PUBLIC POLL FINDINGS AND METHODOLOGY

Six ways the pandemic will change food and how we eat in the future

What the Future: Eating, explores how pandemic food deliveries are reshaping how and where Americans get their food and consume it

NEW YORK, December 6, 2021 — The future of food and eating is being changed by six factors that will shape how food growers to retailers will market and sell their products. The big question is whether and how these changes will stick. Ipsos examines all of this and imagines our eating future in its latest issue of **What the Future** magazine**.** Download the Eating issue.

To provide context, Ipsos asked experts in synthetic biology, quick-service restaurants, grocery, and supply chain and logistics how these shifts will shape how people grow, buy, eat and supply food in the future:

- J. Casey Lippmeier, vice president of innovation, Conagen — Will we grow food in the future?
- Kevin Vasconi, chief information officer, The Wendy's Company — How will delivery drive food convenience in the future?
- Nichele Lindstrom, vice president of e-commerce, Whole Foods Market — How will the hybridization of grocery shopping evolve?
- Marina Mayer, editor-in-chief, Food Logistics and Supply & Demand Chain Executive — What's keeping us from making our food supply chain better?

In addition, Ipsos researchers share insights for brands and marketers based on these shifts. They include: How food brands can better link synthetic biology for purpose, what diners' new delivery habits will mean for restaurants, what the new "eating at home" means for grocers and restaurants, and what grocers can learn about keeping relevant amid supply chain uncertainty.

Below are research highlights, as well as a topline of the custom Ipsos survey results for this issue:

- 59% of Americans prefer to food shop in-store than online if both presented zero risk for COVID-19. Another 24% of Americans would shop for food in-store and online equally, and 17% would prefer to shop online. The preference for in-store shopping increases with age (77% for those ages 55+ compared to 41% of those ages 18-34), while younger consumers prefer to shop online (27% for those ages 18-34 compared to 8% for those ages 55+).
- 49% of Americans are interested in plant- and vegetable-protein-based meat substitutes. Across age groups, 12% have tried these meat substitutes and people ages 18-34 are twice as likely to be interested in trying them (51%) as those ages 55 and older (23%).
- 69% of Americans are willing to order from a virtual restaurant if they are already familiar with the brand. 56% would be willing to order from a virtual restaurant if it was a brand that hadn't had a physical location before.

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PUBLIC POLL FINDINGS AND METHODOLOGY

- 75% of Americans are very or somewhat comfortable with restaurant of food service apps knowing their preferences based on previous purchases to get faster and more customized service. 48% are comfortable sharing their customer information by face or voice recognition. 46% are comfortable with restaurant or food service apps knowing the location data on their mobile device.

- 83% of Americans who prefer to food shop online would be willing to order from a virtual grocery store restaurant, while 49% of people who prefer to food shop in-store would be.

- 56% of people prioritize available foods when grocery shopping while 44% prioritize locally grown foods. 73% of people prioritize locally grown foods while 27% of people prioritize off-season produce grown elsewhere. 54% of people prioritize health considerations while 46% of people say price is more important.

Topline Findings

These are the findings of an Ipsos poll conducted between October 22-25, 2021. For this survey, a sample of 1,171 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English. The poll has a credibility interval of plus or minus 3.3 percentage points for all respondents.

For full results, please refer to the following annotated questionnaire:

Full Annotated Questionnaire

1. Compared to before the COVID-19 pandemic began, are you currently using or doing more or less of the following?

Total More Summary

	Total (N=1171)
Cooking meals at home	55%
Buying snacks	37%
Using food delivery services	32%
Using grocery delivery services	29%
Eating fast food	28%
Buying canned food	26%
[SHOW IF 21+] Drinking alcohol you purchase from a store	24%
Buying microwave dinners	20%
Eating meals outside of the home	20%

PUBLIC POLL FINDINGS AND METHODOLOGY

1. Compared to before the COVID-19 pandemic began, are you currently using or doing more or less of the following?

Cooking meals at home	Total
A lot more	29%
A little more	27%
The same amount	37%
A little less	4%
A lot less	2%
Not applicable	1%
More (Net)	55%
Less (Net)	6%

Using food delivery services	Total
A lot more	14%
A little more	17%
The same amount	21%
A little less	6%
A lot less	6%
Not applicable	36%
More (Net)	32%
Less (Net)	12%

Eating fast food	Total
A lot more	10%
A little more	18%
The same amount	38%
A little less	18%
A lot less	12%
Not applicable	5%
More (Net)	28%
Less (Net)	29%

Drinking alcohol you purchase from a store (IF 21+)	Total (N=1124)
A lot more	9%
A little more	15%
The same amount	39%
A little less	6%
A lot less	8%
Not applicable	23%
More (Net)	24%
Less (Net)	14%

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1. Compared to before the COVID-19 pandemic began, are you currently using or doing more or less of the following?

