



Food & Beverage Mfg. Industry

## Industry Perspective on the Challenges of Today

Fieldwork: April 16 – 20, 2020

Published: April 22, 2020



Discussions surrounding the reopening of the US economy have begun as we release the results of Wave 3 - ***Industry Perspective on the Challenges of Today***. Some controversy exists surrounding the gradual reopening of the economy, with great consideration being given to both the health of people and the economic health of our country. Although Wave 3 survey respondents indicate just under half of their current and/or planned business has been delayed or cancelled, the small business stimulus offered through the CARES Act appears to be having a positive effect for some.

Industry professionals surveyed have changed the way they are communicating with employees and customers, and report they are using this down time to position themselves and their businesses for success when things return to “normal”. What the new “normal” will be remains to be seen, however industry professionals are hopeful that their business activities will be back on track in the next seven months or so. As with prior waves, the information contained within this report represents moments in time. It provides the collective voice of industry decision makers, influencers, and contributors, and offers a unique understanding of where businesses are today. We will continue to update these results over time. Please feel free to share this content with others that may find the information meaningful or beneficial in some way.

I hope the data provided will be useful to you as you plan for the future and comforting as you navigate the ever changing business environment.

Sincerely,

**Beth Surowiec** Executive Director – Clear Seas Research / BNP MEDIA

[surowiecb@clearseasresearch.com](mailto:surowiecb@clearseasresearch.com)

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The coronavirus outbreak is truly a human tragedy with very real business and economic consequences. Business leaders globally are in uncharted waters as together we face the challenges surrounding the recent pandemic and resulting economic impact. Insight into how others are reacting, overcoming current challenges, and planning for tomorrow can provide us with not only comfort, but a shared community of learning and preparation.

The bringing together of industry professionals to share their experiences with the Coronavirus / COVID-19 as related to business activities including planning, staffing, investing, and marketing in an online survey, provides a collective industry perspective. This is a perspective that will continue to change over time; a perspective that can help inform the business decisions we make today as well as our future plans. This is a perspective that can unite the industry and encourage collaboration; a perspective that will be monitored and reported as events continue to evolve.

Clear Seas Research (a BNP Media Company) is uniquely positioned to engage with industry professionals in niche market sectors, which are all impacted in different ways by this pandemic. The unrivaled industry access available to Clear Seas Research through myCLEARopinion Panel and BNP Media subscriber databases provides extensive reach to business thought leaders, decision makers, decision influencers, skilled trade professionals, and general employees of companies of all sizes.

Our research expertise and audience access enables us to collect, analyze, and report this information for the industries we serve. We are taking this opportunity to give back to those that have helped us be successful for more than 14 years. We hope you find the information contained within this report to be thought provoking, relevant, and insightful. We hope it brings you comfort and helps strengthen your resolve as you continue to face ongoing challenges in the days to come. We hope it provides you with insights that will help you continue to succeed in business.

This research addresses change over time specific to:

- Industry concern related to the pandemic and the impact on business and the economy
- The impact of the pandemic on industries targeted for this research
- Measures being taken to keep employees, customers, and others health/safe
- How industry professionals are managing current business activities and planning for the future

Individual market reports are available for the following industries: *AEC, Mechanical Systems, Food & Beverage Manufacturing, Manufacturing, Security/Critical Industries, and Gaming & Hospitality.*

## Study Details

**Target Audience:** Members of myCLEARopinion Panel and subscribers to BNP Media publications.

**Sample Source:** BNP Media publication subscribers and members of myCLEARopinion Panel

**Survey Method:** Online

**Average Survey Length:** 11 minutes, 11 seconds

**Incentive:** Access to the results

**Fieldwork Dates:** April 16 – 20, 2020

## Data Tabulation and Presentation

All closed-ended numerical data is tabulated using SPSS (a statistical software package), while open-ended questions are either summarized, coded, or included as written by respondents.

The data is presented in graphic and tabular format detailing the number of respondents who answered each question.

Sample sizes may vary throughout the report due to skip logic, data cleaning, or missing responses.

Some totals may not equal 100% due to rounding. Net values (e.g. top 2 box) may not match individual percentages due to rounding.

Use caution when interpreting results with sample sizes less than 30 respondents.

Fieldwork Summary	Total
Number Contacted	22,307
Usable Completes <sup>1</sup>	102

<sup>1</sup>Total number of completed surveys after data cleaning

# Food & Beverage Mfg. Industry

Industry Perspective on the Challenges of Today

Findings: April 16 – 20, 2020

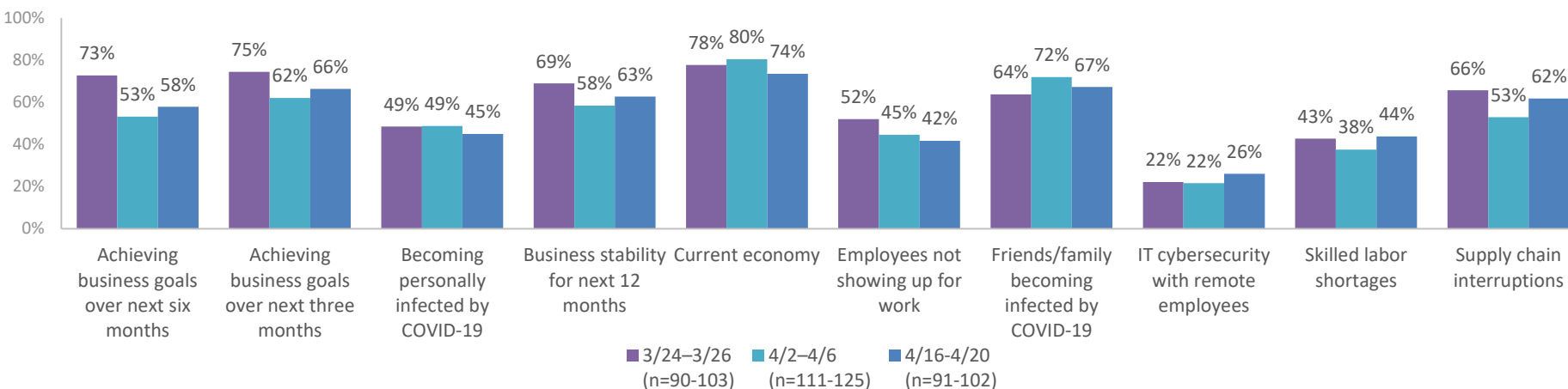


Research conducted by Clear Seas Research in partnership with...



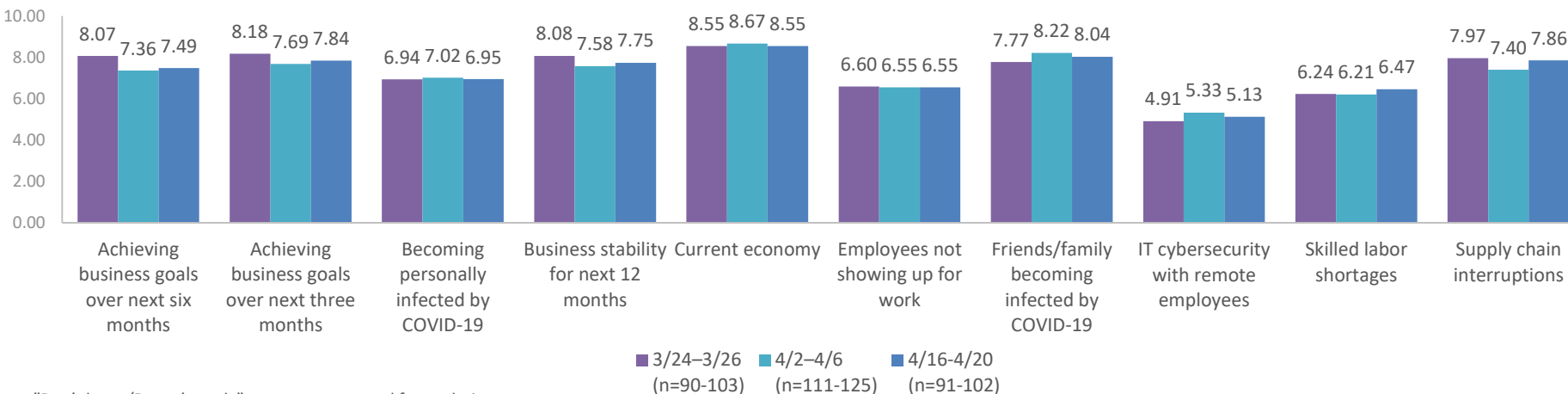
## Food & Beverage Mfg. Industry Areas of Concern

