

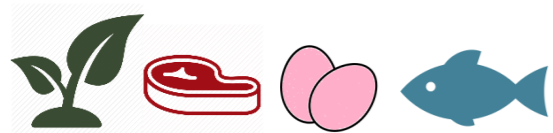
A group of brown and white cows in a barn. The cows are looking towards the camera. They have yellow identification tags on their ears with numbers like 2210, 2233, 2226, 2240, and 2240. The background is dark and blurry, showing wooden beams of the barn.

An exploration into diets around the world

August 2018



An omnivorous diet is the most common diet globally, with non-meat diets (which can include fish) followed by over a tenth of the global population



Omnivorous

73%



Regularly eat both animal and non-animal products



Flexitarian

14%



Only occasionally eat meat or fish



Vegetarian

5%



Do not eat meat but eat other animal products (eggs, cheese, milk)



Vegan

3%



Do not eat animal products at all



Pescatarian

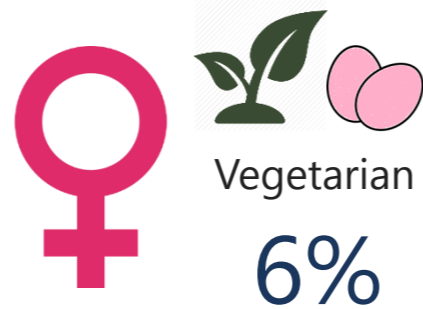
3%



Do not eat meat but do eat fish

Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries

Females are significantly more likely to be vegetarian, whilst males are more likely to be omnivorous



Females are significantly more likely to be vegetarian vs. males (4%)

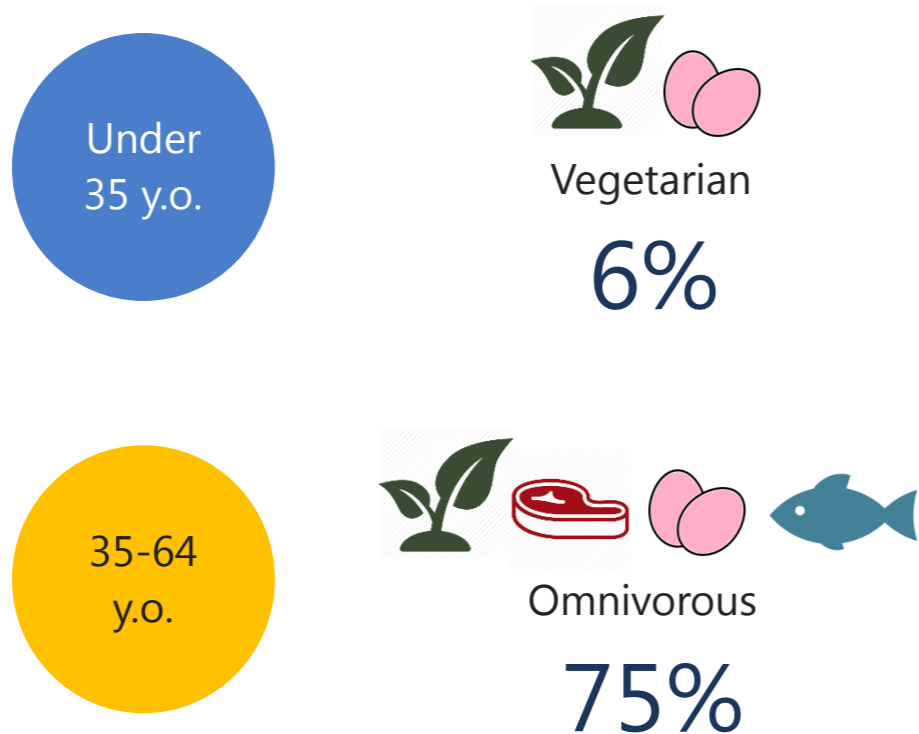
Males n=304, Females n=405



Males are significantly more likely to be omnivorous vs. females (72%)

Males n=5043, Females n=4258

The older population are more likely to be omnivorous, whereas the younger age group are more likely to follow a meat free diet



Under 35 y.o. are significantly more likely to be vegetarian (6% vs. 3%) compared to 35-64 y.o.

