



Healthy & Sustainable Living

A Global Consumer
Insights Project

2020 Highlights

7 October

Healthy & Sustainable Living

Global Consumer Insights



Hosts



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GlobeScan



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Special Guests



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Agenda



- Method
- Context
- Lifestyle change
- Obstacles and solutions
- Food
- Q&A

Methodology Summary

Participating Countries 2020



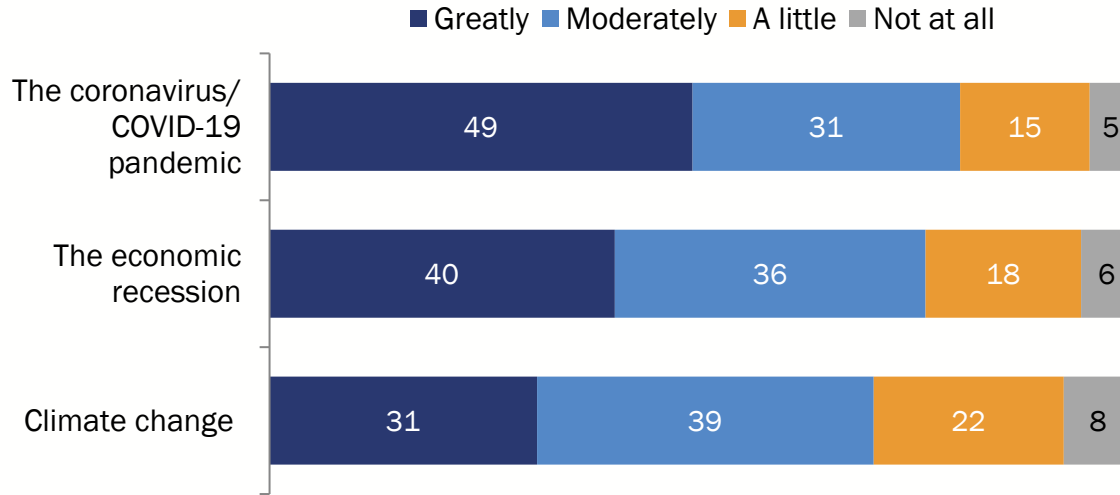
- Representative online samples of approximately 1,000 adults per country in each of 27 countries (n=27,000)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June 2020
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.



Healthy & Sustainable Living in Context

Half of consumers are greatly affected by the COVID-19 pandemic

Extent Personally Affected by Issues, Average of 27 Countries, 2020



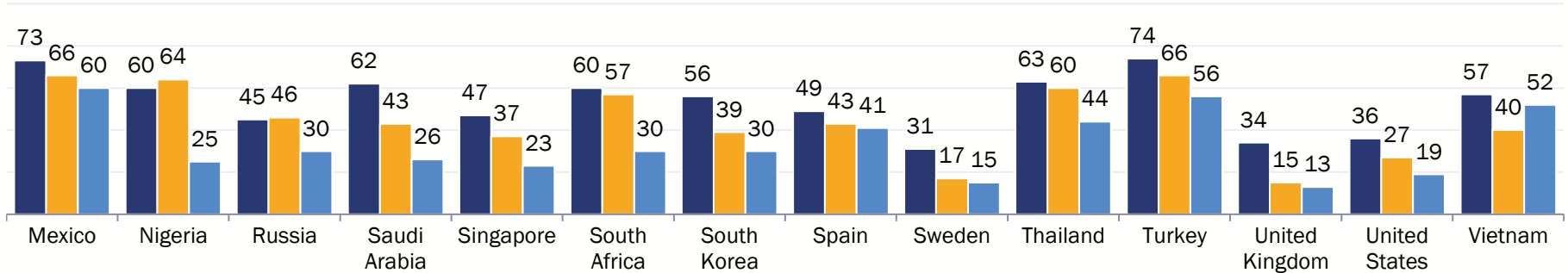
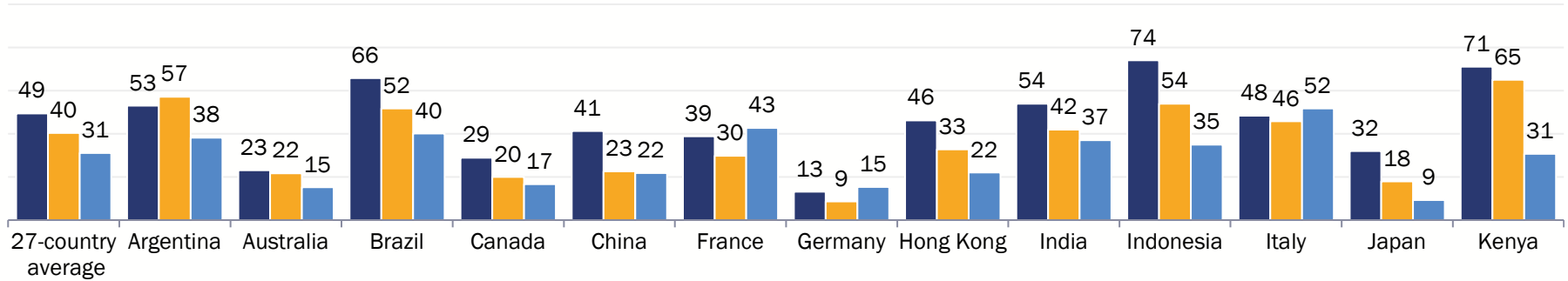
T2. How much are you personally affected by each of the following problems?

Great variability in impacts of challenges across the world

Extent Personally Affected By..., "Greatly," Average of 27 Countries, 2020



■ The coronavirus/COVID-19 pandemic ■ The economic recession ■ Climate change or global warming