% Concerned (8-10 Rating)



## Food & Beverage Mfg. Industry Areas of Concern

Mean Rating (1-10 scale)



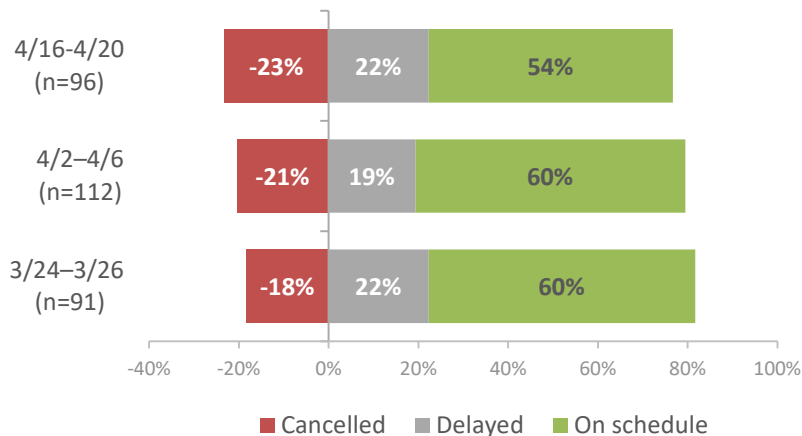
"Don't know/Doesn't apply" responses removed for analysis purposes

Q100. Please indicate your level of concern with each of the following:

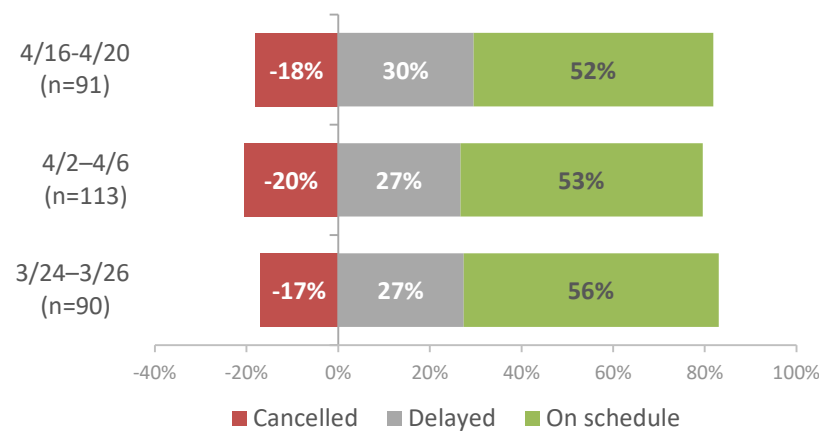
# Food & Beverage Mfg. Business Outlook (Cont.)

April 16 – 20, 2020

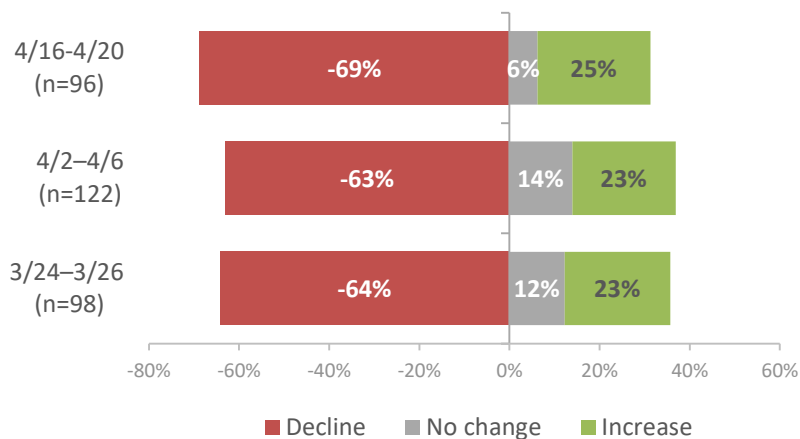
## Active Business



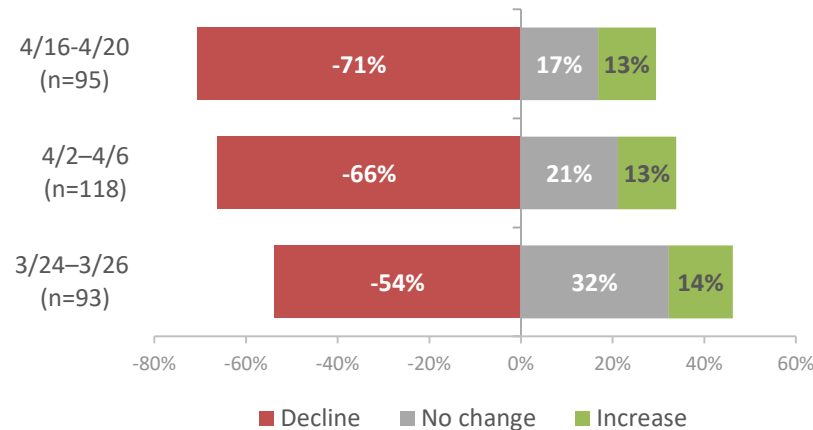
## Planned Business



## Change in New Business Development Activity



## Change in Business Spending (Equip., Prod., Tech., Service)



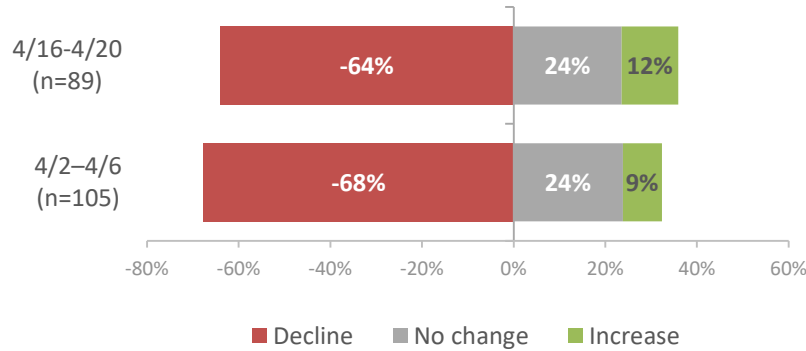
"Don't know/Doesn't apply" responses removed for analysis purposes

Q110. In light of recent events, what percent of...?

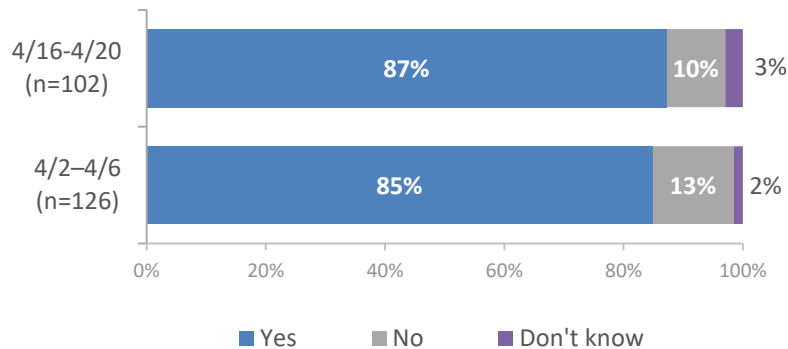
Q120. Relative to one year ago, how is new business development activity being impacted? (Select ONE)

Q125. How is planned 2020 business spending on equipment, products, technology, services, etc. being impacted? (Select ONE)

