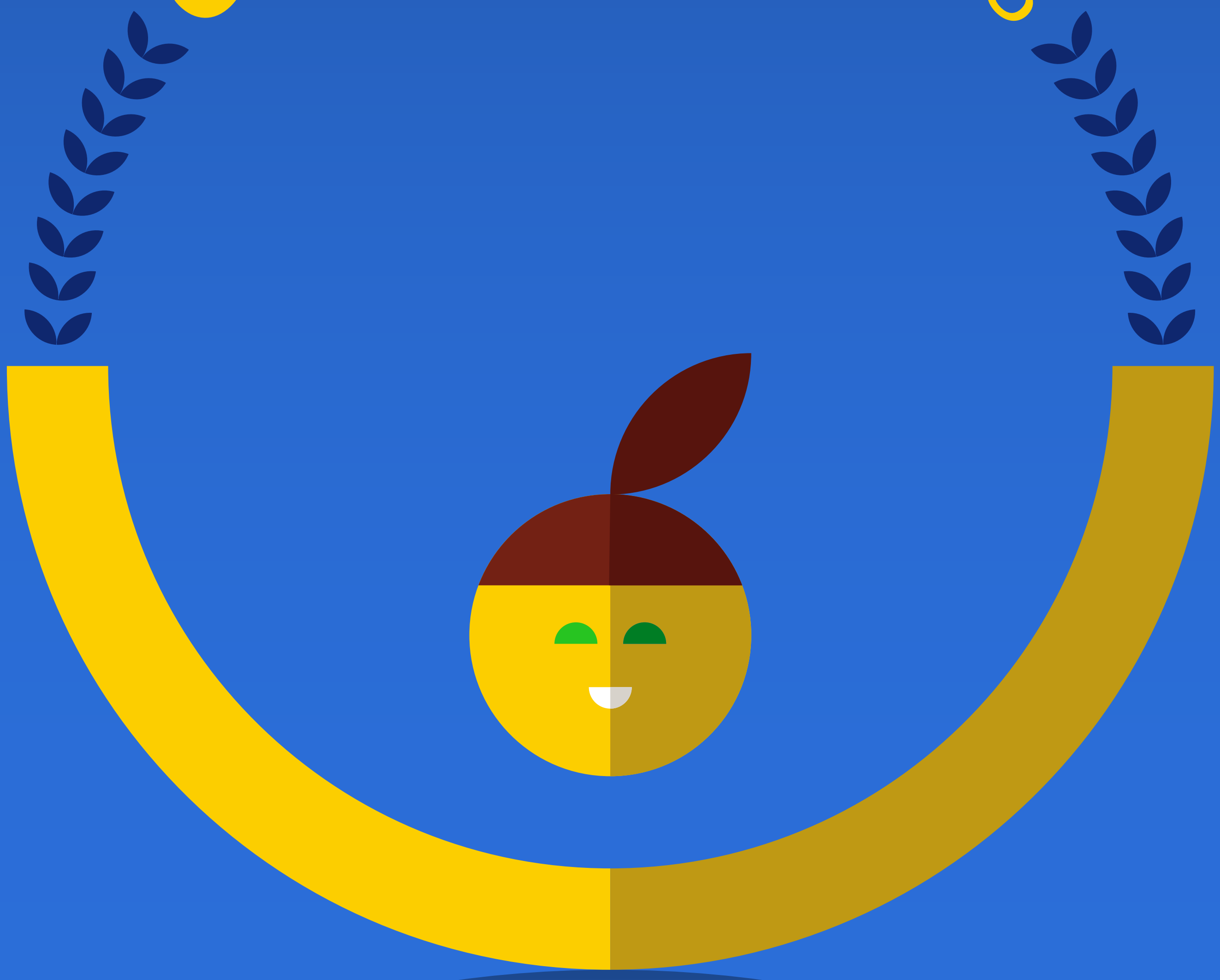
Grains of Truth 2023



EAT x GlobeScan

Global Consumer Research on
Healthy and Sustainable Food Systems

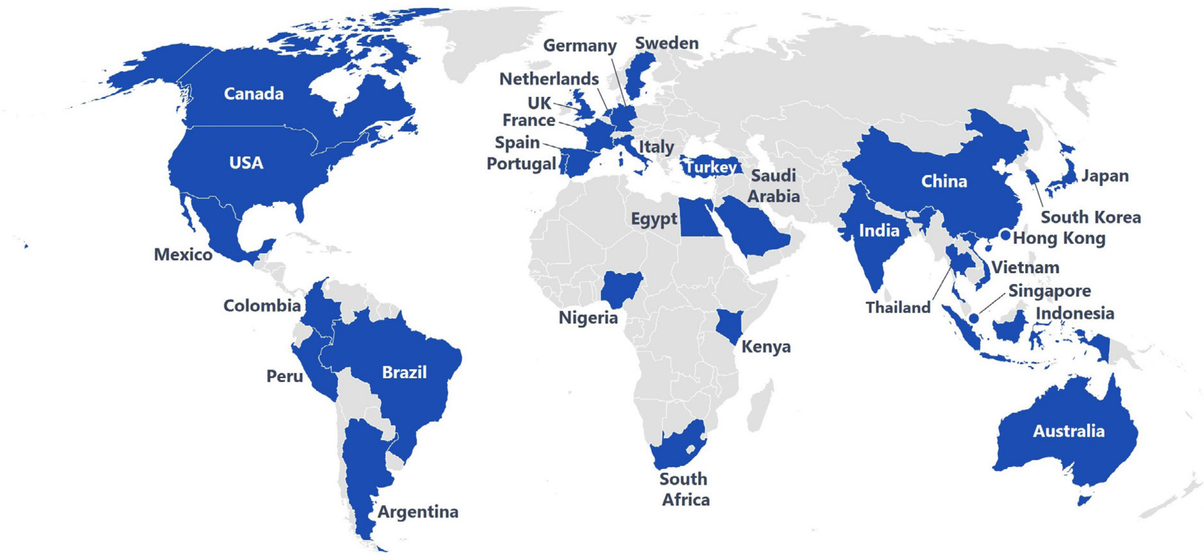
Contents

Research Methodology

- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore), and 1,500 in USA (*n*=29,565).
- Samples representative of online population, weighted to reflect general population census data.
- Online surveying in July and August 2023.
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.

Participating Countries

2023



Introduction

EAT and GlobeScan wanted to conduct significant research on sustainable food systems. Since 2021, the two organizations have collaborated yearly on developing questions to the public in 31 markets around the world about their definitions of good, healthy, and sustainable food, their concerns about the current food system, and who should drive the changes needed to improve it.

This report presents the insights gained from this research, with the hope of contributing to the transformation of the global food system.

Executive Summary

1 — Consumer Attitudes and Behaviors

There has been a slight but steady increase in people eating healthier food and eating vegetarian or vegan food in the past few years, with proportions eating healthy food most or all of the time increasing from 59 percent in 2021 to 61 percent in 2023. The proportion that is frequently eating a plant-based diet has increased from 20 percent to 23 percent in the same period.

- Older generations are more likely to say they frequently eat healthy food but are less likely to frequently eat a plant-based diet; 69 percent of Baby Boomers and older say they eat healthy food compared to 58 percent of Gen Z, but only 16 percent of Baby Boomers and older say they eat plant-based compared to 27 percent of Gen Z and Millennials. Increases in eating a vegetarian or vegan diet are mostly driven by Gen Z and Gen X, while the overall increase in eating healthy food is mostly driven by Gen Z. Although Gen Z remains the age group that is least likely to eat healthy food, proportions of this cohort claiming to frequently do so has increased from 51 percent in 2021 to 58 percent in 2023.
- Packaged food and beverage brands are doing better than other categories in communicating about being sustainable and having their communications trusted. Fifty-seven percent say they have seen, read, or heard at least "some" information from food and beverage brands communicating or marketing on how environmentally friendly they are; however, just over four in ten say they have not been reached. Of those who have been reached, 30 percent say they have "a great deal" of trust in the information they received while another 44 percent say they have "some" trust.
- Nearly four in ten consumers (38%) also say they have bought an increased amount of environmentally friendly fresh food in the past year, although just under a third (29%) say they bought *less* environmentally friendly packaged food during the same period.