Drinking alcohol you purchase from a restaurant (IF 21+)	**Total (N=1124)**
A lot more	4%
A little more	6%
The same amount	30%
A little less	12%
A lot less	15%
Not applicable	33%
More (Net)	10%
Less (Net)	27%

Buying snacks	**Total**
A lot more	14%
A little more	23%
The same amount	51%
A little less	7%
A lot less	3%
Not applicable	1%
More (Net)	37%
Less (Net)	10%

Buying microwave dinners	**Total**
A lot more	6%
A little more	14%
The same amount	41%
A little less	10%
A lot less	9%
Not applicable	21%
More (Net)	20%
Less (Net)	19%

Buying canned food	**Total**
A lot more	9%
A little more	17%
The same amount	58%
A little less	6%
A lot less	5%
Not applicable	5%
More (Net)	26%
Less (Net)	11%

PUBLIC POLL FINDINGS AND METHODOLOGY

1. Compared to before the COVID-19 pandemic began, are you currently using or doing more or less of the following?

Using grocery delivery services	**Total**
A lot more	13%
A little more	16%
The same amount	19%
A little less	4%
A lot less	7%
Not applicable	42%
More (Net)	29%
Less (Net)	11%

Eating meals outside of the home	**Total**
A lot more	8%
A little more	12%
The same amount	30%
A little less	21%
A lot less	25%
Not applicable	3%
More (Net)	20%
Less (Net)	46%

2. Looking into the future, do you think the following will get better or worse? (Select one for each)

Total Better Summary

	Total
The quality of the food I eat	32%
My access to restaurant take-out or delivery	31%
My access to healthy food	29%
My access to grocery delivery	28%
The environmental impact of the food I eat	25%
The cost of the food I eat	19%

The cost of the food I eat	**Total**
Will get much better	6%
Will get somewhat better	13%
Will stay the same	21%
Will get somewhat worse	37%
Will get much worse	23%
Better (Net)	19%
Worse (Net)	60%

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2. Looking into the future, do you think the following will get better or worse? (Select one for each)

The quality of the food I eat	**Total**
Will get much better	11%
Will get somewhat better	21%
Will stay the same	51%
Will get somewhat worse	13%
Will get much worse	4%
Better (Net)	32%
Worse (Net)	17%

My access to healthy food	**Total**
Will get much better	10%
Will get somewhat better	20%
Will stay the same	51%
Will get somewhat worse	15%
Will get much worse	4%
Better (Net)	29%
Worse (Net)	20%

The environmental impact of the food I eat	**Total**
Will get much better	8%
Will get somewhat better	17%
Will stay the same	54%
Will get somewhat worse	17%
Will get much worse	4%
Better (Net)	25%
Worse (Net)	20%

My access to restaurant take-out or delivery	**Total**
Will get much better	11%
Will get somewhat better	20%
Will stay the same	58%
Will get somewhat worse	9%
Will get much worse	2%
Better (Net)	*31%*
Worse (Net)	*11%*

PUBLIC POLL FINDINGS AND METHODOLOGY

2. Looking into the future, do you think the following will get better or worse? (Select one for each)

My access to grocery delivery	Total
Will get much better	11%
Will get somewhat better	17%
Will stay the same	63%
Will get somewhat worse	5%
Will get much worse	4%
Better (Net)	*28%*
Worse (Net)	*9%*

3. Given the choice between online and in-store shopping for groceries, if both presented zero risk for COVID-19, which would you prefer?

	Total
Online shopping	17%
In-store shopping	59%
Both equally	24%

4. New kinds of plant- and vegetable-protein-based meat alternatives, such as Impossible and Beyond Meat, that offer the same taste and texture of meat have become more widespread in the past few years. How interested, if at all, are you in trying these meat substitutes?

