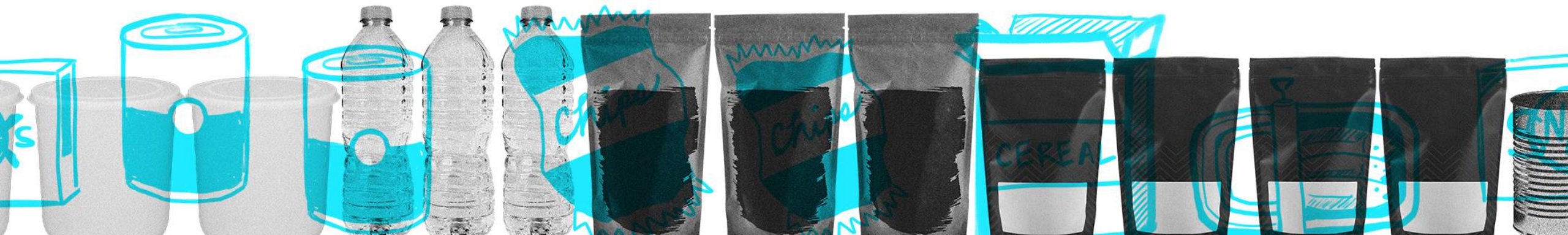
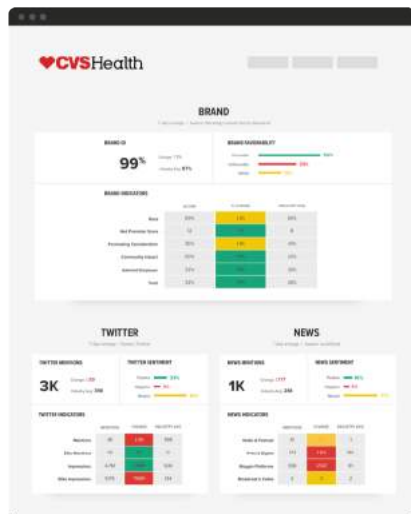


CONSUMER TRENDS IN
***THE FOOD AND
BEVERAGE INDUSTRY***

 MORNING CONSULT



About Morning Consult



What consumers **THINK**

Collecting over 3 million market research interviews



What consumers **SAY**

Evaluating over 100 million social media posts



What consumers **SEE**

Analyzing over 85,000 news media outlets

Currently Tracking **1,700+** Brands (200 interviews per day, per brand)
Including Nearly 300 Brands Related to the Food and Beverage Industry:



What's in the report

Methodology: This poll was conducted from May 07-11, 2018, among a national sample of 2,201 adults. Results from the full survey have a margin of error of plus or minus 2 percentage points.



**Online Versus
In-Store
Shopping
Habits**



**Purchasing
Considerations**



**Product
Labeling**

PLUS: See the top 10 most loved food and beverage brands in America on slide 26. This is part of our new report: **Tracking America's Largest Food and Beverage Brands**. [Download here.](#)

Key Insights

A quick glance at
some of the most
important findings

1. Most Americans who aren't shopping online don't plan on doing so in the future.

Sixty-five percent of consumers who say they've never purchased food or beverage products online say they also have no plans to in the future, regardless of advancements. Why? Most cite a general preference for shopping in person.

2. Brand name is the most important purchasing consideration.

When asked whether they would be willing to pay extra for a range of factors, brand name was the most commonly chosen option. Brand name matters most for drink products like soda and coffee.

3. "Fresh" is the most appealing term to label a product with, while vegan is the least.

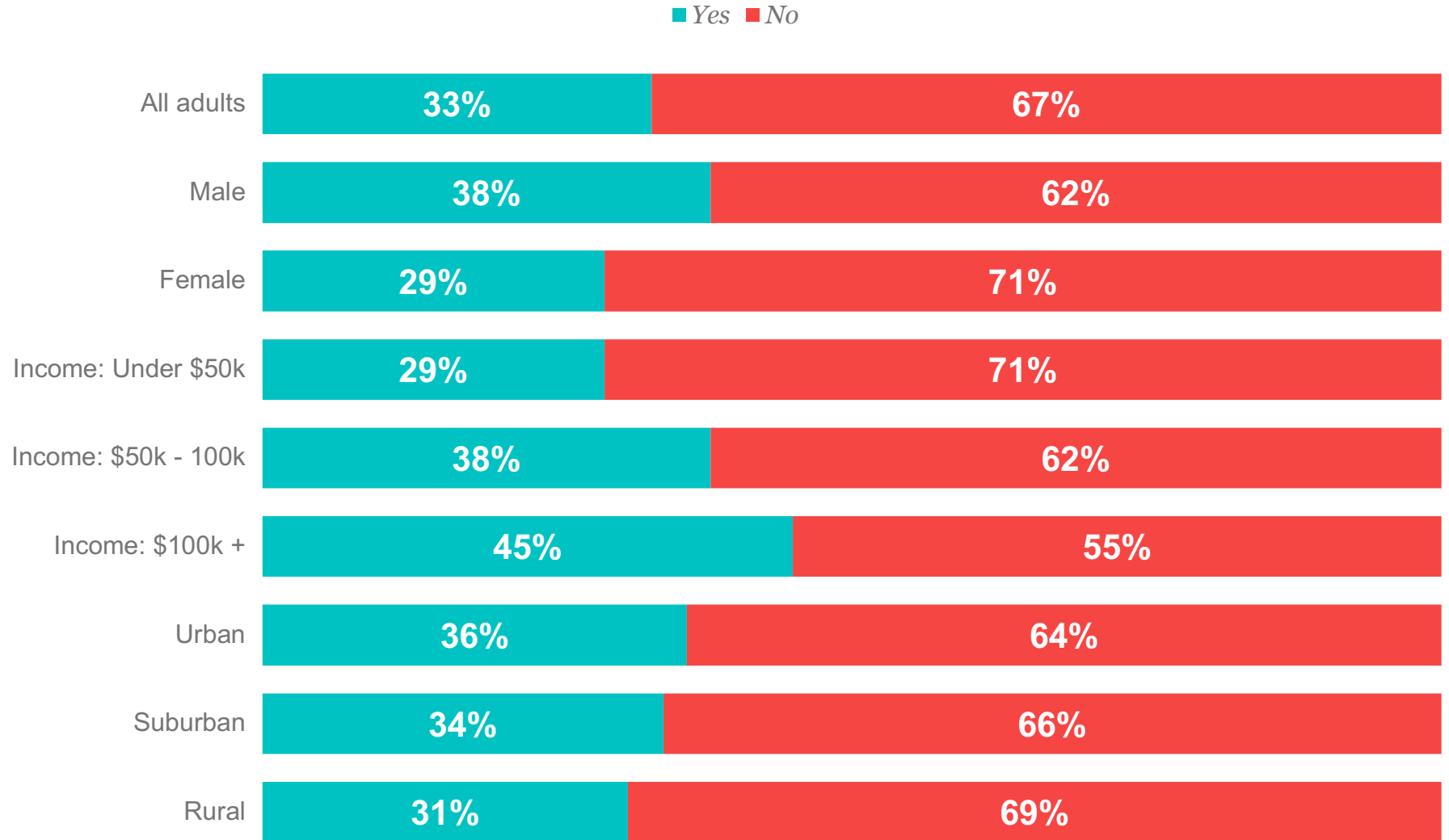
Eighty-one percent of Americans say that a food or beverage product would be more appealing to them if they say "fresh" on the labels. This holds true across a wide range of demographic groups. Just 17% say "vegan" makes a product more appealing.



**ONLINE V. IN-STORE
SHOPPING HABITS**

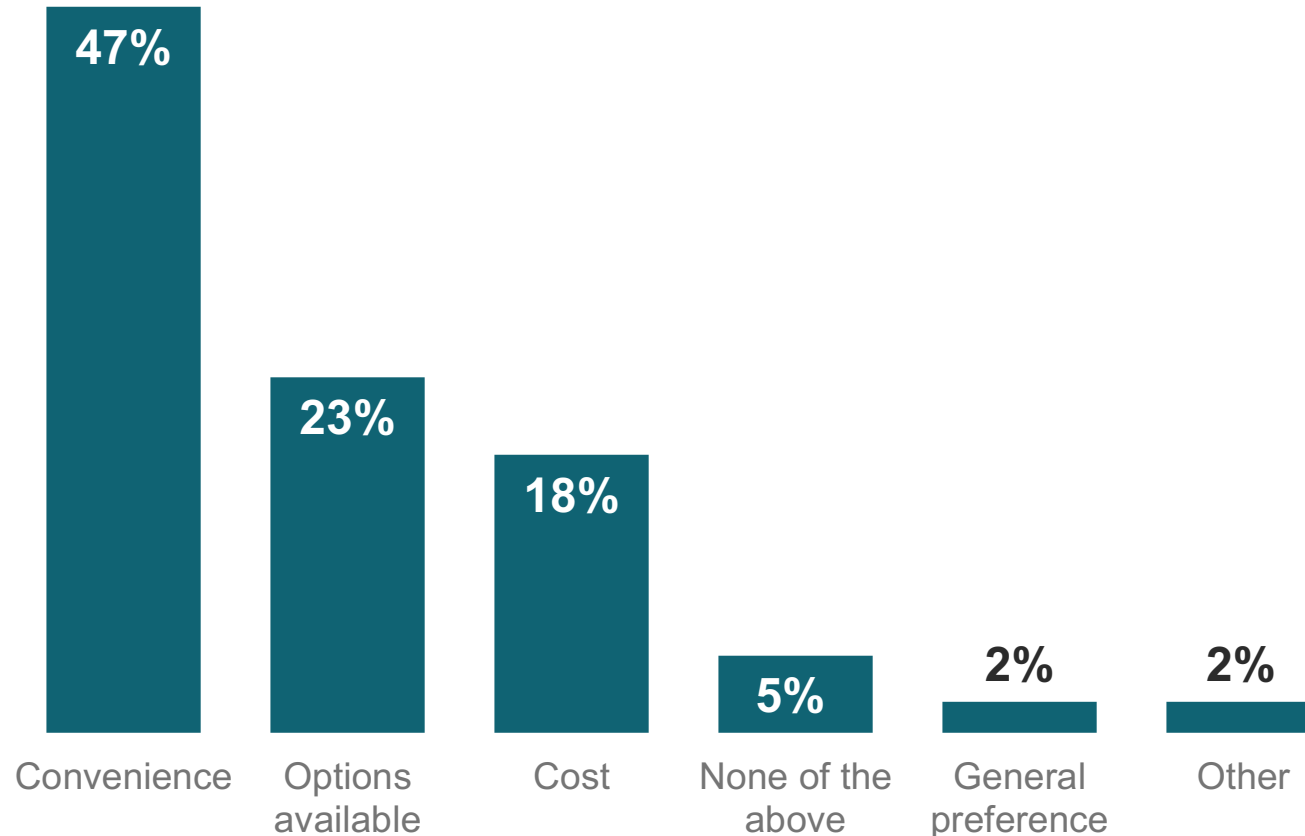
Men, high
income earners
more likely to
have purchased
food or
beverage
products online

Have you ever purchased packaged food or beverage products online?



