



FLEISHMANHILLARD

Navigating a **United vs. Divided** Nation

Food & Drink Communications in 2021

February 2021



Introduction

We have long maintained that the food and drink we choose to purchase and consume says a lot about the kind of person we are. It is an expression of what we consider important to us and the values we hold dear.

Three forces – coronavirus, climate change and Brexit – have all had a profound impact on this, as well as on our outlook towards the sector in the UK. But this impact can be felt in different, uneven, and unexpected ways.

At the end of 2020, FleishmanHillard UK commissioned new research to better understand how public opinion is 'united' or 'divided' across the nation regarding the impact of these three forces on the food and drink industry and how successful, integrated, communications can help the sector navigate this territory in 2021.

Do you agree with our findings? What other ways have these three forces had an impact on the food and drink we choose to purchase and consume? Please share your thoughts with us, join in the debate on our social channels, or get in touch to learn more about our work and outlook on these important issues.

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About the report

FleishmanHillard's TRUE Global Intelligence surveyed a nationally representative sample of the UK totalling 2000 respondents. Data collection took place in December 2020.

About Food, Agribusiness and Beverage at FleishmanHillard UK

Our cross functional team of brand marketers, retail and agriculture experts, ex-journalists, policy experts, issues and crisis practitioners, social innovators and data scientists have direct experience of working with high profile companies and organisations across the entire food, agribusiness and beverage supply chain. We deliver meaningful results through creative communications campaigns, based on strong, insightful, data-led understanding of your key audiences. Please come and talk to us about the change you would like to see.

In summary




WE ARE UNITED IN OUR VIEW THAT THE PANDEMIC HAS HAD THE GREATEST IMPACT ON OUR OVERALL PURCHASING AND CONSUMPTION HABITS IN THE PAST YEAR.

60% of people considered coronavirus having the biggest impact on the food and drink they choose to purchase and consume, with Brexit and climate change tying for second place on 20% respectively.

WE ARE DIVIDED WHEN WE CONSIDER HOW EACH FORCE HAS INFLUENCED THE FACTORS GOVERNING OUR DECISION TO PURCHASE.

We asked the public to rank a range of eight factors they consider when buying food and drink products with Brexit, climate change and coronavirus in mind. While food safety was a top priority across all three forces, the public ranked food availability and food sustainability differently depending on whether they were talking about climate change or not.





WE ARE OFTEN DIVIDED **WHEN IT COMES TO HOW** **MUCH BUYING LOCALLY,** **BUYING SAFELY AND BUYING** **SUSTAINABLY MATTERS TO** **US AS INDIVIDUALS.**

Attitudes vary depending on whether we are talking about coronavirus, Brexit or climate change, and they also vary depending on our age, our ethnicity and where we live across the country. For example, older people (65+) are most concerned to know that their food is safe to consume; BAME communities are most concerned to have a wide variety of available foods; people living in Scotland are most concerned to buy sustainably; and, perhaps unsurprisingly, Leave voters are most concerned about buying British.



WE ARE UNITED IN **OUR OUTLOOK THAT THE** **INDUSTRY HAS FURTHER TO** **GO IF IT IS TO REASSURE US** **THAT IT CAN NAVIGATE THESE** **THREE FORCES SUCCESSFULLY** **IN THE YEAR AHEAD.**

Just under half the respondents thought that the industry would address challenges and exploit opportunities presented by coronavirus in 2021. This percentage dropped to around a third when considering Brexit and climate change. But these three forces throw up difficult questions with few easy answers or solutions.

