



FOOD & BEVERAGES

MEANINGFUL  
BRANDS 2021





# MEANINGFUL BRANDS



**Twelve Year study** exploring how brands tangibly improve peoples' lives functionally, enhance their personal well-being, and contribute to wider society.



# The Meaningful Brands Study is unique within the industry

1

Dating from 2009,  
was the **FIRST**  
**GLOBAL**  
**FRAMEWORK** to  
connect brands with  
human well-being

2

Explores  
**PROPRIETARY**  
**METRIC** of brand  
strength for business  
and marketing  
planning

3

Helps us identify how  
and where to  
**MEANINGFULLY**  
**ENGAGE**  
with people through  
customer, brand and  
media experiences

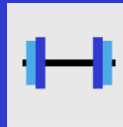


# A Tangible Definition of 'Meaningful'

Understanding what matters across 3 pillars and 14 dimensions

## PERSONAL BENEFITS

Messaging and behavior that connects on an individual basis and serves a specific personal need or want



PHYSICAL



ORGANISATIONAFINANCIAL



INTELLECTUAL SOCIAL



EMOTIONAL



NATURAL

## COLLECTIVE BENEFITS

Company initiatives, behaviors, and actions that respond to and connect at the social and cultural level



ECONOMY



EMPLOYER



ETHICS



GOOD LIVING



ENVIRONMENT



SOCIAL  
JUSTICE

## FUNCTIONAL BENEFITS

Rational benefits focused on product functionality , customer service, interactivity, and technology



FUNCTIONAL





# Brands are measured against specific attributes – *pertinent to their category* – within each pillar



## FUNCTIONAL

How the product or service delivers

- Banking app
- Best Camera
- Clear Info
- Comfortable clothes
- Compatibility
- Data privacy
- Delivers
- Designs
- Digital experience
- Easy journey
- Easy returns
- Easy Switch
- Exclusive exp.
- Fair Prices
- Fix cuts
- Handling
- Handset Change
- Helpful Staff
- In charge
- In store experience
- Inclusive Collection
- Innovative
- Interactions
- Leader
- Multisensory
- Price's consistency
- Proactive
- Quality brands
- Quality Prods
- Range
- Respect
- Safe & Responsible
- Safety features
- Scents
- Tariffs Range
- Technology-driven
- Tools & services
- Unique
- Upright



## PERSONAL

How brands improve peoples' lives



### PHYSICAL

- Healthy
- Attractive



### ORGANISATIONAL

- Life Easier
- Better Habits
- Save Time



### FINANCIAL

- Best interests
- Savings
- Wealth



### INTELLECTUAL

- Trendy
- Skills
- New Ideas



### SOCIAL

- Belonging
- Sharing
- Connecting
- Closer



### EMOTIONAL

- Me Happy
- Makes me content
- Self-Esteem
- Peace of Mind
- Show-off/Pride
- Self expression
- Privileged
- Relaxed



### NATURAL

- Env. Enabler
- Sense of Purpose



## COLLECTIVE

A brands role in society



### ECONOMY

- Local Suppliers
- Development
- Benefits the Economy



### SOCIAL JUSTICE

- Migrants
- LGBT+ rights
- Women's rights
- Anti-racism
- Social Leader
- Improve access
- Diversity



### ETHICS

- Transparent
- Causes
- Data protection
- Ethical



### GOOD LIVING

- Healthy lives
- Education
- Culture access
- Food security
- Poverty



### ENVIRONMENT

- Respects Animals
- Sust. consumption
- Climate change
- Respects Nature
- Sust. Energy
- Sust. Innovations
- Clean supply chain
- Food waste
- Sust. Brands



