Global Views On Food – 2018

What are the world's food habits?

IPSOS GLOBAL ADVISOR

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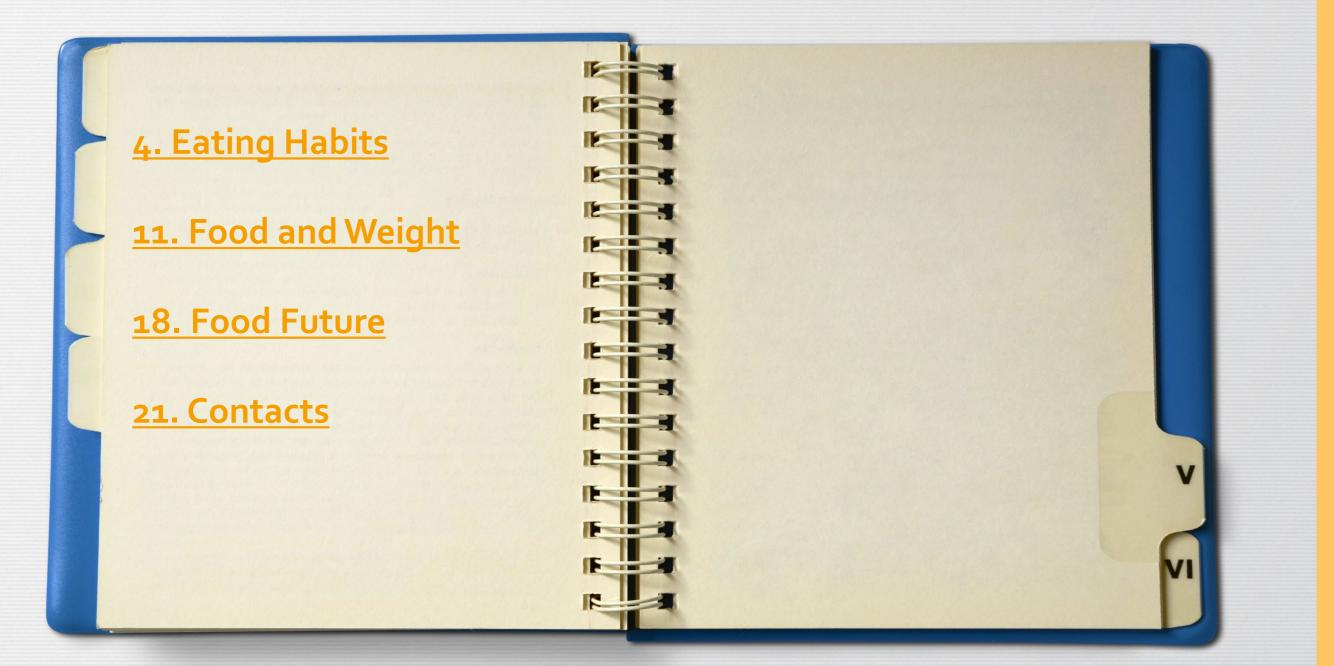
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- The findings come from surveys conducted between August 24 September 7, 2018 on the Ipsos Global Advisor platform using the Ipsos Online Panel system with 20,788 adults across 29 countries: Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Romania, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey, and the U.S.
- All survey respondents are aged 18-64 in Canada and the U.S. and 16-64 in all other countries.
- The sample size per country in each survey is approximately N=1,000 for Australia, Brazil, Canada, China, France, Germany, Great Britain, India, Italy, Japan, Spain, and the U.S. and approximately N=500 for Argentina, Belgium, Chile, Colombia, Hungary, Malaysia, Mexico, Peru, Poland, Romania, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Sweden, and Turkey.
- Weighting has been employed to balance demographics and ensure that the sample's composition reflects that of the adult population according to the most recent country census data.

- A survey with an unweighted probability sample of this size would have an estimated margin of error of +/- 3.1 percentage points for a sample of 1,000 and an estimated margin of error of +/- 4.5 percentage points for a 500 sample 19 times out of 20.
- In 17 of the countries surveyed ,internet penetration is sufficiently high to think of the samples as representative of the national population within the age ranges covered: Argentina, Australia, Belgium, Canada, France, Germany, Hungary, Italy, Japan, Poland, Serbia, South Korea, Spain, Sweden, Great Britain, and the U.S.
 Brazil, Chile, China, Colombia, India, Malaysia, Mexico, Romania, Russia, Peru, Saudi Arabia, South Africa, and Turkey have lower levels of internet penetration. Samples from those countries should not be considered to be fully nationally representative, but instead to represent a more affluent, connected population, representing an important and emerging middle class.
- Results may not always sum to 100% or may be 1 point higher/lower than the actuals due to rounding, multiple responses or the exclusion of don't knows or not stated responses.



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Eating Habits

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Eating Organic

- India and China are the only countries for whom more than half the population eats exclusively organic food.
- In general, the most developed countries are least likely to eat exclusively organic.