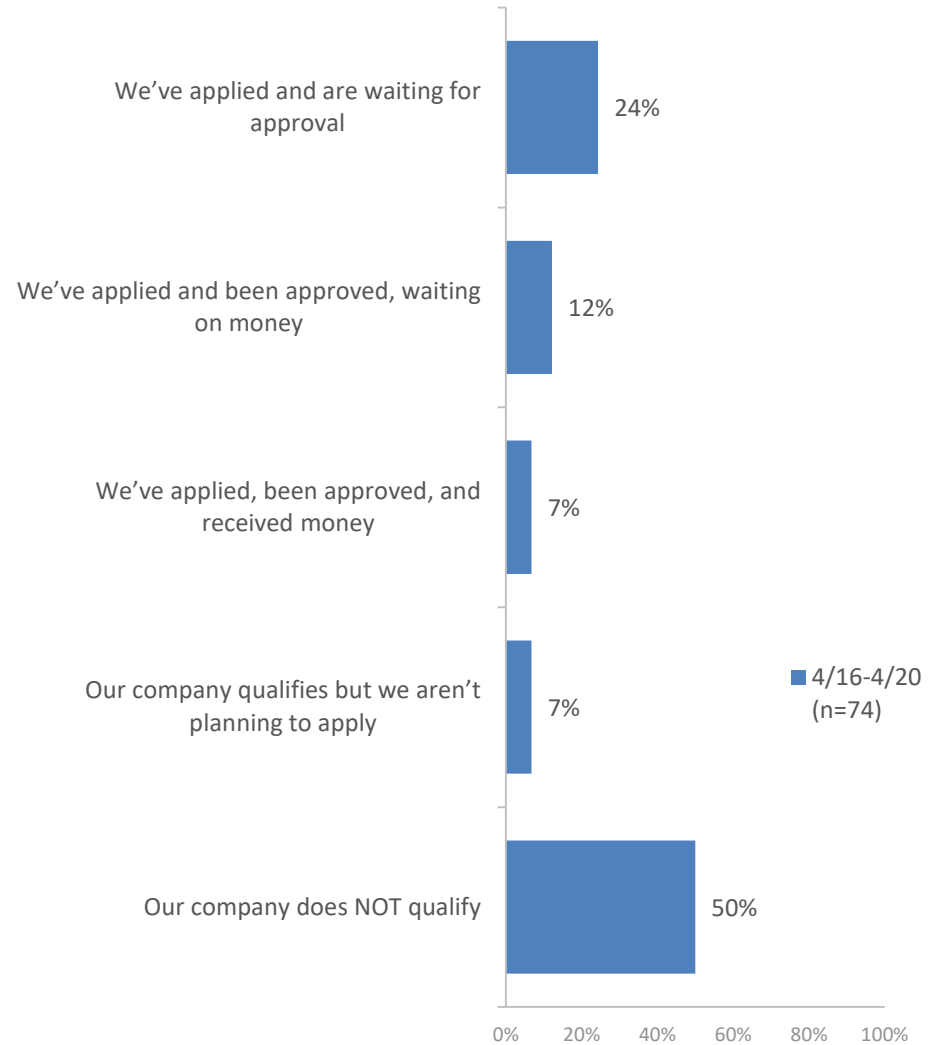
## Changes in 2020 Marketing Budgets<sup>1 3</sup>



## Organization is Classified as an "Essential business"<sup>1</sup>



## Organization Applying for Small Business Stimulus Loan<sup>2 3</sup>



<sup>1</sup>New question asked following Wave 1: 3/24-3/26

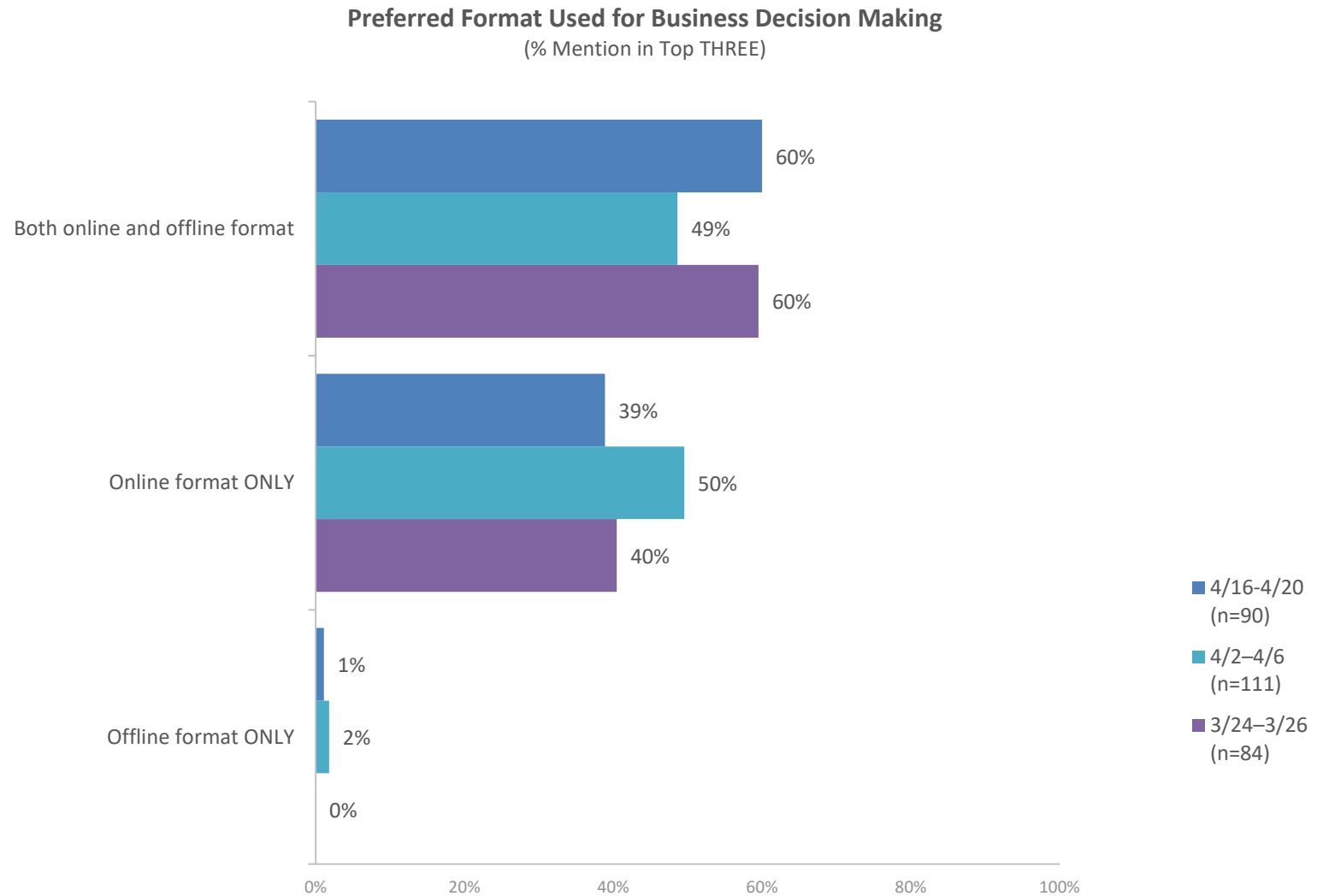
<sup>2</sup>New question asked following Wave 2: 4/2-4/6

<sup>3</sup>"Don't know/Doesn't apply" responses removed for analysis purposes

Q112. Does your organization fall into the classification of "Essential" business as currently defined by your State?

Q114. How is your organization benefiting from the small business stimulus loan offered through the Coronavirus Aid, Relief and Economic Security, or CARES, Act?

Q127. How are planned 2020 marketing budgets being impacted? (Select ONE)



"Don't know/Doesn't apply" responses removed for analysis purposes

Q150. Which THREE information sources are you relying MOST on to inform business decision making today?

