **regional breakdown** is indicative of how various markets have received each food. States favoring kale may also welcome other health foods.

Brands need to understand both the structure of such trends as well as how their products may be affected by them before they can define a market's opportunity.

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1 Defining a Market/ Big brands

As the health trend amasses a wider audience, both established food & beverage companies and niche brands have stepped in to supply for the new demand.

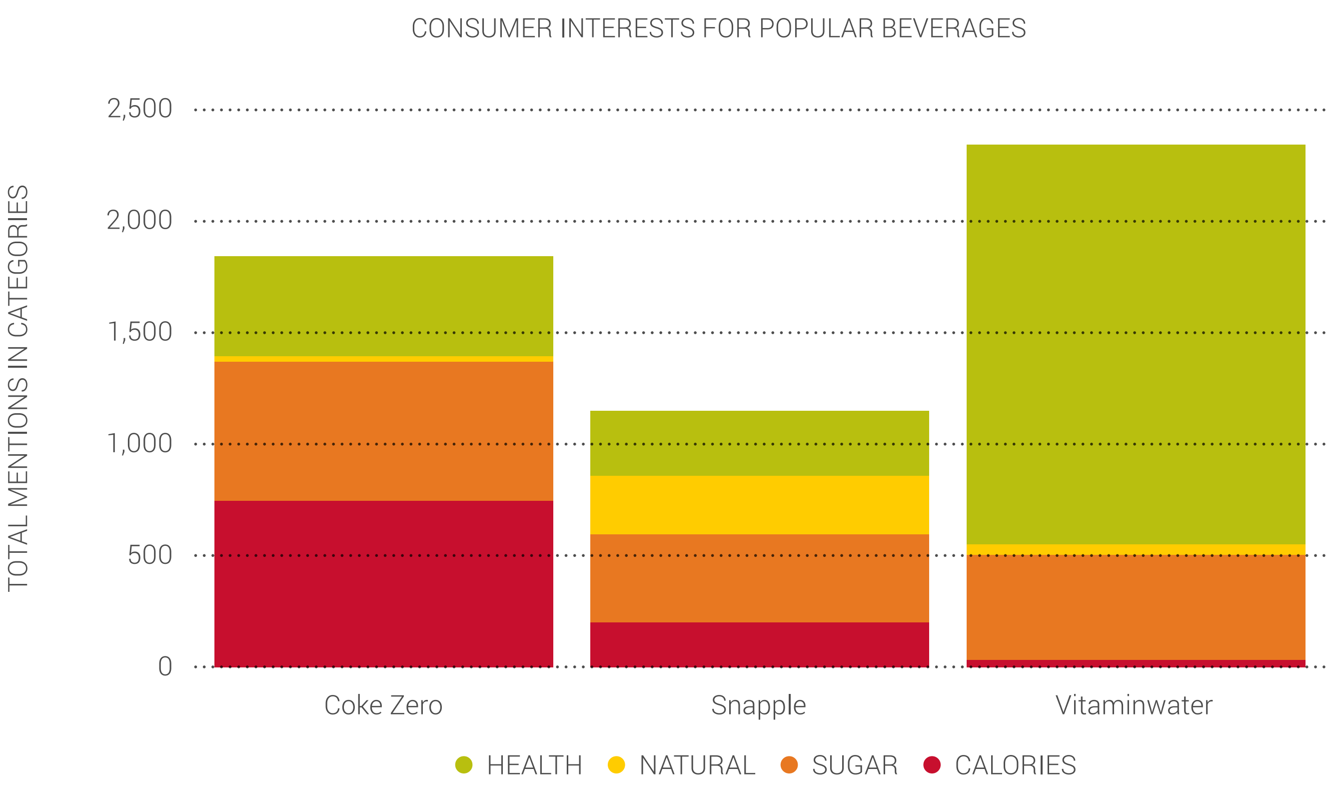

Fig.4 data from **Brandwatch**

However, the conversations surrounding products vary as each brand targets unique needs and attracts consumers with distinct interests (Fig.4).

For example, Vitaminwater generates the most chatter around its health merits but is also criticized for its sugar content. While Coke Zero garners **balanced conversation** for the health benefits of having no calories or sugar, Snapple is the most successful in establishing itself as a natural product.

For manufacturers, grocers and restaurants, a strong understanding of their social positioning in key interest categories amongst the competitive landscape is paramount to strategic decision-making.

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1 Defining a Market/ Niche markets

Many small-to-medium-sized brands are also gaining significant traction as they fill the niches created by the diversity of consumer demand.

