



**Radically
Better
Food** 4 Imperatives for
Regenerative Brands

BBMG

LOBESCAN

Over the past year, our relationship with food has been transformed in ways that many of us have never known.

It's at the heart of how we are facing life with more stress and less certainty. We're experimenting with new choices, rituals and routines. And we're embracing food as a primary outlet for wanderlust and discovery through a time when we've been cut off from one another. Food has become one of the most significant ways we are navigating the emotional, physical, and spiritual disorientation of pandemic life.

This has us asking questions about what's working and what's not. What's serving our needs and what's not. What do we want to leave behind and what are we eager to bring forward?

We are all consumers of food. It connects our everyday choices with systems that directly impact our survival. And nearly every major issue we can point to – physical health, mental health, environmental sustainability, social justice, economic equality, human rights, animal rights – draws a line straight through it.

Given the integral role food plays in our lives and profound influence it has on culture, now more than ever **we need food brands to help create a radically better future** for people and planet.

In BBMG and GlobeScan's recent study, Radically Better Future: The Next Gen Reckoning for Brands, eight in ten respondents agreed that **“companies and their brands are an essential part of the solution for the challenges facing humanity today.”** In this companion, the Radically Better Food report, we dig deeper into our data from 1,000 people across the US and explore new questions in a focus group with more than 100 food consumers across the nation, along with in-depth interviews with brand leaders and industry experts to understand what matters most for how we eat – now and next.

What you'll find in the following pages is a picture of consumers who are intrigued and excited by rapid innovations in the food industry, but have healthy skepticism as well. You'll meet consumers who are ready for new, more sustainable, equitable, and nourishing ways of eating – and who are seeking brands they can trust to deliver on these desires.



“Together, we can work towards a food system that not only feeds us but also celebrates life.”

Petra Hans, Head of Portfolio,
Agricultural Livelihood,
IKEA Foundation

4 imperatives for Regenerative Food Brands

With the confluence of a global pandemic upending our food habits, climate change affecting our global food supply chains, and new levels of access to information and influencers, today's consumers are more aware than ever of the urgent need to change how we eat.

Food systems contribute a third of global GHG emissions originating from human activity¹. Scientific models show that food systems will be significantly impacted by climate change² and it will be impossible to reach global climate goals without major changes to the way we eat³.

The good news is that from soil to store to packaging to plate, positive change is underway. But for a radical shift to a world of Regenerative Food Brands – brands that are aware, additive, and alive in culture – brand leaders must unite new food systems and new food stories to inspire new norms, new expectations, and new possibilities together.

¹ "Food systems are responsible for a third of global anthropogenic GHG emissions." Nature Food. Crippa et al. <https://www.nature.com/articles/s43016-021-00225-9>

² "Climate Change, Food Supply, and Dietary Guideline." Annual Review of Public Health. Binns et al. <https://www.annualreviews.org/doi/abs/10.1146/annurev-publhealth-012420-105044>

³ "Global food system emissions could preclude achieving the 1.5° and 2°C climate change targets" Science. Clark et al. <https://science.sciencemag.org/content/370/6517/705>

Our research reveals **four brand imperatives** along the food journey that can point the way forward.

1 Make the
Source 
Relevant P6

2 Make 
Better Food
Accessible P11

3 Make the 
Experience
Empowering P16

4 Make 
Consumption
Circular P21

1

Make the Source Relevant

To meet the urgency of this moment, companies are taking innovative approaches to food production.

A radically better future of food requires new ways of growing, harvesting, making and distributing the food we eat. But when the farms and the oceans and the factories are so far removed from our dinner plates, how do we make these positive innovations matter to consumers? How do we demystify claims like organic, plant-based, and upcycled? And what the heck are we going to call “meat” that doesn’t come from an animal? Like never before, the source of the food we eat is becoming an essential part of the story.

Where does my food come from?

In spite of the sometimes bewildering swirl of claims and innovations from food brands, when it comes to sustainable food, consumers are here for it.

Two-thirds of consumers (66%) believe that **a company should be responsible for** ensuring all materials it uses to make its products have been produced in a socially and environmentally responsible manner. 59% of young people under age 30 **often or always consider how responsible a brand is**

when choosing food and drinks, compared to 41% of people over age 30. 73% of consumers believe **brands should provide clear information** to consumers about how a product was made, who made it, and what's in it. And 37% want companies to create **new products that are better for both people and the environment.**

"I would like us to focus on improving the way the animals are treated, the way the people are treated who pick the fruit and the packaging the food comes in."