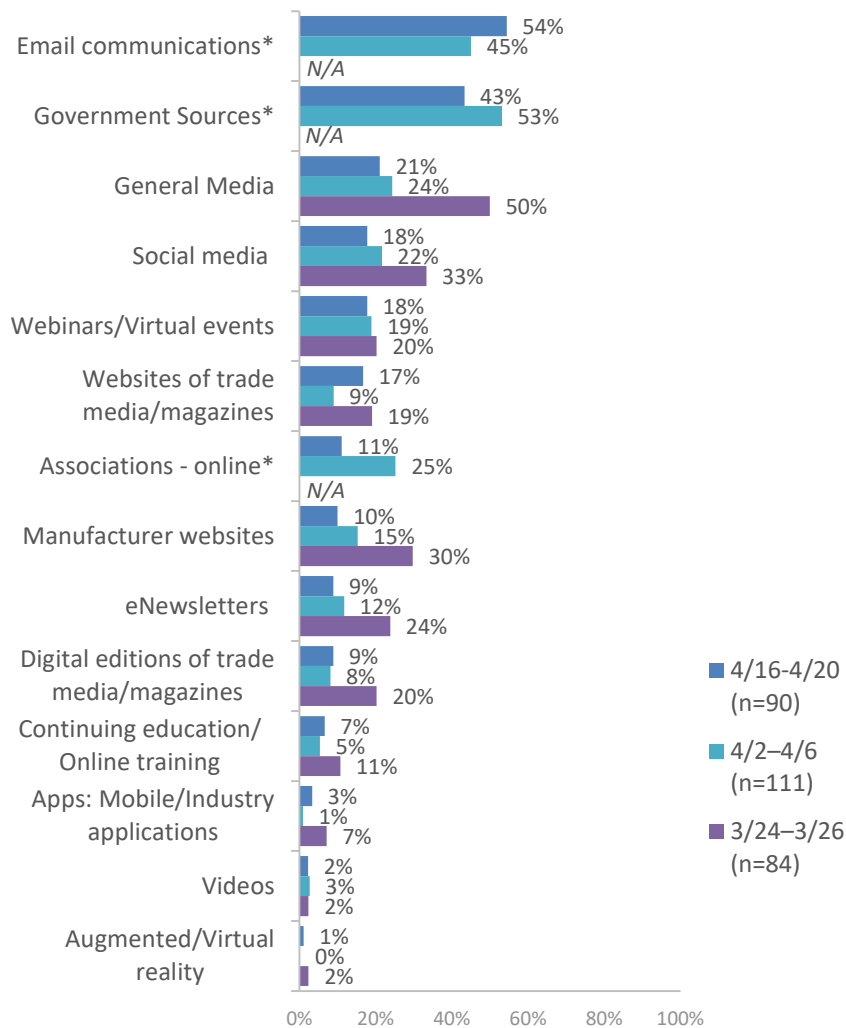


# Food & Beverage Mfg. Industry Relied Upon Information Sources (Cont.)

April 16 – 20, 2020

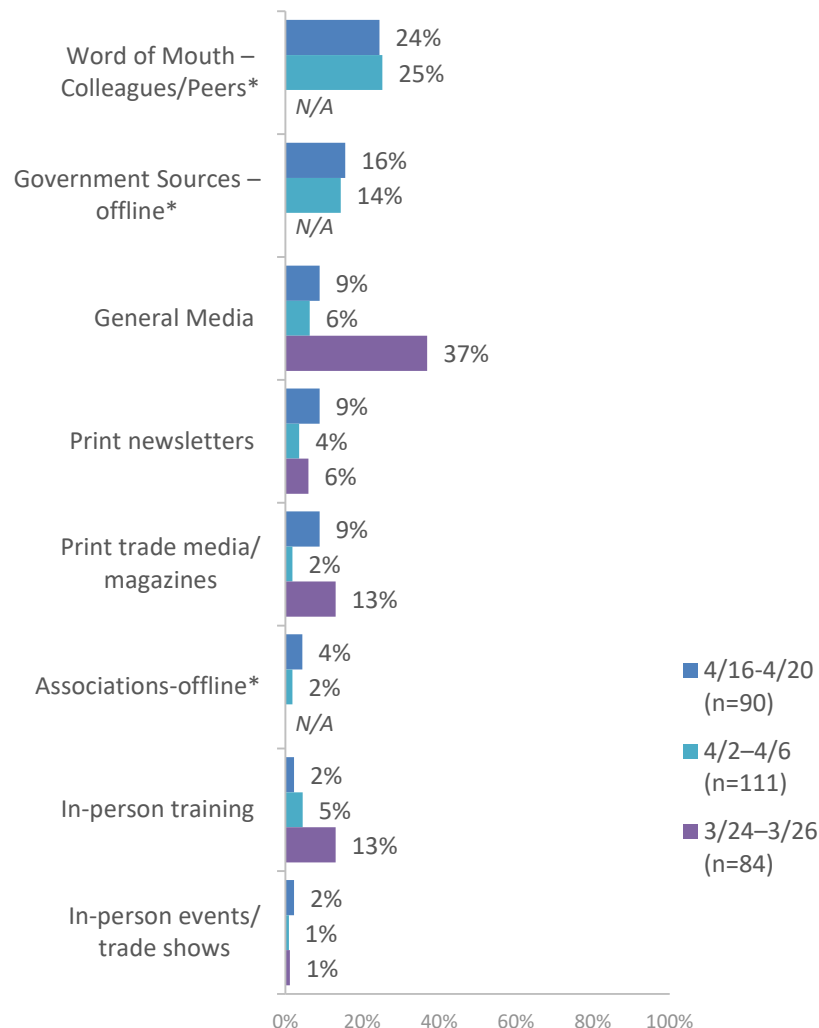
## Online Formats Used for Business Decision Making

(% Mention in Top THREE)



## Offline Formats Used for Business Decision Making

(% Mention in Top THREE)

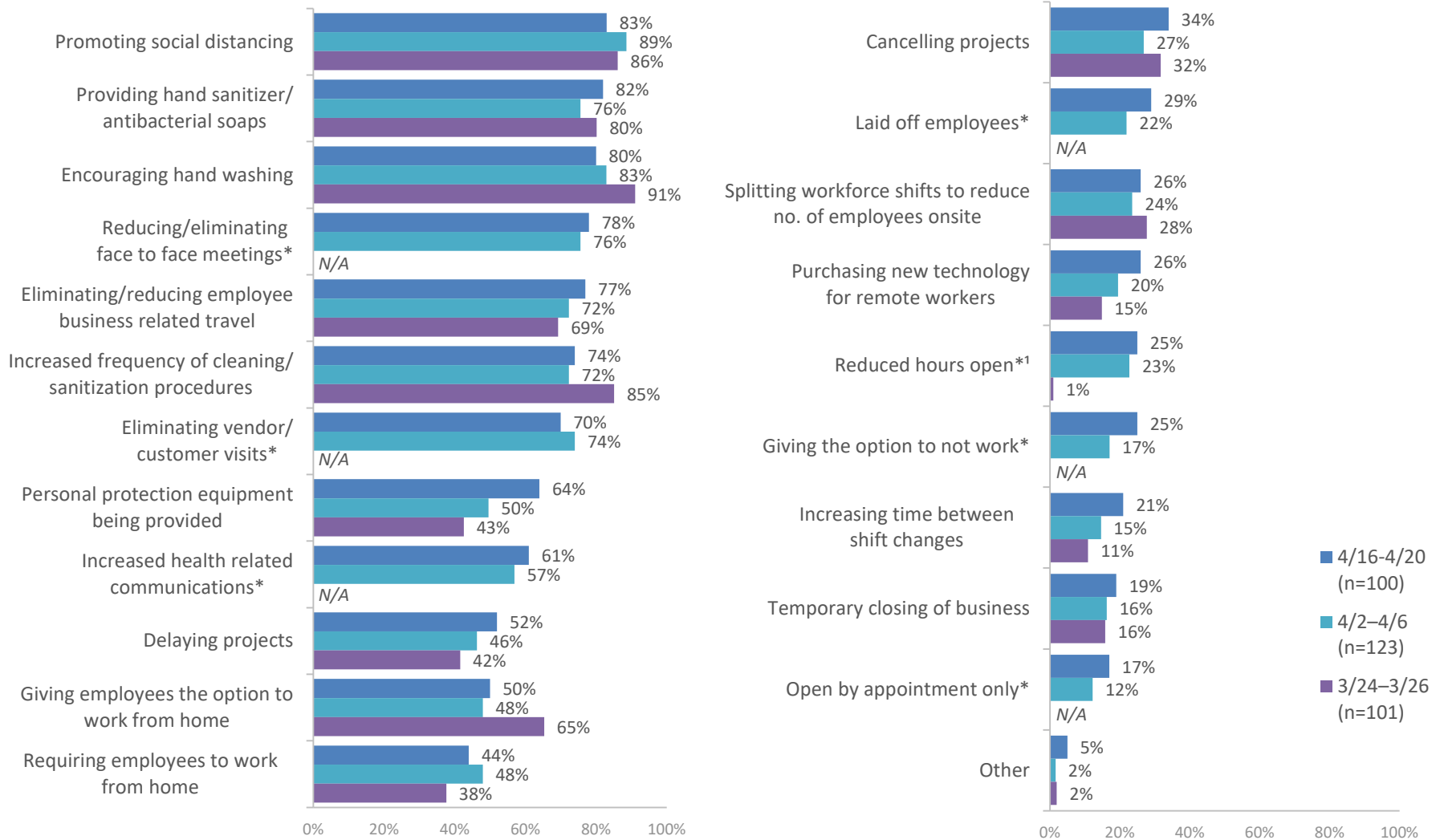


\*Code added following Wave 1: 3/24 – 3/26

"Don't know/Doesn't apply" responses removed for analysis purposes

Q150. Which THREE information sources are you relying MOST on to inform business decision making today?