The Take-away: While there are positive signs that people are eating more healthy and sustainable diets, with as many as six in ten people globally claiming they frequently eat healthy food, growth is still very slow and eating vegetarian or vegan food remains infrequent for most people. Gen Z is driving most of the increase in the frequency of healthy and sustainable food consumption and will hopefully influence their older peers over time. While it is positive that sustainability communications from food and beverage brands have a relatively good reach and that these messages are generally trusted, food and beverage companies must try to reach even more consumers across all age groups to encourage more sustainable food choices.

Executive Summary (continued)

2 — Concern about the Food System

Pesticides, malnutrition, single-use plastic, and obesity and diet-related health issues are the most concerning aspects of the food system to the global public (i.e., how food is produced, processed, shipped, stored, sold to consumers, and disposed of), although concern is high across a range of issues. However, there has been a slight decrease in these concerns since 2021. As in 2021, older people tend to be more concerned with these issues than those who are younger.

- The biggest declines in concern about the food system are seen in the impact of food production on human exposure to diseases (down 6 points), use of pesticides (down 6 points), and genetic modification of food (down 5 points). Countries showing the biggest overall drops in concern about the food system are the USA, Germany, and Thailand, all having declined by 4 percentage points each on average across all issues.
- Most countries show decreased concern about the use of chemical pesticides and fertilizers in agriculture, with people in Germany (down 13 points) and Hong Kong (down 12 points) presenting the greatest decrease in concern. Nevertheless, this issue remains the most concerning to the global public along with malnutrition.
- Baby Boomers+ and Gen X consumers are more concerned than Gen Z and Millennial consumers across 13 of the 16 issues in the food system, with concern declining from oldest to youngest. The generational gaps between Baby Boomers+ and Gen Z are at their widest for pesticides (16 points), overfishing (14 points), single-use plastic (12 points), and genetic modification (11 points).

The Take-away: The fading collective memory of the COVID-19 pandemic and the focus on the cost-of-living crisis may be driving factors in the decline in concern about the food system, and this could also be reflected in the decrease in concern about human exposure to diseases in particular. Despite the widespread decline in concern about pesticides and fertilizers, this issue continues to be a top worry as it is associated both with risks to human health and environmental degradation. Increased transparency by food producers about how food is produced and why certain interventions are needed remains crucial to ensure consumer trust.

Executive Summary (continued)

3 — Consumer Actions and Barriers

Lack of affordability and accessibility are the biggest barriers preventing people from buying more sustainable foods, with affordability now more of an issue in 2023 compared to 2021. Consumers have also become more likely to say buying healthy and sustainable food is just “not worth it,” suggesting the ongoing cost-of-living crisis is having an impact on consumers’ behaviors around healthy and sustainable food.

- Cooking a healthy meal and minimizing food waste are regarded as relatively easy by the global public, but opinion is more divided on cooking a vegetarian meal or buying sustainably produced food. However, fewer people now say that cooking a healthy meal at home is easy compared to 2021 at the height of the pandemic.
- Older generations are more likely to say that it is easy to cook a healthy meal and to avoid food waste, while Millennials and Gen Z are more likely to find cooking plant-based meals and buying healthy and sustainable food to be easy.
- It has become noticeably more challenging to buy healthy and sustainable food in some countries, with over 30 percent of the public in Argentina, Brazil, Portugal, and South Korea saying they find it difficult to do so. Older generations lead the way in finding it easy to cook a healthy meal for their family, but they are also the ones who find buying sustainable food the most difficult.
- For those who find it difficult to buy healthy and sustainable food, more than half (52%) say it is because they cannot afford it, and a third (33%) say it is because it is not available. The number of people who say they cannot afford healthy and sustainable food has increased by 4 percentage points in the last two years – a clear indication of the impact of the cost-of-living crisis around the world.
- People in South Africa, Canada, and the USA find lack of affordability to be the biggest barrier to buying healthy and sustainable food, though most countries have seen increasing perceptions of high cost as a barrier since 2021. Some of the sharpest increases include Spain (16 points), Canada (13 points), Portugal (13 points), and Australia (12 points). The only exceptions to this trend are in China, Hong Kong, and India.

The Take-away: The cost-of-living crisis around the world is having a strong impact on people’s access to healthy and sustainable food, including in many rich countries. While governments, companies, and other actors need to collaborate on making food more sustainable, it is also increasingly important to address how more sustainable food can be made affordable enough for those affected by financial constraints.

Executive Summary (continued)

4 — Actors That Can Most Influence Positive Change

Nearly half of consumers worldwide think national governments are doing a very poor job at helping the public eat healthy and sustainable diets. In contrast, three-quarters think chefs and NGOs are doing a very good or satisfactory job helping consumers.

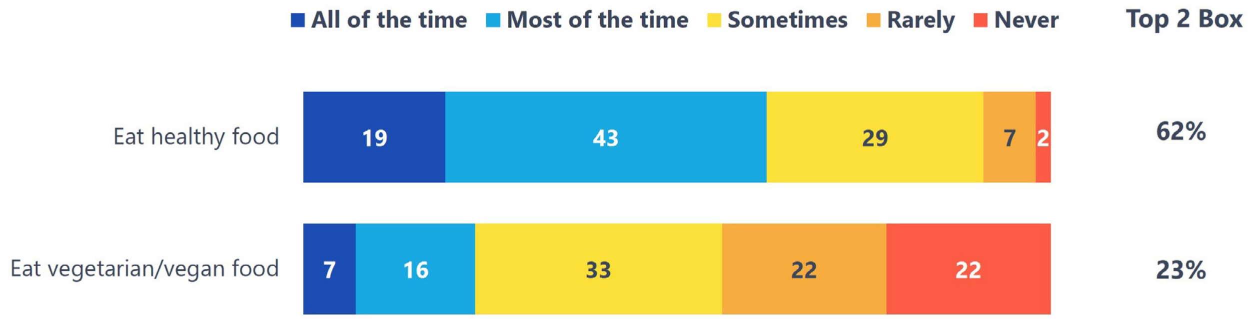
- Net ratings (good minus poor ratings) for government encouragement for healthy eating are negative for 24 out of the 31 countries surveyed. Net ratings are positive only in Saudi Arabia, Vietnam, China, Singapore, Egypt, India, and Indonesia. The worst-performing governments according to those surveyed include Peru, Argentina, Portugal, Columbia, and Italy.
- At an overall level, food and beverage companies (-9), the UN (-12), celebrities and influencers (-19), sub-national and national governments (-25 each), and the financial sector (-30) are all rated negatively. Chefs (+10) and NGOs (+9) are the only actors with positive net ratings.
- While Latin Americans, North Americans, and Europeans look mainly to NGOs, chefs, and to some extent food and beverage companies, people in Asia-Pacific and Africa and the Middle East point to a variety of actors that most help people eat healthy and sustainable food – including national and sub-national governments as well as the UN.
- People in Vietnam, Egypt, and Indonesia are most likely to rate food and beverage companies positively on helping people eat healthy and sustainable food, while people in Portugal, Argentina, and France tend to rate food and beverage companies the lowest.

The Take-away: The influence of chefs and NGOs is key to inspiring healthy and sustainable eating habits in many parts of the world and could be leveraged to nudge the global population toward changing their eating habits. However, perceptions vary across regions and in some places healthy and sustainable eating may be better achieved through government action.