### EMPLOYER

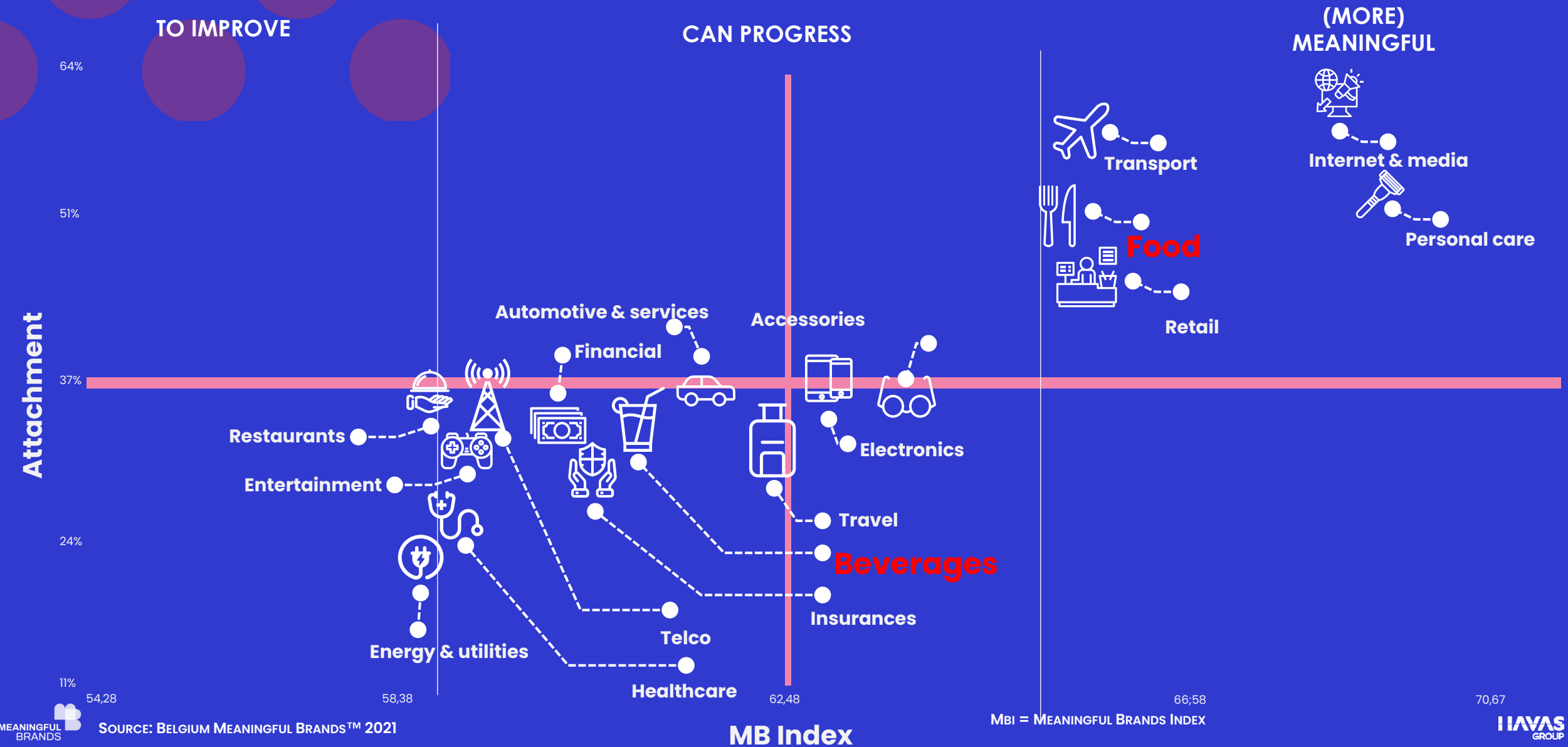
- Good employer
- Jobs
- Invests

In orange: Attributes specific to a category



# MBi & Attachment per category

food sector ranks among the most meaningful and has a strong attachment. Beverages are lagging behind in the "peloton".





# Meaningful brands are measured through a **Meaningful Brand Index**

## Brand KPI's (50%)

- ✓ Overall impression
  - ✓ Advocacy
- ✓ Purchase / Repurchase intents

## Performance on MB Attributes (50%)

- ✓ Functional
  - ✓ Personal
- ✓ Collective benefits



# Belgian most Meaningful Food & Beverages Brands 2021



Belgium

1		71,7
2		70,1
3		70,0
4		68,9
5		66,5
6		66,2
7		66,1
8		65,9
9		65,1
10		64,8
11		64,6
12		64,6
13		64,5
14		64,4
15		64,3
16		64
17		63,7
18		63,7
19		63
20		62,9
21		62,5
22		62,4
23		62,2
24		62,1
25		62
26		61,9
27		61,2
28		59,2
29		59,1
30		58,2



# North most Meaningful food & beverages Brands 2021



1		72,8
2		71,8
3		71,6
4		70,8
5		70,8
6		69,4
7		68,2
8		68
9		67
10		67
11		66,7
12		66,6
13		66,3
14		66,2
15		65,9
16		65,8
17		65,7
18		65,6
19		65,3
20		65,3
21		64,9
22		64,8
23		64,6
24		64,4
25		63,9
26		63,7
27		63,2
28		60,7
29		60,3
30		60,2



# South most Meaningful food & beverages Brands 2021



1		70,1	2		68,9	3		68,1	4		66,6	5		66,2	6		66	7		65,7	8		64	9		63,8	10		63,2
11		62,9	12		62,8	13		62,4	14		61,6	15		61,4	16		60,9	17		60,6	18		60,3	19		59,9	20		59,6
21		59,4	22		58,9	23		58,8	24		58,4	25		57,9	26		57,5	27		57,2	28		57	29		55,9	30		55,1





# What make the Food industry meaningful today?





Unsurprisingly, consumers expect a quality product that delivers what it says, safe at a fair price. Happiness, sharing win on the personal side.



## FUNCTIONAL

Deliver a good product / service

45%

- 119 Quality Prods
- 110 Delivers
- 109 Leader
- 109 Safe & Responsible
- 108 Fair Prices



## PERSONAL

Improve peoples' lives

29%

- 123 Me Happy/Content
- 117 Sharing
- 115 Peace of Mind
- 113 Life Easier
- 113 Self expression



## COLLECTIVE

Play a role in society & environment

26%

- 126 Food security
- 122 Clean supply chain
- 116 Local Suppliers
- 115 Benefits the Economy
- 115 Transparent



**The food sector performs very well where consumers expect them most: the functional pillar. Personal benefits are a point to work on.**

DRIVERS' IMPORTANCE

**45%**

**FUNCTIONAL**



**29%**

**PERSONAL**



**26%**

**COLLECTIVE**



BRANDS' PERFORMANCE 1-7/7



Weak

Med

Good



# Functional is even slightly higher in the North. Dutch speakers distinguish themselves by a higher score on leadership, show-off, good employer and respect animals



## FUNCTIONAL

Deliver a good  
product / service

# 46%

- 120** ➔ Quality Prods
- 114** ➔ Leader
- 110** ➔ Fair prices
- 110** ➔ Multisensory
- 110** ➔ Safe & Responsible



## PERSONAL

Improve peoples'  
lives

# 28%

- 136** ➔ Me Happy
- 122** ➔ Show-off/Pride
- 120** ➔ Peace of Mind
- 119** ➔ Sharing
- 119** ➔ Content



## COLLECTIVE

Play a role in society  
& environment

# 26%

- 121** ➔ Food security
- 121** ➔ Clean supply chain
- 116** ➔ Good employer
- 115** ➔ Jobs
- 115** ➔ Respect animals



# Same top 1 than in the North: quality, content and food security French speakers distinguish themselves by a higher score on delivering, In-store X, Life easier, local & transparency



## FUNCTIONAL

Deliver a good product / service

43%

- 120 Quality Prods
- 113 Delivers
- 109 Safe & responsible
- 107 In-store experience
- 106 Range



## PERSONAL

Improve peoples' lives

31%

- 124 Content
- 116 Sharing
- 115 Me Happy
- 112 Life Easier
- 111 Peace of Mind



## COLLECTIVE

Play a role in society & environment

26%

- 129 Food security
- 121 Clean supply chain
- 120 Local suppliers
- 117 Benefits the Economy
- 115 Transparent



# They like brands that are of quality, make them happy and have a clean supply

## Ethics is not an empty word for them



### FUNCTIONAL

Deliver a good product / service

44%

- 116 Quality Prods
- 108 Leader
- 106 Multisensory
- 106 Safe & Responsible
- 106 Delivers



### PERSONAL

Improve peoples' lives

29%

- 132 Me happy
- 130 Content
- 121 Show-off/Pride
- 118 Sharing
- 118 Peace of Mind



### COLLECTIVE

Play a role in society & environment

26%

- 121 Clean supply chain
- 115 Food security
- 115 Transparent
- 113 Respect animals
- 109 Ethical



# They pay first attention on quality, happiness and food security. Fair prices fair stand out in their top attributes



## FUNCTIONAL

Deliver a good product / service

46%

- 124 Quality Prods
- 116 Safe & responsible
- 112 Leader
- 111 Delivers
- 111 Fair prices



## PERSONAL

Improve peoples' lives

28%

- 125 Me Happy
- 122 Content
- 119 Life Easier
- 116 Self expression
- 115 Sharing