35-64 y.o. are significantly more likely to be omnivorous (75% vs. 70%) compared to under 35 y.o.

Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries

Income is a significant driver in the type of diets people choose to follow



Low income



Flexitarian

17%

Low income households are significantly more likely to be flexitarian (17% vs 13%) compared to medium/high income households



Medium/High income



Omnivorous

75%

High income households are significantly more likely to be omnivorous (75% vs 67%) compared to low income households

Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries

We see the biggest diet difference in India, which has significantly higher levels of vegetarian and vegan diets



India is the market which is most different to all other markets. 22% follow a vegetarian diet (second most common diet in India), and 19% are vegan. Both diets are significantly higher than all other markets.



Vegetarianism is strongly linked with the number of practicing religions in India – especially Jainism (<1%), Hinduism (80%) and Buddhism (1%).



Peru, Malaysia and Chile have the highest % of flexitarians. A flexitarian diet is the 2nd most common diet across the majority of markets, including these three.



27% 25% 22%



Higher incomes are associated with diets rich in animal and dairy proteins rather than carbohydrate based staples. (World Health Organisation)



91%

Serbia, Hungary and Russia are the three top meat eating countries.



91%

Only 32% of Indians regularly eat meat, and is the market with the lowest level of meat consumption.



88%

Peru and Turkey have the highest number of pescatarians, however, it is still only the 4th most popular diet in these markets.



8%



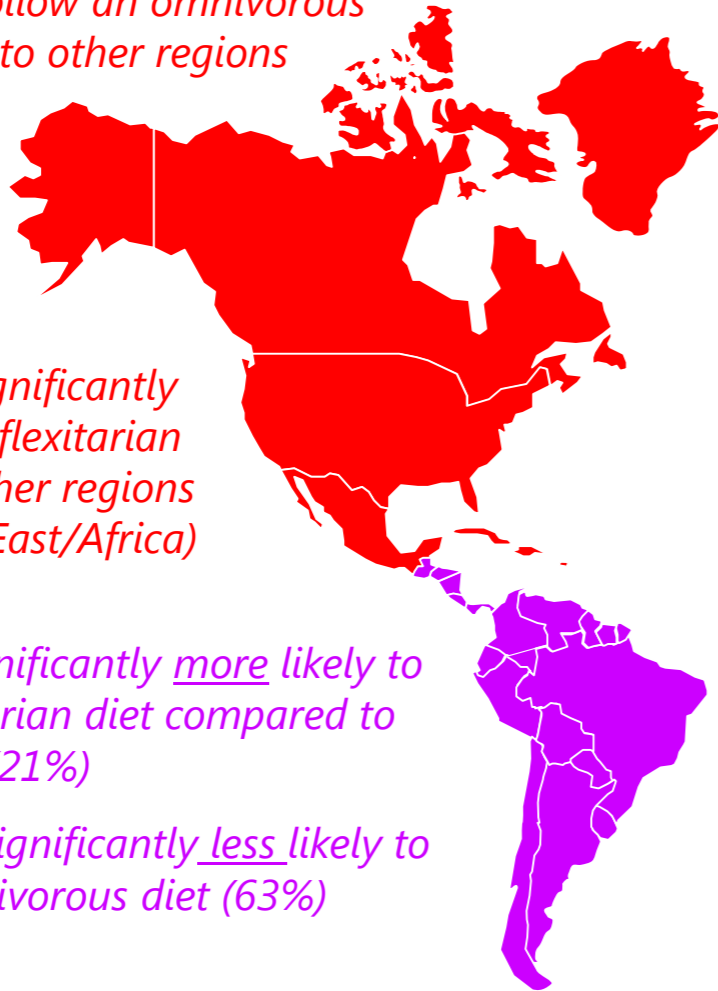
8%



Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries

There are some regional variations in diets in America, the Middle East and Africa

