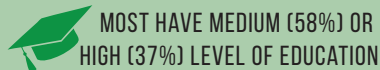


MOVEABLE MASSES

HEAVY FOOD FOOTPRINT BUT OPEN TO CHANGE



DEMOGRAPHIC PROFILE:



MATERIALISM

•MOST MATERIALISTIC SEGMENT•



- 30% SAY OWNING A BIG HOUSE
- 18% SAY OWNING A LUXURY CAR

...IS A VERY IMPORTANT LIFE-GOAL

INFLUENCE POTENTIAL

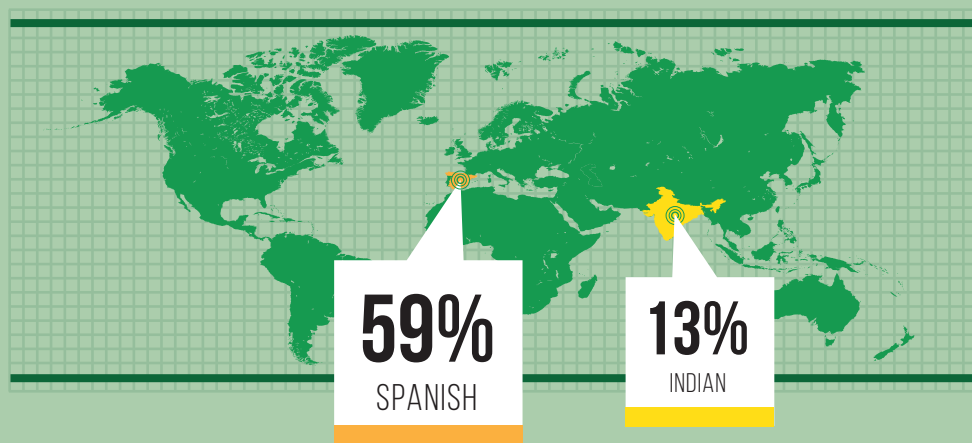
•MODERATE•



43% SAY THEY MODERATELY ENCOURAGE FRIENDS AND/OR PEERS TO MAKE FOOD CHOICES THAT REDUCE THEIR DETRIMENTAL IMPACT ON THE ENVIRONMENT

► THE LARGEST SEGMENT ACROSS THE 18 MARKETS SURVEYED, THE **MOVEABLE MASSES** SEGMENT CONSUMES A LOT OF FOOD WITH A HEAVY ENVIRONMENTAL FOOTPRINT, BUT IS OPEN TO CHANGING ITS BEHAVIOR AND HAS GOOD INTENTIONS TO START EATING MORE ENVIRONMENTALLY RESPONSIBLY.

GLOBAL SIZE OF SEGMENT 37%



- LARGEST COUNTRY PRESENCE
- SMALLEST COUNTRY PRESENCE

CHARACTERISTIC FOOD BEHAVIOR

•GOOD INTENTIONS BUT NEED MORE INFORMATION•



EMPOWERMENT

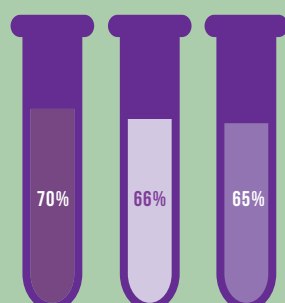
•LOW•



- 47% BELIEVE THEY CAN INFLUENCE WHAT TYPES OF FOODS ARE AVAILABLE WHERE THEY SHOP
- 43% AGREE CONSUMERS HAVE LITTLE INFLUENCE OVER THE WAY FOOD IS PRODUCED
- MORE LIKELY TO THINK THERE IS LITTLE INDIVIDUALS CAN DO ABOUT SOCIETY'S ENVIRONMENTAL IMPACT (38%) THAN TO THINK THEY CAN DO SOMETHING (33%)

