Healthy & Sustainable Living
A Global Consumer Insights Project

2020 Highlights
7 October
Introduction
Introductions

Hosts

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GlobeScan

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VISA

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WWF
Agenda

• Method
• Context
• Lifestyle change
• Obstacles and solutions
• Food
• Q&A
Methodology Summary

Participating Markets
2020

- Representative online samples of approximately 1,000 adults per market in each of 27 markets (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 Markets, 2020

T2. How much are you personally affected by each of the following problems?
COVID-19 is this year's most serious global issue for consumers; climate change and natural resource depletion follow closely behind.


Environmental Issues

Coronavirus/COVID-19: 68
Spread of human diseases: 62
Climate change: 60
Depletion of natural resources: 60
Extreme poverty: 57
Air pollution: 56
Single-use plastic waste: 55
Unemployment: 53
Shortages of fresh water: 52
Loss of biodiversity: 52
Gap between rich and poor: 48
State of the global economy: 47
Online data security/privacy: 44
Unequal treatment of women: 40
Social/political division: 38
Mental health problems: 38

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 Markets* 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 markets 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.
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 Markets, ** 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 markets 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 Markets, ** 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 markets 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...
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 Markets, 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 Markets, by Generation and Gender, 2020

<table>
<thead>
<tr>
<th>Desire to change lifestyle</th>
<th>Healthy</th>
<th>Environmentally friendly</th>
<th>Helpful to others</th>
</tr>
</thead>
<tbody>
<tr>
<td>A great deal</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
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<td><img src="chart3.png" alt="Bar chart" /></td>
</tr>
<tr>
<td>Moderately</td>
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<tr>
<td>Gen Z</td>
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<td><img src="chart3.png" alt="Bar chart" /></td>
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<tr>
<td>Millennial</td>
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<td><img src="chart3.png" alt="Bar chart" /></td>
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<tr>
<td>Gen X</td>
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<td><img src="chart3.png" alt="Bar chart" /></td>
</tr>
<tr>
<td>Baby Boomer +</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
<td><img src="chart2.png" alt="Bar chart" /></td>
<td><img src="chart3.png" alt="Bar chart" /></td>
</tr>
<tr>
<td>Female</td>
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<tr>
<td>Male</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
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<td><img src="chart3.png" alt="Bar chart" /></td>
</tr>
</tbody>
</table>

Changes made in the past year

<table>
<thead>
<tr>
<th>Changes made in the past year</th>
<th>Yes, major changes</th>
<th>Yes, some changes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gen Z</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
<td><img src="chart2.png" alt="Bar chart" /></td>
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<tr>
<td>Millennial</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
<td><img src="chart2.png" alt="Bar chart" /></td>
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<tr>
<td>Gen X</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
<td><img src="chart2.png" alt="Bar chart" /></td>
</tr>
<tr>
<td>Baby Boomer +</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
<td><img src="chart2.png" alt="Bar chart" /></td>
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<tr>
<td>Female</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
<td><img src="chart2.png" alt="Bar chart" /></td>
</tr>
<tr>
<td>Male</td>
<td><img src="chart1.png" alt="Bar chart" /></td>
<td><img src="chart2.png" alt="Bar chart" /></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Index Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Wellbeing</td>
</tr>
<tr>
<td>2</td>
<td>Saving water/energy</td>
</tr>
<tr>
<td>3</td>
<td>Waste reduction</td>
</tr>
<tr>
<td>4</td>
<td>Health</td>
</tr>
<tr>
<td>5</td>
<td>Ethical purchasing</td>
</tr>
<tr>
<td>6</td>
<td>Circularity</td>
</tr>
<tr>
<td>7</td>
<td>New technology</td>
</tr>
<tr>
<td>8</td>
<td>Travel</td>
</tr>
<tr>
<td>9</td>
<td>Altruism</td>
</tr>
<tr>
<td>10</td>
<td>Meat free diet</td>
</tr>
</tbody>
</table>

Index groups shown in order of interest
Average of 27 Markets
Globally, consumers are most interested in making changes they perceive as easy

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

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

- What is good for me is often not good for the environment: 2019 - 34%, 2020 - 47%
- I believe that individuals cannot do much to save the environment: 2019 - 27%, 2020 - 32%
- I think people exaggerate the seriousness of environmental problems: 2019 - 21%, 2020 - 26%

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

- Make more affordable products and services that are better for both people and the environment (50)
- Create new products that are better for both people and the environment (36)
- Collaborate with governments/NGOs/scientists and other businesses to find solutions to social and environmental problems (32)
- Make it easier to understand which products and services are better for both people and the environment (30)
- Provide more information on how to improve people’s health and the environment (24)
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 Markets, 2020

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

**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
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,” Average of 27 Markets, 2020

