Healthy & Sustainable Living

A Global Consumer Insights Project

2020 Highlights

7 October

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evidence and ideas. applied

Introduction

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Global Consumer Insights

CVS Health IKEA PEPSICO VISA WWF GLOBESCAN

Introductions

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A Global Consumer Insights Project

Hosts

Chris Coulter
Chief Executive Officer
GlobeScan

Eric Whan
Senior Director
GlobeScan

Special Guests

Kajsa-Stina Kalin
Healthy & Sustainable Living Leader
Inter IKEA Group

Douglas Sabo
Chief Sustainability Officer
VISA

Cristianne Close
Global Practice Leader, Markets
WWF

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Agenda

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

Methodology Summary

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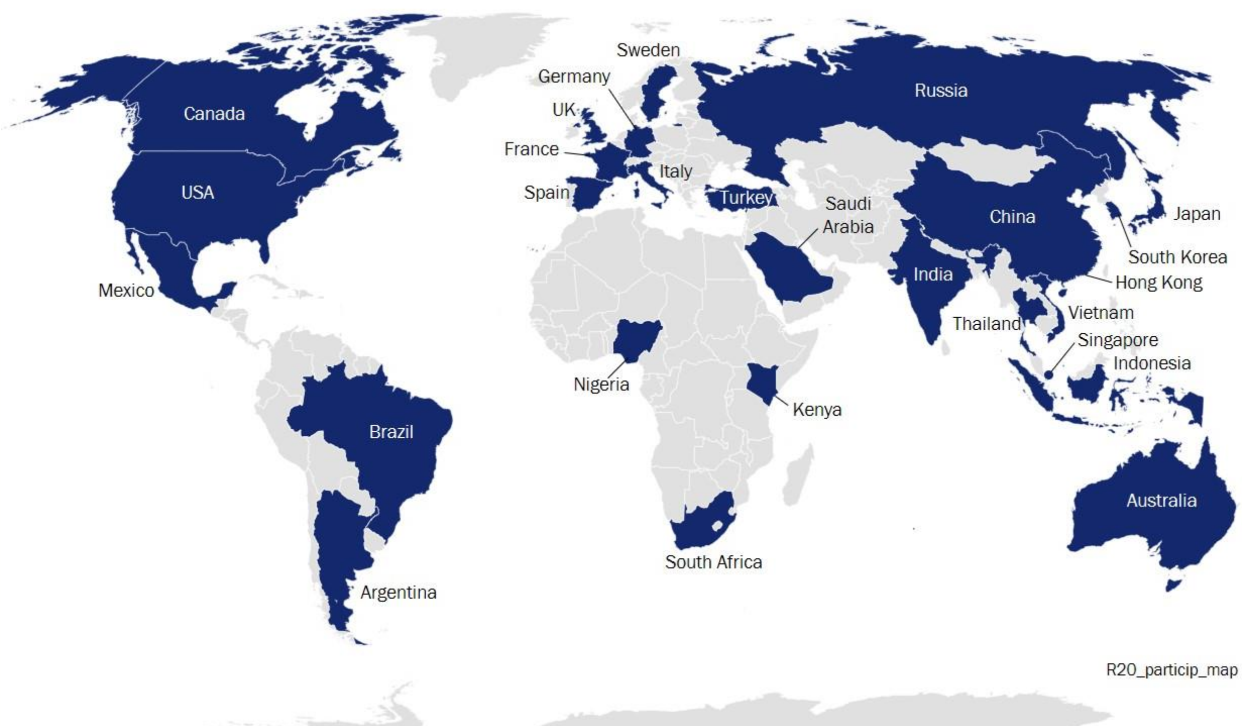
Participating Markets
2020



- 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.

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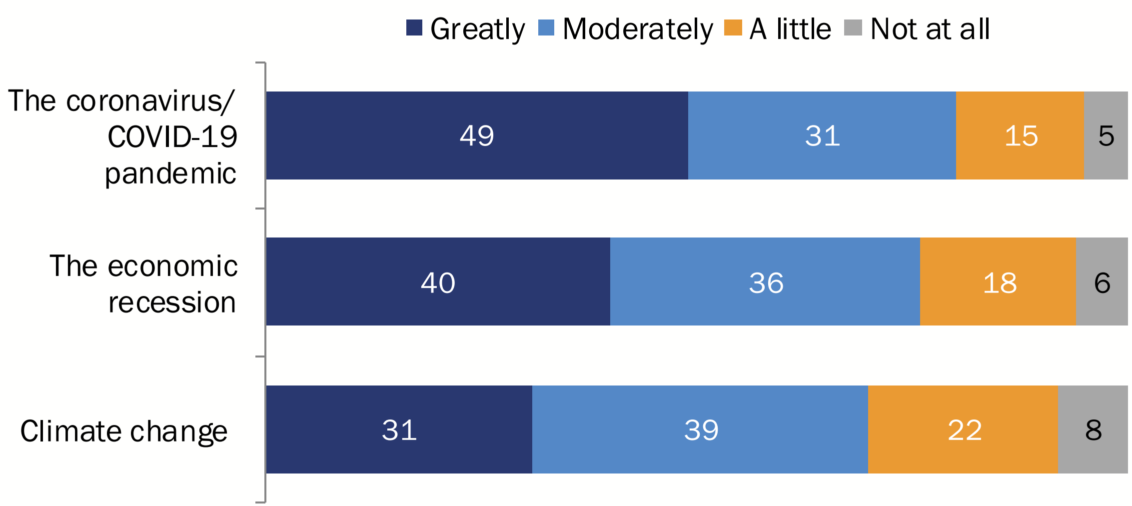
Healthy & Sustainable Living in Context