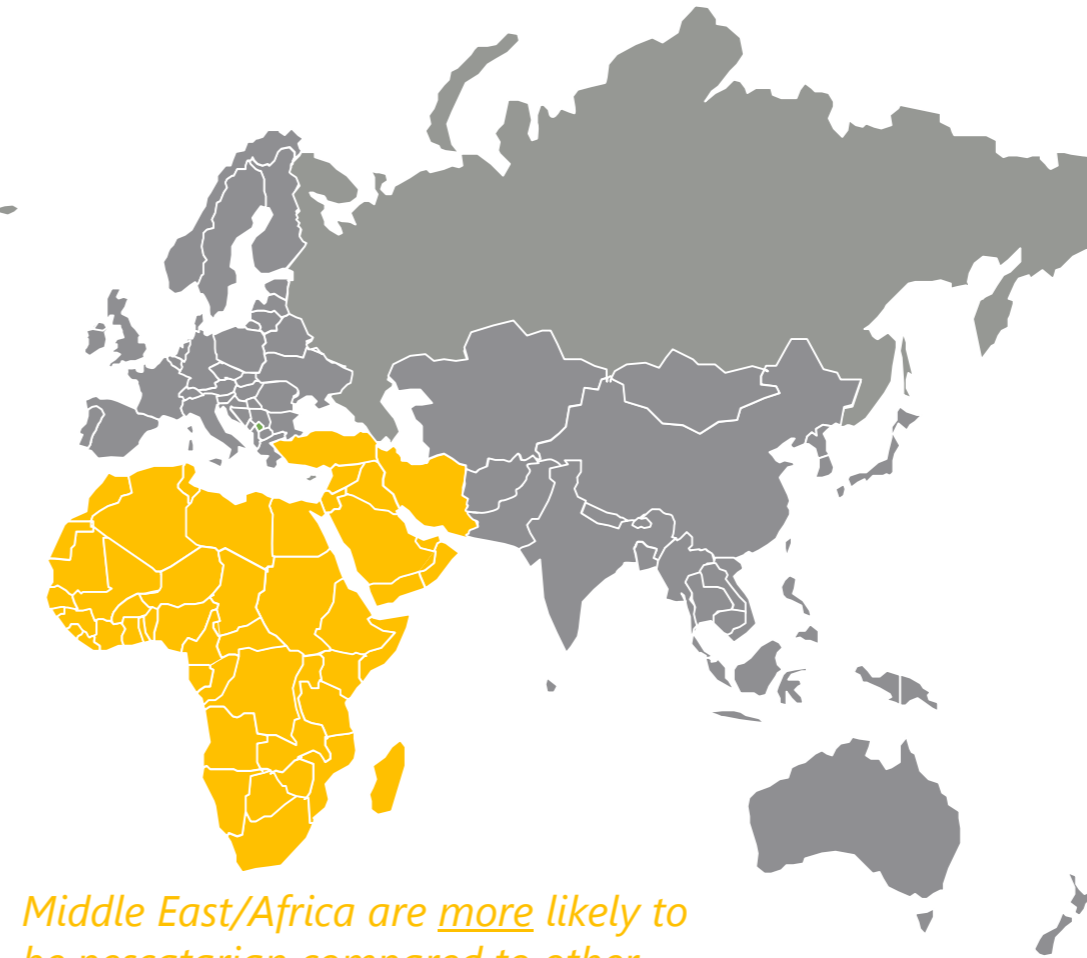
North Americans are significantly more likely to follow an omnivorous diets compared to other regions (82%)



The region is significantly less likely to be flexitarian compared to other regions (except Middle East/Africa)

LATAM are significantly more likely to follow a flexitarian diet compared to other regions (21%)

The region is significantly less likely to follow an omnivorous diet (63%)



