



Global Views On Food – 2018

What are the world's food habits?

IPSOS GLOBAL ADVISOR

GAME CHANGERS



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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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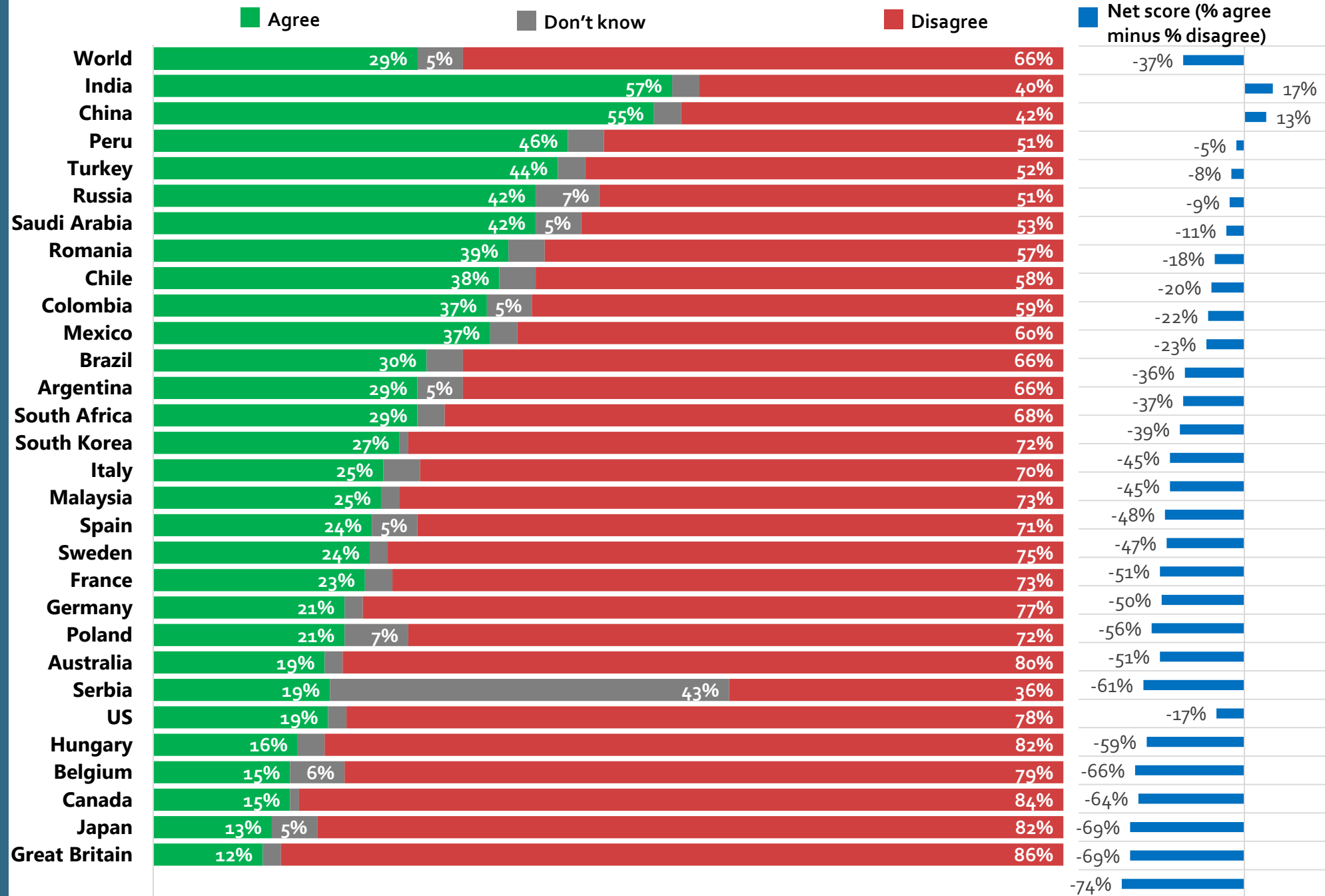


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Eating Organic

- 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.

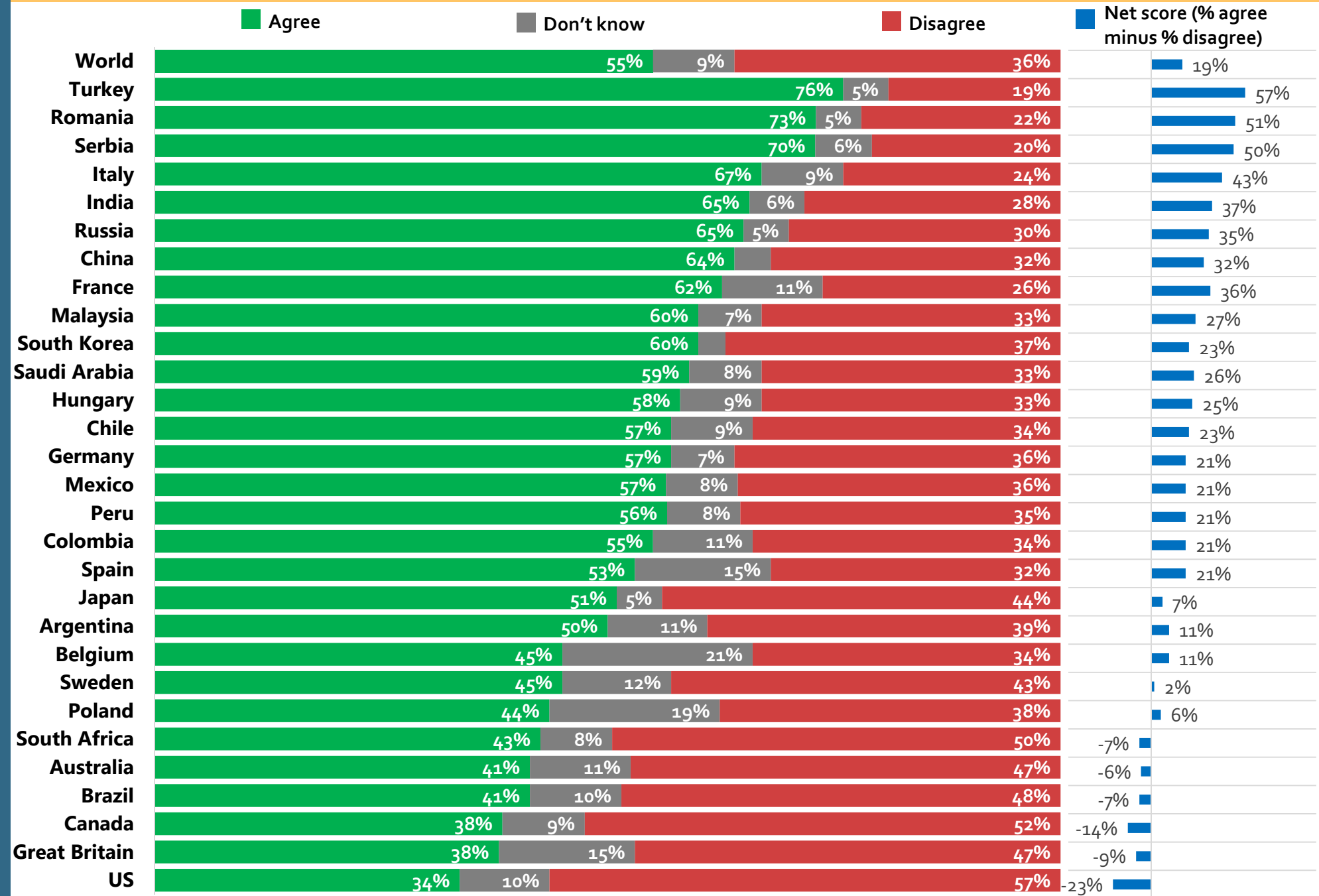


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018
 When this question was asked in Serbia, respondents were given the option to not provide an answer.

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.