Millennial Female, Florida



59%

of young people **often or always consider how responsible a brand is** when choosing food and drinks

What's in it for my health?


Consumers we spoke to were excited about how better sourcing practices improved their health, intuiting positive benefits of sustainable sourcing even before learning all of the details.

By more explicitly connecting the way food is made to why it matters for my health, my values and my life, brands can offer more relevant brand benefits and engage consumers in supporting better sourcing and production practices.

Food perceived as healthy:

People see “plant-based, organic, unprocessed, clean label, close to nature and non-GMO” as signifiers of health for their families and positive impact for the world around

Themes from our focus group with 100 US consumers. This list is not an exhaustive categorization of food terms.



"The core of every new food that we produce must be that it is both good for people and good for the planet. These are the new table stakes."

Giannella Alvarez, Former CEO of Harmless Harvest and NYU Stern School Center for Sustainable Business Advisory Board Member

Can I trust new sources?

Brand trust is paramount in getting people to try new, sustainable food innovations.

New food options, from animal-free proteins to 3D printed foods to cell cultured (aka lab-grown) meat and seafood has sparked the curiosity of consumers who quickly recognized environmental and animal welfare benefits, but also expressed concerns about potential negative health effects.

For cell-cultured meat and seafood, focus group consumers craved more information about the origin of the meat (cells), more independent studies about food health and safety, clearly demonstrated ethical standards from the companies behind the products, and a sense of familiarity with the products.

NEED MORE INFORMATION:

"I would need to know how they are produced, what kind of ingredients/chemicals are used and how they taste compared to other meat."

Millennial Male, New York

WEIRDS ME OUT:

"I'm not going to lie, [cell-cultured meat or seafood] kinda of weirds me out. But it wouldn't put me off from eating it, particularly if we could stop the mass killing of animals for food."

Gen Z Male, Pennsylvania

Perfect Day has innovated animal-free dairy that isn't plant-based — it's made with precision fermentation: creating dairy proteins from microbes, with no cows involved.



In Singapore, **Restaurant 1880** offers lab-grown chicken made by **Eat Just**.



British company **Caviar Biotech** is developing the world's first lab-grown, "compassionate" caviar to deliver on a growing desire for ethical luxury products.



And Israel-based, cell-cultured and slaughter-free meat company **Aleph Farms** established the "Z-Board," a Generation Z advisory board to gain insight from younger consumers and build a culture of trust and transparency.



The Opportunity:

Tell an origin story rooted in human needs and priorities

As mainstream food shoppers increasingly ask questions about the social and environmental sourcing practices behind the foods they buy, brands must tell stories of the food journey that differentiate their brand and unlock relevance.



CASE STUDY →

BBMG helped Marine Stewardship Council highlight the importance of sustainable seafood sourcing

Make Better Food Accessible

People want to feel good about how they eat. Savor the flavors. Enjoy the variety. Improve their health.

Yet sustainable and healthy living does not always feel accessible, affordable or convenient to everyone. When it comes to living a more sustainable lifestyle, many people in our research expressed that the greatest barrier, after price, is variety. Many consumers make food choices depending on their immediate food environment and the options they can access easily. Radically better food brands must work tirelessly to remove barriers to access and design for food equity.

Can I afford better food?

Eating sustainably isn't always within reach.

In our research, 48% of US consumers feel **guilty about their negative impact on the environment** and nearly 1 in 3 (28%) say they have often felt **ashamed about living an unhealthy lifestyle**. Yet addressing that guilt isn't always perceived to be easy – or affordable. For many people, **cost is the highest barrier to**