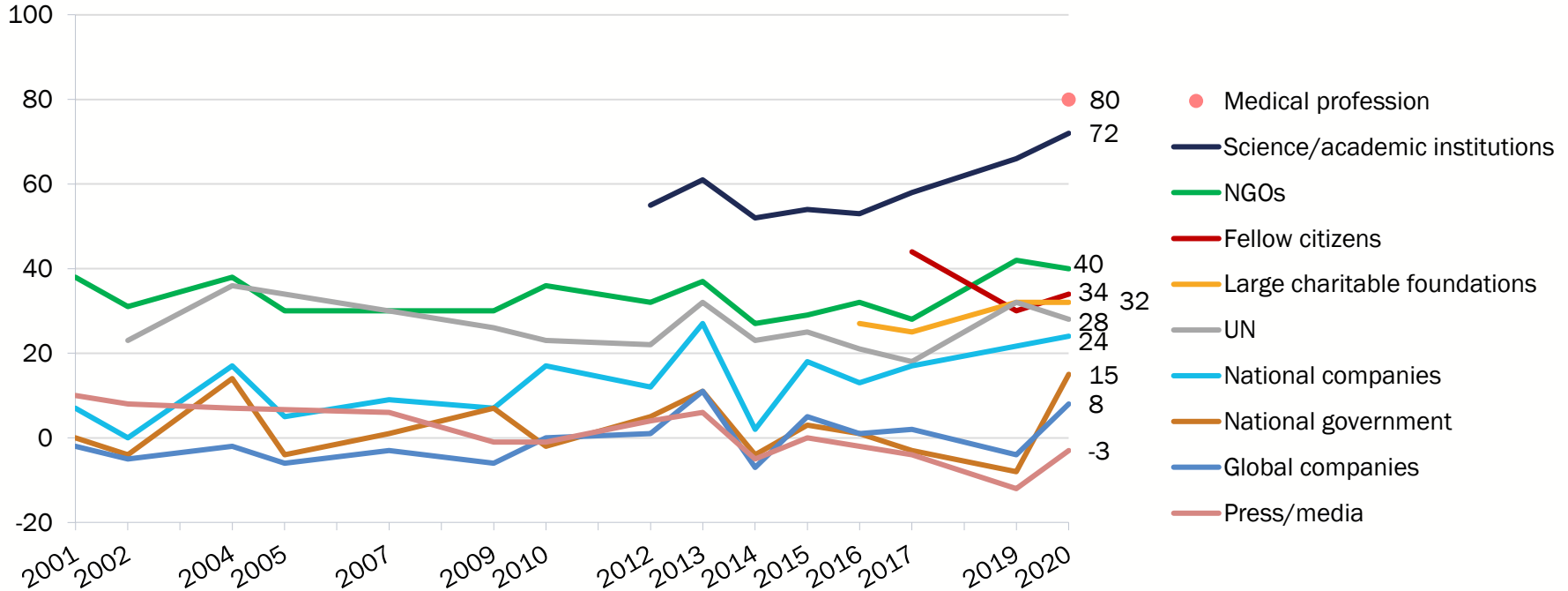


T2. How much are you personally affected by each of the following problems?



Trust in most organizations has increased or remains stable; national governments see the largest improvement over the past year

Trust in Institutions, Net Trust,* Average of 17 Countries,** 2001–2020



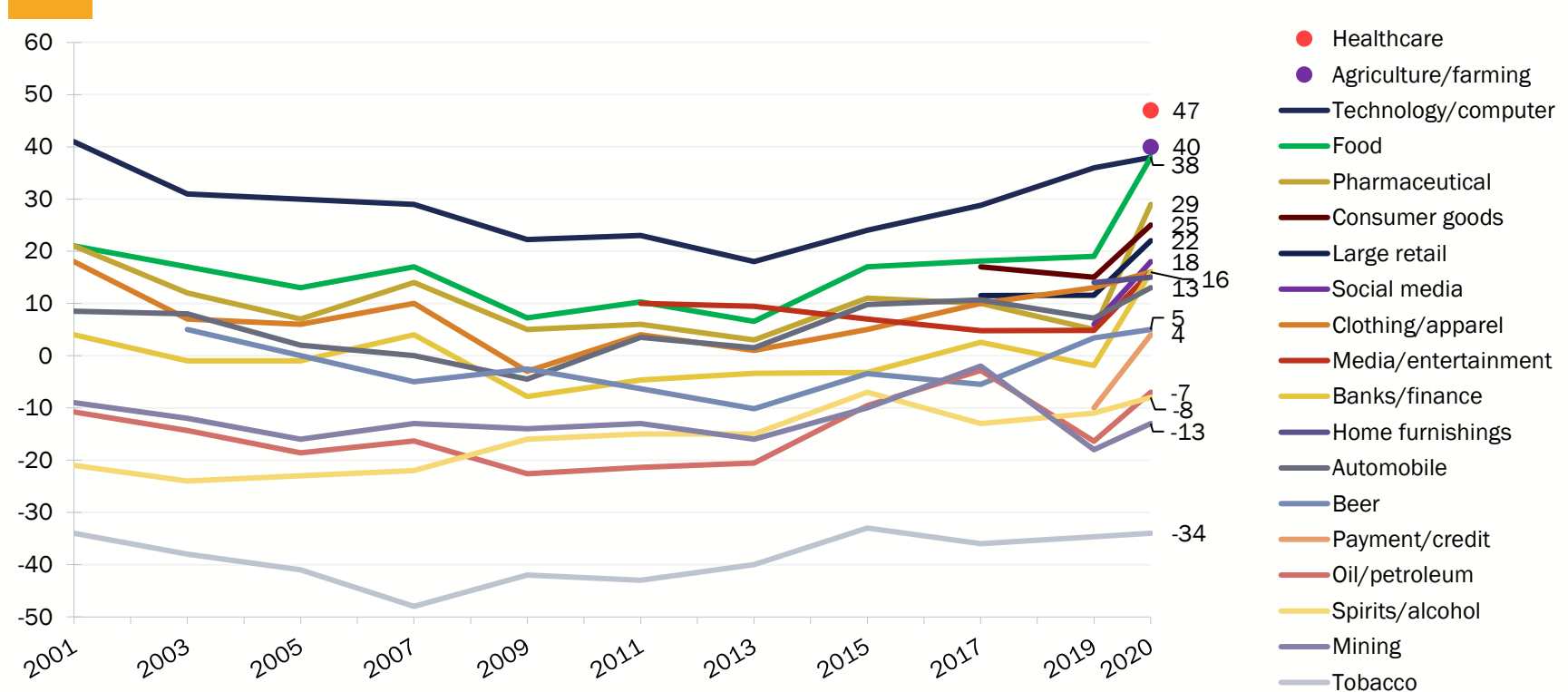
*“A lot of trust” and “Some trust” minus “Not much trust” and “No trust at all”

**Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T3. Please indicate how much you trust each of the following institutions to operate in the best interest of our society. Would you say you have a lot of trust, some trust, not much trust, or no trust at all in...?

Following responses to the COVID-19 pandemic, almost all sectors are viewed more favorably

Performance of Sectors in Fulfilling their Responsibilities to Society, Net Performance,* Average of 18 Countries,** 2001-2020