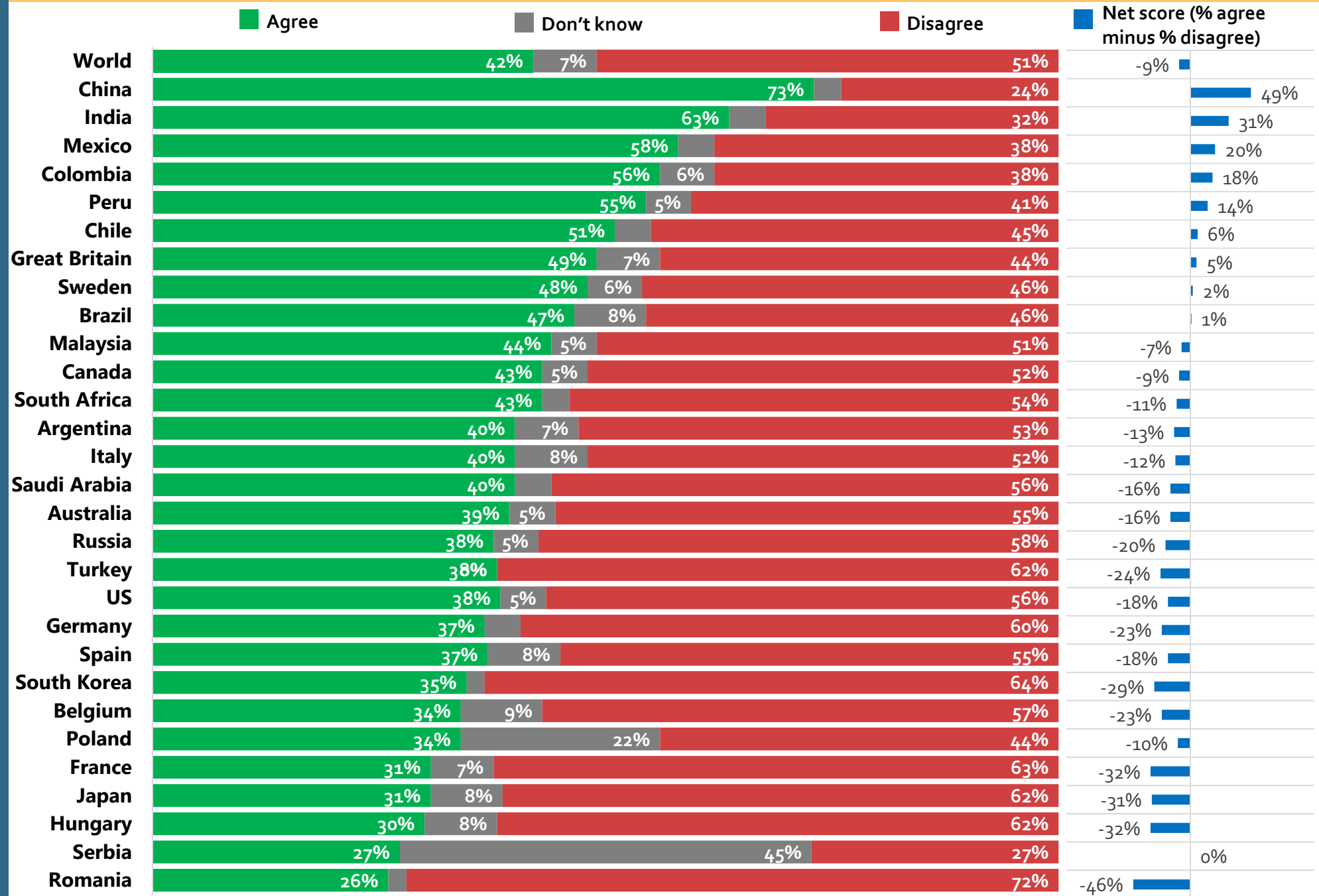


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018
 When this question was asked in Serbia, respondents were given the option to not provide an answer.

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.



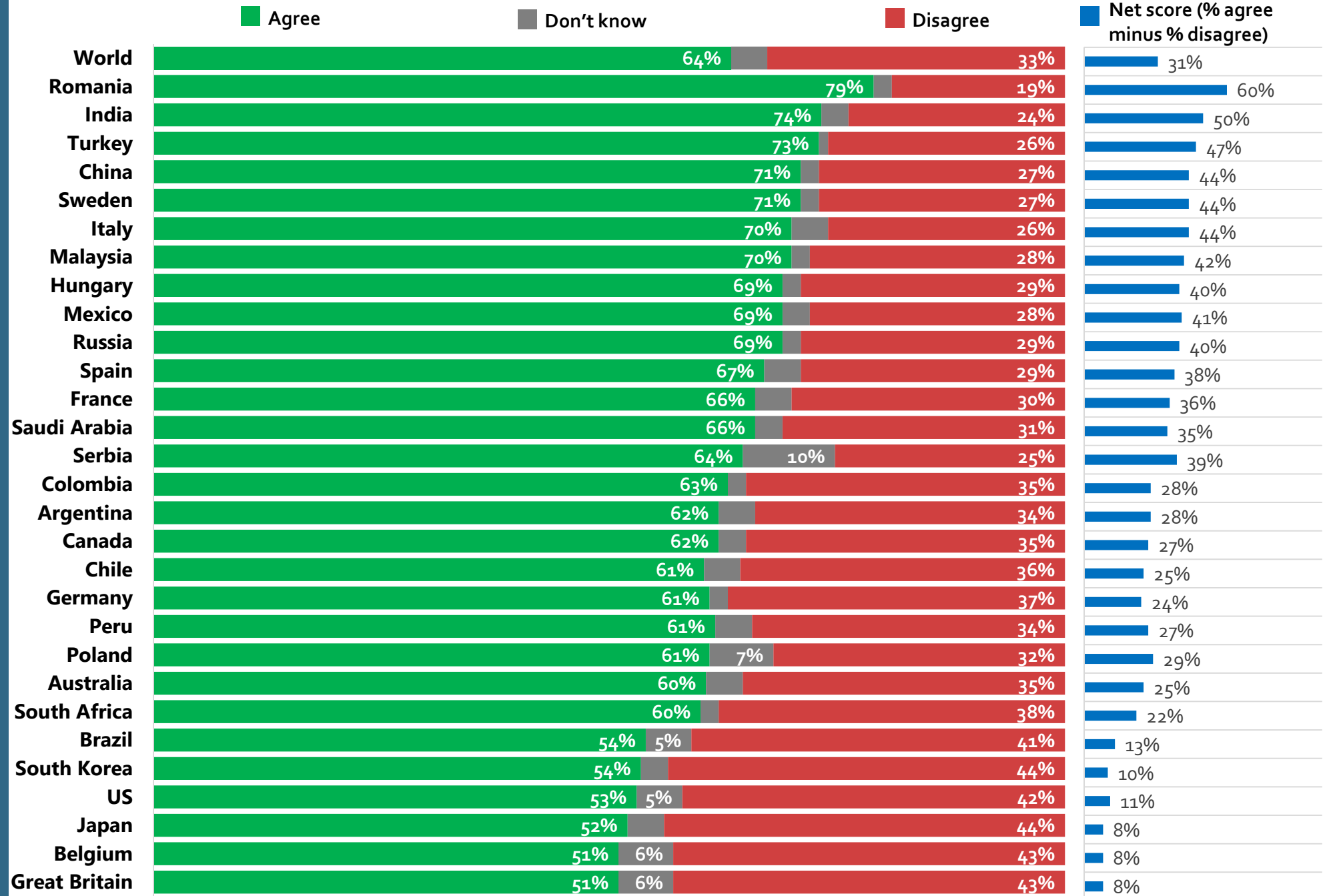
Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

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

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.



