Fi Global insights

Regional consumer trend updates: North America

Food ingredients North America

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FMCG GURUS
Consumer Experts, Insight Driven

Contents

This report examines FMCG Gurus Top Ten Trends for 2021 and how they are influencing consumer attitudes and behaviour in North America

Proactive living:
Consumers in North America are making conscious attempts to improve their dietary habits

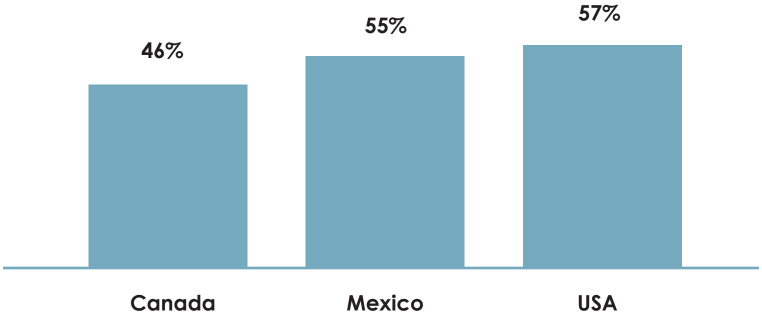
Over the last couple of decades, much attention has been given to the dietary habits of consumers in North America. Indeed, high levels of processed food consumption, excessive sugar intake, as well as the tendency to over-indulgence and not monitor nutritional intake, has resulted in the continued growth of lifestyle-related health problems, such as obesity. Much attention has been given to the long-term health risks associated with excessive weight; however, in the aftermath of COVID-19, consumers are being more attentive to their dietary habits for two reasons. Firstly, a growing proportion of consumers are becoming more conscious about weight gain because of increased levels of comfort eating in an era of uncertainty. Secondly, consumers recognise that excessive weight is something that potentially increases the risk of health complications arising from the virus. As a result, consumers in the region are making greater attempts to improve their dietary habits. Linked to this, the focus on improved diets will no longer be driven primarily by aspirational and appearance-based goals, but instead, the desire to reduce vulnerability to disease and illness.

When looking to boost their diets, consumers in the region will adopt a two-pronged strategy. Emphasis will be placed on maximising the intake of ingredients associated with a health boost offering beyond basic nutrition, as well as on reducing or eliminating the intake of perceived dietary evils. Concerns over dietary evils will result in consumers recognising that they enjoy a high level of non-essential eating and drinking occasions for comfort and indulgence purposes. Therefore, the war on sugar will intensify, as well as the adoption of dietary habits based around detoxing – such as switching from alcoholic beverages to non-alcoholic alternatives or seeking out products that are designed to flush out toxins within the body.

Although the second wave of the virus is passing in the region (at the time of writing), consumers are concerned about the lingering impact of the pandemic, as well as the risk of a third wave, and that it will continue to impact day-to-day lives for many years. As such, consumers will demonstrate more urgency than before when seeking out products to improve their diets.

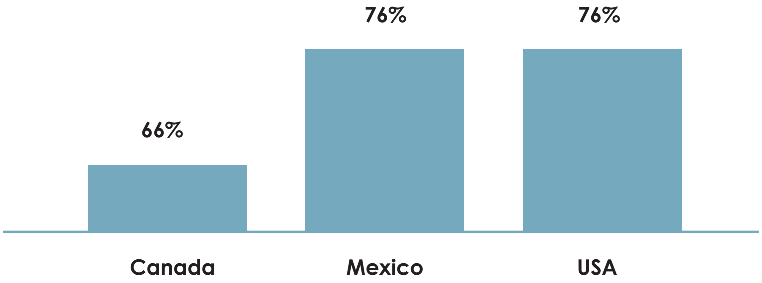
Consumers will want such products to be compromise-free from a taste and cost perspective, so that they can easily be incorporated into daily diets.

Proportion of consumers who say that they have become more conscious about their weight as a result of COVID-19 (February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Proportion of consumers who plan to eat and drink more healthily as a result of COVID-19 (February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Safe and secure:
Risk averse consumers want reassurance over safety and value of products

The impact of COVID-19 has been long-lasting and wide ranging, resulting in North American consumers questioning aspects of their lifestyles that they previously took for granted. For instance, consumers have become more conscious about how diseases can be spread and the safety and cleanliness of their surrounding areas. In times of uncertainty, consumers want reassurance over product safety. Moreover, they also want reassurance that brands have their best interests at heart and are being transparent and value-orientated. This is especially true in a time of reduced financial uncertainty, with shopping habits becoming more considered in a recessionary environment.

This means that it is crucial that brands are seen to be empathetic and responsive to evolving consumer need states. Moreover, they also need to demonstrate quality and value. This can be done through story-based marketing strategies designed to enhance perceptions of authenticity. Consumers want even more information on the products they are purchasing. This is driving demand for shortened supply chains that are not only seen as safer, but also healthier, better quality, and more environmentally-friendly.