CONSUMER INTERESTS FOR SNACK BARS

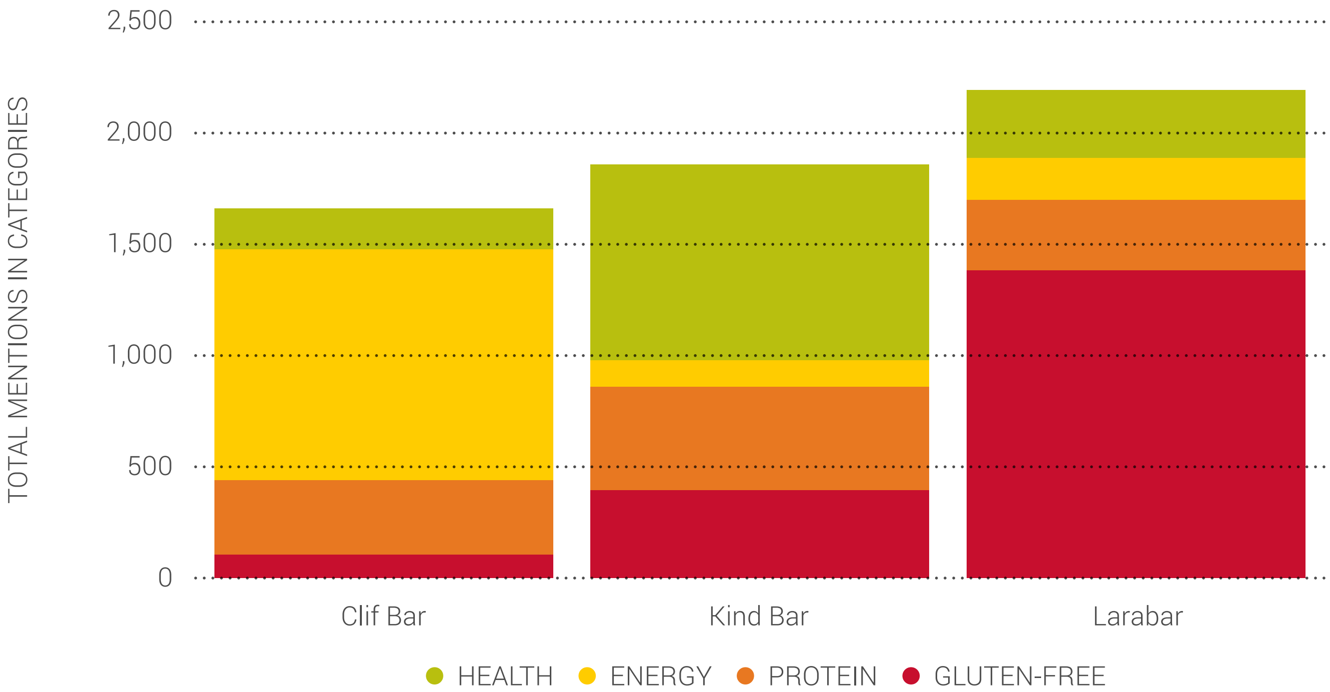

Fig.5 data from **Brandwatch**

The growing market for snack bars provides an excellent example of how these brands are carving out **unique segments** (Fig.5). Clif Bar, Kind Bar and Larabar's marketing strategies have effectively generated conversation as energy-providing, healthy and gluten-free options, respectively.

The emergence of such niche products **stands testament** to how the health trend has segmented the market as consumers seek the ideal product to satisfy their individual preferences.

Brands should be conscious of the small markets younger brands are creating. Gluten-free, once a niche market, is now worth $4 billion after experiencing a 28% annual compound growth rate between 2008 and 2012 [2].

2 Grant Thornton International

Food and Beverage
Key Takeaways

While social media has broken down communication borders, ideas and opinions have not always spread evenly across demographics and interest groups.

The current health trend is predominantly female and located in the US's West and Northeast. Big- and small-name brands alike have, with varying success, aimed many products toward capturing parts of an increasingly segmented market.

For brands, identifying and acting upon such trends is essential for capitalizing on and preparing for fluctuations in consumer interests.

Current Challenges:

- Uncover the demographics behind an idea, trend or product.
- Gain an accurate picture of a trend's viability.
- Discover how a brand's products align with it.
- Identify underdeveloped markets and the means to access them.
- Understand the competitive landscape across interest categories.

Recommendations for Social Listening.

- Analyze trends to identify how products may perform across regions, genders or interest groups.
- Set in place a monitoring system that discovers niche markets before they become large trends.
- Uncover the specific language that consumers are using around a product and understand how words affect social perception.
- Understand how products are perceived in comparison to the competition. Specifically, focus on how products capture specific consumer interests.

Food and Beverage

2 The Person Behind the Purchase/ Overview

Before a trend can rearrange the grocery store shelves, it must first be created and driven by the informed consumer.

Consumers, empowered with the ability to rapidly communicate ideas through social media, are now capable of creating **influential trends** at a dizzying rate (Fig.6).

As a result, brands have recognized the imperative in reacting quickly to constantly changing preferences and are redoubling their efforts toward the consumer demand chain[3]. Through **social analytics**, brands are better equipped to understand their consumers' motives and create stronger relationships through informed marketing and engagement.

Social media enables brands to engage in two-way communication with their consumers, an opportunity to build relationships that traditional media has never offered. Still, many brands struggle to capture a holistic understanding of the consumer voice.

Fig.6 The Social Sphere

3 Grant Thornton International

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2 Behind the Purchase/ Health trends

Understanding the motives behind a trend or purchase decision is essential for brands trying to develop new markets or create competitive products in existing ones.

INTERESTS CATEGORIES FOR CONSUMERS WITH HEALTHY EATING INTENTIONS

60% General Health

16% Temptations

12% Body Image

11% Exercise

01% Taste

Fig.7 data from **Brandwatch**

A deeper analysis of online conversations indicating healthy eating intentions **sheds light** on the nature of the movement and the emotions driving health trend consumers (Fig.7).

The 12% of discussion focused on one's body image suggests that for a considerable portion of health trend followers, the **underlying motive** is actually an ideal body. Furthermore, a smaller group associated healthy eating with exercise. Temptation foods, over half of which mentioned pizza, were also a leading topic, emphasizing consumers' desire to eat healthy and their internal struggle to actually do so.

By associating products with underlying motives, brands can capitalize on well-ingrained consumer interests.

Food and Beverage

2 Behind the Purchase/ Consumer voice

The interests and underlying motives of consumers often differ across regions, demographics and even websites as people band together.

