



# Topline Results

## Attitudes Toward Food Among Americans and Canadians

### Data from several recent Ipsos surveys

New York, NY, December 4, 2018

*Global Advisor Survey, conducted September 2018*

1. To what extent do you agree or disagree with the following statements:
  - a. I only eat organic foods

	Global Total (N = 20,788)	Total US (N = 1,000)	Total Canada (N = 1,001)
Strongly agree	6%	6%	3%
Somewhat agree	23	14	12
Somewhat disagree	33	29	30
Strongly disagree	33	49	54
Don't know	5	2	1
<i>Agree (net)</i>	<i>29%</i>	<i>20%</i>	<i>15%</i>
<i>Disagree (net)</i>	<i>66</i>	<i>78</i>	<i>84</i>

- b. I would never eat a genetically modified food

	Global Total	Total US	Total Canada
Strongly agree	27%	12%	13%
Somewhat agree	27	22	25
Somewhat disagree	24	34	32
Strongly disagree	12	22	20
Don't know	10	10	9
<i>Agree (net)</i>	<i>54%</i>	<i>34%</i>	<i>38%</i>
<i>Disagree (net)</i>	<i>36</i>	<i>57</i>	<i>52</i>

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c. I would eat a plant-based substitute for meat

	Global Total	Total US	Total Canada
Strongly agree	14%	14%	14%
Somewhat agree	28	24	29
Somewhat disagree	25	24	24
Strongly disagree	27	32	28
Don't know	7	5	5
<i>Agree (net)</i>	<i>41%</i>	<i>38%</i>	<i>43%</i>
<i>Disagree (net)</i>	<i>52</i>	<i>57</i>	<i>52</i>

d. I prefer to eat food produced locally, even if that means I have fewer foods to choose from

	Global Total	Total US	Total Canada
Strongly agree	22%	15%	17%
Somewhat agree	42	38	46
Somewhat disagree	24	31	25
Strongly disagree	9	10	10
Don't know	4	5	3
<i>Agree (net)</i>	<i>63%</i>	<i>53%</i>	<i>62%</i>
<i>Disagree (net)</i>	<i>33</i>	<i>42</i>	<i>35</i>

e. I prefer to not eat any type of meat, poultry, or fish

	Global Total	Total US	Total Canada
Strongly agree	8%	7%	6%
Somewhat agree	13	8	10
Somewhat disagree	24	19	16
Strongly disagree	51	64	68
Don't know	4	2	1
<i>Agree (net)</i>	<i>20%</i>	<i>16%</i>	<i>15%</i>
<i>Disagree (net)</i>	<i>75</i>	<i>82</i>	<i>84</i>

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## 2. To what extent do you agree or disagree with the following statements:

### a. I am content with my current weight

	Global Total	Total US	Total Canada
Strongly agree	20%	17%	16%
Somewhat agree	34	29	36
Somewhat disagree	28	34	31
Strongly disagree	16	19	16
Don't know	2	1	1
<i>Agree (net)</i>	<i>54%</i>	<i>47%</i>	<i>52%</i>
<i>Disagree (net)</i>	<i>43</i>	<i>53</i>	<i>47</i>

### b. I have tried a diet to lose weight

	Global Total	Total US	Total Canada
Strongly agree	21%	20%	21%
Somewhat agree	30	32	29
Somewhat disagree	20	18	21
Strongly disagree	26	28	29
Don't know	4	1	1
<i>Agree (net)</i>	<i>51%</i>	<i>53%</i>	<i>50%</i>
<i>Disagree (net)</i>	<i>46</i>	<i>46</i>	<i>49</i>

### c. I believe that most diet plans ultimately fail

	Global Total	Total US	Total Canada
Strongly agree	22%	25%	28%
Somewhat agree	39	44	47
Somewhat disagree	24	20	16
Strongly disagree	9	6	4
Don't know	6	6	5
<i>Agree (net)</i>	<i>61%</i>	<i>69%</i>	<i>75%</i>
<i>Disagree (net)</i>	<i>33</i>	<i>26</i>	<i>20</i>

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d. I exercise so that I don't have to watch what I eat

	Global Total	Total US	Total Canada
Strongly agree	13%	7%	7%
Somewhat agree	32	27	27
Somewhat disagree	32	38	38
Strongly disagree	19	26	26
Don't know	4	2	1
<i>Agree (net)</i>	<i>45%</i>	<i>34%</i>	<i>34%</i>
<i>Disagree (net)</i>	<i>51</i>	<i>64</i>	<i>64</i>

e. I would rather eat well than be thin

	Global Total	Total US	Total Canada
Strongly agree	20%	19%	18%
Somewhat agree	42	44	49
Somewhat disagree	26	26	21
Strongly disagree	9	8	8
Don't know	4	3	3
<i>Agree (net)</i>	<i>62%</i>	<i>63%</i>	<i>67%</i>
<i>Disagree (net)</i>	<i>34</i>	<i>34</i>	<i>29</i>

3. Looking into the future, do you think the following will get better or worse?

a. The cost of the food I eat

	Global Total	Total US	Total Canada
Will get much better	4%	5%	1%
Will get somewhat better	16	13	7
Will stay the same	31	33	21
Will get somewhat worse	36	40	50
Will get much worse	13	10	21
<i>Get better (net)</i>	<i>21%</i>	<i>17%</i>	<i>9%</i>
<i>Get worse (net)</i>	<i>48</i>	<i>50</i>	<i>71</i>

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## b. The quality of the food I eat

	Global Total	Total US	Total Canada
Will get much better	7%	9%	3%
Will get somewhat better	26	26	23
Will stay the same	42	51	51
Will get somewhat worse	19	11	19
Will get much worse	6	3	4
<i>Get better (net)</i>	<i>33%</i>	<i>35%</i>	<i>25%</i>
<i>Get worse (net)</i>	<i>25</i>	<i>14</i>	<i>23</i>

## c. My access to healthy food

	Global Total	Total US	Total Canada
Will get much better	8%	8%	4%
Will get somewhat better	28	26	21
Will stay the same	42	50	50
Will get somewhat worse	16	12	21
Will get much worse	6	4	3
<i>Get better (net)</i>	<i>36%</i>	<i>34%</i>	<i>25%</i>
<i>Get worse (net)</i>	<i>22</i>	<i>16</i>	<i>24</i>

## d. The environmental impact of the food I eat

	Global Total	Total US	Total Canada
Will get much better	5%	5%	2%
Will get somewhat better	22	20	16
Will stay the same	43	54	51
Will get somewhat worse	23	17	27
Will get much worse	7	4	4
<i>Get better (net)</i>	<i>27%</i>	<i>25%</i>	<i>18%</i>
<i>Get worse (net)</i>	<i>29</i>	<i>21</i>	<i>31</i>

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## 4. How do you think the following will change over the next year?