Consumers want safety reassurances and demonstrations

61% of North American consumers say that they have been more attentive to the country of origin of products in the last twelve months (2021)

35% of North American consumers say that they have changed their attitudes towards packaging in the last twelve months (2021)

55% of North American consumers say that they are now more attentive to locality claims when buying products (2021)

44% of North American consumers say that they now want more reassurance about the safe handling of products (2021)

Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

In an era of uncertainty and in a time when consumers are demonstrating ethnocentric attitudes, it is crucial that consumers are provided information on product attributes such as country of origin, how ingredients have been sourced, how the product has been distributed, and how the product has been kept in optimal condition. As a result of this, consumers will also be more attentive to packaging designs.

As well as wanting reassurance about basic safety, consumers will also want reassurance over value. The pandemic has brought about a recession, which has impacted on levels of financial confidence – especially as many households feel that they do not have adequate savings to deal with an economic downturn. Many consumers are shopping around between brands and retailers in order to get the best possible deal, with brand loyalty on the decline. While consumers are shopping around, it is important to recognise that consumers are not necessarily seeking out the lowest priced product all the time. In some instances, consumers will be trading-up. Instead, consumers are adopting a form of hi/low consumerism where they will look to save money on certain items in order to justify spending more money elsewhere.

If consumers are to trade-up on products, they need reassurance that maximum care, attention, and safety has gone into the formulation and distribution of products.

of value along the whole of the supply chain

59% of North American consumers say they are now more conscious about other shoppers handling products in-store (2021)

73% of North American consumers say that they are now trying to save money on their food and drink bills over fear of a recession (2021)

71% of North American consumers say that they are now more willing to shop online compared to twelve months earlier (2021)

15% of North American consumers say that they are switching between retailers in order to save money (2021)

Source: COVID-19 survey, Q1 2021 (4,000 respondents)

Rediscovering health:
Consumers in North America are being more attentive to their immune health as they look to reduce the risk of disease and illness

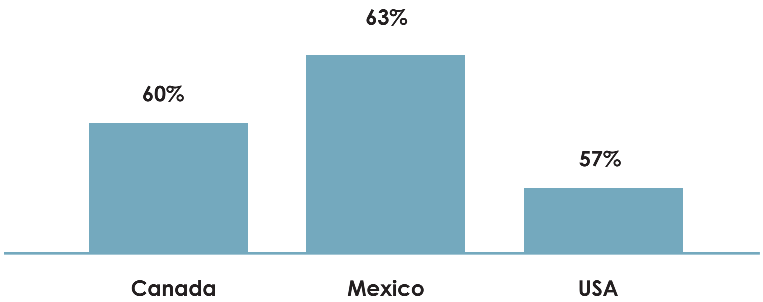
Consumers in North America have become more conscious about their immune health as a result of COVID-19. Indeed, concern is not just restricted to those associated with more vulnerable demographic groups, such as senior citizens or those with underlying health problems. Instead, society overall is questioning about how susceptible they are to serious health problems. This is being driven by many consumers recognising that their current diets and lifestyles are not as healthy as they could be.

As a result of this, consumers are adopting a holistic and long-term approach to health. Central to this, they are looking to boost their immunity as they see this as central to good overall health. Consumers are also adopting a prevention-over-cure approach and demonstrating an interest in health boosting products, even if they are not suffering from specific health conditions. Again, this is something that will have implications on their dietary habits. Adopting a holistic approach to health is important as they recognise that all aspects of health are interlinked and impact on one another. This means that they are being just as attentive to cognitive health issues as they are physical health issues.

Once considered something of a taboo topic, consumers have become more open about their mental health over the last decade, especially as mental health-related problems such as stress, anxiety, an inability to relax, and poor sleep health have become more common. Due to the frantic nature of modern life, consumers struggle to switch off from personal and professional obligations. Additionally, consumers often have several worries at one time, something that has been heightened by COVID-19. At the same time, consumers are recognising that poor mental wellbeing doesn't just influence mood and energy levels, but also directly impacts the immune system.

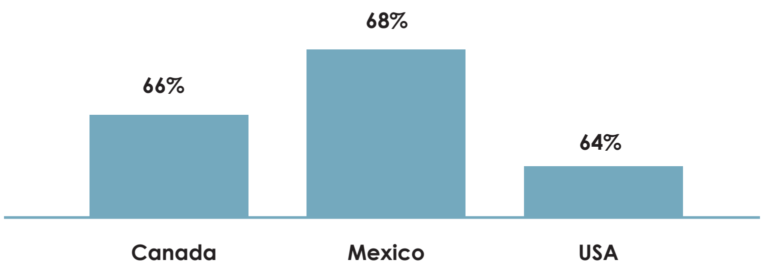
The desire to boost immunity will drive demand for functional and fortified products that contain ingredients associated with offering a myriad of health benefits. Consumers will demonstrate a preference for food and drink products over supplements. This is because whether the views are accurate or not, consumers associate food and drink as being more affordable, tastier, safer, and easier to incorporate into daily diets. When launching health-boosting products, it is crucial that claims on products are deemed to be credible and transparent, and not misleading or exaggerated.