TRUST IN SCIENCE

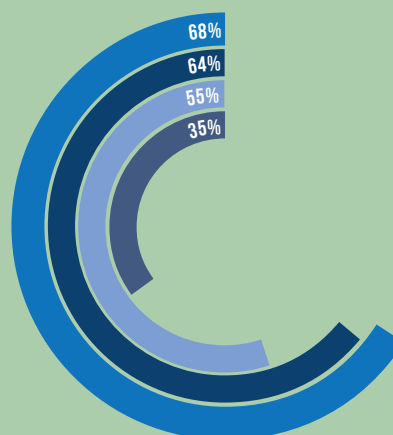
•HIGH•



- 70% AGREE MOST SCIENTISTS ARE CONVINCED THAT HUMAN ACTIVITY CAUSES CLIMATE CHANGE AND GLOBAL WARMING
- 66% AGREE WITH SCIENTISTS' CLAIM THAT THE WAY WE PRODUCE AND CONSUME FOOD TODAY OFTEN NEGATIVELY AFFECTS OUR HEALTH
- 65% AGREE WITH SCIENTISTS' CLAIM THAT THE WAY WE PRODUCE AND CONSUME FOOD TODAY OFTEN NEGATIVELY AFFECTS THE ENVIRONMENT

ATTITUDE TOWARDS ENVIRONMENTAL PROBLEMS

•ENVIRONMENTALLY CONSCIOUS•



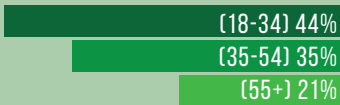
- 68% ARE VERY CONCERNED ABOUT ENVIRONMENTAL PROBLEMS
- 64% AGREE THAT AS A SOCIETY, WE WILL NEED TO CONSUME A LOT LESS TO IMPROVE THE ENVIRONMENT FOR FUTURE GENERATIONS
- 55% SAY THEY ARE CURRENTLY TRYING VERY HARD TO REDUCE THEIR OWN NEGATIVE IMPACT ON THE ENVIRONMENT
- 35% FEEL GUILTY ABOUT THEIR IMPACT ON THE ENVIRONMENT

CONFLICTED

MODEST FOOD FOOTPRINT AND LOW LEVELS OF CONCERNS AND EMPOWERMENT



DEMOGRAPHIC PROFILE:



MATERIALISM

•MODERATELY MATERIALISTIC•



...IS A VERY IMPORTANT LIFE-GOAL

INFLUENCE POTENTIAL

•LOW•

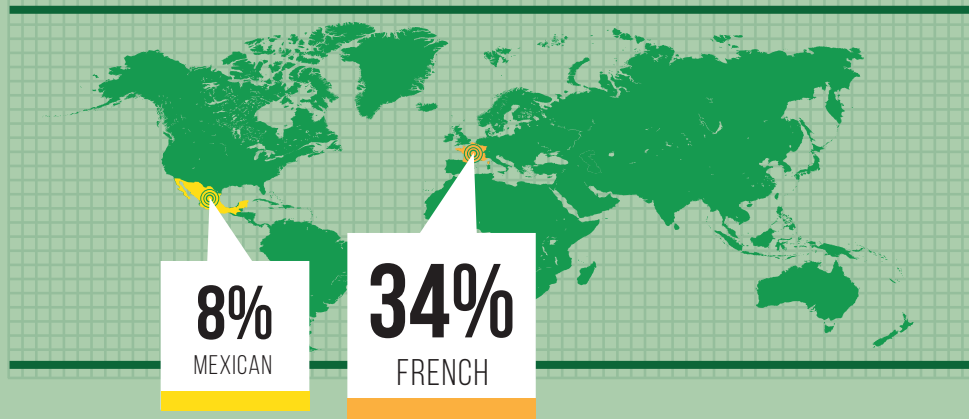


50% SAY THEY DO NOT ENCOURAGE FRIENDS AND/OR PEERS TO MAKE FOOD CHOICES THAT REDUCE THEIR DETRIMENTAL IMPACT ON THE ENVIRONMENT



A RELATIVELY SMALL SEGMENT ACROSS THE 18 MARKETS SURVEYED, THE **CONFLICTED** SEGMENT ALREADY DISPLAYS ENVIRONMENTALLY RESPONSIBLE EATING HABITS AND WANTS TO IMPROVE EVEN FURTHER, BUT LACKS MOTIVATION AND INFORMATION.