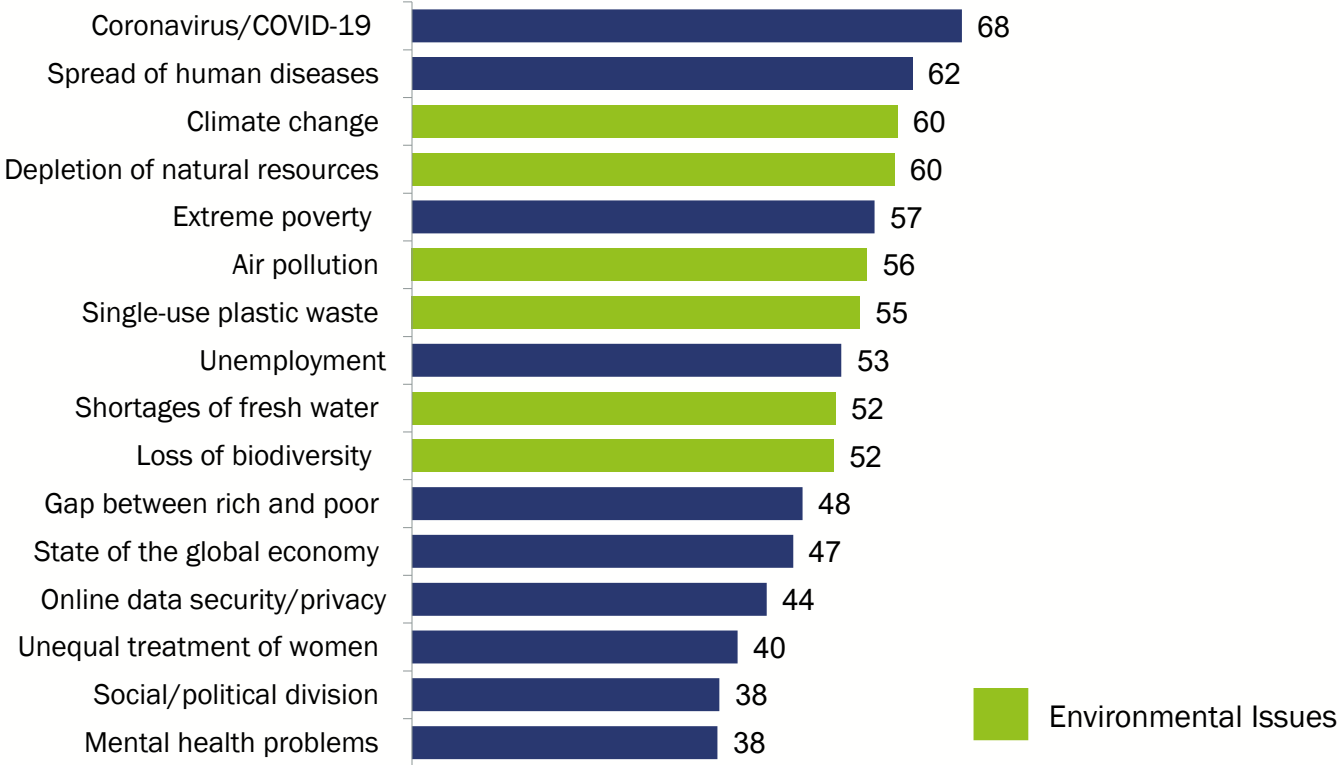
*“Among the very best” and “Above average” minus “Below average” and “Among the very worst”

**Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA (Indonesia and Turkey not included in averages for Beer and Spirits). Not all countries were asked in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T25. Please rate each of the following types of companies on how well they fulfil their responsibilities to society compared to other types of companies...

COVID-19 is this year's most serious global issue for consumers; climate change and natural resource depletion follow closely behind

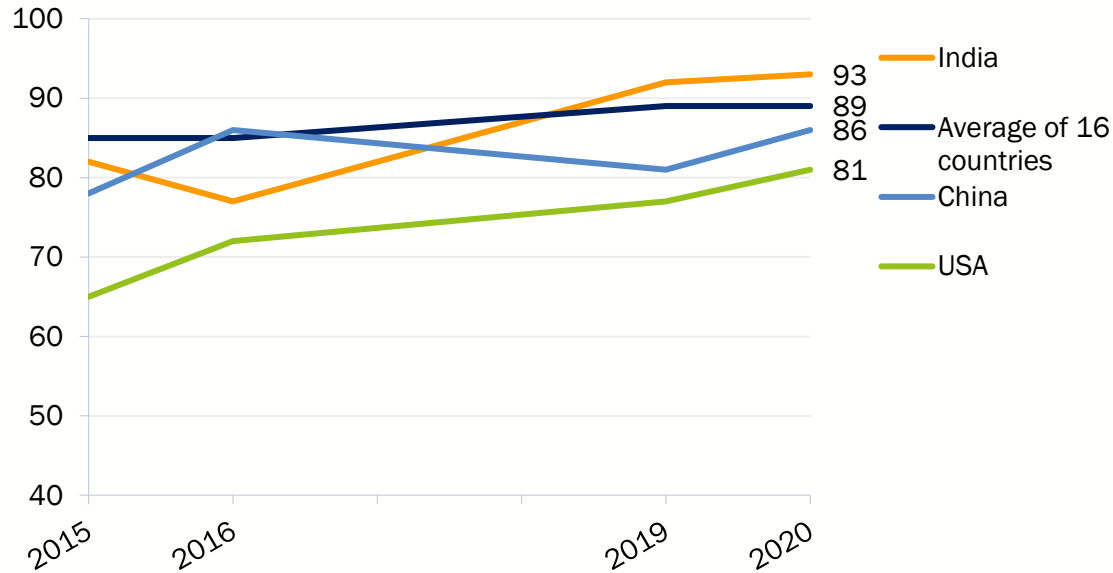
Seriousness of Global Problems, "Very Serious," Average of 27 Countries, 2020



T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Perceived seriousness of climate change is growing in key emitting markets

Seriousness of Climate Change, “Very Serious” and “Somewhat Serious,” Average of 16 Countries* vs China, India, and USA, 2015–2020



*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all countries in all years. Before 2019 this question was asked using an in-person and telephone methodology.

T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.



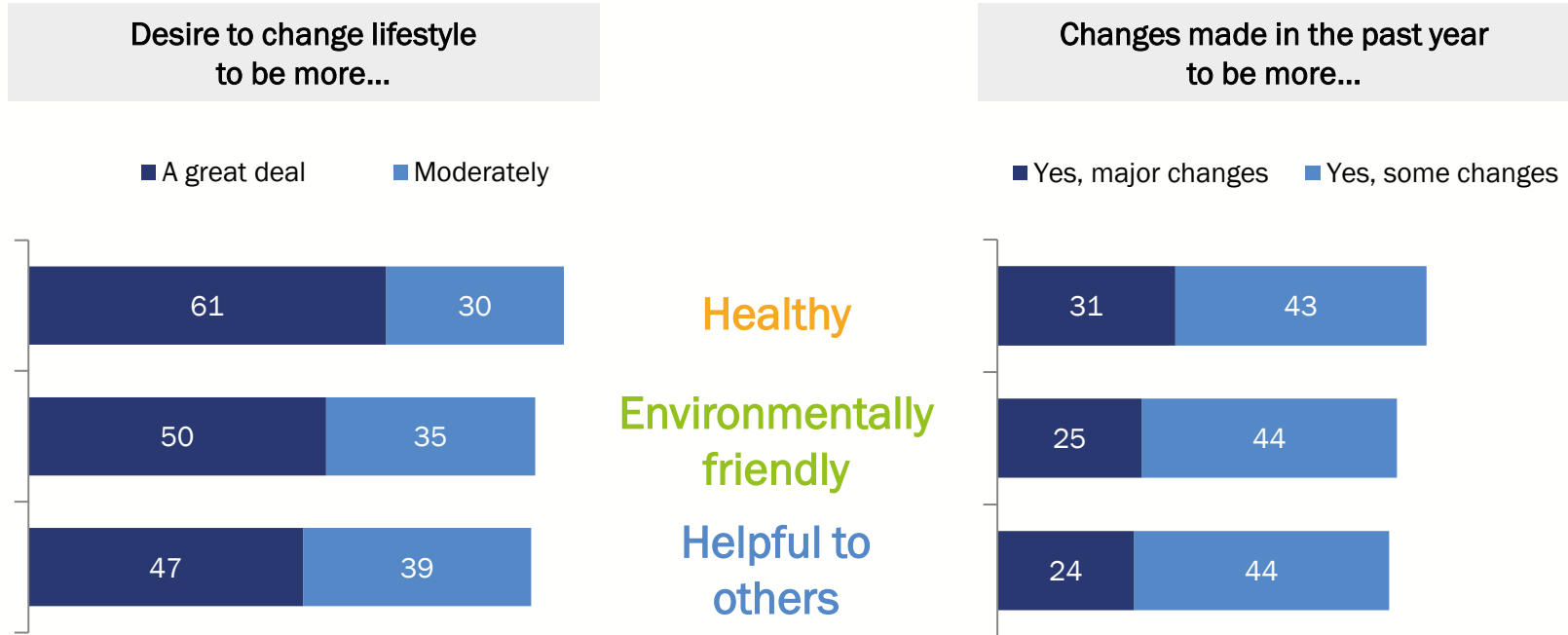
Discussion



Lifestyle Changes

Consumers prioritize a healthy lifestyle but the wide gap between aspiration and action persists

Desire to Change vs Changes Made to Lifestyle, Average of 27 Countries, 2020



Q1. How much would you like to change your lifestyle to be more...? Q2. Have you made any changes to your lifestyle in the past year to be more...?