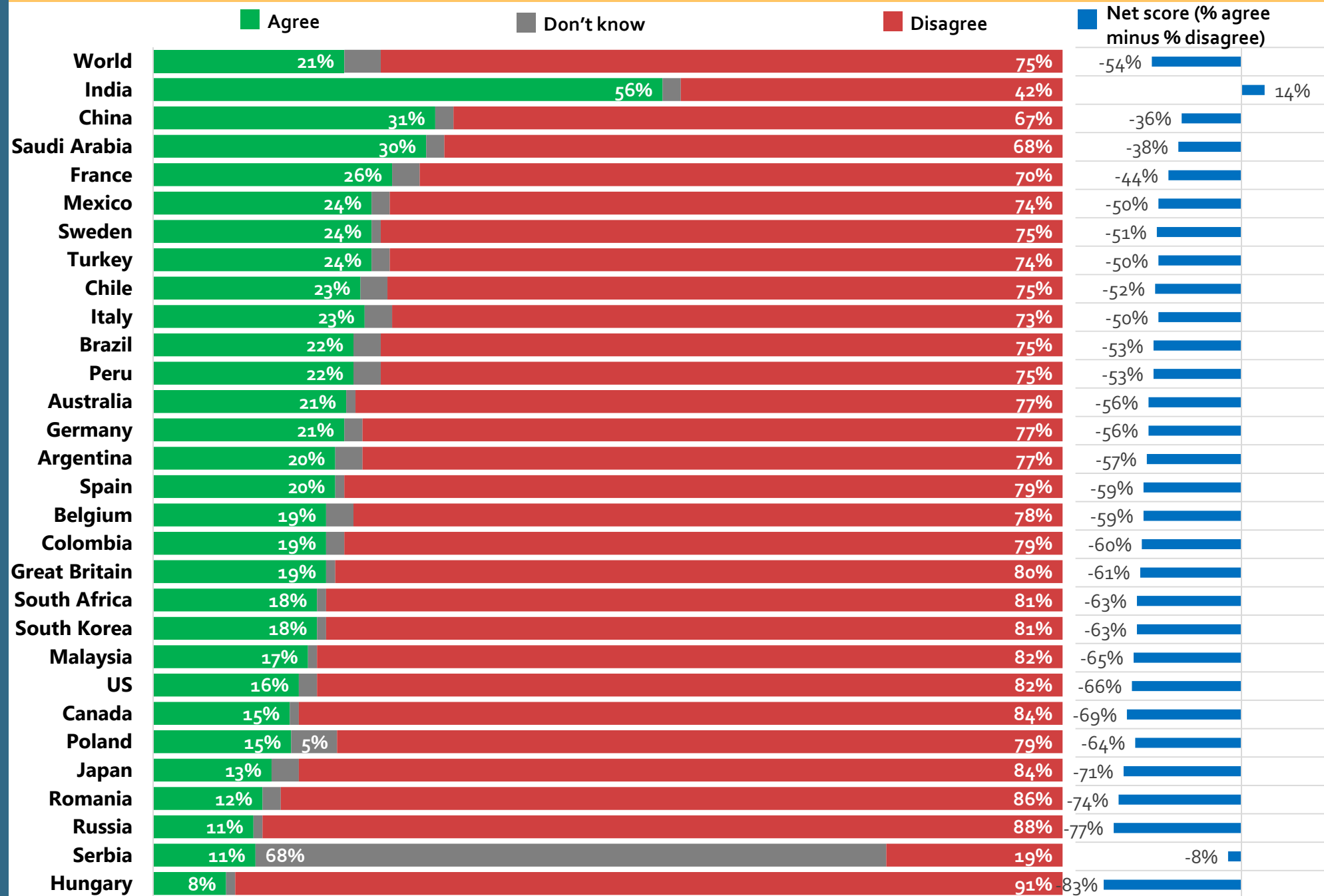
Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

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

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.

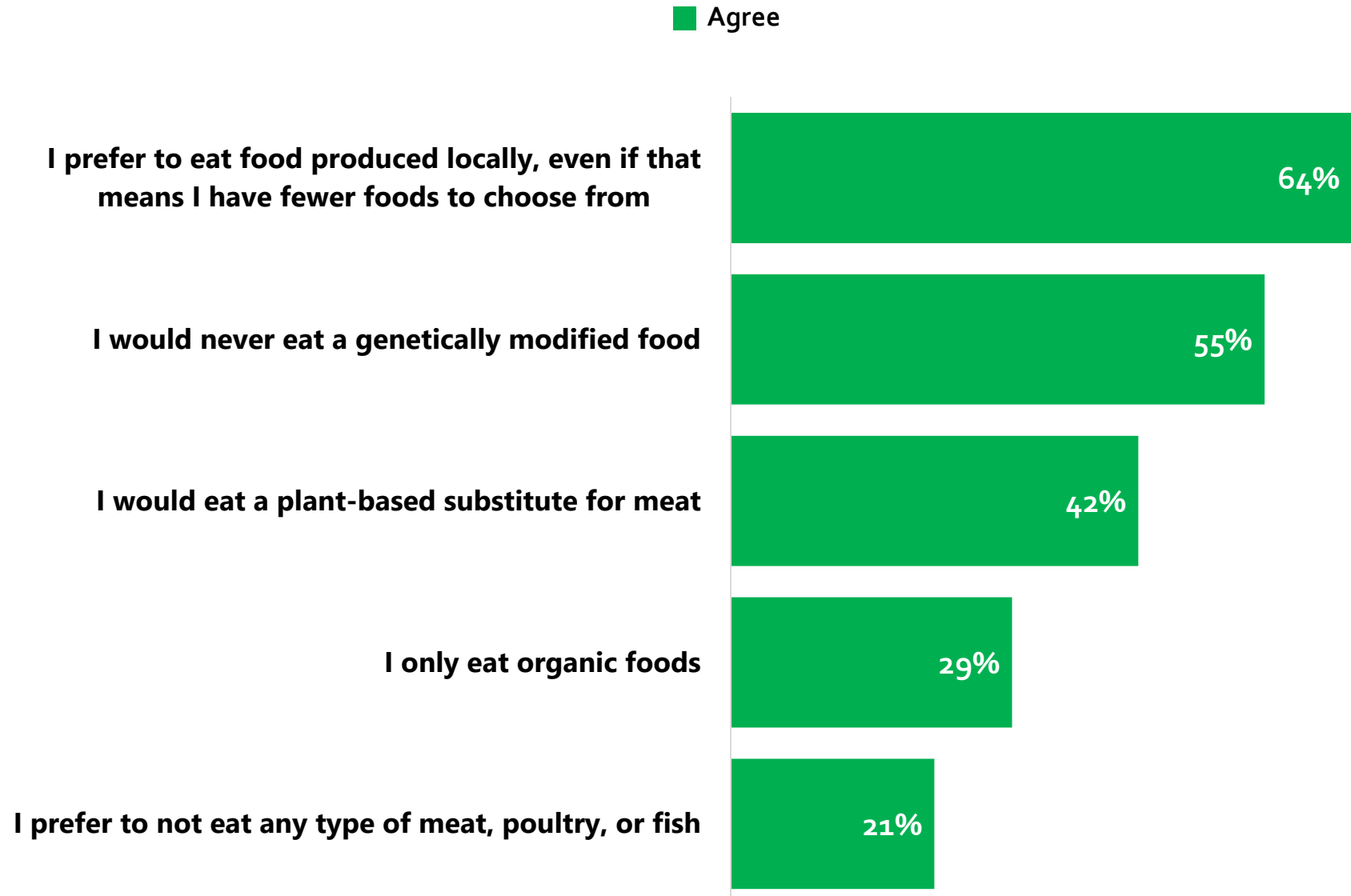


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018
 When this question was asked in Serbia, respondents were given the option to not provide an answer.

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.



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

Food and Weight



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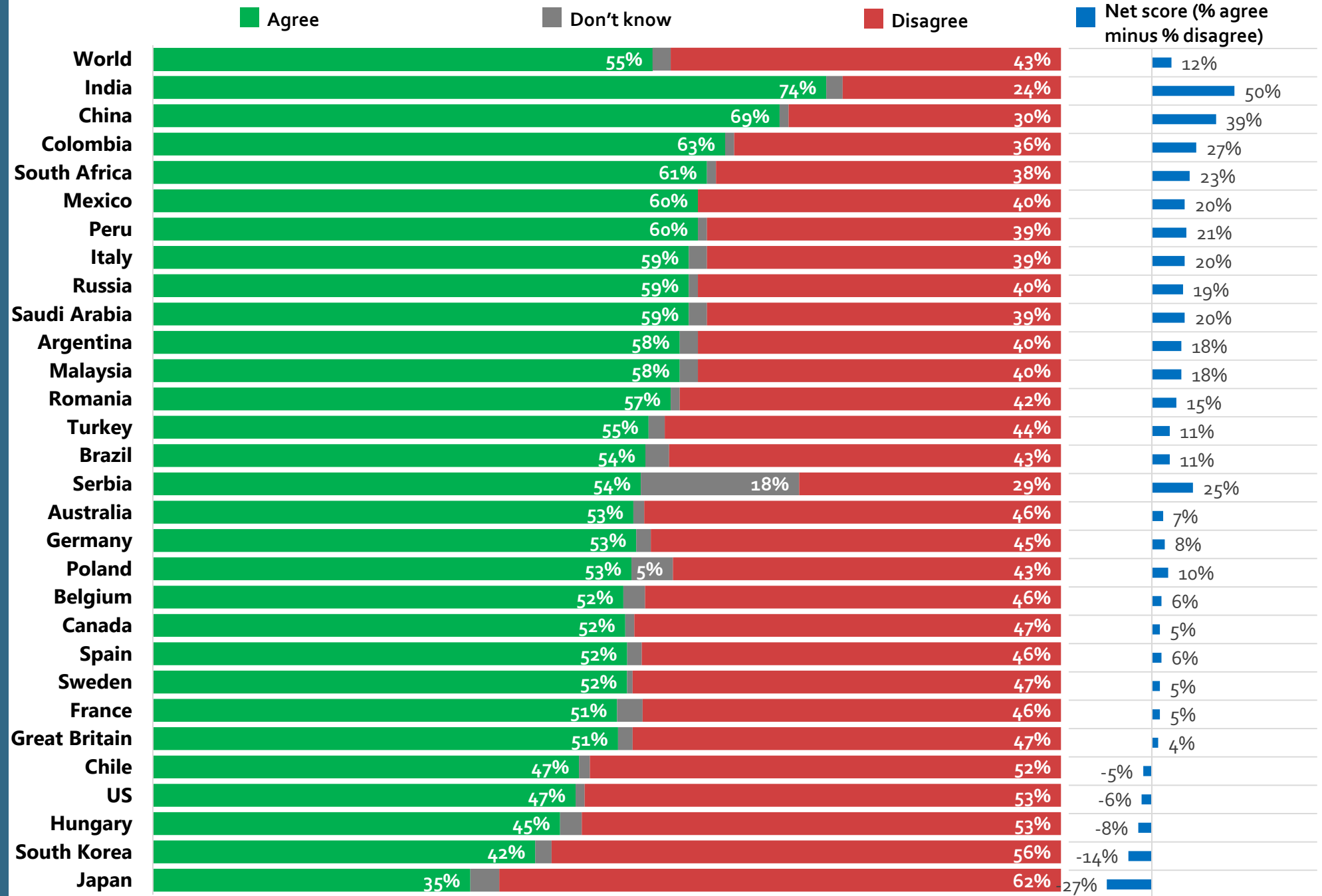


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Weight

- 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.