### a. Preparing meals at home

	Global Total	Total US	Total Canada
More frequently	38%	31%	30%
About the same	52	61	65
Less frequently	7	5	3
I don't know	2	2	2

### b. Having meals delivered to my home

	Global Total	Total US	Total Canada
More frequently	16%	12%	7%
About the same	45	54	54
Less frequently	31	22	25
I don't know	9	12	14

### c. Having groceries delivered to my home

	Global Total	Total US	Total Canada
More frequently	18%	15%	8%
About the same	42	52	49
Less frequently	27	17	25
I don't know	13	16	19

### d. Eating meals outside my home

	Global Total	Total US	Total Canada
More frequently	15%	10%	7%
About the same	53	66	61
Less frequently	28	22	29
I don't know	4	2	3



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Survey conducted September 21-25, 2018

1. How often, if at all, do you typically have dinner at home with your family?

	Total US (N = 1,574)	Total Canada (N = 1,004)
Every day	33%	45%
5-6 days per week	31	28
3-4 days per week	20	12
1-2 days per week	11	9
Never	2	2
Not Applicable / I don't live with family members	3	3

2. And when you have dinner at home with your family, about how much time do you typically spend at the dinner table together?

	Total US (N = 1,488)	Total Canada (N = 952)
Over an hour	5%	10%
40-60 minutes	20	24
30-39 minutes	28	26
20-29 minutes	25	22
10-19 minutes	13	11
Less than 10 minutes	2	2
None / we don't sit together	6	6

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3. Please indicate whether you agree or disagree with each of the following statements about eating dinner at home with your family.

**Total agree**

	Total US	Total Canada
Eating together means that we communicate better with each other	76%	78%
We eat together because it is our habit or custom to do so	71%	71%
Eating together is a priority for our family	65%	65%
Eating together means that everyone eats a more well-balanced meal	61%	67%
We often have the TV on during meals	56%	57%
In our household we do not allow phones or tablets during meals	52%	55%
I wish our family spent more time eating together at home	43%	47%
In our household we do not allow the TV on during meals	31%	30%
We use phones or tablets during meals	25%	20%

a. Eating together means that we communicate better with each other

	Total US	Total Canada
Strongly agree	37%	40%
Somewhat agree	39	38
Neither agree or disagree	15	14
Somewhat disagree	3	4
Strongly disagree	2	2
Don't know	2	1
Not Applicable / I don't live with family members	2	2
<i>Agree (net)</i>	<i>76%</i>	<i>78%</i>
<i>Disagree (net)</i>	<i>5</i>	<i>5</i>

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## b. Eating together means that everyone eats a more well-balanced meal

	Total US	Total Canada
Strongly agree	26	30%
Somewhat agree	35	37
Neither agree or disagree	23	19
Somewhat disagree	7	7
Strongly disagree	5	4
Don't know	2	2
Not Applicable / I don't live with family members	2	2
<i>Agree (net)</i>	<i>61%</i>	<i>67%</i>
<i>Disagree (net)</i>	<i>12</i>	<i>10</i>

## c. We eat together because it is our habit or custom to do so

	Total US	Total Canada
Strongly agree	34	32%
Somewhat agree	37	39
Neither agree or disagree	14	14
Somewhat disagree	7	7
Strongly disagree	5	5
Don't know	2	1
Not Applicable / I don't live with family members	2	2
<i>Agree (net)</i>	<i>71%</i>	<i>71%</i>
<i>Disagree (net)</i>	<i>12</i>	<i>12</i>

## d. Eating together is a priority for our family

	Total US	Total Canada
Strongly agree	34%	33%
Somewhat agree	31	32
Neither agree or disagree	18	20
Somewhat disagree	7	7
Strongly disagree	6	5
Don't know	1	1
Not Applicable / I don't live with family members	2	2
<i>Agree (net)</i>	<i>65%</i>	<i>65%</i>
<i>Disagree (net)</i>	<i>13</i>	<i>12</i>

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e. We often have the TV on during meals

	Total US	Total Canada
Strongly agree	28%	27%
Somewhat agree	28	30
Neither agree or disagree	11	12
Somewhat disagree	10	10
Strongly disagree	21	19
Don't know	1	1
Not Applicable / I don't live with family members	2	1
<i>Agree (net)</i>	<i>56%</i>	<i>57%</i>
<i>Disagree (net)</i>	<i>30</i>	<i>29</i>

f. We use phones or tablets during meals

	Total US	Total Canada
Strongly agree	8%	5%
Somewhat agree	17	15
Neither agree or disagree	12	14
Somewhat disagree	19	16
Strongly disagree	41	46
Don't know	1	2
Not Applicable / I don't live with family members	2	2
<i>Agree (net)</i>	<i>25%</i>	<i>20%</i>
<i>Disagree (net)</i>	<i>60</i>	<i>62</i>

g. In our household we do not allow phones or tablets during meals

	Total US	Total Canada
Strongly agree	31	34%
Somewhat agree	21	21
Neither agree or disagree	14	16
Somewhat disagree	16	13
Strongly disagree	15	12
Don't know	1	1
Not Applicable / I don't live with family members	2	3
<i>Agree (net)</i>	<i>52%</i>	<i>55%</i>
<i>Disagree (net)</i>	<i>31%</i>	<i>26</i>

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## h. In our household we do not allow the TV on during meals

	Total US	Total Canada
Strongly agree	17%	18%
Somewhat agree	13	12
Neither agree or disagree	14	16
Somewhat disagree	19	20
Strongly disagree	33	32
Don't know	1	1
Not Applicable / I don't live with family members	2	2
<i>Agree (net)</i>	<i>31%</i>	<i>30%</i>
<i>Disagree (net)</i>	<i>53</i>	<i>52</i>