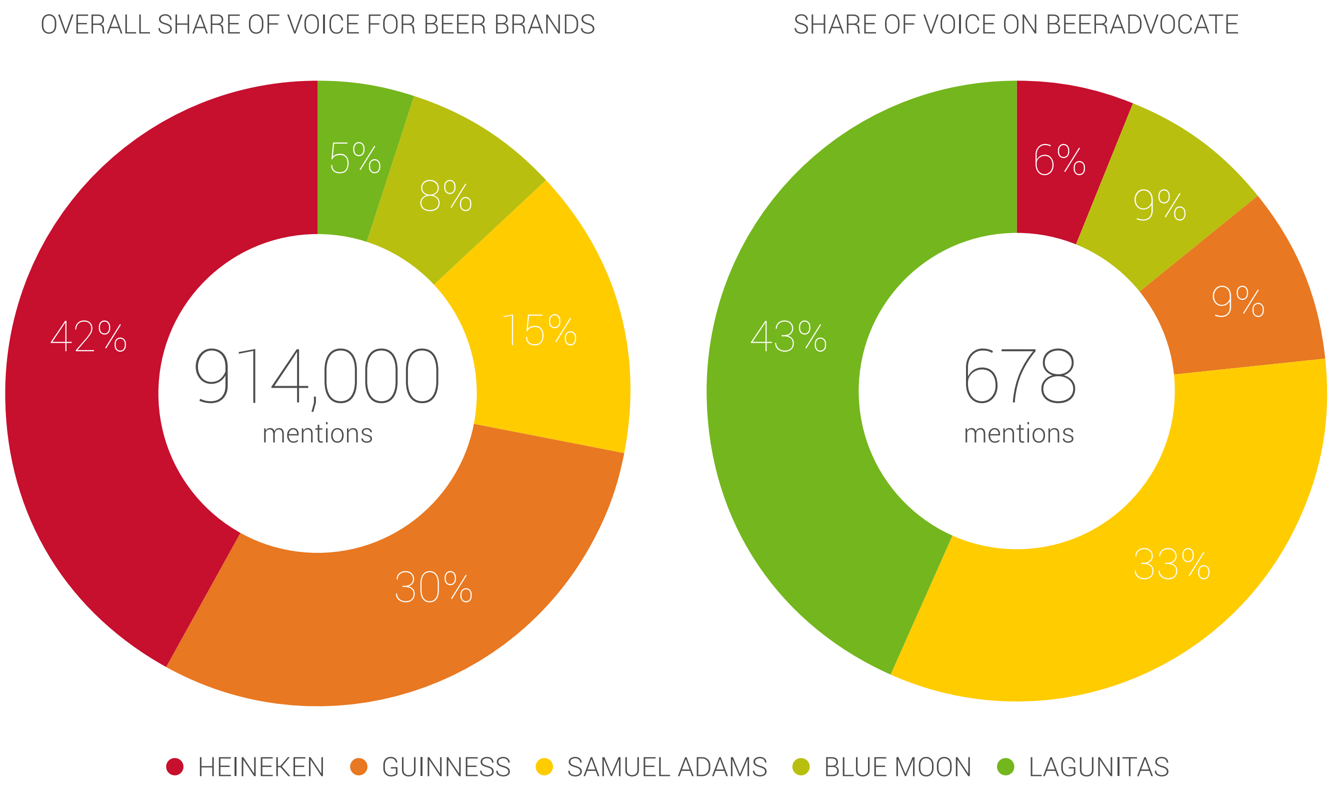

Fig.8 data from **Brandwatch**

An analysis of conversation on beer brands in the US reveals that while the general **share of voice** favors Guinness and Heineken, craft beers Samuel Adams and Lagunitas dominate the conversation on blogs like BeerAdvocate (Fig.8).

The data suggests that while Heineken and Guinness are the **mainstream favorites**, blog discussions, focused on craft beers, hold significant weight among beer enthusiasts.

It's important that brands recognize how the consumer, tone and underlying motives of conversations may differ across online platforms and how those differences reflect a brand's position as a mainstream or niche product.

Food and Beverage

2 Behind the Purchase/ Get the timing right

For many brands and products, consumer interest may be affected by campaigns, world events, seasons or time of day in expected or unexpected ways.

VOLUME TIMELINE FOR CORDIALS

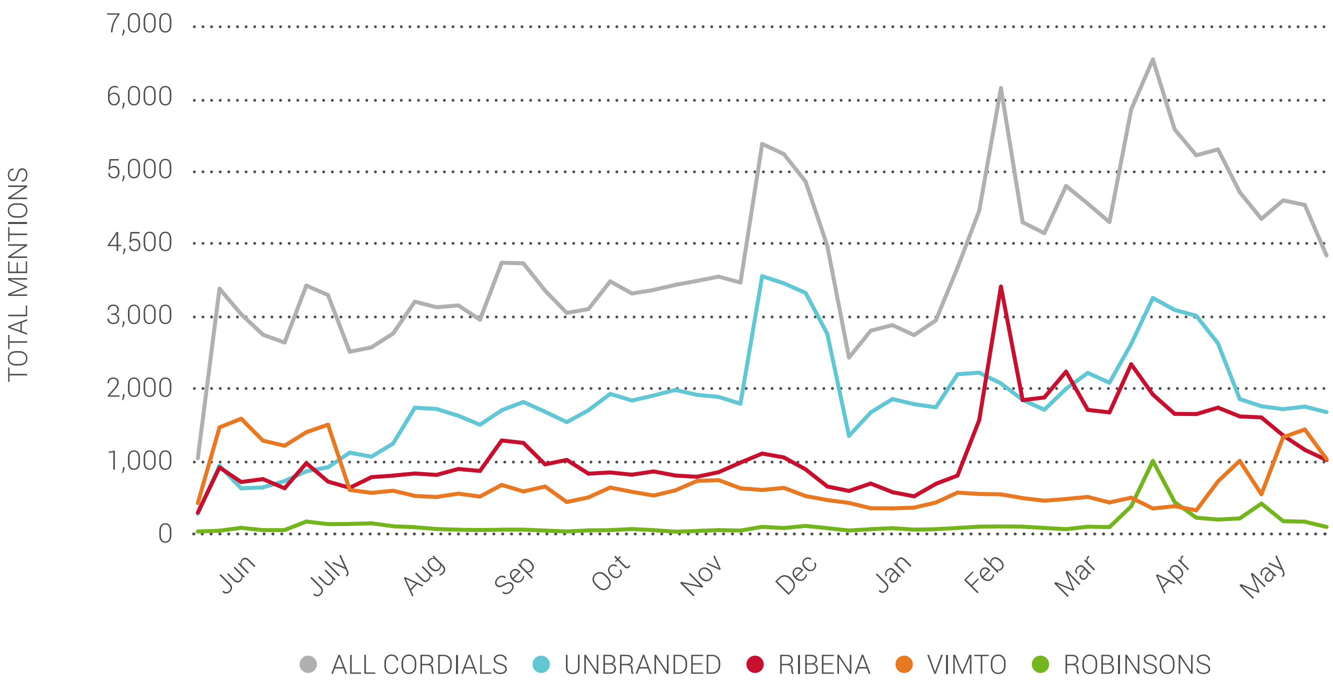

Fig.9 data from **Brandwatch**

The UK market's online discussions of cordials reveal how chatter fluctuates **over the course of a year**. Ribena's conversation peaked in mid-February and was well-sustained through May. Vimto conversation peaked from June - July due to its association with Ramadan. For Robinsons, releasing their Squash'd product garnered a solid peak in April (Fig.9).

However, **leading cordials** are not successfully capturing the unbranded boom in chatter throughout December.

Analyzing these annual peaks, brands can create campaigns surrounding relevant events, measure a campaign's success or reach, and prepare for predictable fluctuations in consumer interest.