Health changes are a priority across demographics; younger generations and women most want to change

Desire to Change vs Changes Made to Lifestyle, Average of 27 Countries, by Generation and Gender, 2020



Healthy



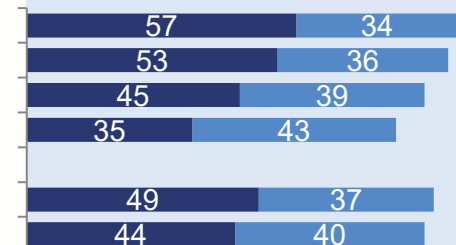
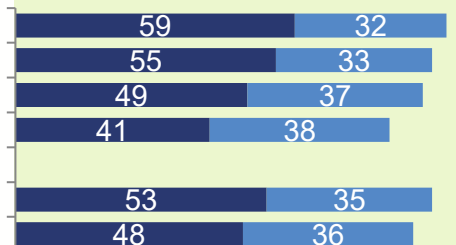
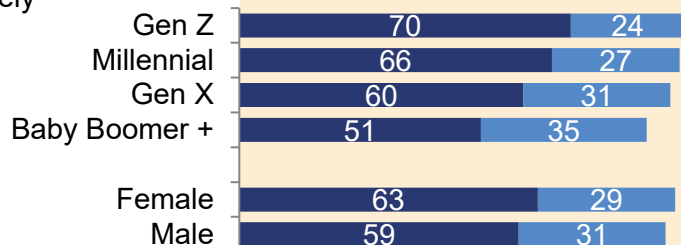
Environmentally friendly



Helpful to others

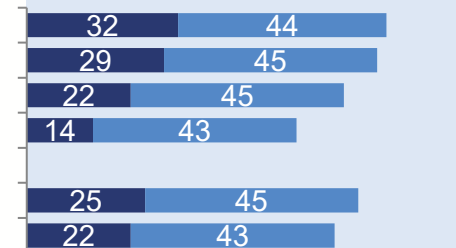
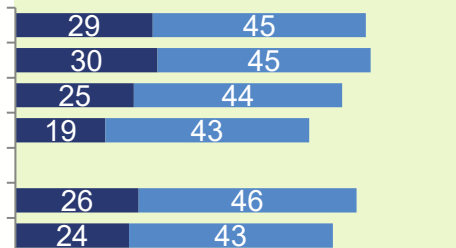
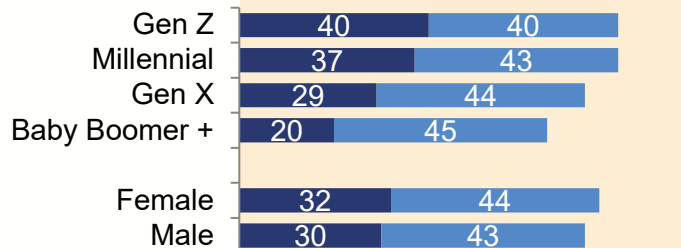
Desire to change lifestyle

- A great deal
- Moderately



Changes made in the past year

- Yes, major changes
- Yes, some changes













Q1. How much would you like to change your lifestyle to be more...? Q2. Have you made any changes to your lifestyle in the past year to be more...?



Behavior Change Index

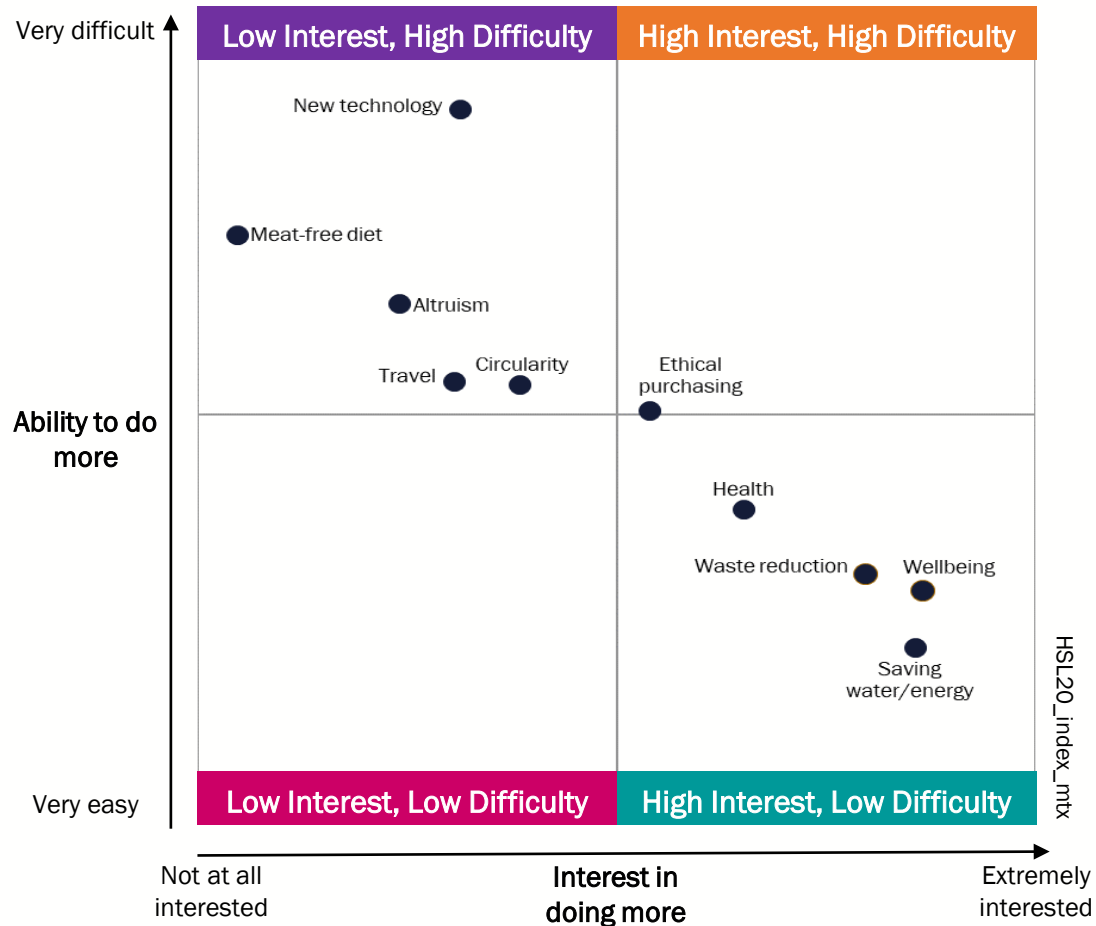
Healthy and Sustainable Behavior Change Index