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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.

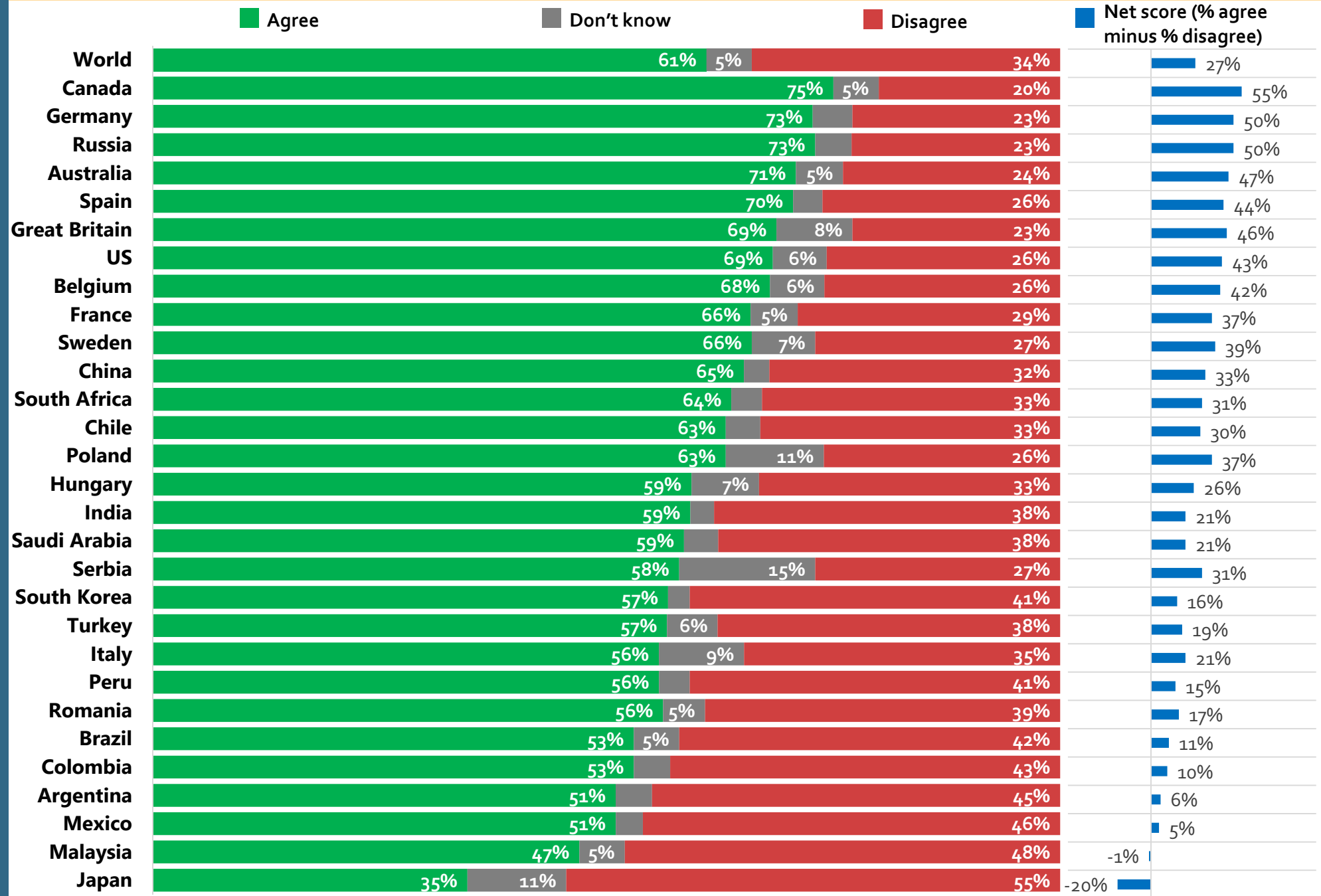


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

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.

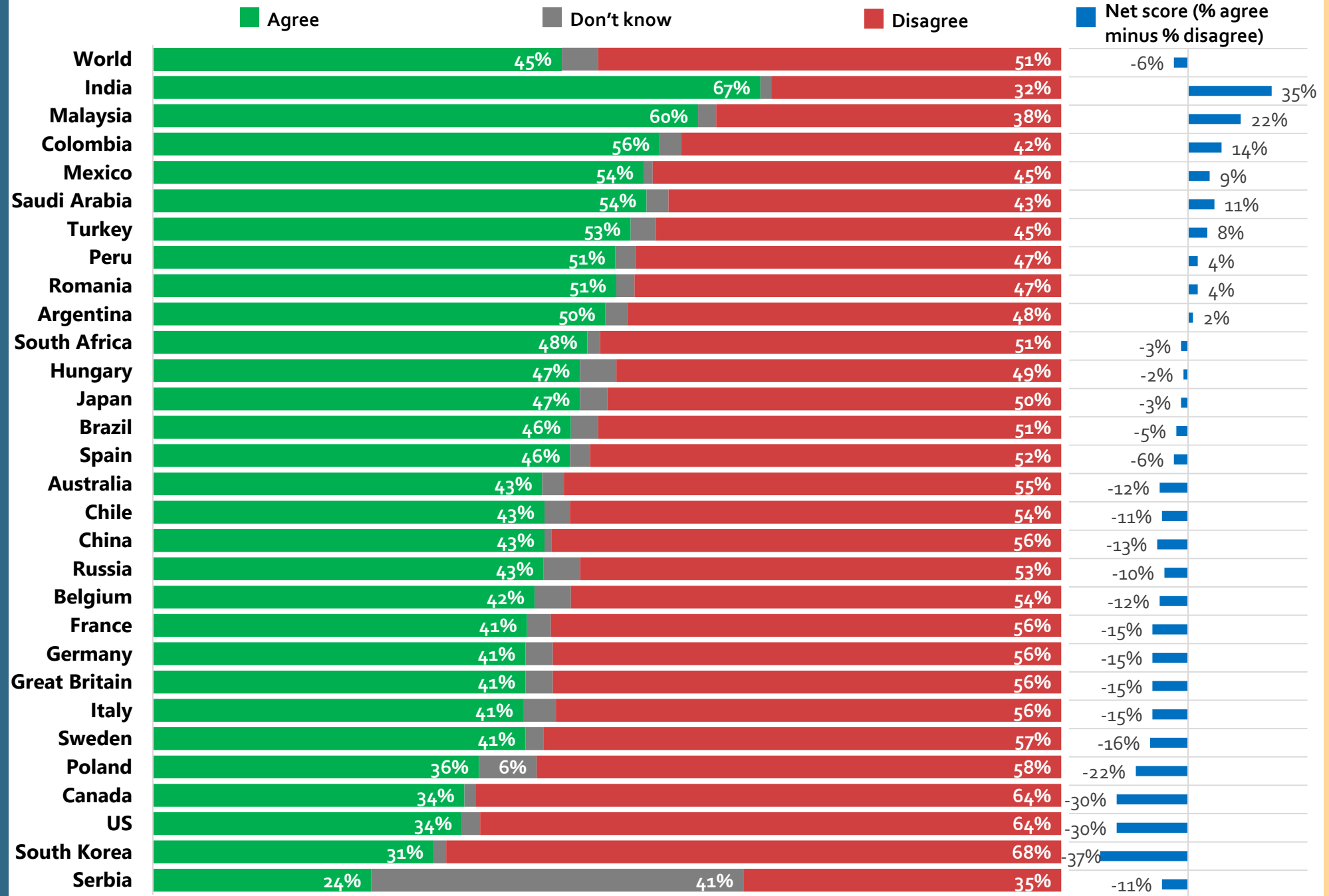


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Exercising to Eat

- 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.