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2 Behind the Purchase/ The forest and the trees

When measuring the timeline of consumer activity, as in all social media analyses, the micro-picture may be just as insightful as the broader one.

AVERAGE DAILY TWEETS FOR HEALTH GROCERS AND CONSUMERS

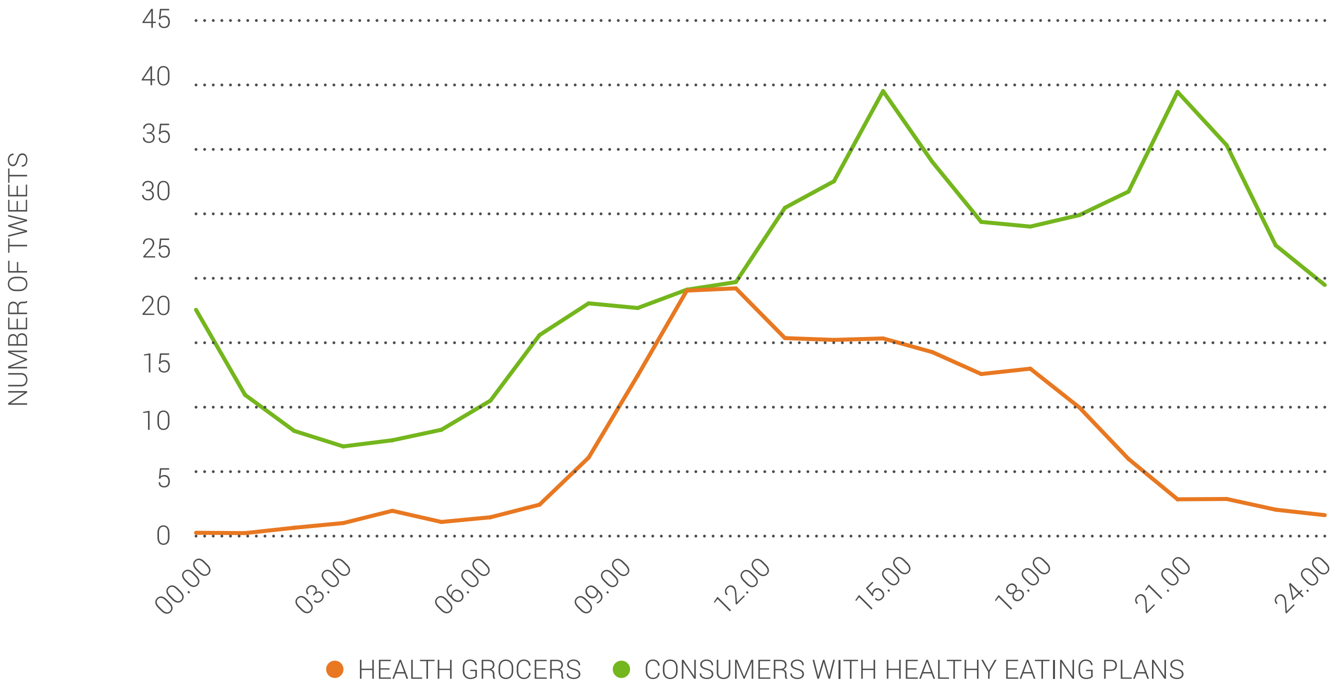


Fig.10 data from **Brandwatch**

A snapshot of daily online consumer activity reveals that tweets discussing an **intention to eat healthy** are most common around 3pm and 9pm ET. However, Fig.10 also shows tweets from leading health food grocers are most common during regular work hours and peak from 11am - 12pm.

The discrepancy in account activity between consumers with healthy eating intentions and brands providing health foods indicates that brands are **not fully engaging** with an inclined audience.

By identifying the opportune time, motive and platform to engage with consumers, brands can foster new leads and expand or strengthen their social community.

Food and Beverage

2 Behind the Purchase/ Starbucks seasonal campaign

By identifying the motives that drive purchases and how those motives change over time, brands create targeted campaigns that bolster their product's reputation.