## Actions Being Taken to Keep Employees Healthy



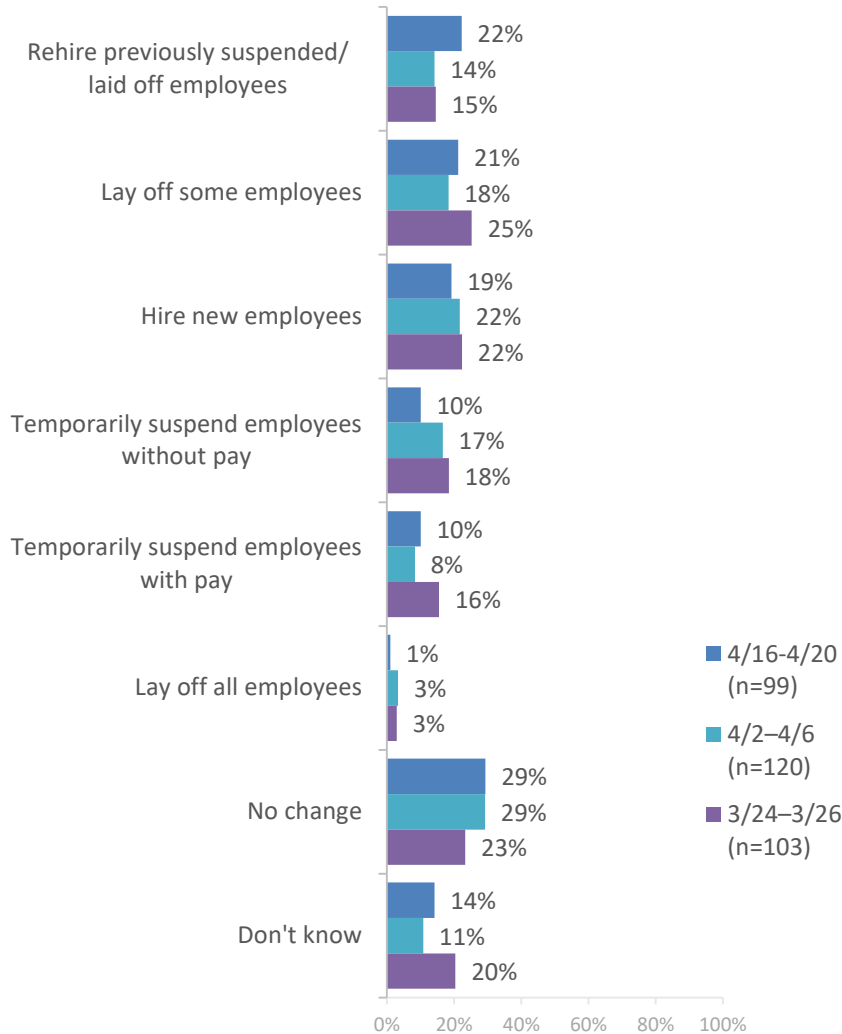
\*Code added following Wave 1: 3/24 – 3/26

<sup>1</sup> Code created from Wave 1 write-in response

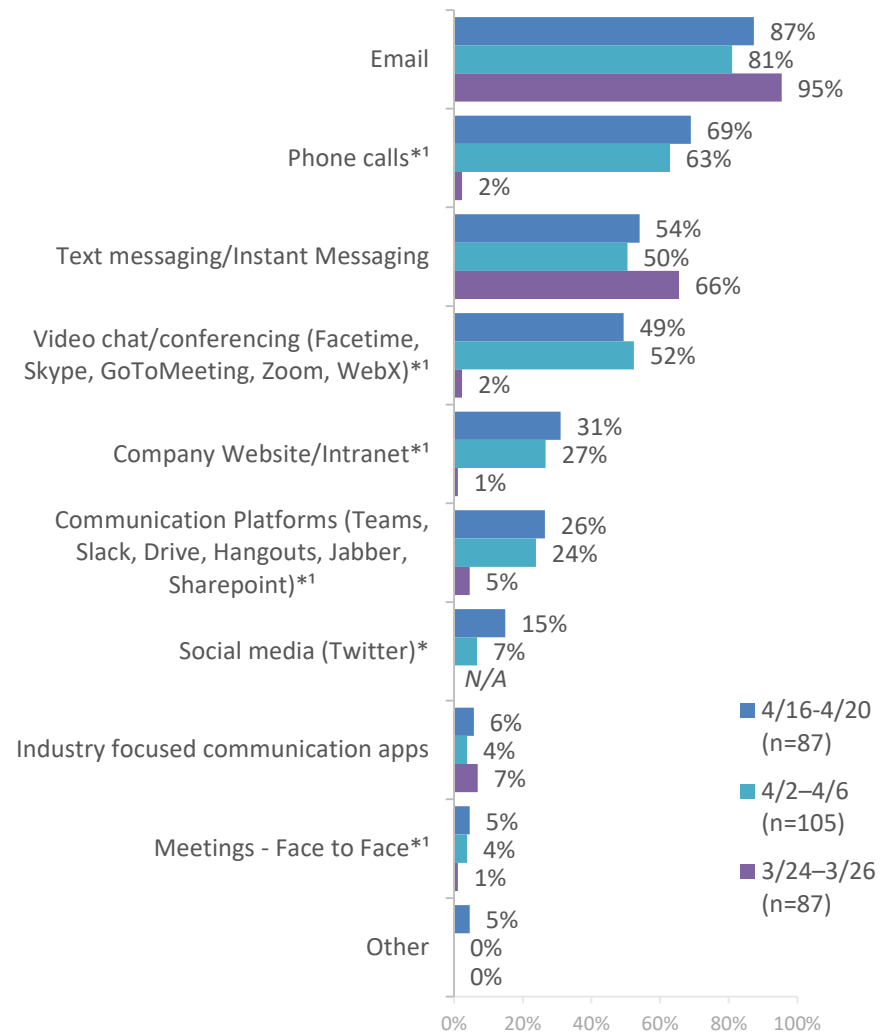
"Don't know/Doesn't apply" responses removed for analysis purposes

Q130. Which of the following actions has your company recently taken to keep employees healthy? (Select all that apply)