## COLLECTIVE

Play a role in society & environment

26%

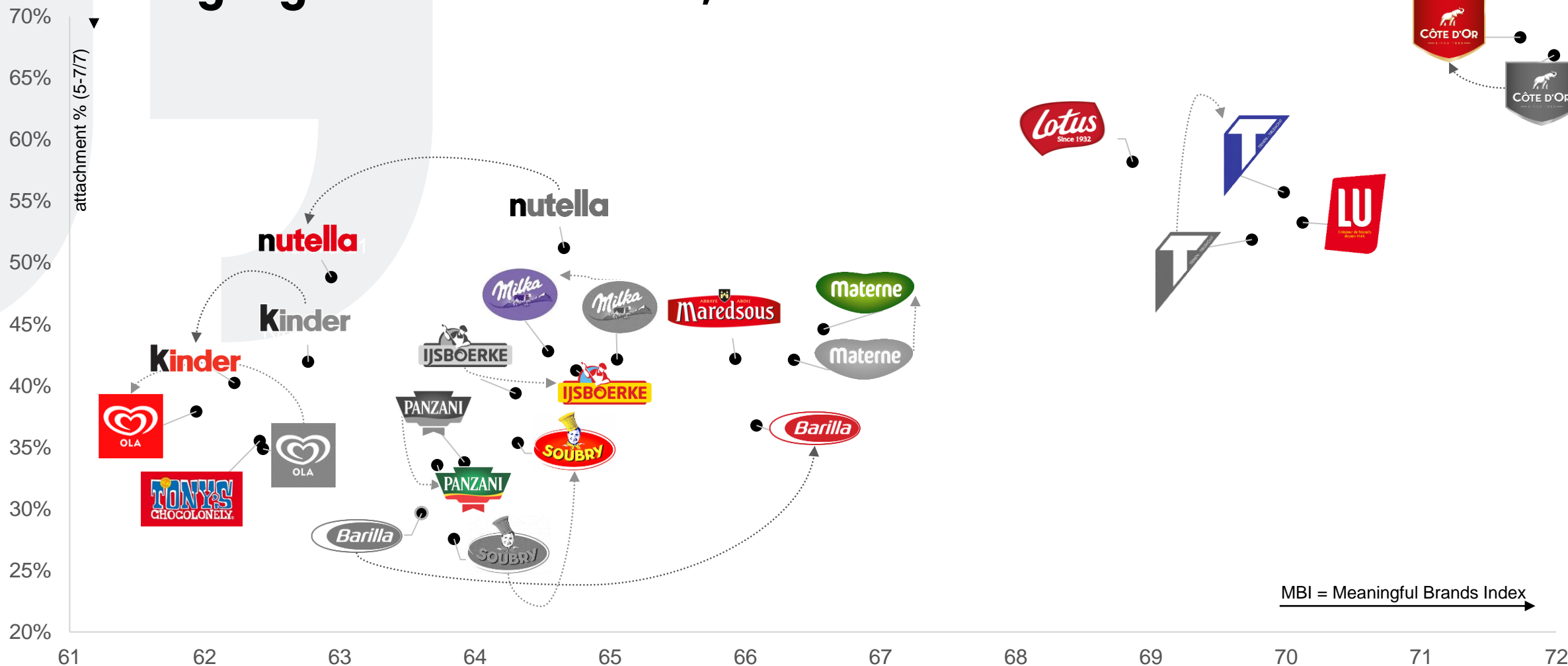
- 135 Food security
- 130 Benefits the economy
- 130 Clean supply chain
- 130 Local suppliers
- 120 Transparent



# Côte d'Or is the leader on attachement & MBI

## Best progression for Soubry, Tiensesuiker, Ijsboerke & Materne

### Big regression for Nutella, bad evolution for OLA & Kinder



% attachment: % of respondents who would care if the brand disappeared, 5-7 on a scale from 1 to 7 (%)  
 Meaningful Brand Index: 50% Brand Performance on MB attributes + 50% Brand Equity

SOURCE: BELGIUM MEANINGFUL BRANDS™ 2021



# Top Belgian food brands by target



Food

Côte d'Or dominates food sector. LU, Lotus and Tiensesuiker compete for the top 3.

Tony's Chocolate & Kinder in the top 10 for Gen Z.

## National

1	2	3 ↓ -1	4	5 ↓ -2	6 ↑ +3	7	8 ↓ -2	9 ↓ -5	10 ↓ -2
71,7 -0,2	70,1	70,0 +0,2	68,9	66,5 +0,2	66,1 +2,5	65,9	64,7 +0,4	64,5 -0,5	64,3 +0,5

## North

1	2	3	4 ↓ -2	5 ↓ -2	6 ↓ -2	7 ↓ -1	8	9	10
72,8 +0,4	71,8	70,8	70,8 +0,9	69,4 +0,4	68,2 +0,4	66,6 +0,7	66,5 -0,3	66,2 +3,3	65,8 +0,7

## South

1	2	3	4 ↓ -1	5	6 ↓ -1	7	8 ↓ -4	9 ↓ -2	10 ↓ -2
70,1 -1	68,9 -0,7	68,1	66,6 +0,9	66,2	66 +1,6	65,6	63,2 -1,7	62,4 +0,3	61,3 +0,1

## GenZ

1	2	3	4 ↓ -2	5 ↑ +7	6 ↓ -2	7 ↓ -2	8 ↓ -5	9	10 ↓ -1
71,2	70,4	69,5	68,7 +1,7	67,8 +5,5	67,5 +1,3	67,3 +1,4	67,1 +0,3	66,6	65,2 +2,4