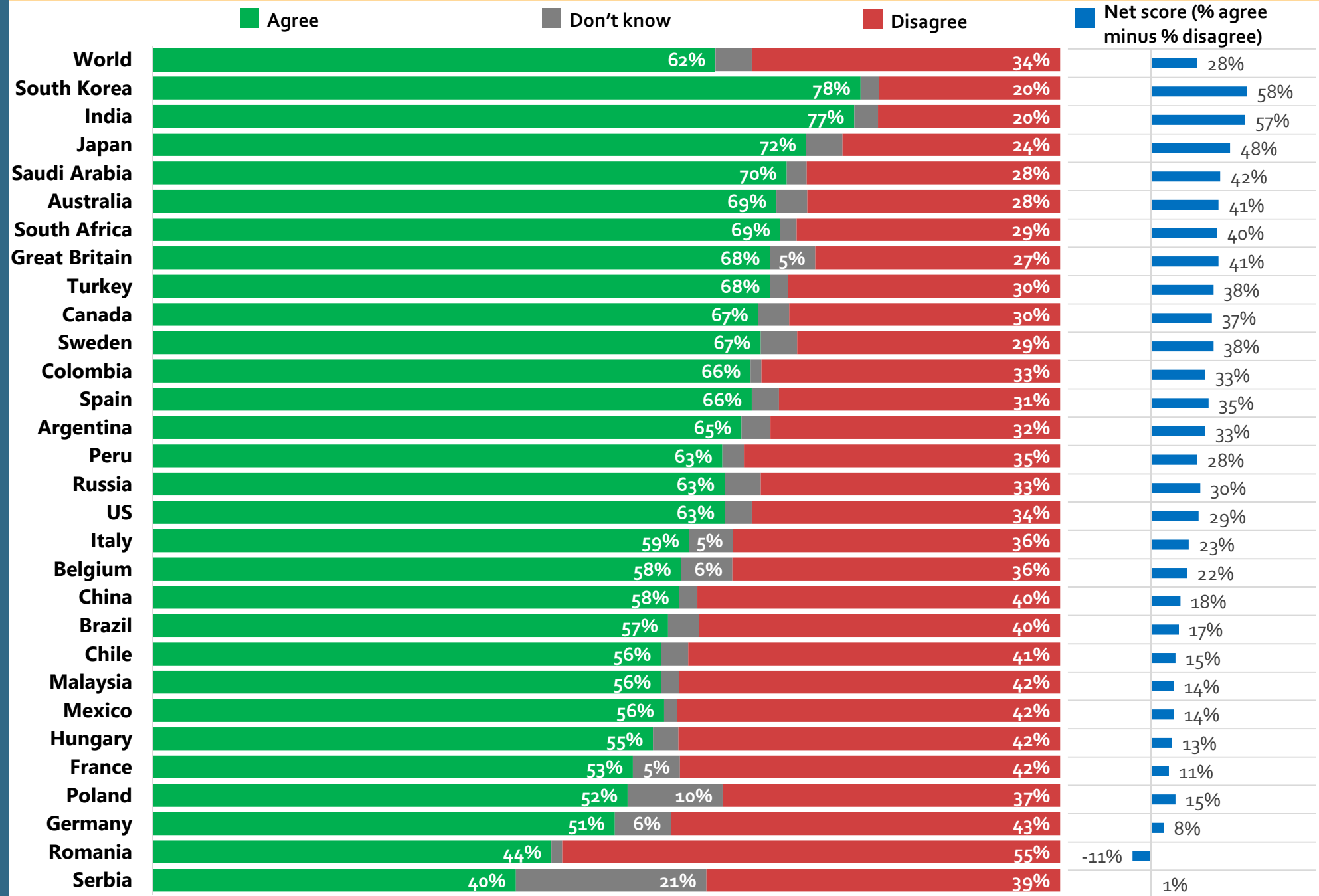


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

Eating Well vs. Gaining Weight

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

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

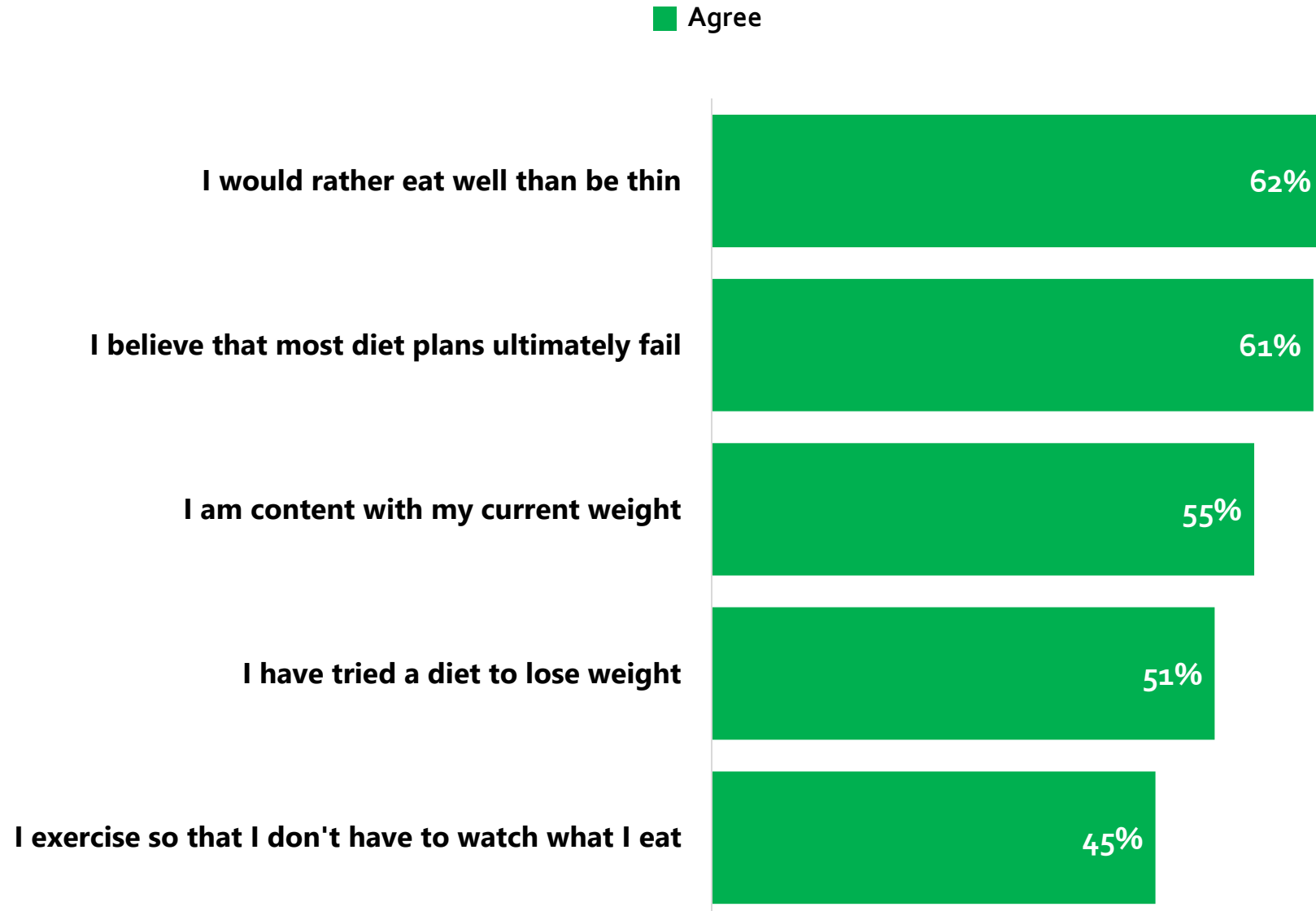


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

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.