Proportion of consumers who say that they are more conscious about their immune health as a result of COVID-19 (February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Proportion of consumers who say that they have become more conscious about the importance of trying to prevent health problems occurring as a result of COVID-19 (February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

The power of plants:
Consumers are seeking out substitutes as they look to modify their intake of dairy and meat

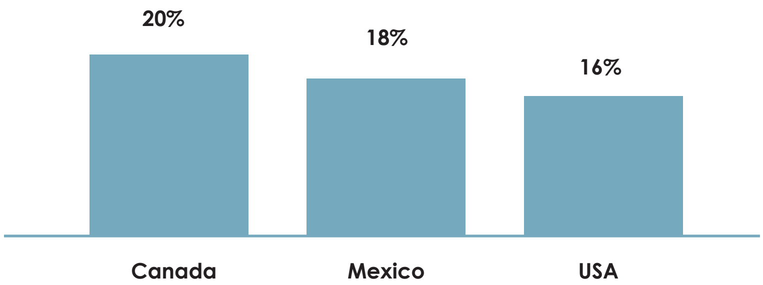
Something that started off as a niche movement driven by the Meatless Monday campaign at the turn of the century, around one in five consumers now identify themselves as flexitarian. This is a figure that is only likely to grow because of the pandemic and consumers re-prioritising what they eat and drink. Many consumers are now making conscious attempts to reduce their intake of meat and dairy, driven by concerns over health and the environment – two issues that are often interlinked by consumers.

Consumers associate dairy with being high in dietary evils such as fat and sugar (despite dairy also being high in protein and calcium), and excessive meat intake – especially red meat – with problems such as high blood pressure and cancer. Additionally, consumers tend to be more conscious about the environmental implications of cattle farming, such as levels of carbon dioxide and in the wake of COVID-19, consumers are also being conscious about animal welfare initiatives. As consumers become more conscious about these issues, they are seeking out plant-based alternatives which they deem to be better for them as well as the environment.

It must be remembered that despite their best intentions, consumers can often struggle to stick to dietary plans in the long-term, this is driven by high levels of self-entitlement. For instance, many consumers will switch to a flexitarian diet with the best of intentions but ultimately revert back to previous dietary habits after a couple of years. Many consumers admit that they would struggle to give up meat and dairy in the long-term. This means that if consumers are to switch to plant-based products in the long-term, it is crucial that these products are seen to replicate the experience of eating and drinking animal produce from a taste, texture, and juiciness appeal. Currently, some consumers have reservations about the sensory appeal of plant-based products, something that the industry needs to address.

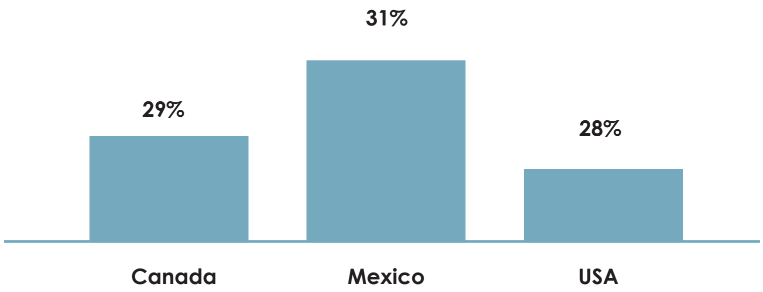
It is also important that brands are not seen to be making misleading claims around how healthy or natural plant-based food and drink is, as this could lead to a backlash within the industry in years to come.

Proportion of consumers who classify themselves as flexitarian (2019/2020)



Source:
Meat and plant-based protein survey, Q3 2019/Q2 2020
(4,000 respondents)

Proportion of consumers who plan to include more plant-based food and drink in their diets as a result of COVID-19 (February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Better for you, not best for you:
Consumers in North America want products that offer guilt-free indulgence

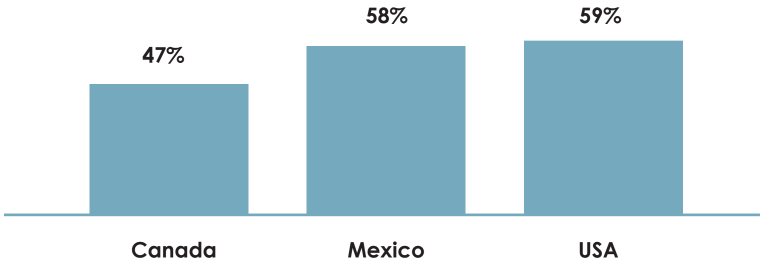
When evaluating the eating and drinking habits of consumers in North America, it is important not to overestimate the influence that health and wellness has on these occasions. Health may be an important topic for consumers, but the reality is that attitudes and behaviours towards the issue can vary. This is why the prevalence of lifestyle related health problems such as obesity continue to rise, despite consumers saying that they are actively looking to lose weight. This is because consumers will often prioritise more immediate need states linked to self-satisfaction when eating and drinking.