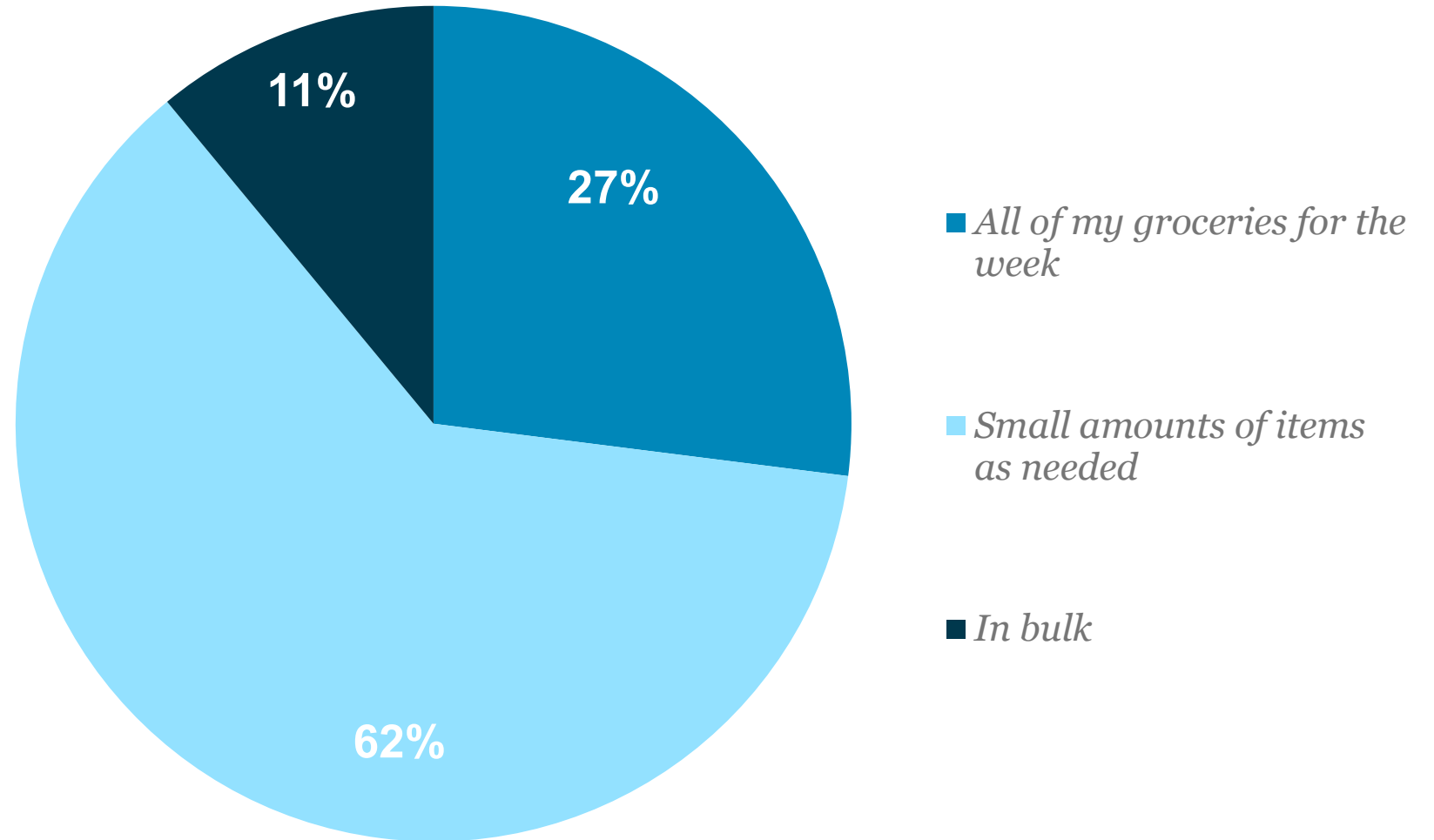
A plurality of those who have shopped online say they did so because of convenience

What is the primary reason you purchase packaged food or beverage products online, as opposed to in an in-person location?



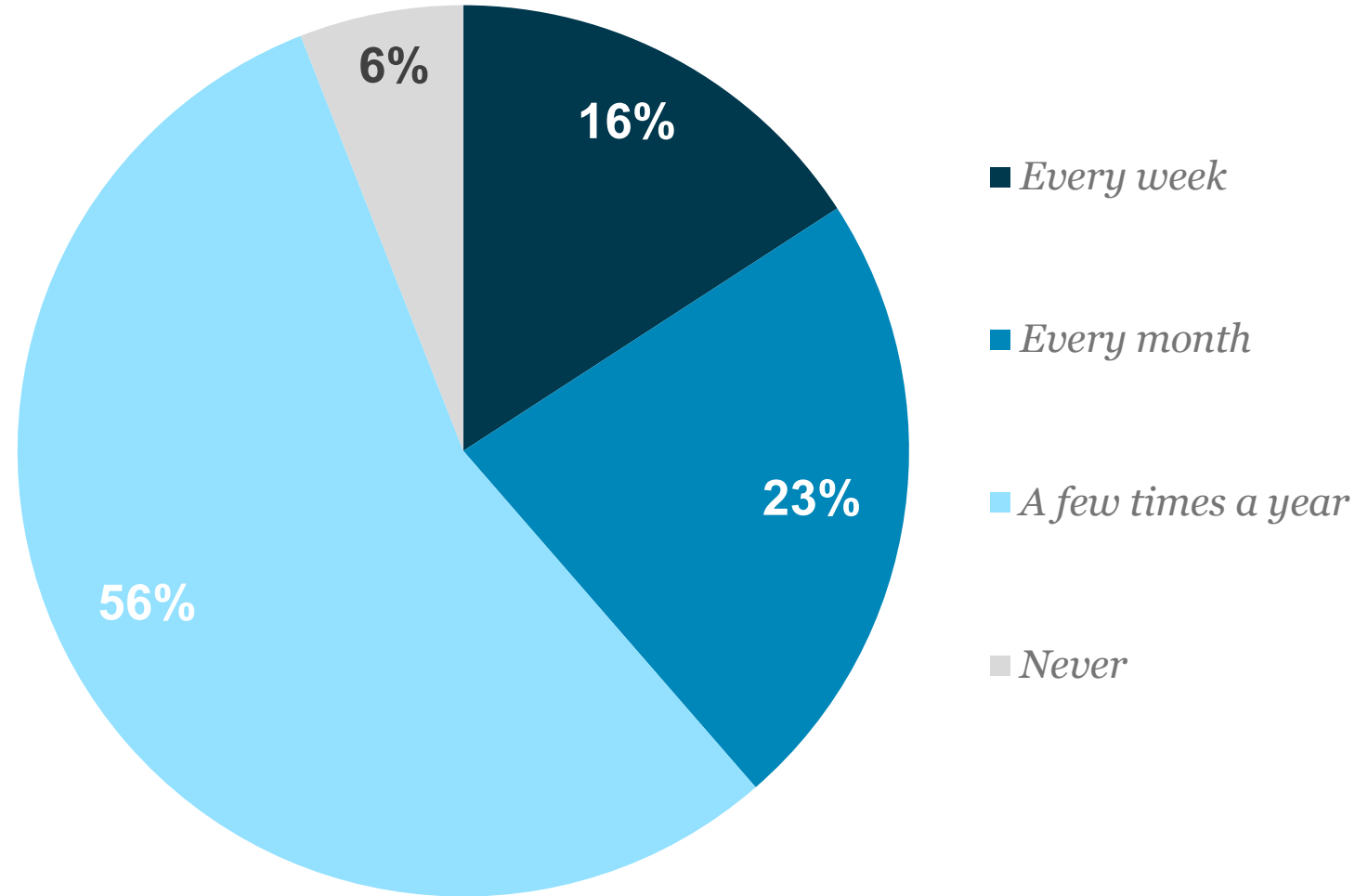
The average
online food
shopper
buys a small
number of
items as
needed

When you purchase packaged food or beverage products online, do you typically purchase:



Among
online
shoppers,
few make
weekly
purchases

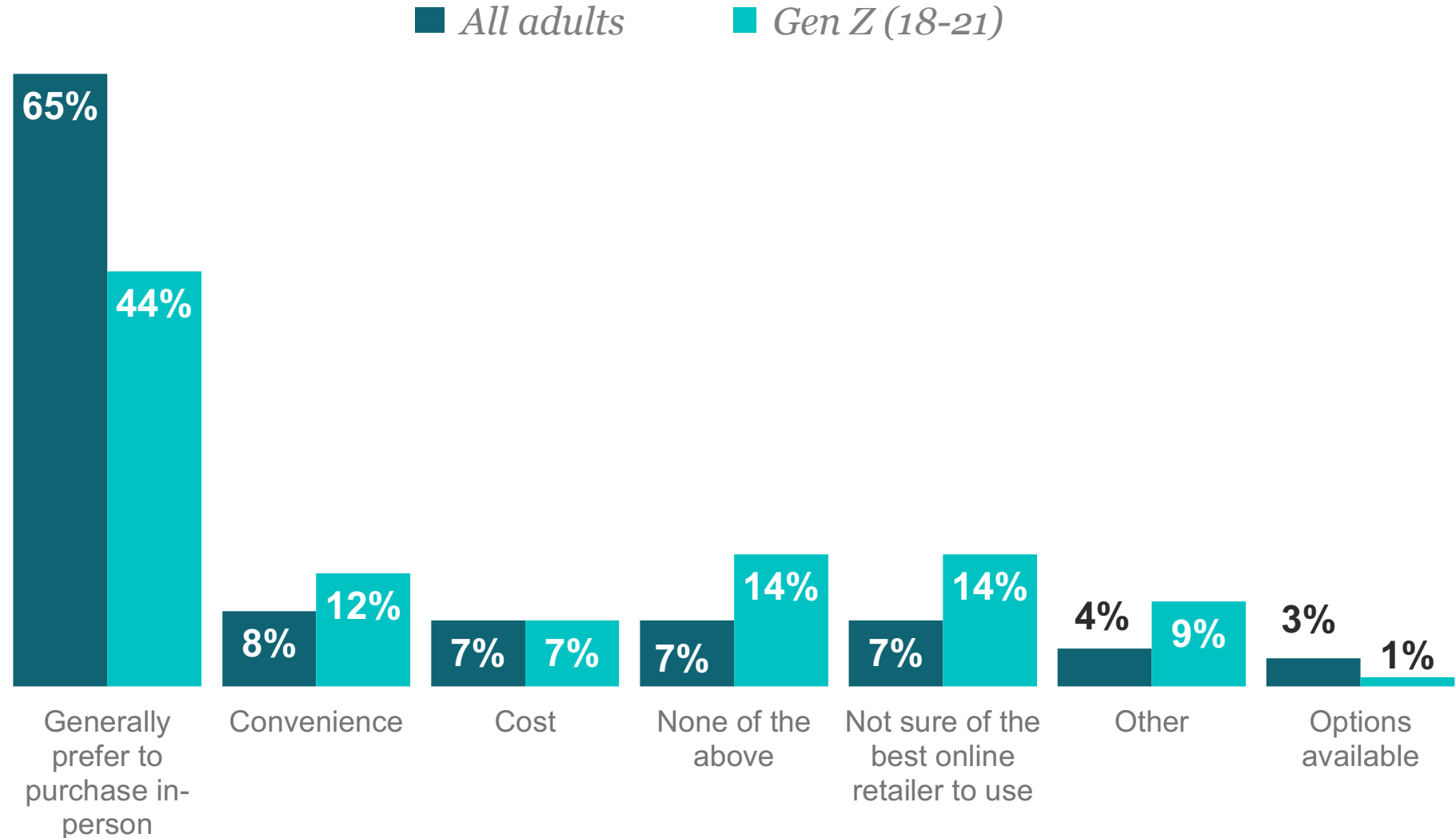
How often do you purchase packaged food or beverage products online?



Those who
haven't
shopped
online
consider it a
general
preference

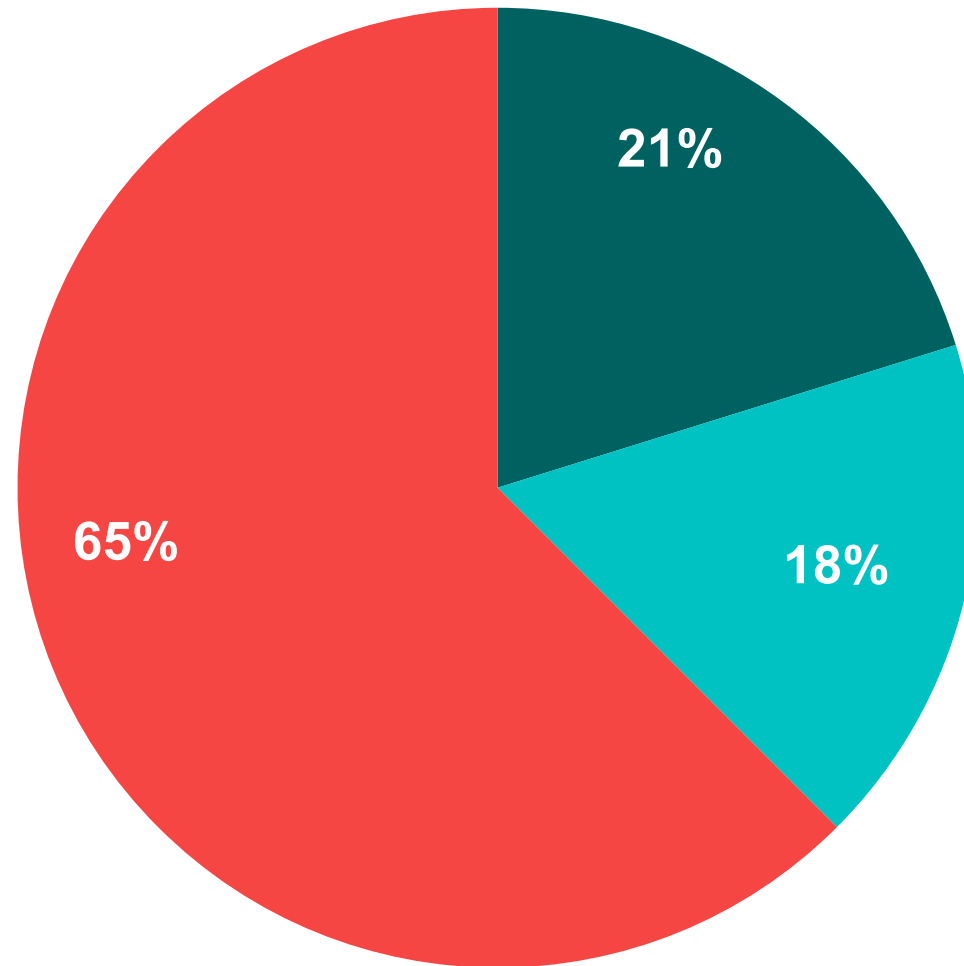
However, 18-21
year-olds are less
likely to cite a
preference for in-
store shopping

What is the primary reason you have NOT purchased packaged food or beverage products online in the past?



**Most
Americans
who haven't
bought
groceries
online have
no interest in
doing so**

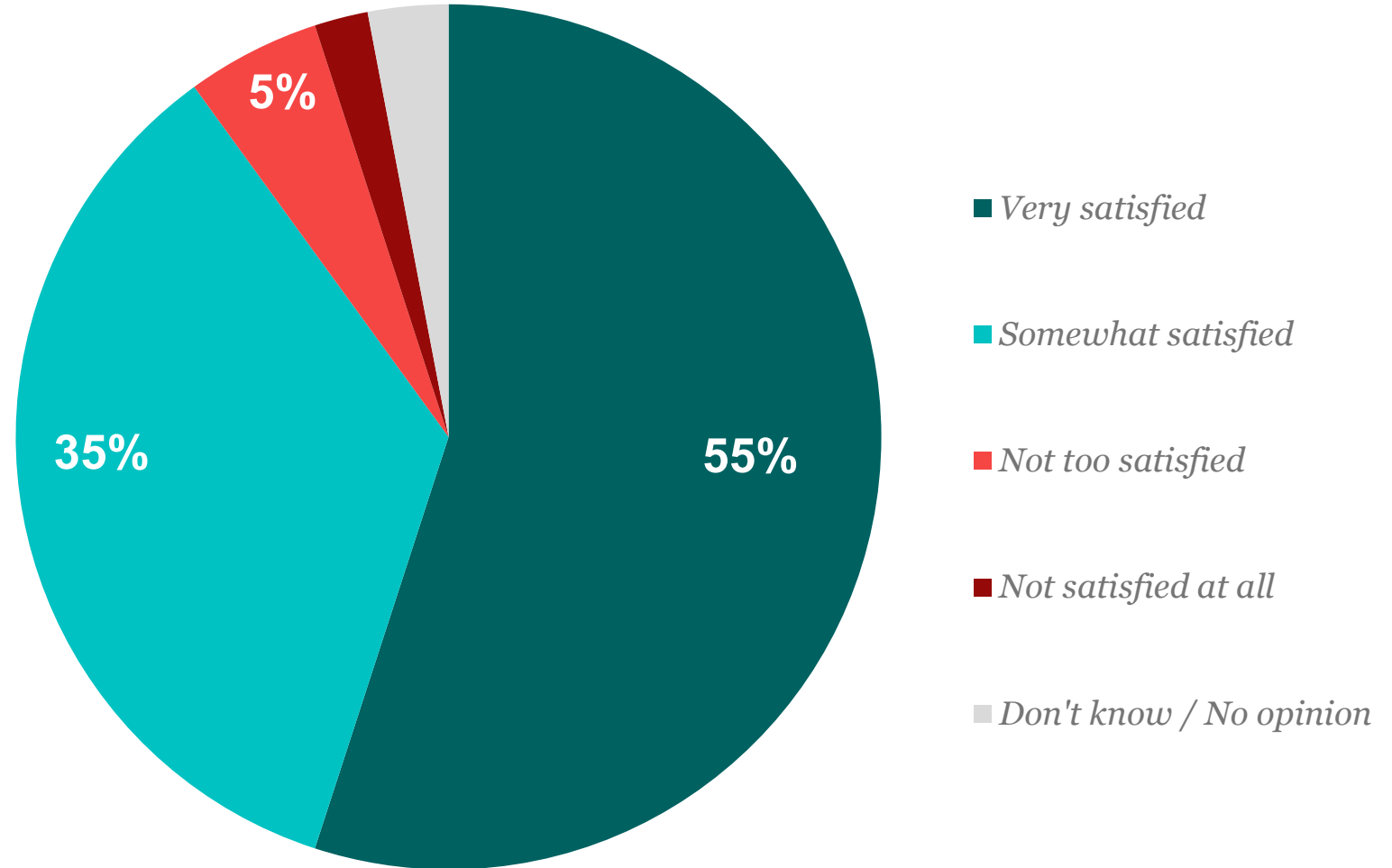
Which of the following comes closest to your views, even if none are exactly right?