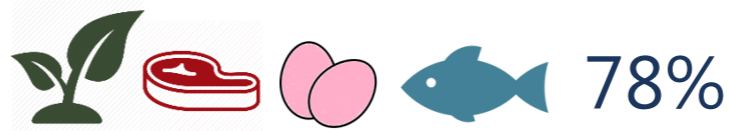
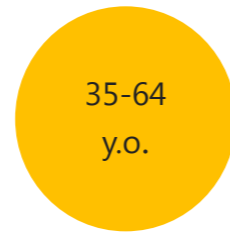
Middle East/Africa are more likely to be pescatarian compared to other regions (5%)



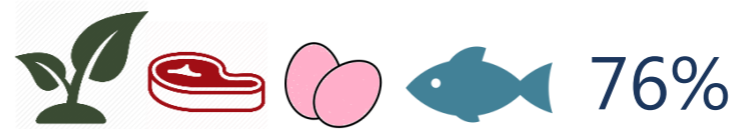
The sample is online, and therefore may not be fully representative in emerging economies

Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries

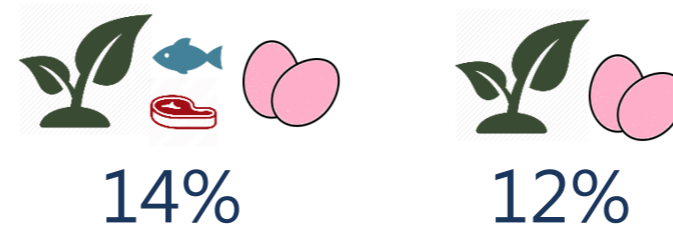
In the UK we see some significant differences across age and household income



35-64 y.o. are significantly more likely to follow an **omnivorous** diet vs. under 35 y.o. (67%) .



Medium and High income HH are significantly more likely to follow an **omnivorous** diet vs. Low income HH (63%).



Low income HH are significantly more likely to follow **flexitarian** and **vegetarian** diets vs. high income HH (8%, 6%)



Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries
Base: GB n=1000

In the UK people have reduced meat consumption for a variety of reasons, the most popular being health, weight management, animal welfare and the environment

In the UK, **Health** is the number one motivation for those limiting or reducing meat consumption (49%). **Weight management** is the second most popular reason (29%), followed by **concern over animal welfare** (24%) and the **environment** (24%) are equal motivators.

Campaigns to reduce meat consumption are working

39% of meat limiters or reducers say that meat reduction campaigns (e.g. meat free Monday's, national vegetarian week, Veganuary) have made them aware of the benefit of eating less meat.

Bloggers are influential

Online healthy eating bloggers and vloggers such as Deliciously Ella, and the Hemsley sisters are also creating significant impact. Sixteen percent say that bloggers' advice has encouraged them to reduce the amount of meat they eat.