For instance, the healthiness of eating and drinking occasions tends to vary throughout the day. Consumers will be healthier in the morning and later on in the evening. In comparison, consumption habits in the afternoon tend to be governed by need states such as the desire for escapism, energy, reward, and to cure boredom. When it comes to these occasions, choice of product will be governed by taste and enjoyment – often at the expense of nutrition. In addition, high levels of self-entitlement means that consumers can often look to enjoy moments of indulgence where little-to-no attention is paid to nutritional intake.

Over the next twelve months, consumers will demonstrate two contradictory need states. On one hand, consumers will look to improve their dietary habits and modify their intake of dietary evils, due to concerns over whether current dietary habits increase the risk of vulnerability to disease. However, on the other hand, consumers will continue to turn to food and drink for moments of escapism to deal with the pressures of everyday life – occasions when consumption patterns are less likely to be governed by health.

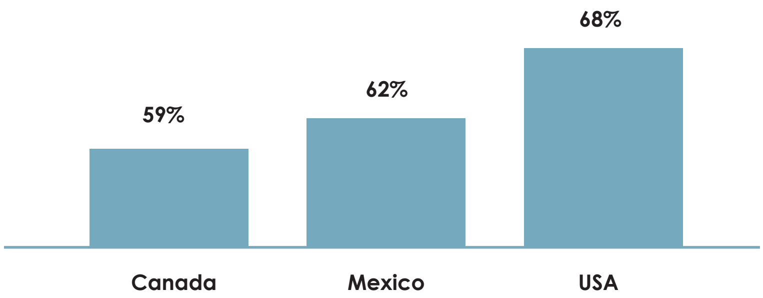
Ultimately, consumers want products that help bridge these two need states, allowing them to enjoy moments of escapism without them having to worry that such occasions conflict with wider health goals. This will drive demand for better-for-you products in impulse categories, resulting in the continued mainstream popularity of sports nutrition and free-from products.

Proportion of consumers who say that they plan to lose weight once the coronavirus pandemic has passed
(February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Proportion of consumers who say they have sought out comfort foods more frequently in the last month
(February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Natural blueprint:
Consumers want reassurance that ingredients in products are real and authentic and free from dietary evils

Consumers in North America are being more attentive to the ingredients used in food and drink products than ever before. This is because consumers want reassurance that products contain only ingredients that are deemed tried and trusted, real and authentic, and are seen to offer a nutritional boost. Additionally, consumers want to avoid artificial ingredients that they believe detrimental to their health and the wider environment.

Despite a plethora of new ingredients and innovations within the food and drink market over the last couple of decades, natural formulation remains the priority for consumers from an ingredient perspective. Indeed, this is often the first product attribute to be evaluated by consumers in the region after taste and price, which is then followed by evaluation of sugar content. Consumers associate natural products with a variety of benefits, such as products being healthier, more sustainable, and better quality. This array of positives means that such products are seen as easy to incorporate into daily diets.

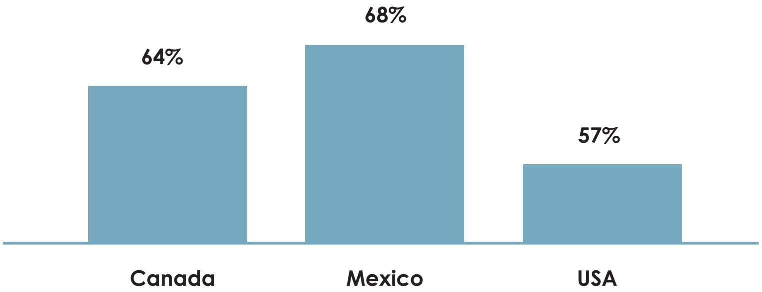
The importance of natural formulation is something that is also increasing in important as a result of COVID-19, as consumers seek out products that they deem green and clean. This is because consumers are adopting a back-to-basics approach to nutrition and seeking out products that they know and trust to boost health. It also relates to consumers becoming more concerned about supply chains, the state of the environment, and formulation processes. Natural claims are something that can help offer such reassurance. This is driving demand for products with streamlined ingredient lists and a variety of free-from claims. It is also driving demand for simplified nutritional labelling so consumers can easily understand the ingredients contained in a product.

In recent years, consumers have become increasingly skeptical towards marketing claims made by brands. As mentioned earlier on in the report, in times of uncertainty, consumers can become even more disrupting of practices and policies. This is especially true when it comes to the health and wellness market, with consumers believing that brands can make misleading claims around the healthiness of products to charge a premium price. Given the subjectivity that exists around the phrase natural – as well as related claims such as local and environmentally-friendly – it is crucial that brands look to validate such claims made.