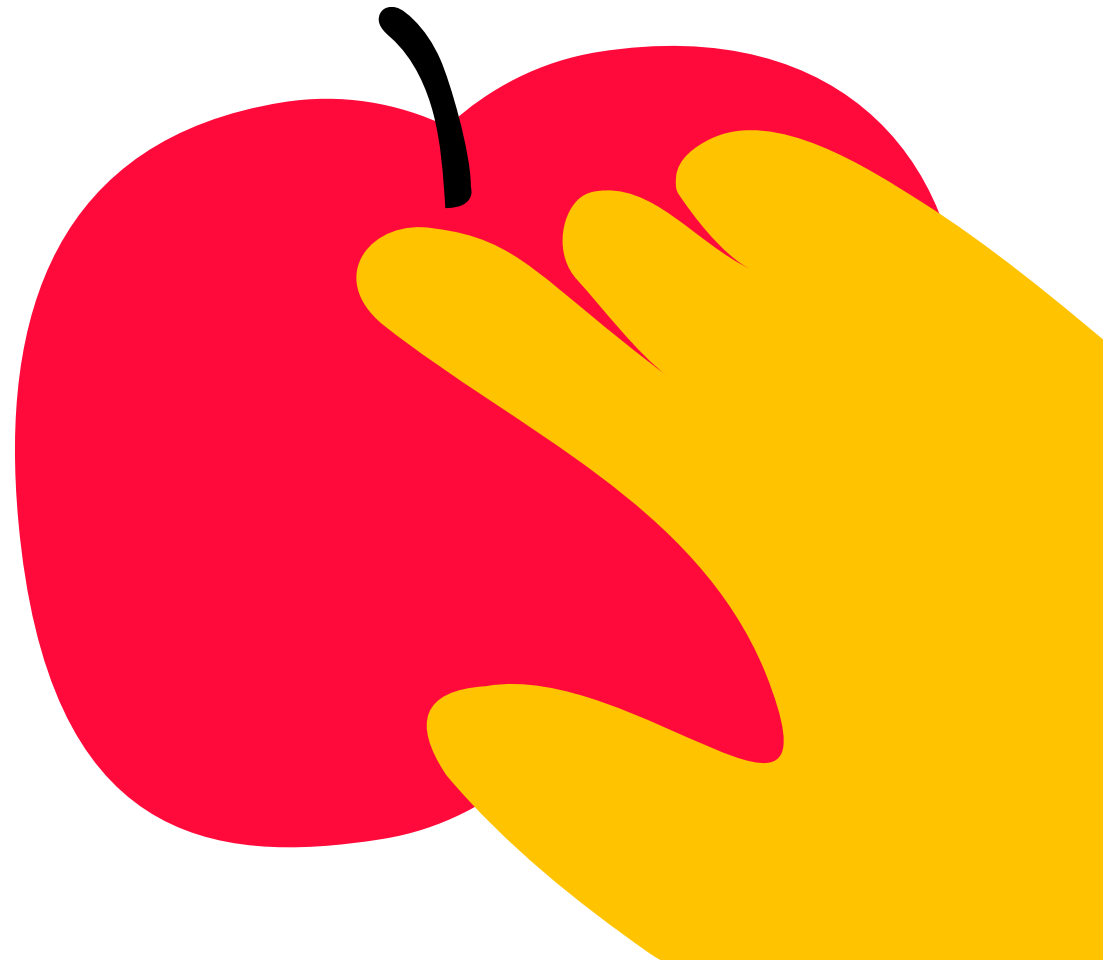
accessing their preferred foods, and 55% say the best way for companies to help us live more healthy and sustainably is to **"make more affordable products and services that are better for people and environment."**

"Being environmentally friendly just adds to the cost and sometimes you never know if it's worth it."

Millennial Male, Ohio

55%

of consumers wish sustainable products were more affordable



Is it fresh?

Fresh food corresponds with better taste and better value.

While we know that price and taste¹ are table stakes for designing food brands, when it comes to how consumers talk about the foods they want, it's all about freshness. Particularly in the meat, dairy, and produce categories.

In addition to quality and taste, freshness gives people confidence their food (and money) won't go to waste between shopping trips or food deliveries.

Priorities by category²:

Meat: freshness, non-GMO, health

Dairy: quality, price, freshness

Produce: freshness, quality, longevity

Snacks: nutrition, price, taste

¹Among US consumers in our study, 39% named price and taste as the most important, 34% named health at a top priority, and 28% named environmental factors as their primary concern.

²Themes from our focus group with 100 US consumers.



Everytable is on a mission to transform the food system by making delicious, nutritious food accessible to everyone, everywhere. They sell super fresh, grab-and-go salads, wraps, hot plates and snacks in “food deserts” like South LA at prices competitive with fast food.

In Singapore, where farmland is limited and 90% of food comes from abroad, **Citiponics** is a vertical rooftop system that operates atop parking garages and yields up to four times more fresh produce than conventional farming.



Walden Local Meat, a B Corp in Massachusetts, saw their community supported agriculture (CSA) business nearly double during the COVID-19 pandemic as consumers sought new sources of local fresh food delivery while global food supply chains were thrown out of whack.