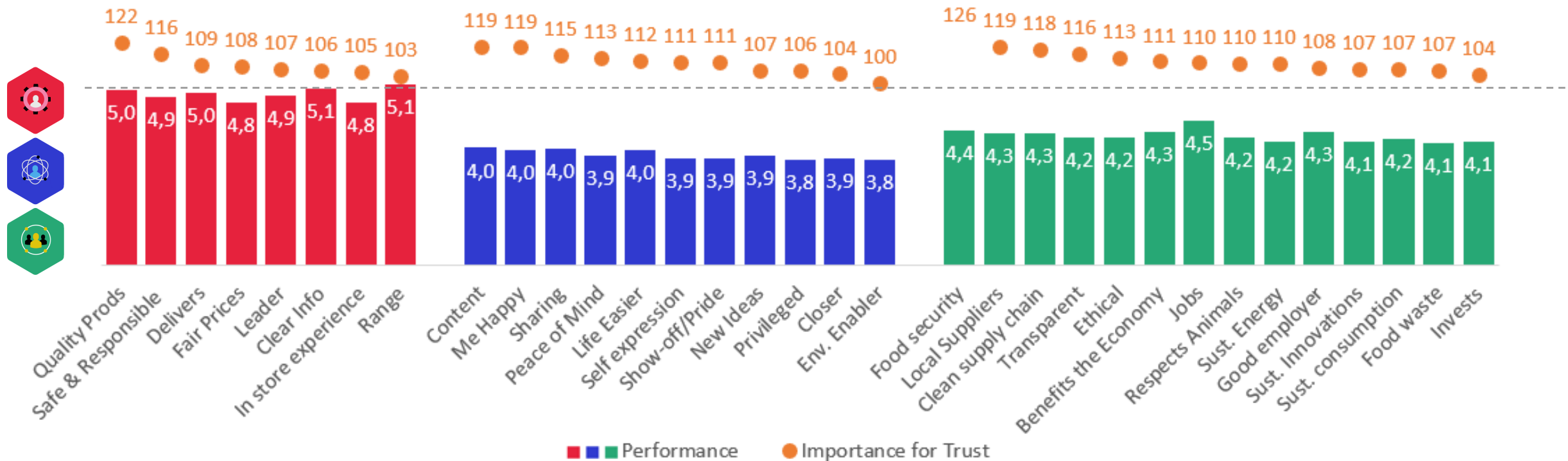
## Boomer

1	2	3	4	5 ↓ -2	6	7 ↑ +1	8 ↓ -4	9 ↓ -2	10 ↓ -4
71,2 -1,5	70,8	69,4	68,1	66,5 -3,1	66,4	63,1 +2,9	62,9 -1,4	62,6 +1,4	61,6 +0,2



**The functional aspect tends to meet consumers' expectations.  
For the personal & collective aspect, there is a gap between consumer expectations and brand performance. Quality prods, Peace of Mind & Transparent are working point**