VOLUME MENTION & TIMELINE FOR SUMMER BEVERAGES

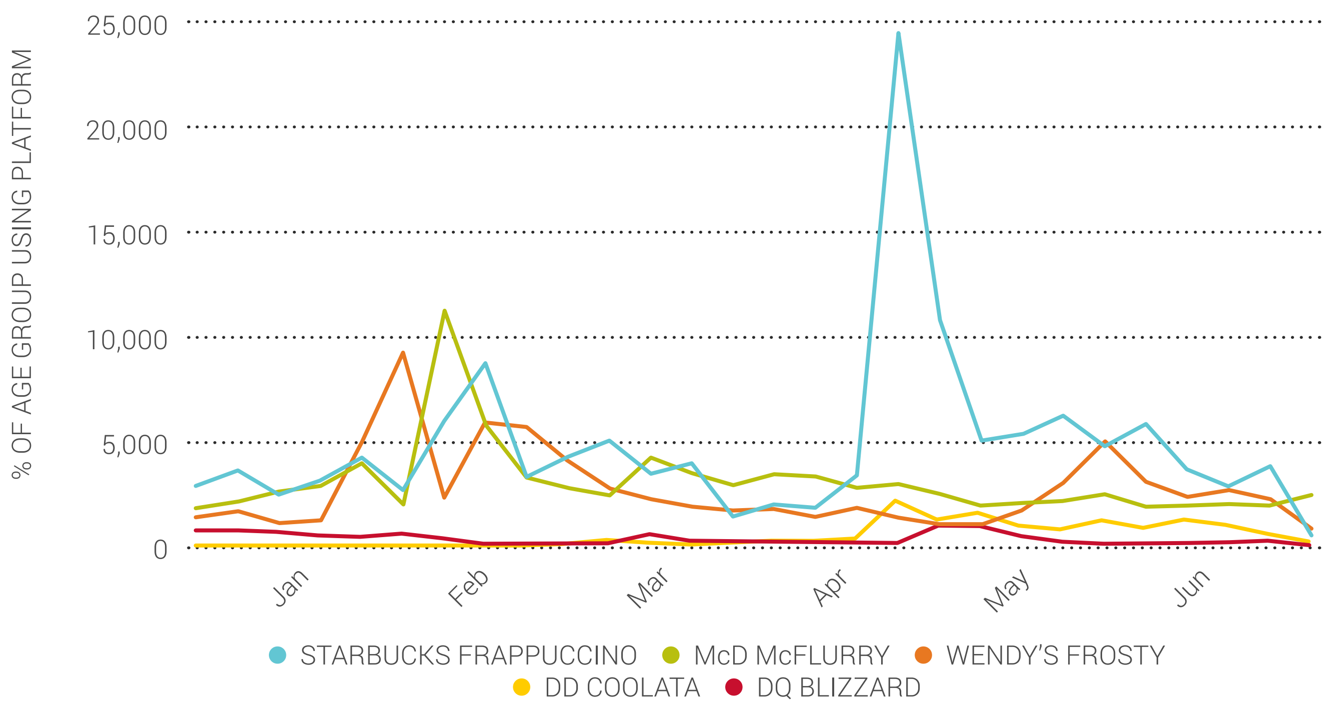


Fig.11 data from **Brandwatch**

Starbucks' annual **Frappuccino Happy Hour** is a great example of a well-timed campaign capitalizing on consumer motives.

Offering half-priced frappuccinos in May, Starbucks' campaign successfully brands frappuccinos as a summer beverage by generating **significant buzz** around #FrappuccinoHappyHour at summer's start. Comparatively, only Dunkin' Donuts' Coolata and Wendy's Frosty are close to on par with a Frappuccino as a summer beverage (Fig.11).

By positioning frappuccinos as a summer beverage every May, Starbucks does an excellent job of branding its product and capturing a considerable portion of the seasonal market.

Food and Beverage

2 Behind the Purchase/ Robinsons Squash'd

In a similar vein, brands have also attracted conversations by associating their products with socially relevant events, riding off another topic's buzz.

For Robinsons Squash'd, advertising agency Iris Worldwide identified a key topic that would activate UK consumers' passion for Wimbledon.

In a 40-second advertisement, they pitted former British tennis star Tim Henman against the mother of Andy Murray, UK's only living men's **Wimbledon champion**. In the video, the two tennis icons faced off for naming rights on a grass court. Cleverly bringing the **audience to action**, the advertisement calls for votes for #HenmanHill or #MurrayMound.

The Wimbledon advertisement tactfully connects traditional video advertisements to a **social media movement**, simultaneously generating brand awareness and cultivating an online community.

By identifying a strong underlying passion for tennis, creatively aligning their brand with Wimbledon and timing their campaign alongside an annual spike in chatter, Robinsons Squash'd more than doubled their mentions for that week.

Food and Beverage
Key Takeaways

Social media gives businesses the ability to build strong relationships with their consumers and online communities that traditional media never has.

Yet many brands still struggle to effectively listen, understand and connect to their consumers.

Brands can better comprehend their consumers' underlying motives or interests by analyzing the conversations surrounding any given trend, brand or product. Understanding how, on which website, and at what time to engage consumers is essential to a successful campaign.

Current Challenges:

- Taking advantage of the two-way communication offered through social media.
- Understand the underlying motives behind a trend or conversation.
- Discover meaningful discrepancies between the chatter on different websites.
- Acknowledge how conversations change throughout a year, week or day.
- Develop creative advertising campaigns that effectively capitalize on time-based fluctuations in conversation and the key motives driving purchases.

Recommendations for Social Listening.

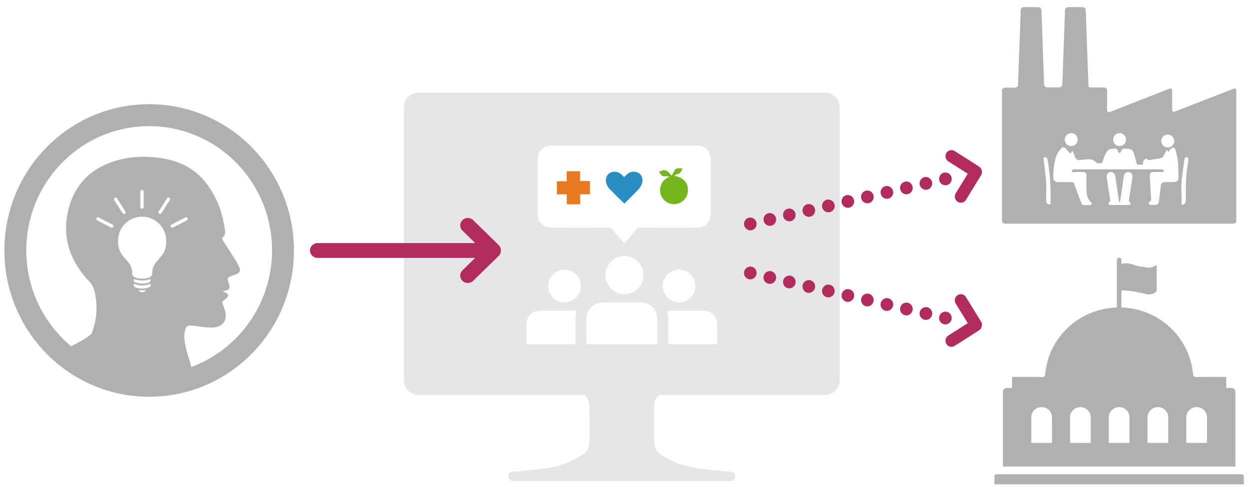
- Go beyond the basics to uncover underlying motives behind a trend, interest or purchase decision.
- Compare conversations across social channels.
- Track the fluctuating competitive landscape over time.
- Identify the opportune subject and timing to engage consumers with.
- Create unique advertising campaigns by being socially aware, measuring success through analytics.

Food and Beverage

3 Lifecycle of a Crisis

With the rising health trend, many food & beverage companies have faced an onslaught of criticism for their products' ingredients, production methods and nutritional values.

THE TRANSMISSION OF SOCIAL CHANGE



IDEATORS & ADVOCATES

SOCIAL MOVEMENTS, PRESSURE GROUPS & ONLINE COMMUNITIES

BUSINESSES & GOVERNMENTS

Again, these issues are first brought into the public eye by the informed consumer. Social media has given **health advocates** a platform to spread their opinions that has never before existed.

With consumers' newfound influence, governments and businesses alike are often forced to respond to **social movements** when the public force behind them quickly grows unignorable. Food regulations, labeling laws and social stigmas have had massive effects on the success of many food & beverage products.