	Total
Very interested	13%
Somewhat interested	24%
Not very interested	18%
Not at all interested	33%
I already have tried these/I currently eat these	12%
Interested/Already eat (Net)	*49%*
Interested (Net)	*37%*
Not Interested (Net)	*51%*

5. [SKIP IF NOT AT ALL INTERESTED] [IF VERY, SOMEWHAT, OR NOT VERY INTERESTED IN Q4, SHOW:] What are the most important reasons why you are interested in trying meat substitutes, like Impossible or Beyond Meat, that seek to mimic the taste and texture of meat? Select all that apply.

[IF ALREADY TRIED/CURRENTLY EAT IN Q4, SHOW:] What are the most important reasons why you have already tried, or currently eat, meat substitutes, like Impossible and Beyond Meat, that seek to mimic the taste and texture of meat? Select all that apply.

	Total (N=759)
Health benefits	61%
Environmental benefits	40%
Interest in trying a new product	38%
Animal welfare benefits	34%
Looking for variety in non-meat-eating diet	29%
Food security benefits	18%
Reducing allergies or sensitivities	11%
Other	4%

6. Think about if a company started a virtual restaurant. This restaurant has no retail locations (there is no seating and no drive-thru). The restaurant will deliver hot and cold food to you that you order from a website or app. Please indicate how much do you agree or disagree with each of the following statements.

Total Agree Summary

	Total
I would be willing to order from a restaurant like this if I were already familiar with the brand (like a McDonald's or Olive Garden)	69%
I would be willing to order from a grocery store like this	61%
I would be willing to order from a restaurant like this if it was a brand that hasn't had a physical location before	56%
I would be willing to order from a convenience store like this	55%

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6. Think about if a company started a virtual restaurant. This restaurant has no retail locations (there is no seating and no drive-thru). The restaurant will deliver hot and cold food to you that you order from a website or app. Please indicate how much do you agree or disagree with each of the following statements.

I would be willing to order from a grocery store like this	**Total**
Strongly agree	22%
Somewhat agree	39%
Somewhat disagree	16%
Strongly disagree	15%
Don't know	8%
Agree (Net)	61%
Disagree (Net)	31%

I would be willing to order from a convenience store like this	**Total**
Strongly agree	20%
Somewhat agree	34%
Somewhat disagree	18%
Strongly disagree	20%
Don't know	7%
Agree (Net)	55%
Disagree (Net)	38%

I would be willing to order from a restaurant like this if I were already familiar with the brand (like a McDonald's or Olive Garden)	**Total**
Strongly agree	29%
Somewhat agree	40%
Somewhat disagree	12%
Strongly disagree	13%
Don't know	6%
Agree (Net)	69%
Disagree (Net)	25%

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6. Think about if a company started a virtual restaurant. This restaurant has no retail locations (there is no seating and no drive-thru). The restaurant will deliver hot and cold food to you that you order from a website or app. Please indicate how much do you agree or disagree with each of the following statements.

I would be willing to order from a restaurant like this if it was a brand that hasn't had a physical location before	**Total**
Strongly agree	16%
Somewhat agree	40%
Somewhat disagree	18%
Strongly disagree	15%
Don't know	12%
Agree (Net)	56%
Disagree (Net)	32%

7. Thinking about quick service restaurants, also known as fast food or fast casual restaurants, what defines convenience for you? Please rank the items from 1 to 7, using 1 to indicate the factor that is most important to you in defining convenience, and 7 for the factor that is least important in defining convenience. Please use each number from 1 to 7 only one time.

Total Summary	**Total 1+2**	**Mean**
Location	59%	2.6
Hours open	37%	3.5
Speed	31%	3.4
Drive-thru	28%	3.8
An app for ordering ahead	21%	4.7
Delivery	15%	4.9
Curbside pickup	10%	5.1

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7. Thinking about quick service restaurants, also known as fast food or fast casual restaurants, what defines convenience for you? Please rank the items from 1 to 7, using 1 to indicate the factor that is most important to you in defining convenience, and 7 for the factor that is least important in defining convenience. Please use each number from 1 to 7 only one time.

	Location
1	43%
2	16%
3	12%
4	11%
5	8%
6	5%
7	5%

	Hours open
1	12%
2	25%
3	18%
4	17%
5	12%
6	9%
7	7%

	Speed
1	12%
2	19%
3	26%
4	18%
5	12%
6	8%
7	6%

	Drive-thru
1	12%
2	16%
3	18%
4	19%
5	14%
6	14%
7	8%

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GAME CHANGERS

PUBLIC POLL FINDINGS AND METHODOLOGY

7. Thinking about quick service restaurants, also known as fast food or fast casual restaurants, what defines convenience for you? Please rank the items from 1 to 7, using 1 to indicate the factor that is most important to you in defining convenience, and 7 for the factor that is least important in defining convenience. Please use each number from 1 to 7 only one time.