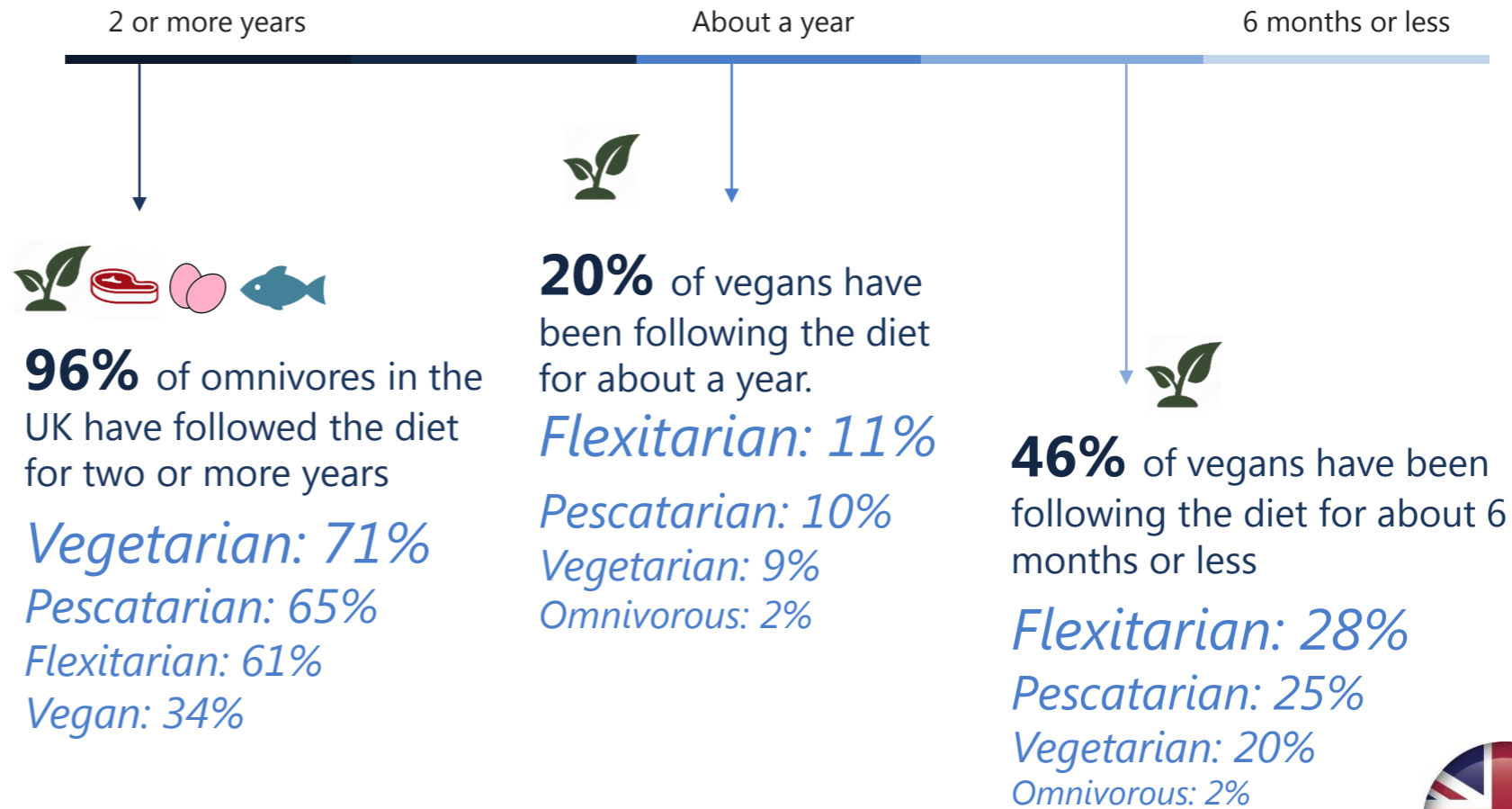


In the UK – following a flexitarian diet allows consumers to tread the middle ground. The consumer can be acknowledged for a conscious effort to reduce meat consumption, which has various health and environmental benefits, without totally giving up meat. Social media certainly plays an important role in the attractiveness of this diet.