71%
of North American consumers say that they are being more attentive to natural ingredients as a result of COVID-19 (February 2021)

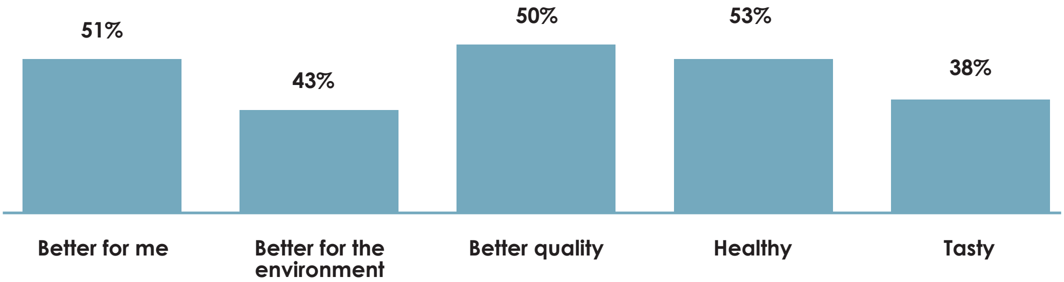
Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Proportion of consumers who say it is important that food and drink is 100% natural (2019/2020)



Source:
Clean label and naturalness survey, Q1 2019/Q1 2020
(4,000 respondents)

Why is it important that products are 100% natural? (2019/2020)
Consumers who say it is important products are 100% natural North America
Products are…



Source:
Clean label and naturalness survey, Q1 2019/Q1 2020
(4,000 respondents)

Taste first, think second:
Consumers in North America continue to seek out products that challenge their sensory perceptions

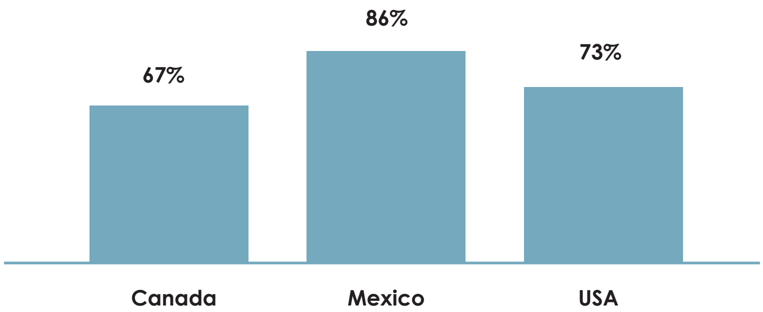
It must be remembered that the primary reason for turning to food and drink products continues to be taste and enjoyment. This is especially true in a post pandemic and recessionary environment as consumers turn to products for moments of escapism. It also shows that even in times of reduced financial confidence, consumers are still willing to seek out non-essential products and engage in impulse purchasing.

Consumers want products that challenge their sensory perceptions, something that can help reinvigorate products, brands, and categories, as consumers re-evaluate what they deem to be premium. The desire for experimental flavours is something that is often a form of self-expression. Consumers deem themselves to be liberal and sophisticated and want to present this to others, and food and drink is seen as an effective way of doing this – especially in an era of blogging about products. Consumers want new and novel flavours from around the world, flavours not synonymous with product categories and unusual hybrid flavours.

Such is the demand for new and unusual flavours, consumers are less satisfied with products that are simply stated as being from another country. Instead, consumers want flavours and products from specific regions within a country. They may have visited these places on their travels and want to replicate their cuisine experience back at home, or they may simply see such flavours as more sophisticated. Description is key when describing such flavours, meaning that story-based marketing is needed when launching innovative flavours to add a degree of authenticity.

It must be remembered that when launching experimental flavours, these flavours must be seen as more than a novelty and instead, something that genuine enhances the experience of the consumption occasion. Consumers are becoming more premium orientated and if an experimental flavour is seen as nothing more than a gimmick, it is something that can potentially deflate the premium credentials of a brand.

Proportion of consumers who say that they like products with new and unusual flavours (2020)



Source:
Flavours, Textures & Colours survey, Q3 2020
(4,000 respondents)

Reasons for liking new and unusual flavours (2020)
Top five answers

	Canada	Mexico	USA
I like to try new flavours from around the world	82%	69%	87%
I like trying flavours that I haven't tried before	74%	73%	72%
I like to try new flavours from specific regions from countries around the world	80%	52%	84%
I deem myself adventurous and like to try new flavours	60%	80%	67%
I like to be experimental when cooking	67%	56%	82%

Source:
Flavours, Textures & Colours survey, Q3 2020
(4,000 respondents)

The earth is clear:
Consumers are being more proactive in address environmental issues, as they recognise the link with health and wellness