What we learned



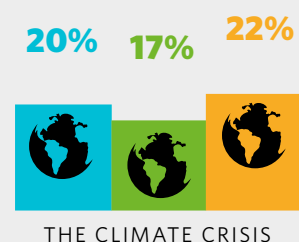
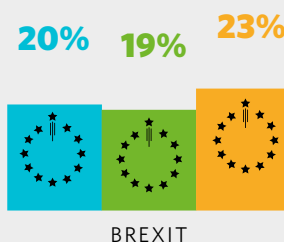
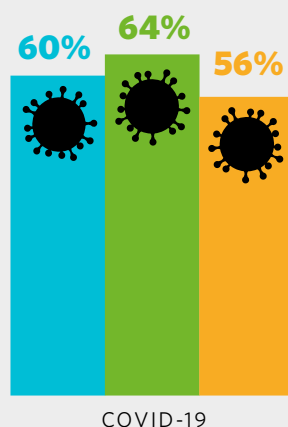
We are **UNITED** in our view that the pandemic has had the greatest impact on our overall purchasing and consumption habits in the past year.

60% of people considered coronavirus having the biggest impact on the food and drink they choose to purchase and consume, with Brexit and climate change tying for second place on 20% respectively.

It is perhaps unsurprising that the coronavirus pandemic has the most powerful impact on our outlook regarding food and drink. The first lockdown of 2020 forced many

of us to stop taking our food for granted as our shopping was curtailed. The number of people using food banks also reached record levels and those working in food retail were considered front line workers. While the shelves remained stocked as we ended the year, many of our respondents still voiced concerns that choice and variety would suffer because of the pandemic.

Which of the following three issues do you think has had the biggest impact on what food and drink products you choose to purchase? (Base: 2000)



As we battle to bring the virus under control, the number of people using food banks may well increase further over the course of this year as furlough ends and certain jobs no longer exist to return to. We have also seen calls for certain occupations in the food supply chain to receive vaccinations on a priority basis once the most vulnerable groups of our society have been inoculated.



“ Relying on online shopping, not being able to select my own fruit and vegetables.”

MALE, 65+, WEST MIDLANDS



“ Thinking of other people. Not over buying on things not really needed.”

FEMALE, 18-24, SOUTH WEST



“ Like to know what part of the world the products have come from and how Covid-19 has affected that part of the world and what measures that country has taken to counter the pandemic, otherwise I do not purchase if I think there is a danger of Covid-19 being present.”

MALE, 65+, EAST OF ENGLAND

What this means for communications:

The pandemic means that our priorities are very much focused on the 'here and now'. Food and drink companies should continue to communicate in an inclusive way to show they are meeting people's everyday needs in a manner that authentically reflects their ethics, values and purpose.

In practice, this means continuing to find solutions to the altered routines we currently adopt in lockdown and the new routines we will start to establish as businesses and local communities learn to live with coronavirus. So we will continue to see pivots and hybrid business models from in-restaurant dining to providing restaurant meal kits deliveries; from creating at-home experiences with cocktail-making Zoom meetings or posting recipes online for an authentic-as-can-be homemade effort.



We are **DIVIDED** when we consider how each force has influenced the factors governing our decision to purchase.




We asked the public to rank a range of eight factors they consider when buying food and drink products with Brexit, climate change and coronavirus in mind (see table below).

People were quick to rank sustainability as paramount for climate change, but that priority diminished when considering Brexit and coronavirus.

In addition, concerns over availability were important for Brexit and coronavirus but were not considered a priority when thinking about climate change.

The safety of our food however remained a top priority across all three forces.

When considering the environment and climate change, what is most important to you as a consumer when buying food and drink products? (Base: 2000)

FACTOR / FORCE	 CORONAVIRUS	 BREXIT	 CLIMATE CHANGE
<i>I know that my product is safe to consume</i>	1 st	2 nd	2 nd
<i>I know that I have a wide choice of quality products at affordable prices</i>	2 nd	1 st	4 th
<i>I know that my product will always be available</i>	3 rd	4 th	8 th
<i>I know that my product will not become more expensive</i>	4 th	3 rd	7 th
<i>I know that my product is British</i>	5 th	5 th	5 th
<i>I know that staff and workforce are treated fairly</i>	6 th	8 th	6 th
<i>I know that my product is sustainable</i>	7 th	7 th	1 st
<i>I know where my product has come from</i>	8 th	6 th	3 rd



“ Whether it’s been prepared safely.”