## i. I wish our family spent more time eating together at home

	Total US	Total Canada
Strongly agree	18%	21%
Somewhat agree	25	25
Neither agree or disagree	36	36
Somewhat disagree	8	7
Strongly disagree	8	6
Don't know	2	2
Not Applicable / I don't live with family members	2	3
<i>Agree (net)</i>	<i>43%</i>	<i>47%</i>
<i>Disagree (net)</i>	<i>17</i>	<i>13</i>

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# Topline Results

Survey conducted October 5-10, 2018

## 1. How familiar are you with each of the following terms?

### Total familiar

	<b>Total US (N = 2,010)</b>	<b>Total Canada (N = 1,005)</b>
Organic	91%	90%
Gluten free	85%	83%
GMO	74%	71%
Sustainable food production	65%	60%
CRISPR	18%	15%

### a. Gluten free

	<b>Total US</b>	<b>Total Canada</b>
Very familiar	40%	37%
Somewhat familiar	44	47
Not very familiar	12	13
Not at all familiar	4	4
<i>Familiar (Net)</i>	<i>85%</i>	<i>83%</i>
<i>Not familiar (Net)</i>	<i>15</i>	<i>17%</i>

### b. CRISPR

	<b>Total US</b>	<b>Total Canada</b>
Very familiar	7%	4%
Somewhat familiar	12	11
Not very familiar	22	24
Not at all familiar	59	61
<i>Familiar (Net)</i>	<i>18%</i>	<i>15%</i>
<i>Not familiar (Net)</i>	<i>82</i>	<i>85</i>

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# Topline Results

## c. GMO

	Total US	Total Canada
Very familiar	32%	28%
Somewhat familiar	42	43
Not very familiar	19	19
Not at all familiar	7	10
<i>Familiar (Net)</i>	<i>74%</i>	<i>71%</i>
<i>Not familiar (Net)</i>	<i>26</i>	<i>29</i>

## d. Organic

	Total US	Total Canada
Very familiar	48%	43%
Somewhat familiar	43	47
Not very familiar	6	7
Not at all familiar	3	3
<i>Familiar (Net)</i>	<i>91%</i>	<i>90%</i>
<i>Not familiar (Net)</i>	<i>9</i>	<i>10</i>

## e. Sustainable food production

	Total US	Total Canada
Very familiar	22%	17%
Somewhat familiar	43	43
Not very familiar	26	29
Not at all familiar	9	11
<i>Familiar (Net)</i>	<i>65%</i>	<i>60%</i>
<i>Not familiar (Net)</i>	<i>35</i>	<i>40</i>

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2. CRISPR is a gene-editing technology that changes DNA in a way that is similar to, but much faster than current plant breeding methods. It is different from the process used to make genetically modified organisms (GMOs). Based on this description, how familiar are you with the name CRISPR or this technology?

	Total US	Total Canada
Very familiar	10%	4%
Somewhat familiar	19	19
Not very familiar	27	28
Not at all familiar	44	49
<i>Familiar (Net)</i>	<i>29%</i>	<i>23%</i>
<i>Not familiar (Net)</i>	<i>71</i>	<i>77</i>

3. Please rank how important you find each of the following uses of plant genome editing, by using 1 to indicate the use you think is most important and 6 to indicate the use you find least important. Please rank each item in terms of importance, using each number between 1 and 6 only one time.

### Total Important Rank 1/2/3

	Total US	Total Canada
I do not believe we should use gene-editing technologies such as these.	63%	72%
Plants with higher nutritional value	59%	58%
Disease-resistant plants	52%	50%
Crops with greater yields/output	51%	43%
Crops that need less fertilizer	37%	36%
Non-allergenic or less allergenic plants	28%	31%
Plants with designer characteristics (e.g. indigo roses)	10%	10%

### a. Disease-resistant plants

	Total US	Total Canada
1 - Most Important	17%	15%
2	18	17
3	17	18
4	12	14
5	10	9
6 - Least Important	5	3
I do not believe we should use gene-editing technologies such as these.	21	24
<i>Rank 1/2/3 (Net)</i>	<i>52%</i>	<i>50%</i>

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## b. Plants with higher nutritional value

	Total US	Total Canada
1 - Most Important	27%	32%
2	18	16
3	14	10
4	11	8
5	7	7
6 - Least Important	3	3
I do not believe we should use gene-editing technologies such as these.	21	24
<i>Rank 1/2/3 (Net)</i>	<i>59%</i>	<i>58%</i>

## c. Non-allergenic or less allergenic plants

	Total US	Total Canada
1 - Most Important	7%	7%
2	10	11
3	11	13
4	17	17
5	27	20
6 - Least Important	8	8
I do not believe we should use gene-editing technologies such as these.	21	24
<i>Rank 1/2/3 (Net)</i>	<i>28%</i>	<i>31%</i>

## d. Crops with greater yields/output

	Total US	Total Canada
1 - Most Important	17%	13%
2	16	16
3	18	14
4	14	13
5	10	16
6 - Least Important	4	4
I do not believe we should use gene-editing technologies such as these.	21	24
<i>Rank 1/2/3 (Net)</i>	<i>51%</i>	<i>43%</i>

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## e. Crops that need less fertilizer

	Total US	Total Canada
1 - Most Important	10%	6%
2	12	14
3	15	16
4	21	18
5	16	15
6 - Least Important	5	7
I do not believe we should use gene-editing technologies such as these.	21	24
<i>Rank 1/2/3 (Net)</i>	<i>38%</i>	<i>36%</i>

## f. Plants with "designer" characteristics (e.g. indigo roses)

	Total US	Total Canada
1 - Most Important	2%	3%
2	4	2
3	4	6
4	5	7
5	9	9
6 - Least Important	56	50
I do not believe we should use gene-editing technologies such as these.	21	24
<i>Rank 1/2/3 (Net)</i>	<i>10%</i>	<i>10%</i>

