

The Influence Codes

CHAPTER 03: Food

Contents.

Part 1 - How the Australian food context has changed.

Part 2 - What's driven the change?

Part 3 - How to influence what Australians eat.

The source of our insights:

12+ months of exploration.

5 projects investigating influence.

3 delivered, 2 underway.

3 specialist organisations.

37 global experts.

20,000 consumer conversations.

THE
growth
DISTILLERY

Ogilvy

KANTAR

A quick recap of the Influence Codes.

The main ingredients of Influence

What is influence?

Influence is the intentional (and sometimes unintentional) effort to affect the attitudes and behaviour of an individual or group, through the provision of stimuli or conditioning.

There are 4 key components to influence;

Information: Holds power when it is scarce or valuable, guiding decisions with unique insights or outcomes.

Authority: Vested in trusted individuals or institutions, derives its influence from being perceived as reliable sources of information and guidance.

Community: Reflects the shared behaviours and attitudes of those within our physical or ideological spaces.

Affinity: Shaped by those we admire or aspire to be like, it influences through personal connection and aspiration.

Exec summary

The most potent influence connects context, establishes authenticity and caters for the audience's capability.

We're a nation obsessed with food.

Australians make countless food decisions daily, influenced by our rich cultural diversity and an abundance of choices. In this dynamic environment, influence plays a critical role in helping us navigate these decisions.

Sadly, current much food marketing and communications are failing to deliver to this need.

As our choices have exploded, the importance of authority has diminished.

Historically, sources of Authority in food were powerful curators and gatekeepers. Their role was to inform and instruct the public about what they defined an authentic food experience should be. However, the importance of Authority has waned, and in its place, Affinity—built on trust, relatability, and emotional connection—now reigns supreme.

We seek to use food to drive authentic connections

We no longer require status to determine who is an authentic source or voice on food. Through digital and new types of media, we are able to cut out the middle-man and directly navigate towards a source that we feel (and can often clearly see) is providing an authentic example of the food experience we wish to create.

There is a shift to inspiration from instruction

For older Australians, sources of influence in food tend to provide more instruction... helping them in their search for perfection in their cooking skills.

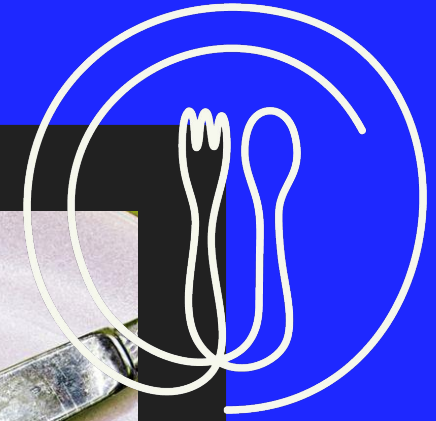
However, younger Australians are less concerned with maximising capability, and more interested in sources that inspire their own culinary creativity.

Affinity is the key to this: in the context of food this means...

Once again, building Affinity is the key to developing influence in food. This involves being relatable and understanding the contexts your audiences want to create, establishing your authenticity to inspire and inform them, and providing content that helps them achieve their distinct goals.

PART 01:

How the Australian food context has changed.





We have grown into the most *successful multicultural* country in the world.

Approximately 3 in 10 Australians were born overseas. This is more than double the foreign born population of the US or UK, and when you think about the controversy around immigration from all around the world just think about the civility of the national discourse we have on immigration.


55% of Australians' agree that 'the traditional Australian values regarding cooking, eating and food are changing rapidly'.

And, food has become our *national obsession*.

The growth of multicultural Australia has been coupled with our country being seen as a culinary backwater, to now being one of the best places in the world to drink and dine.

Australian style cafes have made a splash in London and New York, and our fresh and quality produce means that we take the best international cuisines and perfect them over here.

Today, almost 8 in 10 of us consider ourselves either 'foodie' (27%) or someone who 'enjoys food' (51%)'.



We're exposed to a *plethora of potential sources of influence* to choose from, on what, when and how to eat.

There has been an explosion in the number of potential sources that we can now use to inspire and inform ourselves as cooks.

From the continued presence of our leading food media brands, through to the rise of social media food influencers consumers have an sea of information sources to choose to listen to.

45% of Australians agree that "the sheer number of choices available for cooking and eating can be overwhelming."

As our *food context has changed*, the way we think about food has changed... and the *rules of influencing* what & how Australians eat have fundamentally changed.