Q1. To what extent do you agree or disagree with the following statements? – I only eat organic foods.

	Agree	Don't know	Disagree	Net score (% agree minus % disagree)
World	29%	5%	66%	-37%
India		57%	40%	17%
China		55%	42%	— 13%
Peru		46%	51%	-5% 🗖
Turkey		44%	52%	-8% 🗖
Russia		<mark>42%</mark> 7%	51%	-9% 🗖
Saudi Arabia		<mark>42%</mark> 5%	53%	-11% 🗖
Romania		39%	57%	-18%
Chile		38%	58%	-20%
Colombia		37% 5%	59%	-22%
Mexico		37%	60%	-23%
Brazil	309		66%	-36%
Argentina	29%	5%	66%	-37%
South Africa	29%		68%	-39%
South Korea	27%		72%	
Italy	25%		70%	-45%
Malaysia	25%		73%	-45%
Spain	24% 5%		71%	-48%
Sweden	24%		75%	-47%
France	23%		73%	-51%
Germany	21%		77%	-50%
Poland	21% 7%		72%	-56%
Australia	19%		80%	-51%
Serbia	19%	43%	36%	-61%
US	19%		78%	-17%
Hungary	16%		82%	-59%
Belgium	15% 6%		79%	-66%
Canada	15%		84%	-64%
Japan	13% 5%		82%	-69%
Great Britain	12%		86%	-69%
				-74%

Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

When this question was asked in Serbia, respondents were given the option to not provide an answer.

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GMOs

• About half the world is opposed to genetically modified food.

• Western, developed countries are more likely to be opposed to GMOs.

Q1. To what extent do you agree or disagree with the following statements? – I would never eat a genetically modified food.

World 55% 9% Turkey 76% 5% Romania 73% 5% Serbia 70% 6% Italy 67% 9% India 65% 6% Russia 65% 5% China 65% 5% France 62% 11% Malaysia 60% 7% South Korea 60% 5% Saudi Arabia 59% 8% Hungary 58% 9% Chile 57% 9%	36% 19% 19% 57% 22% 51% 20% 50%
Romania73%5%Serbia70%6%Italy67%9%India65%6%Russia65%5%China64%	22% 51% 20% 50%
Serbia 70% 6% Italy 67% 9% India 65% 6% Russia 65% 5% China 64%	20%
Italy67%9%India65%6%Russia65%5%China64%5%France62%11%Malaysia60%7%South Korea60%5%Saudi Arabia59%8%Hungary58%9%	j;;;
India65%6%Russia65%5%China64%64%France62%11%Malaysia60%7%South Korea60%7%Saudi Arabia59%8%Hungary58%9%	
Russia65%China64%France62%Malaysia60%South Korea60%Saudi Arabia59%Hungary58%	24% 43%
China64%France62%11%Malaysia60%7%South Korea60%50%Saudi Arabia59%8%Hungary58%9%	28%
France62%11%Malaysia60%7%South Korea60%5%Saudi Arabia59%8%Hungary58%9%	30%
Malaysia60%7%South Korea60%60%Saudi Arabia59%8%Hungary58%9%	32%
South Korea60%Saudi Arabia59%Hungary58%9%	26%
Saudi Arabia59%8%Hungary58%9%	33%
Hungary 58% 9%	37% 23%
	33%
	33%
Chile 57% 9%	34% 23%
Germany 57% 7%	36%
Mexico 57% 8%	36%
Peru 56% 8%	35%
Colombia 55% 11%	34%
Spain 53% 15%	32%
Japan 51% 5%	44% ■ 7%
Argentina 50% 11%	39%
Belgium 45% 21%	34%
Sweden 45% 12%	43%
Poland 44% 19%	38% ■ 6%
South Africa 43% 8%	50% -7% ■
Australia 41% 11%	47% _6% ■
Brazil 41% 10%	48% 7% ■
Canada 38% 9%	
Great Britain 38% 15%	52% ₋₁₄ % 💻
US 34% 10% Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018	52% -14% ■ 47% -9% ■

Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 - Sept. 7, 2018

Plant-Based Substitutes

 A large majority of Chinese respondents are willing to eat substitute meat with a plant-based substitute.

Q1. To what extent do you agree or disagree with the following statements? – I would eat a plant-based substitute for meat.