## Anticipated Workforce Changes in Next 3 Months



## Employee Mass Communication Tool Implementation



\*Code added following Wave 1: 3/24 – 3/26

<sup>1</sup> Code created from Wave 1 write-in response

"Don't know/Doesn't apply" responses removed for analysis purposes

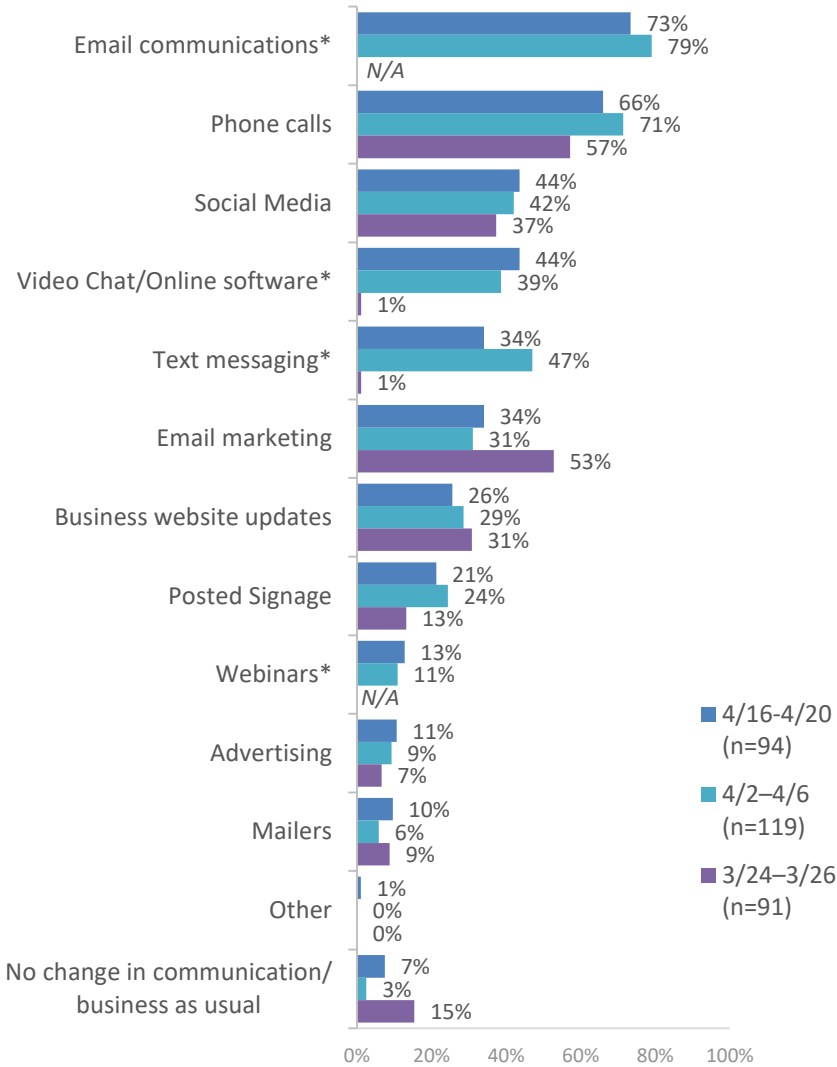
Q115. What workforce changes do you anticipate at your company in the next 3 months? (Select all that apply)

Q153. What mass notification tools have you employed to communicate quickly with remote employees?

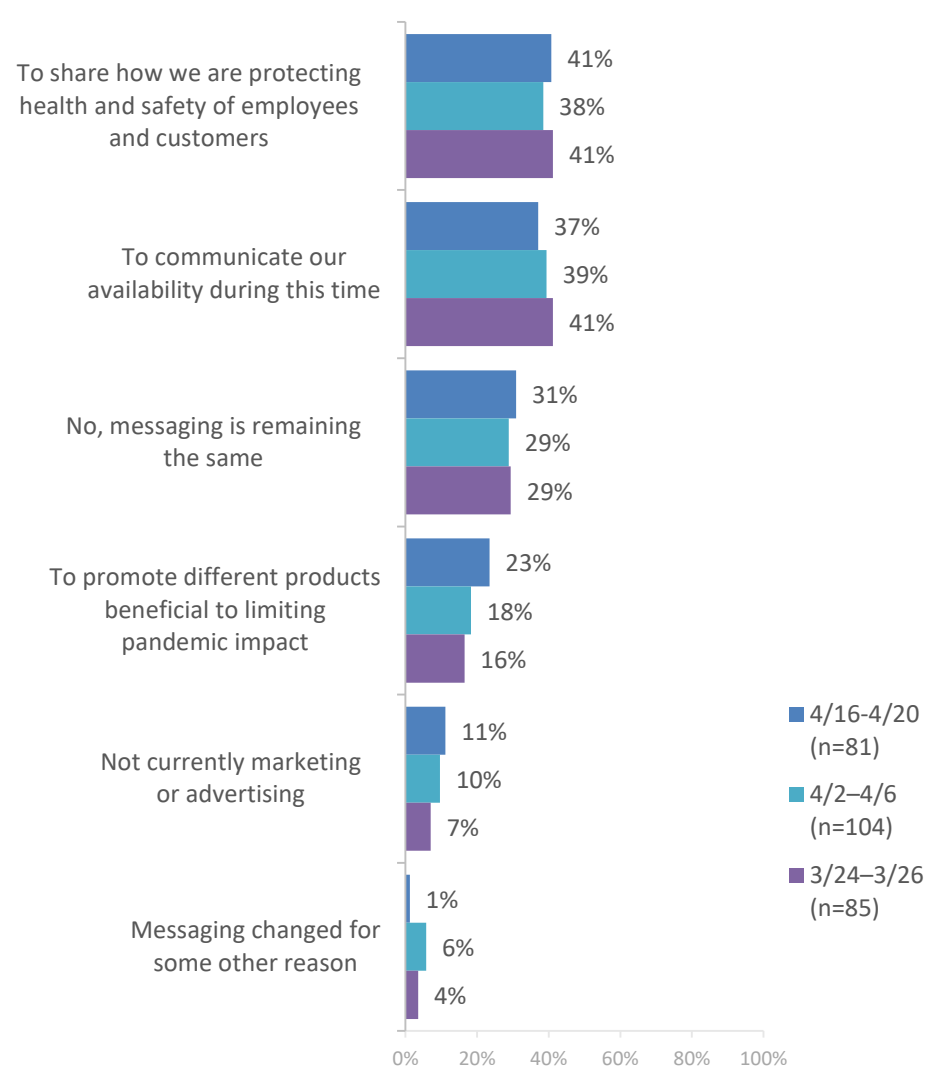
# Food & Beverage Mfg. Industry Customer Engagement

April 16 – 20, 2020

## Currently Communicating with Customers Via...



## Changes in Marketing/Advertising



\*Code added following Wave 1: 3/24 – 3/26

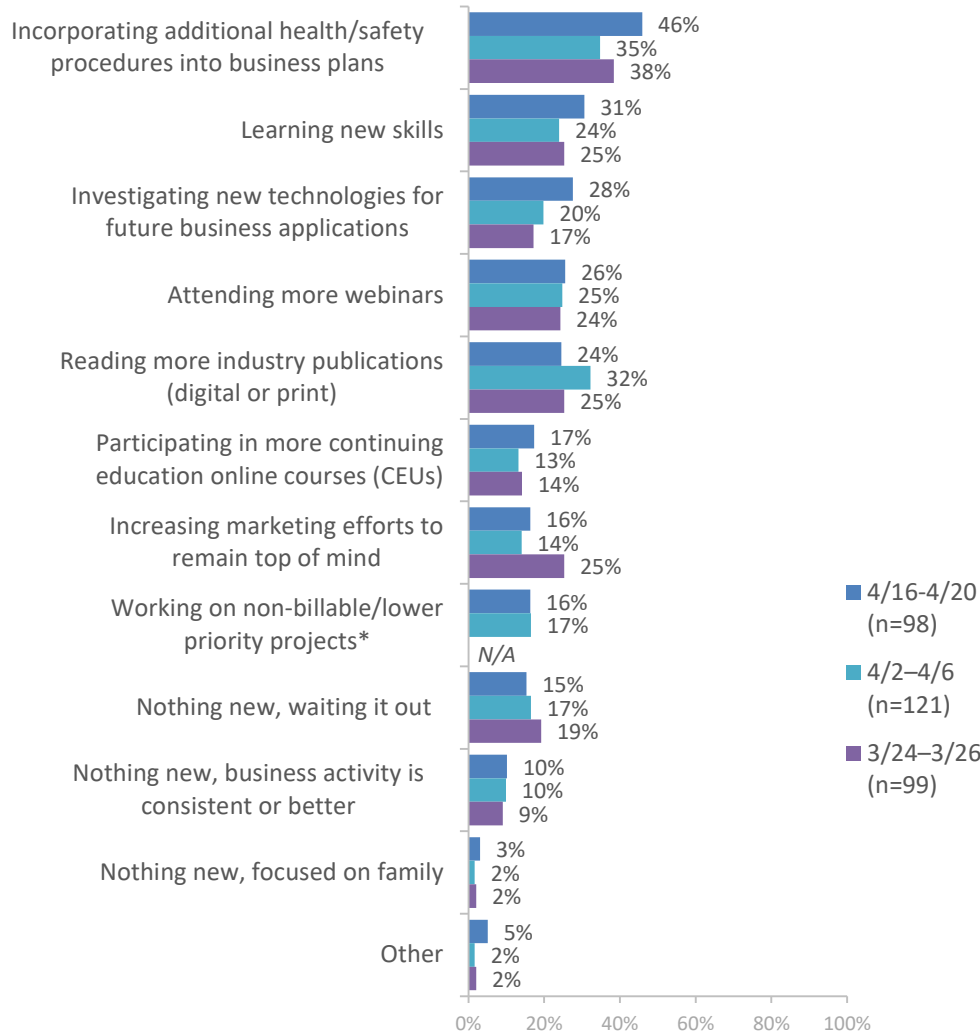
<sup>1</sup> Code created from Wave 1 write-in response