THE CORE IDEA.

Australians now *trust people like them, or that they aspire to be like*, not traditional authorities, to guide their food choices.

In other words - there's been an *evolution from authority to affinity* in food influence.

WHY THIS MATTERS.

Most marketing is *worsening the engagement problem.*

In Australia, where more than half (52%) of marketers focus on conversion and performance marketing over brand building, compared to 34% globally. Based on current trends we expect to see this focus grow.

Kantar's LINK database reveals that in the last three years, engagement with communications has dropped by 50%, and the ability of brands to create demand has fallen by 40%.

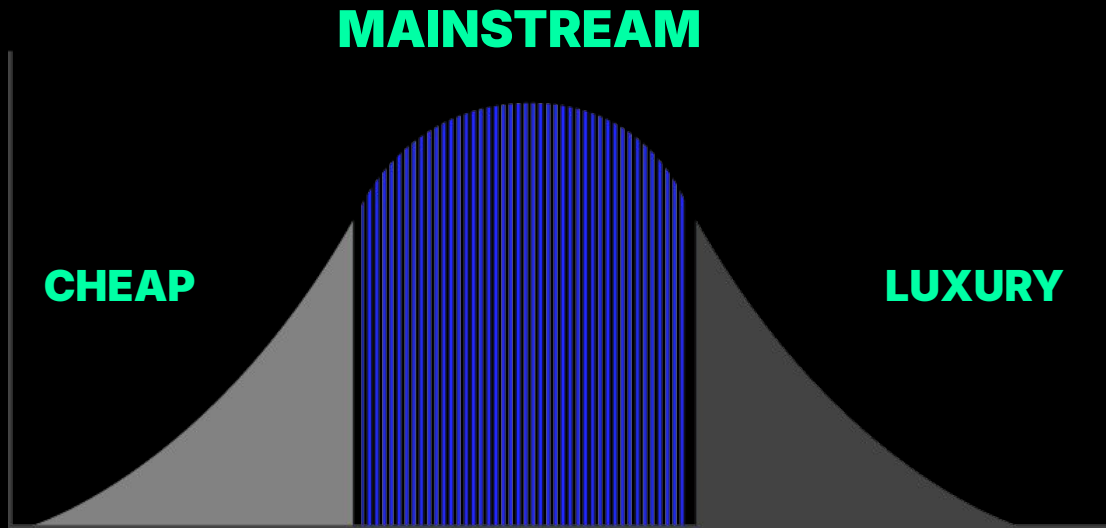
Over the same period, fewer than 50% of ads are perceived as saying something new, leading to a 51% decline in meaningfully differentiated brands in Australia over the last decade.

The outcome:

- System 1, in their calculation of the cost of 'dull' advertising, found 50% of comms were found to be less effective than a 30 second video of a cow eating grass.
- Not only are we spending USD189b on ineffective, undifferentiated advertising, but we're spending 7.3x more than we need to for return on marketing investment.



Brand differentiation is harder than ever, with a *mid priced 'dead zone'*.



The receding value-equation.



The emerging value-equation.

Once the safe, default choice, mainstream brands are now out of step with the flexibility mindset that favours either 'the best' or 'the best priced.'

This shift risks leaving *brands marooned in the murky middle*, struggling to compete on and beyond supermarket shelves and QSR menus.

PART 02:

What's Driving the Change?



From
*evangelising
'content'...*

*...to
embracing
the 'context'.*

SHIFT 01

A shift from the 'content' of products, *to the 'context' which they are to be consumed in.*

Most marketers recognise the importance of distinctiveness in communications, yet many fail to provide the necessary context for their products. In food marketing, the trend of using 'top-down' isolated food photography has fallen short.

While it may display the beauty of the dish, it lacks the critical element of context, leaving consumers uncertain about how it fits into their lives



Although in the minority, it should be noted that some highly successful food and beverage brands directly focus upon the context of their consumption in order to deliver distinctive and relevant communications.

KFC for example, has focused on delivering a clear context of 'free-spirited moments of release'.

Unlike many beer brands in Australia who compete during the summer months, Guinness is instead establishing itself as the drink for colder occasions.

From
'the right way'

...to
'my way'

SHIFT 02

Influence in food used to be driven by 'traditional top down authorities' who provided information on the 'right way' to cook...

...now it is driven by inspiration that fits 'my way' to cook.

Historically, the most powerful influence lever in food was Authority.