Index groups shown in order of interest
Average of 27 Countries

-  1 Wellbeing
-  2 Saving water/energy
-  3 Waste reduction
-  4 Health
-  5 Ethical purchasing
-  6 Circularity
-  7 New technology
-  8 Travel
-  9 Altruism
-  10 Meat free diet

Globally, consumers are most interested in making changes they perceive as easy

Desire vs Difficulty to Change Behaviors, Index Scores, Average of 27 Countries, 2020

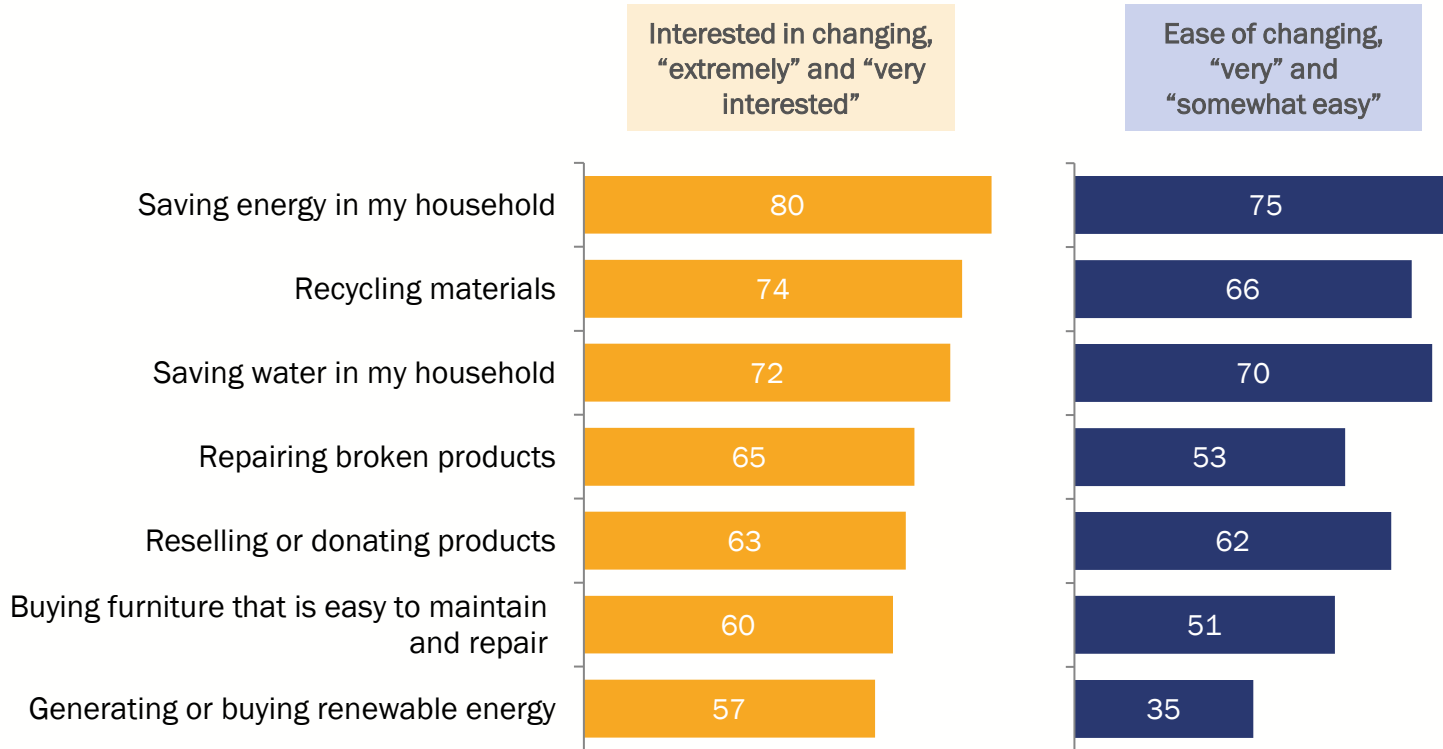


Q9. How interested are you in doing more of each of the following in the coming year?

Q10b. How difficult or easy do you think it would be for you to do more of each of the following?

Saving more energy at home is important for consumers; they are also keen to recycle and save water

Homelife Behaviors, Interest vs Ease of Doing More, Average of 27 Countries, 2020

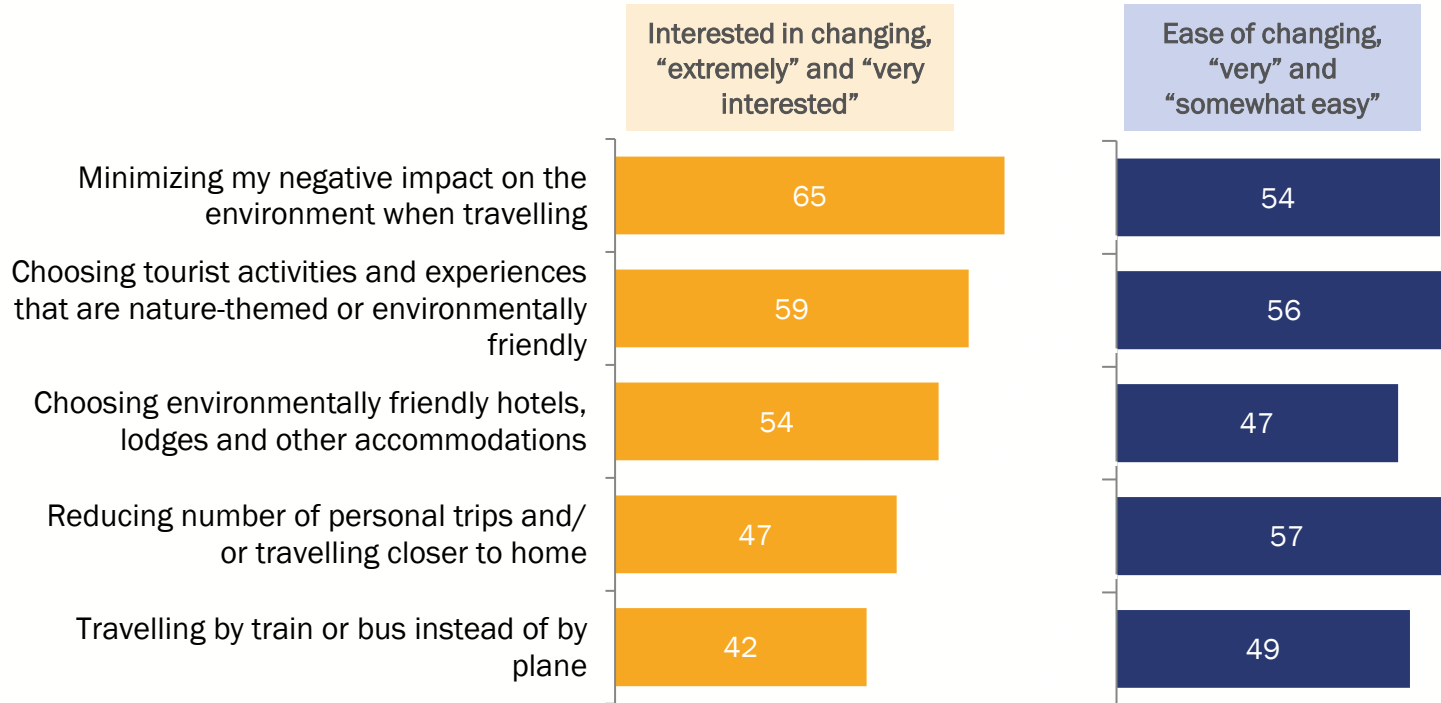


Q9. How interested are you in doing more of each of the following in the coming year?