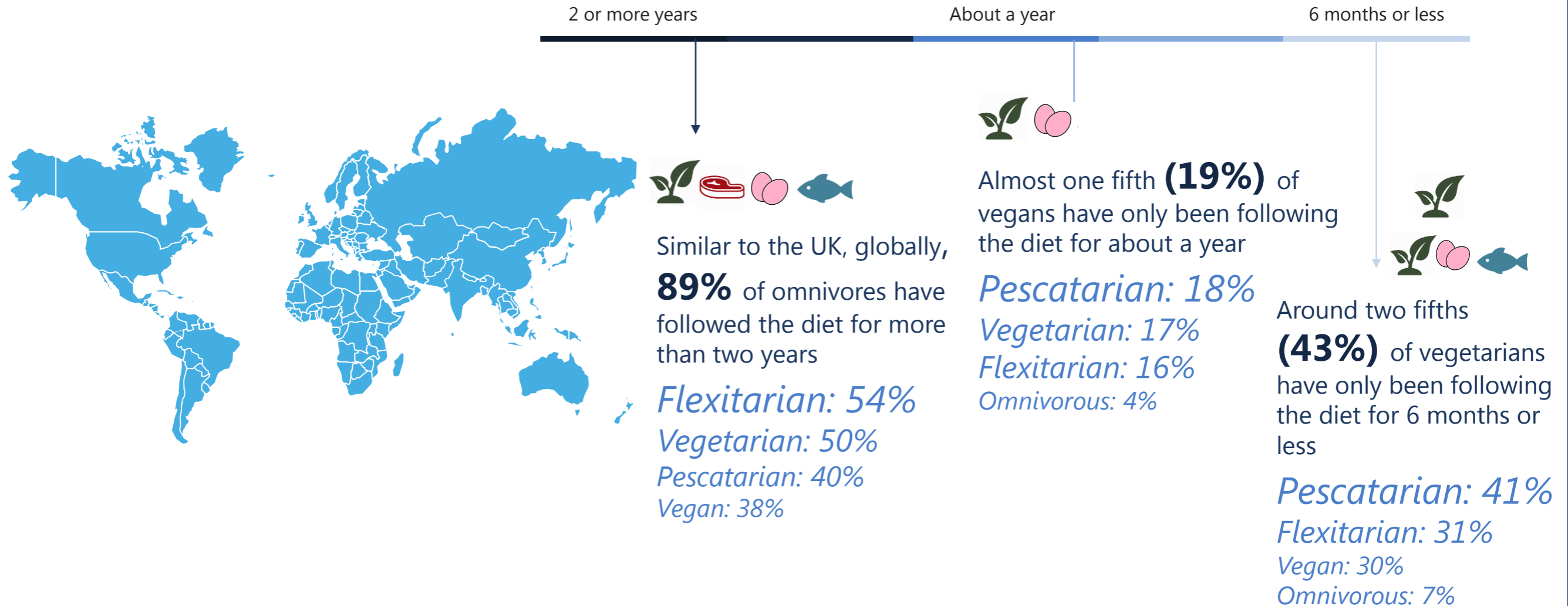
Source: Mintel food and drink report

In the UK, the majority of omnivores have followed the diet for more than two years, and vegetarianism and veganism is often a new diet



Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries
Base: GB n=1000

The global population is similar to the UK. Veganism, vegetarian and pescatarian seems to be a new diet for many who follow them.





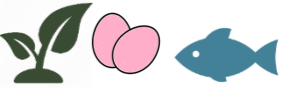


Source: Ipsos MORI Global Advisor Survey. N=20313 28 countries

In the UK, a shift to vegan and pescatarian diets is more established than in the rest of the world



About a month
About 6 months
About a year
2-5 years
More than 5 years

	 Omnivorous n=14911	 Flexitarian n=968	 Vegetarian n=540	 Vegan n=2793	 Pescatarian n=559
About a month	4%	15%	16%	21%	18%
About 6 months	3%	15%	17%	22%	23%
About a year	4%	16%	17%	19%	18%
2-5 years	4%	17%	11%	14%	13%
More than 5 years	85%	36%	38%	24%	27%



About a month
About 6 months
About a year
2-5 years
More than 5 years

	Omnivorous n=746	Flexitarian n=92	Vegetarian n=65	Vegan n=35	Pescatarian n=48
About a month	1%	10%	14%	11%	15%
About 6 months	1%	18%	6%	34%	10%
About a year	2%	11%	9%	20%	10%
2-5 years	2%	24%	3%	14%	17%
More than 5 years	94%	37%	68%	20%	48%

Caution low base sizes

Source: Ipsos MORI Global Advisor Survey. N=14002 28 countries
Base: GB n=1000

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Technical Notes

The findings come from the surveys conducted in 2018 on the Ipsos Global Advisor platform using the Ipsos Online Panel System.

The survey was conducted between February 23rd and March 9th, with 20,313 adults across 28 countries. (Argentina, Australia, Belgium, Brazil, Canada, Chile, China, Colombia, France, Germany, Great Britain, Hungary, India, Italy, Japan, Malaysia, Mexico, Peru, Poland, Russia, Saudi Arabia, Serbia, South Africa, South Korea, Spain, Sweden, Turkey, United States)

All survey respondents are aged 18-64 in Canada and the U.S., and 16-64 in all other countries.

Data is weighted to match the profile of the population.