FEMALE 18-24 SOUTH WEST



“ That packaging is at a minimum and can be recycled.”

FEMALE 18-24 SOUTH EAST



“ The product is fresh and has not been injected with anything different or chemicals.”

FEMALE 18-24 EAST MIDLANDS

What this means for communications:

Coronavirus, climate change and Brexit do not exist in silos. Solutions to tackle challenges in one area can present problems in another – food packaging is a favourite example – more packaging can help keep food hygienic and safe but the volume we produce is placing a strain on our ability to dispose of it sustainably. Businesses run the risk of sending out mixed messages to satisfy competing and conflicting concerns from their key audiences.

Businesses need to take a holistic view of their business practices and ensure they communicate coherently regarding these competing pressures. Communications can also help food and drink companies balance out these competing concerns – for example, educating and informing the public about how food science and technology can protect the planet while still ensuring our food and drink is safe to consume.

“ If the product is loose, I am worried other people have touched the product.”

FEMALE, 18-24, EAST MIDLANDS

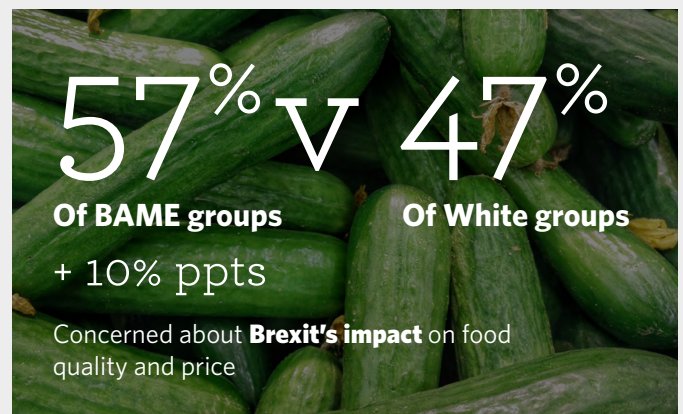
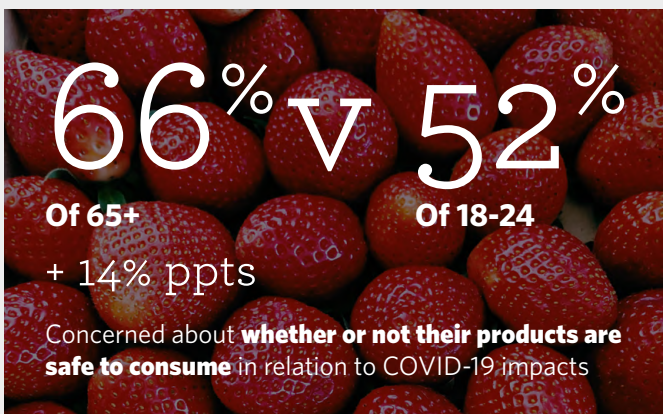




We are often **DIVIDED** when it comes to how much buying locally, buying safely and buying sustainably matters to us as individuals.

Attitudes vary depending on whether we are talking about coronavirus, Brexit or climate change, and they also vary depending on our age, our ethnicity and where we live across the country. For example, older people (65+) are most concerned to know that their food is safe to consume; BAME communities are most concerned to have a wide variety of available foods; people living in Scotland are most concerned to buy sustainably; and, perhaps unsurprisingly, Leave voters are most concerned to buy British.

When considering the COVID-19 pandemic / Brexit / the environment and climate change, what is most important to you as a consumer when buying food and drink products? (Base: 2000)



Despite these differences, there were also important areas of common ground. For example, it is a common misconception that the more 'middle-class' you are the more you care about the environment. Our research shows that both higher and lower socio-economic groups placed sustainability first in factors governing their purchasing decisions of food and drink.

“How sustainable is the product and what damage does it do to the planet, packaging included.”

MALE, 25-34, EAST OF ENGLAND, ABC1



“That good farming practices & animal husbandry are maintained. I've been looking at a more plant-based diet but have concerns about soil depletion.”

