SOCIAL MEDIA LISTENING

EMERGING TRENDS

Social Insights & Consumer Research

Manning Gottlieb | OMD

Contents

01
Methodology

Social Listening to identify 2018 food trends

Analysis of **social data**, **search data** and **consumer interviews** to uncover drivers of conversations and the communities they engage with.

From the stage 1 categories, we analysed the emerging topics for micro-moments and trends to identify:

* The audiences who discuss our topics

* Core features of the conversation

* Pain and passion points

* Influencers within these trends

We reviewed the conversations from last year across the super topics to identify **where**, **who** and **what** is being talked about. The **interactions**, **motivations** and **origins** of the **food conversations** as set in the proposal.

We built a **trend model** and conversational profile of what the topics are like, based on sub-topic movement, types of conversations and followed accounts.

To further explore the topics we interrogated **Google Search** data through tools such as Google Trends and Answer the Public alongside social listening to view **long-term trajectory** of top 5 trends within the categories and to better understand areas of interest and **gaps** within the topics.

Key stats

14

Online sources

13.5m

Online/ Social mentions

46

Topics

21

Interviews

recipe #recipe
#food eat edible
#nutrition food
eating nutrition
cooking foodie

Original key words used to identify topics of conversation

02
Topic Landscape

Topic Overview – Stage 1 findings

46 food trends identified in stage 1, sorted by size showing trajectory across 2018. Where trends are seasonal direction may not indicate overall decline.

	Trend	Value		Trend	Value		Trend	Value		Trend	Value
↓	Vegan	**3m**	↑	Dairy Free	**218.3k**	↑	Climate	**100k**	↓	Trans Fat	**35.7k**
=	Foodie OR #foodporn	**2.5m**	=	Palm Oil	**209k**	=	Meat Free	**83.4k**	=	Food Labels	**32.8k**
=	Sugar	**1.2m**	=	Diet for Disease	**206.6k**	↑	Seasonal	**82.7k**	=	Mindful Eating	**32.6k**
↑	Food Bank	**767k**	↑	Single Use Plastic	**197.8k**	↑	Identity	**76k**	=	Health Benefits	**27.6k**
=	Fitness OR exercise	**621.8k**	=	Sustainability	**191.4k**	↑	Paleo	**75k**	↑	GMO/ Lab Grown	**21.4k**
=	Obesity	**590.8k**	=	Organic	**184.4k**	↓	Convenience	**74.5k**	↓	Raw Food	**20.4k**
↓	Environment	**450.5k**	↑	Keto	**178k**	↓	Meat/ Dairy Farming	**71.2k**	↑	Fermented Food	**18.6k**
↑	Plant Based	**408.1k**	↓	Specific Foods*	**148.6k**	↓	Super Food	**63.8k**	↑	Flexitarian	**14.1k**
↓	Eating Disorder	**300.6k**	↑	Local	**138k**	↑	Gut Health/ Digestion	**61.7k**	=	Food Function	**6.9k**
=	Gluten Free	**272k**	↓	Seitan/ Tofu	**134.7k**	↑	Allergy/ Intolerance	**60.7k**	=	Water Usage	**4.8k**
↑	Food Waste	**259k**	↓	Consumption (eg effects)	**114.6k**	↓	Food Education	**59.9k**	=	Flavour Profiles	**2.3k**
↑	Fast Food	**224.9k**	↓	Lifestyle/ Ethics	**111.2k**						

Volume change across 2018 is represented through the icons.
Icons indicate directional trend across the year and therefore may indicate seasonal fluctuation, e.g. higher volume of 'vegan' conversation during 'Veganuary' v December
*This includes jackfruit OR #jackfruit OR Chayote OR #chayote OR matcha OR #matcha OR "maca" OR #maca OR elderberries OR aquafaba OR #aquafaba
Social mentions tracked through Talkwalker.

Super categories identified *(workshop outputs)*

Following a working session the FSA & Manning Gottlieb categorised the 46 trends into 4 super-categories to provide focus and direction for stage 2.

Meat reduction **3.8m**	**Health** **4.4m**	**Food system** **1.2m**	**Sustainability** **1.6m**

Meat reduction
Vegan
Flexitarian
Plant based
Seitan / tofu
Meat free
Lifestyle / ethics

3.8m

Own health
Health benefits
Fermented foods
Gut health
Diet for disease
Super food
Mindful eating
Flavour profiles
KETO
Raw foods
Food function
Paleo
Specific foods
Identity
Fitness / exercise

1.5m

Issues with food system
Food labels
Food education
Meat / dairy farming
GMO / lab grown
Fast food
Convenience

484k

Food bank

767k

Sustainability
Environment
Water usage
Climate
Local
Organic
Seasonal
Sustainability
Food waste
Single use plastic
Consumption

1.6m

Negative own health
Obesity
Sugar
Gut health / digestion

2.1m

Eating disorder

300.6k

Allergies
Gluten free
Allergy / intolerance
Dairy free
Food function

522k

Landscape

Food banks

Fast food

Food system 1.2m ⚑⚑⚑

Convenience

Food labels

GMO / lab grown

Flexitarian

Meat free

Food education

Meat / Dairy farming

Health benefits

Fitness / exercise

Flavour profiles

Identity

KETO

Fermented foods

Specific foods

Paleo

Superfood

Meat reducing

Tofu

Food function

Health 4.4m ⚑⚑

Diet for disease

Mindful eating

3.8m ⚑⚑⚑

Foodie 2.5m

Gut health

Eating disorder

Sugar

Ethics

Plant based

Obesity

Gluten Free

Vegan

Trans Fat

Dairy free

Allergy/Intolerance

Food waste

Climate

Water usage

Sustainability

Consumption

Sustainability 1.6m ⚑⚑

Seasonal

Local

Single use plastic

Environment

Organic

The landscape highlights the complexities and composition of 'health' showing many 'important topics', whilst meat reduction is mostly driven by 'vegan' conversation and sustainability highlights a balance of a range of equal important matters. In contrast to the Food System with a disparate group of topics, dominated by fast food and food banks.

03
Super-categories

Health

Across the top themes within Health, we can see a balance between positive change (positive health, fitness and exercise), negative effects (eating disorders, negative health), and topics that sit in the middle ground where actions are taken to boost positive health (diet, allergens, intolerances). The following sub topics were identified

Own Health	Fitness & Exercise	Dietary	Allergens & Intolerances	Negative Health	Eating Disorders
Healthy Lifestyle	Clean Eating	Allergen Free	Gluten Free	Obesity	Weight Loss
Disease	Low carb	Clean Eating	Wheat Free	Weight Loss	Nutrition
Wellness	Healthy Lifestyle	Plant Based	Dairy/Lactose Free	Nutrition	Energy
Nutrition	Nutrition	Low carb	Specific Foods	Processed Foods	Mental Health
Energy	Training	Fitness & Exercise	Symptoms	Education	Symptoms
Education	Energy	Weight Loss	Risks	Disease	Risks
Body & Brain	Mental Health	Disease		Children	Treatment
Sleep		Environment		Government	
Mental Health		Nutrition			
Children		Training			
		Vegan			
		Organic			
		Vegetarian			

Health

4.4m mentions in 2018

The top five topics within the health category are:

- Sugar (1.2m)

- Fitness & Exercise (618.7k)

- Obesity (555.1k)

- Diet for Disease (187.3k)

- Keto (178k)

1.9m of the same topics in 2017 – likely differences are due to different core topics of health conversation in 2017

Health topics with the highest volume saw a relatively steady level of conversation through the year. Topics that saw a decline through the year include *raw food, super foods, specific foods* **identified as 'on trend' and** *eating disorders*

Legend (top to bottom):
- **Specific Foods**
- **Keto**
- **Diet for disease**
- Dairy free
- Gluten free
- **Eating disorders**
- **Obesity**
- **Fitness / Exercise**
- **Sugar**
- *
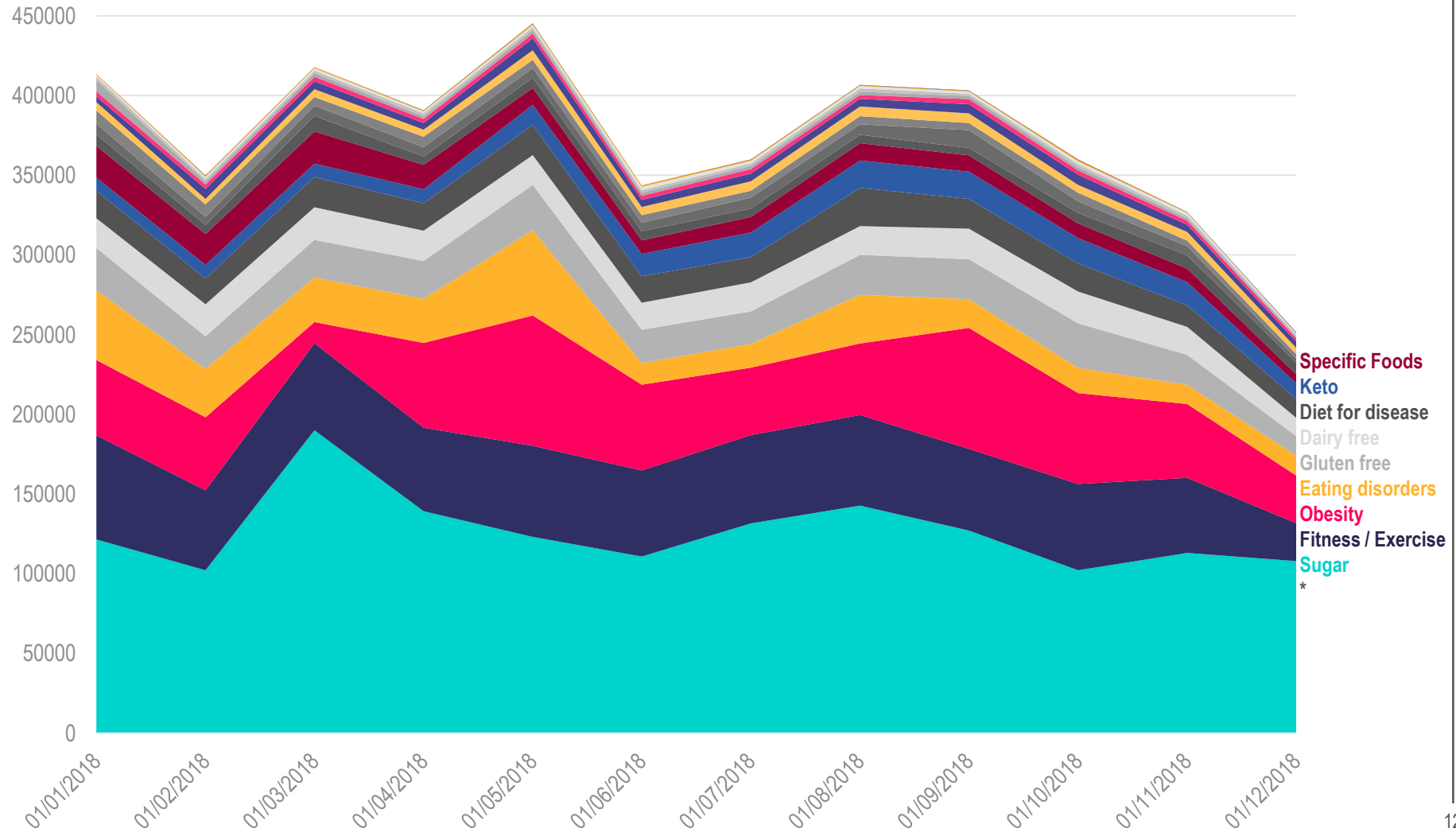
* Topics with less that 100k mentions in 2018 (bottom > top)- Identity, Paleo, Super Foods, Gut Health, Allergy/Intolerance, Mindful eating, Health benefits, Raw foods, Fermented foods, Food function, Flavour profiles