- *I am currently open to buying food and beverage products online, I just haven't*
- *I would be open to buying food and beverage products online in the future, once the options to do so improve*
- *I don't have any interest in buying food and beverage products online*

**Most
Americans
are satisfied
with their
nearby
grocery
options**

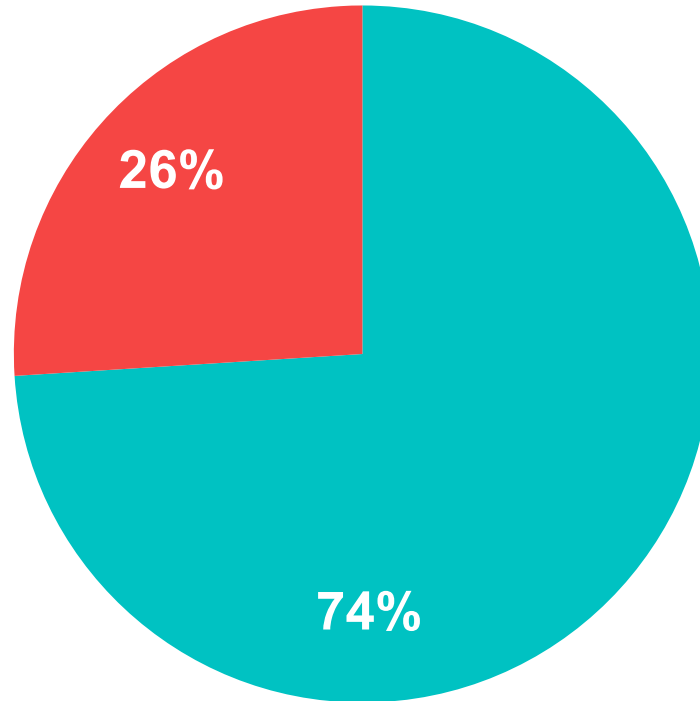
How satisfied are you with the grocery store options near you?



Consumers
who've
purchased
food online
more likely
to enjoy
shopping

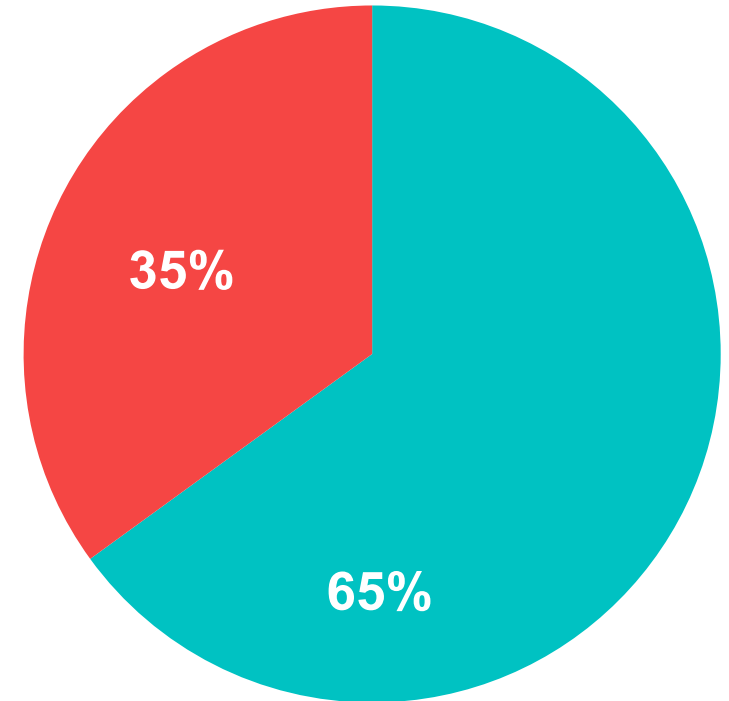
Generally, would you say that you enjoy shopping for groceries?

Consumers that have purchased food and beverage products online before



■ Yes ■ No

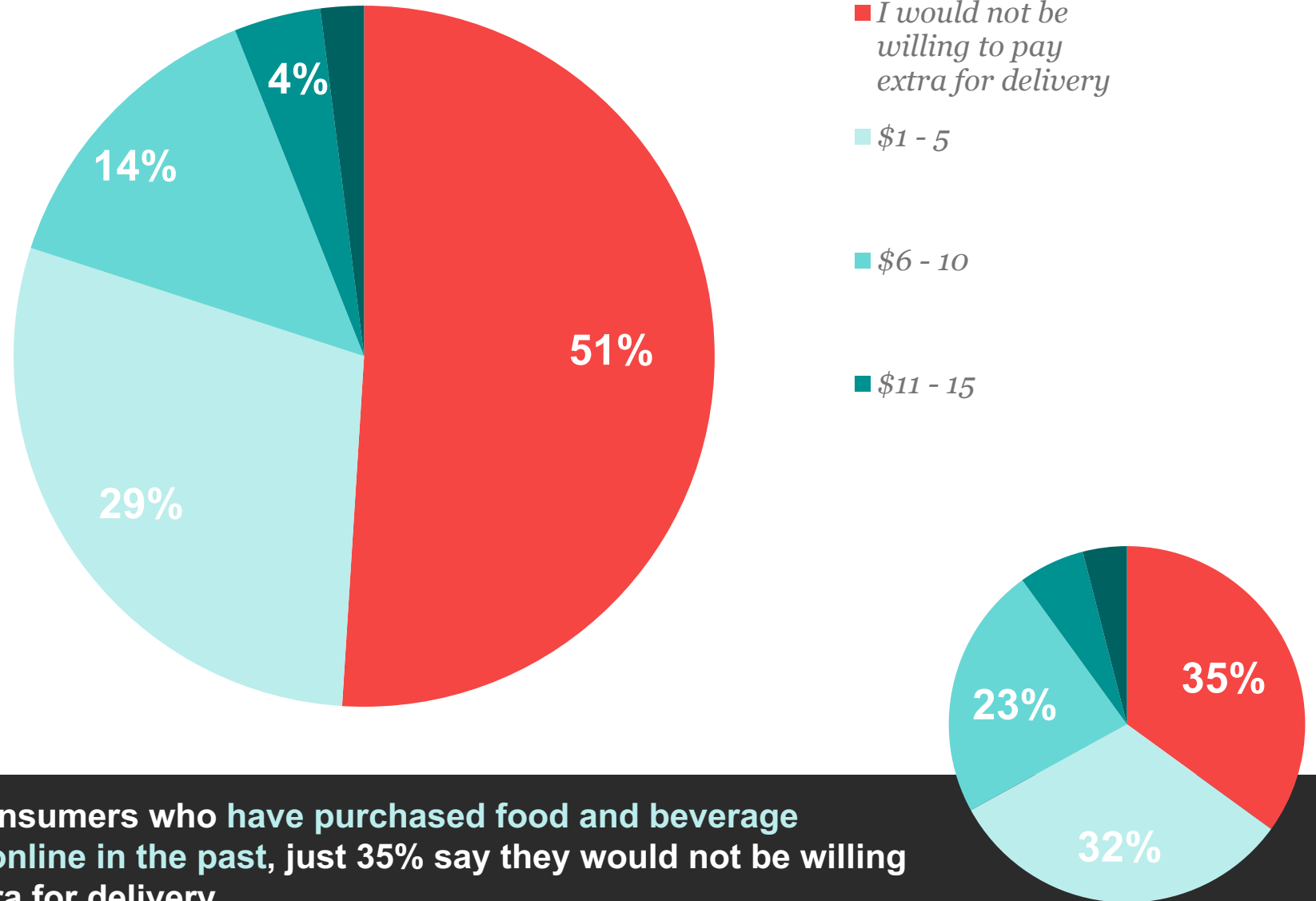
Consumers that have never purchased food and beverage products online



■ Yes ■ No

20% of
Americans
are willing to
pay more
than \$5 on
grocery
delivery

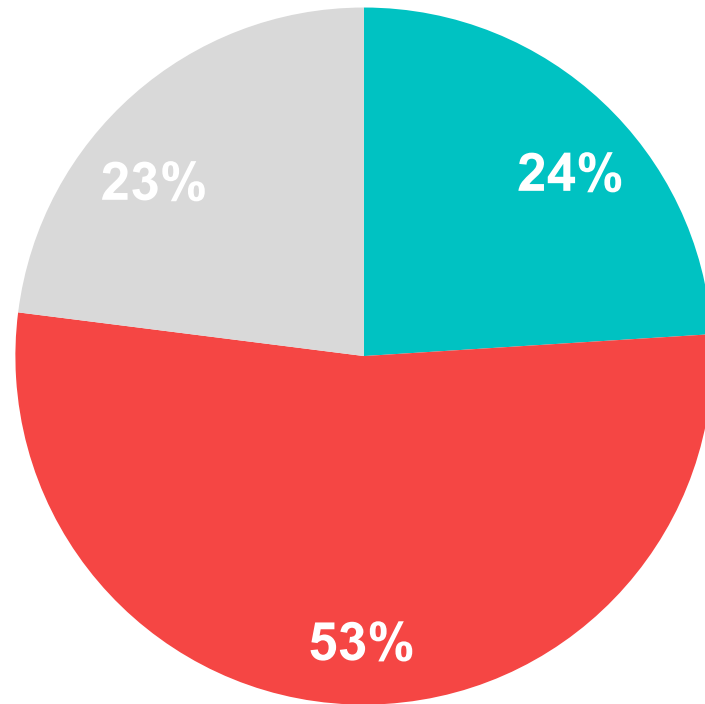
How much would you be willing to pay in order to have groceries delivered to your place of residence?



Among consumers who have purchased food and beverage products online in the past, just 35% say they would not be willing to pay extra for delivery.