1 — Consumer Attitudes and Behaviors

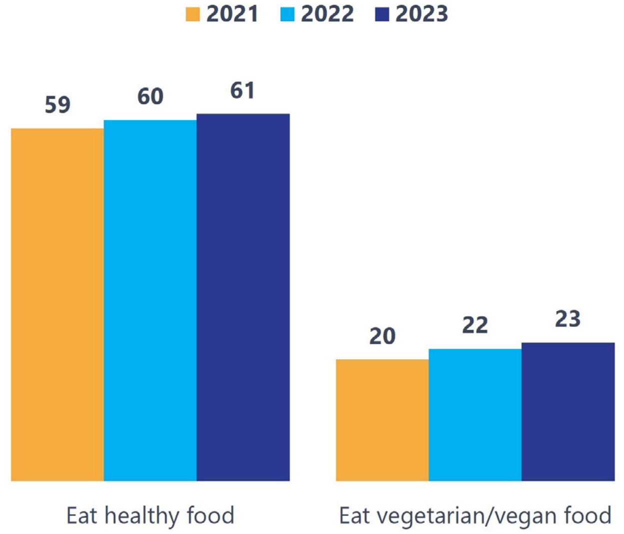
A majority of consumers eat healthy food frequently, but less than a quarter eat vegetarian or vegan food all or most of the time

Frequency of Healthy and Plant-based Food Consumption, Average of 31 Markets, 2023



There is a small but steady increase in eating healthy food and eating vegetarian/vegan food over the past three years

Frequency of Healthy and Plant-based Food Consumption, "Most" and "All of the Time," Average of 23 Markets,* 2021–2023

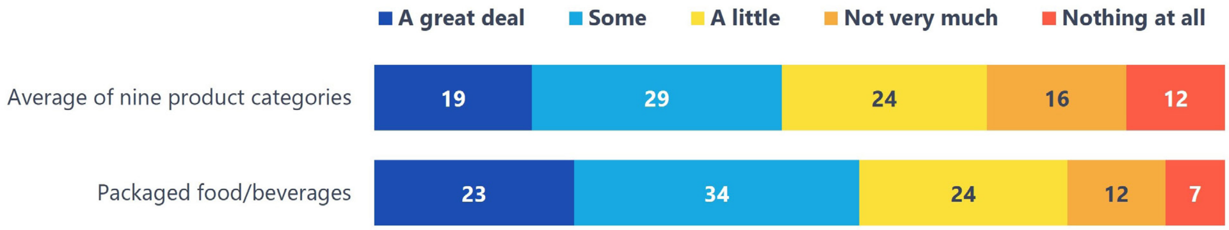


*For consistent tracking, this chart only includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Italy, Indonesia, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, UK, and USA

1 — Consumer Attitudes and Behaviors

Consumers are more likely to have seen some sustainability communications from packaged food/beverages brands compared to other types of products; those who have been engaged generally have high trust in sustainability communications

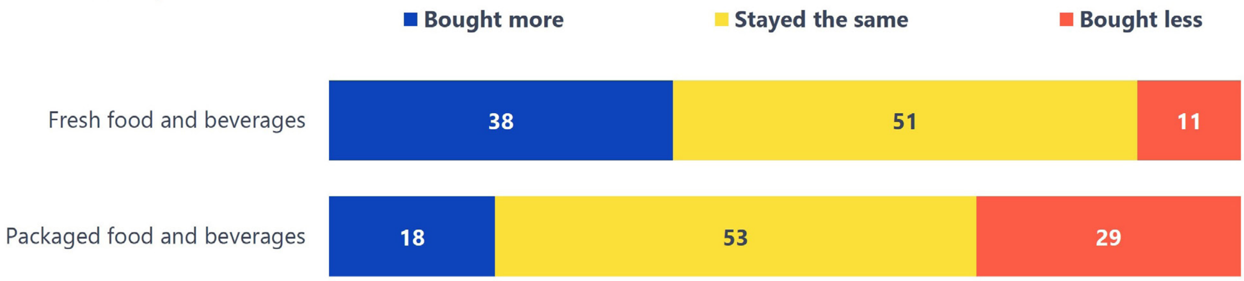
Have Seen/Read/Heard Brands Communicate on Being Sustainable, Average of 31 Markets, 2023



Trust in Sustainability Communications, Subsample: Those Who Have Heard "A Great Deal" and "Some" of Sustainability Communications for Each Product Type, Average of 31 Markets, 2023

Consumers are much more likely to say they have bought an increased amount of sustainable fresh food/beverages than sustainable packaged food/beverages in past year; three in ten say they have bought <u>less</u> sustainable packaged food/beverages in past year

Frequency of Buying Sustainable Product Options in the Past 12 Months, Average of 31 Markets, 2023

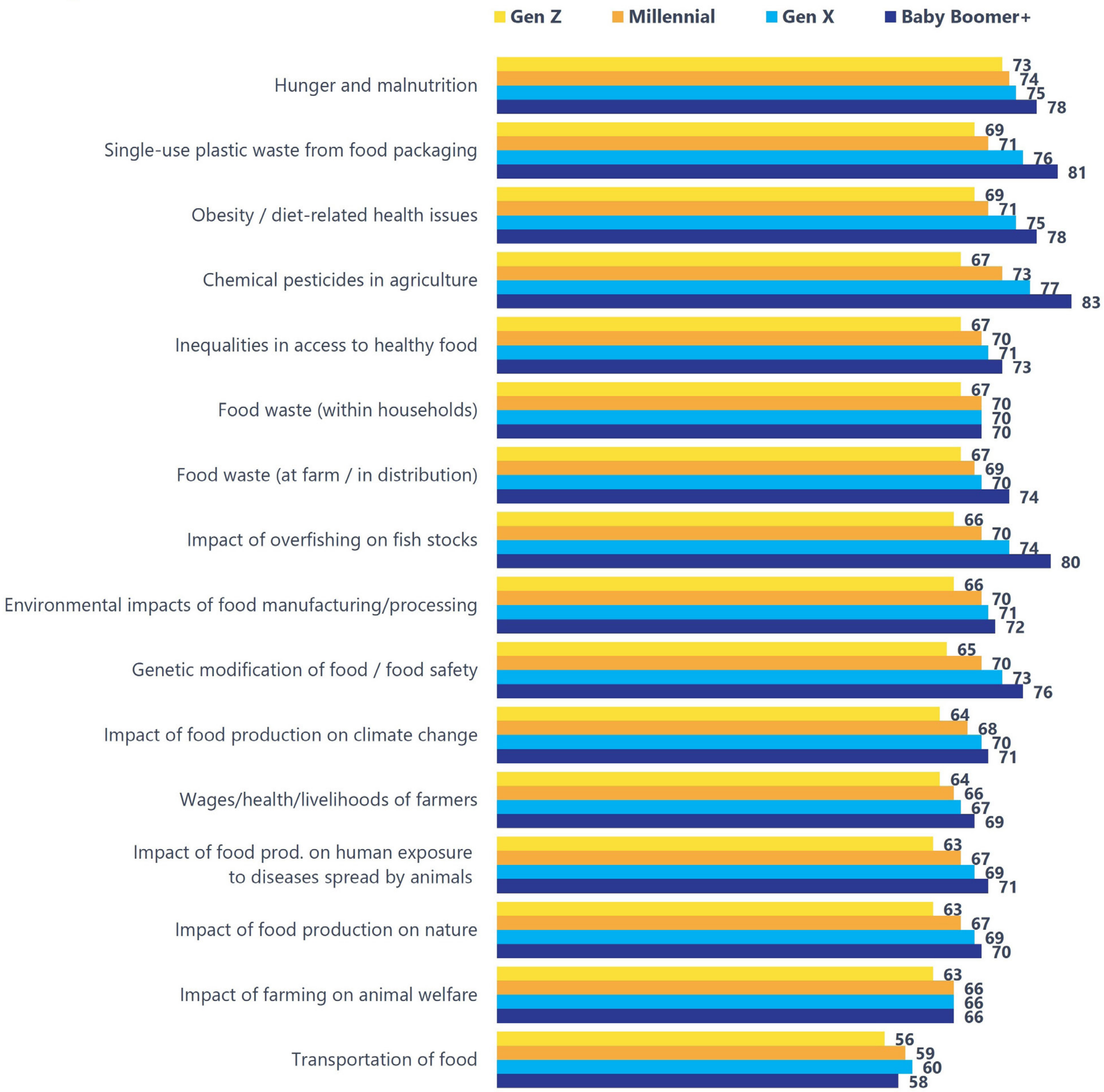


Note: Those who answered "Not applicable to me / I do not buy this type of product" were removed from sample

2 — Concern about the Food System

Older consumers tend to be more concerned about most food issues compared to younger people; this is similar to 2021 findings