Health conversations are intertwined with own health with improving or maintaining this being a core focus

Allergens

Rise of allergen conversations over 2018 especially across Dairy. Common conversations include alternative availability (across dairy, coeliac), and corporate responsibility to mislabelling

Negative health

Conversations around perceived and proven negative effects of food on people's health. The largest topics here include sugar and obesity

Health

This is largely driven by conversations around one's own health which aligns with four main subtopics – allergens, dietary, negative health and eating disorders; some of which feed into each other, other super topics (meat reduction) and smaller topics – like fitness & exercise

Across the sub topics within health there were over 2.8m mentions where diet was a feature including diet for disease, Keto, Paleo, gut health/digestion, and topics that span across other sub topics including obesity, fitness training and allergies

Without looking at specific eating disorders, this topic is discussed in a wellbeing, treatment and support context with 66% of the mentions coming from women

Dietary

Eating disorders

Fitness & Exercise

Health conversation overview

Health conversations are largely driven by a personal and societal shift to food and disease education. Top topics include alternative diets, negative impacts on health from poor diets, and destigmatising diseases or dietary requirements. Fitness, exercise and mental health are topics that appear across the sub topics highlighting the physical and mental effects of food.

Conversations are fairly constant throughout the year for the majority of the sub topics in health, with peaks driven by societal news (sugar tax). Conversations were higher in the first half of the year due to a viral sugar tweet and this viral tweet* on men.

This audience:

- Highlight the negative effects of bad health as a way of informing and encouraging better habits and changes

- Inclusivity is more mainstream and directed towards – across dietary choices, understanding allergies and intolerances better

- Influencers across fitness, health, cookery are highly engaged with showing a highly active audience

- Positive change is the goal

Twitter	Instagram	Blogs & Forums	Newspapers online	Other (inc Facebook)
72%	12%	7%	4%	5%

*tweet son Eating Disorder topic themes slide

Mention source breakdown

Location breakdown

Palesnaps @sadtendencies tweeted
*Boys get depressed *Boys get eating disorders *Boys commit suicide *Boys get called fat *Boys get called ugly *Boys get hit/abused by girls *Boys get suicidal *Boys feel pain It's NOT just girls that go through a hard time, it's boys too. People need to start realising this.
published on 19/05/18 at 09:41 | Twitter | United Kingdom | twitter.com

Monaé @meeranonae Follow
I'm getting old because I don't think I could tolerate all this sugar
z @oc13c
I will find you, and I will marry you.
Show this thread
3:31 AM - 14 Mar 2018
88,199 Retweets 237,235 Likes

Age breakdown

13-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+

53% women | **47% men**
Gender breakdown

13-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+

Out of the top health topics, interest in *sugar* and *gluten free* has grown gradually over the last decade, whilst searches including *fitness* and *obesity* are steady long-term. *KETO*, however, has seen a huge growth over the last couple of years.

Google Trends

Interest over time (?)

Past 15 years

Past 5 years

● sugar
Search term

● fitness
Search term

● obesity
Search term

● gluten free
Search term

● KETO
Search term
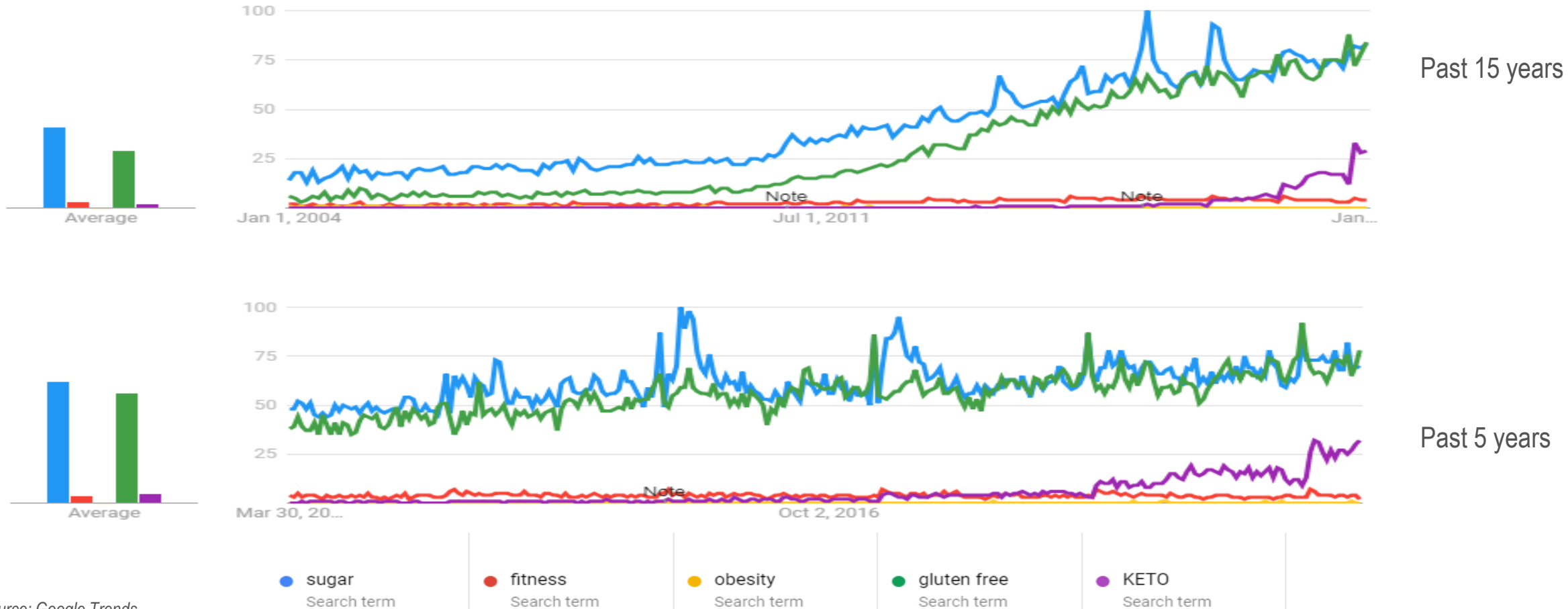
Source: Google Trends

Qual insights

Healthy eaters vary in their diet, but are all driven by a desire to improve personal health outcomes and seek, share and crave information and inspiration across a range of channels

Capability
- Acquired knowledge about healthy eating, food potencies and contaminants from news, health professionals and specialist retailers
- Change of health circumstance and discovery of new foods can be challenging
- Cooking skills enable, slow adoption by restaurants and retailers prevent adoption

Opportunity
- Dependent on availability of options and meal planning and preparation abilities
- Social occasions / work catering can be challenging and require further planning
- Drinking alcohol as well as choosing between 'taste' and 'health' can disrupt

Motivation
- Driven by personal goals of intervention or prevention for health and fitness.
- Parents motivated by staying healthy for their children and raising them healthily
- Finding reassurance by others or a framework to follow reinforce healthy eating
- Tangible positive results – weight loss, better mental health – further motivate

Behaviour
- Healthy eating approaches vary greatly and are influenced by food trends (e.g. KETO, paleo, vegan, super foods)
- Some use the traffic light system to guide their choices
- All avoid/limit processed meats/foods and most reduce meat intake

Gaps
- Independent healthiness reviews (e.g. BMI v muscle)
- Gov intervention in Facebook food 'facts'
- Schools & parents should educate future generations
- More info on 'super foods' in retailers and schools

Recipes – nutrition – inspiration – share

'Even though you hear all these things […] you keep thinking 'wont' happen to me' .
We've had cancer touch our family twice now and a few heart issues […], as you get older you start reassessing how invincible you are […] we watched those [documentaries] and went plant-based overnight'
Fran, 50, Midlands

Source: Bespoke qualitative interviews

Summary

- Main themes are Sugar, current and specific / super foods (though latter on decline in social, still relevant in mainstream behaviours) and avoiding processed foods

- Driven by desire to improve health outcomes for self and generations to come

- Fuelled by curiosity and discovery of new foods – foods are interchangeable, similar to Fashion

- Strongly influenced by social media and own food/health research

- Education is a core factor in comms – consumers expect to be educated and educate others online on nutrition and dietary requirements

- Healthy eating highlighted in an improvement function – to prevent/tackle negative health issues, often alongside fitness

Dietary choices will continue to evolve, with the introduction of micro diets that feed into larger food consumption choices.