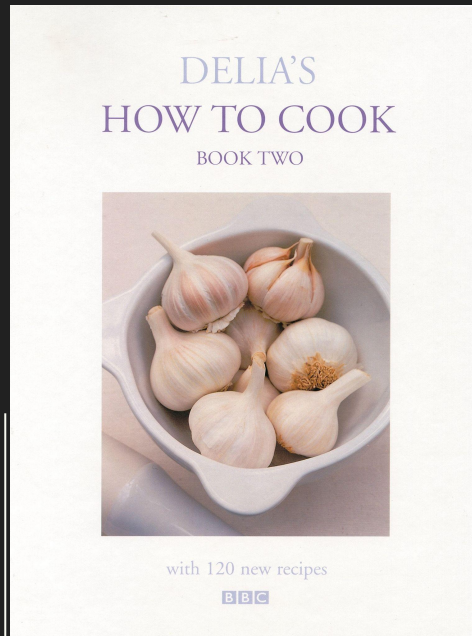
Food, and cooking in particular was, for the most part, about sustenance.

Recipes and cooking techniques were something we had to learn, and signature dishes were something we perfected over time.

Meals had to be eaten. And if they weren't, there was always the parental threat of the leftovers being reserved for breakfast.

Authorities provided the information on the 'right' things to do in the kitchen. Information, delivered as instruction through recipes, defined 'how to cook' and what a 'good' outcome of cooking should be.

TV shows, magazines and books on Household Management were the authorities that instructed us on the food to buy and the recipes to follow.



From *food perfection...*

...to food that more perfectly fits my life.

SHIFT 03

For all of our new found interest and excitement in food, some old rules remain steadfastly true.

Being a nation of Masterchef viewers doesn't mean we want to become Masterchefs ourselves.



Luke's most viral "easy dinner"

Whilst our appetite and aspirations in food have expanded dramatically, the reality of the lives in which we buy, prepare and eat food haven't.

The majority of us simply don't have more time (much less the inclination) to create culinary masterpieces on a Tuesday night.

For all the surge in popularity of air-fryers, we're still using our stove tops, ovens and microwaves far more frequently.

Whilst many of us (55%)* want to improve our cooking skills, and experiment with new recipes (29%)* these aspirations remain anchored in the practical realities of our time-poor, high-pressured lives.

Indeed, with the cost-of-living crisis impacting many the lives of swathes of Australians, the practical pressures and considerations of time, effort, energy, money and waste have only grown in parallel with our gastronomic tastes.

New flavours and international culinary experiences may be key 'nice to have' drivers when considering new products at the supermarket shelf, but 'cost' and 'ease of preparation' are the two strongest and non-negotiable considerations influencing our ultimate decisions**.

Additionally, the current cost of living crisis means that food waste is definitely on our minds, with 79% of us saying we're careful to avoid waste when cooking and planning meals**.

The result is that Australian food consumers expect more, without having to do more.

We expect the same if not greater level of convenience, and we're seeking to avoid compromising on meal outcomes we want.

*News Corp Food Influence Survey, 2024

** Kantar Global Monitor, 2024

We're now more
'flexible' in how we
seek to achieve the
perfect meal.

Building on the idea that perfection is no longer the goal, consumers are now more flexible in their approach to meals, prioritising convenience, variety, and personal preferences over traditional notions of a perfect dish.

This flexibility allows for experimentation with ingredients, cooking methods, and meal delivery options, as consumers feel empowered to adapt recipes to their needs.

Implication: Brands that provide customisable options or quick, easy solutions for different lifestyles will resonate more deeply with this mindset of flexibility and experimentation.



This has led to *category diffusion*, and a much broader set of 'competitors'.

PART 03

How to influence what Australians eat.



Because we make so many decisions regarding food, *when the rules of influence change... we see it happen in food first!*