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

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

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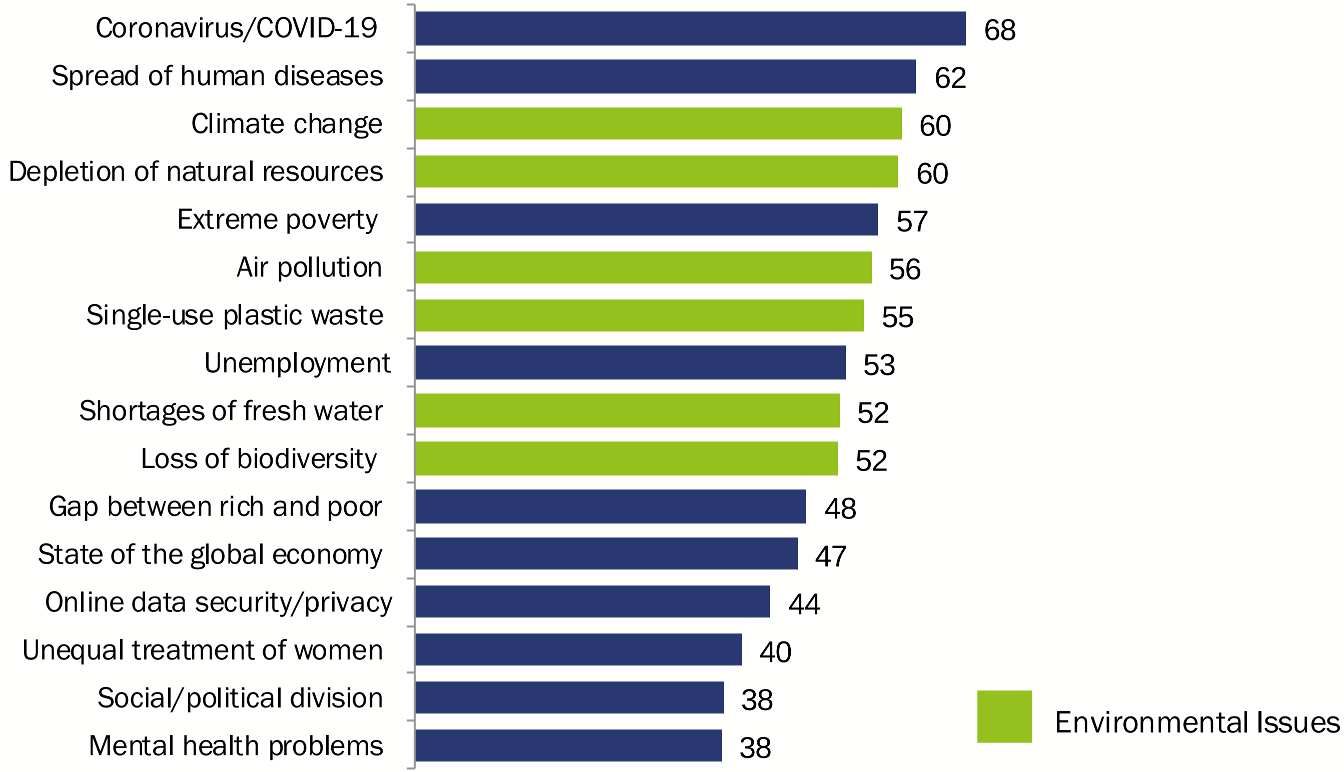

T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

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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

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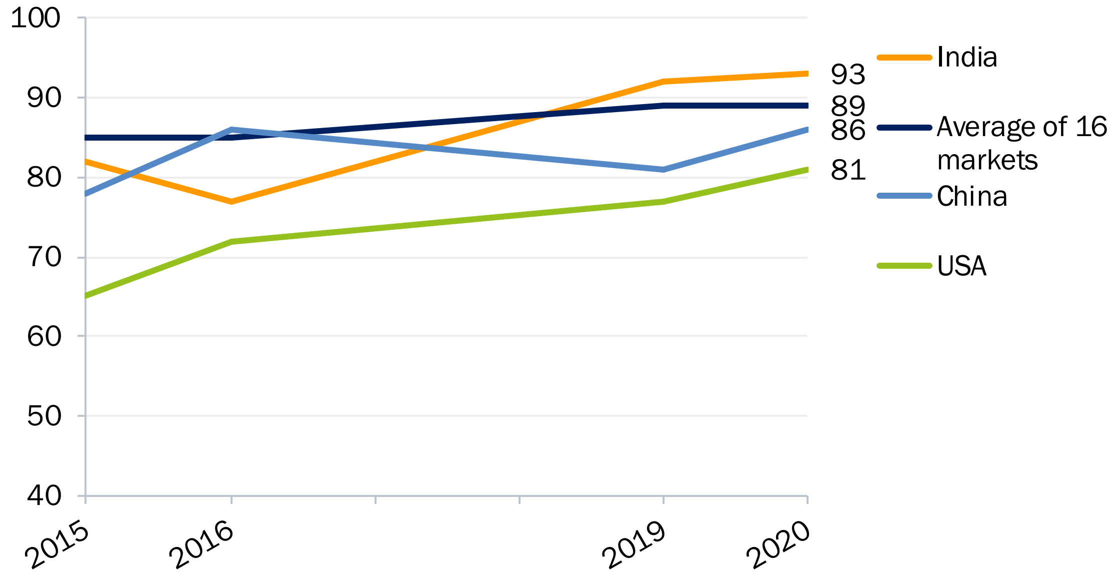

*Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, Spain, Turkey, UK, and USA
Not asked in all markets in all years. Before 2019 this question was asked using an in-person and telephone methodology.

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.

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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

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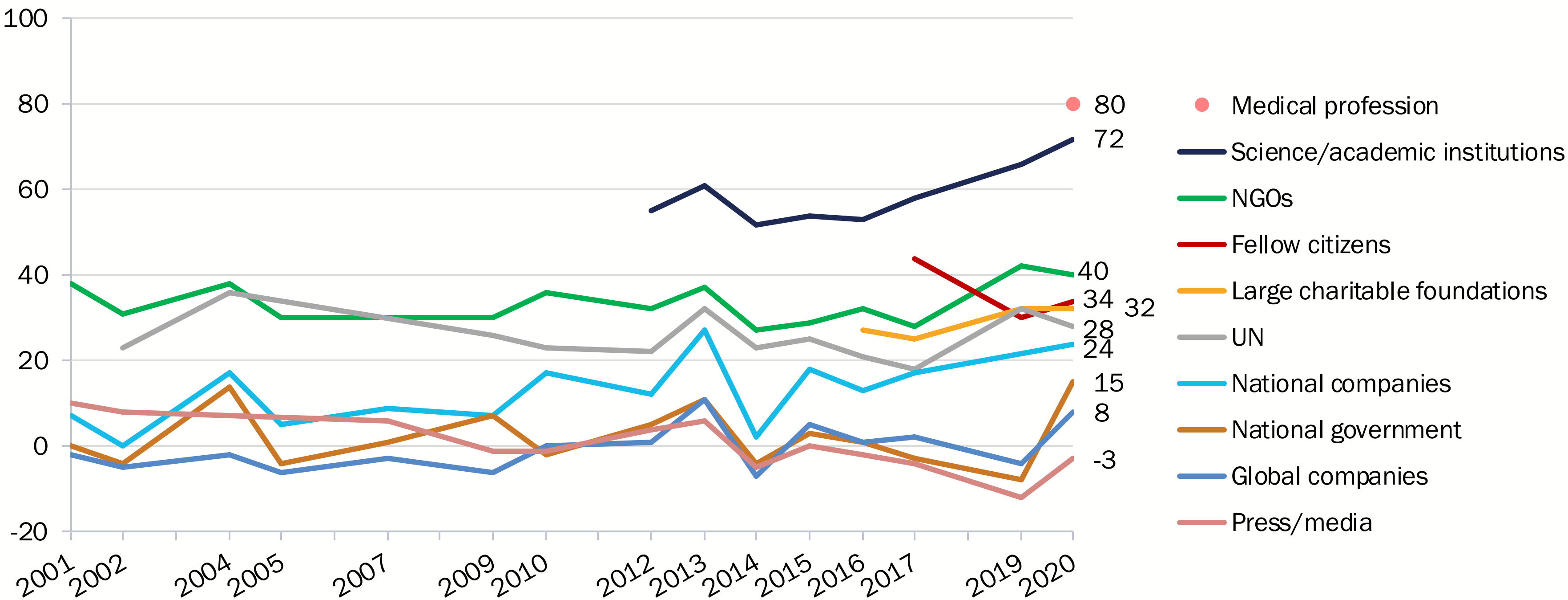

*"A lot of trust" and "Some trust" minus "Not much trust" and "No trust at all"
**Includes Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA. Not all markets were asked in all years. Before 2019 this question was 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…?