Q10b. How difficult or easy do you think it would be for you to do more of each of the following?

Consumers are interested in more responsible travelling

Travel Behaviors, Interest vs Ease of Doing More, Average of 27 Countries, 2020



Q9. How interested are you in doing more of each of the following in the coming year?
Q10b. How difficult or easy do you think it would be for you to do more of each of the following?



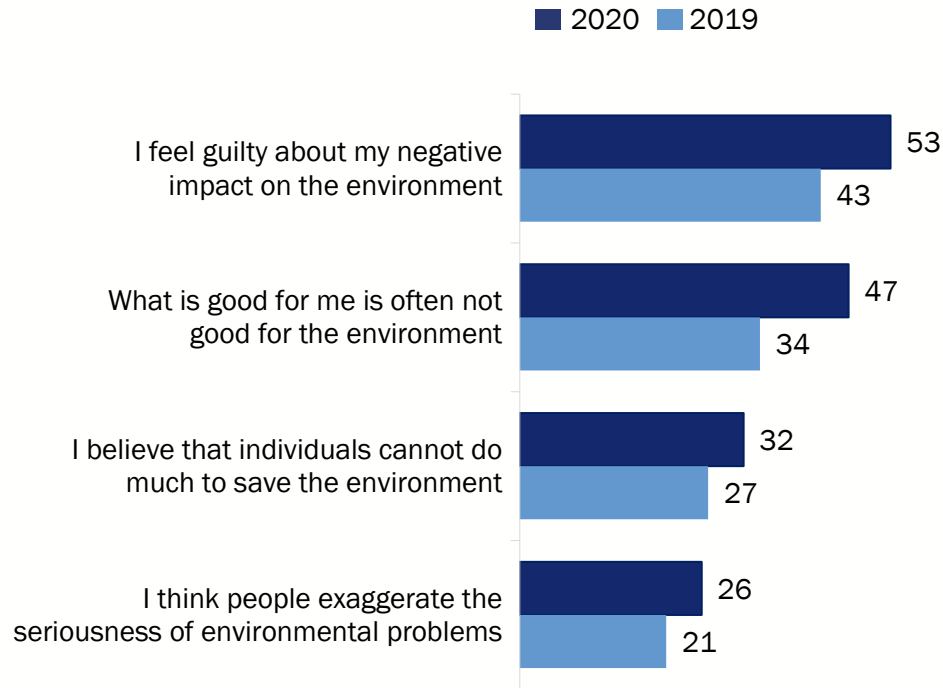
Discussion



Obstacles and Solutions

Growing sense of conflict and disempowerment

Environmental Attitudes, “Strongly Agree” and “Somewhat Agree,” Average of 24 Countries,* 2019–2020

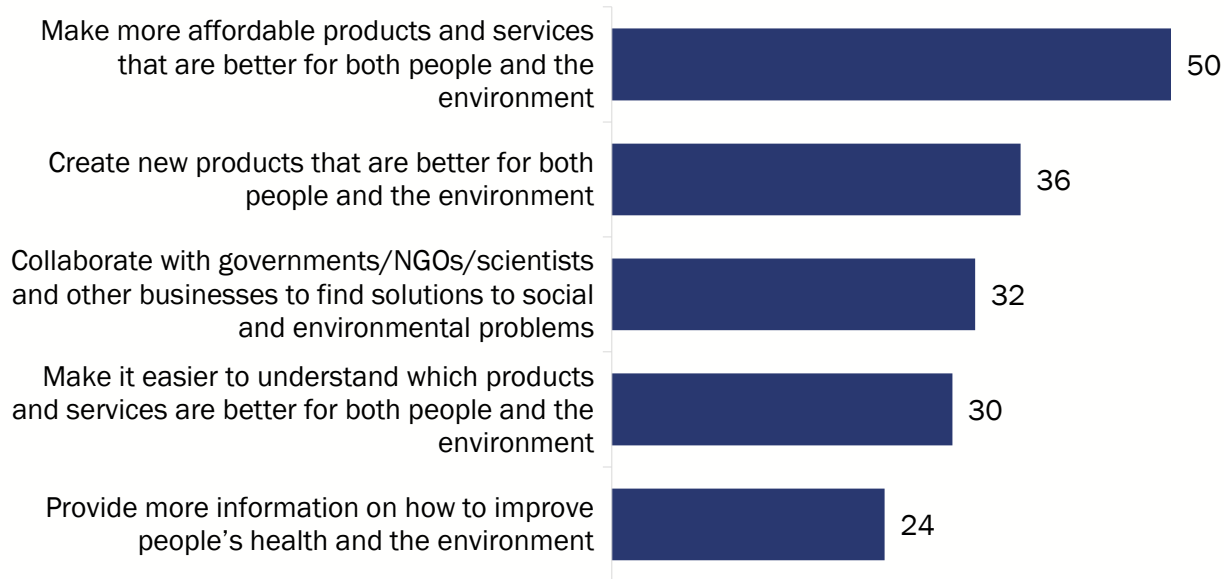


*Does not include Singapore, Thailand, and Vietnam as tracking data unavailable.

Q11. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.

Consumers believe that affordability of responsible products and services is key

Company Actions to Help People and the Environment, Average of 27 Countries, 2020



Q21. What are the best ways for companies to help you live in a way that is better for both people and the environment?
Please select 2 actions from the following list.



Social Influence

Consumers are actively seeking information to improve their lifestyles; family and friends are encouraging them to change

Healthy and Environmentally Friendly Lifestyles, “Very Often” and “Often,” Average of 27 Countries, 2020



Healthy Lifestyle

56% Sought out information related to healthier lifestyles

34% Felt ashamed about living an unhealthy lifestyle

46% Have been encouraged to live a healthier lifestyle by **family or friends**

33% Have been inspired by an **online influencer or celebrity** to live a healthier lifestyle



Environmentally Friendly Lifestyle

47% Sought out information related to environmentally friendly lifestyles

30% Felt ashamed about living a lifestyle that is not environmentally friendly

40% Have been encouraged to live an environmentally friendly lifestyle by **family or friends**

31% Have been inspired by an **online influencer or celebrity** to live an environmentally friendly lifestyle

Q19. Over the past year, please indicate how often you have done or experienced each of the following.