	Agree	Don't know	Disagree	Net score minus % d	-
World		42% 7%	51%	-9% 🗖	
China			<mark>73%</mark> 24%		49%
India		63%	32%		31%
Mexico		58%	38%		20%
Colombia		5 6% 6%	38%		18%
Peru		55% 5%	41%		14%
Chile		51%	45%		6%
Great Britain		49% 7%	44%		5%
Sweden		48% 6%	46%		2%
Brazil		47% 8%	46%		1%
Malaysia		<mark>44</mark> % 5%	51%	-7%	
Canada		43% 5%	52%	-9% 🗖	
South Africa		43%	54%	-11% 🗖	
Argentina		40% 7%	53%	-13% 🗖	
Italy		<mark>40%</mark> 8%	52%	-12% 🗖	
Saudi Arabia		40%	56%	-16% 💻	
Australia		39% 5%	55%	-16% 🗖	
Russia		38% 5%	58%	-20%	
Turkey		38%	62%	-24%	
US		38% 5%	56%	-18% 💻	
Germany		37%	60%	-23%	
Spain		37% 8%	55%	-18%	
South Korea	3	<mark>5%</mark>	64%	-29%	
Belgium	34	<mark>%</mark> 9%	57%	-23%	
Poland	34	<mark>%</mark> 22%	44%	-10%	
France	31%	7%	63%	-32%	
Japan	31%	8%	62%	-31%	
Hungary	30%	8%	62%	-32%	
Serbia	27%		45% 27%		0%
Romania	26% Base 1/ rop online adults a	ged 16-64 across 29 countries, Aug. 24 — Sept	7.2018	-46%	

Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

Locally Grown Food

 More than half of all respondents in every country surveyed would prefer to eat local food at the expense of having lots of food options.

Q1. To what extent do you agree or disagree with the following statements? — I prefer to eat food produced locally, even if that means I have fewer foods to choose from.

	Agree	Don't know	Disagree	Net score (% agree minus % disagree)
World		64%	33%	31%
Romania			79% 19%	60%
India		74	<mark>%</mark> 24%	50%
Turkey		73	26%	47%
China		71%	27%	44%
Sweden		71%	27%	44%
Italy		70%	26%	44%
Malaysia		70%	28%	42%
Hungary		69%	29%	40%
Mexico		69%	28%	41%
Russia		69%	29%	40%
Spain		67%	29%	38%
France		66%	30%	36%
Saudi Arabia		66%	31%	35%
Serbia		64%	.0% 25%	39%
Colombia		63%	35%	28%
Argentina		62%	34%	28%
Canada		62%	35%	27%
Chile		61%	36%	25%
Germany		61%	37%	24%
Peru		61%	34%	27%
Poland		61% 7%	32%	29%
Australia		60%	35%	25%
South Africa		60%	38%	22%
Brazil		54% 5%	41%	13%
South Korea		54%	44%	10%
US		53% 5%	42%	— 11%
Japan		52%	44%	8 %
Belgium		51% 6%	43%	8 %
Great Britain	Base 17 soa online adu	51% 6% 51% 6%	43%	8%

Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 - Sept. 7, 2018

Vegetarianism

- India is the only country where more citizens are willing to eat vegetarian than not.
- Generally, people would much prefer a diet that includes some type of meat.

Q1. To what extent do you agree or disagree with the following statements? – I prefer to not eat any type of meat, poultry, or fish.

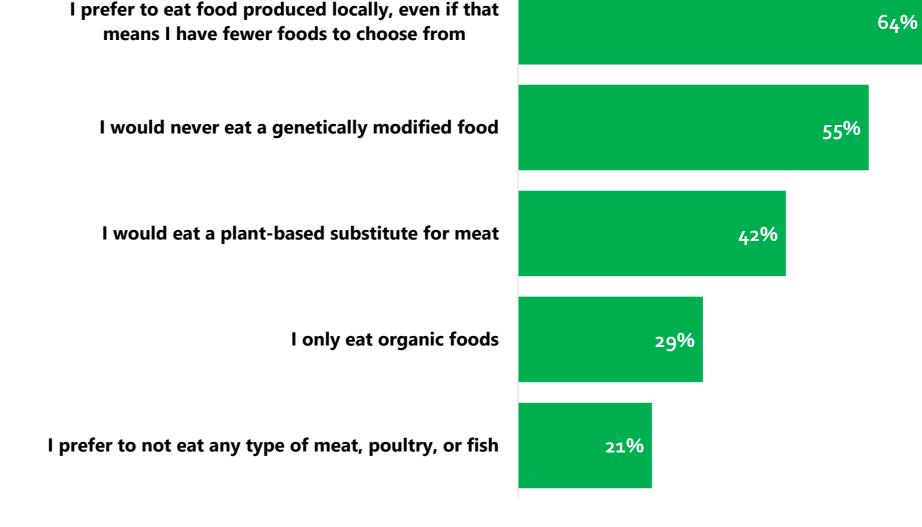
	Agree	Don't know	Disagree	Net score (% agree minus % disagree)
World	21%		75%	-54%
India		56%	42%	— 14%
China	3	1 <mark>% -</mark>	67%	-36%
Saudi Arabia	30	<mark>%</mark>	68%	-38%
France	26%		70%	-44%
Mexico	24%		74%	-50%
Sweden	24%		75%	-51%
Turkey	24%		74%	-50%
Chile	23%		75%	-52%
Italy	23%		73%	-50%
Brazil	22%		75%	-53%
Peru	22%		75%	-53%
Australia	21%		77%	-56%
Germany	21%		77%	-56%
Argentina	20%		77%	-57%
Spain	20%		79%	-59%
Belgium	19%		78%	-59%
Colombia	19%		79%	-60%
Great Britain	19%		80%	-61%
South Africa	18%		81%	-63%
South Korea	18%		81%	-63%
Malaysia	17%		82%	-65%
US	16%		82%	-66%
Canada	15%		84%	-69%
Poland	15% 5%			-64%
Japan	13%		84%	
Romania	12%		86%	
Russia	11%		88% -	
Serbia	11% 68%		19%	-8% 🗖
Hungary	8%	ults aged 16-64 across 29 countries. Aug. 24 - Sept. 7.	91%-8	33%

Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

World Summary

The results of this survey suggest that the world would be more accepting of a more sustainable food market that includes local grown, natural food items.

Q1. To what extent do you agree or disagree with the following statements? – Agree world summary.



Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018 When this question was asked in Serbia, respondents were given the option to not provide an answer.

Agree

Food and Weight

23 34 35

1 INCH

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Weight

 Most across the globe are content with their current weight, though majorities in the U.S., Chile, Hungary, South Korea, and Japan are not.

Q2. To what extent do you agree or disagree with the following statements? – I am content with my current weight.

	Agree	Don't know		Disagree	Net score (% agree minus % disagree)
World		55%		43%	1 2%
India			74%	24%	50%
China			69%	30%	39%
Colombia		63%	6	36%	27%
South Africa		61%		38%	23%
Mexico		60%		40%	20%
Peru		60%		39%	21%
Italy		59%		39%	20%
Russia		59%		40%	19%
Saudi Arabia		59%		39%	20%
Argentina		58%		40%	18%
Malaysia		58%		40%	18%
Romania		57%		42%	15%
Turkey		55%		44%	11%
Brazil		54%		43%	11%
Serbia		54%	18%	29%	25%
Australia		53%		46%	7 %
Germany		53%		45%	8 %
Poland		53% 5%		43%	10%
Belgium		52%		46%	6 %
Canada		52%		47%	5 %
Spain		52%		46%	6 %
Sweden		52%		47%	5 %
France		51%		46%	5 %
Great Britain		51%		47%	■ 4%
Chile		47%		52%	-5% 🗖
US		47%		53%	-6%
Hungary		45%		53%	-8%
South Korea		42%		56%	-14%
Japan	3	<mark>5%</mark>		62%	27%

Trying a Diet

- Globally, half have tried a diet to lose weight.
- Americans closely mirror the global trend.

Q2. To what extent do you agree or disagree with the following statements? – I have tried a diet to lose weight.

	Agree	Don't kno	w	Disagree	Net score minus %	e (% agree disagree)
World		51%		46%		5 %
Saudi Arabia			63%	34%		29%
Malaysia			62%	37%		25%
South Korea			62%	37%		25%
Peru		(50%	38%		22%
Australia		5:	9 %	40%		19%
Brazil		57 ⁹	6	40%		17%
India		57%		42%		15%
Chile		56%		42%		14%
South Africa		55%		44%		11%
Argentina		54%		43%		11%
Great Britain		54%		44%		10%
Mexico		54%		45%		9%
China		53%		47%		6%
US		53%		46%		7%
Japan		51%		46%		5 %
Canada		50%		49%		1%
Italy		49%		47%		∎ 2%
Russia		49%		49%		0%
Spain		49%		48%		1%
Turkey		48%		50%	-2%	
Colombia		46%		52%	-6%	
Poland		46% 5%		50%	-4%	
Belgium		44%		53%	-9%	
Hungary		44%		52%	-8%	
Germany		43%		55%		
Sweden		42%		57%	-15%	
Romania		40%		56%		
France		37%		61%	-24%	
Serbia		36%		45% 19%		17%

Successful Dieting?

Majorities in all countries, except Malaysia and Japan, believe diets fail.

Canadians are the most • skeptical, closely followed by those in Germany and Russia.

Q2. To what extent do you agree or disagree with the following statements? - I believe that most diet plans ultimately fail.

	Agree	Don't know	Disagree		Net score (% agree minus % disagree)
World		61% 5 ⁹	6	34%	27%
Canada			75% 5%	20%	55%
Germany			73%	23%	50%
Russia			73%	23%	50%
Australia			71% 5%	24%	47%
Spain			70%	26%	44%
Great Britain			5 <mark>9%</mark> 8%	23%	46%
US		6	9% 6%	26%	43%
Belgium		6	<mark>8%</mark> 6%	26%	42%
France		669	6 5%	29%	37%
Sweden		669	6 7%	27%	39%
China		65%		32%	33%
South Africa		64%		33%	31%
Chile		63%		33%	30%
Poland		63%	11%	26%	37%
Hungary		59% 7	%	33%	26%
India		59%		38%	21%
Saudi Arabia		59%		38%	21%
Serbia		58%	15%	27%	31%
South Korea		57%		41%	16%
Turkey		57% 6%		38%	19%
Italy		56% 9%		35%	21%
Peru		56%		41%	15%
Romania		56% 5%		39%	17%
Brazil		53% 5%		42%	— 11%
Colombia		53%		43%	10%
Argentina		51%		45%	6 %
Mexico		51%		46%	5 %
Malaysia		47% 5%		48%	-1%
Japan		35% 11%		55% -20	0%

Exercising to Eat

- Globally, people are nearly split, with slightly more disagreeing that they exercise so they don't have to watch what they eat.
- In the U.S., one in three agrees that they exercise to not watch what they eat.