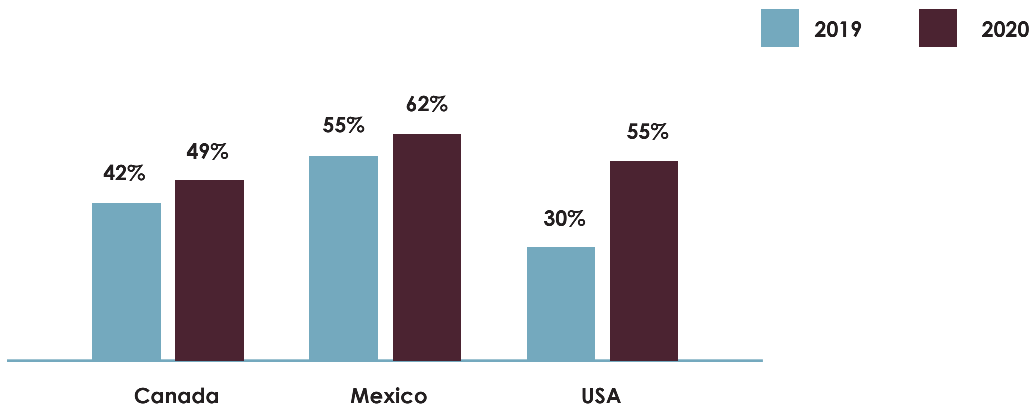
Consumers in North America demonstrate a high level of concern about the environment, and believe that levels of damage done may be irreversible. This is due to consumers becoming more educated about a degree of environmental issues, as well as having first-hand exposure to the consequences of an environmental landscape. As a result, consumers are worried that this is something that will impact on the quality of life for current and future generations. Concern for the environment is something that has intensified as a result of COVID-19, with consumers questioning whether the state of the environment is something that influenced the spread of the virus.

Consumers feel that big businesses are primarily responsible to damage done to the environment, brought about by high levels of corporate greed. As a result, consumers expect brands to be more responsive to environmental issues than ever before. Sustainability pledges should be at the heart of brand values and should be incorporated into every aspect of the supply chains. This includes monitoring the ethical and environmental behaviour of suppliers. Moreover, consumers want brands to be proactive in communicating this information.

At the same time, consumers are recognising that protecting the environment is a collective effort and that changes made to individual lifestyles can help benefit the planet. This is resulting in many consumers across North America changing their dietary habits to behave in a more sustainable manner. Whilst much attention has been given to the growth of plant-based diets, consumers are trying to behave green in other ways – such as making greater efforts to reduce food waste or looking to purchase only local food and drink. Consumers are also motivated to adopt more sustainable dietary plans because they are deemed to be healthier.

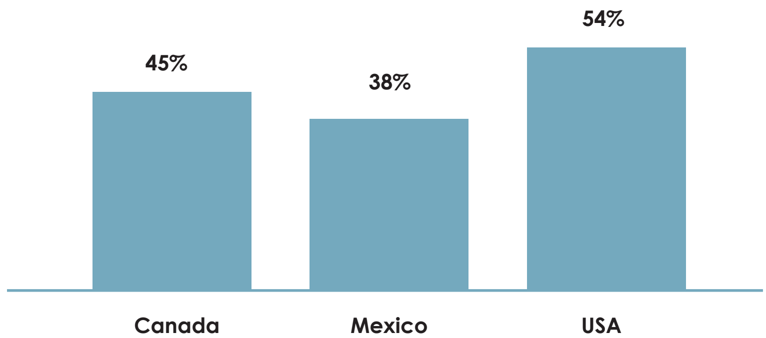
Although the environment is important to consumers, it is important not to overestimate the influence that such claims have on purchasing habits. Indeed, whilst consumers want to act in a sustainable manner, some can be conscious about making fundamental changes to their lifestyles, especially if this means compromising on taste or having to pay more for products. As a result, brands in North America must look for ways to take the hassle out of acting in a sustainable manner, offer incentives for acting in an environmentally-friendly manner, or position such products as being good for the individual and the environment.

Proportion of consumers who say that they have made changes to their diets in order to lead a more sustainable lifestyle in the last two years (2019/2020)



Source:
Sustainability survey, Q3 2019/Q1 2020
(4,000 respondents)

Proportion of consumers who say that they have become more attentive to sustainability claims as a result of COVID-19 (February 2021)



Source:
COVID-19 survey, Q1 2021
(4,000 respondents)

Menu for me:
Consumers want customised products to deal with their health goals

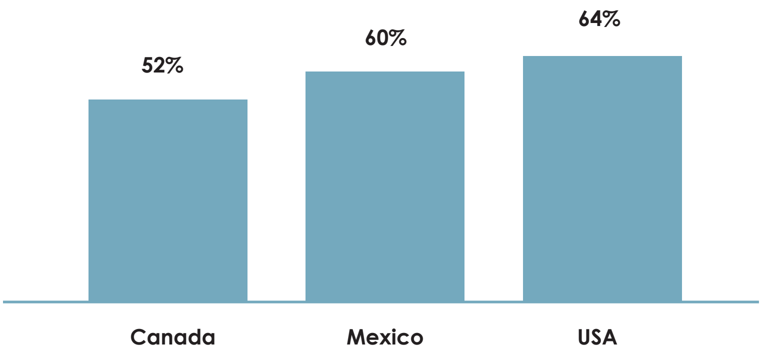
Consumers are becoming more conscious about their health than ever before. This is being driven by the growing prevalence of lifestyle-related health problems, an ageing society wanting to maintain a good quality of life, and reduce confidence over immune health in the wake of COVID-19. Consumers want products that offer immediate and effective solutions to their health and wellbeing issues. As a result of this, consumers can sometimes feel that nutritional products on the market are too generic and not suitable for their specific health issues. This is driving demand for personalised and customised products that help maximise health. One area of health which is currently untapped, but is something that consumers recognise profoundly influences the risk of disease and illness, is DNA and genes. Consumers feel that addressing DNA is something that can help maximise health. Currently, very few consumers are doing this.