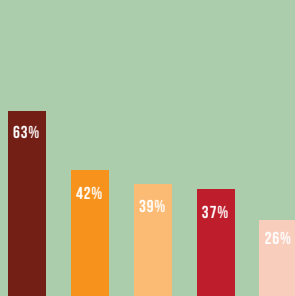
GLOBAL SIZE OF SEGMENT 17%



- LARGEST COUNTRY PRESENCE
- SMALLEST COUNTRY PRESENCE

CHARACTERISTIC FOOD BEHAVIOR

•LACK OF INFORMATION AND INTEREST ARE BARRIERS TO FURTHER IMPROVEMENT•



- 63% THINK BUYING LOCALLY PRODUCED FOODS HELPS THE LOCAL ECONOMY
- 42% UNDERSTAND WHAT "ORGANIC" MEANS WHEN REFERRING TO FOOD
- 39% THINK IT'S DIFFICULT TO TELL THE DIFFERENCE BETWEEN LOCALLY PRODUCED FOODS AND THOSE THAT COME FROM FAR AWAY
- 37% AGREE IT'S WORTH IT TO PAY MORE FOR LOCAL OR ORGANIC FOODS
- 26% FEEL WELL INFORMED ABOUT THE QUALITY, SAFETY, AND ORIGIN OF THEIR FOOD

EMPOWERMENT

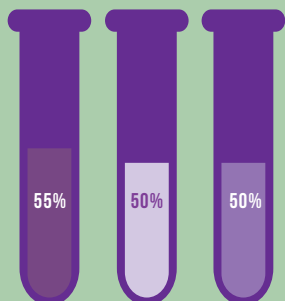
•LOW•



- 39% BELIEVE CONSUMERS HAVE LITTLE INFLUENCE OVER THE WAY FOOD IS PRODUCED
- 32% AGREE THEY CAN INFLUENCE WHAT TYPES OF FOODS ARE AVAILABLE WHERE THEY SHOP
- CLOSELY DIVIDED BETWEEN THOSE WHO THINK THERE IS LITTLE INDIVIDUALS CAN DO ABOUT SOCIETY'S EFFECT ON THE ENVIRONMENT (32%) AND THOSE WHO THINK INDIVIDUALS CAN DO SOMETHING (28%)

TRUST IN SCIENCE

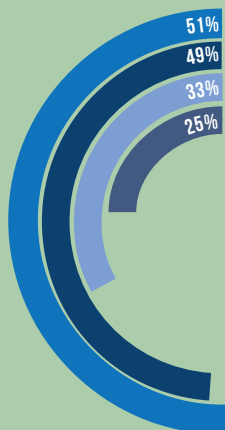
•MODERATE•



- 55% AGREE MOST SCIENTISTS ARE CONVINCED THAT HUMAN ACTIVITY CAUSES CLIMATE CHANGE AND GLOBAL WARMING
- 50% AGREE WITH SCIENTISTS' CLAIM THAT THE WAY WE PRODUCE AND CONSUME FOOD TODAY OFTEN NEGATIVELY AFFECTS OUR HEALTH
- 50% AGREE WITH SCIENTISTS' CLAIM THAT THE WAY WE PRODUCE AND CONSUME FOOD TODAY OFTEN NEGATIVELY AFFECTS THE ENVIRONMENT

ATTITUDE TOWARDS ENVIRONMENTAL PROBLEMS

•LESS ENVIRONMENTALLY CONSCIOUS•



- 51% AGREE THAT AS A SOCIETY, WE WILL NEED TO CONSUME A LOT LESS TO IMPROVE THE ENVIRONMENT FOR FUTURE GENERATIONS
- 49% ARE VERY CONCERNED ABOUT ENVIRONMENTAL PROBLEMS
- 33% SAY THEY ARE CURRENTLY TRYING VERY HARD TO REDUCE THEIR OWN NEGATIVE IMPACT ON THE ENVIRONMENT
- 25% FEEL GUILTY ABOUT THEIR IMPACT ON THE ENVIRONMENT

MOTIVATED GREENS

MOST MOTIVATED TO IMPROVE FOOD FOOTPRINT



DEMOGRAPHIC PROFILE:



MOST LIVE IN URBAN AREAS 66%



MOST HAVE AVERAGE (44%) OR LOW (31%) INCOME



MOST (65%) HAVE MEDIUM LEVEL OF EDUCATION



MOST (65%) HAVE NO CHILDREN (18 OR YOUNGER)