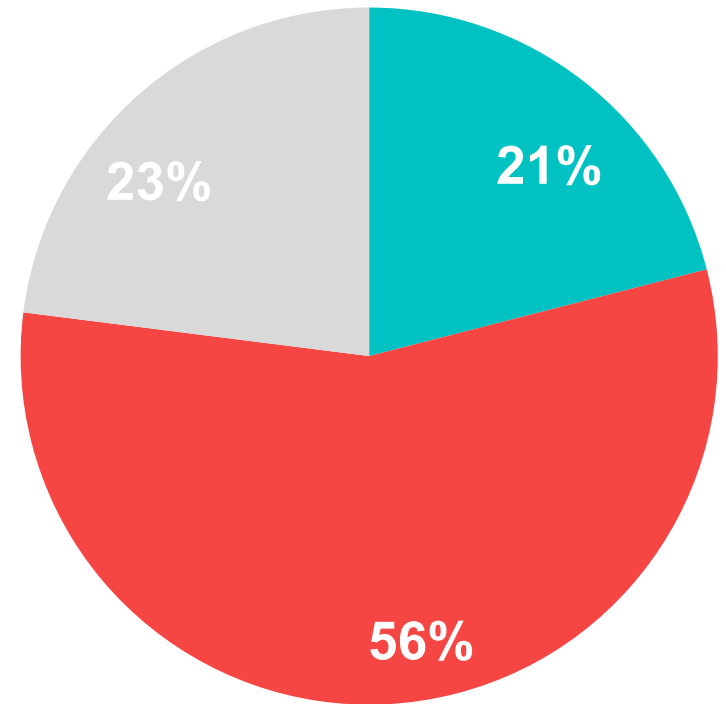
About a
quarter of
Americans
would
consider a
subscription
service

Would you consider paying for a subscription service for a food or beverage product that **you buy often** to be delivered to your place of residence?



■ Yes ■ No ■ Don't know / No opinion

Would you consider paying for a subscription service for a **variety of curated** food or beverage products to be delivered to your place of residence?



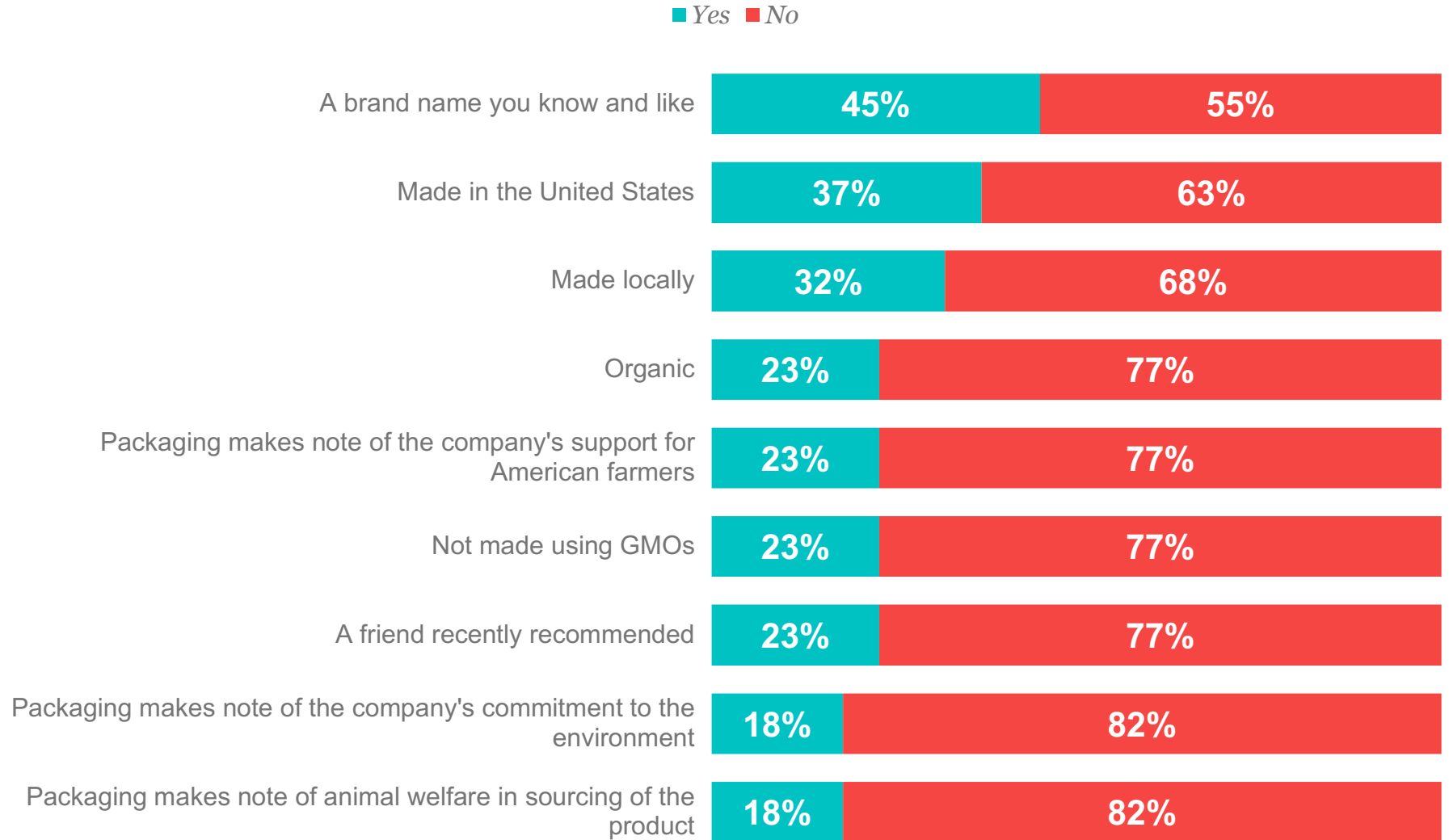
■ Yes ■ No ■ Don't know / No opinion



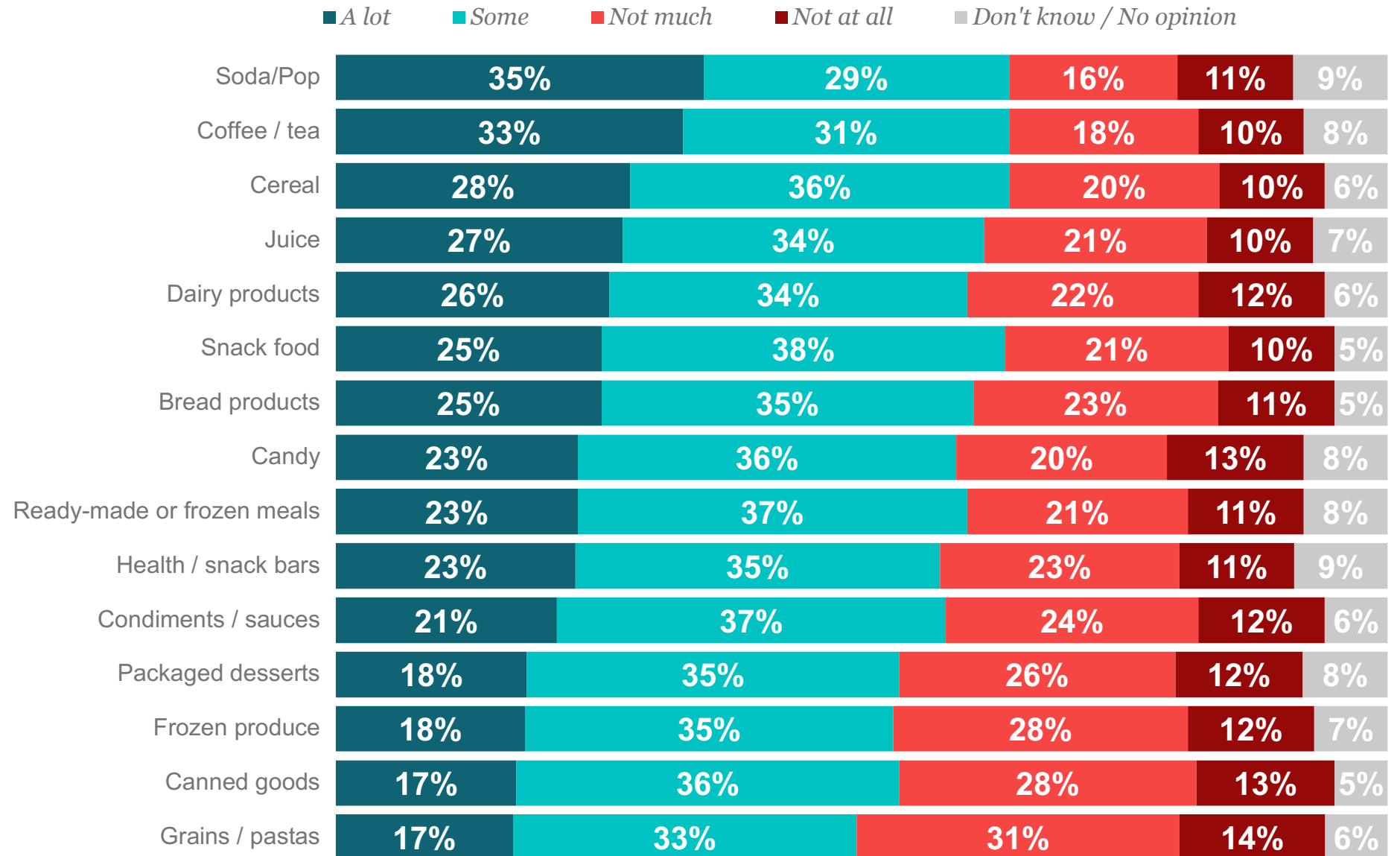
**PURCHASING
CONSIDERATION**

Brand name is the factor consumers would most be willing to pay extra for

Consider the following scenario: You are shopping for a small grocery item that you need that costs \$5. You see an alternative that costs \$0.50 more. Under what circumstances would you be willing to pay an extra?