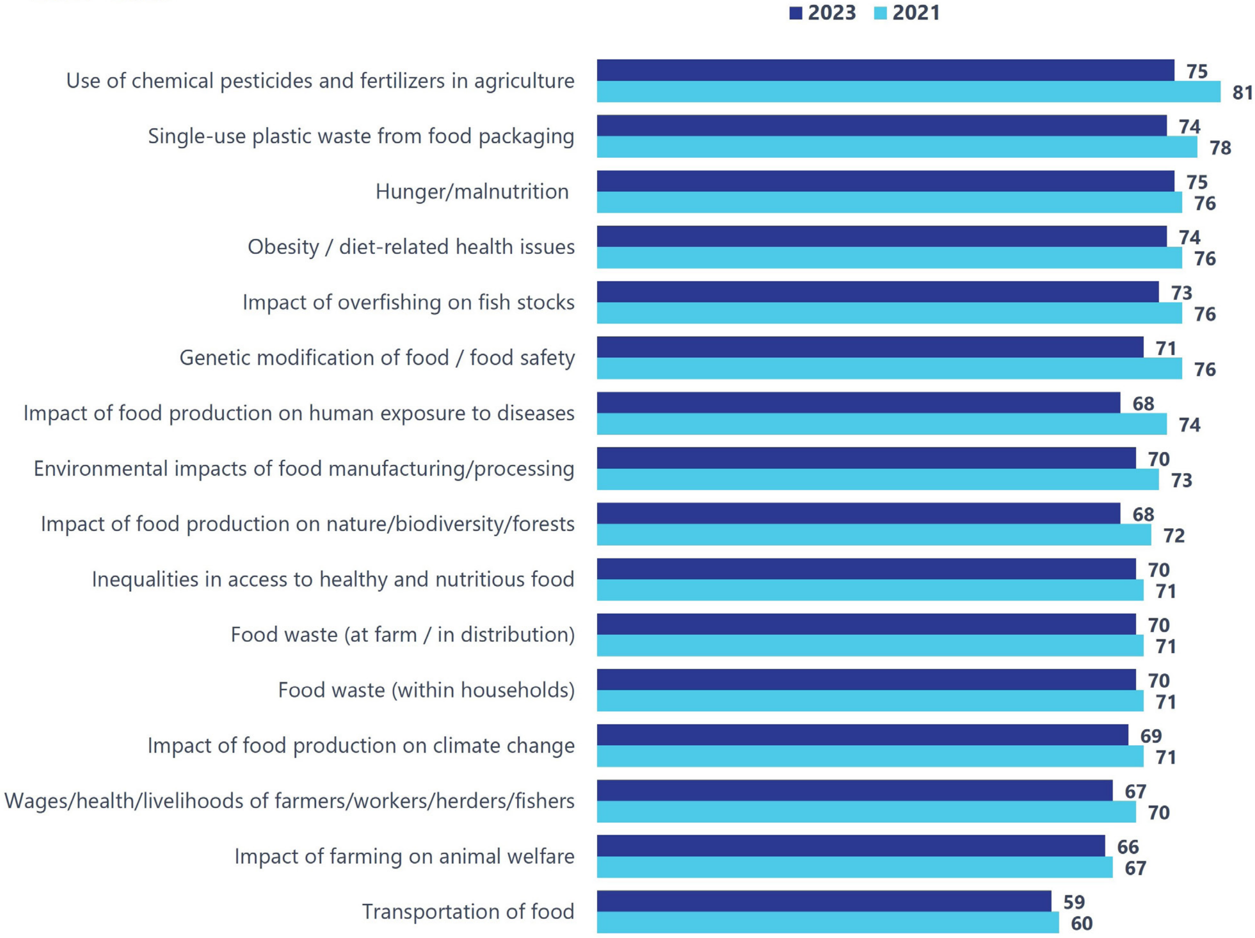
Concern about Food System, "Very" and "Somewhat Concerned," by Generation, Average of 31 Markets, 2023



2 — Concern about the Food System

There has been a slight decrease across almost all types of concerns about the food system compared to 2021

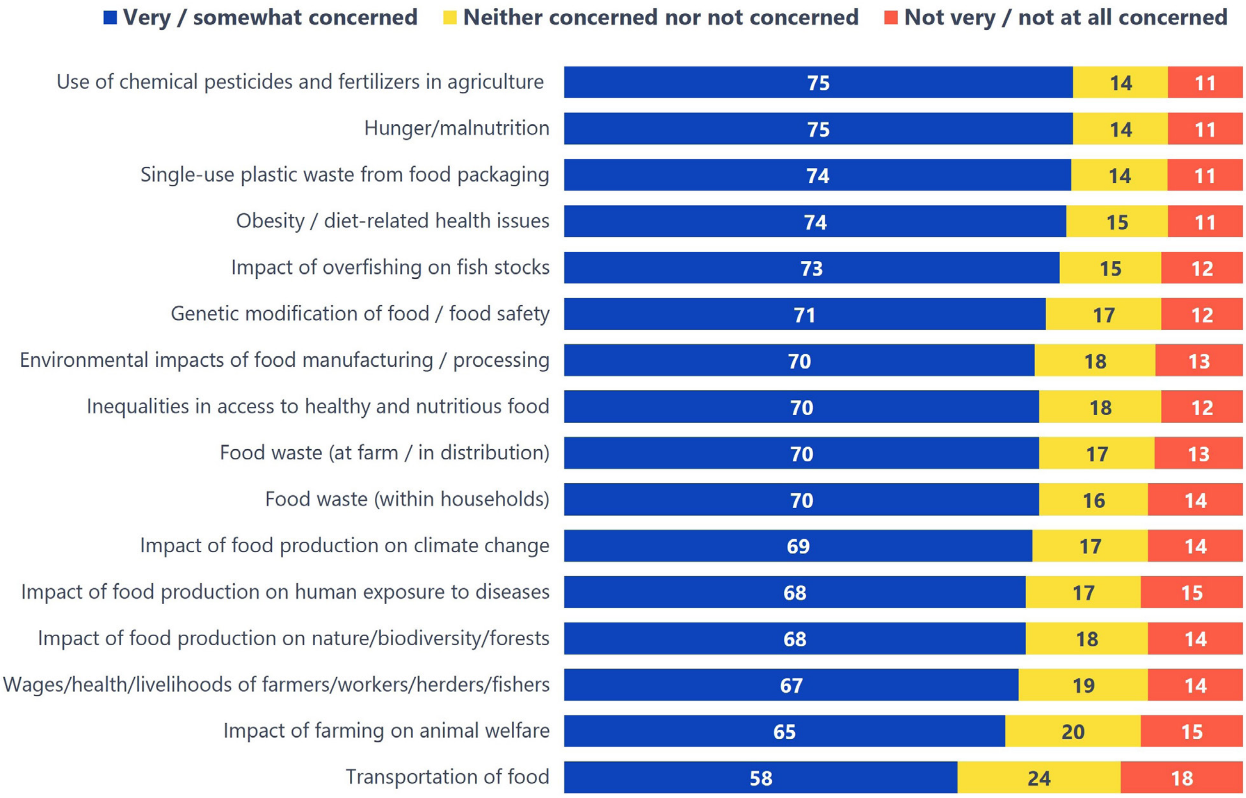
Concern about Food System, "Very" and "Somewhat Concerned," Average of 31 Markets, 2021–2023



2 — Concern about the Food System

Consumers are most concerned about the use of pesticides and hunger and malnutrition