MATERIALISM

•MODERATELY MATERIALISTIC•



23% SAY OWNING A BIG HOUSE
11% SAY OWNING A LUXURY CAR

...IS A VERY IMPORTANT LIFE-GOAL

INFLUENCE POTENTIAL

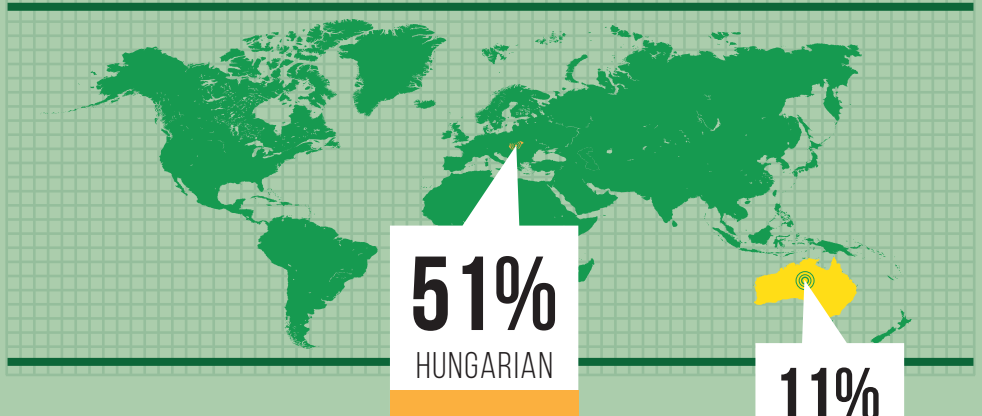
•MODERATE•



40% SAY THEY MODERATELY ENCOURAGE FRIENDS AND/OR PEERS TO MAKE FOOD CHOICES THAT REDUCE THEIR DETRIMENTAL IMPACT ON THE ENVIRONMENT

▶ THE SECOND LARGEST SEGMENT ACROSS THE 18 MARKETS SURVEYED, THE **MOTIVATED GREENS** SEGMENT IS THE MOST ECOLOGICALLY DRIVEN SEGMENT. IT ALREADY DISPLAYS ENVIRONMENTALLY RESPONSIBLE EATING HABITS, AND IS MOTIVATED TO IMPROVE EVEN FURTHER

GLOBAL SIZE OF SEGMENT 27%



■ LARGEST COUNTRY PRESENCE
■ SMALLEST COUNTRY PRESENCE

CHARACTERISTIC FOOD BEHAVIOR

•ENVIRONMENTALLY CONSCIOUS CONSUMERS•



EMPOWERMENT

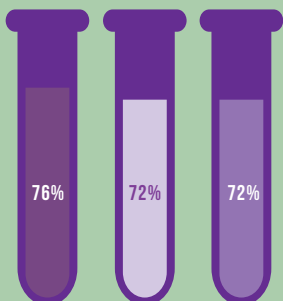
•MODEST•



- 44% AGREE THEY CAN INFLUENCE WHAT TYPES OF FOODS ARE AVAILABLE WHERE THEY SHOP
- 43% BELIEVE CONSUMERS HAVE LITTLE INFLUENCE OVER THE WAY FOOD IS PRODUCED
- CLOSELY DIVIDED BETWEEN THOSE WHO THINK THERE IS LITTLE INDIVIDUALS CAN DO ABOUT SOCIETY'S EFFECT ON THE ENVIRONMENT (37%) AND THOSE WHO THINK INDIVIDUALS CAN DO SOMETHING (36%)

TRUST IN SCIENCE

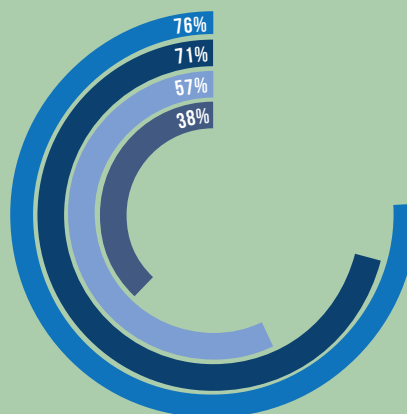
•HIGH•



- 76% AGREE MOST SCIENTISTS ARE CONVINCED THAT HUMAN ACTIVITY CAUSES CLIMATE CHANGE AND GLOBAL WARMING
- 72% AGREE WITH SCIENTISTS' CLAIM THAT THE WAY WE PRODUCE AND CONSUME FOOD TODAY OFTEN NEGATIVELY AFFECTS OUR HEALTH
- 72% AGREE WITH SCIENTISTS' CLAIM THAT THE WAY WE PRODUCE AND CONSUME FOOD TODAY OFTEN NEGATIVELY AFFECTS THE ENVIRONMENT