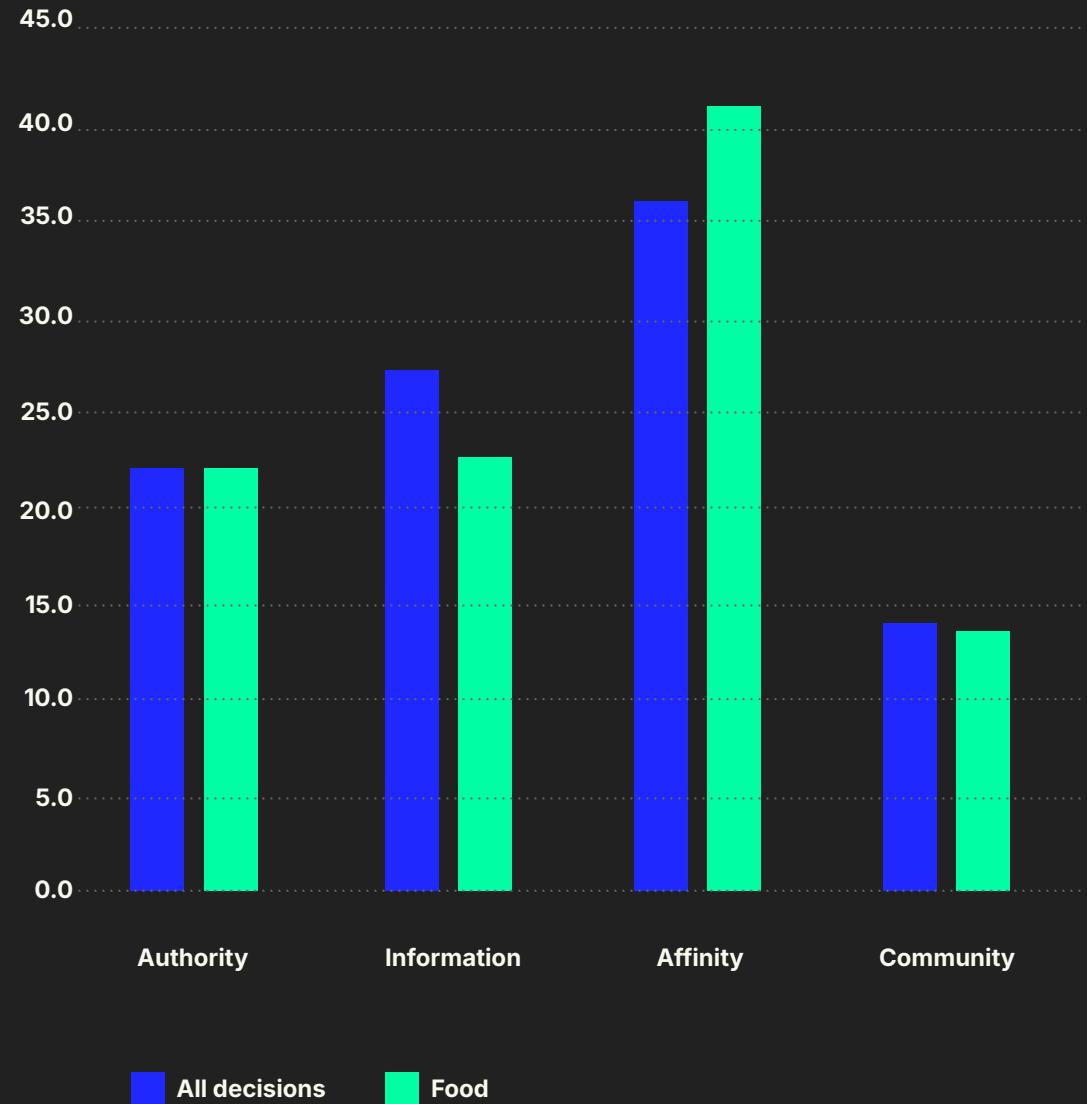
Influence in food typically revolves around two outcomes: creating a food experience that suits the right occasion, and reducing the barriers—such as time, effort, cost, and eating habits—that prevent this from happening.

Given that the experiences we seek in food are highly personal and situation-specific, voices that do not inspire first are losing the right to instruct.

Successful influence increasingly requires focusing on achieving the desired outcomes of food decisions, rather than prescribing the recipe to get there.

For this reason, affinity is even more critical in food than in general decision-making; it accounts for 41% of all influence in food decisions. Since food decisions are made multiple times a day, the types of information that expedite decision-making are specific. Consequently, the overall importance of information is relatively lower in food decisions (23%) than in general decision-making.

This makes the overall picture clear: for brands seeking to be influential, demonstrating the context for food consumption and showing how their brand and products fit and benefit within that context is far more powerful than providing detailed information about the product's content.





We're lost in information, and seeking sources to help us navigate.

With so many sources of information competing for our attention, knowing who to choose to listen to is tricky...

...meaning we are less confident in the decisions we are required to make.