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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

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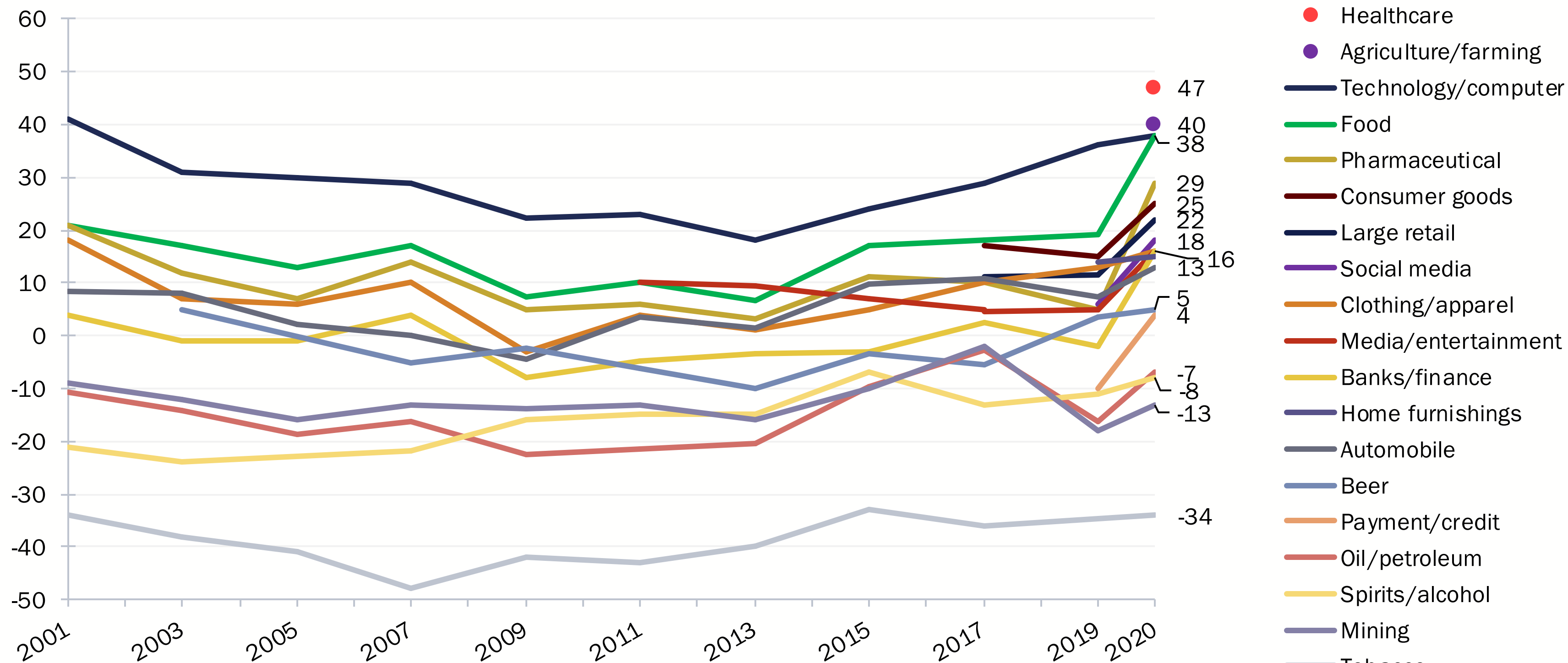

*"Among the very best" and "Above average" minus "Below average" and "Among the very worst"
**Includes Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Kenya, Mexico, Nigeria, Russia, South Korea, Spain, Turkey, UK, and USA (Indonesia and Turkey not included in averages 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…

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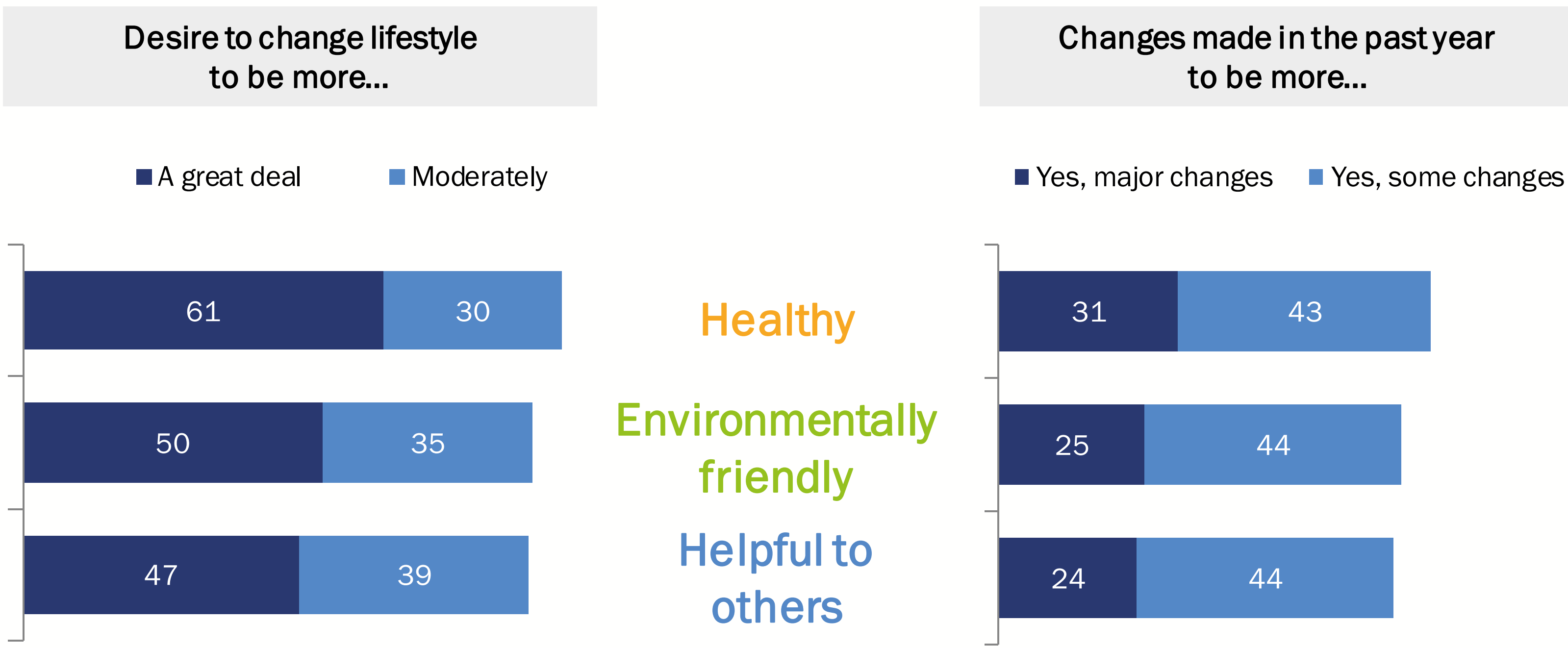
Discussion