Businesses that stay abreast of the social landscape are better suited to prepare for and react swiftly to these rising threats.

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3 Lifecycle of a Crisis/ The sweetener outlook

Recent strategy shifts from some major players in the food & beverage industry demonstrate how social movements are reshaping the way businesses operate.

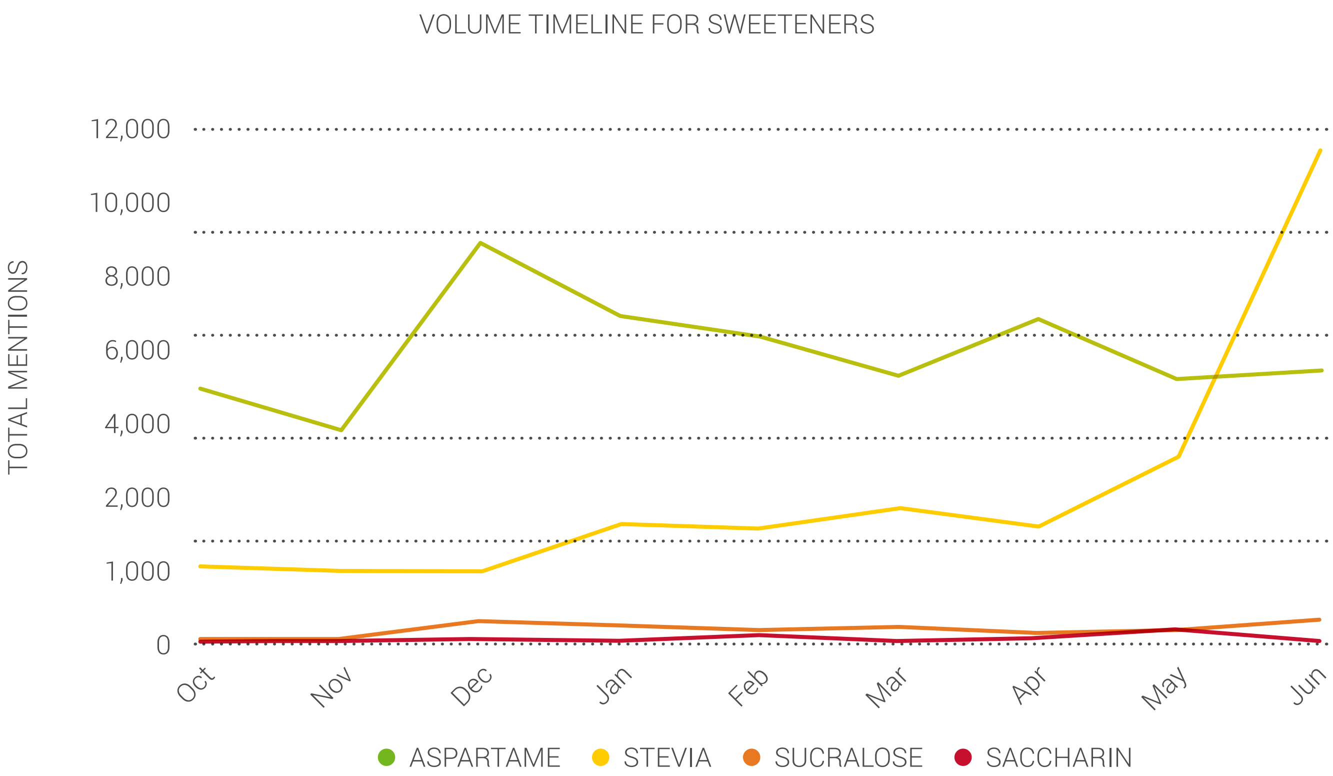


Fig.12 data from **Brandwatch**

Fig.12 compares the volume of conversation around four popular sweeteners: Aspartame, Saccharin, Stevia and Sucralose. Of note is the strong upshot for Stevia discussion in June, which is largely the result of Coca-Cola announcing plans to introduce the Stevia-sweetened Coke Life into the UK.

Coca-Cola's decision and the ensuing wave of conversation are indicative of the **growing consumer interest** toward organic ingredients.

Furthermore, Coca-Cola's reaction stands testament to the general public's ability to communicate with brands and evoke strong responses from them in an increasingly two-way relationship.

Food and Beverage

3 Lifecycle of a Crisis/ The sweetener outlook

Brands are increasingly adept at listening to consumers, recognizing that volume, tone and sentiment are all key.

CONSUMER CONVERSATIONS ACROSS SWEETENER BRANDS

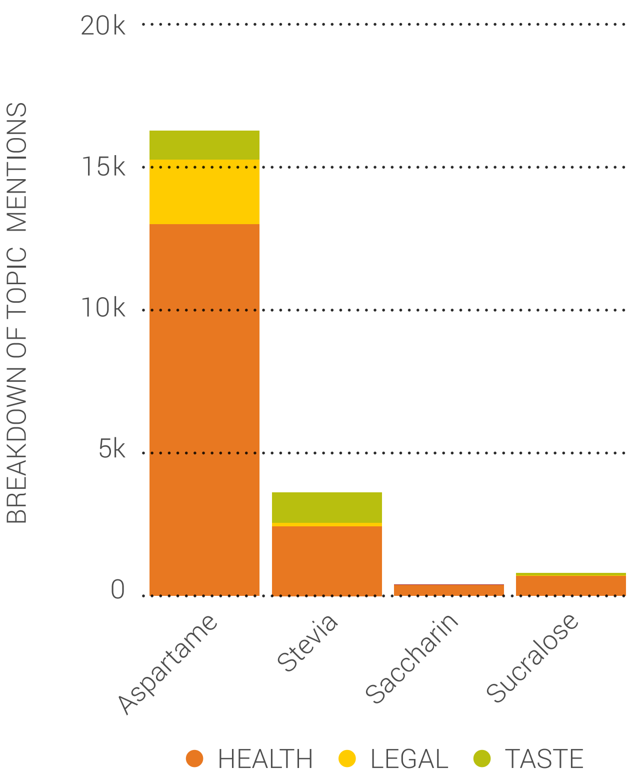


Fig.13 data from **Brandwatch**

A closer analysis comparing Aspartame and Stevia reveals the nature of these conversations (Fig.13). Across all sweeteners, **health** is of the greatest concern.