ATTITUDE TOWARDS ENVIRONMENTAL PROBLEMS

•HIGHLY ENVIRONMENTALLY CONSCIOUS•

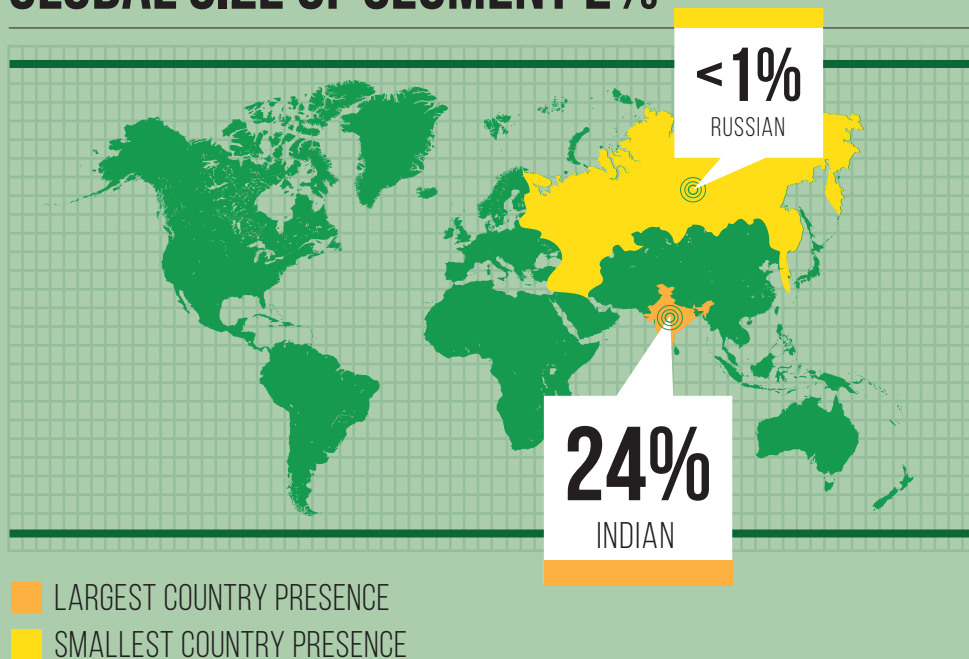


- 76% ARE VERY CONCERNED ABOUT ENVIRONMENTAL PROBLEMS
- 71% AGREE THAT AS A SOCIETY, WE WILL NEED TO CONSUME A LOT LESS TO IMPROVE THE ENVIRONMENT FOR FUTURE GENERATIONS
- 57% SAY THEY ARE CURRENTLY TRYING VERY HARD TO REDUCE THEIR OWN NEGATIVE IMPACT ON THE ENVIRONMENT
- 38% FEEL GUILTY ABOUT THEIR IMPACT ON THE ENVIRONMENT

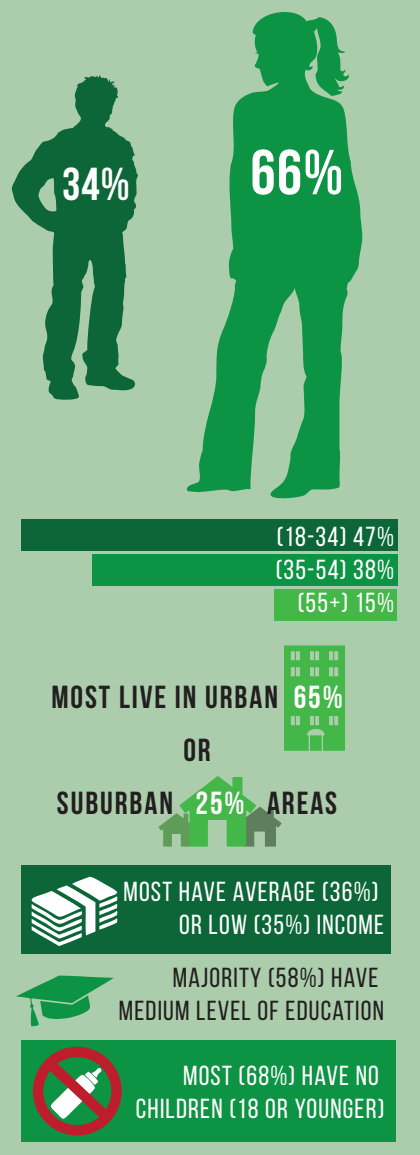


▶ A SMALL SEGMENT ACROSS THE 18 MARKETS SURVEYED, THE COMMITTED VEGETARIAN SEGMENT ALREADY DISPLAYS ENVIRONMENTALLY RESPONSIBLE EATING HABITS.