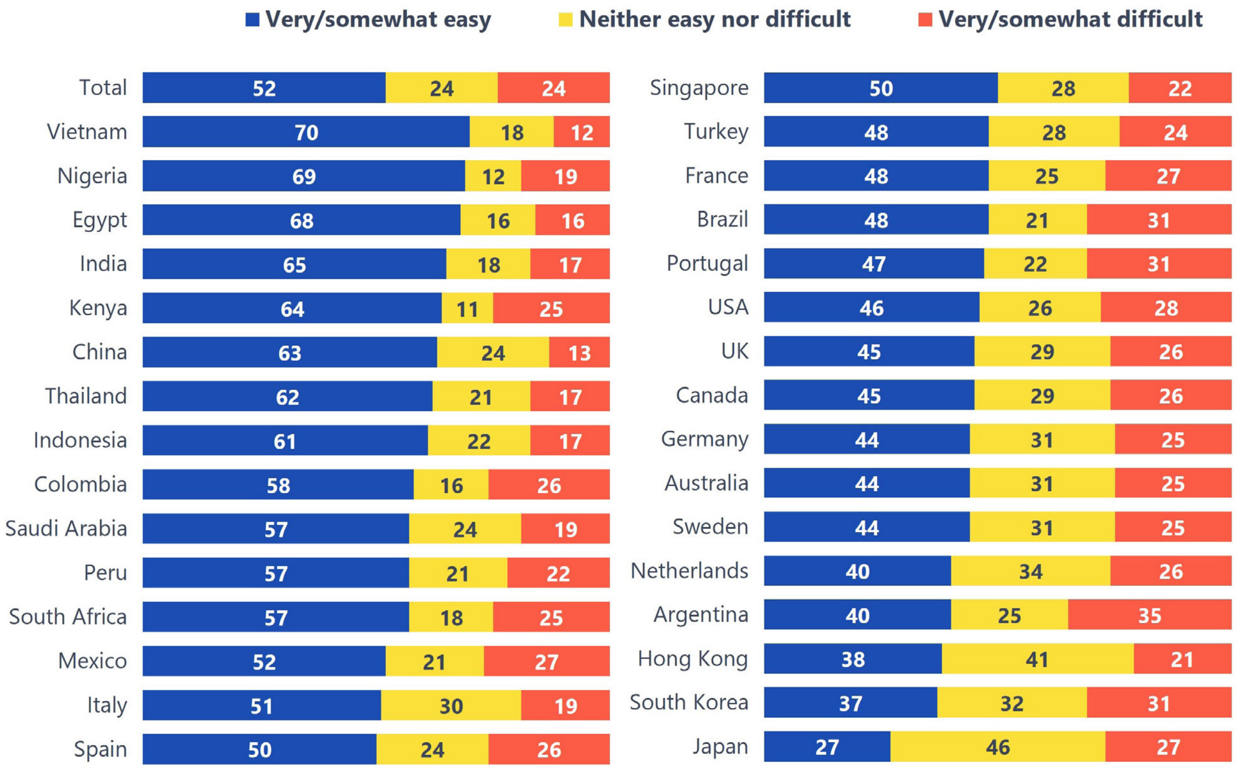
Concern about Food System, Average of 31 Markets, 2023



3 — Consumer Actions and Barriers

People in Vietnam, Nigeria, and Egypt claim that buying sustainably produced healthy food is easier than people in other countries surveyed

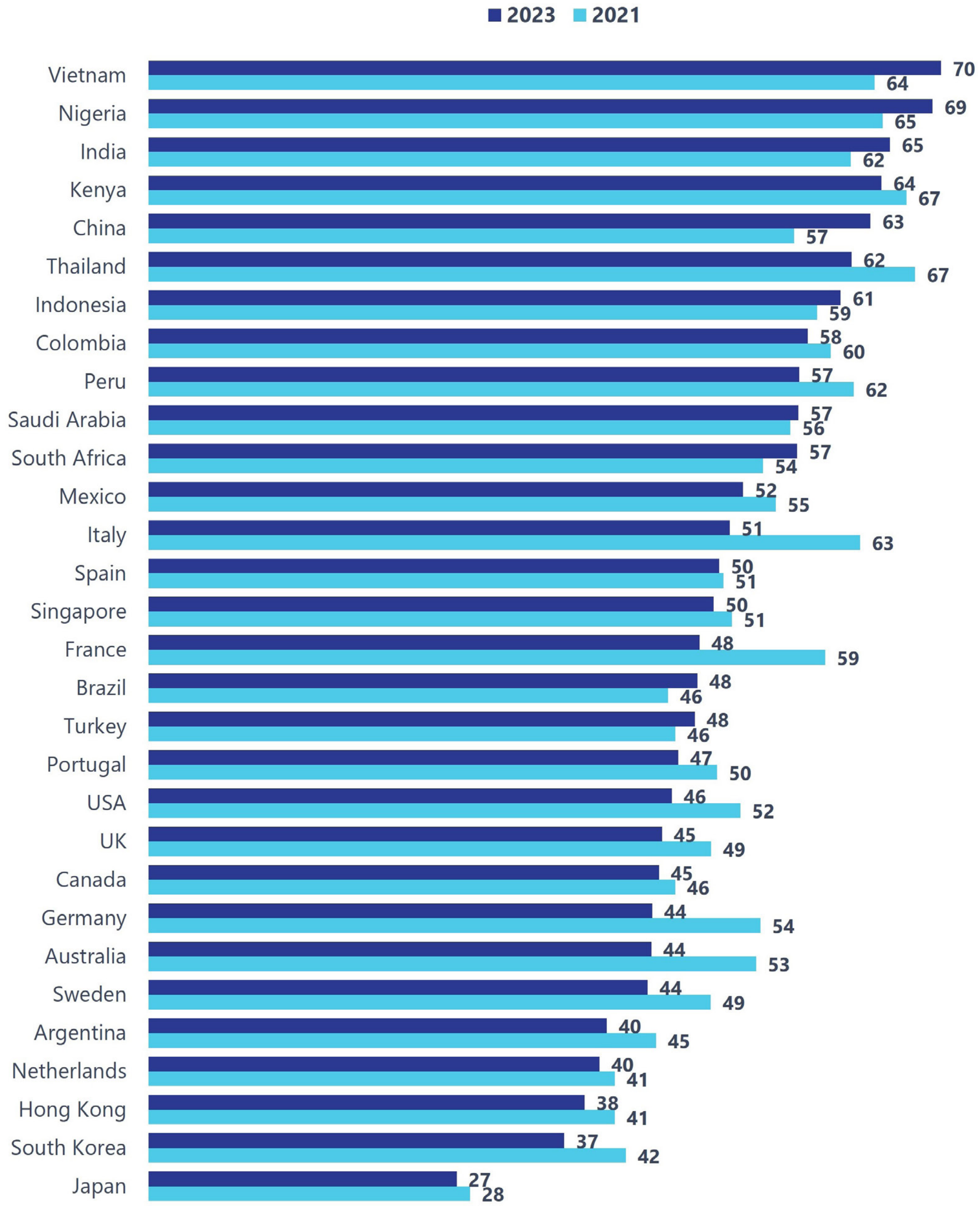
Ease/Difficulty of Buying Healthy Food That Is Sustainably Produced, by Market, 2023



3 — Consumer Actions and Barriers

People from Vietnam, Nigeria, and China have seen the biggest increase in buying healthy food that is sustainably produced

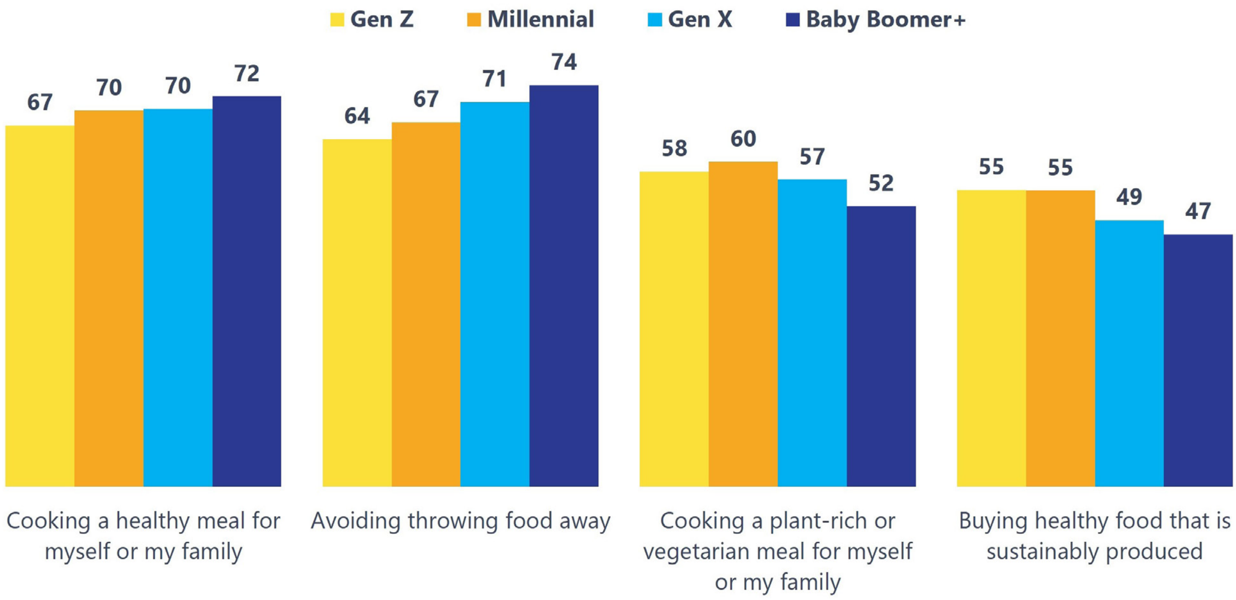
Ease/Difficulty of Buying Healthy Food That Is Sustainably Produced, by Market, 2021–2023