A closer snapshot of these discussions reveals that the **sentiment** toward Aspartame's health is overwhelmingly negative as compared to that of Stevia. Yet interestingly, the chatter around taste reflects a similar pattern.

The data suggests that the informed consumers discussing sweeteners are strongly in favor of Stevia – yet that may not reflect the average consumer.

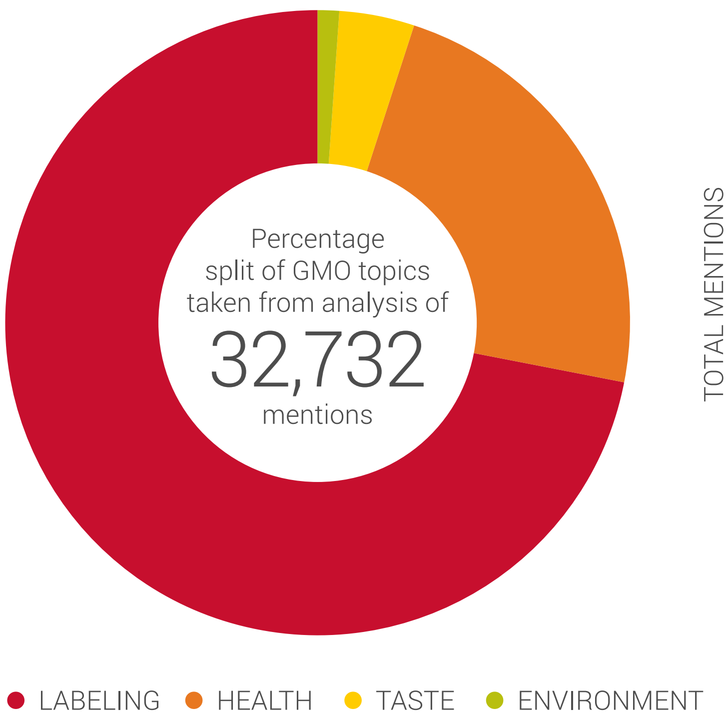
This shows us how brands can gauge the gravity of a threat by understanding the volume, tone and underlying concerns behind it.

Food and Beverage

3 Lifecycle of a Crisis/ A deep dive on GMOs

Businesses are not always in a position to easily adapt to public pressures.

OVERALL GMO CONVERSATION



GMO CONCERNS BY FOOD TYPES

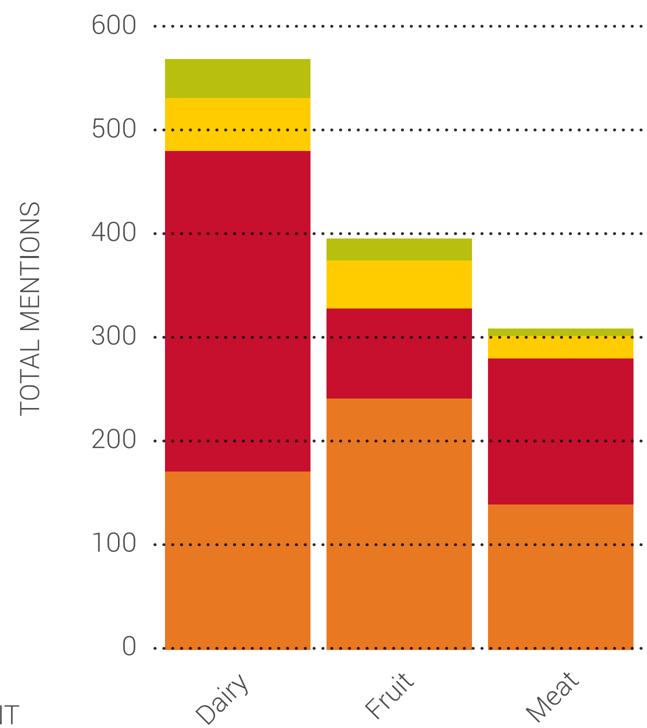


Fig.14 data from **Brandwatch**

Often the threat of appeasing a social movement will outweigh the benefits. An analysis of several key topics within online conversations of GMOs reveals the nature of a public demand directed toward government action (Fig.14). Overall, conversations mentioning **labeling laws** outweigh chatter around health, taste and environmental issues.

It's clear that non-GMO activists have realigned their pressure toward an **aggressive** government appeal. While all producers of GMO products should be wary of the growing public GMO concerns, it appears that dairy is of specific interest to activists.

With over 25,000 mentions of labeling laws from March through June, the data sheds light on the growing social pressure for government action.

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3 Lifecycle of a Crisis/ Menu labeling

The growing focus on healthier eating has put pressure on governments to strengthen rules and regulations promoting food transparency and accountability.