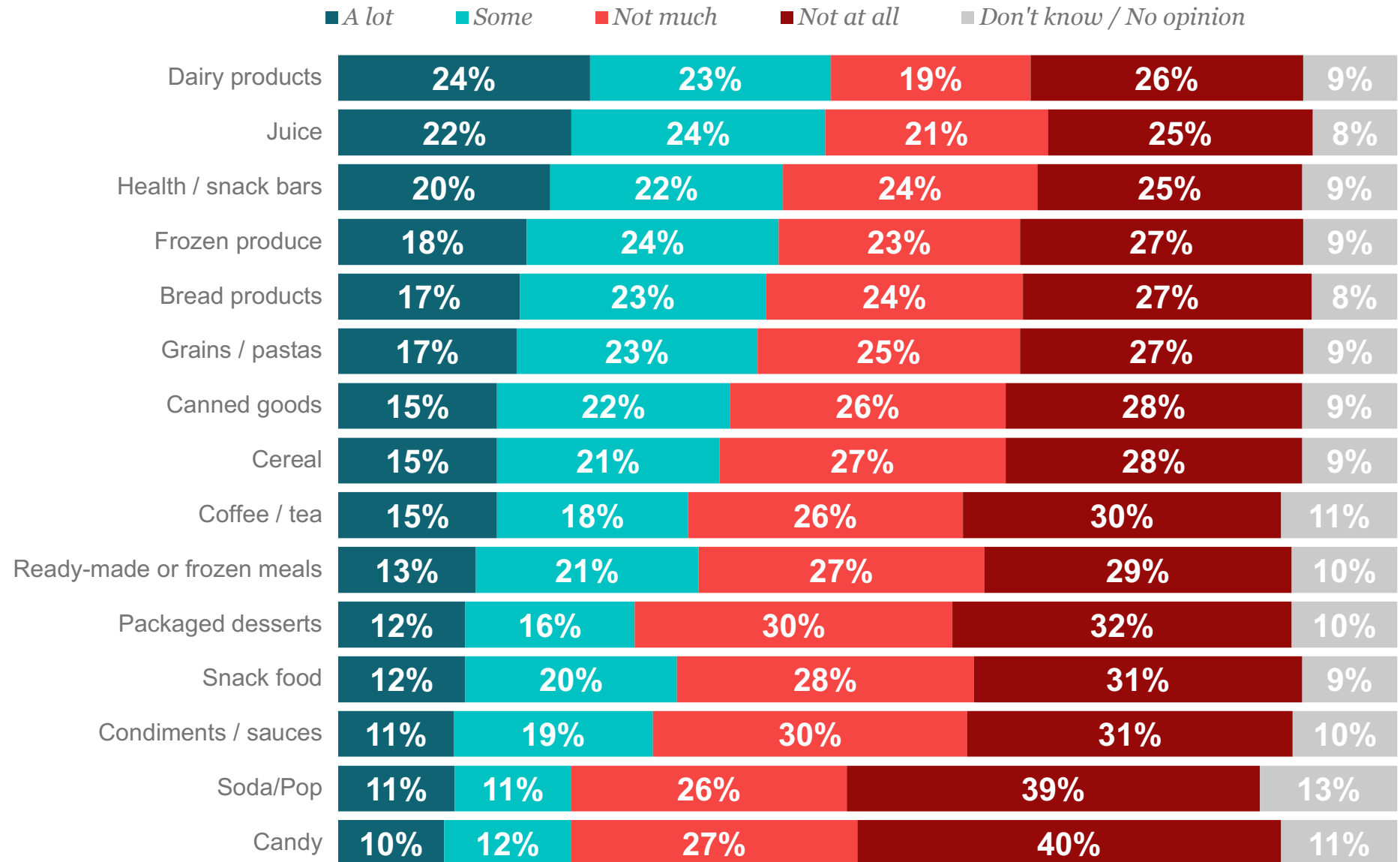
How much does name brand matter when shopping for each of the following?



The products for which brand name matters most

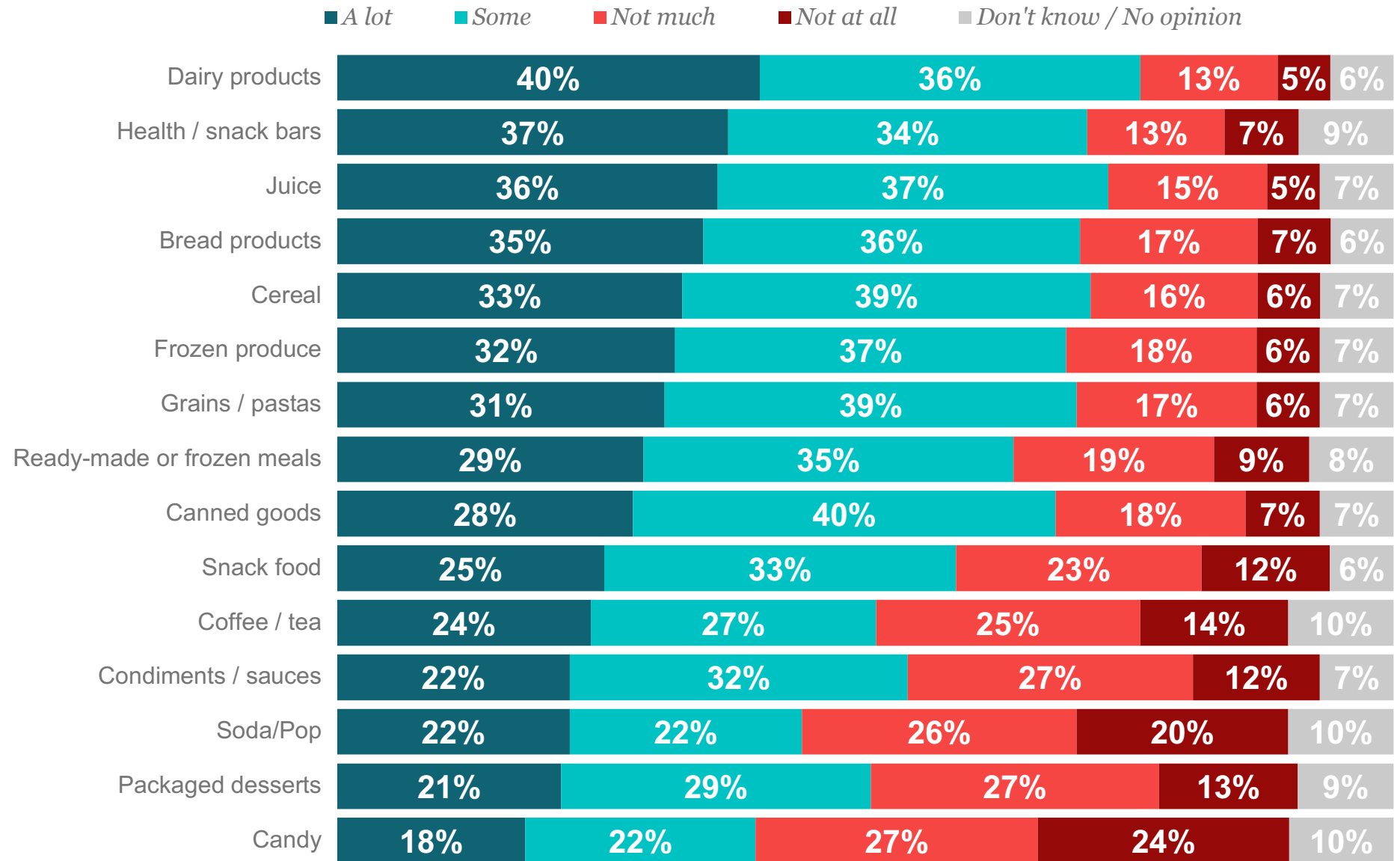
The products for
which being
organic matters
most

How much does it matter that a product is organic when shopping for each of the following?



The products for which nutrition/health matters most

How much does nutrition/health factors matter when shopping for each of the following?

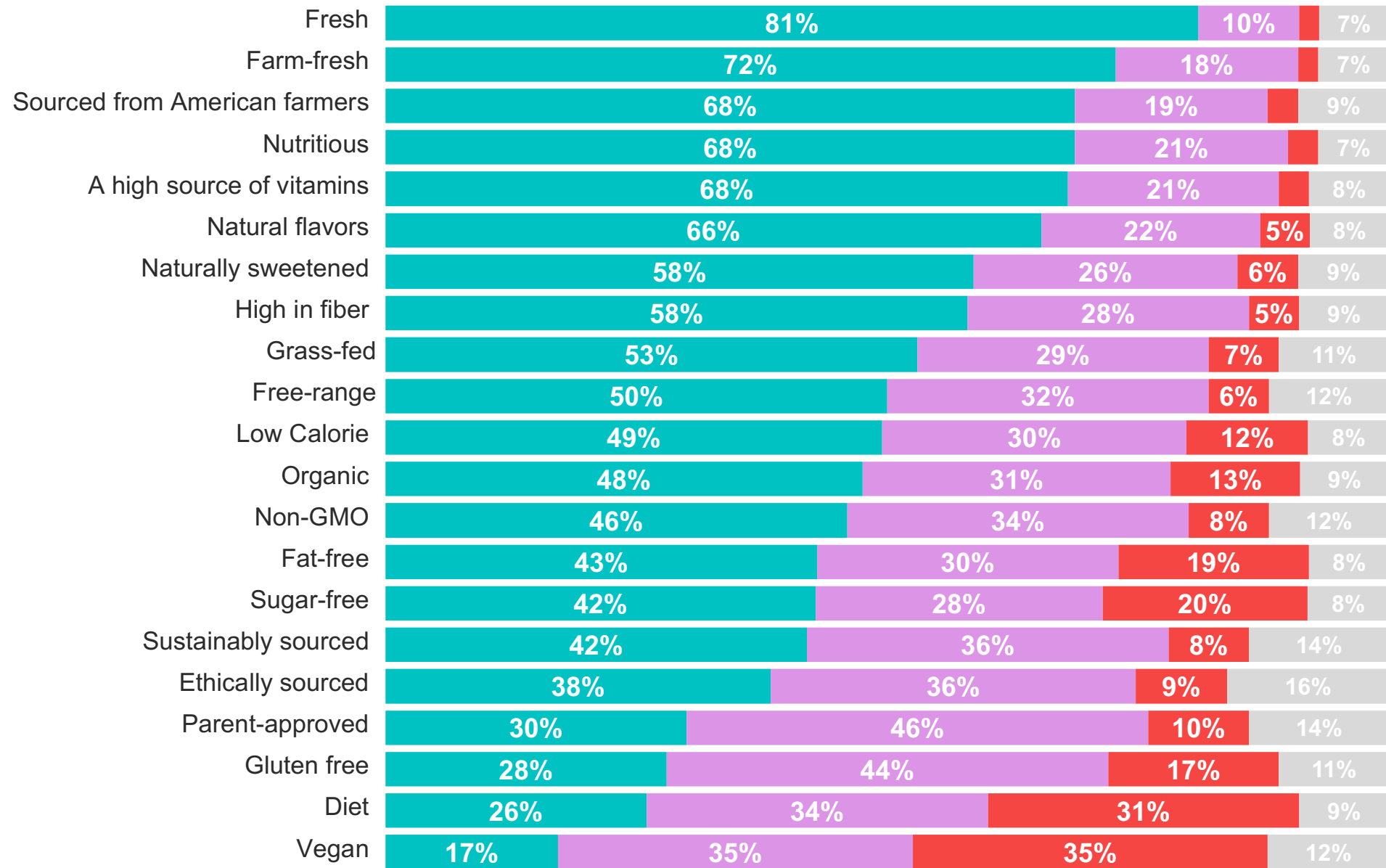




PRODUCT LABELING

Do each of the following words or phrases, commonly found on food or beverage products, make you more or less likely to buy the product?