## 4. Please rate how important you find each of the following uses of plant genome editing.

### Total important

	Total US	Total Canada
Plants with higher nutritional value	70%	61%
Disease-resistant plants	69%	58%
Crops with greater yields/output	69%	55%
Crops that need less fertilizer	68%	60%
Non-allergenic or less allergenic plants	60%	56%
Plants with designer characteristics (e.g. indigo roses)	30%	24%

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## a. Disease-resistant plants

	Total US	Total Canada
Very important	31%	21%
Somewhat important	38	37
Somewhat unimportant	6	10
Very unimportant	1	2
I do not believe we should use gene-editing technologies such as these.	23	30
<i>Important (Net)</i>	<i>69%</i>	<i>58%</i>
<i>Not important (Net)</i>	<i>7</i>	<i>12</i>

## b. Plants with higher nutritional value

	Total US	Total Canada
Very important	35%	28%
Somewhat important	35	33
Somewhat unimportant	5	7
Very unimportant	2	2
I do not believe we should use gene-editing technologies such as these.	23	30
<i>Important (Net)</i>	<i>70%</i>	<i>61%</i>
<i>Not important (Net)</i>	<i>7</i>	<i>9</i>

## c. Non-allergenic or less allergenic plants

	Total US	Total Canada
Very important	22%	18%
Somewhat important	38	38
Somewhat unimportant	13	11
Very unimportant	3	3
I do not believe we should use gene-editing technologies such as these.	23	30
<i>Important (Net)</i>	<i>60%</i>	<i>56%</i>
<i>Not important (Net)</i>	<i>16</i>	<i>14</i>

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# Topline Results

## d. Crops with greater yields/output

	Total US	Total Canada
Very important	28%	18%
Somewhat important	41	37
Somewhat unimportant	6	12
Very unimportant	2	3
I do not believe we should use gene-editing technologies such as these.	23	30
<i>Familiar (Net)</i>	<i>69%</i>	<i>55%</i>
<i>Not familiar (Net)</i>	<i>7</i>	<i>15</i>

## e. Crops that need less fertilizer

	Total US	Total Canada
Very important	30%	20%
Somewhat important	38	40
Somewhat unimportant	7	8
Very unimportant	1	2
I do not believe we should use gene-editing technologies such as these.	23	30
<i>Important (Net)</i>	<i>68%</i>	<i>60%</i>
<i>Not important (Net)</i>	<i>9</i>	<i>10</i>

## f. Plants with "designer" characteristics (e.g. indigo roses)

	Total US	Total Canada
Very important	8%	4%
Somewhat important	23	20
Somewhat unimportant	29	33
Very unimportant	18	13
I do not believe we should use gene-editing technologies such as these.	23	30
<i>Important (Net)</i>	<i>30%</i>	<i>24%</i>
<i>Not important (Net)</i>	<i>46</i>	<i>46</i>

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# Topline Results

5. For each of the following, please indicate the impact you believe plant genome editing will have on agriculture in the future.

## Total positive impact

	Total US	Total Canada
The ability to grow enough food for the world's population	74%	73%
Safety and nutrition of food	58%	59%
The livelihood of farmers	58%	62%
The environmental impact of food production	58%	61%
The impact on human health	52%	56%

### a. Safety and nutrition of food

	Total US	Total Canada
Very positive impact	23%	22%
Somewhat positive impact	35	37
No impact	15	14
Somewhat negative impact	18	18
Very negative impact	9	9
<i>Positive Impact (Net)</i>	<i>58%</i>	<i>59%</i>
<i>Negative Impact (Net)</i>	<i>27</i>	<i>26</i>

### b. The livelihood of farmers

	Total US	Total Canada
Very positive impact	22%	22%
Somewhat positive impact	37	40
No impact	16	14
Somewhat negative impact	18	17
Very negative impact	8	7
<i>Positive Impact (Net)</i>	<i>58%</i>	<i>62%</i>
<i>Negative Impact (Net)</i>	<i>26</i>	<i>24</i>

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# Topline Results

## c. The ability to grow enough food for the world's population

	Total US	Total Canada
Very positive impact	33%	31%
Somewhat positive impact	42	42
No impact	14	15
Somewhat negative impact	7	9
Very negative impact	4	4
<i>Positive Impact (Net)</i>	<i>74%</i>	<i>73%</i>
<i>Negative Impact (Net)</i>	<i>12</i>	<i>13</i>

## d. The environmental impact of food production

	Total US	Total Canada
Very positive impact	21%	18%
Somewhat positive impact	38	43
No impact	17	15
Somewhat negative impact	17	17
Very negative impact	8	7
<i>Positive Impact (Net)</i>	<i>58%</i>	<i>61%</i>
<i>Negative Impact (Net)</i>	<i>25</i>	<i>24</i>

## e. The impact on human health

	Total US	Total Canada
Very positive impact	20%	21%
Somewhat positive impact	32	35
No impact	19	13
Somewhat negative impact	21	20
Very negative impact	9	11
<i>Positive Impact (Net)</i>	<i>52%</i>	<i>56%</i>
<i>Negative Impact (Net)</i>	<i>29</i>	<i>31</i>

## 6. Would you say the following statement is true or false? Plants naturally contain DNA.

	Total US	Total Canada
True	90%	90%
False	10	10



# Topline Results

7. Overall, how concerned are you about the amount of sugar in your diet?

	Total US	Total Canada
Very concerned	27%	26%
Somewhat concerned	43	45
Not very concerned	23	23
Not at all concerned	7	6
<i>Concerned (Net)</i>	<i>70%</i>	<i>71%</i>
<i>Not concerned (Net)</i>	<i>30</i>	<i>29</i>

8. How likely are you to seek out or use sugar substitutes such as Stevia, Splenda, Agave, Monk Fruit, etc. rather than choose products with sugar?