Attributes contributing to willingness to Trust in the food sector in 2021





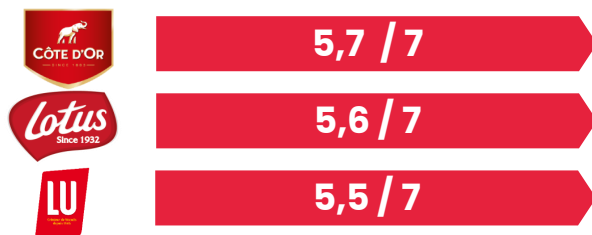
# Champion brands by attributes: North



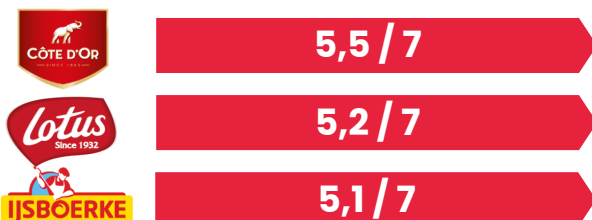
## Safe & Responsible



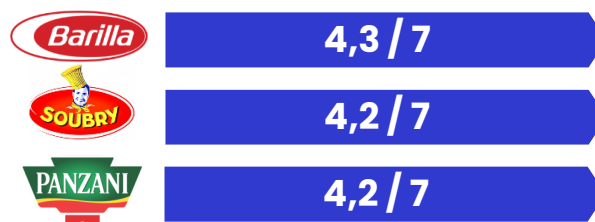
## Quality Prods



## Multisensory



## Environment Enabler



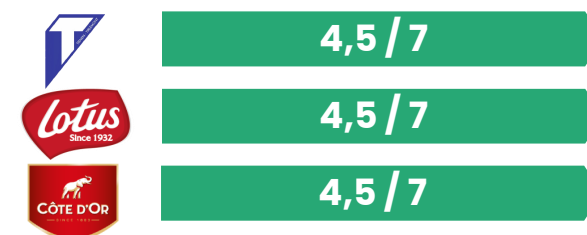
## Healthy



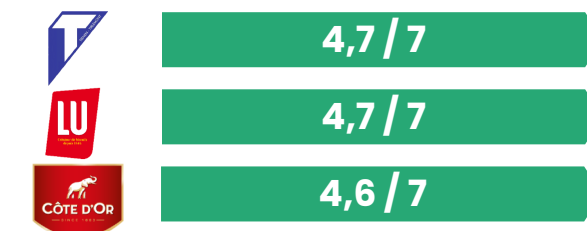
## Better Habits



## Causes



## Clean supply chain



## Food waste





# Champion brands by attributes: South



## Fair Prices



5,1 / 7



5 / 7



4,9 / 7

## Quality Prods



5,5 / 7



5,3 / 7



5,3 / 7

## Range



5,7 / 7



5,7 / 7



5,4 / 7



## Sharing



4,2 / 7



4,1 / 7



4 / 7

## Life easier



4,2 / 7



4,2 / 7



4,1 / 7

## Self expression



3,9 / 7



3,9 / 7



3,8 / 7



## Local suppliers



4,6 / 7



4,5 / 7



4,4 / 7

## Clean supply chain



4,5 / 7



4,4 / 7



4,4 / 7

## Transparent



4,3 / 7



4,2 / 7



4,1 / 7



# Champion brands by attributes: Gen Z

Gen Z  
Food



## Unique



5,2 / 7

**nutella**

5,1 / 7

**Kinder**

5,1 / 7

## Quality Prods



5,4 / 7



5,3 / 7



5,2 / 7

## Range



5,6 / 7



5,5 / 7



5,5 / 7



## Show-off



4,4 / 7



4,3 / 7



4,2 / 7

## Belonging



4,2 / 7



4,2 / 7



4,2 / 7

## Me Happy



4,5 / 7

**nutella**

4,5 / 7



4,4 / 7



## Local suppliers



4,5 / 7



4,5 / 7



4,4 / 7

## Clean supply chain



4,5 / 7



4,4 / 7



4,4 / 7

## Transparent



4,6 / 7



4,6 / 7



4,6 / 7

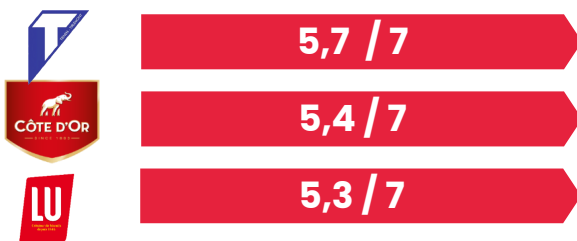


# Champion brands by attributes: Boomers

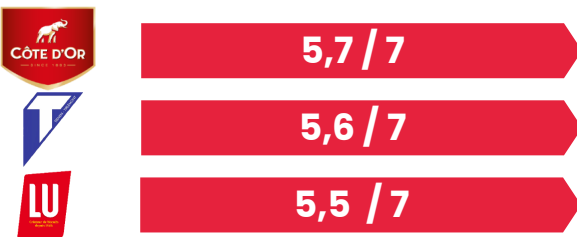
Boomers   
Food



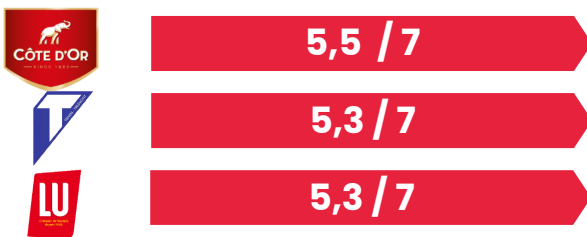
## Leader



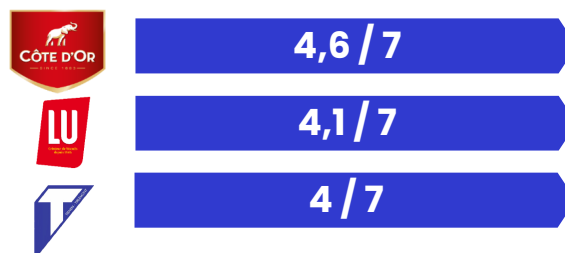
## Quality Prods



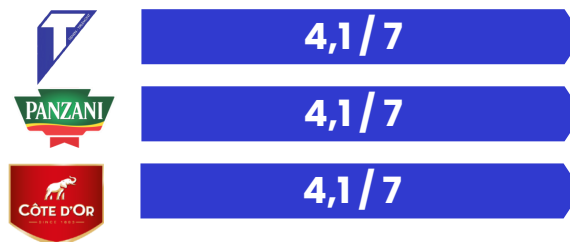
## Delivers



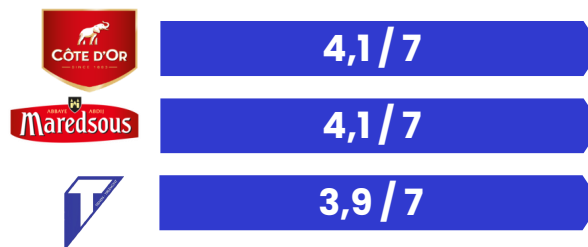
## Me Happy



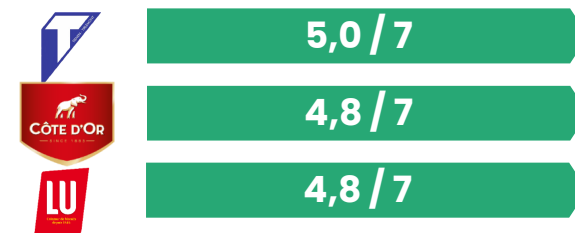
## Life easier



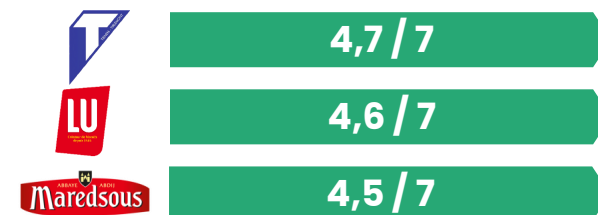
## Self expression



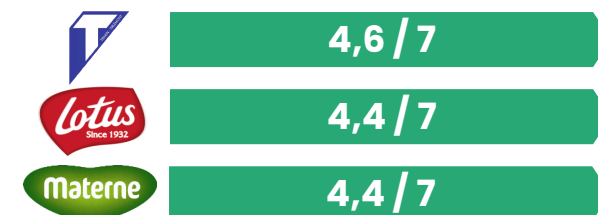
## Benefits the economy



## Clean supply chain



## Transparent





What make the **Beverage**  
industry **meaningful**  
**today?**





# The personal pillar has great importance for the beverage sector. Self expression, show-off & sharing are the top attributes



## FUNCTIONAL

Deliver a good product / service

42%

- 114 Quality Prods
- 107 Leader
- 107 In store experience
- 106 Fair Prices
- 105 Delivers



## PERSONAL

Improve peoples' lives

32%

- 114 Self expression
- 113 Content
- 112 Show off/Pride
- 111 Sharing
- 111 Me happy



## COLLECTIVE

Play a role in society & environment

26%

- 112 Sust. consumption
- 111 Food security
- 109 Sust. Energy
- 109 Benefits the Economy
- 108 Sust. Innovations



# A big dissonance between the importance given to the personal pillar and the market performance on this pillar



DRIVERS' IMPORTANCE

42%

FUNCTIONAL



32%

PERSONAL



27%

COLLECTIVE



BRANDS' PERFORMANCE 1-7/7



4,53



3,60



4,05

Weak

Med

Good

HAVAS  
GROUP

BRAND PERFORMANCE SCALE (1-7)

SOURCE: BELGIUM MEANINGFUL BRANDS™ 2021



# In the North, Quality prods, Leader & Multisensory are the most important attributes for the functional aspect



## FUNCTIONAL

Deliver a good product / service

42%

- 117 Quality Prods
- 111 Leader
- 110 Multisensory
- 109 Fair Prices
- 106 In store experience



## PERSONAL

Improve peoples' lives

32%

- 119 Content
- 117 Show-off/Pride
- 117 Self expression
- 113 Me happy
- 111 Sharing



## COLLECTIVE

Play a role in society & environment

26%

- 112 Food security
- 110 Sust. consumption
- 108 Benefits the Economy
- 108 Sust. Innovations
- 108 Healthy lives



# In the South, In store experience & exclusive experience stand out. Self expression & Sharing are the most important personal attributes



## FUNCTIONAL

Deliver a good product / service

41%

- 111 Quality Prods
- 107 In store experience
- 107 Delivers
- 105 Exclusive exp
- 103 Fair Prices



## PERSONAL

Improve peoples' lives

32%

- 112 Self expression
- 111 Sharing
- 110 Me Happy
- 109 Content
- 108 Show-off/Pride



## COLLECTIVE

Play a role in society & environment

27%

- 115 Sust. Energy
- 114 Sust. consumption
- 112 Transparent
- 110 Food security
- 110 Sust. Innovations



# no big differences for Gen Z. Leader, Quality Prods, Fair prices & Show off

Gen Z  
Food



## FUNCTIONAL

Deliver a good product / service

41%

- 110 Leader
- 109 Quality Prods
- 105 Fair Prices
- 104 In store experience
- 104 Multisensory