FEMALE, 55-64, NORTH EAST, ABC1

“Sustainable and the source of where the product has come from.”

FEMALE 55-64, LONDON, C2DE



“I have to take more notice of where goods come from and the environmental impact of producing and obtaining them.”

FEMALE, 65+, SOUTH EAST, C2DE



What this means for communications:

As we seek to rebuild our economies and communities in the shadow of the pandemic, we are also pushing for the right to govern our own affairs in national and mayoral elections and are forging new trading and climate change relationships.

Now that the UK is outside the EU, there is a huge opportunity for food and drink companies to take the initiative, define new agendas and celebrate diversity of opinion in the UK in ways that unite us rather than divide us.

In doing so, businesses can set out new ways to engage the public around the affordability and quality of local produce for example or showcase ways in which they are helping to promote the greening of the UK economy through investments in technology and skills.

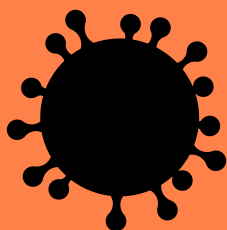


We are **UNITED** in our outlook that the industry has further to go if it is to reassure us that it can navigate these three forces successfully in the year ahead.

Just under half the respondents thought that the industry would address challenges and exploit opportunities presented by coronavirus in 2021. This percentage dropped to around a third when considering Brexit and climate change. But these three forces throw up difficult questions with few easy answers or solutions.

How confident or not are you that the food and drink industry will address challenges and exploit opportunities presented by these three issues in 2021? (Base: 2000)

COVID-19



45% CONFIDENT

27% NEUTRAL

22% NOT CONFIDENT

Brexit



31% CONFIDENT

27% NEUTRAL

36% NOT CONFIDENT

Climate Change



36% CONFIDENT

31% NEUTRAL

26% NOT CONFIDENT



Our survey results reflect the VUCA (volatile, uncertain, complex, ambiguous) times in which we are living.

While the vaccine roll-out programme might allow politicians to talk up our prospects of national recovery and revival, there is no disputing the fact that the coronavirus has left deep scars in our economy and local communities. While we may have a trade deal with the EU, the new trading arrangements have yet to be fully tested with the Government openly admitting to 'a few bumps in the road' as the changes take effect. Finally, while the UK may be hosting a global climate change summit at the end of the year, we remain unclear about how much progress we are making to resolve the problem.

“As we have lost one job in our house due to Covid-19 the main influence for me is price.”

FEMALE, 35-44, YORKSHIRE AND THE HUMBER



“That the prices don't shoot up high and we don't have any shortages with bulk buying.”

FEMALE, 55-64, NORTH EAST

What this means for communications:

Industry rhetoric will no longer 'cut the mustard' with a public that is increasingly used to seeing action happen at scale over short time frames. If it is possible to develop a vaccine in one year rather than ten, then why can't the food and drink industry accelerate delivery against its own sustainability targets? If it is possible to pivot the UK's retail economy online, then how should food and drink businesses contribute to help struggling communities and businesses offline?

Businesses in the food and drink sector will only manage and deliver against these expectations if they work more closely in partnership with a wider range of actors. 'Going it alone' will only perpetuate a winners vs. losers dynamic. If businesses look to cultivate frameworks involving NGOs, regulators and investors then this might help to foster greater ambitions and a greater sense of collective urgency and responsibility in delivering against them.



In conclusion

Almost 2000 years ago, Epictetus said 'It's not what happens to you, it's how you react to it that matters'. While many in the food and drink industry might be forgiven for feeling a little under siege over the past couple of years, they also remain the architect of their own destiny.

Our analysis has set out four clear ways in which communications plays an essential part in helping companies and organisations navigate these forces, promoting and protecting their brand reputation and corporate licence to operate as they address the most urgent issues of our times.





KEEP IN TOUCH

Please share your thoughts, join in the debate on our social channels, or get in touch with us to learn more about our work and outlook on these important issues.

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