Does it meet my needs?

Breakthrough brands empower consumers' desire for a healthy life, healthy planet, and no compromises.

While some of the consumers we spoke with identified with paleo, keto, and other diet-based communities or food tribes, the greatest affiliation we heard was to **meat lovers and foodies**. Descriptors that indicate a love and appreciation for food rather than its restriction.

And yet, 87% of US consumers would like to change their lifestyle to **be more healthy** by moderately or greatly improving their physical and mental wellbeing. And 78% would like to change their lifestyle to **be more environmentally friendly**

by reducing their impact on the environment and the climate moderately or by a **great deal**. Brands creating more versatile food options and environments can deliver a win-win for consumers seeking to balance a healthy diet with freedom of exploration and enjoyment.

“Our philosophy is that people aren't going to change. They like what they like, and we've got to give them what they like. It's on us to make it a better way and not on consumers to wake up and not love chocolate or not love burgers.”

Jessica Appelgren,
VP of Communications,
Impossible Foods

The Opportunity:

Design for accessibility without compromise

Rather than compromise on quality, taste, ingredients, or freshness, consumers are looking for it all. And with new technology like rooftop greenhouses, ghost kitchens, delivery robots, and 3D printed food, brands are finding new ways to deliver better options without compromise. Designing radically better food means increasing access to healthier and more sustainable foods at the right price, in the right place and at the right time.



CASE STUDY →

BBMG helped Mizkan create the brand ZENB, a new line of nutrition-packed, whole-veggie-to-go snacks.

3

Make the Experience Empowering

People are cooking more and experimenting more – and they want to be engaged on the topics that matter most. Online shopping, social media influencers, and direct-to-consumer shopping means consumers are seeking – and expecting – more information about their food. They're gaining more comfort and confidence in taking control of their food choices. And they're going beyond just what companies say to source and share advice from friends and family, dietitians, doctors and food journalists.

Do I feel confident?

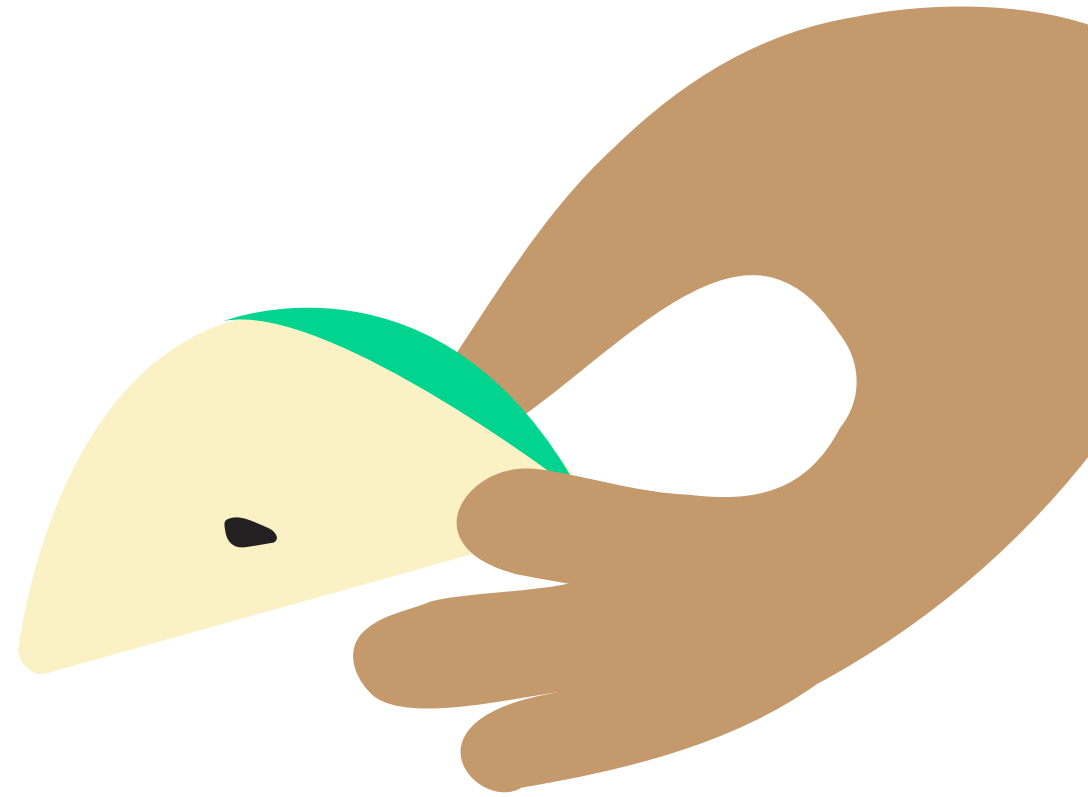
In the past year, as more people have been cooking and eating at home, they've also become more empowered to make informed food choices.