Q2. To what extent do you agree or disagree with the following statements? – I exercise so that I don't have to watch what I eat.

	Agree	Don't know	Disagree	Net score (% agree minus % disagree)
World		45%	51%	-6%
India		67%	32%	35%
Malaysia		60%	38%	22%
Colombia		56%	42%	14%
Mexico		54%	45%	9%
Saudi Arabia		54%	43%	11%
Turkey		53%	45%	— 8%
Peru		51%	47%	4 %
Romania		51%	47%	4 %
Argentina		50%	48%	2%
South Africa		48%	51%	-3%
Hungary		47%	49%	-2%
Japan		47%	50%	-3%
Brazil		46%	51%	-5% 🗖
Spain		46%	52%	-6% 🗖
Australia		43%	55%	-12%
Chile		43%	54%	-11%
China		43%	56%	-13%
Russia		43%	53%	-10%
Belgium		42%	54%	-12%
France		41%	56%	-15%
Germany		41%	56%	-15%
Great Britain		41%	56%	-15%
Italy		41%	56%	-15%
Sweden		41%	57%	-16%
Poland	36%	6%	58%	
Canada	34%		64%	-30%
US	34%		64%	-30%
South Korea	31%		68%	-37%
Serbia	24%	41%	35%	

Eating Well vs. Gaining Weight

 More than six in ten globally agree eating well is more important than being thin, including nearly twothirds of Americans

Q2. To what extent do you agree or disagree with the following statements? – I would rather eat well than be thin.

	Agree	Don't know		Disagree	Net score (% agree minus % disagree)
World		62	2%	34%	28%
South Korea			78%	20%	58%
India			77%	20%	57%
Japan			72%	24%	48%
Saudi Arabia			70%	28%	42%
Australia			69%	28%	41%
South Africa			69%	29%	40%
Great Britain			68% 5%	27%	41%
Turkey			68%	30%	38%
Canada			67%	30%	37%
Sweden			67%	29%	38%
Colombia			66%	33%	33%
Spain			66%	31%	35%
Argentina			65%	32%	33%
Peru		6	3%	35%	28%
Russia		6	3%	33%	30%
US		6	3%	34%	29%
Italy		59%	5%	36%	23%
Belgium		58%	6%	36%	22%
China		58%		40%	18%
Brazil		57%		40%	17%
Chile		56%		41%	15%
Malaysia		56%		42%	14%
Mexico		56%		42%	14%
Hungary		55%		42%	13%
France		53% 5%		42%	— 11%
Poland		52% 1	0%	37%	15%
Germany		51% 6%		43%	8 %
Romania		44%		55%	-11%
Serbia		40% 21 ⁰	6	39%	1%

World Summary

Slightly more than half of the world's respondents appear content with their weight and relationship with food.

Q2. To what extent do you agree or disagree with the following statements? – Agree world summary.

A	gree
I would rather eat well than be thin	62%
I believe that most diet plans ultimately fail	61%
I am content with my current weight	55%
I have tried a diet to lose weight	51%
l exercise so that I don't have to watch what I eat	45%

Food Future

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Food Cost

- About half the world expects food prices to increase in the future.
- China, India, and Saudi
 Arabia are the most
 optimistic countries
 when considering the
 future of food costs.

Q3. Looking into the future, do you think the following will get better or worse? – The cost of the food I eat.

	Better	Stay the S	ame	Worse		Net score (% be minus % worse)	
World	21%	31%			48%	-27%	
China		50%		36%	14%		36%
India		47%	27%		26%		21%
Saudi Arabia		43%	31%		26%		17%
Malaysia	29%		40%		31%	-2%	
Mexico	29%	25%			46%	-17%	
Peru	29%		36%		35%	-6% 🗖	
Brazil	27%	3:	2%		41%	-14%	
Poland	24%		42%		34%	-10% 🗖	
South Korea	23%		50%		27%	-4% 🛽	
Chile	21%	34%			45%	-24%	
Colombia	21%	22%			57%	-36%	
Italy	21%		42%		37%	-16%	
Argentina	19%	23%			59%	-40%	
Serbia	19%	30%			51%	-32%	
Sweden	19%	31%			50%	-31%	
France	18%	29%			53%	-35%	
South Africa	17% 13%				70%	-53%	
Spain	17%	L	₊ 3%		40%	-23%	
US	17%	33%			50%	-33%	
Turkey	15%	24%			61%	-46%	
Romania	14%	26%			60%	-46%	
Germany	12%		52%		36%	-24%	
Russia		2%			65%	-53%	
Australia	11%	31%			59%	-48%	
Belgium	10%	30%			60%	-50%	
Hungary	10% 23 ⁰	%			67%	-57%	
Canada	9% 21%				71%	-62%	
Great Britain	<u>9%</u> 24 ⁰				67%	-58%	
Japan	9%	34%			57%	-48%	