"Don't know/Doesn't apply" responses removed for analysis purposes

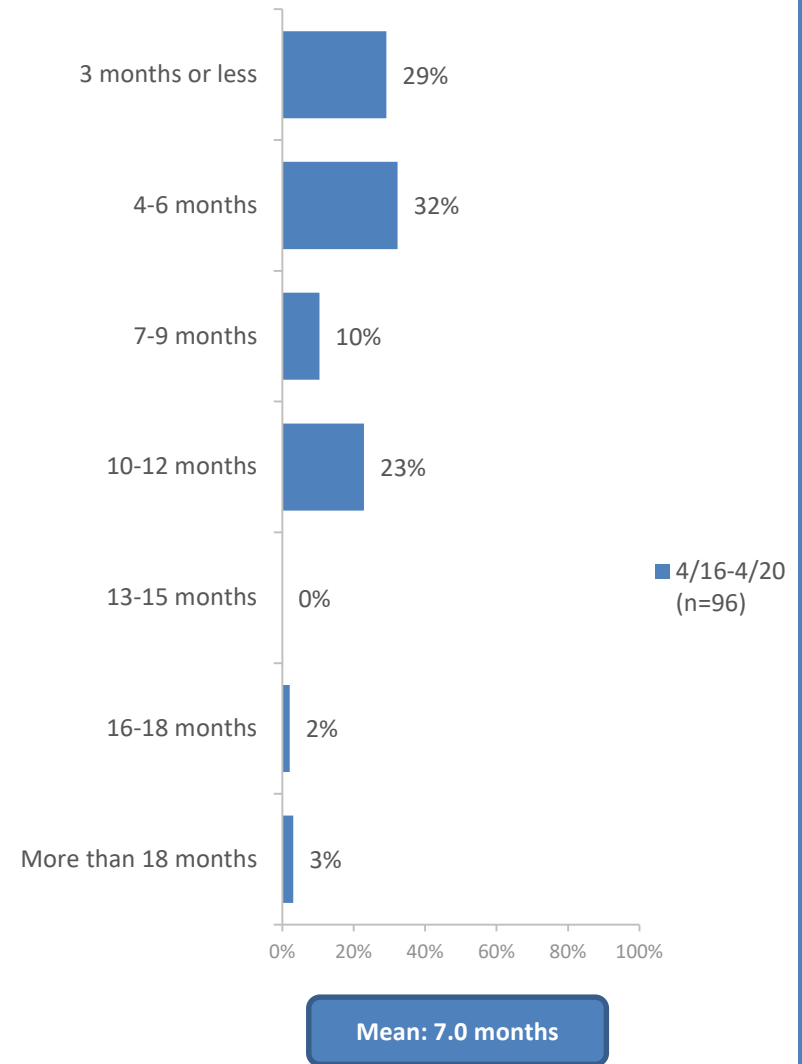
Q140. How are you currently communicating with your customer base during this time? (Select all that apply)

Q145. Have you changed the company/brand message shared in marketing and advertising efforts as a result of the pandemic?

## Activities of Greater Focus Today Relative to 6 Months Ago



## Estimated Time for Business to Get Back on Track<sup>1</sup>



\*Code added following Wave 1: 3/24 – 3/26

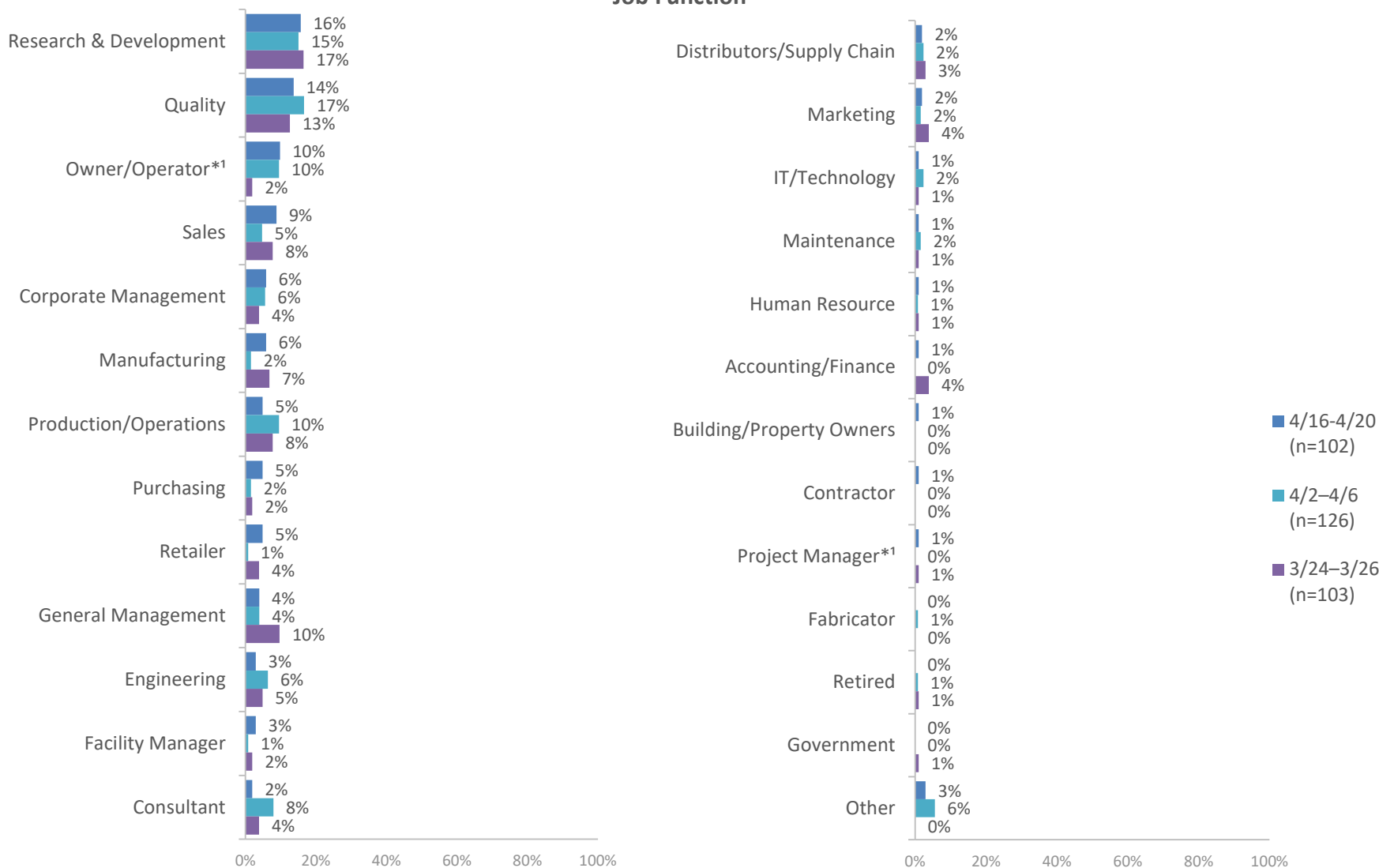
<sup>1</sup> Question asked for Wave 3: 4/16-4/20

“Don’t know/Doesn’t apply” responses removed for analysis purposes

Q155. Which of the following are you doing MORE now than you were six months ago to prepare yourself and your business for when things turn around? (Select all that apply)

Q157. Roughly, how long do you think it will take from today, for your business to get back on track?