	Total US	Total Canada
Very likely	24%	16
Somewhat likely	25	26
Somewhat unlikely	21	25
Very unlikely	30	33
<i>Likely (Net)</i>	<i>49%</i>	<i>42%</i>
<i>Unlikely (Net)</i>	<i>51</i>	<i>58</i>

9. How concerned are you about the sugar content of each of the following products?

	Total US	Total Canada
Soda, pop and other carbonated beverages	76%	78%
Juices	71%	74%
Candy	69%	73%
Deserts and other sweets	69%	74%
Canned fruit	65%	66%
Sauces and condiments such as BBQ sauce and Ketchup	59%	57%
Flavored coffee	50%	55%
Soda, pop and other carbonated beverages	76%	78%
Juices	71%	74%

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# Topline Results

## a. Candy

	Total US	Total Canada
Very concerned	39%	40%
Somewhat concerned	30	33
Not very concerned	21	20
Not at all concerned	10	7
<i>Concerned (Net)</i>	<i>69%</i>	<i>73%</i>
<i>Not concerned (Net)</i>	<i>31</i>	<i>27</i>

## b. Soda, pop and other carbonated beverages

	Total US	Total Canada
Very concerned	48%	47%
Somewhat concerned	28	31
Not very concerned	14	16
Not at all concerned	10	6
<i>Concerned (Net)</i>	<i>76%</i>	<i>78%</i>
<i>Not concerned (Net)</i>	<i>24</i>	<i>22</i>

## c. Juices

	Total US	Total Canada
Very concerned	32%	32%
Somewhat concerned	39	42
Not very concerned	20	21
Not at all concerned	9	5
<i>Concerned (Net)</i>	<i>71%</i>	<i>74%</i>
<i>Not concerned (Net)</i>	<i>29</i>	<i>26</i>

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# Topline Results

## d. Deserts and other sweets

	Total US	Total Canada
Very concerned	33%	32%
Somewhat concerned	36	42
Not very concerned	22	20
Not at all concerned	9	5
<i>Concerned (Net)</i>	<i>69%</i>	<i>74%</i>
<i>Not concerned (Net)</i>	<i>31</i>	<i>26</i>

## e. Sauces and condiments such as BBQ sauce and Ketchup

	Total US	Total Canada
Very concerned	22%	22%
Somewhat concerned	37	36
Not very concerned	31	34
Not at all concerned	10	9
<i>Concerned (Net)</i>	<i>59%</i>	<i>57%</i>
<i>Not concerned (Net)</i>	<i>41</i>	<i>43</i>

## f. Flavored coffee

	Total US	Total Canada
Very concerned	20%	21%
Somewhat concerned	30	34
Not very concerned	27	29
Not at all concerned	22	16
<i>Concerned (Net)</i>	<i>50%</i>	<i>55%</i>
<i>Not concerned (Net)</i>	<i>50</i>	<i>45</i>

## g. Canned fruit

	Total US	Total Canada
Very concerned	27%	24%
Somewhat concerned	38	41
Not very concerned	26	27
Not at all concerned	10	8
<i>Concerned (Net)</i>	<i>65%</i>	<i>66%</i>
<i>Not concerned (Net)</i>	<i>35</i>	<i>34</i>

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# Topline Results

## 10. Prior to participating in this study, how familiar were you with clean meat?

	Total US	Total Canada
Very familiar	11%	7%
Somewhat familiar	20	23
Not very familiar	23	25
Not at all familiar	46	46
<i>Familiar (Net)</i>	<i>32%</i>	<i>30%</i>
<i>Not familiar (Net)</i>	<i>68</i>	<i>70</i>

## 11. Imagine Clean Meat has become widely available at grocery stores, restaurants, butchers, and markets. How interested are you in trying Clean Meat?

	Total US	Total Canada
Very interested	20%	16%
Somewhat interested	37	42
Not very interested	22	22
Not at all interested	21	19
<i>Interested (Net)</i>	<i>57%</i>	<i>59%</i>
<i>Not interested (Net)</i>	<i>43</i>	<i>41</i>

## 12. What are the most important reasons why you are interested in trying clean meat products?

Base: Interested in trying clean meat products	Total US (N = 1,115)	Total Canada (N = 604)
Health benefits	56%	57%
Environmental benefits	44%	46%
Animal welfare benefits	48%	50%
Food security benefits	32%	35%
Interest in trying a new product	38%	34%
Other	4%	3%

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# Topline Results

## 13. Prior to participating in this study, how familiar were you with plant-based meat?

	Total US	Total Canada
Very familiar	15%	9
Somewhat familiar	30	31
Not very familiar	22	25
Not at all familiar	33	34
<i>Familiar (Net)</i>	<i>45%</i>	<i>40%</i>
<i>Not familiar (Net)</i>	<i>55%</i>	<i>60</i>

## 14. Imagine plant-based Meat has become widely available at grocery stores, restaurants, butchers, and markets. How interested are you in trying plant-based meat?

	Total US	Total Canada
Very interested	20%	15%
Somewhat interested	29	37
Not very interested	23	25
Not at all interested	28	23
<i>Interested (Net)</i>	<i>49%</i>	<i>52%</i>
<i>Not interested (Net)</i>	<i>51</i>	<i>48</i>

## 15. What are the most important reasons why you are interested in trying plant-based meat products?

Base: Interested in trying plant-meat products	Total US (N = 934)	Total Canada (N = 547)
Health benefits	66%	66%
Environmental benefits	44%	49%
Animal welfare benefits	48%	51%
Food security benefits	32%	35%
Interest in trying a new product	43%	39%
Other	3%	3%

## 16. Which of the following best describes your diet:

	Total US	Total Canada
You regularly eat both animal and non-animal products (omnivorous)	84%	80%
You do not eat meat, but do eat other animal products (e.g. eggs, cheese, milk) (vegetarian)	4%	7%
You do not eat any animal products at all (vegan)	2%	2%
You only occasionally eat meat or fish (flexitarian)	7%	8%
You do not eat meat but do eat fish (pescatarian)	3%	2%

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# Topline Results

## 17. To what extent do you feel the following characteristics are necessary for a fast food restaurant?

### Total must have

	Total US	Total Canada
Drinks and beverages	75%	67%
Hot menu items	70%	72%
The ability to customize your order	64%	60%
Side items	59%	54%
A wide selection of menu items	56%	57%
Everything in one place	45%	48%
Cold menu items	34%	39%
Pre-packed grab-and-go items	17%	22%

### a. Pre-packed "grab-and-go" items

	Total US	Total Canada
Must have	17%	22%
May or may not have	68	63
Must not have	15	15

### b. The ability to customize your order

	Total US	Total Canada
Must have	64%	60%
May or may not have	33	37
Must not have	3	3

### c. A wide selection of menu items

	Total US	Total Canada
Must have	56%	57%
May or may not have	41	40
Must not have	3	2



# Topline Results

d. Hot menu items

	Total US	Total Canada
Must have	70%	72%
May or may not have	27	25
Must not have	2	2

e. Cold menu items

	Total US	Total Canada
Must have	34%	39%
May or may not have	61	56
Must not have	4	5

f. Drinks and beverages

	Total US	Total Canada
Must have	75%	67%
May or may not have	22	29
Must not have	3	5

g. "Side" items

	Total US	Total Canada
Must have	59%	54%
May or may not have	38	41
Must not have	3	5

h. Everything in one place

	Total US	Total Canada
Must have	45%	48%
May or may not have	50	48
Must not have	5	4

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# Topline Results

18. And thinking about food and beverages that you can get from a vending machine, of this same list, how do you think offerings from a vending machine compare to offerings from a fast food restaurant?