GLOBAL SIZE OF SEGMENT 2%



DEMOGRAPHIC PROFILE:



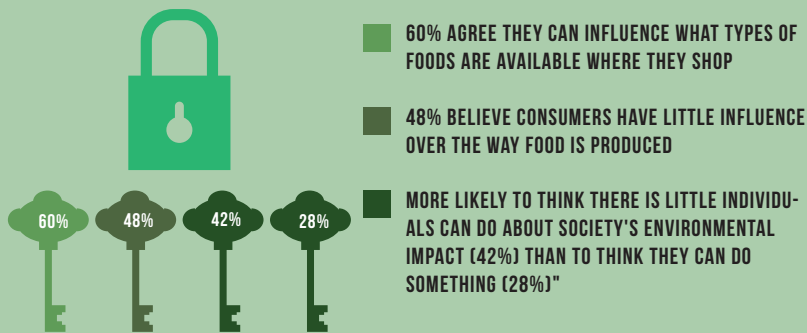
CHARACTERISTIC FOOD BEHAVIOR

•INFORMED AND ENVIRONMENTALLY CONSCIOUS•



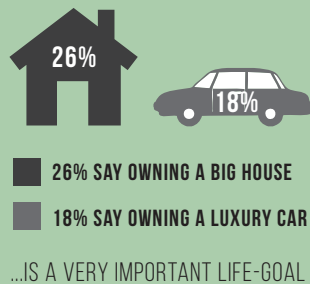
EMPOWERMENT

•MIXED•



MATERIALISM

•HIGH•



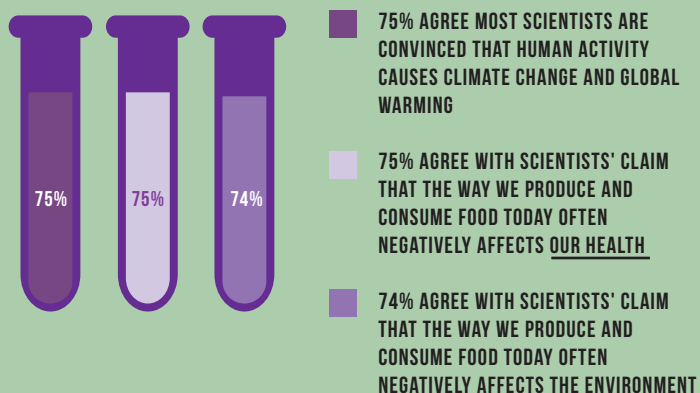
INFLUENCE POTENTIAL

•STRONG•



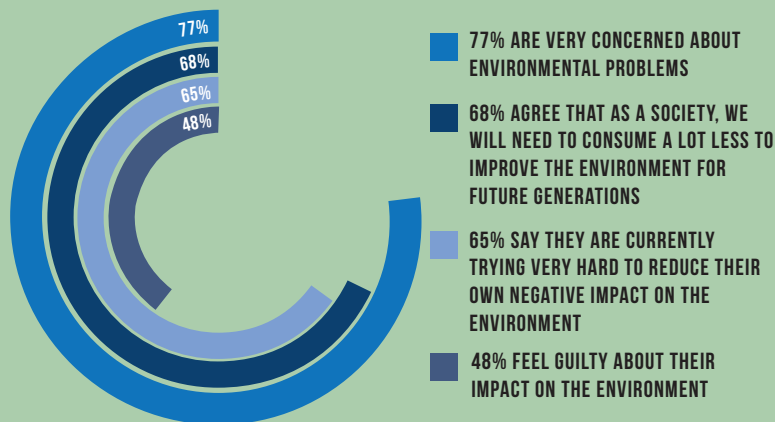
TRUST IN SCIENCE

•HIGH•



ATTITUDE TOWARDS ENVIRONMENTAL PROBLEMS

•HIGHLY ENVIRONMENTALLY CONSCIOUS•

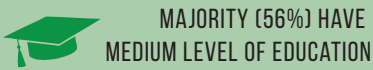
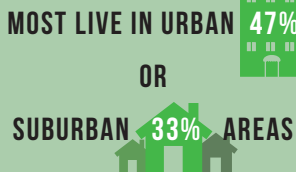
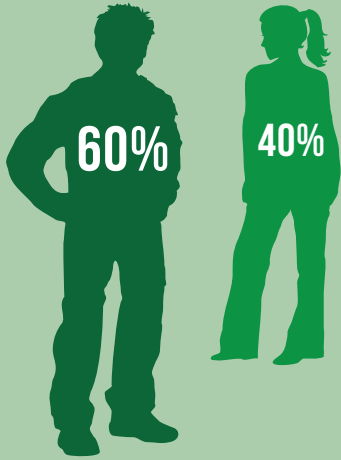


IMMOBILIZED

MODERATE FOOD FOOTPRINT AND DOES NOT INTEND TO CHANGE

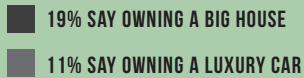


DEMOGRAPHIC PROFILE:



MATERIALISM

•LEAST MATERIALISTIC SEGMENT•