Meat Reduction

Across the top themes within this topic, we can see that there are personal and cultural considerations to eating less meat or cutting animal products out completely. Internal reasons can depend on values or biological requirements (dairy free, gluten free) and external reasons link into values for the planet (water usage, environment) or for animal cruelty reasons (organic, animal welfare). The motivations are not limited to any one reason and often overlap through multiple themes. The following sub topics were identified

Dietary	Ethics	Lifestyle	Health
Allergies	#foodporn	Fitness	Dairy Free
Protein	Fitness	Healthy	Organic
Vegan	Healthy	Travel	Homemade
Dairy Free	Animal Welfare	Fashion	Fitness
Organic	Diet	Vegan	Lifestyle
Homemade	Water Usage	Lifestyle	Animal Welfare
Fitness	Global Environment	Vegetarian	Vegan
Lifestyle		Environmental	Vegetarian
Gluten Free		Protein	Nutrition
Animal Welfare		Plant Power	
Plant Power			

Meat Reduction

3.8m mentions in 2018

The top five topics within the meat reduction category are:

- Vegan (2.2m)

- Plant Based (400.3k)

- Lifestyle/ Ethics (119.6k)

- Seitan/ Tofu (83.6k)

- Flexitarian (11.6k)

1.1m of the same topics in 2017 – likely differences are due to different core topics of meat reduction conversation in 2017

Plant Based and Flexitarian topics grew through 2018 with *vegan* decreasing slowly through most of 2018 (peaking due to Veganuary)

Legend:
- Flexitarian
- Meat Free
- Lifestyle / Ethics
- Seitan / Tofu
- Plant Based
- Vegan
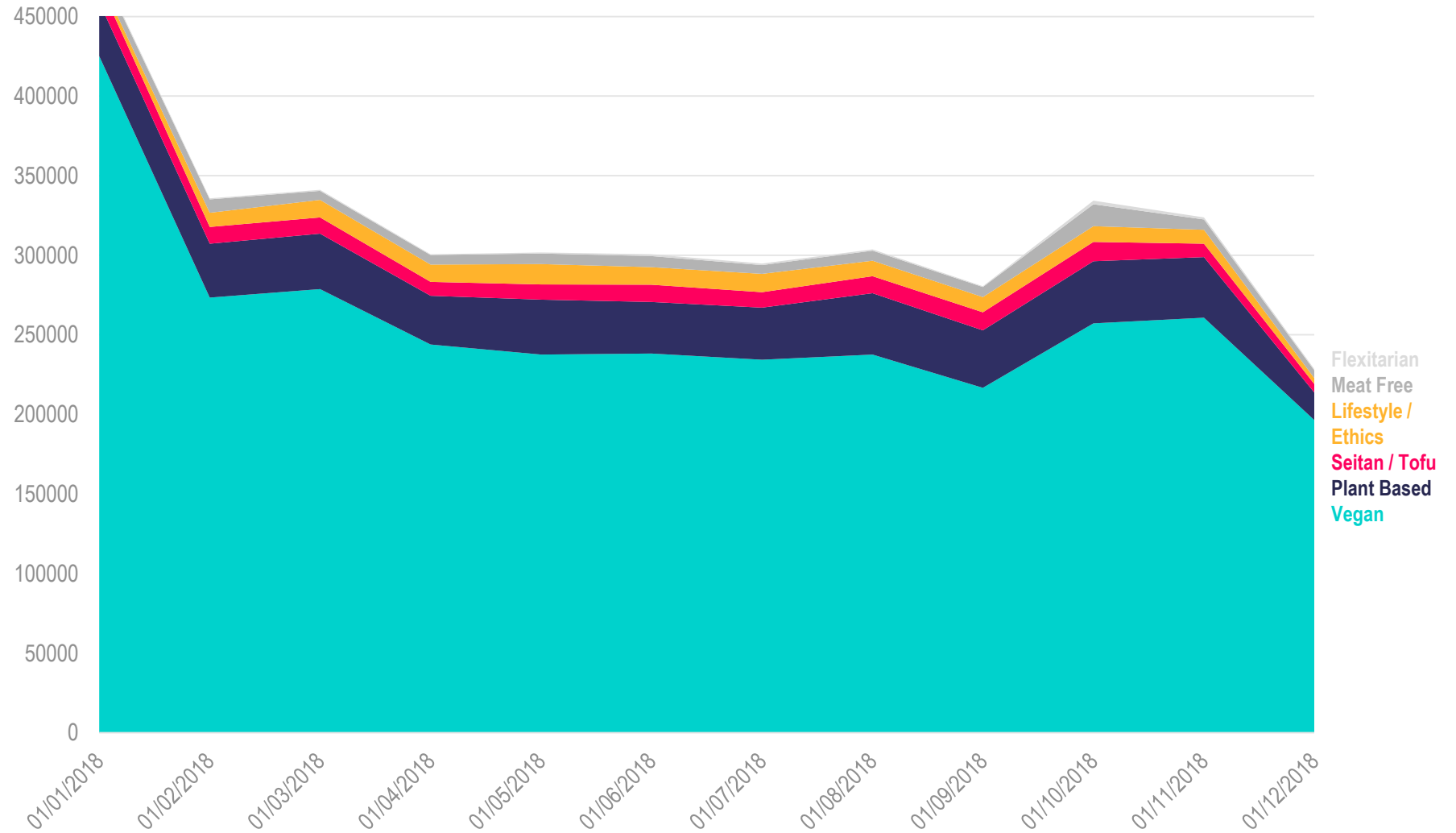
Meat reduction conversations are outcome focused either internally for an individual or as a carbon footprint example

Dietary

The different requirements and motivations for people to either reduce or sustain their meat intake are discussed with the largest topic being vegan and diet

Health

Conversations around the perceived and proven negative effects from eating meat (pollution) and positive effects from reducing meat intake (environmental and on health). The largest topics here include free from and plant based

Meat Reduction

The impact on the environment and overall health and wellbeing (physically and value based) are notable and a key topic throughout 2018

Ethics

This topic is holistic and talks about the impacts and consequences of a diet or way of life. These could be physical improvements on health or the environmental impact consumers have

Lifestyle
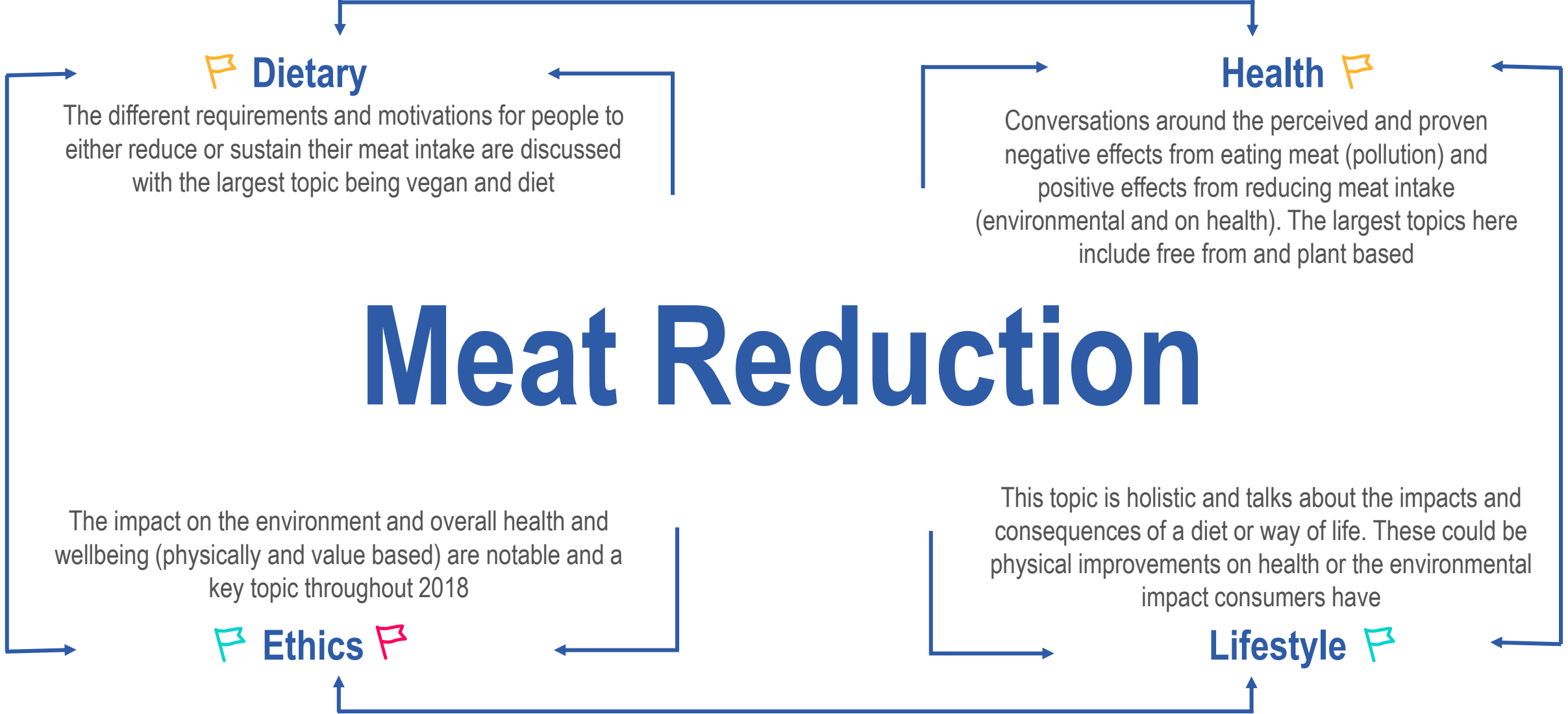
Meat Reduction conversation overview

Top themes within the meat reduction conversation are the environmental impact that farming and consuming meat has on the world with specific diets or ways of life that have been introduced to combat this. The consumer effects of these specific diets are mainly discussed in 'health' and 'lifestyle' as conversation steers away from specifically vegan to more balanced consumption of food groups.

Conversations are larger in January and toward the end of the year with two large peaks in October and November due to articles on the applied obligation from consumers to reduce their intake of meat to help climate change (Oct) and in November news of retailers/restaurants and industries making changes to their offering to provide for people seeking meat reduction.