While the circumstances of the COVID pandemic have forced many of us to get reacquainted with our home kitchens, the upshot is that consumers are developing a greater sense of confidence in their ability to make food decisions. This reinforces a recent survey finding that 35% of consumers **"found a new passion for cooking during the pandemic."**¹

"I enjoy food more now because I am the one preparing it and I know how much work went into it."

Female Boomer, Ohio

¹ Acosta Custom Shopper Survey July 8-15, 2020, Foodservice sales and projections = Kantar, Technomic Wallchart, Datassential Forecasting Tool; Cooking attitudes (new passion, sick of cooking) = Datassential May 2020




When we asked what food shoppers prioritize, the US consumers we spoke with often or always consider the following:

- 51%** Presence of hormones, antibiotics and/or chemicals
- 45%** Presence of genetically modified ingredients
- 43%** How responsible a food/beverage brand is
- 43%** The treatment of animals raised to produce food/beverages
- 38%** Environmental impact of food/beverages

Can I break free?

People are seeking more control over their food habits and environments.



“As humans, we tend to eat what is nearby. To nibble on or grab what is within close proximity. We need more businesses making those food environments different from what they look like today, which is saturated with brands that deliver toxic calories – fast food, soda, snacks, etc. – oftentimes with no option for fresh, wholesome, affordable food.”

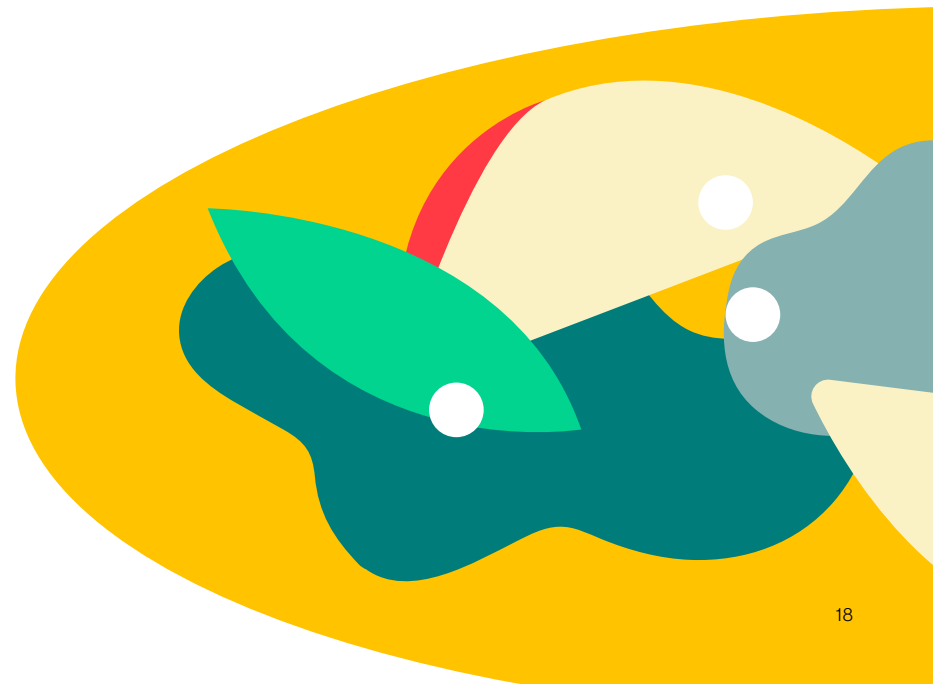
Hans Taparia, Co-Founder at Desert Bloom and Co-Founder of Tasty Bite

When asked about what they would like to change in their diets, many responses weren't so much about "what" they would eat differently, but rather the frequency with which they would eat. We heard a range of perspectives about elevated snacking and breaking free from the three-meals-a-day routine.