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Food Future

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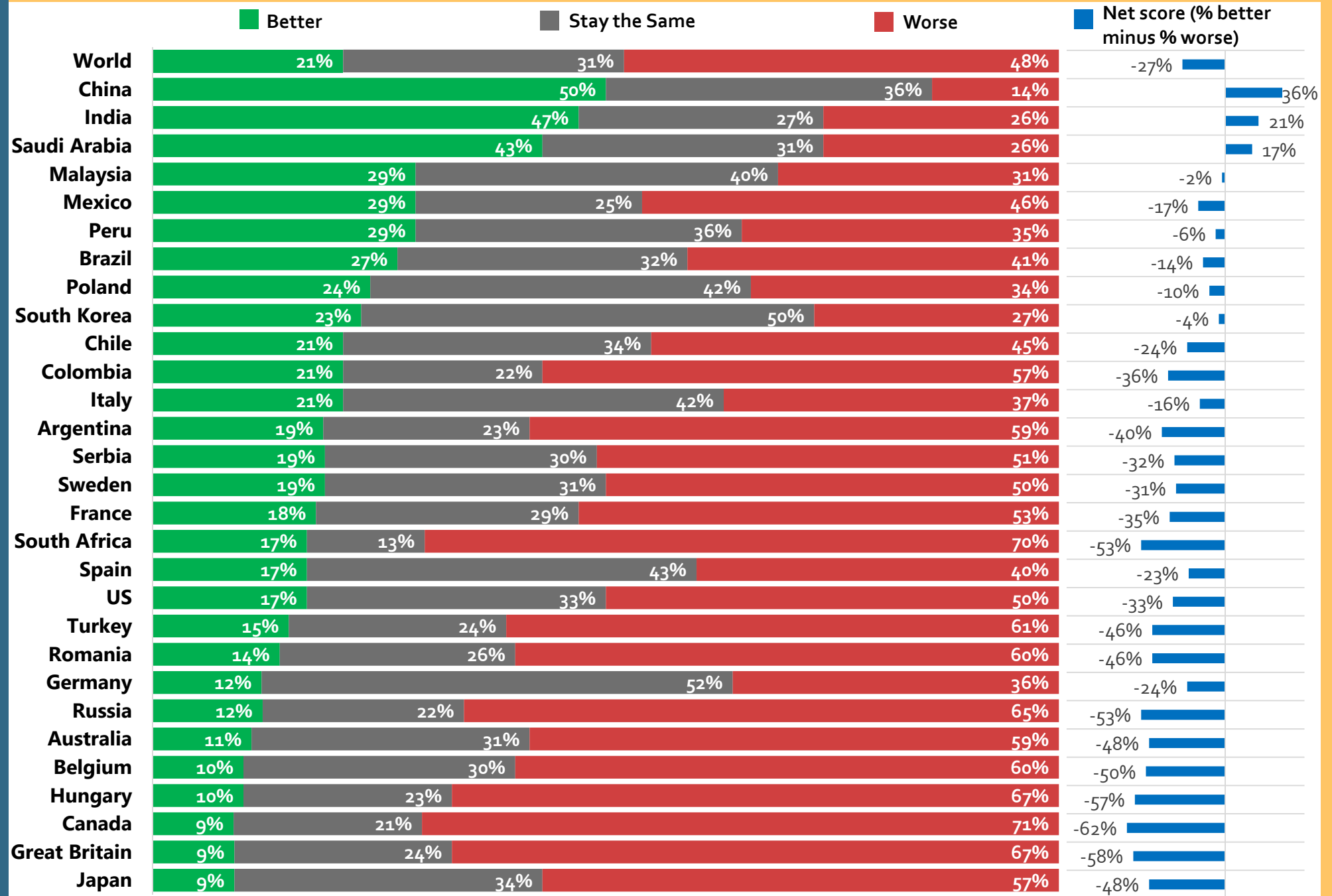


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Food Cost

- 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.

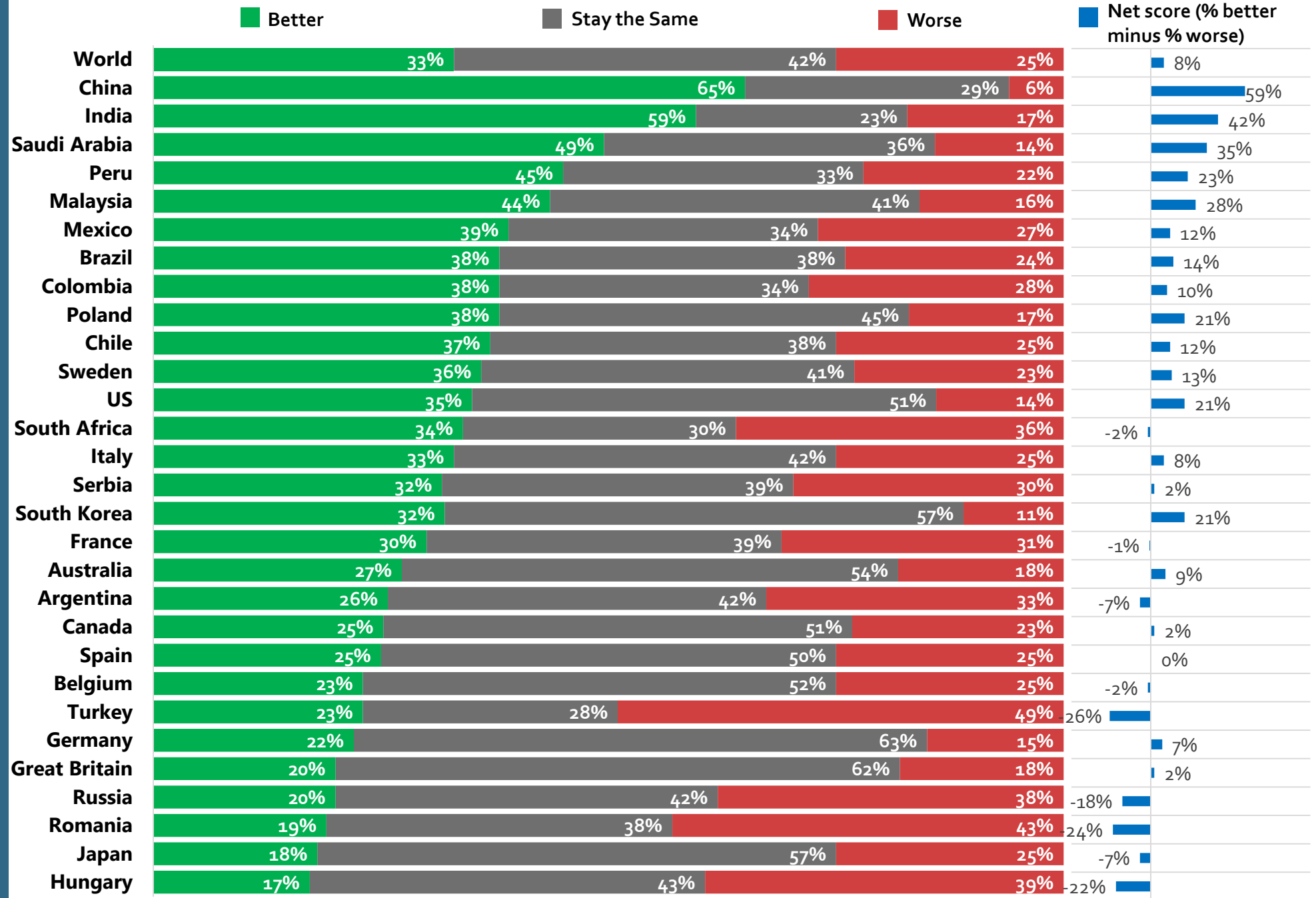


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

Food Quality

- A plurality of the world's citizens believe food quality 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.