This audience:

- Engage highly with news sources which encourage the adoption of the conversation

- Have a strong affinity with proclaiming their vegan status in bios and talking about vegan options

- The influential audience are more authoritative and open conversations about the (problems) negative impacts on the world rather than the solutions

- They are inquisitive and want to help others find easier ways to make vegan more accessible which is appears more solution focused. They don't often express their reasons for being vegan but provide options for choosing a more thoughtful lifestyle

Twitter	Instagram	Blogs & Forums	Newspapers online	Other
79%	17%	1.4%	1%	1.6%

Mention source breakdown

*tweet son Eating Disorder topic themes slide

| 13-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |

21
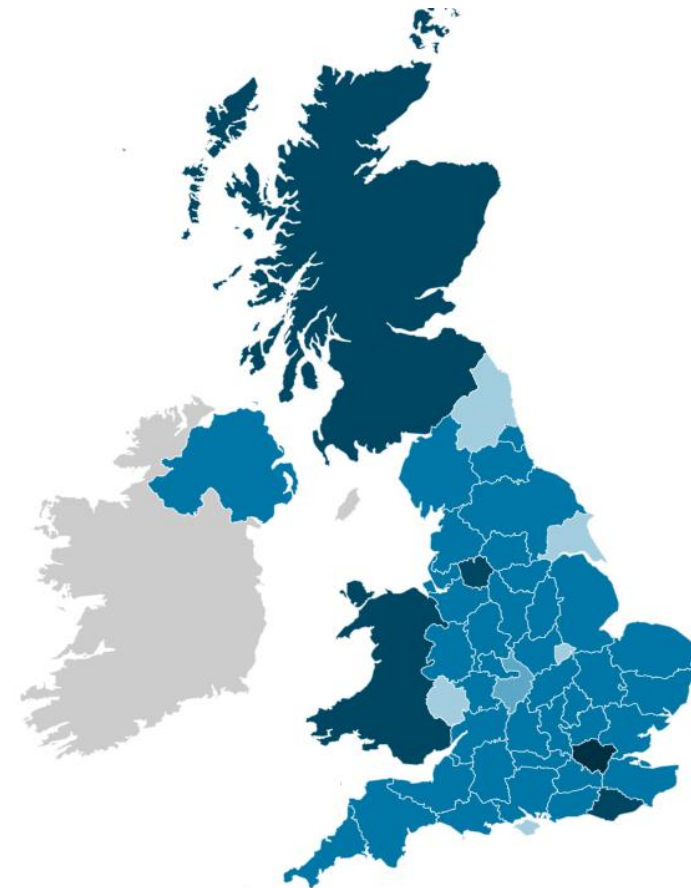
Location breakdown
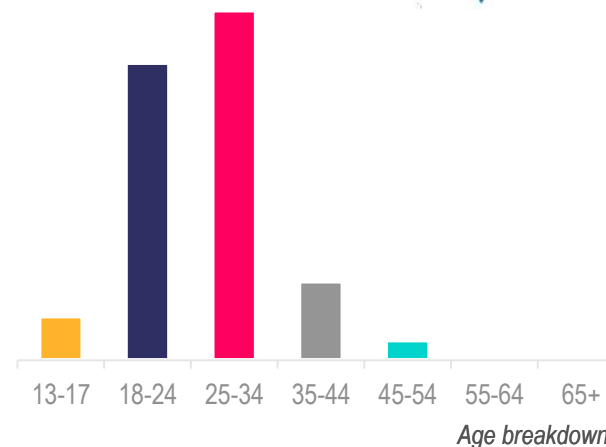
Age breakdown

57.5% women   **42.5% men**

Gender breakdown

Searches for *vegan* are clearly dominating the meat free conversations and have increased greatly year-on-year for the past 4 years. Whilst there has been some curiosity in *seitan* over the last couple of years, other meat reducing search terms are anecdotal.

Google Trends

Interest over time ⑦

100

75

50

25

Average   Jan 1, 2004   Note   Jul 1, 2011   Note   Jan...

Past 15 years

Interest over time ⑦   ⬇   < >   ⤬

100

75

50

25

Average   Mar 30, 20...   Note   Oct 2, 2016
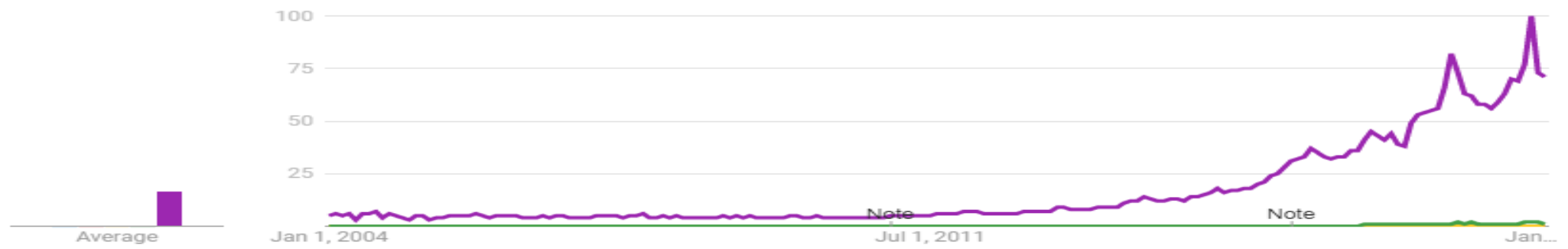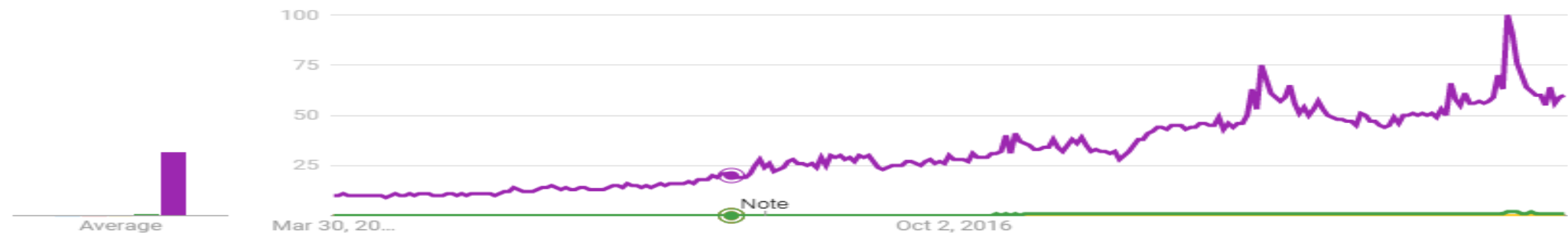
Past 5 years

● plant-based   ● Meat-free   ● flexitarian   ● seitan   ● vegan
Search term   Search term   Search term   Search term   Search term

Source: Google Trends

Qual insights

Veganism becoming mainstream enables more consumers to make permanent or temporary meatless choices. Information is accessible and found across all channels and easily shared. There is a clear divide between those 'campaigning' for veganism with provocative and distressing content and those preferring to inspire through 'good example' or keeping to themselves to avoid confrontation. All crave more information and labelling of foods to help support their lifestyle.

Capability
- Increased awareness and understanding of agriculture, ethical concerns and health effects of animal product consumption
- Learning about vegan nutrition and sources of protein
- Reinforced by belief humans were not designed to digest dairy

Opportunity
- Increased availability of vegan choices in retailers/restaurants and better labelling
- Some schools don't accommodate vegans and convenience choices are limited
- Social circles are highly influential in enabling or complicating meat reducers intentions

Motivation
- Three types of vegans/vegetarians known: ethical, dietary and environmental. Respondents mainly driven my ethical (animal cruelty) or health reasons.
- Regardless of main driver, all report positive physical and mental health outcomes as a result of their diet, which further encourages behaviour

Behaviour
- Ranging from consciously reducing the amount of meat and opting for more sustainable sources to vegetarians and strict vegans
- Vegan/vegetarian parents we interviewed still feed animal products to their children

Gaps
- Accessible public guidelines (similar to 5-a-day)
- Simple messaging on positive effects of meat reducing
- V labelling on supplements
- Health warnings on processed meat
- Vegan nutrition education

Inspiration v confrontation   information
recipes   share   events   documentaries
fundraising

'You tend to get a lot more vitamins and minerals [on a vegan diet] because you're conscious of the fact that you're taking things out of your diet you're make a concerted effort to make sure you get he vitamins you need '

Ria, 34, London

Summary

- *Vegan* is the biggest term on the web and cutting down on meat consumption is becoming increasingly relevant for a number of people.

- Motivations for reducing / cutting out meat are diverse and span across three main areas 1) animal welfare 2) sustainability and 3) health. Increase in conversations is largely driven by 'health' and elements of sustainability, with animal welfare featuring in discussions as the 'default' association, but not being the primary driver of the trend.

- Similarly, consumers increasingly block out graphic content from their feeds and those who share pro-vegan content aim for 'positivity' over 'shock material'.

- And as meat reduction is becoming more mainstream, language is adapting to reflect the widening range of motivating drivers of the behaviour. Where health motivated vegans refer to *plant-based diets*, whilst 'fundamental' vegans adopt a full vegan life. These groups, however, don't act in silos. The 'holistic' vegans influence and provide even the healthy plant-based eaters with information and ammunition.

- Strongly influenced by social media, TV (documentaries) and wider cultural trends.

Plant-based diets are likely to grow further subject to public health advice, i.e. may only be put to stop by evidence of harm through plant-based diets or significant benefits of animal product consumption.

Sustainability

Across the top themes within Sustainability, we can see that motivations within these conversations are heavily effects-based with outcomes being the most discussed. These can be at varying levels of control for individuals including top level (government, best before dates, businesses) or consumer level (grow your own, British, Veganism). The following sub topics were identified:

Sourcing

Local / Community
Seasonal
Businesses
British
Grow your own
Organic
Sustainable Lifestyles
Meat and Dairy
Single-Use Plastic
Best Before Dates
Emissions
Quality Animal Farming

Environmental

Emissions / Pollution
Business vs People changes
Quality
Animal Farming
Energy Expenditure
Effects on Nature
Climate Change
Waste/Landfill
Single Use Plastic
Country Footprint
Crop Water Use
Global Effect

Consumption

Meat and Dairy
Effects on Nature
Health Effects
Veganism
Energy Expenditure
Farmers
Businesses
Sustainable Lifestyles
Plant Based Diet
Single Use Plastic
Best Before Dates
Food Waste

Sustainability

1.4m mentions in 2018

The top five topics within the sustainability category are:

- Environment (295.7k)

- Food Waste (206.9k)

- Organic (168.3k)

- Sustainability (168.4k)

- Single Use Plastic (158.3k)

2.2m of the same topics in 2017

Ethical topics including *food waste*, *local*, *seasonal* and *climate* all saw gradual increases in volume through 2018. *Single use plastics* saw a huge increase due to schemes to promote reusable cups.