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

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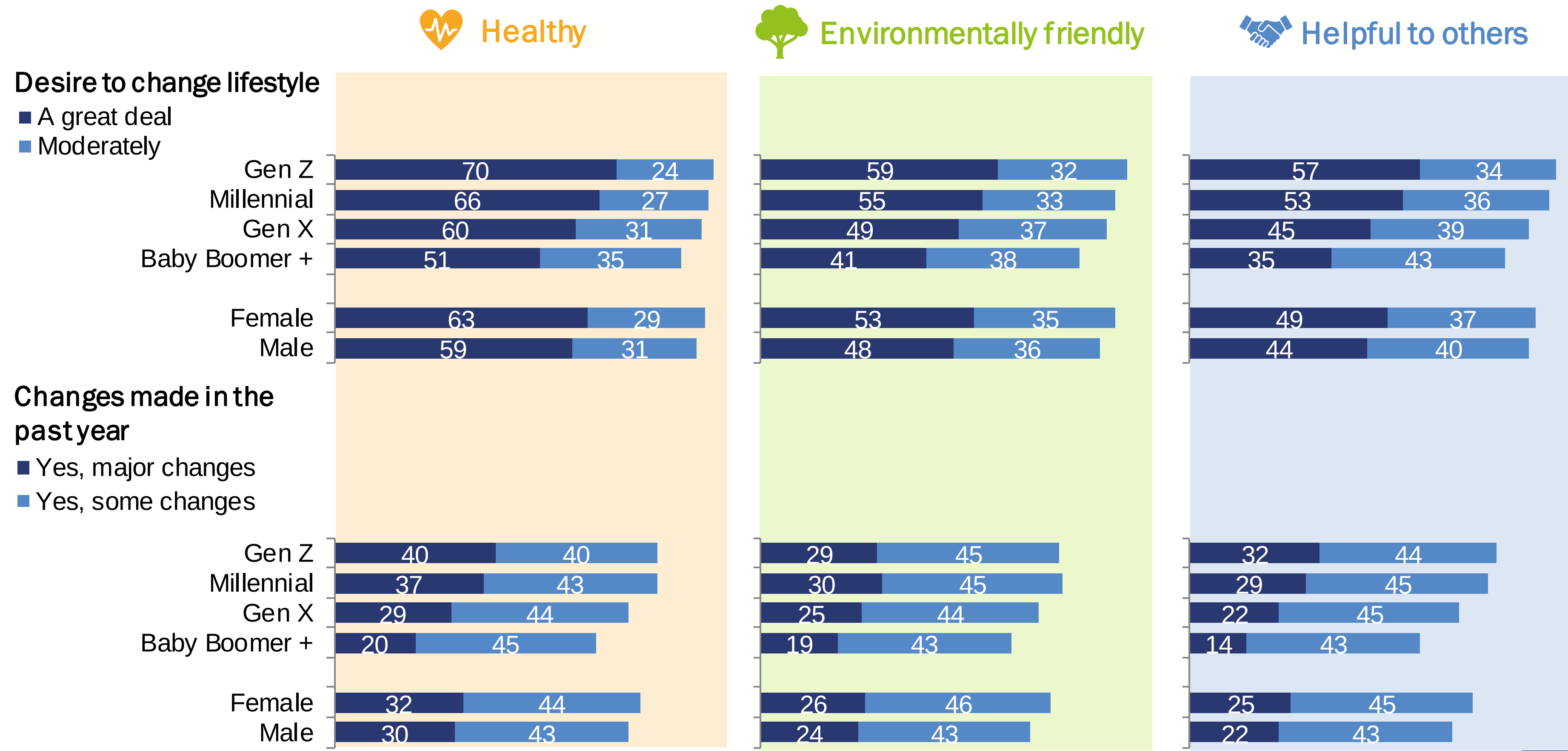

Q1. How much would you like to change your lifestyle to be more…? Q2. Have you made any changes to your lifestyle in the past year to be more…?

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Behavior Change Index

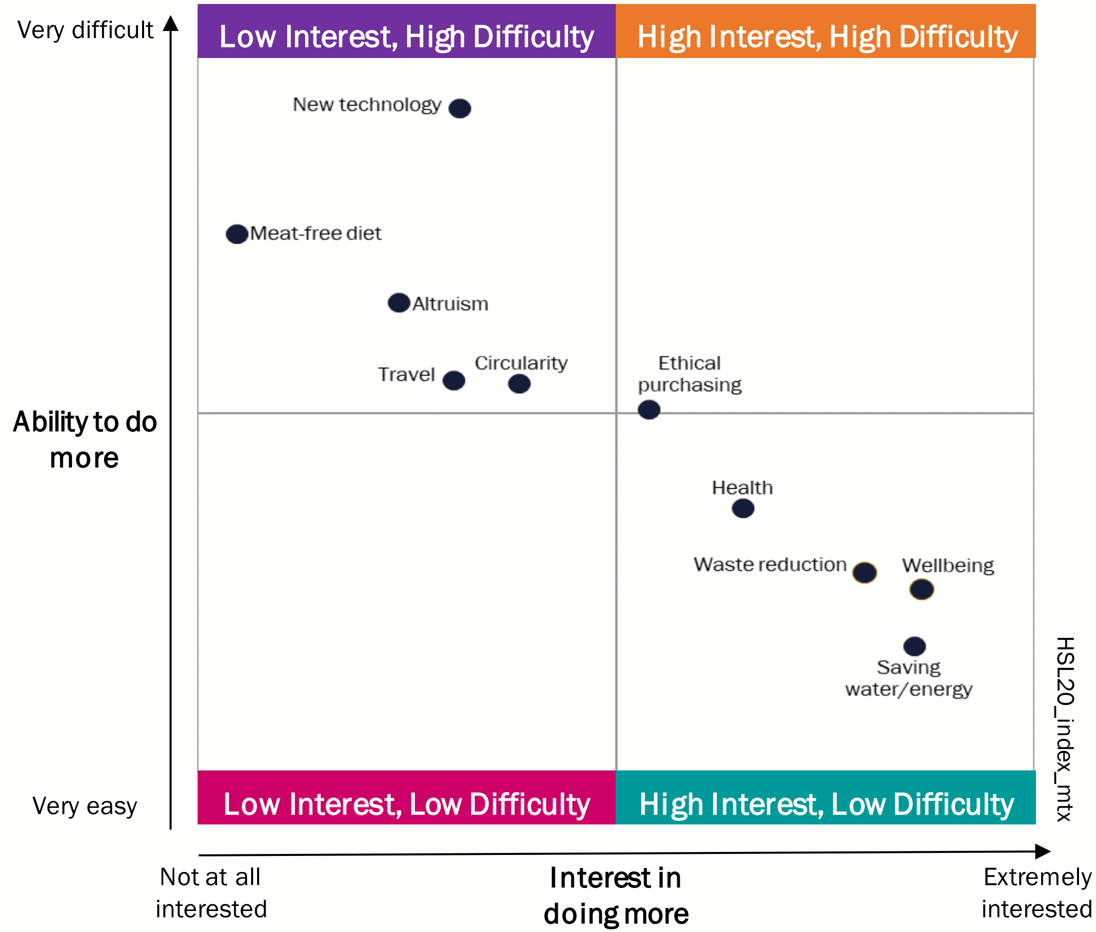
Healthy and Sustainable Behavior Change Index