**Total 'Could do better than a fast food restaurant'**

	Total US	Total Canada
Pre-packed grab-and-go items	38%	32%
Drinks and beverages	28%	27%
Everything in one place	26%	23%
Cold menu items	22%	24%
A wide selection of menu items	19%	18%
The ability to customize your order	17%	16%
Side items	15%	15%
Hot menu items	14%	14%

**i. Pre-packed "grab-and-go" items**

	Total US	Total Canada
Could do better than a fast food restaurant	38%	32%
Would be the same as in a fast food restaurant	40	42
Would not do as well as a fast food restaurant	23	26

**j. The ability to customize your order**

	Total US	Total Canada
Could do better than a fast food restaurant	17%	16%
Would be the same as in a fast food restaurant	22	26
Would not do as well as a fast food restaurant	60	57

**k. A wide selection of menu items**

	Total US	Total Canada
Could do better than a fast food restaurant	19%	18%
Would be the same as in a fast food restaurant	34	30
Would not do as well as a fast food restaurant	47	52



# Topline Results

## l. Hot menu items

	Total US	Total Canada
Could do better than a fast food restaurant	14%	14%
Would be the same as in a fast food restaurant	23	24
Would not do as well as a fast food restaurant	63	62

## m. Cold menu items

	Total US	Total Canada
Could do better than a fast food restaurant	22%	24%
Would be the same as in a fast food restaurant	45	46
Would not do as well as a fast food restaurant	32	30

## n. Drinks and beverages

	Total US	Total Canada
Could do better than a fast food restaurant	28%	27%
Would be the same as in a fast food restaurant	56	57
Would not do as well as a fast food restaurant	17	16

## o. "Side" items

	Total US	Total Canada
Could do better than a fast food restaurant	15%	15%
Would be the same as in a fast food restaurant	34	31
Would not do as well as a fast food restaurant	51	54

## p. Everything in one place

	Total US	Total Canada
Could do better than a fast food restaurant	26%	23%
Would be the same as in a fast food restaurant	40	39
Would not do as well as a fast food restaurant	34	38

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# Topline Results

Survey conducted October 10-12, 2018

- When you see the following terms on grocery food packaging about their impact on the environment, how do you compare that packaging to food packaging that doesn't use these phrases?

## Total Top 2 Box (Better for the environment)

	Total US (N = 2,010)	Total Canada (N = 1,004)
Recyclable	74%	76%
Made from recycled materials	73%	73%
Eco-friendly	71%	73%
Compostable	68%	76%
Degradable	67%	69%
Green	65%	68%
Non-toxic	64%	68%

### a. Recyclable

	Total US	Total Canada
Much better for the environment	38%	40%
Somewhat better for the environment	36	35
About the same	22	16
Somewhat worse for the environment	3	5
Much worse for the environment	1	4
<i>Top 2 Box (Net)</i>	<b>74%</b>	<b>76%</b>
<i>Bottom 2 Box (Net)</i>	4	9

### b. Compostable

	Total US	Total Canada
Much better for the environment	35%	42%
Somewhat better for the environment	33	34
About the same	27	17
Somewhat worse for the environment	2	4
Much worse for the environment	2	3
<i>Top 2 Box (Net)</i>	<b>68%</b>	<b>76%</b>
<i>Bottom 2 Box (Net)</i>	5	7

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# Topline Results

## c. Made from recycled materials

	Total US	Total Canada
Much better for the environment	32%	31%
Somewhat better for the environment	41	42
About the same	22	19
Somewhat worse for the environment	3	6
Much worse for the environment	2	3
<i>Top 2 Box (Net)</i>	<i>73%</i>	<i>73%</i>
<i>Bottom 2 Box (Net)</i>	<i>5</i>	<i>8</i>

## d. Green

	Total US	Total Canada
Much better for the environment	27%	27%
Somewhat better for the environment	38	41
About the same	31	25
Somewhat worse for the environment	3	5
Much worse for the environment	2	3
<i>Top 2 Box (Net)</i>	<i>65%</i>	<i>68%</i>
<i>Bottom 2 Box (Net)</i>	<i>4</i>	<i>7</i>

## e. Eco-friendly

	Total US	Total Canada
Much better for the environment	30%	32%
Somewhat better for the environment	40	41
About the same	24	20
Somewhat worse for the environment	3	5
Much worse for the environment	2	2
<i>Top 2 Box (Net)</i>	<i>71%</i>	<i>73%</i>
<i>Bottom 2 Box (Net)</i>	<i>5</i>	<i>7</i>

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# Topline Results

## f. Non-toxic

	Total US	Total Canada
Much better for the environment	30%	28%
Somewhat better for the environment	34	41
About the same	31	24
Somewhat worse for the environment	3	4
Much worse for the environment	2	4
<i>Top 2 Box (Net)</i>	<i>64%</i>	<i>68%</i>
<i>Bottom 2 Box (Net)</i>	<i>5</i>	<i>8</i>

## g. Degradable

	Total US	Total Canada
Much better for the environment	32%	34%
Somewhat better for the environment	35	35
About the same	26	23
Somewhat worse for the environment	4	6
Much worse for the environment	3	3
<i>Top 2 Box (Net)</i>	<i>67%</i>	<i>69%</i>
<i>Bottom 2 Box (Net)</i>	<i>7</i>	<i>9</i>