Food Quality

- A plurality of the world's citizens believe food quality Saud will remain as is today.
- Half of all Turkish respondents expect food quality to worsen, the most pessimistic country.
- China, India, and Saudi continue to show as the most optimistic country when considering the future of their food.

Q3. Looking into the future, do you think the following will get better or worse? – The quality of the food I eat.

	Better	Stay the Sar	ne	Worse			core (% better s % worse)
World	33%		42%		25%		8%
China			65%	29%	6%		59%
India		59 ⁹	6	23%	17%		42%
Saudi Arabia		49%		36%	14%		35%
Peru		45%	33%		22%		23%
Malaysia		44%		41%	16%		28%
Mexico		39%	34%		27%		12%
Brazil		38%	38%		24%		14%
Colombia		38%	34%		28%		10%
Poland		38%		45%	17%		21%
Chile		37%	38%		25%		12%
Sweden	3	5%	41%		23%		13%
US	35	<mark>%</mark>		51%	14%		21%
South Africa	34%	6	30%		36%	-2%	
Italy	33%		42%		25%		8%
Serbia	32%		39%		30%		2%
South Korea	32%			57%	11%		21%
France	30%		39%		31%	-1%	
Australia	27%		5	4%	18%		9%
Argentina	26%		42%		33%	-7% 🗖	
Canada	25%		51%		23%		2%
Spain	25%		50%		25%		0%
Belgium	23%		52%		25%	-2%	
Turkey	23%	28%			49%	26%	
Germany	22%			63%	15%		7%
Great Britain	20%		6	2%	18%		2%
Russia	20%	4	.2%			-18%	
Romania	19%	38%				24%	
Japan	18%		57%		25%	-7% 🗖	
Hungary	17%	43	%		39%	-22%	

Healthy Food Access

 1 in 6 people in the world rely on imports to feed them.

Among countries polled, the US, China, Germany, Japan, and the United Kingdom top the list as the countries that import the most food.

Q3. Looking into the future, do you think the following will get better or worse? – My access to healthy food.

	Better	Stay the Same	W	orse	Net score (% better minus % worse)
World	36%	6	42%	22%	— 14%
China		639	6	32% 6%	57%
India		59%	27%	14%	45%
Saudi Arabia		55%	29%	15%	40%
Peru		49%	32%	19%	30%
Malaysia		47%	409	6 13%	34%
South Korea		47%		45% 7%	40%
Brazil		42%	35%	22%	20%
Serbia		42%	44%	14%	28%
Sweden		42%	42%	16%	26%
Colombia		40%	30%	30%	10%
Italy		40%	42%	18%	22%
Chile		39%	35%	26%	13%
Mexico	8	39%	36%	25%	14%
Poland	38	8%	50	12%	26%
South Africa	35%		31%	34%	1%
US	34%		50%	16%	18%
France	33%		41%	26%	7 %
Argentina	31%		39%	30%	1%
Spain	30%		51%	19%	11%
Australia	28%		55%	17%	11%
Hungary	28%	36	%	37%	-9% 💻
Belgium	27%		51%	23%	■ 4%
Canada	25%		50%	25%	0%
Turkey	25%	22%		53%	28%
Germany	24%			66% 10%	14%
Russia	23%		45%	32%	-9% 💻
Romania	21%	L	4%	35%	-14% 💻
Great Britain	20%		63%	17%	3%
Japan	18%		65%	17%	1%

Food and the Environment

- Nearly half of the world expects their food to remain as sustainable as it is today.
- However, an equal number of respondents believe environmental food sustainability will get better as who believe it will get worse.

Q3. Looking into the future, do you think the following will get better or worse? – The environmental impact of the food I eat.