Index groups shown in order of interest
Average of 27 Markets

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 Markets, 2020



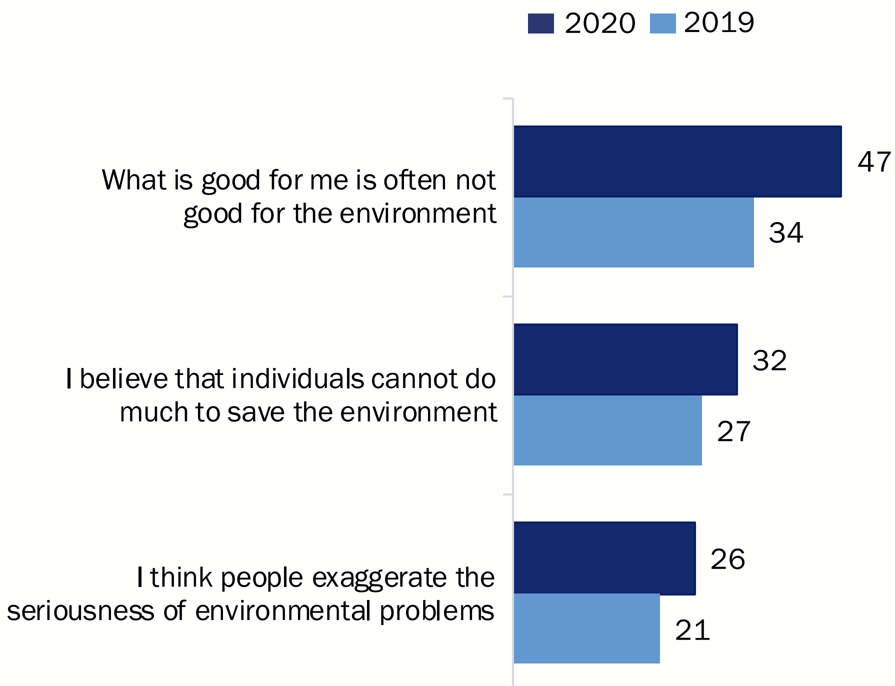
Q9. How interested are you in doing more of each of the following in the coming year?
Q10b. How difficult or easy do you think it would it be for you to do more of each of the following?

Discussion

Obstacles and Solutions

Growing sense of conflict and disempowerment

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

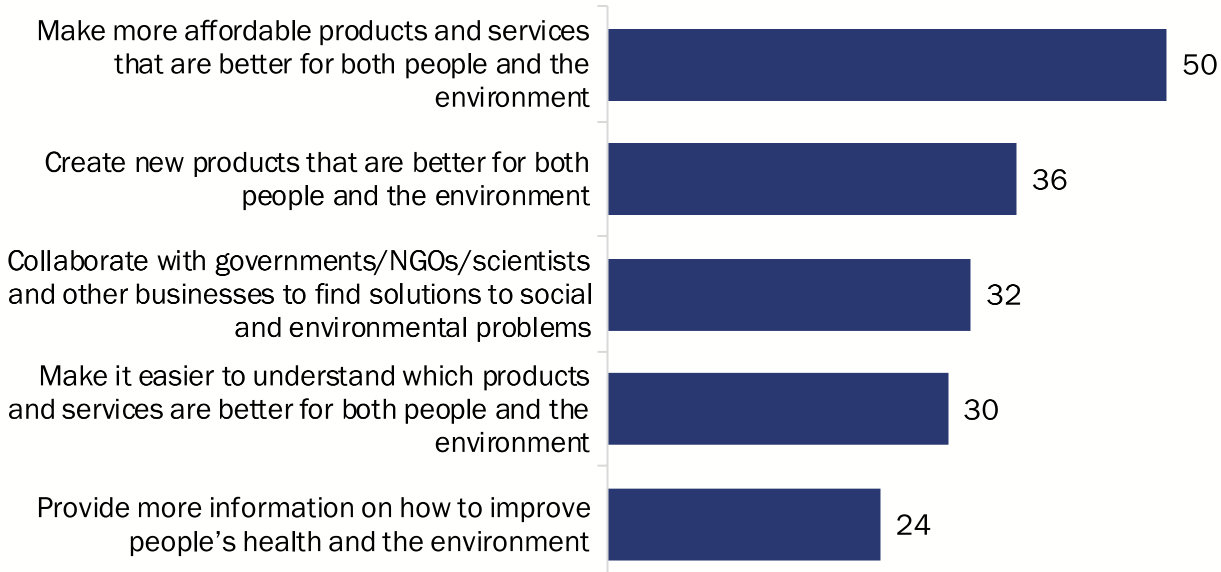


*Does not include Singapore, Thailand, and Vietnam as tracking data unavailable.