CONVERSATIONS DISCUSSING PRODUCTS' "CALORIES" AT FAST FOOD CHAINS

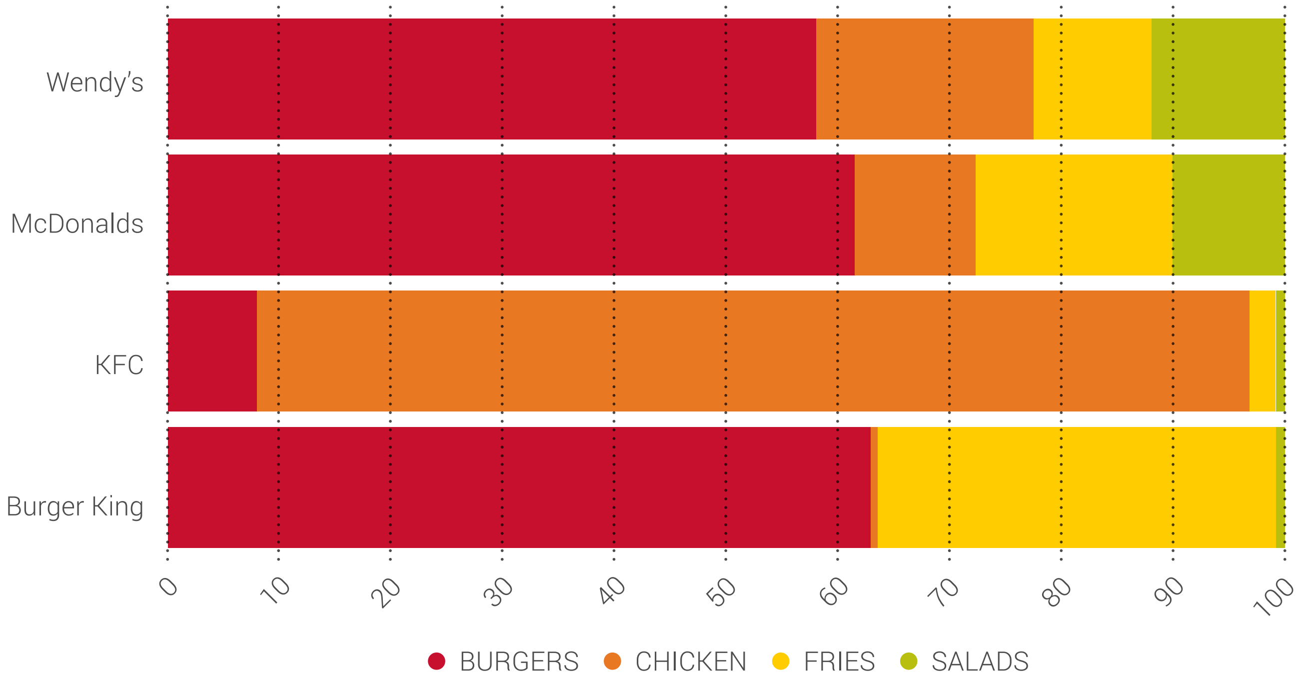

Fig.15 data by **Grant Thornton International**

Labeling laws requiring chains to include calories on menus has had a noticeable effect on customers [4]. Specifically, chains offering more low-cal options have witnessed a **greater reduction** in average calories consumed.

Fig.15 analyzes conversations mentioning the **calorie content** of different food groups for four large fast-food chains. Of the four, Wendy's, which embraced the labeling laws and released a calorie-counting app, has the greatest proportion of chatter around its healthier salads.

Yet Wendy's is not alone in their endeavors to react to the changing playing field—many fast-food and chain restaurants are now introducing healthier options.

4 The Economist

Food and Beverage

3 Lifecycle of a Crisis/ Chobani

While the age of easy communication has empowered consumers, brands with a strong online social presence can mitigate potential crises by responding quickly with a clear message.

Indeed, a 2012 study from The Four Peaks Review found that consumers are significantly more likely to go to a restaurant when managers provide constructive responses to Yelp criticisms than when they provide no response or even combative responses[5].

Chobani, a company that has flourished during the health trend, exemplified its **social media prowess** in the way it handled a crisis surrounding a batch of moldy yogurts. The brand quickly acknowledged the issue on its social media accounts and website with a **direct comment** from CEO Hamdi Ulukaya.

They created a blog to update all of their followers on the issue and opened themselves up to negative feedback.

While their transparency opened them up to an immense amount of criticism, it also made a statement about how much the company **values its consumers**—a statement that has earned Chobani a strong social community since they started in 2005.

Chobani's case study is an excellent example of a food business that listens to its consumers on social, identifies issues early, and responds with honesty and transparency.

As a brand, they are **lauded** as a leader in social media strategy, continuously identifying and engaging with relevant conversations and providing excellent customer service and timely responses to any social inquiries.

5 Evans et al

Food and Beverage
Key Takeaways

As the interests of the empowered and informed consumer fluctuate, food & beverage brands constantly face a series of threats and opportunities.

These changes come to fruition when the general public pressures governments or businesses into action.

Indeed, Coca-Cola's introduction of a Stevia-sweetened Coke, menu-labeling laws, and proposed GMO labeling laws all stand testament to the public's ability to powerfully convey their message. Although consumers are greatly empowered by the ease of communication today, brands can still capitalize on these shifts by staying aware of the social conversations that matter.

Current Challenges:

- Adequately identify potential threats early and often.
- Gauge the momentum and force behind a social push.
- Understand how social changes can affect the competitive landscape.
- Engage with complaints or concerns in a constructive manner.

Recommendations for Social Listening.

- Create queries to identify in real-time how, where and when the conversations surrounding certain threats are taking place.
- Pay close attention to spikes in conversation that may indicate a trending issue, specifically analyzing the sentiment and key topics.
- Understand and track how competitors are effectively changing their social presence in response to crises.
- Clearly define a framework to ensure social media engagement is consistent and transparent. Learn from the mistakes and successes of other brands' social media plans.

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Implementing the Right Technology

Brandwatch is designed to let brands harness the growing power of online conversation data to enhance their business functions.

- Instantly obtain clean and accurate data from conversations happening across the web with the ability to **separate and analyze data** by authors, websites, networks, time and other customizable rules.
- Discover the current market for a given product across various **demographics metrics** including gender, region, profession, interests and more. Identify which markets are oversaturated and which are underdeveloped.
- Find, analyze and **interpret** all relevant conversations to gain a deeper understanding with the consumer, optimizing social engagement strategies.
- Perform in-depth market research to uncover the competitive landscape through the public's natural conversations and discover **untapped or underrepresented** interests.
- Effectively keep tabs on all potential **social threats**, evaluating specific concerns for products or ingredients and understanding how competitors' reactions have succeeded or failed.
- Monitor a brand's reputation, campaign performance or product launch in real-time to grow **more vigilant and responsive** to consumer opinion through email alerting tools and automatic sentiment analysis.
- Use Brandwatch's social data in more places, for more purposes, by taking advantage of our partnerships and integrations with leading technologies like **Hootsuite's**, **Spredfast** and **Clarabridge**.

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Thank you

We hope this report provides your business with some helpful insights on the current social landscape for food and beverage brands and ways to improve your social media strategies. Please do get in touch or **request a demo** if you have any questions on social media analytics or how we can tailor a solution for your brand.

About Brandwatch

Brandwatch is one of the world's leading social media listening and analytics technology platforms. It gathers millions of online conversations every day and provides users with the tools to analyze them, empowering brands and agencies to make smarter, data-driven business decisions.

The company grew over **100% year-on-year** in 2013, has won awards for its technology and renowned corporate culture, and regularly wins accolades for its impressive growth. The Brandwatch platform is used by over 1000 brands and agencies, including Whole Foods, Verizon, Whirlpool, Pepsico, British Airways, Papa John's, and Dell.

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