Legend:
- **Water Usage**
- **Seasonal**
- **Climate**
- **Consumption**
- Local
- Sustainability
- **Organic**
- **Single Use plastic**
- **Food waste**
- **Environment**
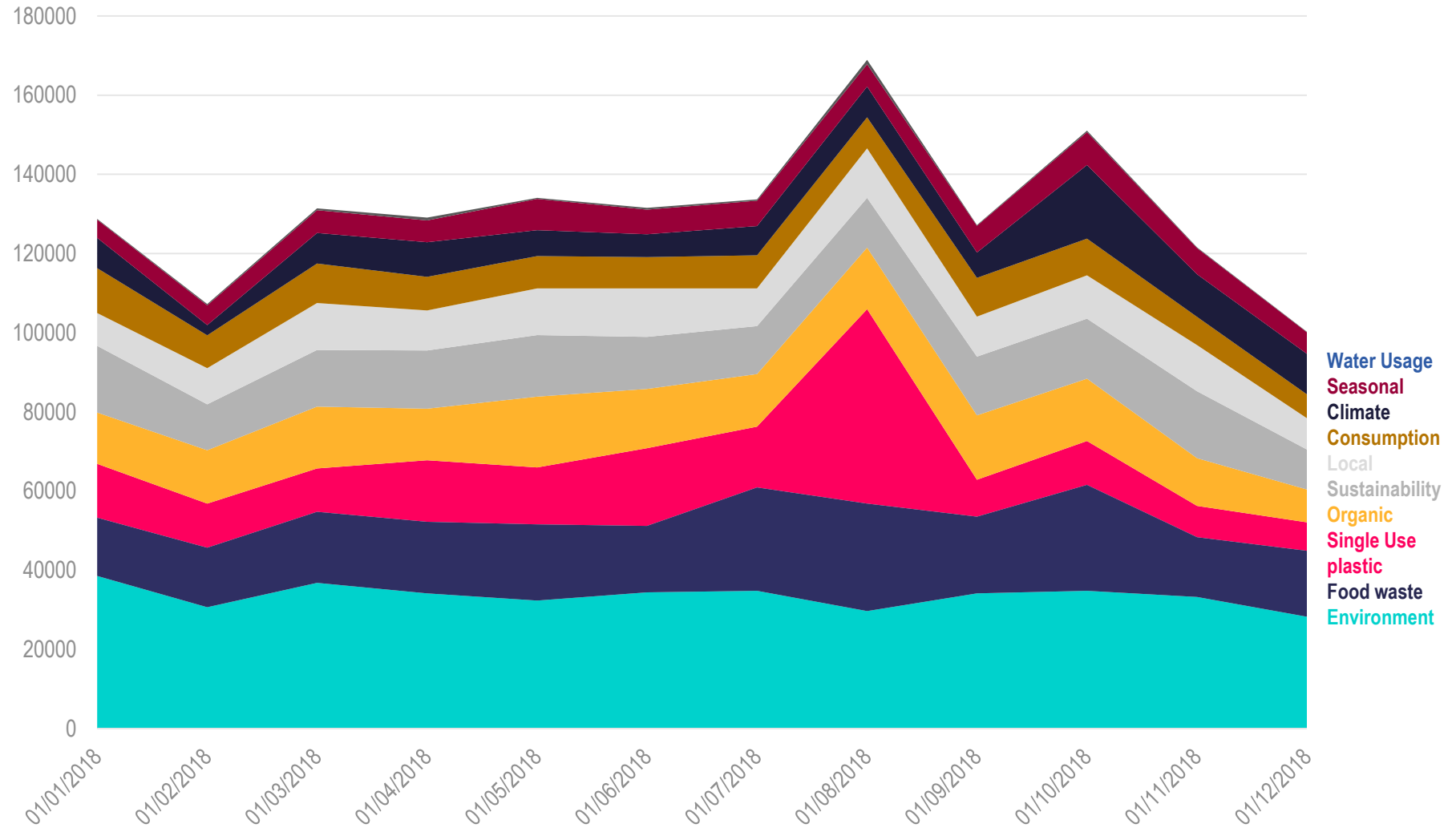
Sustainable conversations highlight the cultural shift to this becoming an issue affecting everyone and not just businesses

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Sustainability

This topic is built on sustainable choices and effects of consumer, business, manufacturer habits and processes.

⚑ **Sourcing**

As consumers look to become more supportive of locality and becoming more eco-conscious, conversations around organic, seasonal and British remain a core focus for them

⚑ **Environmental**

Made mainstream by Blue Planet and Sir David Attenborough, the effects of our consumption and use of materials has been a huge talking point in the last year with this affecting both the consumer and business operations

⚑ **Consumption** ⚑

Consumption conversations are highly linked to environmental affects of farming and food wastage. This is discussed on a corporate, national and personal level

Sustainability conversation overview

Sustainability conversations are focused on highlighting the effects of living a more ethical life for personal and global reason, and also combatting food poverty in the UK. Top topics include dietary changes including sustainable meats and fish, shopping locally and seasonally, food poverty across the UK; often spoken about in regards to children, food banks (often in response to politicians) and environmental effects of farming and our consumption. A lot of these conversations intertwine across the sub topics identified.

Sustainability as a super topic grew gradually in 2018, with this being boosted by the effects of plastics on the environment. Five of the trends identified within this topic grew over 2018, with Single Use Plastics being one of the most prevalent.

This audience:

- Share and educate others (and themselves at the same time) on the effects of our consumption and better ways to be sustainable

- Consider small but effective changes to the way they eat, and the products they use to slow down the environmental effects of previous norms

- Are likely that they expand their sustainable actions to other areas of their life

- Heavily engaging with newspapers which highlight climate and environmental news with shares of this across Twitter and Facebook – highlighting a strong affinity to the subject
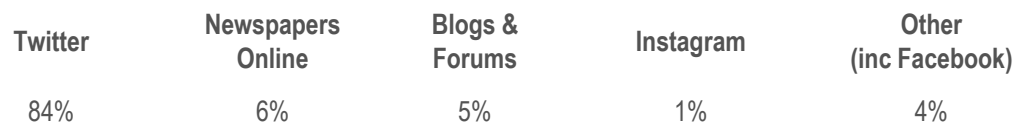
Twitter	Newspapers Online	Blogs & Forums	Instagram	Other (inc Facebook)
84%	6%	5%	1%	4%

Mention source breakdown

*tweet son Eating Disorder topic themes slide

| 13-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |

Location breakdown
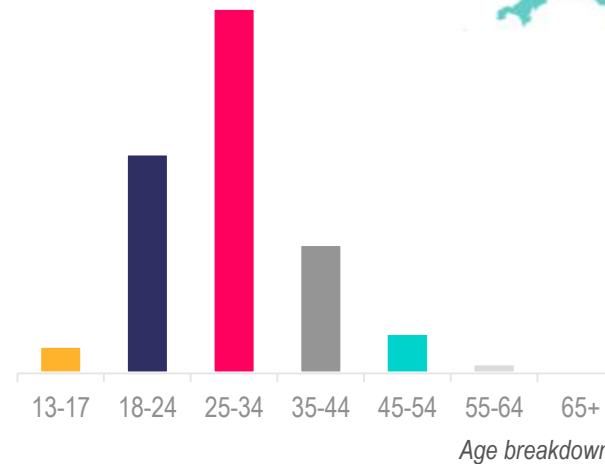
Age breakdown

47% women   **53% men**

Gender breakdown

All main concepts of sustainability have been consistently searched for over the last 10 years, with a constant, slight increase year-on-year. *Organic*, however, has had even greater interest 15 years ago followed by a decline until 5 years ago.

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Google Trends

Interest over time ⑦
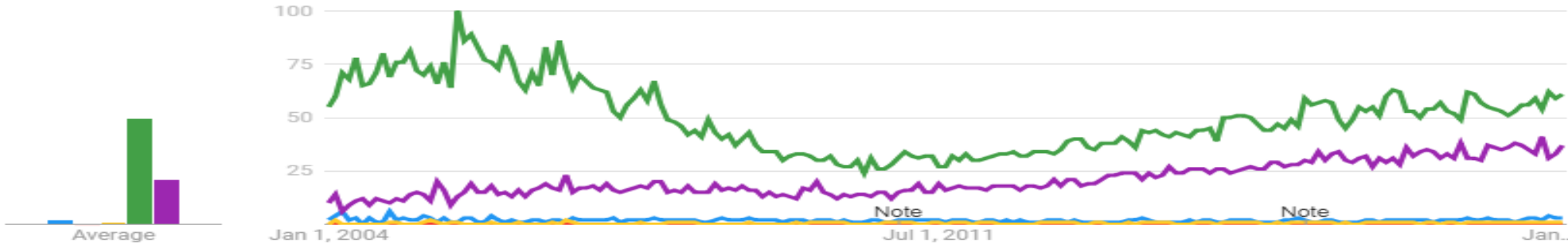
Past 15 years

Interest over time ⑦
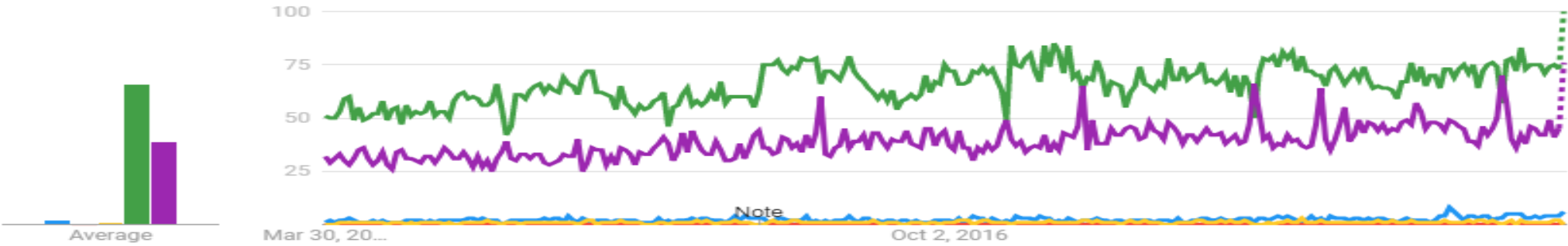
Past 5 years

- environment — Search term
- single-use ... — Search term
- sustainabil... — Search term
- organic — Search term
- local — Search term

Source: Google Trends

Qual insights

Sustainable consumers are curious and conscientious about the impact of food on the environment and humanity and actively seek information on further improving. They like to raise awareness on issues, educate their children and wish for wider adaptation of sustainable eating / living. The biggest barriers for them are high cost and social eating / influence, often from older generations.

Capability
- Increased awareness and understanding of sustainability issues equipped consumers with knowledge to need to make adjustments to their lifestyles
- On a societal level Brexit has raised awareness of supply chains and food origins, whilst others have learned about sustainability from other country's philosophies

Opportunity
- Retail availability, visibility through labelling and awareness of local/farm shops
- Travelling and learning from farmers / fishermen about sustainable options
- Cost is a barrier as well as persuasions within larger households, where parents positively influence children, grandparents can be more sceptical or critical

Motivation
- Saving the planet and responsibility to their children / future generations
- Reinforced by feeling well as a result – both mentally and physically, with one respondent saying she feels less angry and bloated since reducing meat
- Another respondents admits the struggles of breaking lifetime routines

Behaviour
- Eating seasonal fruit and veg, shopping locally and straight from the farm or at least free range and choosing sustainable fish
- Reduced meat and/or dairy intake for sustainability reason, partially driven by the higher price point of sustainable meat/fish options

Gaps
- Accessible carbon footprint info / labelling
- Information on issues on supply chain, provenance, seasonality for wider audience available at POS

Learning – inspiration – sharing - education

'I'm always trying to look for sustainable fish where I can. I will always look for Pollock or Basa that are not overfished […] so I'm trying to avoid Cod or Haddock if I can, because I think […] we're overfishing these type of fish and if we continue to buy them they'll go extinct'

Kris, 29, Scotland

30

Summary

- Local and organic are constant behavioural pillars of sustainable consumption.