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 Markets, 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

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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

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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,” Average of 27 Markets, 2020

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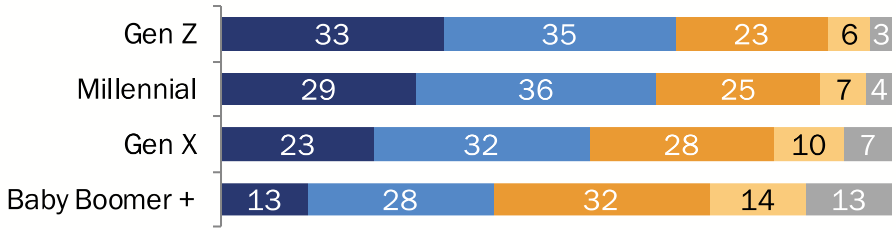
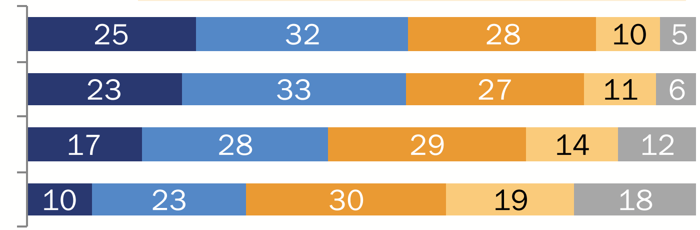
Very often | Often | Sometimes | Rarely | Never

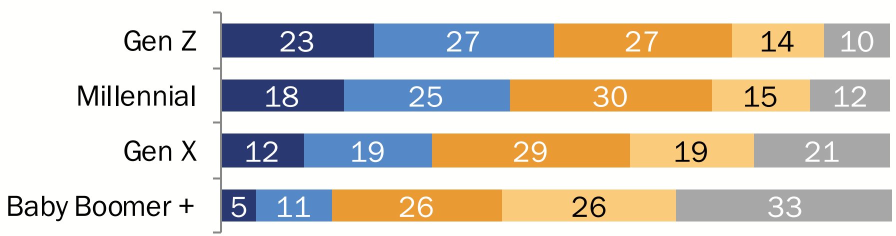
Sought out information related to healthier lifestyles



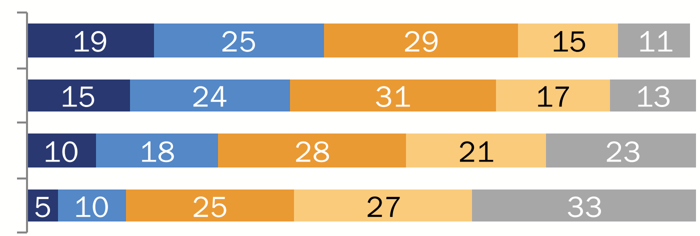
Sought out information related to environmentally friendly lifestyles



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.

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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

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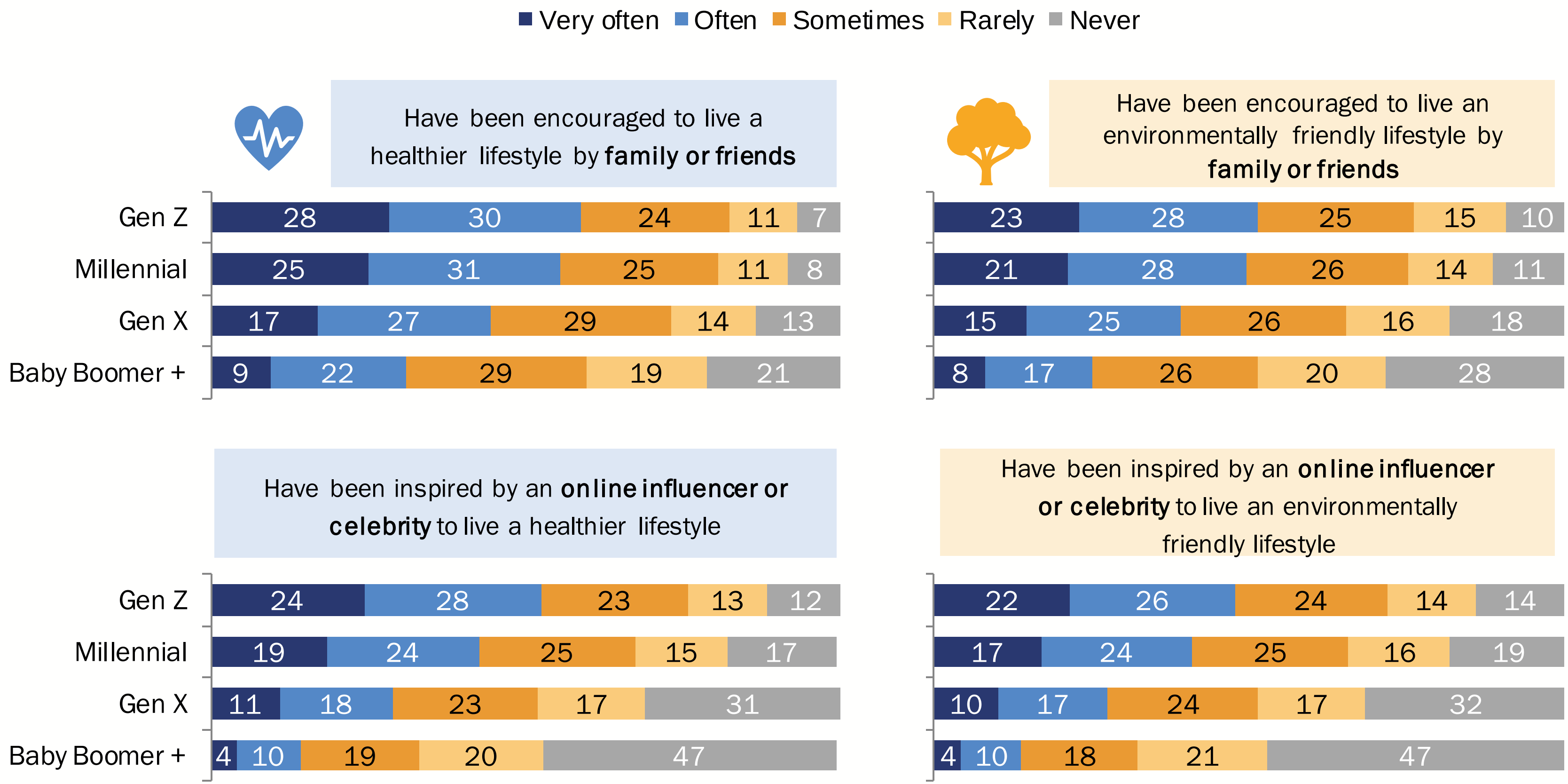

Q19. Over the past year, please indicate how often you have done or experienced each of the following.