FLEXIBLE HOME COOKING:
"I am spending more time at home because of the pandemic, so yeah, I am cooking and eating more meals at home ... I try to do several small meals throughout the course of the day. I don't like to keep eating until I feel super full."
Millennial Male, Massachusetts

FREQUENT SMALLER MEALS:
"Instead of the old days of three full meals, if you eat smaller meals throughout the day, you will feel fuller longer."
Gen X Female, Florida

HEALTHIER SNACKING:
"I want to have more healthy snacking throughout the day like nuts and fruit."
Millennial Female, Michigan



What's the trade off?

While many consumers and experts are cheering the rise of plant-based meat alternatives as a silver bullet for the environment, others see it as an affront to simple ingredients and farming traditions.

Similarly, while many view grocery and meal kit delivery as a perfect solution to make wholesome eating more accessible, others are appalled by the excess packaging, extra transportation miles and prohibitive prices. There is no silver bullet (yet),

and consumers remain frustrated by the trade-offs. Brands who are innovating to meet the evolving needs and desires of today's consumers can embrace the criticism as a way to raise their ambitions.

"I think plant-based protein is healthier and reduces carbon footprint."

Male Boomer, Maryland

vs

"Plant based meats are merely highly processed foods with better marketing."

Millennial Male, Texas



Hooray Foods and **Nowadays** defy the highly processed criticism of many meat alternatives by making plant-based meats from simple, common ingredients everyone has heard of.

Hungry Harvest is a produce delivery company that's on a mission to put more plants on more plates for more people across America. They rescue fruits and vegetables that would otherwise go to waste and work to close loopholes in our food system to get food to people who need it most.



Applegate has launched Well Carved!™, a line of products that blends organic meat with whole vegetables, legumes, and grains so meat lovers can enjoy burgers and meatballs that incorporate wholesome veggies while creating 51 percent fewer greenhouse-gas emissions.



The Opportunity:

Innovate to shift consumer angst to agency

As we navigate the constraints of COVID life, freedom and exploration through food has become even more important. With more informed and confident consumers – and a desire for holistic food benefits across freshness, taste, health, price and positive impacts for people and planet – consumers are hungry for a deeper conversation with brands and better alternatives that improve their lives.

CASE STUDY →

BBMG helped Hungry Harvest rebrand its rescued vegetable delivery box for consumers seeking variety and creativity



Make Consumption Circular

When it comes to creating a healthy, equitable and sustainable future for food, it's not just how our food is cultivated that matters.

How it's packaged, consumed and shared are essential decisions as well. Over the past year, we've all become increasingly aware of how the food we need is being packaged (both the products and the boxes that show up on our doorsteps) and of the tragic consequences of food waste at a time when more Americans are facing food insecurity and one in six children goes hungry every day.¹

As we consider the full impacts and opportunities for designing a radically better future of food – particularly for marginalized and low-income populations – brands have an opportunity to take accountability for the full lifecycle of food production, distribution, consumption, waste and beyond.

Is packaging necessary?

When it comes to behaviors associated with sustainable eating, recycling has long been at the top of the list.

Consumers see plastic as an obvious problem and consider recyclable packaging as one of the basics for brands – and many of the people we spoke with expressed a strong desire for less packaging of their food. With bulk food shopping on the rise and BYO containers becoming more common at grocery stores and even

fast-casual restaurants, now is the time for brands to embrace circular design principles to deliver more nourishment with less waste.