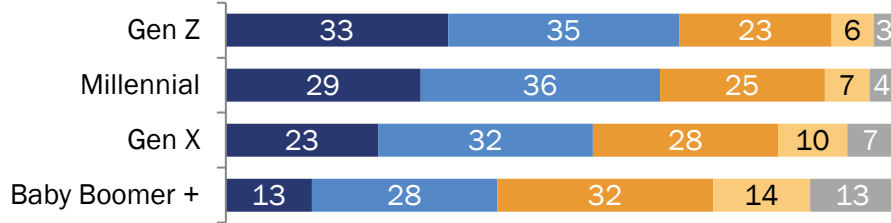
Younger generations are most likely to seek information and to feel ashamed about their current lifestyles

Healthy and Environmentally Friendly Lifestyles, “Very Often” and “Often,” 27 countries

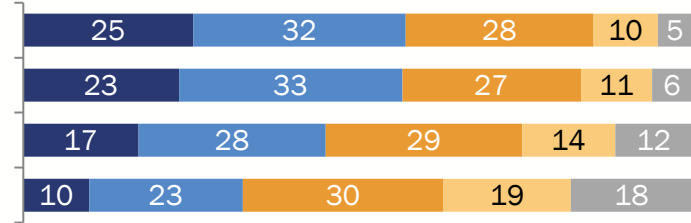
■ Very often ■ Often ■ Sometimes ■ Rarely ■ Never



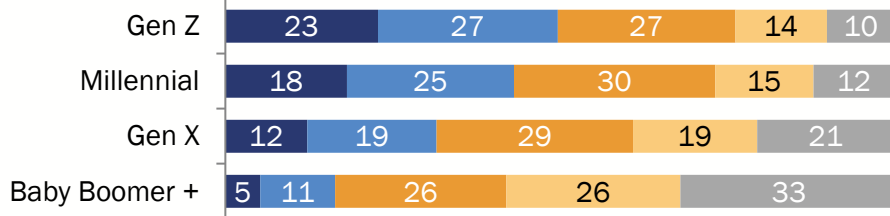
Sought out information related to healthier lifestyles



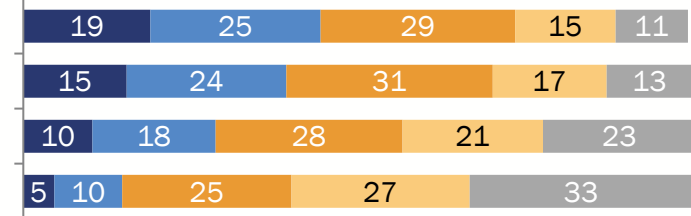
Sought out information related to environmentally friendly lifestyles



Felt ashamed about living an unhealthy lifestyle



Felt ashamed about living a lifestyle that is not environmentally friendly

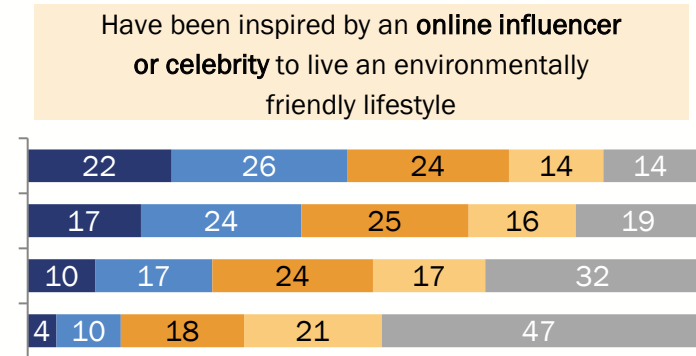
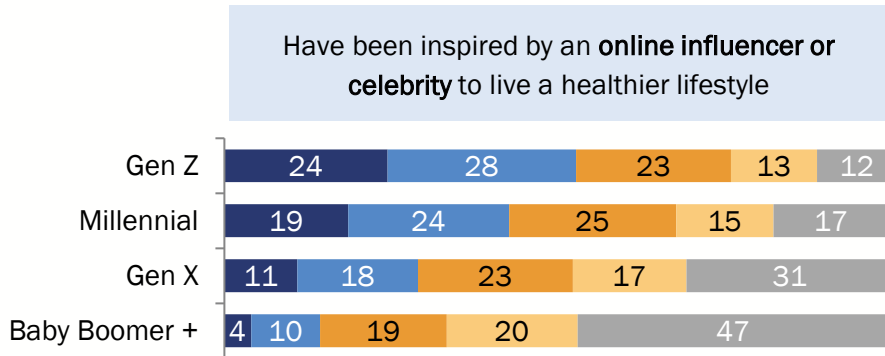
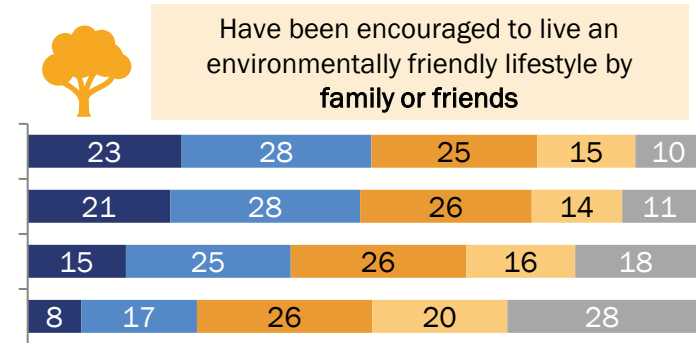
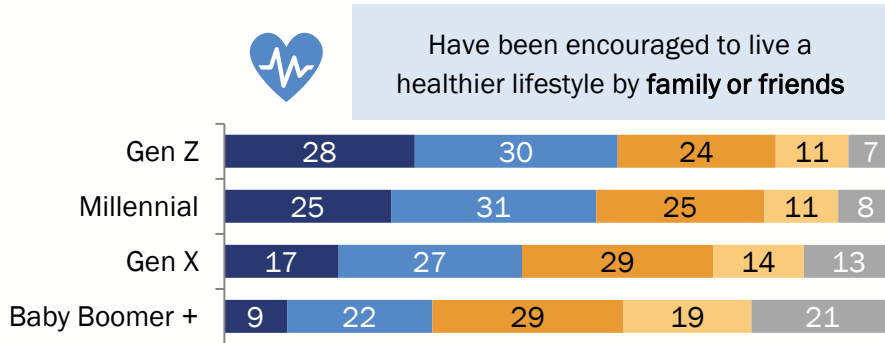


Q19. Over the past year, please indicate how often you have done or experienced each of the following.

Older generations are less likely to be influenced by opinions of others

Healthy and Environmentally Friendly Lifestyles, “Very Often” and “Often,”
Average of 27 Countries, 2020

■ Very often ■ Often ■ Sometimes ■ Rarely ■ Never



Q19. Over the past year, please indicate how often you have done or experienced each of the following.