## PERSONAL

Improve peoples' lives

32%

- 120 Show-off/Pride
- 113 Me Happy
- 113 Life Easier
- 112 Content
- 111 Self expression



## COLLECTIVE

Play a role in society & environment

27%

- 113 Sust. consumption
- 111 Sust. Innovations
- 108 Transparent
- 107 Ethical
- 106 Benefits the Economy



# Quality Prods is primordial for boomers



## FUNCTIONAL

Deliver a good  
product / service

42%

- 120 Quality Prods
- 111 In store experience
- 108 Delivers
- 107 Faire prices
- 104 Multisensory



## PERSONAL

Improve peoples'  
lives

32%

- 113 Content
- 113 Self expression
- 111 Me Happy
- 110 Sharing
- 109 Peace of Mind



## COLLECTIVE

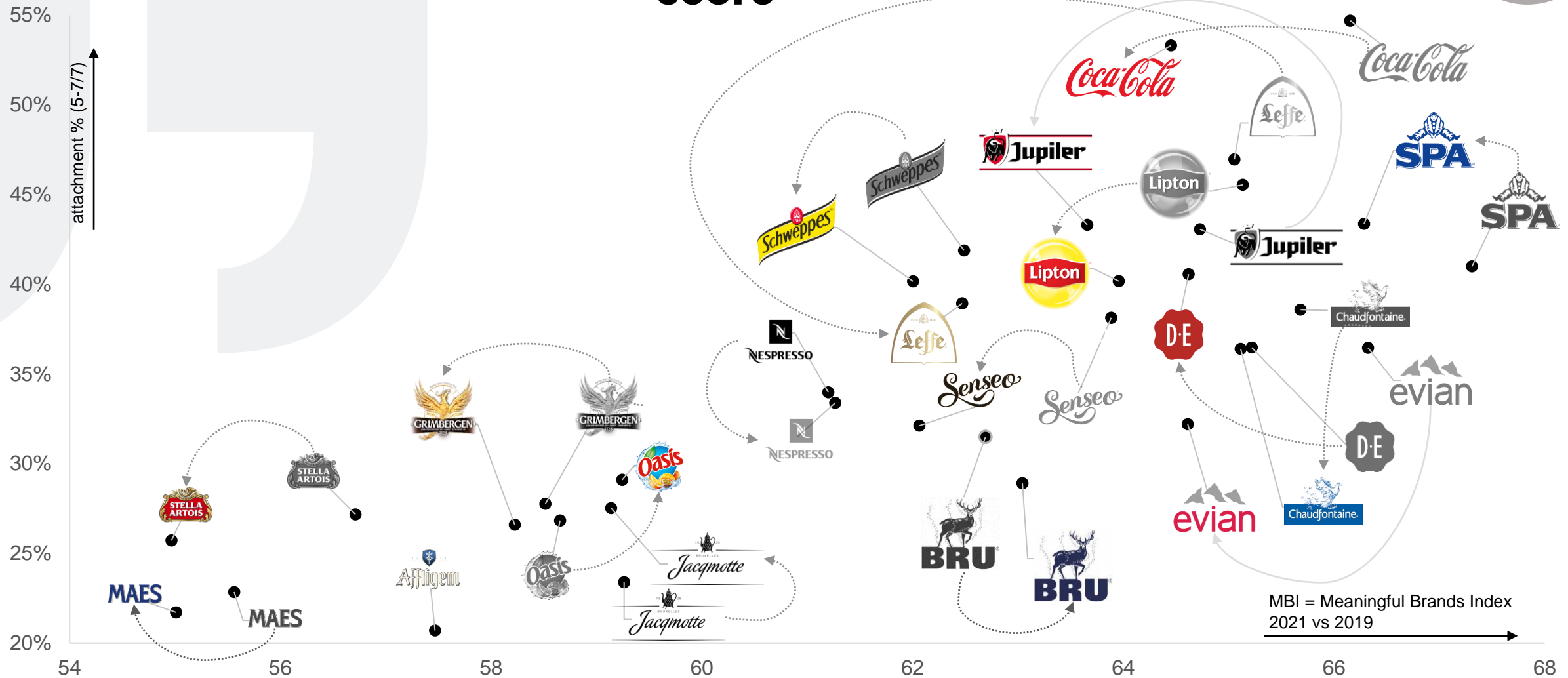
Play a role in society  
& environment

26%

- 119 Sust. Energy
- 114 Sust. consumption
- 113 Healthy lives
- 113 Food security
- 113 Benefits the Economy



**In general, the beverages sector as a whole has decreased in meaningfulness. BRU is the only beverage that has increased its score**



% attachment: % of respondents who would care if the brand disappeared, 5-7 on a scale from 1 to 7 (%)  
Meaningful Brand Index: 50% Brand Performance on MB attributes + 50% Brand Equity

SOURCE: BELGIUM MEANINGFUL BRANDS™ 2021



# Top Belgian Beverages brands by target

Spa, Evian & Douwe Egberts dominate the top 3 of the different segments



## National

1  66,2 -1	2 ↑ +2  65,1 -0,6	3 ↑ +2  64,6 -0,6	4 ↓ -2  64,6 -1,7	5 ↓ -2  64,4 -1,7	6  63,9 -1,2	7 ↑ +1  63,6 -1,1	8 ↑ +2  63 +0,4	9 ↓ -2  62,4 -2,6	10 ↓ -1  62 -1,8
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## North

1  71,5 +2,2	2 ↑ +3  67,9 +1,6	3 ↑ +3  67 +1,1	4 ↑ +3  66,9 +1,2	5 ↓ -3  66,3 -0,7	6 ↓ -2  65,9 -0,7	7 ↑ +1  65,3 -0,1	8 ↑ +1  64,9 +0,6	9 ↑ +2  64,8 +2,1	10 ↑ +2  64,3 +2,4
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## South

1  63,9 -4,8	2  63,8 -4,1	3 ↑ +3  62,8 -0,4	4 ↓ -1  62,8 -2,7	5 ↑ +2  61,5 -1,6	6 ↑ +2  60,8 -1,7	7 ↑ +2  60,2 -2,1	8 ↓ -4  59,8 -4,2	9 ↓ -4  59,5 -4,3	10 ↑ +3  58,3 -1,4
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## GenZ