- Consumers discuss sustainable farming and product choices including avoiding meat and animal products versus single source (farm to plate) produce. Choosing sustainable fish and reducing single-use plastic are becoming more prominent with broad media news coverage of ocean pollution.

- Better futures for generations to come, preserving the planet as well as health benefits of natural, single-source foods are main drivers.

- Convenience and cost pose significant barriers to mass adaptation of behaviours and trends are likely to grow incrementally as industries adapt and consumers continue with 'baby steps' to sustainable living.

- Introduction of consistent sustainability signage / system similar to nutritional traffic light system would accelerate behaviours.

Whilst awareness of sustainability is growing, adaptation of choosing sustainable produce and products remains a privilege. Opportunities for wider behavioural change lie in supporting consumers to reduce food waste and encouraging industries to reduce over production/straight to landfill.

Food System

Across the top themes within Food Systems, we can see that there are different industries (government, farming, restaurants) and initiatives (Children's meals, community, school meals) within the topic. This topic is quite broad and covers:

Food Banks	New Tech	Fast Food	Education	Farming
Brexit	GMO/Lab Grown	Government	Food Labels	Meat/Dairy farming
Homeless	'Fake' meat	Family	Sugar	Animal Welfare
Community	Slaughter Free	Health	Allergies	British
Families	Ethical	Quick Meals	Nutritional Education	Local
Children's Meals	Health Benefits	Price	Health	Brexit
Poverty		Convenience	Climate Effects	Climate Breakdown
Government			Meat Farming	Innovation
			Poverty	Slaughter Free
			School Meals	Ethical
			Food Industries	Free Range
			Government	
			Quality	

Food System

1.4m mentions in 2018

The top five topics within the food system category are:

- Food Banks (795.9k)

- Fast Food (223.8k)

- Meat/Dairy Farming (71.2k)

- Food Education (57.7k)

- GMO / Lab Grown (21.2k)

1m of the same topics in 2017

Food System conversations, outside of *food banks* and *fast food*, decreased through 2018. This is likely due to them being short-term passionate conversations driven by relevancy through news and gov/cultural issues and initiatives.

Legend:
- **Water Usage**
- **Seasonal**
- **Climate**
- **Consumption**
- Local
- **Sustainability**
- **Organic**
- **Single Use plastic**
- **Food waste**
- **Environment**

X-axis: 01/01/2018, 01/02/2018, 01/03/2018, 01/04/2018, 01/05/2018, 01/06/2018, 01/07/2018, 01/08/2018, 01/09/2018, 01/10/2018, 01/11/2018, 01/12/2018

Y-axis: 0, 20000, 40000, 60000, 80000, 100000, 120000, 140000, 160000, 180000

33
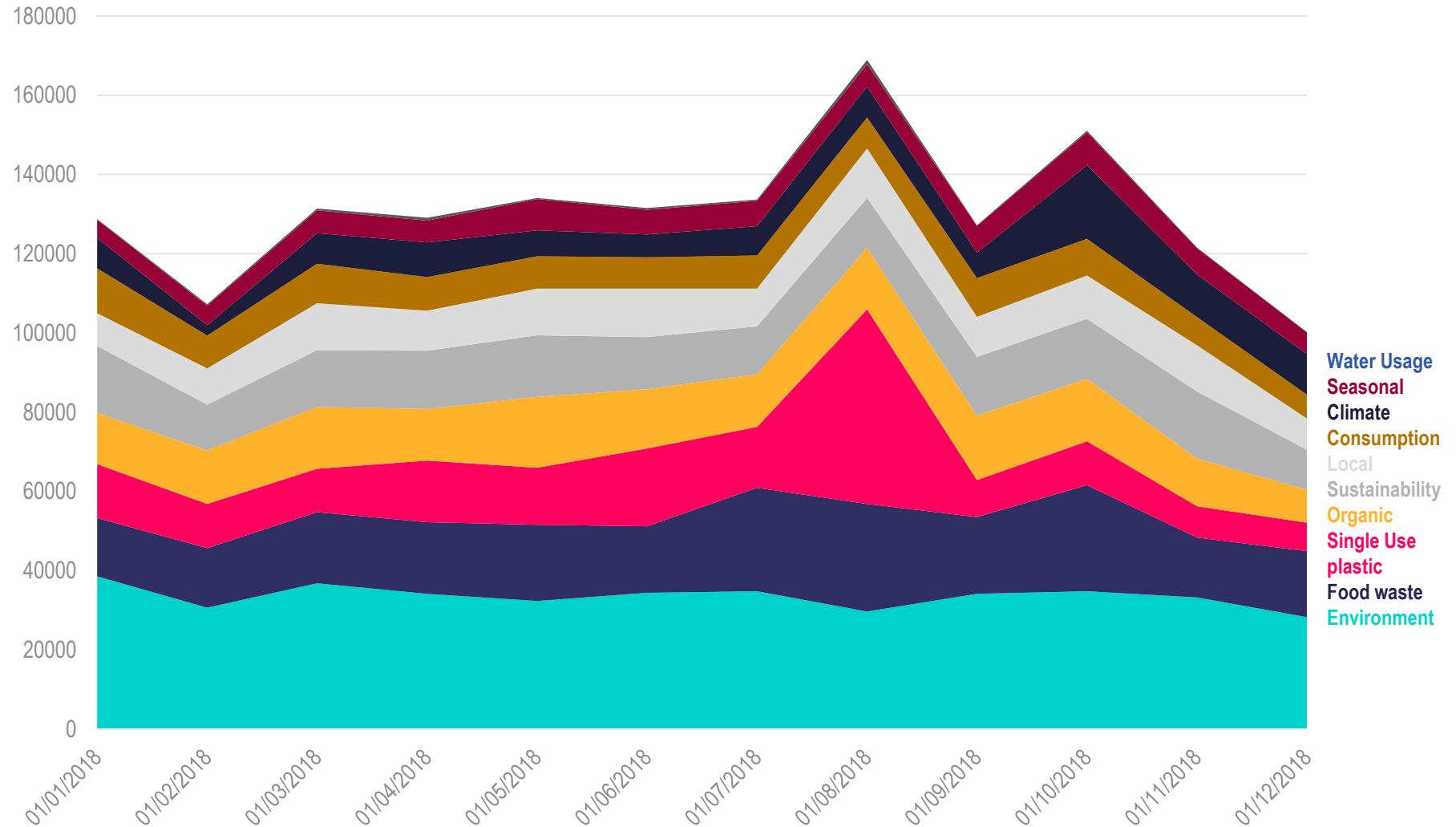
Sustainable conversations highlight the cultural shift to this being an issue affecting everyone and not just businesses

Food Banks

Q4 saw a 163% increase in mentions of Food Banks with this driven by Christmas (and food poverty) and political mentions

⚑ New Tech

The creation of lab grown/ cultured meats grew in popularity and interest when developments were published and alongside a growing trend of meat substitutes

Food System

Generic conversations around fast food are around the joy of this meal, however focusing on the foods, conversations are around its convenience and the effects of high consumption of this

⚑ Education

Education of the food system includes better food and nutritional labelling to protect and educate the consumer, and the understanding of the effects of food on the body and the environment

Farming conversations saw more negative than positive mentions in 2018 with mentions highlighting animal welfare and environmental effects of meat and dairy farming

⚑ Fast Food

⚑ Farming ⚑

Food system conversation overview

Food system conversations are quite similar to those within the meat reduction super topic with meat and dairy farming being one of the most prevalent topics of conversation; especially amongst the vegan community. Food banks also saw a huge increase towards the end of the year due to continued conversations around food poverty and political (and Brexit) conversations around this. Other core topics of conversation are dietary, and new substitutes to meat.

Food banks conversations exponentially increased towards the end of the year with this becoming a huge topic of conversation around food poverty and political relevance. Other topics saw a more stable mention trend through the year with GM/Lab grown foods picking up through the year.

This audience is:

- Repurposing facts or figures that align with their personal views

- Opinionated and the statistics from news sources are often used to bolster opinions. They are not afraid to disagree with articles claiming something they don't agree with, offering alternative facts that align with their own thoughts

- Vegans may not be screaming their dietary choices, but they feel strongly about farming and animal welfare and will share their points of view and related articles to backup their comments
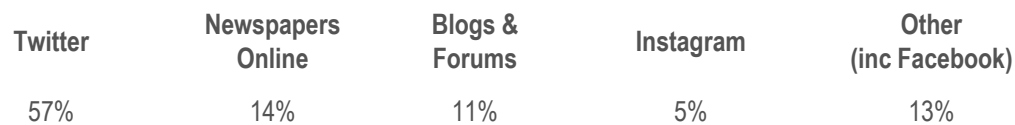
Twitter	Newspapers Online	Blogs & Forums	Instagram	Other (inc Facebook)
57%	14%	11%	5%	13%