The demand for customised products is driving the opportunity for innovations such as nutrition genetic testing. This is where consumers exchange DNA information through samples from saliva and other bodily fluids, in exchange for a health evaluation and personalised products and dietary plans to address areas of health which may need improving. Although consumers are not overly familiar with such a concept, when given a definition, many say that they would be willing to use. The key benefits associated with such innovations is that they can boost the immune system and help facilitate healthy ageing. Whilst consumers are willing to pay a premium for such innovations, expert and customised advice given face-to-face will be required and consumers will want reassurance over the effectiveness of such products.

However, when launching innovations such as nutrition genetic testing, brands need to take into account ethical considerations. For instance, some consumers can be conscious about whether such information is reliable or whether you can influence DNA-related issues. This means that brands must be fully transparent in communicating what can be achieved with such products. Security is also an issue, and consumers must be confident that any sensitive information sent to third parties is handled accordingly. Finally, consumers admit that they are conscious about whether such innovations could result in them receiving information about an unavoidable health problem later in life, as that will severely impact on their immediate mental wellbeing.

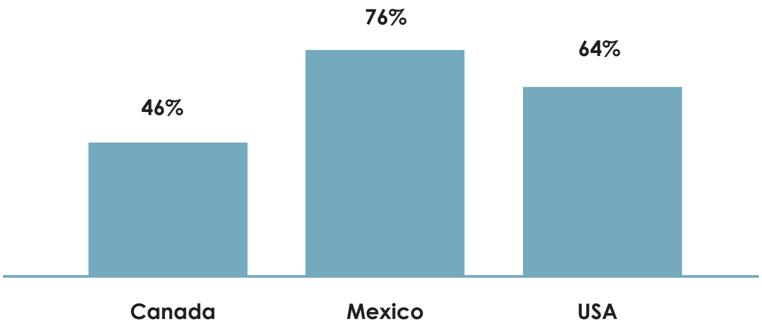
Nevertheless, as consumers become more health conscious, there will be a high level of demand for products that offer real-time and personalised information to deal with health issues.

Proportion of consumers who say that they are interested in food and drink products that are customized to meet their nutritional needs (2020)



Source:
Personalised nutrition survey, Q3 2020
(4,000 respondents)

Proportion of consumers who say that DNA and genes influence the risk of illness and disease (2020)



Source:
Personalised nutrition survey, Q3 2020
(4,000 respondents)

Eating out, dining in:
Consumers want menu innovation within the foodservice sector

Prior to the pandemic, eating and drinking out-of-home was a common pastime for consumers in North America. Out-of-home consumption occasions were the result of changing meal-time habits across the region and consumers also having high levels of self-entitlement. One of the major impacts of the pandemic was that consumers were unable to visit foodservice outlets and socialise with loved ones. However, even as the virus begins to retreat (at the time of writing), the implications of the pandemic on the channel remain longer lasting.

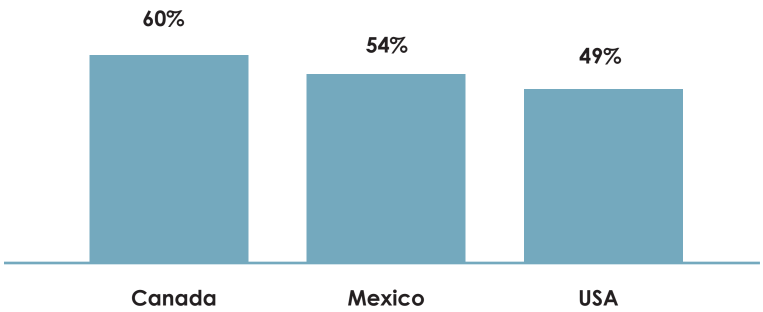
For instance, some consumers say that they are still conscious about mass gatherings and public places, and will stick to government guidelines on social distancing, even after such restrictions are lifted. Consumers also want reassurance that foodservice outlets have basic safety rules in place. However, two other challenges also exist for physical foodservice outlets on the high street. Firstly, the continued growth of direct-to-consumer channels has grown, meaning that many consumers can now enjoy foodservice occasions within the comfort of their own home. Secondly, consumers are turning to premium products from retail channels for at-home consumption occasions, meaning that retail outlets are more of a challenge for the foodservice sector than ever before.

This means that physical foodservice outlets need genuine innovation to stand out, protect again increased competition, and entice wary consumers back into physical outlets. New and exciting flavours that create a buzz will be important, with consumers wanting their sensory perceptions challenged. Additionally, consumers will want foodservice outlets to demonstrate their green credentials. This goes beyond having plant-based products on the menu and instead, demonstrating environmental pledges across the whole of the supply chain. After all, consumers want foodservice outlets that mirror their attitudes and outlook on life, and experimentation and sustainability are two attributes that they like to project.