## 2. Please indicate how much you agree or disagree with each of the following statements.

	Total US	Total Canada
It's important to recycle at home	92%	94%
I would like more food packaging to be made of recyclable materials	89%	93%
I would like more food packaging to be made from recycled materials	87%	92%
I would like to be able to recycle more packaging from fast food or delivery restaurants	85%	91%
I trust that what I put in the recycling bin actually gets recycled	76%	79%
The rules in my community for what can and cannot be recycled are clear and easy to understand	73%	77%
The rules in my community for what can and cannot be recycled are easy and convenient to follow	73%	75%
It's important to compost at home	67%	79%

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# Topline Results

a. I would like to be able to recycle more packaging from fast food or delivery restaurants

	Total US	Total Canada
Strongly agree	42%	53%
Somewhat agree	43	38
Somewhat disagree	11	7
Strongly disagree	4	2
<i>Agree (net)</i>	<i>85%</i>	<i>91%</i>
<i>Disagree (net)</i>	<i>15</i>	<i>9</i>

b. It's important to recycle at home

	Total US	Total Canada
Strongly agree	57%	64%
Somewhat agree	35	30
Somewhat disagree	5	4
Strongly disagree	3	2
<i>Agree (net)</i>	<i>92%</i>	<i>94%</i>
<i>Disagree (net)</i>	<i>8</i>	<i>6</i>

c. I trust that what I put in the recycling bin actually gets recycled

	Total US	Total Canada
Strongly agree	27%	30%
Somewhat agree	50	49
Somewhat disagree	17	15
Strongly disagree	6	5
<i>Agree (net)</i>	<i>76%</i>	<i>79%</i>
<i>Disagree (net)</i>	<i>24</i>	<i>21</i>

d. It's important to compost at home

	Total US	Total Canada
Strongly agree	20%	37%
Somewhat agree	47	43
Somewhat disagree	25	17
Strongly disagree	8	4
<i>Agree (net)</i>	<i>67%</i>	<i>79%</i>
<i>Disagree (net)</i>	<i>33</i>	<i>21</i>

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# Topline Results

e. The rules in my community for what can and cannot be recycled are clear and easy to understand

	Total US	Total Canada
Strongly agree	29%	28%
Somewhat agree	43	49
Somewhat disagree	19	18
Strongly disagree	8	5
<i>Agree (net)</i>	<i>73%</i>	<i>77%</i>
<i>Disagree (net)</i>	<i>27</i>	<i>23</i>

f. The rules in my community for what can and cannot be recycled are easy and convenient to follow

	Total US	Total Canada
Strongly agree	29%	27%
Somewhat agree	45	48
Somewhat disagree	19	20
Strongly disagree	8	5
<i>Agree (net)</i>	<i>73%</i>	<i>75%</i>
<i>Disagree (net)</i>	<i>27</i>	<i>25</i>

g. I would like more food packaging to be made from recycled materials

	Total US	Total Canada
Strongly agree	40%	51%
Somewhat agree	47	41
Somewhat disagree	9	6
Strongly disagree	4	2
<i>Agree (net)</i>	<i>87%</i>	<i>92%</i>
<i>Disagree (net)</i>	<i>13</i>	<i>8</i>

h. I would like more food packaging to be made of recyclable materials

	Total US	Total Canada
Strongly agree	42%	52%
Somewhat agree	47	41
Somewhat disagree	8	5
Strongly disagree	4	2
<i>Agree (net)</i>	<i>89%</i>	<i>93%</i>
<i>Disagree (net)</i>	<i>11</i>	<i>7</i>

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# Topline Results

3. Thinking of quick service restaurants that serve made-to-order foods like hamburgers, french fries, sandwiches, pizza, chicken, tacos, wraps, salads, and hot and cold beverages, what's most important to you when deciding whether or not to visit a quick service restaurant?

## Total Most Important

	Total US	Total Canada
Quality	41%	43%
Price/value	24%	21%
Menu options	15%	14%
Location	7%	9%
Convenience	6%	7%
Brand	6%	5%

### a. Price/value

	Total US	Total Canada
1 - Most Important	24%	21%
2	24	29
3	18	18
4	15	12
5	12	11
6 - Least Important	8	7

### b. Convenience

	Total US	Total Canada
1 - Most Important	6%	7%
2	12	10
3	18	16
4	23	24
5	26	28
6 - Least Important	15	16



# Topline Results

## c. Quality

	Total US	Total Canada
1 - Most Important	41%	43%
2	22	21
3	14	17
4	11	10
5	8	6
6 - Least Important	3	2

## d. Brand

	Total US	Total Canada
1 - Most Important	6%	5%
2	7	10
3	11	9
4	12	13
5	16	16
6 - Least Important	49	46

## e. Menu options

	Total US	Total Canada
1 - Most Important	15%	14%
2	21	18
3	19	21
4	17	21
5	17	14
6 - Least Important	10	11

## f. Location

	Total US	Total Canada
1 - Most Important	7%	9%
2	14	12
3	19	18
4	22	20
5	22	24
6 - Least Important	16	17

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# Topline Results

## 4. Thinking about quick service restaurants, what defines convenience for you?

### Total Most Important

	Total US	Total Canada
Location	38%	28%
Speed	20%	26%
Hours open	17%	18%
Drive-thru	13%	14%
Delivery	7%	9%
An app for ordering ahead	5%	4%

### a. Hours open

	Total US	Total Canada
1 - Most Important	17%	18%
2	25	23
3	22	22
4	19	17
5	12	13
6 - Least Important	7	6

### b. Location

	Total US	Total Canada
1 - Most Important	38%	28%
2	20	21
3	16	17
4	12	16
5	9	10
6 - Least Important	5	8

### c. Delivery

	Total US	Total Canada
1 - Most Important	7%	9%
2	10	11
3	10	11
4	17	21
5	33	32

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# Topline Results

6 - Least Important	23	16
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d. **Drive-thru**

	Total US	Total Canada
1 - Most Important	13%	14%
2	18	15
3	18	17
4	24	20
5	16	18
6 - Least Important	12	16

e. **An app for ordering ahead**

	Total US	Total Canada
1 - Most Important	5%	4%
2	6	5
3	9	8
4	11	12
5	21	21
6 - Least Important	49	50

f. **Speed**

	Total US	Total Canada
1 - Most Important	20%	26%
2	22	25
3	26	25
4	17	14
5	10	6
6 - Least Important	5	3