Mention source breakdown

*tweet son Eating Disorder topic themes slide

| 13-17 | 18-24 | 25-34 | 35-44 | 45-54 | 55-64 | 65+ |
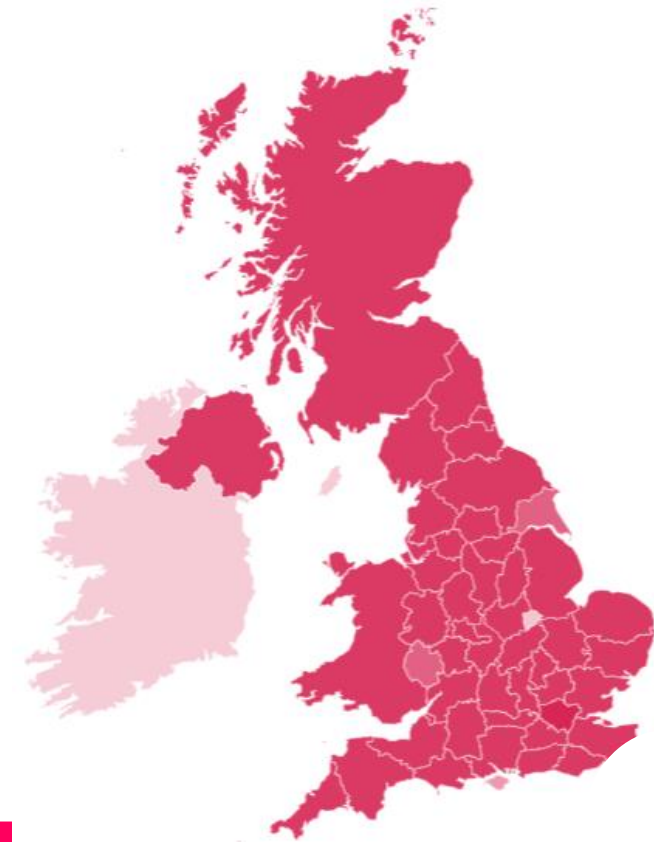
Location breakdown
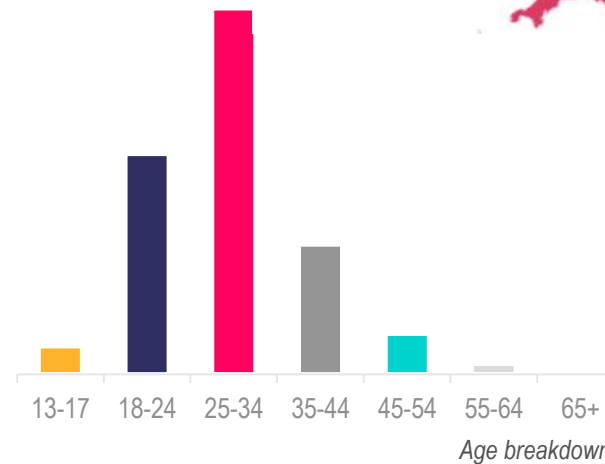
Age breakdown

47% women   **53% men**

Gender breakdown

Food bank gained interest following the recession and search has being fairly stable over the past 5 years, other food system topics are searched for sporadically aside from moderately high volumes for *fast food* as a result of an increasing demand for better convenience food and growing health concerns around conventional fast food.

Manning Gottlieb

Google Trends

Interest over time ⑦

Past 15 years

Past 5 years

- food bank
  Search term
- food waste
  Search term
- fast food
  Search term
- animal far...
  Search term
- food educ...
  Search term
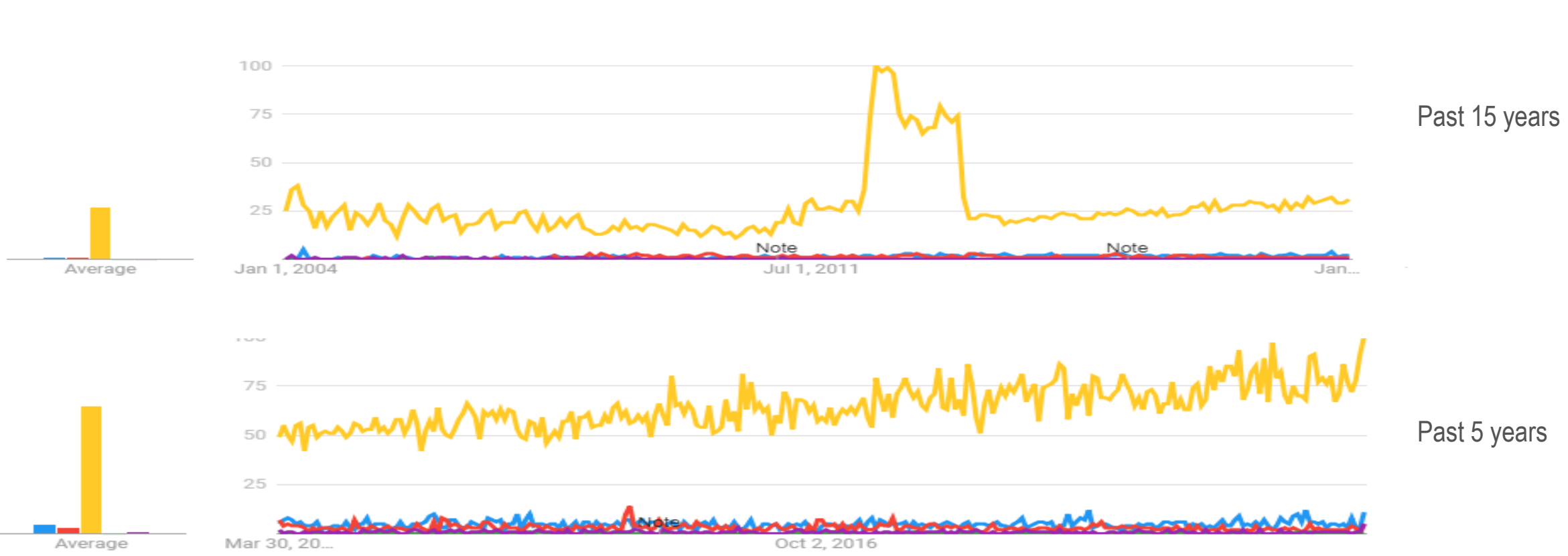
Source: Google Trends

Qual insights

Food system critics are concerned with a variety of issues joint with the demand for better education made available to consumers. The changes they have made to their lives as a result of their research into the system have had positive personal outcomes.

Capability
- Increase understanding of ethical / environmental issues of mass food production including animal welfare, deforestation, food waste
- Learning about nutrition / vegan diets
- Food bank givers are enabled by having resources to spare for others

Opportunity
- Cooking skills and disposable income for higher quality food / extra for food banks
- Barriers: labelling in food outlets; origin, organic, vegetarian missing on labels
- Avoiding convenience food is time consuming and requires planning
- Social influences generally offer opportunities through information / education

Motivation
- Range of disparate motivations from charity (food banks) to weight loss (need for clearer labelling) and environmental concerns (factory farming)
- Automatic motivations, however, are consistent with feeling better as a result of making changes

Behaviour
- The food system critics' concerns and behaviours vary from giving to food banks, affordability of food, consistency of food labelling, convenience food and the food supply chain as a whole.

Gaps
- More information on food bank donations
- Increase awareness of food system issues, educate on 'little things to make a difference'
- Improved labelling to include process, provenance, contents vegan

Information – research – share – educate – interrogate
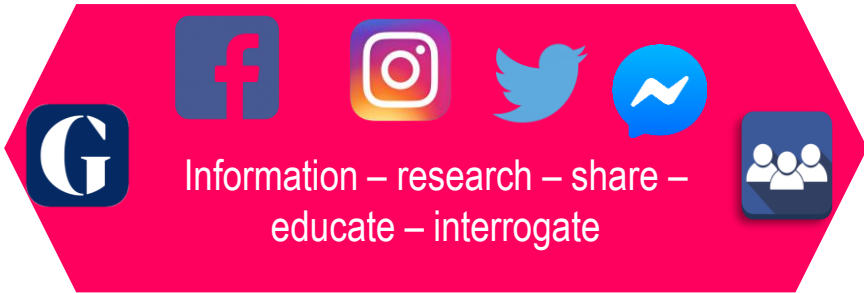
'I do care about over-farming[…] we have growing population of people who want to eat more and more and also a lot of the world where people moving from poverty into middle class and they want amazing food and amazing thing'
Nicholas, 57, London

Source: Bespoke qualitative interviews

Summary

- Issues with the food system span across a variety of disparate topics from controversies of food banks (bad that they are needed in a first world country v should be better supported by food industry), the side-effects of convenience food, the government's support of animal farming to inconsistencies of food labelling and general need for better educating consumers.

- Consumers pick-up on news articles in this space and share to raise awareness of the issues they feel strongly about.

- Technology creating new food sources (recent news of plant based/modified options not having the same name as meat counterparts) and the sustainable nature of this.

Difficult to predict future issues as these are less driven by specific, standalone motivations are more symptoms of the struggles consumers experience when wanting to adopt a healthier or more sustainable lifestyle.

Food education and labelling for nutritional and dietary requirements will continue to be important.

Foodie

2.5m mentions in 2018

#Foodie was mentioned 975.5k times in the UK whilst

#FoodPorn was mentioned 748.5k times

2m of the same topics in 2017

As a separate strand, outside of the 46 topics within the 4 super-categories, we attempted to capture general '*foodism*' on social and found a drop in mentions due to the Instagram API change in December limiting Hashtag tracking – between Jan – Nov. 60% of mentions came from Instagram.