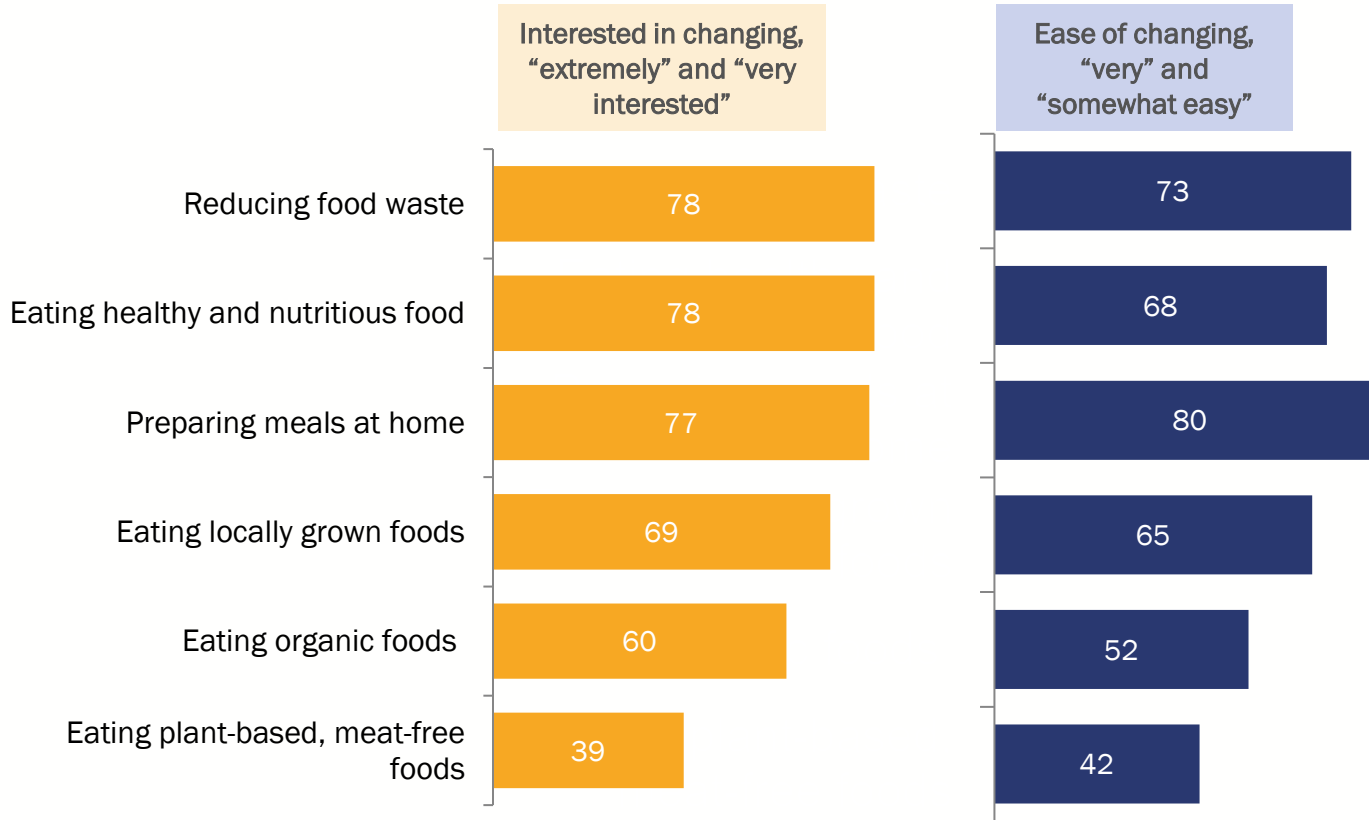
Discussion



Food case study

Consumers express more interest in sustainable food behaviors that seem easier; eating organic and plant-based foods is seen as more difficult

Food Behaviors, Interest vs Ease of Doing More, Average of 27 Countries, 2020



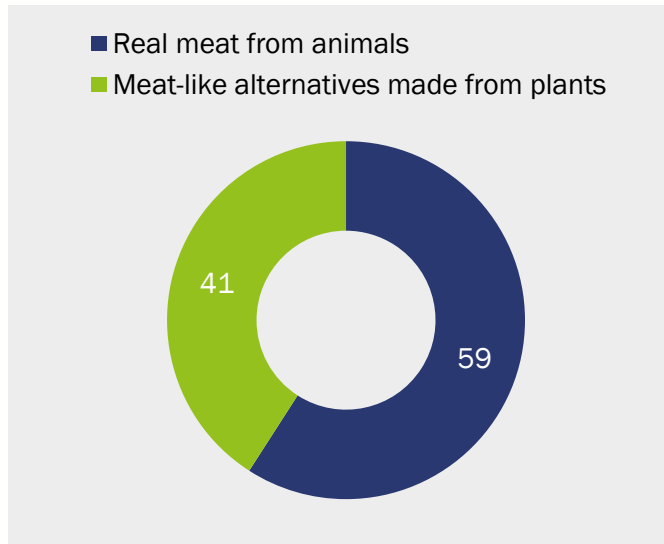
Q9. How interested are you in doing more of each of the following in the coming year?

Q10b. How difficult or easy do you think it would be for you to do more of each of the following?

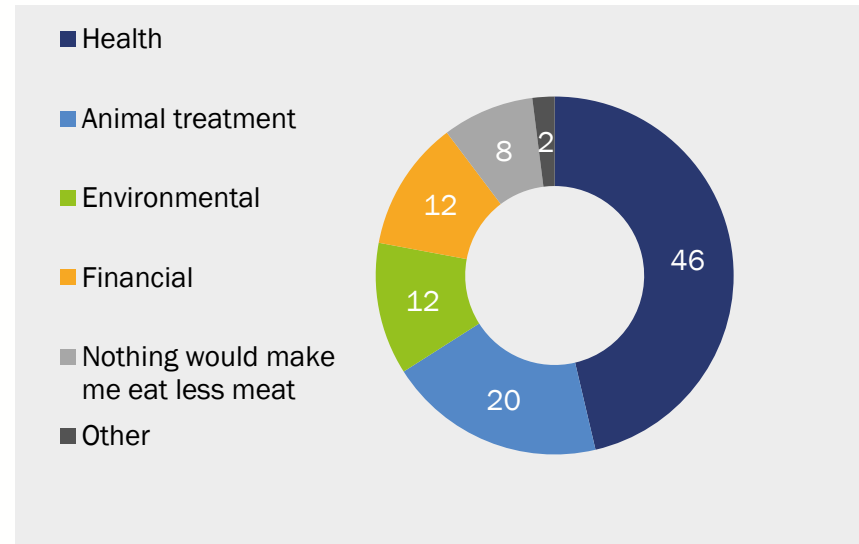
A large minority of meat eaters favor plant-based alternatives; health and animal treatment are the main reasons for potential reduction in meat consumption

Preference for Meat and Reasons to Reduce Meat Consumption, All Who Eat Meat, Average of 27 Countries, 2020

Assuming equal **taste, nutritional value, cost**
Meat eaters prefer...



Most important reasons for meat eaters to **reduce** their consumption...



Q13. Assuming each tasted equally good, had equal nutritional value and cost the same, which one of the following do you prefer?
Q14. What would be the most important reason, if any, for you to reduce the amount of meat you eat?

Hosts



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Thank-you!

GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose.

Established in 1987, GlobeScan has offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto, and is a participant of the UN Global Compact and a Certified B Corporation.

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