1  71,2 -0,1	2 ↑ +1  70,4 -0,4	3 ↑ +1  69,5 -0,7	4 ↓ -2  68,7 -3,9	5 ↑ +1  67,8 -2	6 ↑ +7  67,5 +1,7	7 ↑ +3  67,3 +1,4	8 ↑ +6  67,1 +2,1	9 ↑ +7  66,6 +2,7	10 ↓ -5  65,2 -4,5
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## Boomer

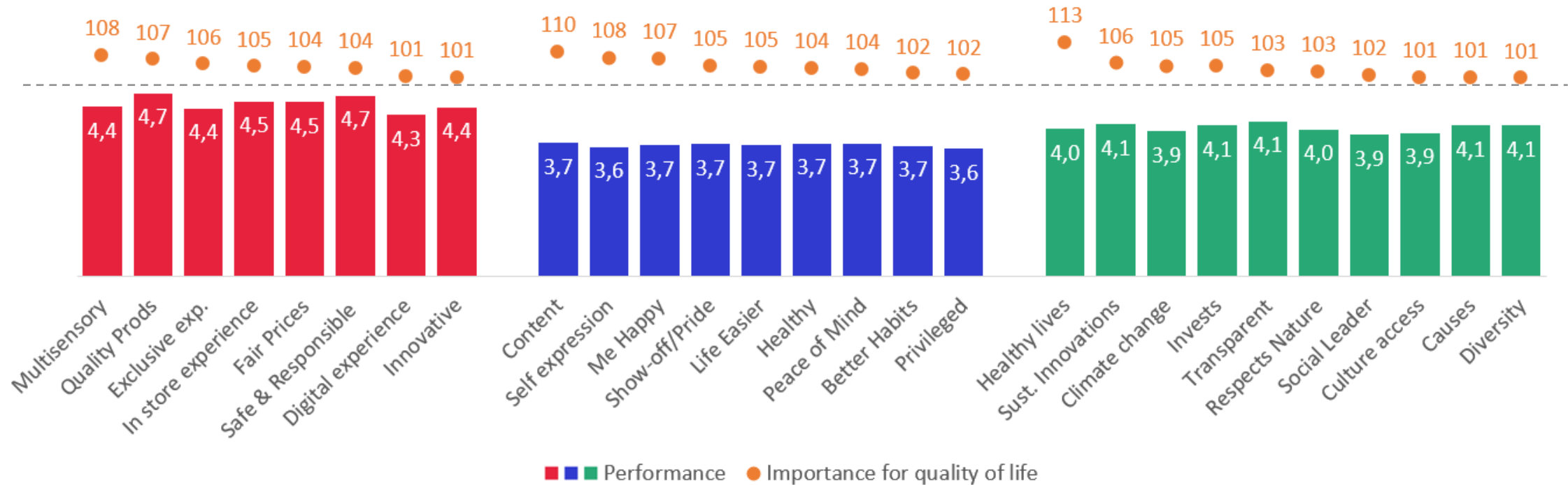
1  71,2 -0,6	2 ↑ +1  70,8 -1,4	3 ↑ +9  69,4 +3,2	4 ↑ +3  68,1 +1	5 ↓ -3  66,5 -3,7	6 ↓ -1  66,4 -0,6	7 ↓ -3  63,1 -3,3	8 ↓ -2  62,9 -2,1	9 ↓ -1  62,6 -1,7	10 ↑ +3  61,6 -0,5
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**The functional aspect tends to meet consumers' expectations, except multisensory.**

**For the personal & collective aspect, there is a gap between consumer expectations and brand performance. They want to be even more happy and think the brand has to be healthy**