■ More appealing
 ■ Neither more nor less appealing
 ■ Less appealing
 ■ Don't know / No opinion



The label terms that are most and least appealing to consumers

Notable demographic trends on food labels

A quick glance at some of the most interesting findings

Everyone likes the terms “fresh” and “farm-fresh”

Across the board – young, old, liberal, conservative, wealthy, poor – these terms are viewed overwhelmingly positively.

Younger generations care more about organic products

Fifty-four percent of Americans aged 18-29 say a product labeled organic would be more appealing, compared to 37 percent of those 65 or older.

Trump voters care more if products sourced from American farmers

Seventy-eight percent of Trump voters say a product is more appealing with this label, compared to 68% of Clinton voters.

Vegan products more appealing to younger Americans

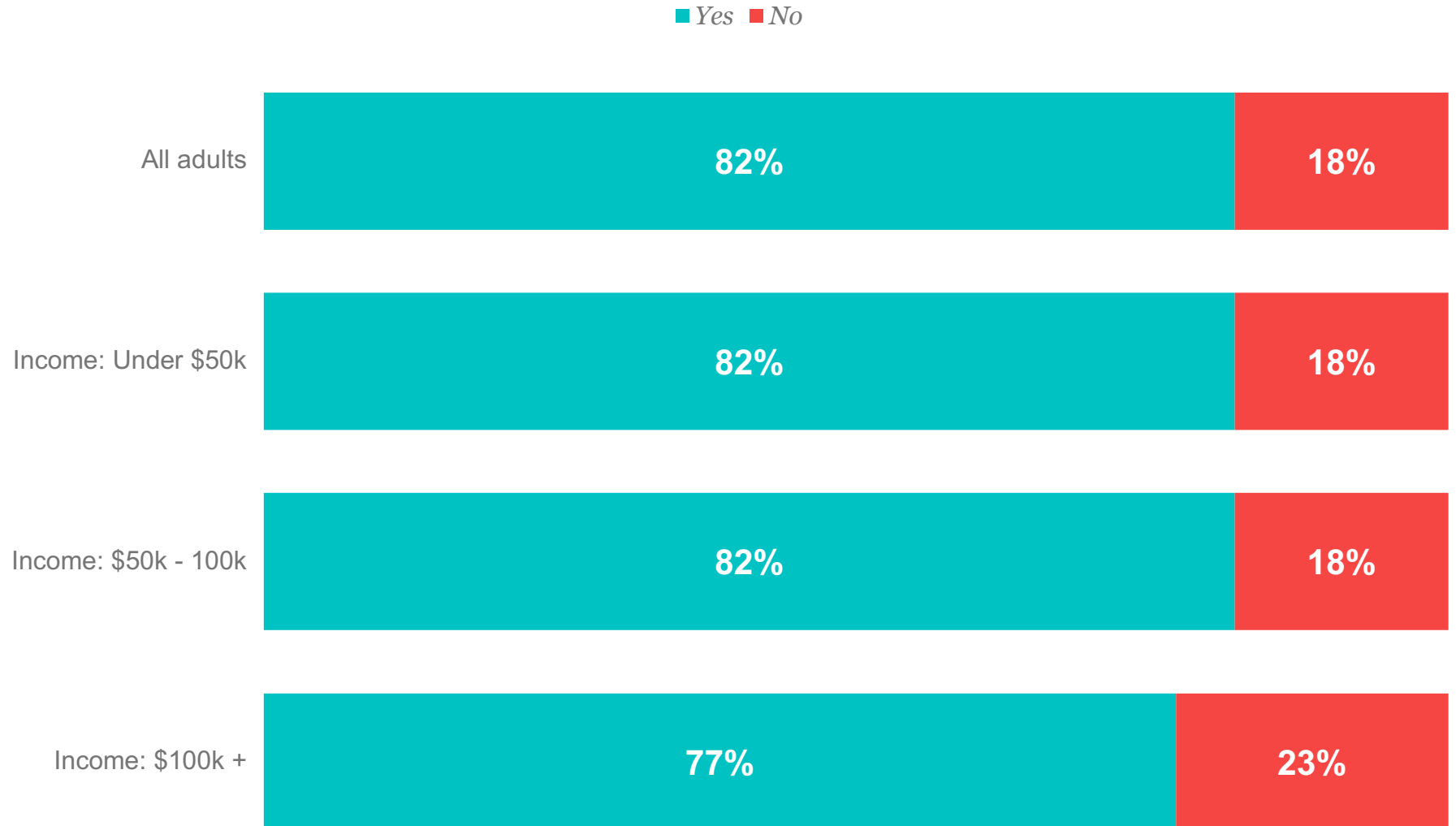
Twenty-nine percent of Gen Z adults (18-21 year-olds) say the word vegan would make a product more appealing. Just 14 percent of Boomers say the same.

No partisan divide on GMOs

Forty-eight percent of Democrats say a product would be more appealing if it was non-GMO, while 47 percent of Republicans say the same.

Few Americans unwilling to purchase cheaper generic products

Do you ever purchase generic products when they are cheaper than name brand alternatives?



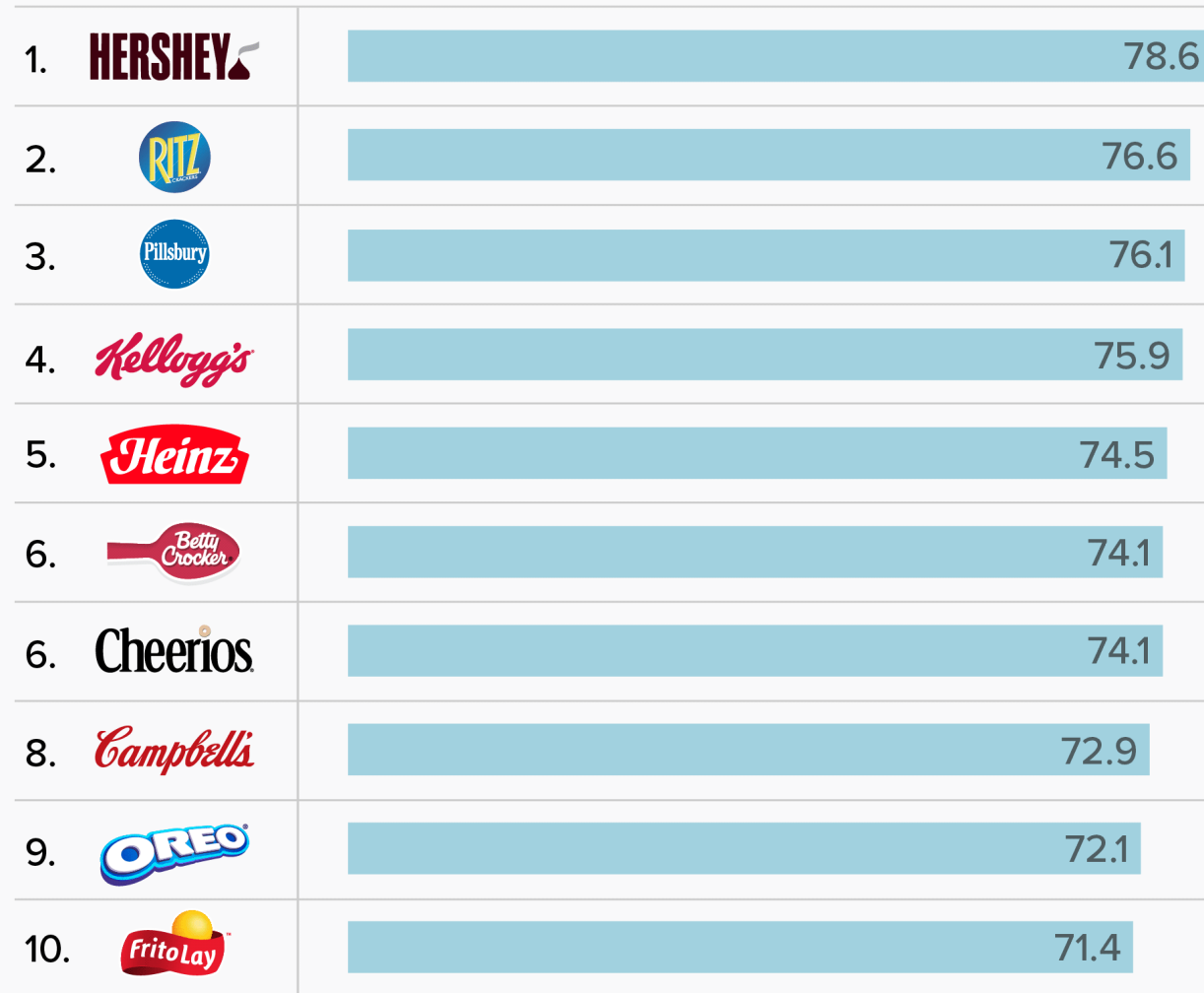
The following slides contain a preview of Morning Consult's latest report:



[DOWNLOAD NOW](#)

The 10 most popular packaged food and beverage brands and products among all adults

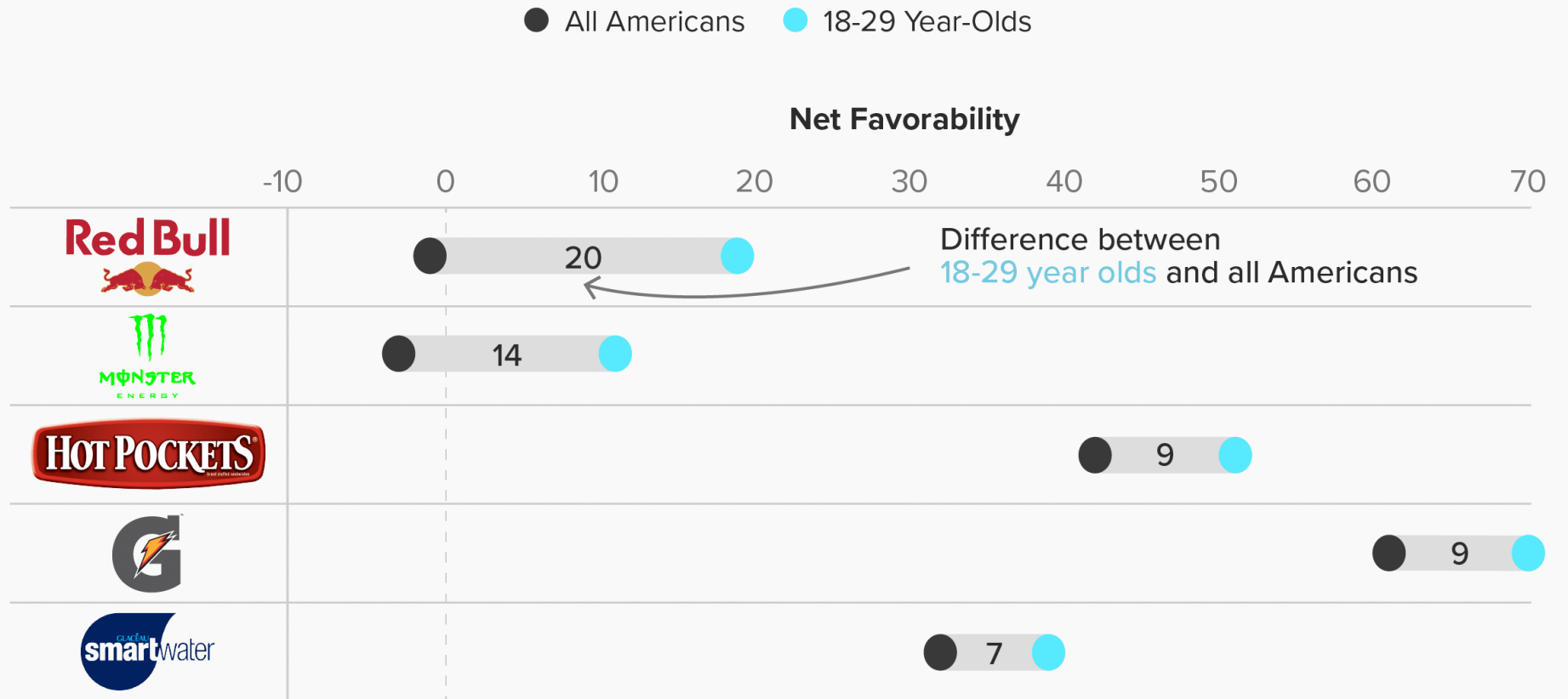
Ordered by net favorability (favorable minus unfavorable)

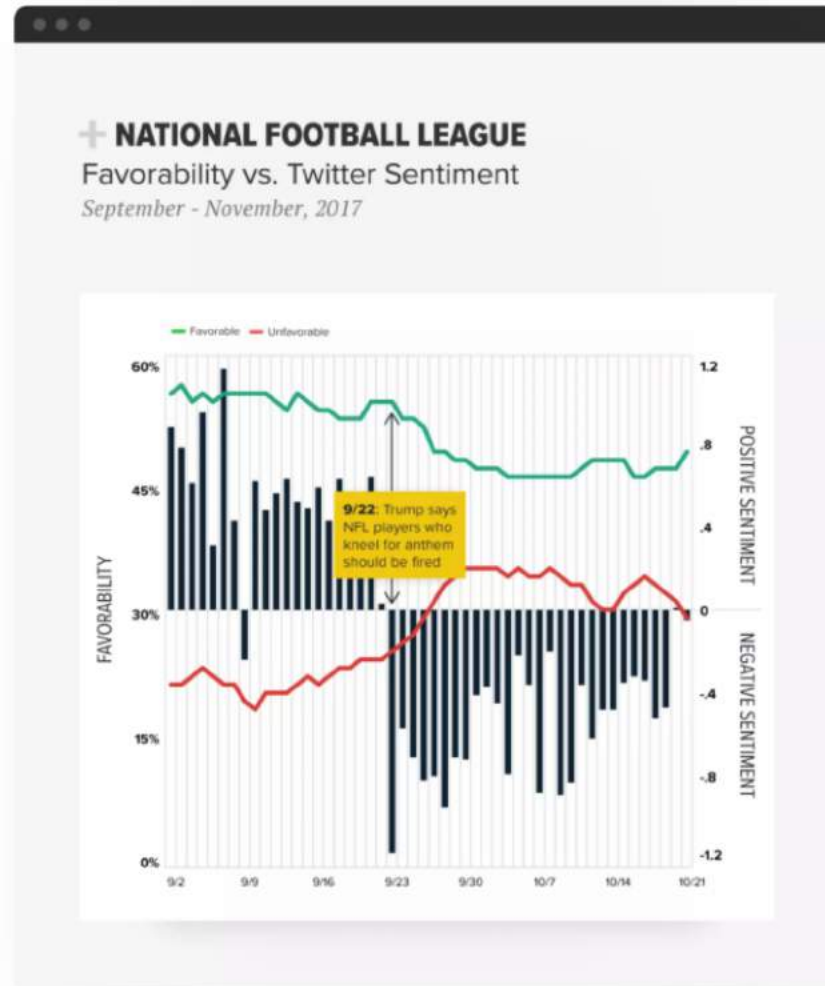


The rankings were determined using surveys conducted online among a national sample of adults. Between 2,500 and 50,000 adults rated each of the companies from January through March 2018. The maximum margin of error for a given brand is plus or minus 2%.

The 5 standout food and beverage brands among young adults

These are the brands that have the greatest differential in net favorability when comparing 18-29 year-olds to all adults.





A 360-degree view of your brand, in one screen. Every day.



WHAT CONSUMERS *think*

Collecting over 3 million market research interviews



WHAT CONSUMERS *say*

Evaluating over 100 million social media posts



WHAT CONSUMERS *see*

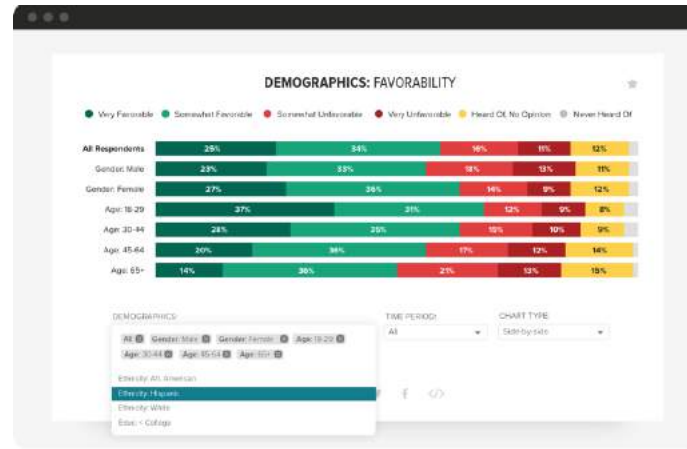
Analyzing over 85,000 news media outlets

Brand Intelligence



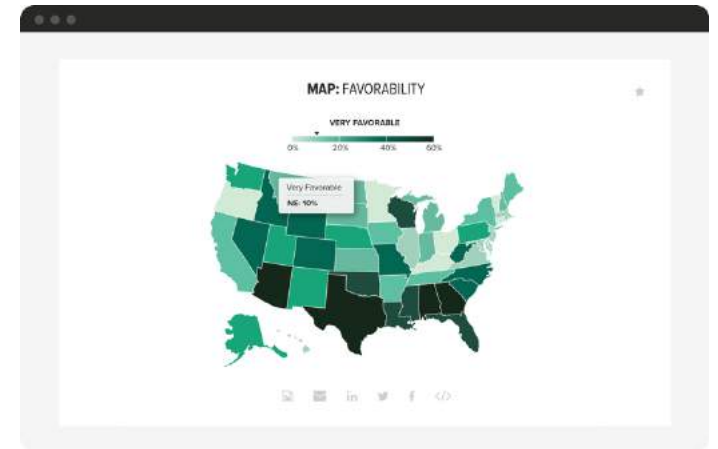
BENCHMARK BRAND PERFORMANCE

Compare your brand's performance with competitors across survey, economic, social media, and news media metrics.



IDENTIFY DEMOGRAPHIC TARGETS

Through 60,000 consumer interviews per brand, identify key targets across 35 demographic variables, including gender, age, and ethnicity.



EVALUATE GEOGRAPHIC TRENDS

With data tracked down to the ZIP code, understand how your brand performs state by state and DMA by DMA.

[REQUEST A DEMO HERE](#)

Use Cases



DAILY MONITORING

Track brand perception in real-time with the Brand Intelligence dashboard in your inbox



STRATEGIC PLANNING

Identify demographic targets and geographic trends to customize communication & marketing campaigns



CRISIS RESPONSE

Evaluate the magnitude of a crisis and track the effectiveness of your response

“ This kind of real-time brand tracking has become a necessity.

- WIRED

Contact



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VISIT: www.intel.morningconsult.com

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