



# CLICKS & CRAVINGS

## The Impact of Social Technology on Food Culture

A HARTMAN GROUP AND PUBLICIS CONSULTANTS SYNDICATED STUDY



### EXECUTIVE SUMMARY

Social media changes food culture by influencing how consumers think about, talk about and experience food. With the clicks of our fingers, social media alters the entire lifecycle of a meal from planning, to buying, to cooking, to eating. As consumers use social media to discover, learn, and share information about food, they quickly become more active participants in food culture. They look to bloggers and the opinions of online others to expand their culinary horizons and make purchase decisions. Today's consumers increasingly prefer to learn about products based on the experiences of "people like me," rather than directly from brands. Social media allows them to do this with ease.

Social media engages consumers in a constant conversation that makes them among the most social on record. However, they must do much of their socializing alone, in front of a computer or in the palm of their hand. This leaves consumers craving contact with real people, even if virtually. For consumers to take notice, companies must use social media to communicate in ways that are authentic and personable. The good news is that when used correctly, social media is an excellent tool for companies to build personal and lasting relationships with their customers.

This report is the result of an in-depth qualitative and quantitative exploration of social technology's impact on food fielded October and November 2011 in the U.S. marketplace. In addition to providing insights into social media use, how information is acquired and shared online, the culture of food, brand relationships and lifestyles in the digital age, the report provides strategic recommendations on how companies can leverage social media to build meaningful and profitable relationships with consumers.

### RESEARCH HIGHLIGHTS

#### Social media changes the lifecycle of a meal from inception to consumption.

In the past, ethnicity and family traditions dictated the foods we prepared; we bought our groceries at a neighborhood store; we learned our recipes from "mom" or a cookbook; and we ate our meals together around a table. In contrast, today social media introduces us to new tastes, cuisines and possibilities; we source food via multiple channels including restaurants and online, often basing our decisions on the recommendations of friends; we learn recipes and techniques from TV shows, websites, blogs and online videos; and it is normal to eat with computers, phones, televisions and, increasingly, alone and often without a table.




#### Consumers fall along a continuum of least engaged to most engaged in social media.

The most engaged are social media "Doers" who are highly active in both food and social media and create content that inspires followers. "Doers" can be virtual brands themselves and are typically bloggers. Doers convert the "public" into their friends, fans, and followers. They are a very small segment of online adults.

Social media "Dreamers" are active social media users that connect people and curate and push food - and other - related content through social networks in ways that reflect their styles and sensibilities. They aspire to have larger followings and more influence than they currently do.

To be social on social media, companies need to know the actors, follow the netiquette, and step into the flow of conversations

### These are the people who own the conversations about food on social technology

 <p><b>"Spectator"</b> Social media is life as lived today Consumes content Socializes</p>	 <p><b>"Dreamer"</b> Active social media user Connects people Curates content</p>	 <p><b>"Doer"</b> Core in both food &amp; social media Creates content Inspires followers</p>
<p>Julie is like most people</p> <p><b>f</b> 384 friends Julie is a consumer of useful information, news, entertainment and good deals</p>	<p>Lisa is very social</p> <p><b>f</b> 1,100 friends Lisa curates and pushes content to her social network that reflects her style &amp; sensibilities</p>	<p>Natalie is a brand</p> <p><b>f</b> 7,000 friends Natalie is well positioned to be the voice of other brands, if she really likes them</p>



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### EXECUTIVE SUMMARY (continued)

Social media "Spectators" use social media as an extension of their actual social networks of friends, family, colleagues and schoolmates. They use social media for product reviews, recipes and good deals.

#### **Spectators dominate the social media landscape.**

Those who consume content far outnumber those who create it: 60% of online consumers say they read social networking sites weekly vs. 47% who say they contribute weekly. 32% of consumers say they read social networking sites daily vs. 18% who say they contribute daily.

#### **Social media enhances and feeds on the human desire to be social.**

Life with a visible media presence is becoming the new normal. Social media is a new way of talking, sharing ideas, and producing information, anywhere and anytime. For most, social media is a digital extension of their real network of friends and family.

#### **Social media changes our food behavior.**

Social media indulges our curiosities and provides an avenue for the safe exploration of new restaurants, cuisines and techniques. Consumers are increasingly visual and buy and learn about food online without touching, tasting or smelling. Consumers seek out websites with images that help them imagine the full experience of different foods. They also seek out the opinions of many before deciding what to buy.

#### **The vast majority of online adults use social media regularly.**

82% visit social network sites monthly, 75% use Facebook monthly and 49% say they learn about food via social networking. 40% of online adults say they learn about food via websites, apps or blogs. 9% of consumers say they downloaded a mobile food app in the past year while only 5% say they scanned a "Quick Response" (QR) Code in a store in the past month.

#### **Connected consumers turn to online resources to learn about food.**

When asked if they spend more time reading about food from print vs. online sources, 46% of online consumers say they spend more time engaged online vs. 31% who say they are equally engaged with online and print.

#### **Consumers still use traditional resources for inspiration about food but new technologies are catching up.**

While 31% say they are inspired by food shows they watch on TV, 25% are inspired by recipe websites or phone apps, and 17% are inspired by restaurant review websites or phone apps. Among Millennials, online media resources have overtaken print (such as magazines or cookbooks) and food TV shows as their most valued sources of inspiration when it comes to food.

#### **Consumers look to public communities for deals and recipes.**

47% say they've searched for online/digital coupons/specials, while 42% say they've searched online recipes. Related, consumers desire better and more highly specialized tools for shopping and meal planning. Moms and primary cooks and shoppers want easy-to-use apps that can make shopping, meal planning and saving money easier for them.

#### **Social media is becoming our mealtime companion.**

People are inherently social eaters, making social media and food a perfect pair. 29% of online consumers have used a social networking site while eating or drinking at home in the last month and 19% have done so away from home. 32% of consumers have either texted or used a social networking site or app in the last month while eating or drinking. This percentage jumps up to 47% among Millennials. While lunch is by far the most common locus of online-social eating, this activity otherwise happens evenly throughout the day. Consumers virtually break bread by sharing their food experiences, uploading photos and posting stories.



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### EXECUTIVE SUMMARY (continued)

#### **Leading up to and during meals, consumers use social media to communicate and look up recipes and discounts.**

During these occasions, 24% say they respond to conversations, 21% seek out recipes and 21% say they seek out discounts, coupons and deals.

#### **Social media influence starts with a person.**

People look to stylish people, not stylish brands for food and lifestyle advice. Today's consumers want to hear from people who eat and cook food more than they want to hear from the entities who sell. They follow people on Twitter, become friends on Facebook and read blogs of people with authentic voices, sincere posts, and meaningful content.

#### **Social media exponentially increases the speed at which information travels.**

People heed the advice of respected others in their social networks. Doers and Dreamers widely spread information about food, trends and good deals through public communities. Spectators then circulate this information within their intimate communities.

#### **In conclusion:**

Consumers primarily use social media to interact with friends and family. However, they are also discovering, learning, sharing and talking about food online. As such, they are willing to engage with food brands and companies in this space, but only if the interaction promises to enrich their lives in some tangible way, whether through useful information, money saving deals or entertainment.

While an exceptional product and a great deal will initially attract consumers to you, this is only the starting point of a truly meaningful social media relationship. To leverage the opportunities offered by this evolving platform, businesses must also craft a distinct online personality, enlist the support of other social media actors, be generous and humorous, reflect their customers' values and reveal their true personalities. With a few small changes in approach, social media is a tool companies can use to get outside their boxes and create more personable relationships with consumers.

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