...IS A VERY IMPORTANT LIFE-GOAL

INFLUENCE POTENTIAL

•LOW•



67% SAY THEY DO NOT ENCOURAGE FRIENDS AND/OR PEERS TO MAKE FOOD CHOICES THAT REDUCE THEIR DETRIMENTAL IMPACT ON THE ENVIRONMENT

▶ A RELATIVELY SMALL SEGMENT ACROSS THE 18 MARKETS SURVEYED, THE **IMMOBILIZED** SEGMENT CONSUMES A MODERATE AMOUNT OF FOOD WITH A HEAVY ENVIRONMENTAL FOOTPRINT AND IS NOT OPEN TO CHANGING ITS BEHAVIOR.

GLOBAL SIZE OF SEGMENT 16%



- LARGEST COUNTRY PRESENCE
- SMALLEST COUNTRY PRESENCE

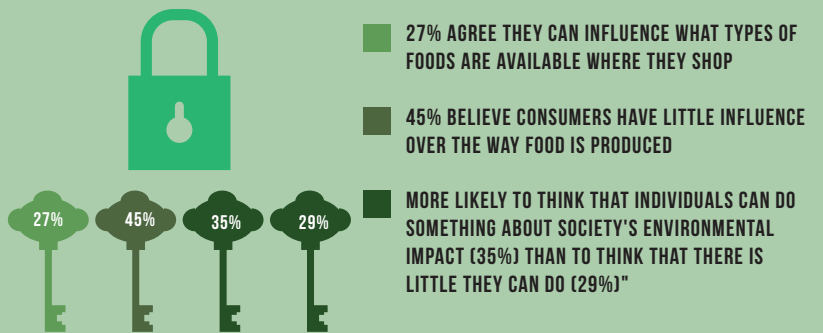
CHARACTERISTIC FOOD BEHAVIOR

•NOT ENVIRONMENTALLY CONSCIOUS IN TERMS OF FOOD•



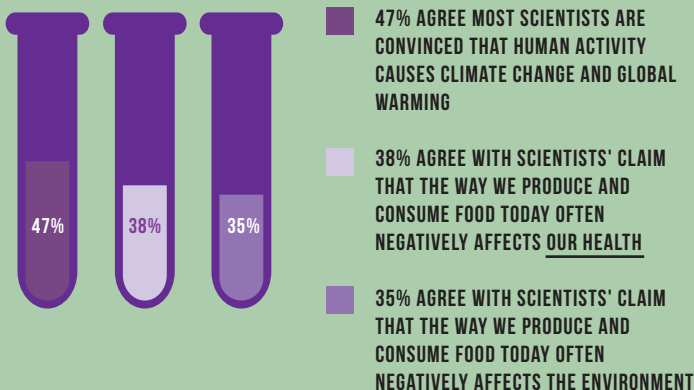
EMPOWERMENT

•MIXED•



TRUST IN SCIENCE

•LOW•



ATTITUDE TOWARDS ENVIRONMENTAL PROBLEMS

•DISENGAGED•