#Foodporn
Foodie

39
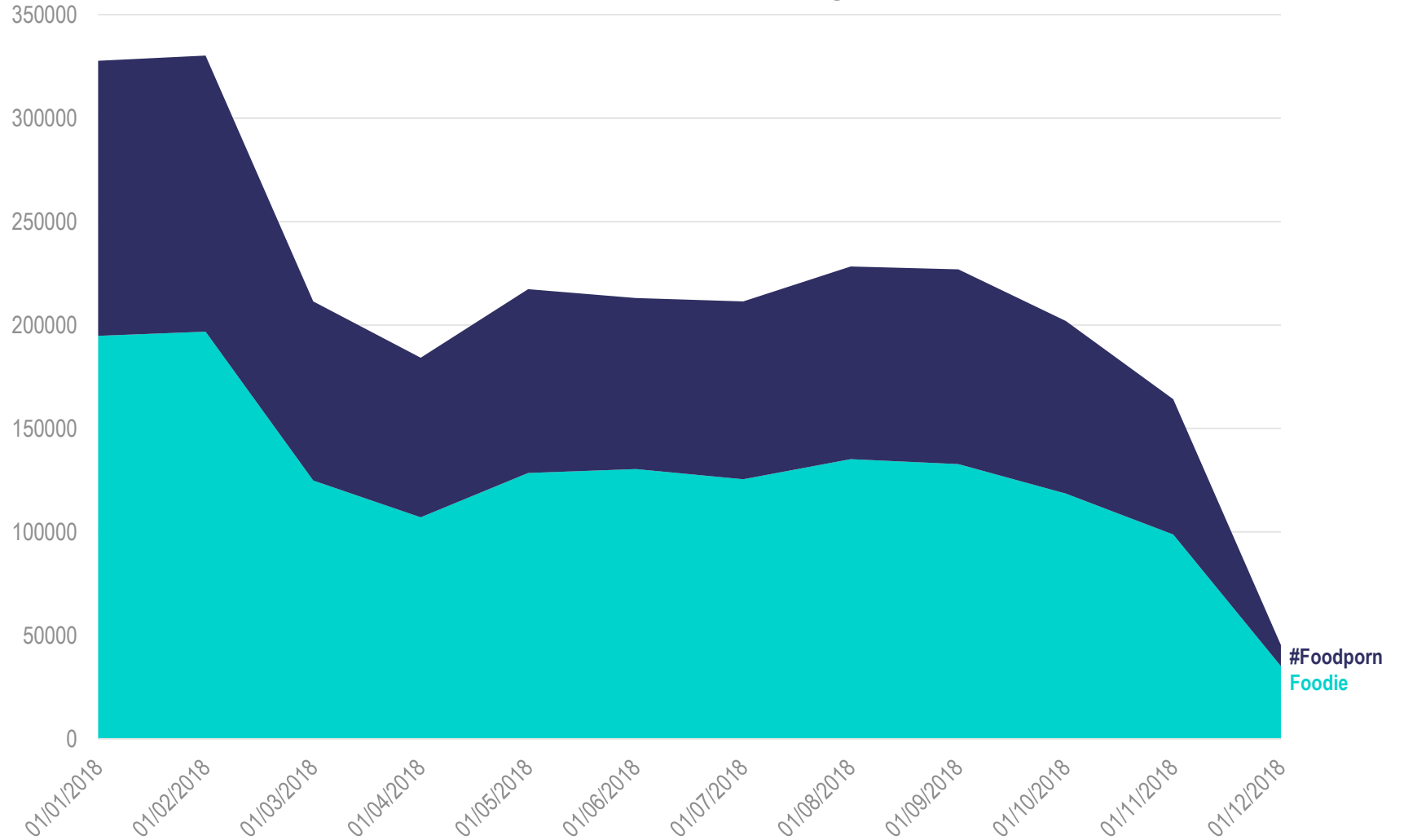
04
Influencer landscape

Influencers & advocates across the topics

across Twitter and Instagram

Consumers share content and engage with content from a range of sources spanning across news outlets, companies and professionals to celebrities, activists and bloggers as well as other consumers all acting to educate on, inspire and justify their behaviours.

Publications

Activists

Celebrities/ Politicians

Bloggers/ Influencers

Companies

Consumers

Healthcare/ Professionals Groups

Nutritional Factz

Health Channels   Meat Reduction channels   Food Systems channels   Sustainability Channels   All topics channels
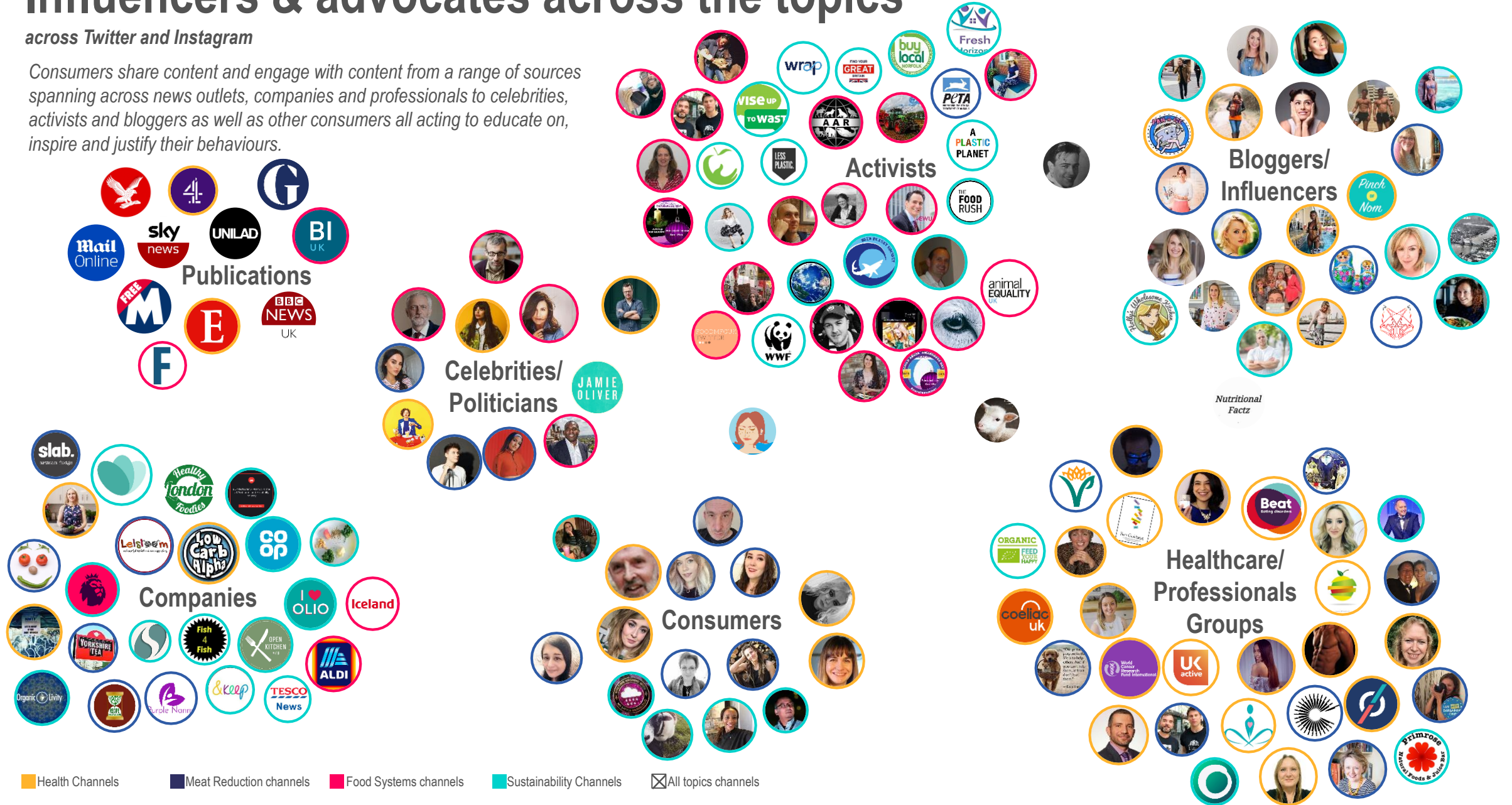
05
Summary

Voice of the people – qual film
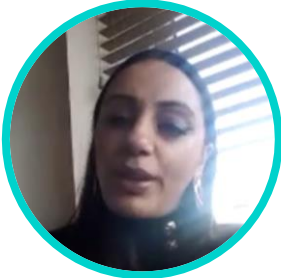
PLAY

Food trend development

All observed, mature trends have originated either in news coverage or influential posts. These tend to gain traction through shares and engagements. This in turn demands further news coverage and commentary. Alongside this is the pool of consumers with strong points of view (largely those who have already adopted the food trend behaviour) who discuss this as norm. At this point lower involved consumers would start to form their views and consider whether to adapt, reject or observe the trend further. Following this they are more likely to contribute through adding own content, creating or joining groups and group chats. Fads (like *trendy* foods) would show much faster drop-off with strong early/one-time engagement and little conversation or content in the second half of the diagram. Volume pf private social conversations are not measurable, but dynamic of content sharing is likely to mirror 'open social', potentially with stronger views.

Interest

Shares
Likes
Likes
Shares

Own Tweets
News

Own Tweets

Own Facebook

Groups

Instagram content

News
Blogs
Trusted sites

Early adopters

Point of view based both positive and negative These are strong advocates or influencers within the subject

Adopters of the POV have made a committed change (or attempt) as it's more public on this platform

Community of like minded. They may be advocates for a while and are looking for a place with likeminded people with less divisive opinion that Twitter (through more private conversations)

'Private/Dark Social'

Time

Food trend dynamic by topics

Awareness of importance (vertical axis: High → Low)

Personal relevance (horizontal axis: close → distant)

Health
Top of mind with visible benefits / drawbacks to personal wellbeing

Sustainability
High awareness through news coverage, articles and PR, making changes has less personal effects

Meat reduction
As a sub topic of the other topics, lower overall. Those who find it important harbour strong feelings about the issues

Food system issues
Niche subject with a disparate mix of sub topics driven by news articles; topics often require social / structural intervention

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As a general subject it is always top priority – with exceptions of indulgence (often coupled with a degree of guilt) – mainstream recognition of importance.
Trend implications: Taking care of personal health is a 'constant' in people's life with a link of awareness and increasing age fuelled by personal ailments, health scares and other effects of aging. However, what constitutes 'healthy' eating is contentious and as a result micro trends are volatile.

Subject area with high news coverage and mainstream levels of awareness of its importance. However, as with all topics affecting climate change or other wider global issues, the consequences are not immediately tangible and therefore require higher 'investment' from individuals to care as well as a virtuous leaning. As mainstream coverage is growing consumers learn more about the complex issues involved . Whilst news subject take turns (e.g. palm oil, meat productions, greenhouse gases, carbon footprint) the actions people take as a result remain largely the same: shopping locally, seasonally, closer to source and reduction of mass produced goods.

Meat reduction – veganism in particular – has a high social media profile and increasing presence in retailers with a growing number of consumers actively avoiding meat and meat products for health or environmental reasons. As such it is still more niche than the macro areas of health and sustainability. However, consumers who engage in the subject are highly engaged and perceive an array of benefits from personal health to animal cruelty and reduced carbon footprint.

Topics in this subject area vary and cover a vast landscape of issues, often related to lack of information, labelling issues or food processes and distribution. Single topics, like food banks or food waste may reach peak mainstream coverage, but many topics are impersonal and of limited personal relevance.

Recommendations

Overall we found consumers talk about the topics found on 'open social' in real life though they often adapt a different language when doing so among friends or family via 'dark social' or face-to-face. News articles and video content tend to act as a vehicle to deliver their message and further educate them in their areas of interest.

We need to be mindful of cultural imprinting on social media, where consumers share content to support the persona they like to show, not fully aligning with their actual behaviour.

Some of this was alleviated through qual interviewing offering more candid insights into the lives and journeys of a few consumers.

To complete the picture and future proof it is worth interrogating other data sources with behavioural data, such as:

- Purchase data (e.g. supermarket product sales data)

- YouTube data (e.g. recipe tutorials)

- Kantar World Panel (specific product sales)

Furthermore, we advise on interviewing representatives of the influencer landscape for deeper insights into the early stages of a trend and motivators into further amplifying and communicating the message to wider audiences.

06
Future proofing

Stage 3 – Future proofing

As part of this project Manning Gottlieb are also:

- advising on setting up social listening tools to monitor change and track emerging trends

- profiling and sizing audiences in media planning tools (YouGov profiles) for tactical activation

Thank you

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