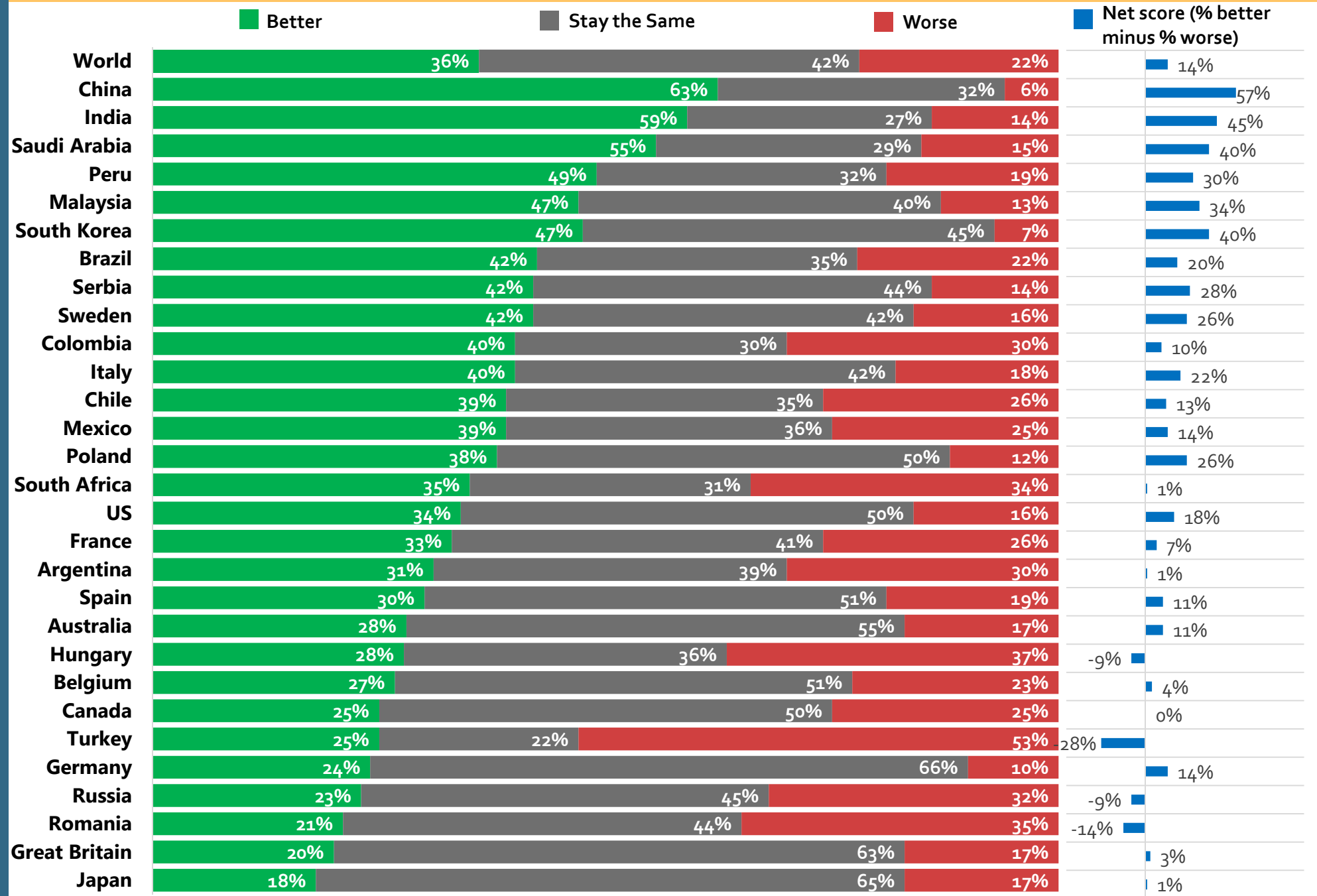


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

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.

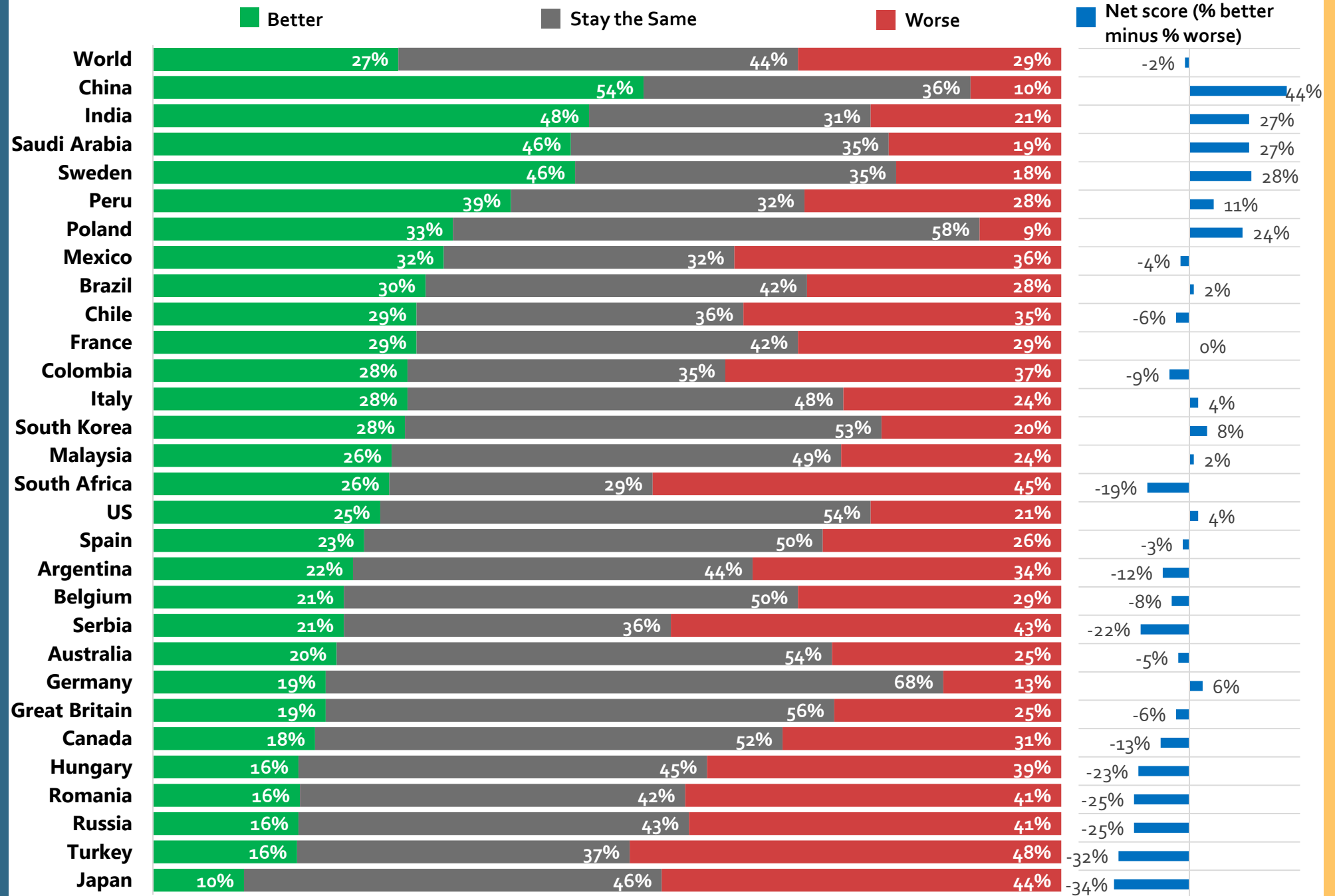


Base: 14,502 online adults aged 16-64 across 29 countries, Aug. 24 – Sept. 7, 2018

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.

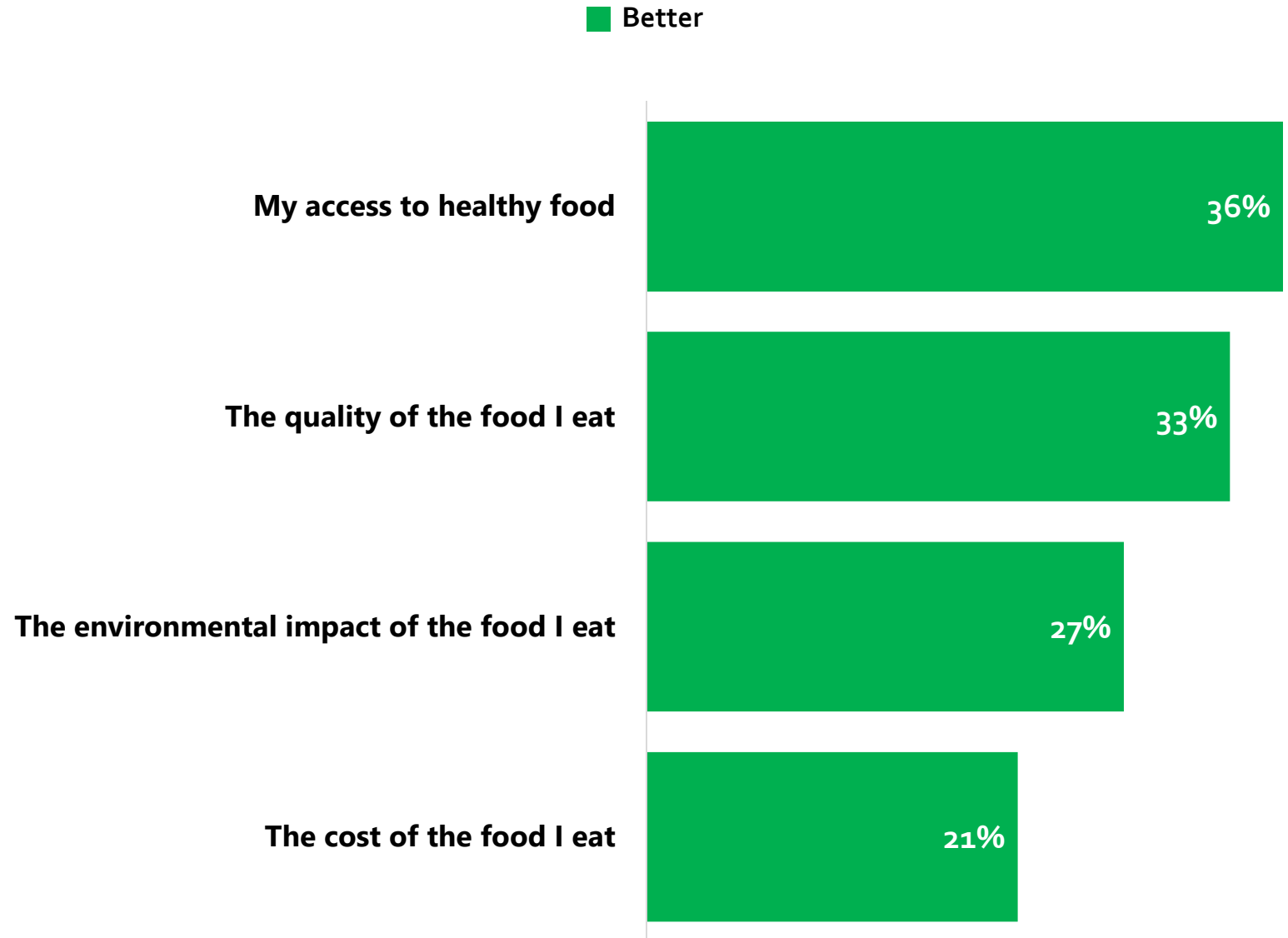


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World Summary

- 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.