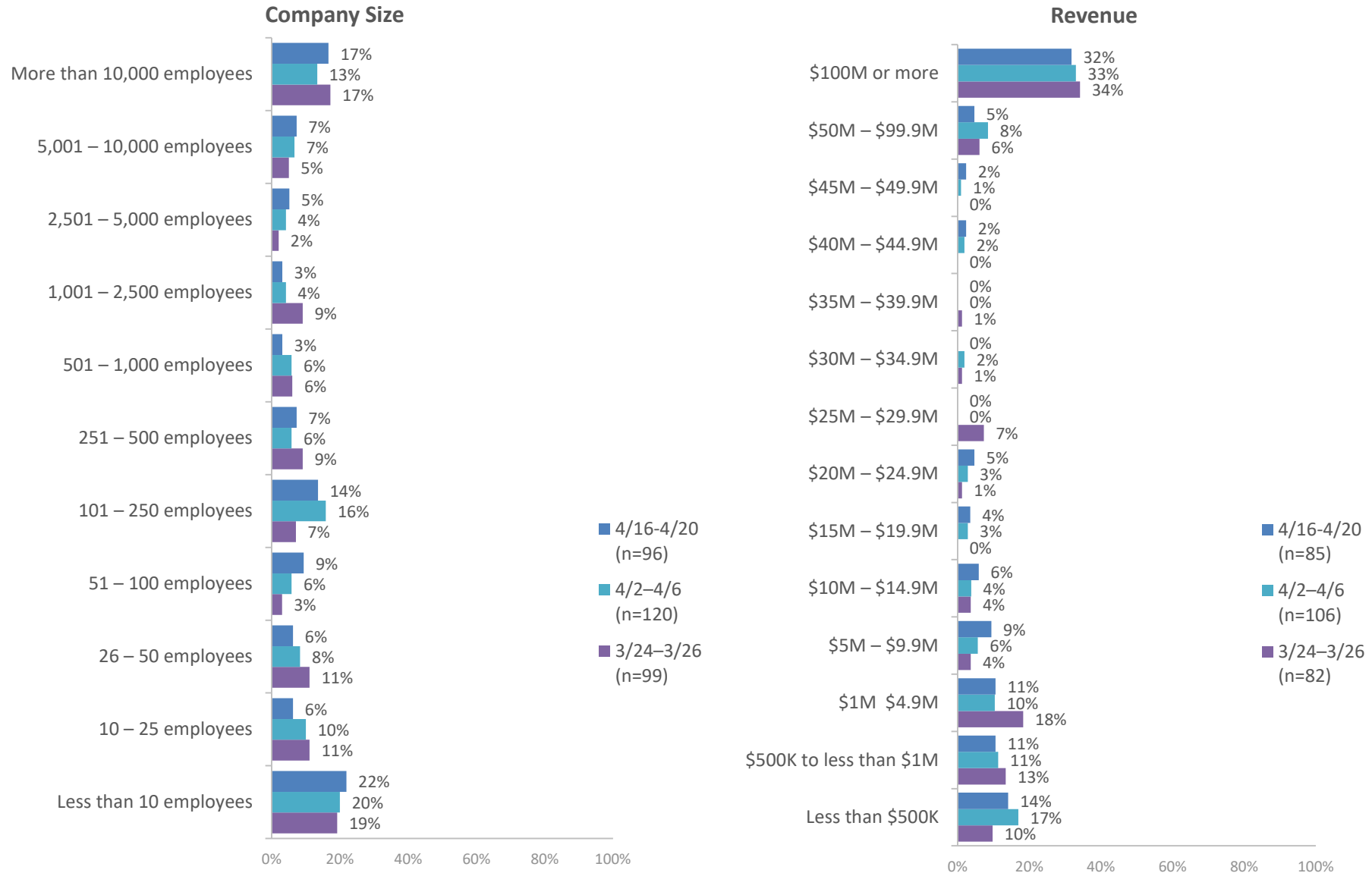
## Job Function



\*Code added following Wave 1: 3/24 – 3/26

<sup>1</sup> Code created from Wave 1 write-in response

QJob. Which of the following most closely describes your job function?

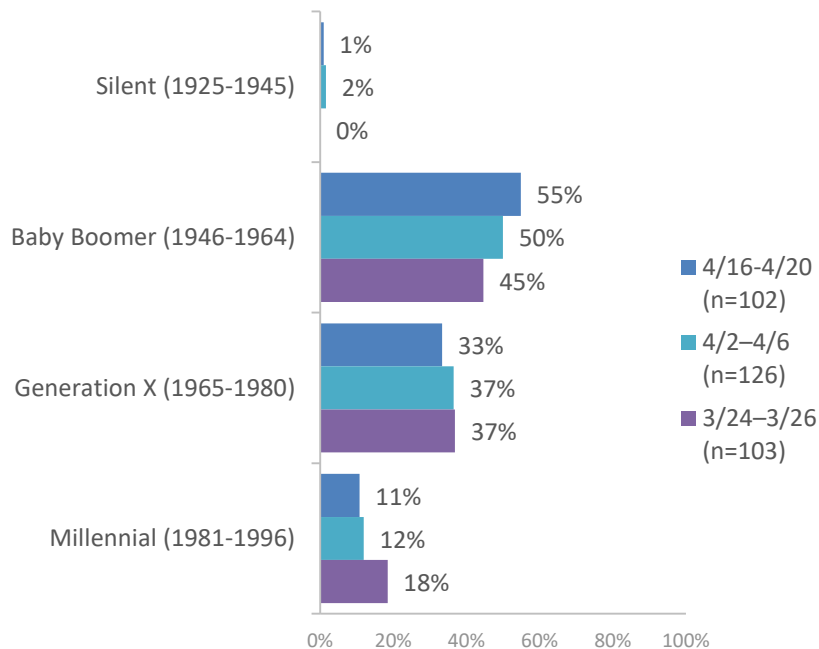


“Prefer not to answer/Don’t know” responses removed for analysis purposes

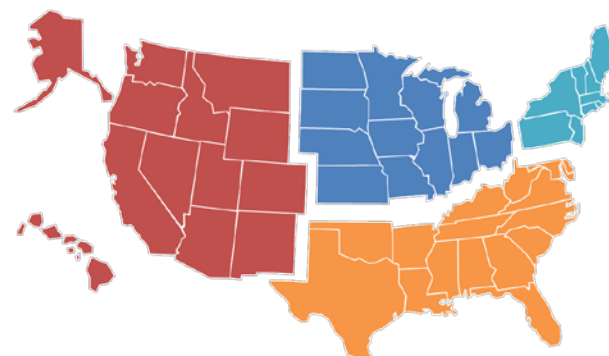
QRevenue. What was your company’s total annual revenue for 2019?

QEmployees. Including yourself, how many employees does your company employ, across all locations?

## Age



## Regional Representation



	Northeast	Midwest	South	West	Other U.S. Territory
4/16-4/20 (n=102)	28%	28%	25%	18%	0%
4/2-4/6 (n=126)	21%	33%	22%	23%	0%
3/24-3/26 (n=103)	18%	37%	26%	18%	0%

QState. In which state do you currently live?  
 QBorn. In what year were you born?





# Clear Seas

## RESEARCH

*Making the complex clear*

### **Industry Knowledge**

Clear Seas Research's extensive network of industry experts and professional trade associations maximizes accuracy within studies and promotes interaction with the target audience. Utilizing a team of qualified, experienced market analysts Clear Seas Research provides actionable results with solid research recommendations.

### **Clear Insight**

Through expert insight and actionable results Clear Seas Research facilitates superior decision making in today's business world.

### **For more information please contact:**

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Dan Van Buhler at 248.786.1701 or [vanbuhlerd@clearseasresearch.com](mailto:vanbuhlerd@clearseasresearch.com)

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