3 — Consumer Actions and Barriers

Older generations are more likely to say that it is easy to cook a healthy meal and avoid food waste but find it more difficult to buy healthy and sustainable food; Millennials are most likely to find cooking plant-based meals to be easy

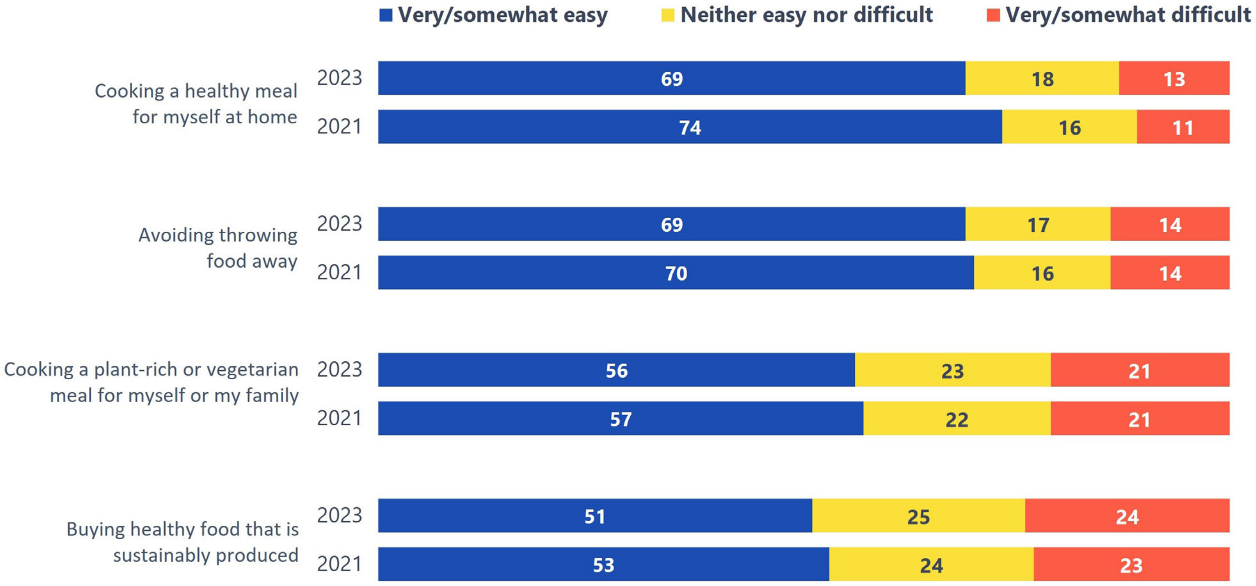
Food and Eating Habits at Home, Ease of Actions, “Somewhat” and “Very Easy,” by Generation, Average of 31 Markets, 2023



3 — Consumer Actions and Barriers

People claim that cooking a healthy meal at home is now slightly less easy compared to 2021 at the height of the pandemic

Food and Eating Habits at Home, Ease/Difficulty of Actions, Average of 30 Markets,* 2021–2023

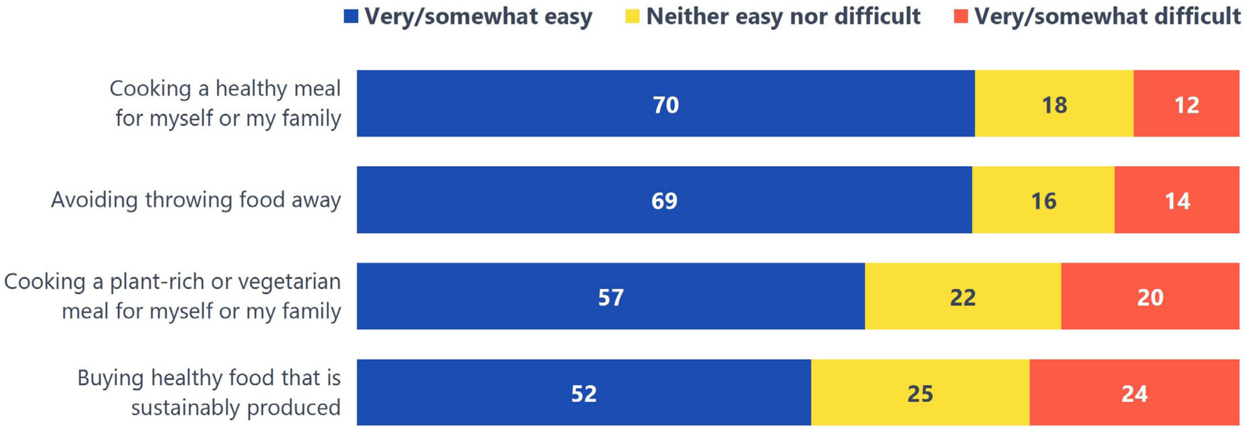


*For consistent tracking, this chart does not include Russia and Egypt, as these countries were not surveyed in 2021 and 2023.

3 — Consumer Actions and Barriers

Cooking a healthy meal and avoiding throwing food away are seen as relatively easy; fewer find it easy to buy sustainably produced food or cook plant-based meals

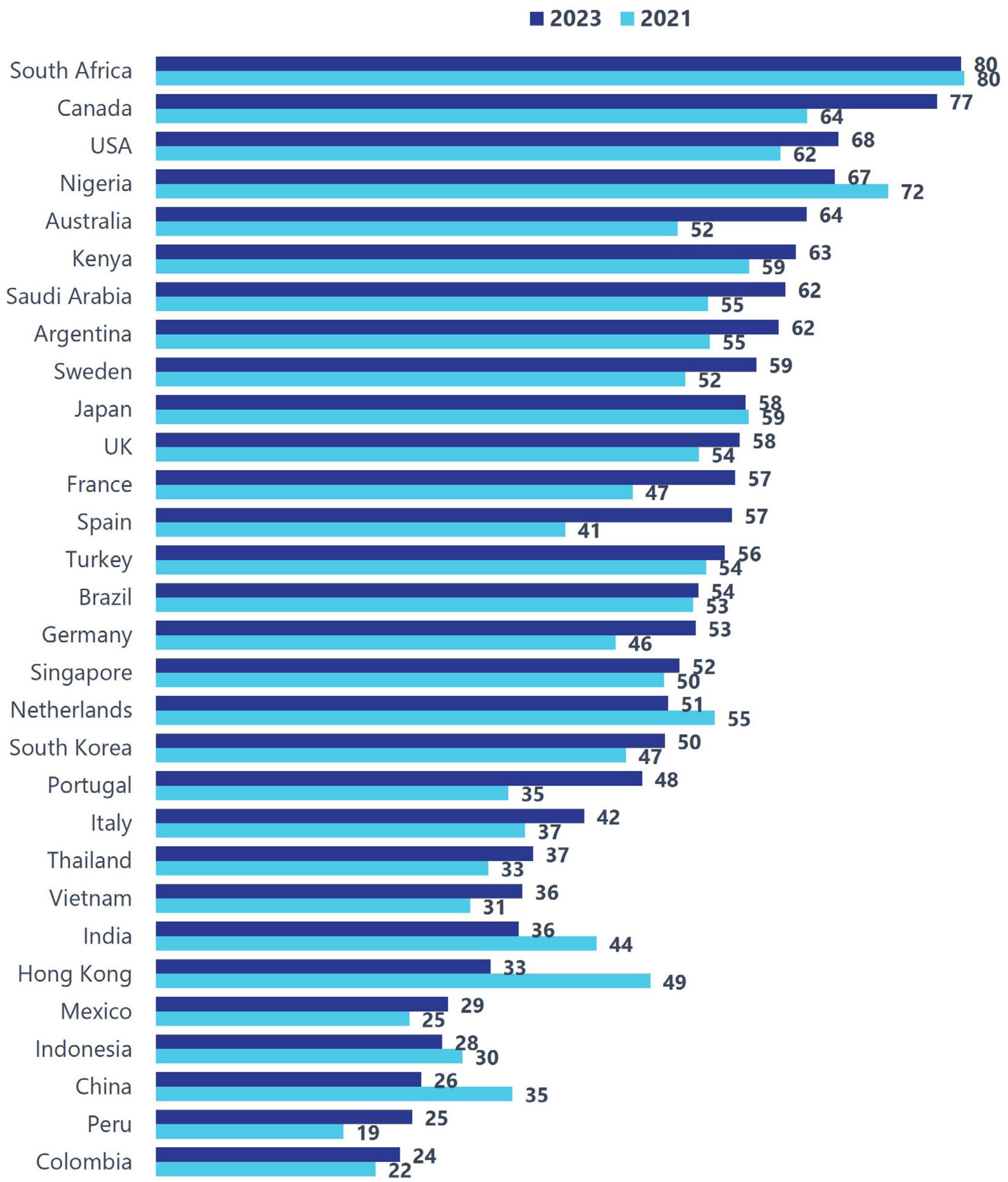
Food and Eating Habits at Home, Ease/Difficulty of Actions, Average of 31 Markets, 2023