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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

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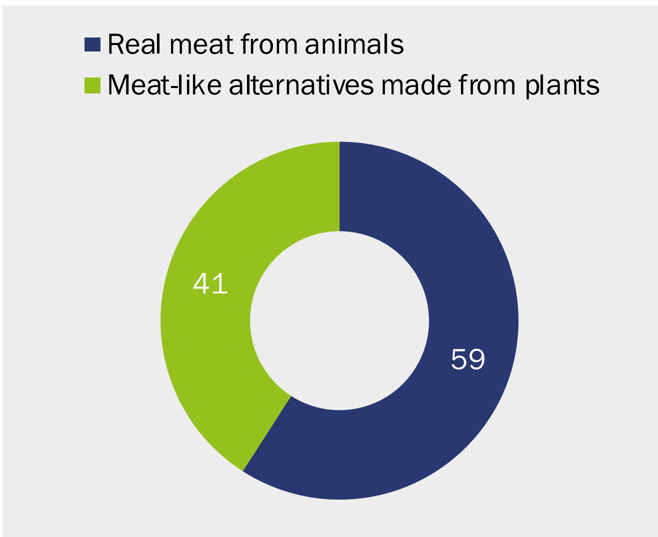
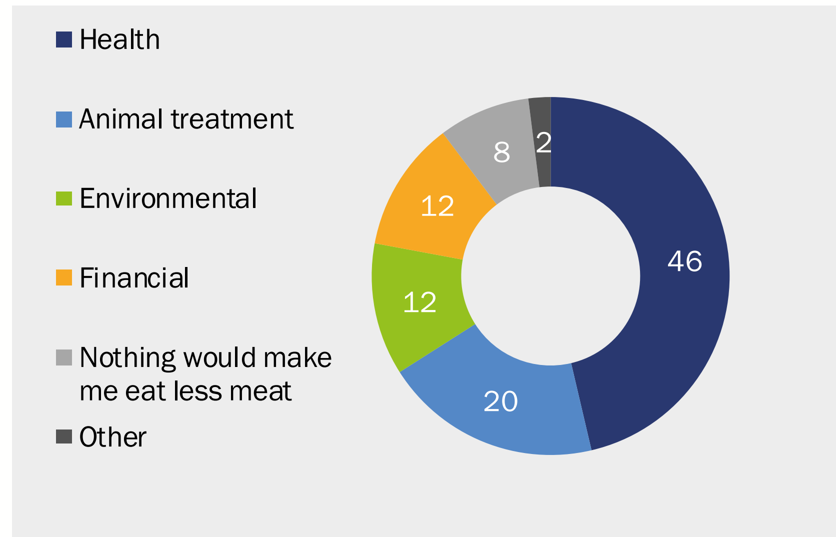
Assuming equal **taste**, **nutritional value**, **cost**
Meat eaters prefer…



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?

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Q&A

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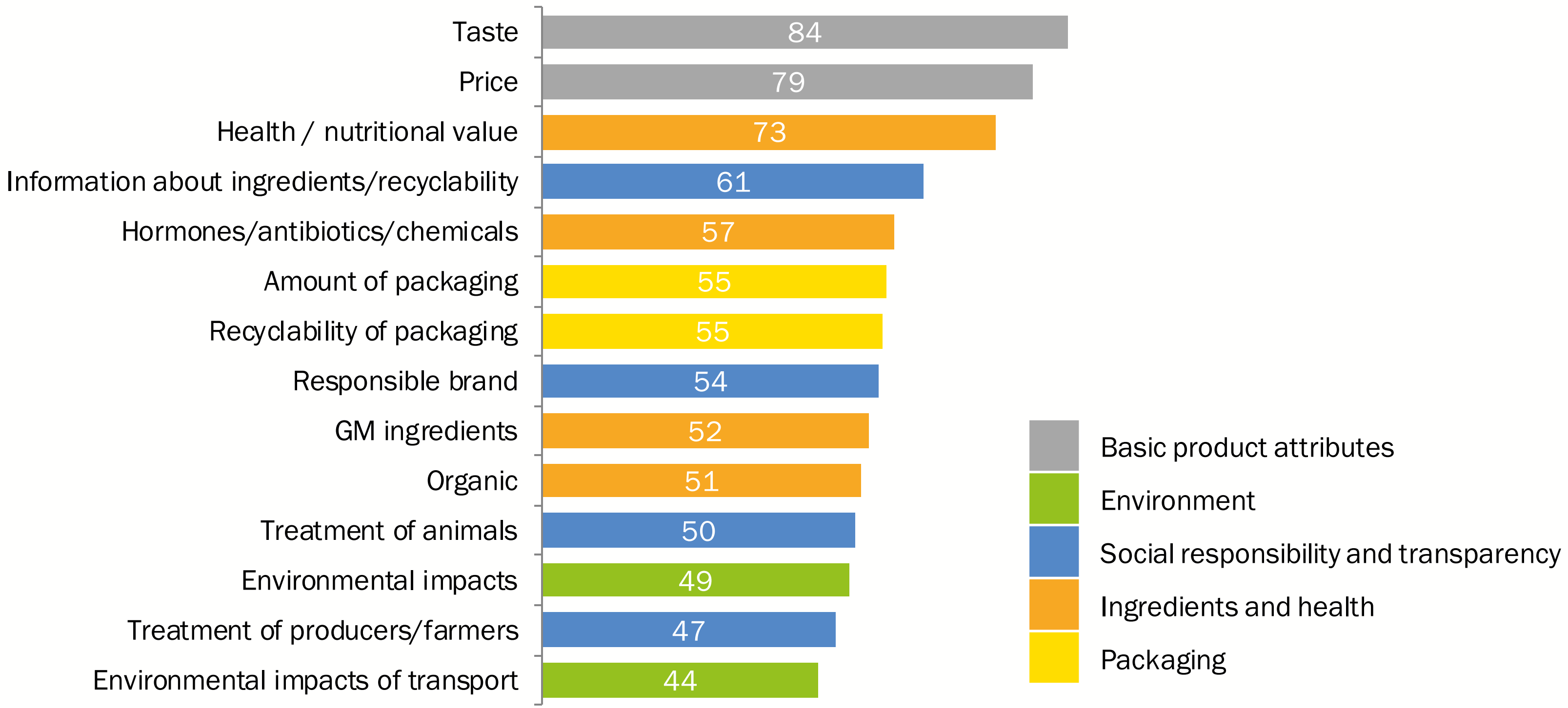
Taste, price, and health are determinants for food/drinks purchase choices; environmental impacts are less likely to be priorities but are still important