Rather than waiting for influence to come to us, we are actively seeking it out instead.

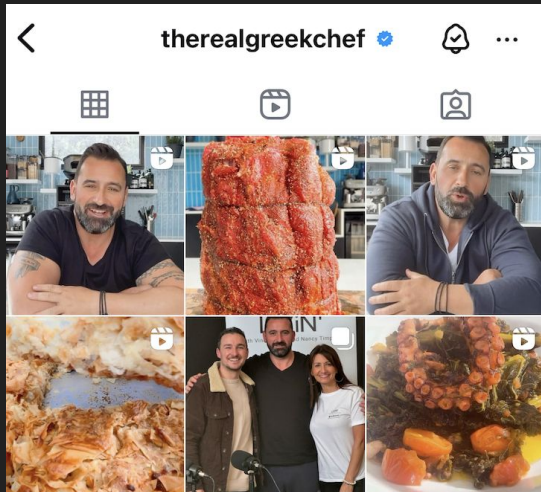


Influence *'must-do's'*

AUDIENCE

The four 'must-do's' to *optimise your influence*

BE AUTHENTIC AND RELIABLE.



Being seen as "the real deal"—authenticity and reliability are the most powerful forces in food influence, with over three times more impact than the average influence factor

Authenticity makes you relevant to occasions, while reliability ensures you won't disappoint once you're there.

SIGNAL RELATABILITY.



Being relatable—demonstrating that you've heard and understood the consumer's context—is the second most powerful influence factor.

The real power of relatability lies in its ability to act as a gateway to building proximity, trust, and stronger affinity with consumers.

SIMPLIFY INFORMATION.



While many forms of influence hold less weight in food marketing, simplifying information into clear options remains highly persuasive.

The key is to limit the amount of thinking required and facilitate faster, clearer decisions.

BE EXPERTS BY EXPERIENCE.



Authority is generally less significant in influencing food decisions.

However, demonstrating a deep level of experience, especially when conveyed in relatable situations that mirror consumers' own food experiences, is highly persuasive.

How to build authenticity and reliability in food...

Authenticity and Reliability are nearly three times more powerful than any other influence factor. This strength comes from aligning with the two trends shaping food culture in consumers' lives: the desire for inspiration and the need to avoid compromises in time, effort, and money.

Authenticity demonstrates your relevance and resonance in food occasions. This doesn't mean you need to be "authentic" in an artisanal sense. **Vegemite**, for example, has done this well by positioning itself as an Australian icon.

Being authentic means you come to mind quickly in relevant moments, making you more likely to be chosen.

Demonstrate reliability by offering solutions that reduce the time, effort, or investment required without compromising on quality.

...Be a source that *people can rely on*

WHAT TO DO

- **Seek to share.** Brands that build affinity are open, honest and generous.
- **Be clear and consistent.** Own the occasions where you have most relevance
- **Be positive, not passive.** Show how you enhance occasions by reducing effort, spend, or time.

WHAT NOT TO DO

- **Don't over-explain.** Intuition and emotion are faster, more effective means of influencing than detailed explanations.
- Equally don't **seek to be centre-stage.** Context is where you'll build true influence.



How to build relatability in food

As consumers become increasingly confident in making autonomous food choices, Relatability becomes a key influence factor. Demonstrating that you understand your consumers and their context is the gateway for brands to become a part of consumer food occasions.

Old El Paso, for instance, has done this effectively by consistently presenting itself as the solution to dinner-time challenges.

Showing where you fit into consumers' lives is essential for establishing and building a lasting role in their ongoing food purchase repertoires. By doing so, brands can unlock and leverage the full power of affinity influence.



...Signal relatability to unlock the full power of affinity

WHAT TO DO

- **Listen to your consumers.** Understand the circumstances and context where you fit into their lives and leverage this in communication.
- **Make it personal.** Engage consumers as peers and build your place within their behaviours.
- **Be grounded.** Have clear sense of place and belonging, and deep links to the cultures in which you operate.

WHAT NOT TO DO

- **Don't operate at distance.** Seek to be as proximate as possible, whilst not overstepping.
- **Don't seek to be the star.** Admiration creates distance. Simply being likable is the best way to close it.

How to convey information in food

With the volume of food-related information available today, information overload is a key consideration in influencing consumers. In fact, 45% of Australians agree that "the sheer number of choices available for cooking and eating can be overwhelming."