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# Topline Results

5. 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**

	Total US	Total Canada
I would be willing to try ordering if it was from a brand I know and trust	83%	77%
I would be willing to order from this company if the food was delivered in 20 minutes or less	79%	74%
I would be willing to order from this company if the food was delivered in 30 minutes or less	79%	72%
I would be willing to try ordering from this company	77%	72%
I would be willing to order from this company if I had to order 1 hour in advance	64%	59%
I would be willing to order from this company if I had to order 6 hours in advance	31%	27%
I would be willing to order from this company if I had to order 24 hours in advance	28%	24%

**a. I would be willing to try ordering if it was from a brand I know and trust**

	Total US	Total Canada
Strongly agree	29%	26%
Somewhat agree	53	51
Somewhat disagree	11	14
Strongly disagree	6	9
<i>Agree (net)</i>	<i>83%</i>	<i>77%</i>
<i>Disagree (net)</i>	<i>17</i>	<i>23</i>

**b. I would be willing to try ordering from this company**

	Total US	Total Canada
Strongly agree	24%	21%
Somewhat agree	53	51
Somewhat disagree	14	16
Strongly disagree	9	11
<i>Agree (net)</i>	<i>77%</i>	<i>72%</i>
<i>Disagree (net)</i>	<i>23</i>	<i>28</i>



# Topline Results

c. I would be willing to order from this company if the food was delivered in 20 minutes or less

	Total US	Total Canada
Strongly agree	34%	29%
Somewhat agree	45	45
Somewhat disagree	12	14
Strongly disagree	9	12
<i>Agree (net)</i>	<i>79%</i>	<i>74%</i>
<i>Disagree (net)</i>	<i>21</i>	<i>26</i>

d. I would be willing to order from this company if the food was delivered in 30 minutes or less

	Total US	Total Canada
Strongly agree	31%	26%
Somewhat agree	48	46
Somewhat disagree	13	18
Strongly disagree	8	11
<i>Agree (net)</i>	<i>79%</i>	<i>72%</i>
<i>Disagree (net)</i>	<i>21</i>	<i>28</i>

e. I would be willing to order from this company if I had to order 24 hours in advance

	Total US	Total Canada
Strongly agree	8%	7%
Somewhat agree	20	18
Somewhat disagree	30	32
Strongly disagree	42	43
<i>Agree (net)</i>	<i>28%</i>	<i>24%</i>
<i>Disagree (net)</i>	<i>72</i>	<i>76</i>

f. I would be willing to order from this company if I had to order 6 hours in advance

	Total US	Total Canada
Strongly agree	8%	7%
Somewhat agree	24	20
Somewhat disagree	33	37
Strongly disagree	35	36
<i>Agree (net)</i>	<i>31%</i>	<i>27%</i>
<i>Disagree (net)</i>	<i>69</i>	<i>73</i>

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# Topline Results

g. I would be willing to order from this company if I had to order 1 hour in advance

	Total US	Total Canada
Strongly agree	19%	15%
Somewhat agree	45	44
Somewhat disagree	24	24
Strongly disagree	13	17
<i>Agree (net)</i>	<i>64%</i>	<i>59%</i>
<i>Disagree (net)</i>	<i>36</i>	<i>41</i>

## About the Study

These are findings from an Ipsos Global Advisor Food survey and three separate Ipsos US and Canada polls. For the Global Advisor Food survey, a sample of 20,788 adults 18+ from 30 countries were interviewed online in September 2018. The sample includes 1,001 individuals from the U.S. and 1,000 from Canada. For the first Ipsos US-Canada poll, conducted September 21-25, 2018, a sample of 1,574 adults 18+ from the U.S. and 1,004 from Canada were interviewed online in English. The second poll, conducted October 5-10, 2018, contains a sample of 2,010 individuals from the U.S. and 1,005 from Canada. The third poll, conducted October 10-12, 2018, contains a sample of 2,010 individuals from the U.S. and 1,004 from Canada.

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. Post-hoc weights were made to the population characteristics on gender, age, race/ethnicity, region, and education.

Statistical margins of error are not applicable to online 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 Global Advisor survey has a credibility interval of plus or minus 0.8 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=20,788, DEFF=1.5, adjusted Confidence Interval=+/-2.3 percentage points). This study also has a credibility interval of 3.5 percentage points for both US and Canadian respondents.

The first Ipsos poll, conducted September 21-25, 2018, has a credibility interval of plus or minus 2.8 for US respondents and 3.5 for Canadian respondents. The second Ipsos poll, conducted October 5-10, 2018, has a credibility interval of plus or minus 2.8 for US respondents and 3.5 for Canadian respondents. The third Ipsos poll, conducted October 10-12, 2018, has a credibility interval of plus or minus 2.5 for US respondents and 3.5 for Canadian respondents.

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# Topline Results

For more information about conducting research intended for public release or Ipsos' online polling methodology, please visit our [Public Opinion Polling and Communication](#) page where you can download our brochure, see our public release protocol, or contact us.

## About Ipsos

Ipsos is an independent market research company controlled and managed by research professionals. Founded in France in 1975, Ipsos has grown into a worldwide research group with a strong presence in all key markets. Ipsos ranks fourth in the global research industry.

With offices in 89 countries, Ipsos delivers insightful expertise across five research specializations: brand, advertising and media; customer loyalty; marketing; public affairs research; and survey management.

Ipsos researchers assess market potential and interpret market trends. They develop and build brands. They help clients build long-term relationships with their customers. They test advertising and study audience responses to various media and they measure public opinion around the globe.

Ipsos has been listed on the Paris Stock Exchange since 1999 and generated global revenues of €1,780.5 million in 2017.

### GAME CHANGERS

« Game Changers » is the Ipsos signature.

At Ipsos we are passionately curious about people, markets, brands and society.  
We make our changing world easier and faster to navigate and inspire clients to make smarter decisions.  
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The company is part of the CAC Mid & Small index  
and is eligible for the Deferred Settlement Service (SRD).

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