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

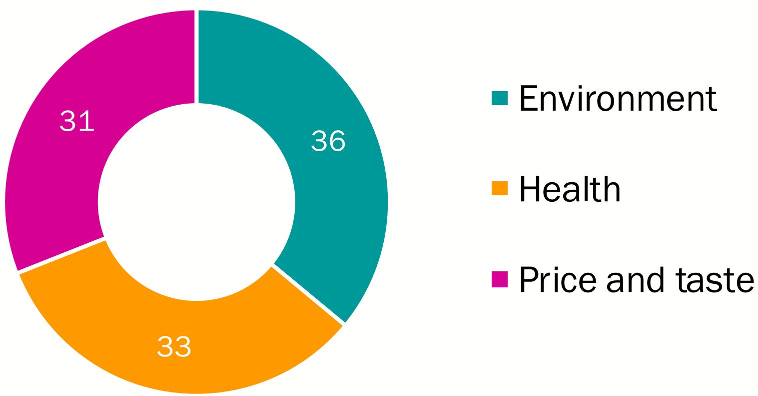


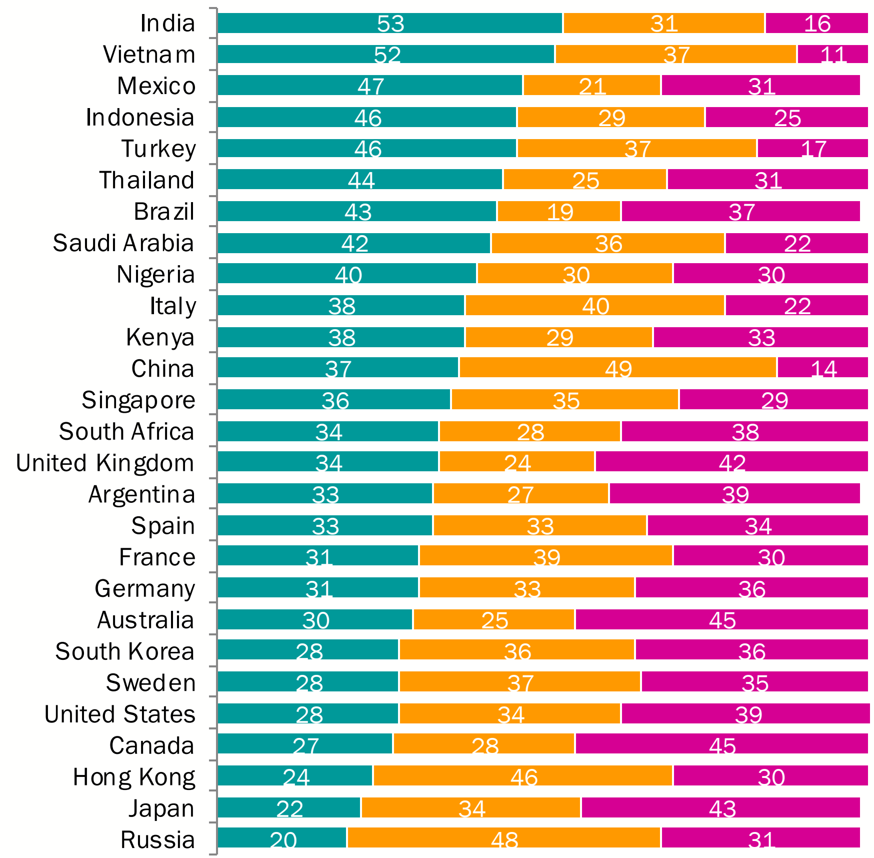
Q17. Thinking of the foods and drinks that you choose and how they are produced, distributed and sold, please indicate how often you consider each of the following in your choices.

When considering food and drink purchases, consumers fall into three segments

Purchase Consideration Segmentation, Average of 27 Markets, 2020

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.





The largest segment in each market varies

Largest Purchase Consideration Segment, by Market, 2020

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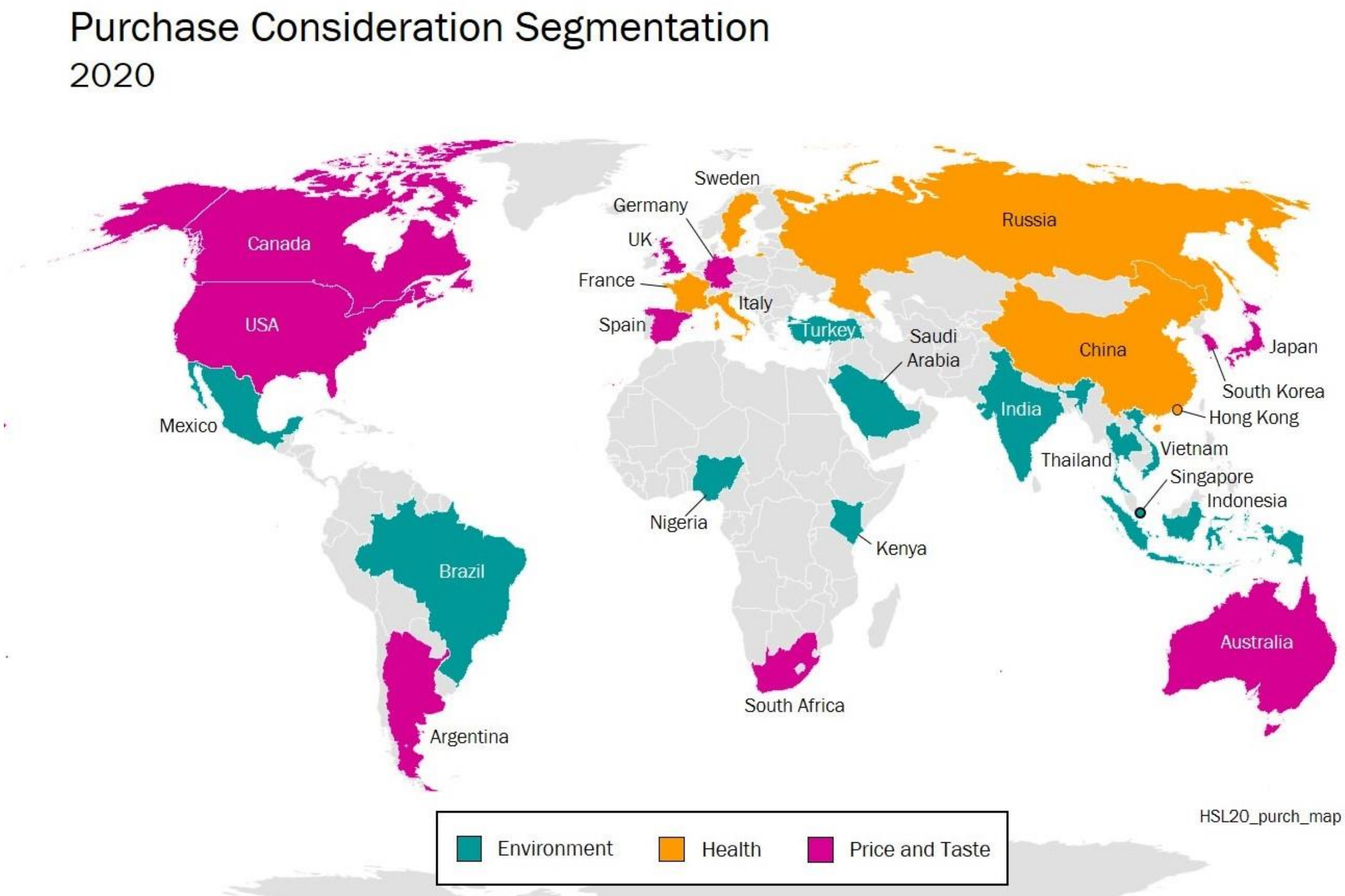

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