Therefore, the more practical, hands-on, and tangible the information is, the more influential it becomes. The best approach is to be as open, direct, and simple as possible. Eliminating ambiguity and reducing mental effort are essential.

While product trials have some merit, the most influential strategy is to synthesise information into comparative options. Burger King has consistently done this by comparing its Whopper size to that of a Big Mac. This approach limits the time and effort required for decision-making, reducing System 2 cognition to intuitive, clear, and concise System 1 decisions.

Now more than ever, what you don't say is often more important than what you do.



WE KNOW, WE KNOW. PICK ON SOMEONE OUR OWN SIZE.

With over 25% more beef than the Big Mac!® WHOPPER® is once again America's Favorite Burger.



*Based on post-cooked patty weight. BIG MAC is a registered trademark of McDonald's Corporation. TM & © 2007 Burger King Brands, Inc. All rights reserved.

...use information to make choices simple and quick.
System 1 trumps System 2.

WHAT TO DO

- **Be direct.** Create clear options to reduce choice complexity and potential indecision.
- **Be open.** Privileged or rare information, far from being desired, is a disincentive.
- **Engage with experiences.** Again, operating at distance doesn't work. Trials trump demonstrations in the world of influence.

WHAT NOT TO DO

- **Demand mental effort.** In-depth or detail information is, for the most part, a turn off.
- **Make it complicated.** Independent reviews and benchmarks (however credible) prolong decisions that consumers seek to accelerate.

How to demonstrate authority in food

If your credentials, title, or position are the focus of your communications, you're likely not making yourself more influential.

Food is highly social and emotive. Connecting with people peer-to-peer is a far more powerful way to establish authority than adopting a traditional, formal posture of authority.

Titles, positions, and credentials are less effective in influencing, especially in food, compared to more general decision-making contexts. Highlighting these is more likely to increase the cynicism and distrust that 47% of Australians already feel towards big food brands and institutions.



Red wine, ice cream and canned fruit salad.

...Build your authority by *sharing your real-world experience.*

WHAT TO DO

- **Be Personal.** Create common-ground with consumers by sharing your experiences.
- **Be Practical.** Show and share your experience in a practical, hands-on way.
- **Be Direct.** Address consumers directly and personally, avoid talking en masse.

WHAT NOT TO DO

- **Don't Big-Note.** Credentials, awards, titles, and accreditations carry less weight in food influencing and risk provoking cynicism. Avoid making these the focus or being the centrepiece yourself.

For younger generations, *information and authority play stronger roles*. For older generations, *affinity alone is more powerful*.

Whilst Affinity remains a key factor across all generations, the formula for influence changes across different generations.

Authority and Information are sought more by younger Australians, particularly Gen Z.

This, likely, reflects their relative inexperience in food & cooking, and with it an increase appetite to explore and discover new flavours, techniques and styles of cuisine.

Reflective of this, 41% of Gen Z self-identify as a 'foodie'.

By contrast, for older generations authority and information decline in importance as affinity becomes more singularly influential.

This likely reflects greater levels of experience and confidence in their own cooking ability, and more established repertoires in the eating behaviours.

		AUTHENTICITY/ RELIABILITY	RELATABILITY	SIMPLE INFORMATION	EXPERIENTIAL EXPERTISE
	GEN Z 18-27	8.9 ix. 68	5.0 ix. 81	6.3 ix. 108	6.9 ix. 119
	MILLENNIALS 27-43	11.4 ix. 88	5.0 ix. 95	6.3 ix. 108	6.4 ix. 109
	GEN X 44-59	13.4 ix. 103	6.3 ix. 103	5.6 ix. 96	5.4 ix. 93
	BOOMERS 60+	15.0 ix. 115	6.6 ix. 107	5.5 ix. 95	5.5 ix. 95

A close-up photograph of a man with a beard, wearing a dark sweater, eating a sandwich. The sandwich is filled with white cream, meat, and vegetables. The background is blurred, showing other people in a social setting.

Wrapping it all up - you have to
inspire first, to earn your right to inform.

TO INSPIRE

You need to understand *the context.*

Earn the attention you want by providing value to the context audiences are seeking to create.

TO ENGAGE

You need to showcase *the desired outcome.*

Display what a successful outcome can look like.

THE INFORM & INFLUENCE

You need *to simplify the process & leverage your credentials to deliver it.*

Make it simple and easy for the audience to deliver the outcome in an authentic fashion.

The Influence Codes

CHAPTER 03: Food