Flavours that remind consumers of the past and simpler times will also appeal to those looking for moments of comfort from daily pressures. If launching retro products, it is important that they can compete with modern day offerings from a quality perspective.

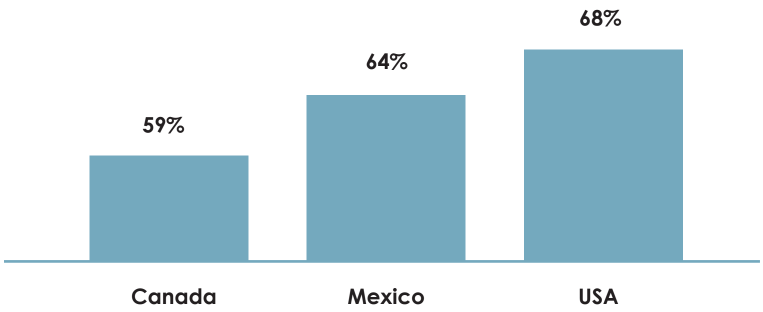
When focusing on getting consumers back into foodservice outlets, innovation is something that is more important than aggressive price discounting. This is because consumers want outlets that they feel match their attitudes and outlook on life and secondly, consumers can come to expect aggressive discounting in the channel, which can have negative implications.

Proportion of consumers who say that menu innovation is important when visiting foodservice outlets (2020)



Source:
Foodservice survey, Q2 2020
(4,000 respondents)

Proportion of consumers who say that as a result of COVID-19, these would like to see more food and drink stocked in foodservice outlets that remind them of the past and simpler times (2020)



Source:
Foodservice survey, Q2 2020
(4,000 respondents)

Key takeaways

- **Help remove the compromise associated with healthy diets:** Consumers are becoming more concerned about their dietary habits than ever before. At the same time, consumers can often struggle to stick to better-for-you dietary plans because they are associated with compromise. Brands need to launch better-for-you offerings that are deemed hassle-free.
- **Offer safety and assurance:** Consumers want reassurance that products are safe and are of good quality/value for money. This means that they want more information than ever before about the products that they turn to. Brands need to use story-based marketing and transparency to offer a degree of authenticity and quality assurance.
- **Enable consumers to address their immune health:** Consumers are becoming more concerned about their immune health, especially as they link it to other parts of their health. As a result, consumers are seeking out functional and fortified products that offer a health boost beyond basic nutrition. When launching such products, transparency around product claims are vital.
- **Ensure plant-alternatives are deemed compromise-free:** More consumers in North America are following flexitarian dietary plans for health and sustainability purposes. Despite their best intentions, consumers can struggle to stick to these diet plans. To minimise this risk, plant-based alternative must enable consumers to replicate the experience of eating and drinking animal produce from a sensory perspective.
- **Position products as guilt-free:** Consumers want to enjoy moments of indulgence to deal with everyday pressures. However, they also want to avoid these moments of escapism conflicting with wider health goals. To help achieve this, consumers want indulgent products with a variety of free-from claims which they deem to be guilt-free and conveniently nutritious.
- **Validate natural claims:** Consumers are being more attentive to ingredient claims than ever before and want reassurance that ingredients are natural, real, and authentic. To help validate this, brands need to engage in strategies such as streamlining ingredient lists, using only tried and trusted ingredients, and explaining why products are labeled as natural.
- C**hallenge sensory perceptions:** Consumers deem themselves adventurous and experimental products appeal to them as a form of self-expression. Brands should encourage consumers to challenge their sensory perceptions and re-evaluate attitudes towards product categories through new and innovative flavours that offer a premium experience.
- **Position sustainable products as win-win for consumer and the environment:** Consumers are concerned about the state of the environment and want to make changes to their diets. They also want brands that match their attitudes and outlook on life. At the same time, they want sustainable products to be hassle-free, meaning products must be positioned as offering some benefit for the consumer beyond acting in a sustainable manner.
- **Offer customised solutions:** Consumers want nutritional solutions that they associate with offering maximum efficacy. This creates the opportunity for launch new and innovative solutions around personalised products based on DNA samples. When launching such products, ethical considerations need to be factored in.
- **Develop menu innovation within the foodservice sector:** Consumers want foodservice outlets to offer a genuine experience. This means that menu innovation is important in order to create differentiation and identity. Leveraging experimental flavours and sustainability credentials can help achieve this.

Surveys used in this report

- COVID-19 survey, Q1 2021 (4,000 respondents)
- Meat and plant-based protein survey, Q3 2019/Q2 2020 (4,000 respondents)
- Clean label and naturalness survey, Q1 2019/Q1 2020 (4,000 respondents)
- Sustainability survey, Q3 2019/Q1 2020 (4,000 respondents)
- Flavours, Textures & Colours survey, Q3 2020 (4,000 respondents)
- Personalised nutrition survey, Q3 2020 (4,000 respondents)
- Foodservice survey, Q2 2020 (4,000 respondents)

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