	An app for ordering ahead
1	11%
2	10%
3	8%
4	12%
5	18%
6	16%
7	25%

	Delivery
1	8%
2	7%
3	10%
4	12%
5	14%
6	19%
7	29%

	Curbside pickup
1	4%
2	7%
3	8%
4	11%
5	22%
6	29%
7	20%

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PUBLIC POLL FINDINGS AND METHODOLOGY

8. Thinking about grocery stores, what are the most important factors in defining convenience for you? Please rank the items from 1 to 7, using 1 to indicate the factor that is most important to you in defining convenience, and 7 for the factor that is least important in defining convenience. Please use each number from 1 to 7 only one time.

Total Summary	Total 1+2	Mean
Location	69%	2.3
Hours open	52%	3.1
Speed	23%	3.6
An app for ordering ahead	17%	4.6
Delivery	15%	4.9
Drive-thru	12%	5
Curbside pickup	11%	4.7

	Location
1	52%
2	18%
3	9%
4	8%
5	6%
6	4%
7	4%

	Hours open
1	14%
2	38%
3	15%
4	10%
5	10%
6	8%
7	5%

	Speed
1	7%
2	16%
3	36%
4	13%
5	13%
6	9%
7	5%

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8. Thinking about grocery stores, what are the most important factors in defining convenience for you? Please rank the items from 1 to 7, using 1 to indicate the factor that is most important to you in defining convenience, and 7 for the factor that is least important in defining convenience. Please use each number from 1 to 7 only one time.

	An app for ordering ahead
1	9%
2	8%
3	10%
4	19%
5	17%
6	15%
7	22%

	Delivery
1	8%
2	7%
3	9%
4	13%
5	16%
6	22%
7	25%

	Drive-thru
1	4%
2	7%
3	8%
4	15%
5	18%
6	23%
7	24%

	Curbside pickup
1	4%
2	7%
3	12%
4	22%
5	21%
6	19%
7	15%

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9. If you could buy prepared foods for take home or delivery from a grocery store, would the following make you more likely or less likely to purchase from one of these outlets?

Total More Likely Summary

	Total
Ability to avoid the regular check-out line	72%
Ability to order pre-made items for heating up later, at your convenience	68%
Ability to order a meal along with a few a grocery items	66%
Ability to get at curbside pickup or drive-thru	64%
Ability to order for delivery via an app	58%

Ability to order for delivery via an app	**Total**
Much more likely	24%
Somewhat more likely	34%
Somewhat less likely	9%
Much less likely	6%
Makes no difference	27%
More Likely (Net)	58%
Less Likely (Net)	33%

Ability to get at curbside pickup or drive-thru	**Total**
Much more likely	24%
Somewhat more likely	40%
Somewhat less likely	8%
Much less likely	4%
Makes no difference	23%
More Likely (Net)	64%
Less Likely (Net)	28%

Ability to avoid the regular check-out line	**Total**
Much more likely	36%
Somewhat more likely	36%
Somewhat less likely	6%
Much less likely	2%
Makes no difference	20%
More Likely (Net)	72%
Less Likely (Net)	22%

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9. If you could buy prepared foods for take home or delivery from a grocery store, would the following make you more likely or less likely to purchase from one of these outlets?

Ability to order a meal along with a few a grocery items	**Total**
Much more likely	29%
Somewhat more likely	37%
Somewhat less likely	9%
Much less likely	4%
Makes no difference	22%
More Likely (Net)	66%
Less Likely (Net)	26%

Ability to order pre-made items for heating up later, at your convenience	**Total**
Much more likely	23%
Somewhat more likely	44%
Somewhat less likely	8%
Much less likely	4%
Makes no difference	21%
More Likely (Net)	68%
Less Likely (Net)	25%

10. To what degree are you comfortable with sharing the following data or information in advance with restaurant or food service apps to get faster and more customized service?

Total Comfortable Summary

	Total
Know preferences based on previous purchases	75%
Know my beverage choices	74%
Know food allergies and sensitivities	71%
Know the location data on my mobile device	46%
Know my customer information by face or voice recognition	48%

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10. To what degree are you comfortable with sharing the following data or information in advance with restaurant or food service apps to get faster and more customized service?