3 — Consumer Actions and Barriers

People in South Africa, Canada, and the US find lack of affordability a bigger barrier than others, but many markets have seen high cost increases as a barrier compared to 2021; exceptions include China, Hong Kong, and India

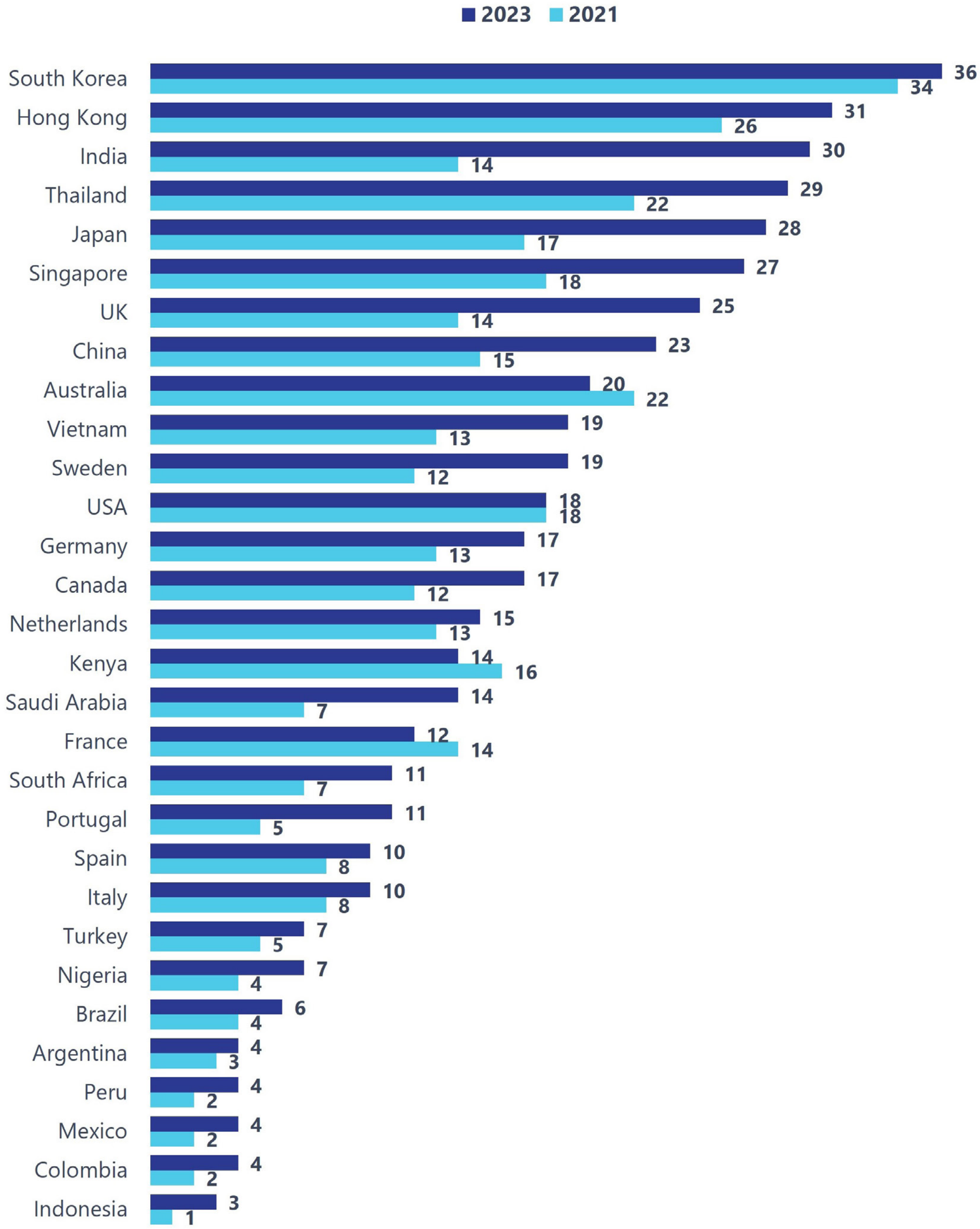
Difficulty to Buy Healthy and Sustainable Food Due to Lack of Affordability, Subsample: Those Answering "Very" and "Somewhat Difficult" to Buy Healthy Food That Is Sustainably Produced, by Market, 2021–2023



3 — Consumer Actions and Barriers

In most countries surveyed there has also been an increase in the proportion of people saying healthy and sustainable food is just "not worth it"

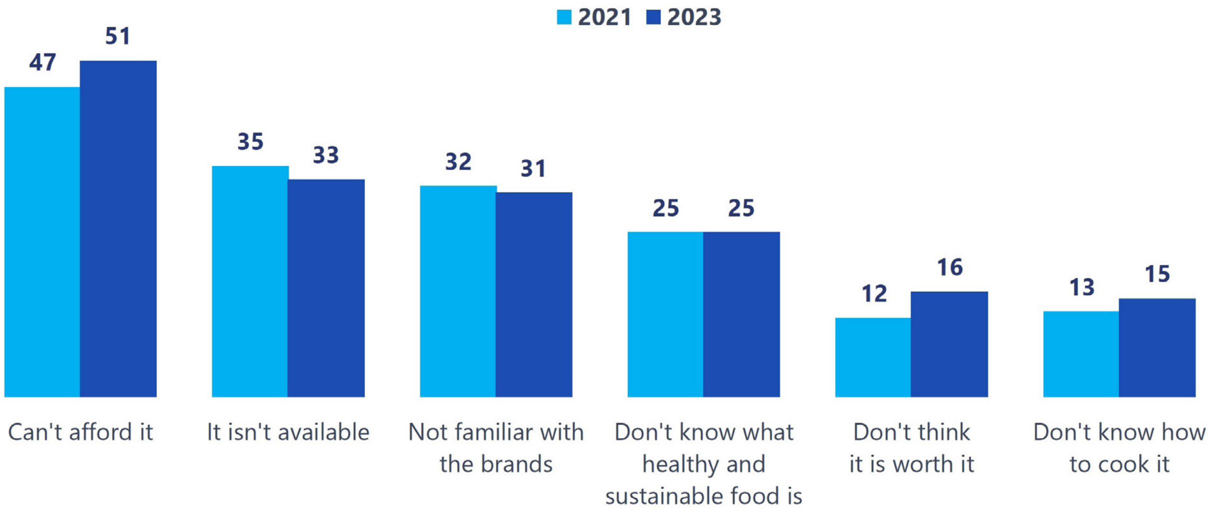
Difficulty to Buy Healthy and Sustainable Food Due to Not Thinking That It Is Worth It, Subsample: Those Answering "Very" and "Somewhat Difficult" to Buy Healthy Food That Is Sustainably Produced, by Market, 2021–2023



3 — Consumer Actions and Barriers

There has been an increase in the number of people who say they are not able to afford healthy and sustainable food and who say it is not worth the cost

Difficulty to Buy Healthy and Sustainable Food, Subsample: Those Answering "Very" and "Somewhat Difficult" to Buy Healthy Food That Is Sustainably Produced, Average of 30 Markets,* 2021–2023