	Better	Stay the Same	Worse		Net score minus % v	•
World	27%	44%	0	29%	-2%	
China		54%	36%	10%		44%
India		48%	31%	21%		27%
Saudi Arabia		46%	35%	19%		27%
Sweden		46%	35%	18%		28%
Peru	39	<mark>%</mark> 32 ⁹	6	28%		11%
Poland	33%		58%	9%		24%
Mexico	32%	32%		36%	-4% 🗖	
Brazil	30%	420	6	28%		2%
Chile	29%	36%		35%	-6% 🗖	
France	29%	42%		29%		0%
Colombia	28%	35%		37%	-9% 💻	
Italy	28%		48%	24%		4%
South Korea	28%		53%	20%		8%
Malaysia	26%		49%	24%		2%
South Africa	26%	29%		45%	-19%	
US	25%		54%	21%		4%
Spain	23%	5	0%	26%	-3%	
Argentina	22%	44%		34%	-12%	
Belgium	21%	50%		29%	-8% 🗖	
Serbia	21%	36%		43%	-22%	
Australia	20%		54%	25%	-5% 🗖	
Germany	19%		68%	13%		6%
Great Britain	19%		56%	25%	-6% 🗖	
Canada	18%	52%		31%	-13%	
Hungary	16%	45%		39%		
Romania	16%	42%		41%	-25%	
Russia	16%	43%		41%		
Turkey	16%	37%		48%	-32%	
Japan	10%	46%			-34%	

World Summary

- At best, a third of the world expects the future of food to improve.
- Just one-fifth expect food to get cheaper in the future.

Q3. Looking into the future, do you think the following will get better or worse? – Better world summary.

Be	etter
My access to healthy food	36%
The quality of the food I eat	33%
The environmental impact of the food I eat	27%
The cost of the food I eat	21%

Meal Preparation

- Dining out rather than preparing food at home is often one of the first things to decrease when economies worsen.
- Over the next year, just 8% of respondents across the world think they will be preparing food less frequently at home.

Q4. How do you think the following will change over the next year? – Preparing meals at home.

	More frequently	About the same	Less frequently	Net score (% more minus % less)
World	38	8%	52%	8%
Mexico		61%	32%	6% 55%
Argentina		59%	34%	5% 54%
Colombia		59%	34%	6% 53%
Peru		57%	29% 1	46%
South Africa		55%	36%	8% 47%
Chile		54%	37%	7% 47%
Turkey		49%	41%	9% 40%
India		48%	41%	9% 39%
Malaysia		48%	42%	7% 41%
Russia		48%	48%	45%
China		47%	42% 1	.0% 37%
Saudi Arabia		43%		31%
Brazil	369	⁄0	53%	28%
Spain	36%	6 .	57%	5% 31%
Italy	32%		58%	5% 27%
Australia	31%		64%	4% 27%
Serbia	31%		63%	5% 26%
US	31%		61%	5% 26%
Canada	30%		65%	27%
Belgium	29%		65%	26%
France	29%		60%	5% 24%
Germany	29%		63%	5% 24%
Romania	28%		54% 1	11%
Sweden	28%		63%	
Hungary	24%		52% 2	20% 4 %
Great Britain	23%			20%
Poland	22%		60%	10%
Japan	18%		71%	6% 12%
South Korea	17%		67%	-3% - 4%

Meal Delivery

- Most of the world expects meal delivery to remain the same in the next year.
- Hungarians are most optimistic that they'll be getting most food delivered.
- Germany, Great Britain, and Japan, seem to have reached a saturation point of meal delivery.

Q4. How do you think the following will change over the next year? – Having meals delivered to my home.

	More frequently	About the same	Less frequently	Net score (9 minus % les	
World	16%	44%	31	-15%	
Hungary	39	9 <mark>%</mark>	44% 13	%	26%
India	389	<mark>%</mark>	36% 23	%	15%
Saudi Arabia	34%		39% 21	.%	13%
Romania	31%	36%	28	%	3%
China	29%	429	6 26	i%	3%
Poland	25%		49% 15	%	10%
South Korea	22%		52% 23	-1%	
Mexico	20%	38%	37	-17%	
South Africa	20%	32%	40	-20%	
Peru	19%	33%	41	.% -22%	
Chile	17%	38%	35	-18%	
Brazil	16%	47%	29	-13%	
Colombia	16%	38%	42	-26%	
Turkey	14%	42%	41	.% -27%	
Malaysia	13%	37%	43	-30%	
US	12%	54	4% 22	-10% 💻	
Argentina	11%	32%	51	.% - ₄₀ %	
Australia	9%	53%	26	-17%	
Italy	9%	44%	29	-20%	
Russia	8%	39%	41	.% ₋₃₃ %	
Serbia	8%	40%	36		
Spain	8%	56%	30	-22%	
Canada	7%	54%	25	-18%	
Sweden	7%	41%	30	-23%	
Belgium	<mark>6%</mark>	45%		-24%	
France	6%	35%	33	-27%	
Germany	<mark>-5%</mark>	56%		·25%	
Great Britain	<mark>5%</mark>	60%		·20%	
Japan	<mark>5</mark> %			.% -16%	

Grocery Delivery

- In the US, Amazon has begun investing in grocery delivery through their Whole Foods chain.
- Despite this investment, just 15% of Americans predict they will have more groceries delivered this year.

Q4. How do you think the following will change over the next year? – Having groceries delivered to my home.