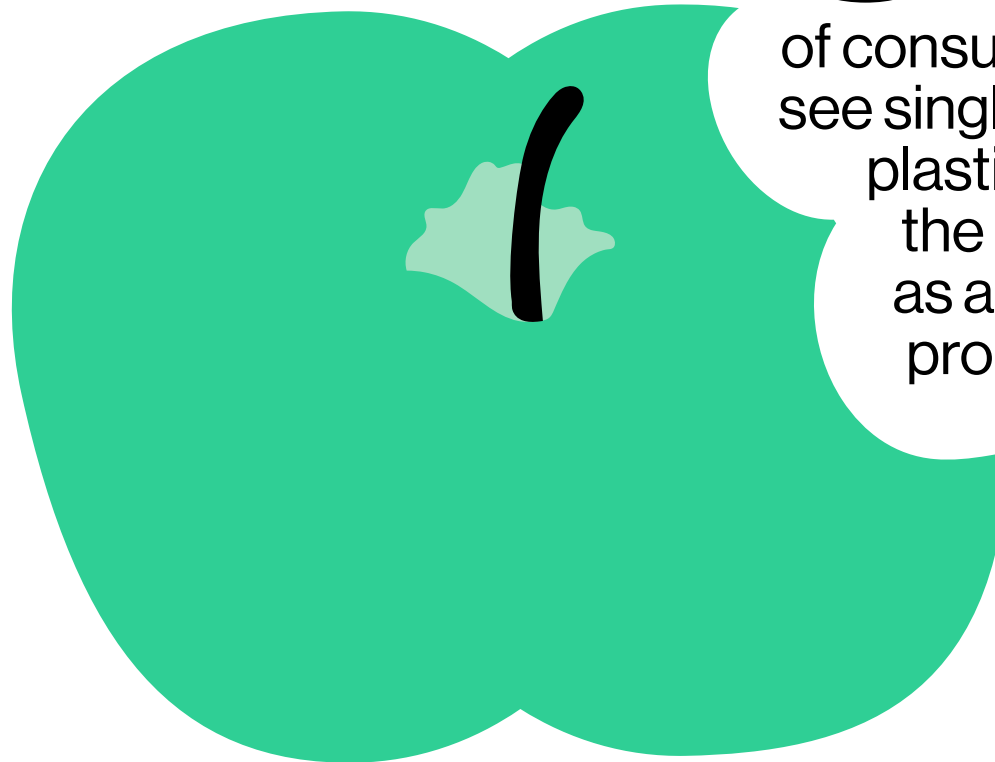
"We know that tackling the challenge of mounting plastic waste and its impact requires a holistic approach to best serve the needs of people, the business, and the planet."

Amanda Nusz, Vice President of Corporate Responsibility, Target



84%

of consumers see single-use plastic waste in the environment as a serious problem.



How can I waste less food?

Nearly one billion tons of food was wasted in 2019.¹

61% of which came from households, 26% from food service and 13% from retail. **This suggests that 17% of total global food production may be wasted.**

74% of consumers want to reduce their food waste more in the coming year, topping the list of sustainable food-related practices that consumers hope to do more of.

BBMG X GLOBESCAN

ENDS UP IN THE TRASH:

"My only guilt is food waste. Sometimes we buy or make more food than we really need and it ends up in the trash."

Gen X Male, California

WASTE FREE LIVING:

"Sustainable living means you are living in a way that is not wasteful."

Millennial Female, California

MY CHOICES MATTER:

"I don't want to be wasteful and make choices that lead to food waste or use material that is non biodegradable"

Millennial Female, California

¹ The 2021 UNEP Food Waste Index Report

Ikea recently launched "The ScrapsBook" and chef-led Instagram Live cooking classes on #scrapcooking Sundays to help shoppers cut down on food waste.



Danone North America launched Two Good "Good Save" yogurts in partnership with Full Harvest which works with farmers to identify over-produced or blemished produce that is destined for the compost pile.

Renewal Mill makes fiber and nutrient packed flours and cookie mixes from the byproduct of plant-based milk products.



And seeing the coming demand for food based solutions to climate change, **The Upcycled Food Association** recently launched their definition of upcycled food, and along with it a trust mark that brands can place on pack.

What's the full circle impact?

Consumers are excited by the prospect of rebalancing our food systems for regenerative benefits to all

Brands big and small are starting to talk about soil health, water conservation, carbon sequestration and upcycling as part of regenerative farming practices that were frankly pioneered by Indigenous communities centuries ago – and are now essential to rebalancing the natural ecosystems we depend

on. At the same time, consumers are more eager than ever for meaningful relationships with the farmers, producers and land that creates their food. Our conversations suggest that regenerative farming practices garner a sense of gratitude, connection and a sense of impact – beyond the last bite.

THOUGHTFUL FARMING:

"I think it's very thoughtful of farmers to try to improve climate change."

Millennial Female, Ohio

DESERVING OF BUSINESS:

"I think that those who follow good farming practices deserve good business and I would definitely consider them."

Millennial Female, Wisconsin



"Sustaining degraded resources as they are today is just not an appropriate strategy. Instead, we need to renew and restore and regenerate those planetary ecosystems that we depend on. And it'll take everyone from farmers to food companies to consumers to influence that regenerative approach."

Danielle Peltier Andrews, Director of Sustainability, Business Integration & Human Rights at General Mills

The Opportunity:

Unlock brand value and impact across the entire food journey

With consumers seeking a deeper relationship with the people and places behind the food they eat – and feeling increasing responsibility for food waste – forward-thinking brands are unlocking new stories, experiences, relationships and impacts at every stage of the food journey.