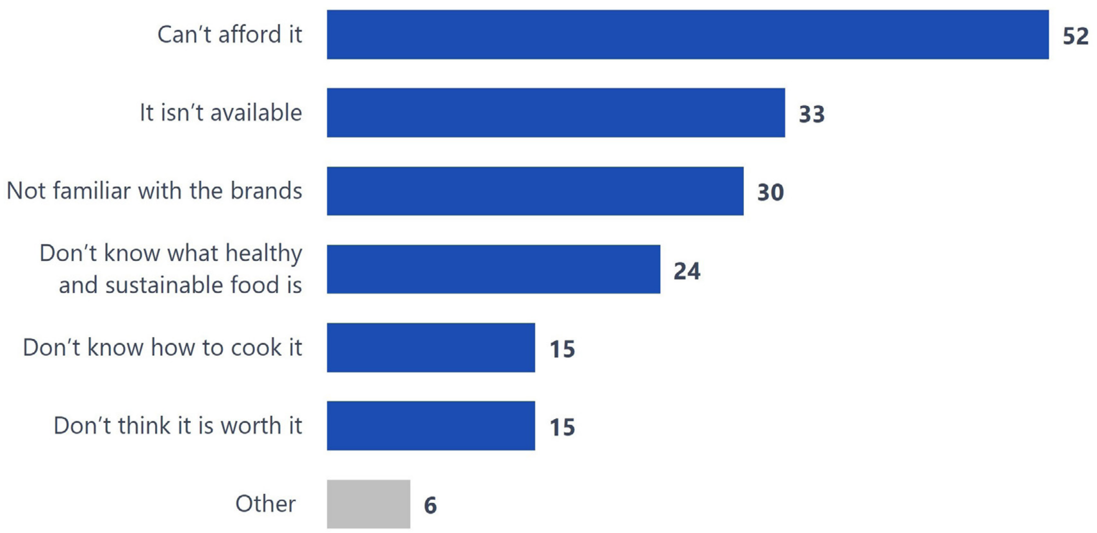


*For consistent tracking, this chart does not include Russia and Egypt, as these countries were not surveyed in 2021 and 2023.

3 — Consumer Actions and Barriers

A lack of affordability is the main barrier to buying sustainable food, followed by lack of availability and not being familiar with the brands offering sustainable options

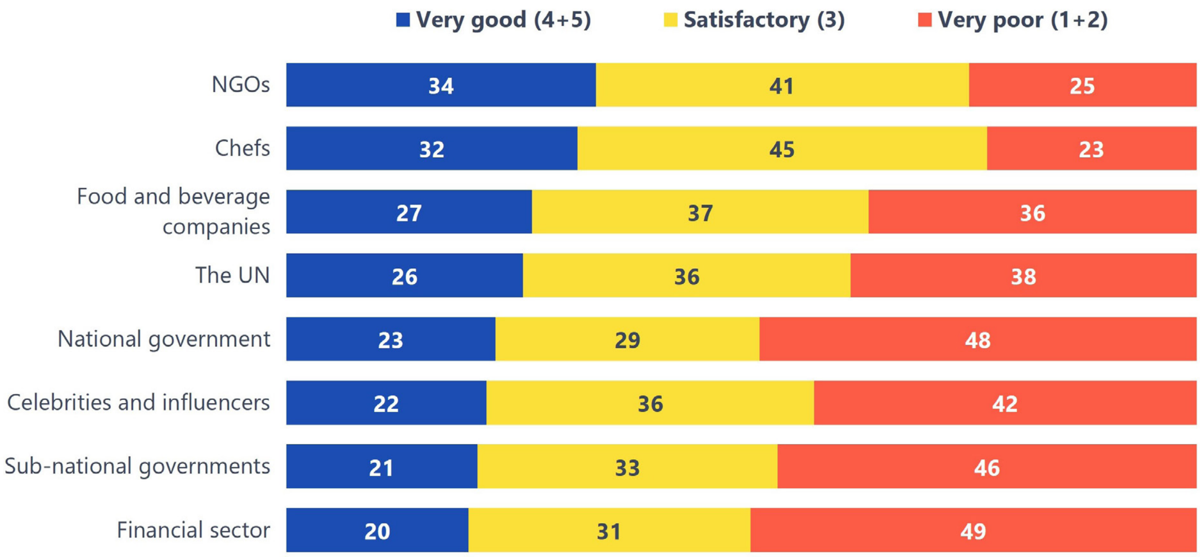
Difficulty to Buy Healthy and Sustainable Food, Subsample: Those Answering "Very" and "Somewhat Difficult" to Buy Healthy Food That Is Sustainably Produced, Average of 31 Markets, 2023



4 — Actors That Can Most Influence Positive Change

NGOs and chefs are the actors seen as being most helpful in encouraging people to eat more healthy and sustainable food

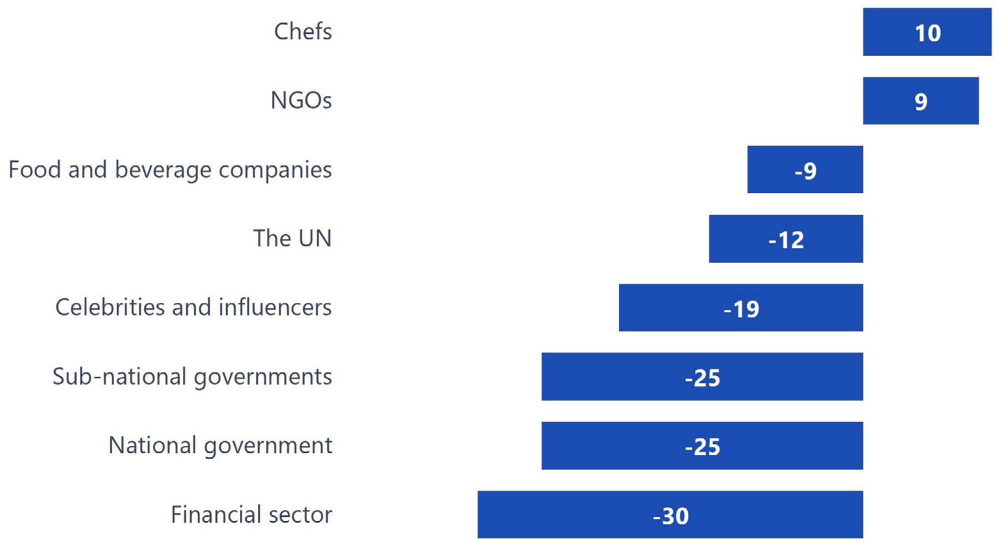
Actors Helping People Eat Healthy and Sustainable Food, Average of 31 Markets, 2023



4 — Actors That Can Most Influence Positive Change

Chefs and NGOs have a net positive rating, meaning more people see them as being good at helping compared to being poor at helping

Actors Helping People Eat Healthy and Sustainable Food, Net Ratings (“Good” Minus “Poor”), Average of 31 Markets, 2023



Contact Us

Tove Malmqvist

Senior Project Manager
tove.malmqvist@globescan.com

Stacy Rowland

Communications Director
stacy.rowland@globescan.com

GlobeScan is a global insights and advisory consultancy working at the intersection of brand purpose, sustainability, and trust.

We partner with leading companies, NGOs, and governmental organizations to deliver insights that guide decision-making and build strategies that contribute to a sustainable and equitable future

Established in 1987, we have offices in Cape Town, Hong Kong, London, Mumbai, Paris, San Francisco, São Paulo, and Toronto. As a proudly independent, employee-owned company, we're invested in the long-term success of our clients and society. GlobeScan is a Certified B Corp and a participant of the United Nations Global Compact.

globescan.com

Iain Shepherd

Director of Communication and Engagement
iain@eatforum.org

EAT is a global non-profit founded by the Stordalen Foundation, Stockholm Resilience Centre and the Wellcome Trust to catalyze a food system transformation. EAT works to achieve a vision of a fair and sustainable global food system for healthy people and planet – leaving no one behind, to be achieved through sound science, impatient disruption, and novel partnerships. To ensure success, EAT connects and partners with members of the science, policy, and business communities following a framework for change centered on a dynamic three-way interaction across knowledge, engagement and action.

eatforum.org