	More frequently	About the same	Less frequently	Net score minus %	e (% more less)
World	18%	42%		27% -9% 🗖	
India		47%	36%	13%	34%
Hungary		45%	44%	7%	38%
China		41%	43%	14%	27%
Saudi Arabia	31%			22%	9%
Poland	30%		47%	11%	19%
South Korea	26%		55%	15%	11%
South Africa	24%	29%		35% -11%	
Romania	22%	429	6	27% -5% -	
Colombia	21%	29%		40% -19%	
Mexico	21%	26%		40% -19%	
Peru	19%	29%		3 6% - ₁₇ %	
Chile	17%	24%		41% -24%	
Brazil	15%		51%	23% -8%	
Malaysia	15%	42%		33% -18%	
Sweden	15%	38%		23% -8% 🗖	
US	15%		52%	17% -2%	
Turkey	13%	43%		3 1% -18% 	
Argentina	12%	23%	l.	46% - ₃₄ %	
Great Britain	11%		62%	17% -6% –	
Spain	11%	45%		33% -22%	
Italy	10%	39%		2 8% -18% -1 8	
Japan	10%		65%	-4%	
Australia	9%	53	3%	-15%	
Canada	8%	49%		25% -17%	
Germany	8%	48%		2 9% -21%	
Russia	8%	41%		38% _{-30%}	
Serbia	8%	36%		37% _{-29%}	
Belgium	7%	43%		27% -20%	
France	6%	37%		31% -25%	

Dining Out

- More of the world expects to dine out less this year than more.
- However, a majority of the world simply expects to dine out the same amount.

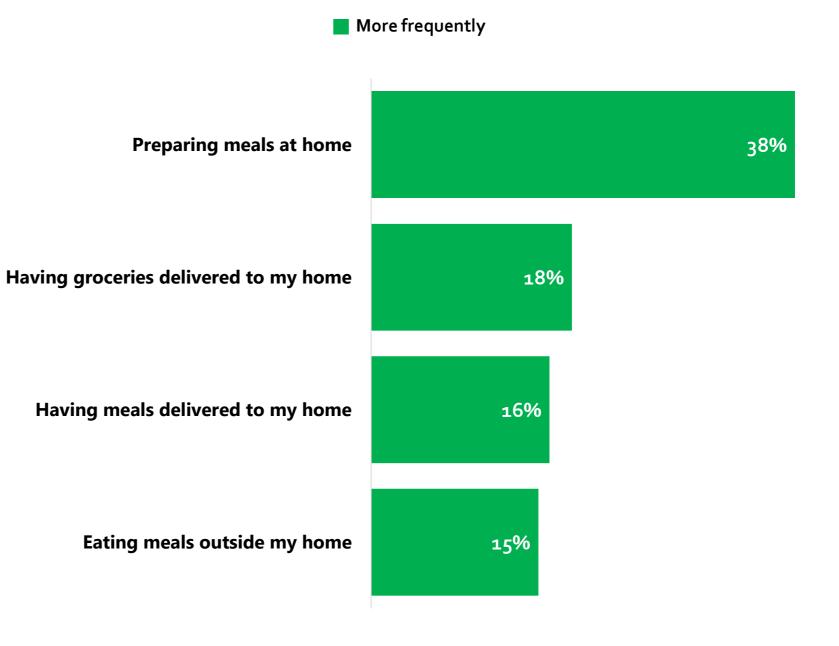
Q4. How do you think the following will change over the next year? – Eating meals outside my home.

	More frequently	About the same	Less frequently		Net score (minus % le	
World	15%	53%		28%	-13%	
China	30%		46%	22%		8 %
Saudi Arabia	29%	419	%	26%		3 %
India	28%	40%		29%	-1%	
South Korea	26%		59%	12%		14%
Hungary	24%		56%	14%		10%
Chile	20%	42%		34%	-14%	
Peru	20%	42%		34%	-14%	
Poland	19%		53%	19%		0%
Colombia	18%	43%		37%	-19%	
Malaysia	18%	47%		32%	-14%	
Mexico	18%	46%		33%	-15%	
Brazil	17%	46%		31%	-14%	
South Africa	14%	38%		44%	-30%	
Turkey	14%	40%		43%	-29%	
Romania	13%	57	%	25%	-12%	
Serbia	13%	55	9%	25%	-12%	
Argentina	12%	31%		53%	-41%	
Australia	10%		64%	23%	-13%	
Japan	10%		67%	19%	-9%	
Spain	10%	61	۱%	25%	-15%	
Sweden	10%	6	52%	24%	-14%	
US	10%		66%	22%	-12%	
Italy	9%	57%		26%	-17%	
Russia	9%	48%		39%	-30%	
France	8%	56%		27%	-19%	
Germany	8%		65%	22%	-14%	
Canada	7%	61%		29%	-22%	
Great Britain	7%		67%	23%	-16%	
Belgium	<mark>- 5%</mark>		67%	20%	-15%	

World Summary

 The common expectation around the world is that food consumption habits will mostly remain the same, with a slight lean toward a year with more home cooked meals.

Q4. How do you think the following will change over the next year? – More frequently world summary.



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