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

- [Q19a] Sought out information related to healthier lifestyles
  - Gen Z: 33 (Very often), 35 (Often), 23 (Sometimes), 6 (Rarely), 3 (Never)
  - Millennial: 29 (Very often), 36 (Often), 25 (Sometimes), 7 (Rarely), 4 (Never)
  - Gen X: 23 (Very often), 32 (Often), 28 (Sometimes), 10 (Rarely), 7 (Never)
  - Baby Boomer +: 13 (Very often), 28 (Often), 32 (Sometimes), 14 (Rarely), 13 (Never)

- [Q19b] Sought out information related to environmentally friendly lifestyles
  - Gen Z: 25 (Very often), 32 (Often), 28 (Sometimes), 10 (Rarely), 5 (Never)
  - Millennial: 23 (Very often), 33 (Often), 27 (Sometimes), 11 (Rarely), 6 (Never)
  - Gen X: 17 (Very often), 28 (Often), 29 (Sometimes), 14 (Rarely), 12 (Never)
  - Baby Boomer +: 10 (Very often), 23 (Often), 30 (Sometimes), 19 (Rarely), 18 (Never)

- [Q19c] Felt ashamed about living an unhealthy lifestyle
  - Gen Z: 23 (Very often), 27 (Often), 27 (Sometimes), 14 (Rarely), 10 (Never)
  - Millennial: 18 (Very often), 25 (Often), 30 (Sometimes), 15 (Rarely), 12 (Never)
  - Gen X: 12 (Very often), 19 (Often), 29 (Sometimes), 19 (Rarely), 21 (Never)
  - Baby Boomer +: 5 (Very often), 11 (Often), 26 (Sometimes), 33 (Rarely), 1 (Never)

- [Q19d] Felt ashamed about living a lifestyle that is not environmentally friendly
  - Gen Z: 19 (Very often), 25 (Often), 29 (Sometimes), 15 (Rarely), 11 (Never)
  - Millennial: 15 (Very often), 24 (Often), 31 (Sometimes), 17 (Rarely), 13 (Never)
  - Gen X: 10 (Very often), 18 (Often), 28 (Sometimes), 21 (Rarely), 23 (Never)
  - Baby Boomer +: 5 (Very often), 10 (Often), 25 (Sometimes), 27 (Rarely), 33 (Never)
Older generations are less likely to be influenced by opinions of others. Healthy and Environmentally Friendly Lifestyles, “Very Often” and “Often,” Average of 27 Markets, 2020

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

<table>
<thead>
<tr>
<th>Generation</th>
<th>Have been encouraged to live a healthier lifestyle by family or friends</th>
<th>Have been encouraged to live an environmentally friendly lifestyle by family or friends</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very often</td>
<td>Often</td>
</tr>
<tr>
<td>Gen Z</td>
<td>28</td>
<td>30</td>
</tr>
<tr>
<td>Millennial</td>
<td>25</td>
<td>31</td>
</tr>
<tr>
<td>Gen X</td>
<td>17</td>
<td>27</td>
</tr>
<tr>
<td>Baby Boomer +</td>
<td>9</td>
<td>22</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Generation</th>
<th>Have been inspired by an online influencer or celebrity to live a healthier lifestyle</th>
<th>Have been inspired by an online influencer or celebrity to live an environmentally friendly lifestyle</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Very often</td>
<td>Often</td>
</tr>
<tr>
<td>Gen Z</td>
<td>24</td>
<td>28</td>
</tr>
<tr>
<td>Millennial</td>
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<td>Gen X</td>
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<td>18</td>
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<tr>
<td>Baby Boomer +</td>
<td>4</td>
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</tbody>
</table>
Discussion
Food case study
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 Markets, 2020

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?
Q&A

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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.

www.globescan.com

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eric.whan@globescan.com
Taste, price, and health are determinants for food/drinks purchase choices; environmental impacts are less likely to be priorities but are still important

Food and Drink Purchase Considerations, “Always” and “Often,” Average of 27 Markets, 2020

Q17. Thinking of the foods and drinks that you choose and how they are produced, distributed and sold, please indicate how often you consider each of the following in your choices.
GlobeScan created a second consumer segmentation to describe consumers and their considerations when purchasing food and drink. This was created to help understand and target consumer needs and preferences.

<table>
<thead>
<tr>
<th>Country</th>
<th>Environment</th>
<th>Health</th>
<th>Price and Taste</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
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<td>China</td>
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<tr>
<td>Russia</td>
<td>20</td>
<td>48</td>
<td>31</td>
</tr>
</tbody>
</table>
The largest segment in each market varies
Largest Purchase Consideration Segment, by Market, 2020

Purchase Consideration Segmentation
2020