**Attributes contributing to quality of life in the beverage sector in 2021**

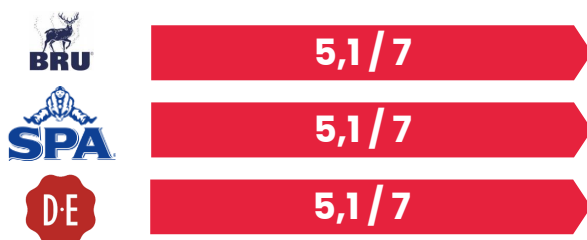




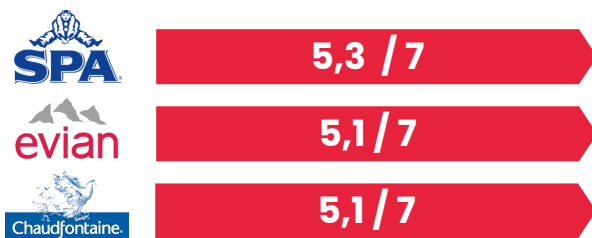
# Champion brands by attributes: North



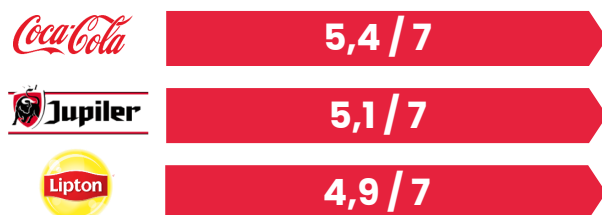
## Delivers



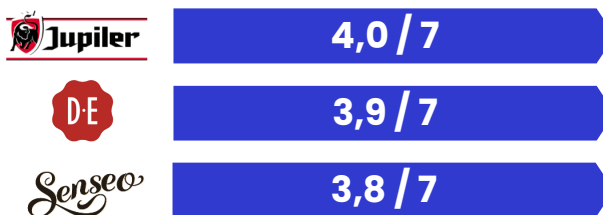
## Clear Info



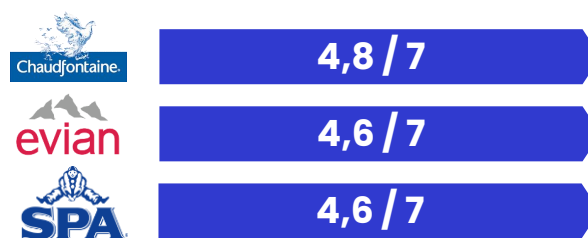
## Leader



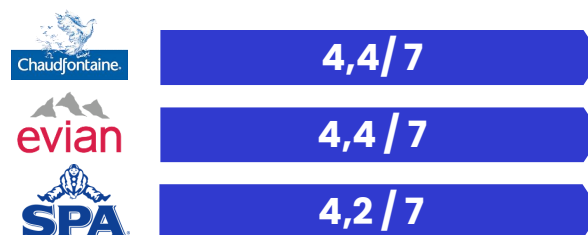
## Sharing



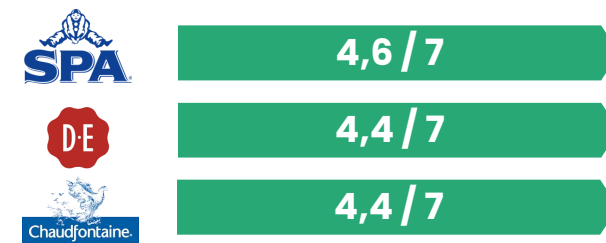
## Healthy



## Better Habits



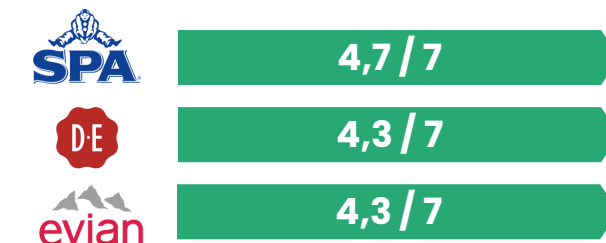
## Jobs



## Benefits the Economy



## Clean supply chain





# Champion brands by attributes: South



## Delivers



5,1 / 7



5,1 / 7



5,1 / 7

## Clear Info



5,3 / 7



5,1 / 7



5,1 / 7

## Range



5,2 / 7



5,1 / 7



5,0 / 7



## Sharing



4, / 7



3,9 / 7



3,8 / 7

## Healthy



4,8 / 7



4,6 / 7



4,6 / 7

## Better Habits



4,4 / 7



4,4 / 7



4,2 / 7



## Jobs



4,6 / 7



4,4 / 7



4,4 / 7

## Benefits the Economy



4,6 / 7



4,3 / 7



4,3 / 7

## Clean supply chain



4,7 / 7



4,3 / 7



4,3 / 7



# Champion brands by attributes: Gen Z

Gen Z  
Food



## Leader



## Range



## Clear Info



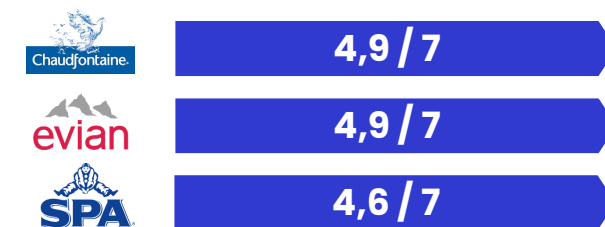
## Sharing



## Better habits



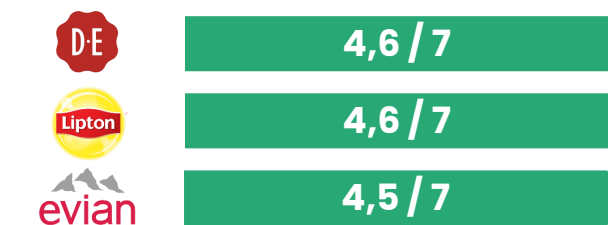
## Healthy



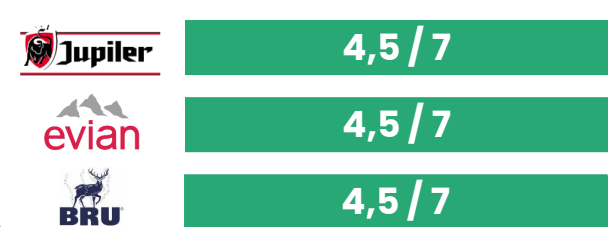
## Jobs



## Good employer



## Benefits the Economy





# Champion brands by attributes: Boomers

Boomers   
Food



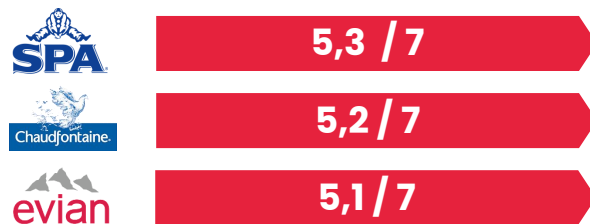
## Leader



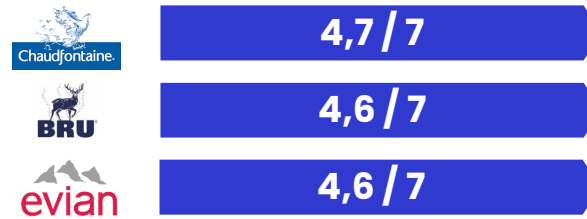
## Range



## Clear info



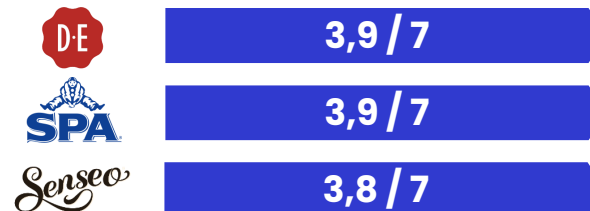
## Healthy



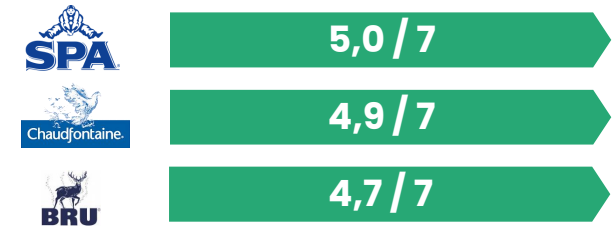
## Better Habits



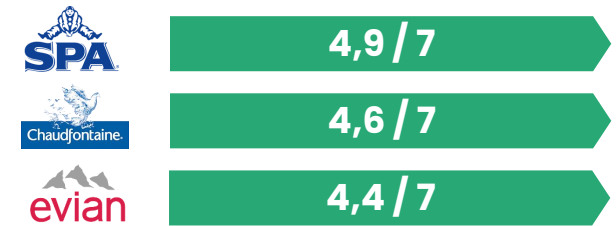
## Sharing



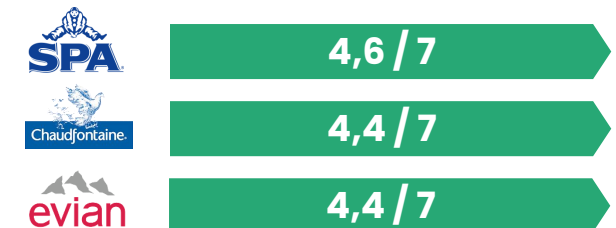
## Local supplier



## Sust. Energy



## Healthy lives





THANK YOU  
THANK YOU  
THANK YOU  
THANK YOU  
THANK YOU  
THANK YOU  
THANK YOU  
THANK YOU

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