Know my customer information by face or voice recognition	**Total**
Very comfortable	18%
Somewhat comfortable	30%
Not very comfortable	22%
Not comfortable at all	21%
Don't know	9%
Comfortable (Net)	48%
Not Comfortable (Net)	43%

Know the location data on my mobile device	**Total**
Very comfortable	19%
Somewhat comfortable	27%
Not very comfortable	24%
Not comfortable at all	22%
Don't know	8%
Comfortable (Net)	46%
Not Comfortable (Net)	46%

Know preferences based on previous purchases	**Total**
Very comfortable	30%
Somewhat comfortable	45%
Not very comfortable	12%
Not comfortable at all	8%
Don't know	5%
Comfortable (Net)	75%
Not Comfortable (Net)	20%

Know food allergies and sensitivities	**Total**
Very comfortable	37%
Somewhat comfortable	34%
Not very comfortable	11%
Not comfortable at all	9%
Don't know	9%
Comfortable (Net)	71%
Not Comfortable (Net)	20%

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10. To what degree are you comfortable with sharing the following data or information in advance with restaurant or food service apps to get faster and more customized service?

Know my beverage choices	**Total**
Very comfortable	32%
Somewhat comfortable	41%
Not very comfortable	12%
Not comfortable at all	6%
Don't know	7%
Comfortable (Net)	74%
Not Comfortable (Net)	19%

11. For each of the following pairs, please select the one item that you feel is more important to you when purchasing groceries.

	Total
Locally grown	44%
Readily available	56%

	Total
Off-season produce (grown elsewhere)	27%
Locally grown	73%

	Total
Major brands	53%
Private-label or store brands	47%

	Total
Price	46%
Health considerations	54%

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11. For each of the following pairs, please select the one item that you feel is more important to you when purchasing groceries.

	Total
Price	62%
Where/how the food was sourced	38%

	Total
Price	52%
How the food is processed	48%

12. Which types of products listed below have you recently (within the past 3 months) purchased a product that was labeled as sustainable or ethically sourced? Select all that apply.

	Total
Food	56%
Household products	37%
Vitamins/minerals/supplements	31%
Beauty products	28%
Pet products	22%
Fashion/retail	18%
OTC products	14%
None of these	32%

13. When purchasing food items specifically, how important are sustainability and ethical practices to you?

	Total
Much less important than other factors (such as price, size, product quality, etc.)	18%
Slightly less important than other factors	11%
About as important as other factors	39%
Slightly more important than other factors	20%
Much more important than other factors (such as price, size, product quality, etc.)	12%

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14. Do you suffer from a bad or unpleasant physical reaction after consuming certain foods, or avoid certain foods because of the bad or unpleasant physical reaction they might cause?

	Total
Yes	24%
No	70%
Don't know	5%
Prefer not to say	1%

About the Study

These are some of the findings of an Ipsos poll conducted between October 22-25, 2021. For this survey, a sample of 1,171 adults age 18+ from the continental U.S., Alaska, and Hawaii was interviewed online in English.

The sample for this study was randomly drawn from Ipsos' online panel (see link below for more info on "Access Panels and Recruitment"), partner online panel sources, and "river" sampling (see link below for more info on the Ipsos "Ampario Overview" sample method) and does not rely on a population frame in the traditional sense. Ipsos uses fixed sample targets, unique to each study, in drawing a sample. After a sample has been obtained from the Ipsos panel, Ipsos calibrates respondent characteristics to be representative of the U.S. Population using standard procedures such as raking-ratio adjustments. The source of these population targets is U.S. Census 2016 American Community Survey data. The sample drawn for this study reflects fixed sample targets on demographics. Posthoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.
Statistical margins of error are not applicable to online non-probability polls. All sample surveys and polls may be subject to other sources of error, including, but not limited to coverage error and measurement error. Where figures do not sum to 100, this is due to the effects of rounding. The precision of Ipsos online polls is measured using a credibility interval. In this case, the poll has a credibility interval of plus or minus 3.3 percentage points for all respondents. Ipsos calculates a design effect (DEFF) for each study based on the variation of the weights, following the formula of Kish (1965). This study had a credibility interval adjusted for design effect of the following (n=1,171, DEFF=1.5, adjusted Confidence Interval=+/-4.8 percentage points).

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PUBLIC POLL FINDINGS AND METHODOLOGY

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Our passionately curious research professionals, analysts and scientists have built unique multi-specialist capabilities that provide true understanding and powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. We serve more than 5000 clients across the world with 75 business solutions.

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