FIELD GUIDE →

General Mills is working to advance regenerative agriculture on 1 million acres of farmland by 2030 while educating consumers on the myriad benefits of the farming practice.



Regenerative Brands & the future of food

A radically better future of food offers more **relevance, accessibility, agency,** and **circularity.** And getting there requires Regenerative Brands.

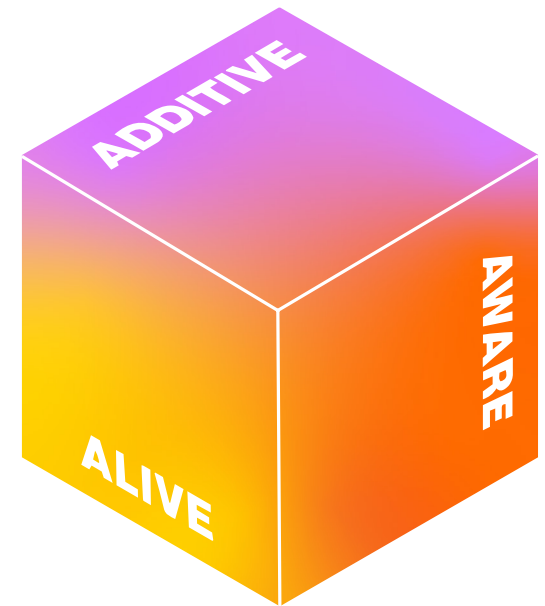
Regenerative Brands seek to create value for all beings for all time. They have higher aspirations to deliver more value, and they grow stronger by challenging the status quo and improving the system for all of us.

Regenerative Brands are designed for leadership by using what they're best at to fix problems beyond their own business, consumers and shareholders. They don't wait to take the lead on issues that can't wait.

There are three key qualities Regenerative Brands must cultivate to win in this new era. They need to be aware, additive and alive.

By designing Regenerative Food Brands, we can create a future worth savoring for all of us.

READ OUR PERSPECTIVE →



“Change is uncomfortable. Sometimes it feels lonely, but you’re going to find your kindred spirits. You are going to find people that want a radically different future just like you.”

Genevieve Martin, Executive Director at the Dave’s Killer Bread Foundation which promotes a “Second Chance Employment” model for companies to employ formerly incarcerated workers

“The conversation about sustainable cooking clearly needs to be louder; this policy is our contribution to that conversation.”

Epicurious on its decision to no longer publish new beef recipes on its site

“My hope is that folks who previously had their head in the sand about these issues of food insecurity and injustice have a felt the tiniest pinch themselves, and will be committed to partnering with all of us to make that necessary change.”

Leah Penniman, Co-Founder of Soul Fire Farm

METHODOLOGY

In June 2020, BBMG, in partnership with GlobeScan, conducted a survey with 27,000 people across the globe in 27 international markets (1,000 people in the US) to get an understanding of how people were fairing, how perspectives were shifting, and how behaviors were changing.

In April 2021, we went back into the field, but this time with a virtual focus group with 100 people in the US. We asked them about food systems, food stories, and new food innovations, as well as the brands that bring them to life. We asked all about how they feel about the foods they eat. How they discover the foods they want and need. How they make purchase decisions. How they seek to change and evolve their own eating habits. And how they see a future for food that they truly want. Some statements have been edited for length and clarity.

ABOUT BBMG

BBMG is a brand and social impact consultancy dedicated to working with leaders who won't wait on the things that can't wait. With a team of strategic creatives and creative strategists, culture experts and design thinkers, we build Regenerative Brands that are aware, additive and alive to transform the world we're in and create the future we want. BBMG is a Certified B Corporation with teams in Brooklyn and San Francisco. [BBMG.com](https://www.bbm.com)

ABOUT GLOBESCAN

GlobeScan is an insights and strategy consultancy, focused on helping clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose. Established in 1987, we have offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto. GlobeScan is a participant of the UN Global Compact and a Certified B Corporation. [GlobeScan.com](https://www.globescan.com)

CONTRIBUTORS

Raphael Bemporad
Jaime Cao
Chris Coulter
Liz Courtney
Francis Cowan
Christine Lamontagne
Rachel Lichte
Tove Malmqvist
Eric Whan
Crystal Yang

DESIGN

Ashley Jung
Hannah Kochmann
Jess Pitera



BBMG

GLOBESCAN