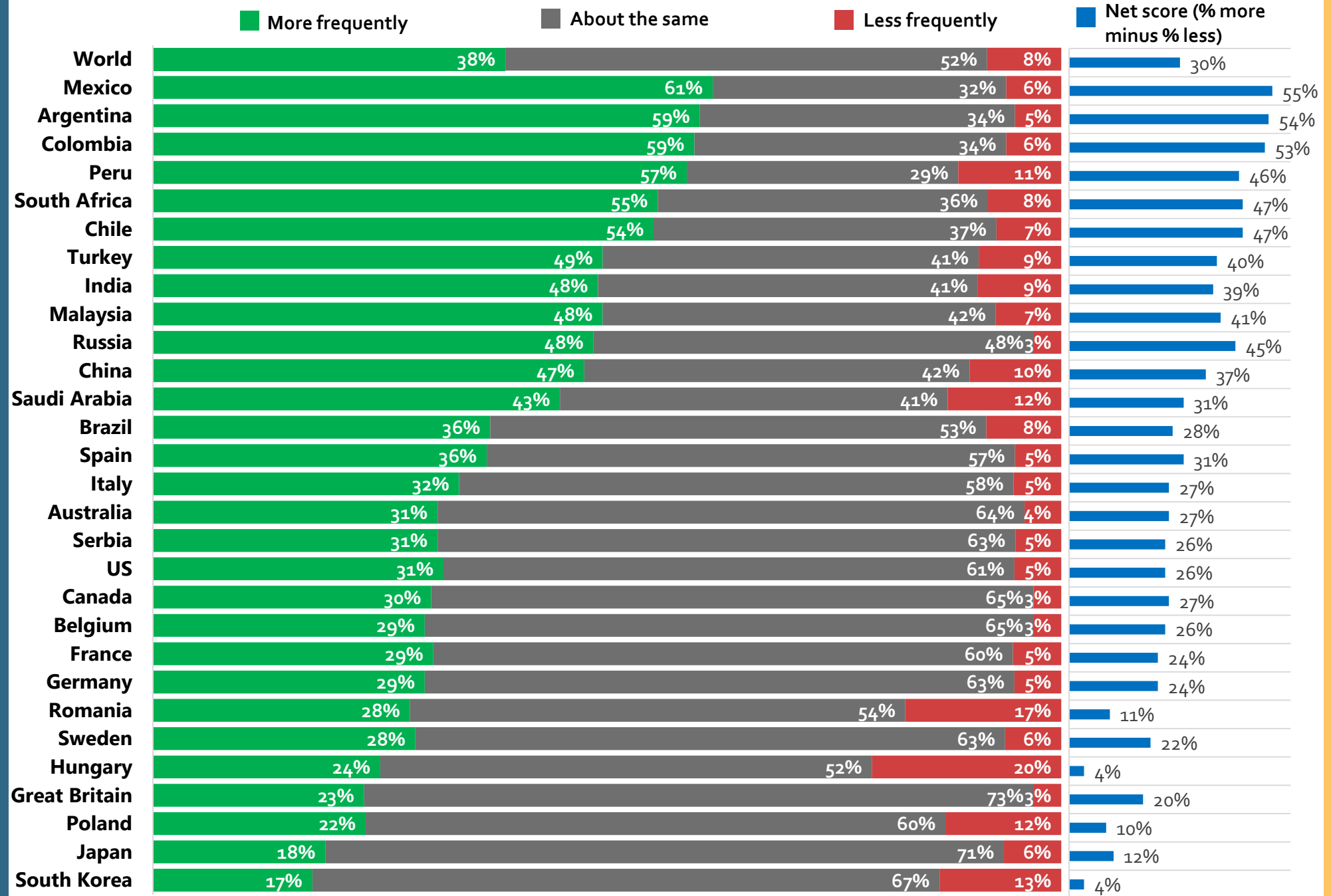


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Meal Preparation

- 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.

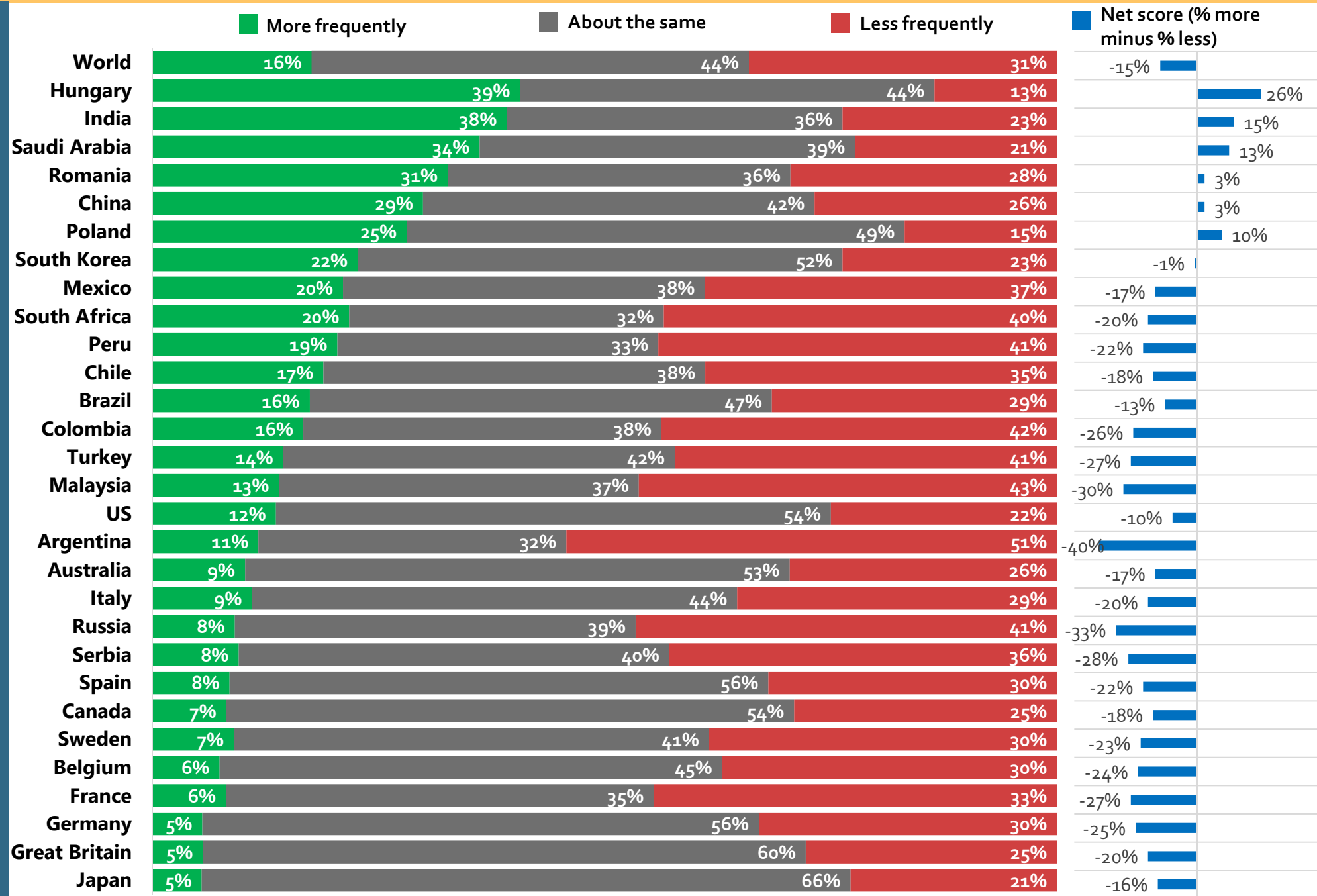
Q4. How do you think the following will change over the next year? – Preparing meals at home.



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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.

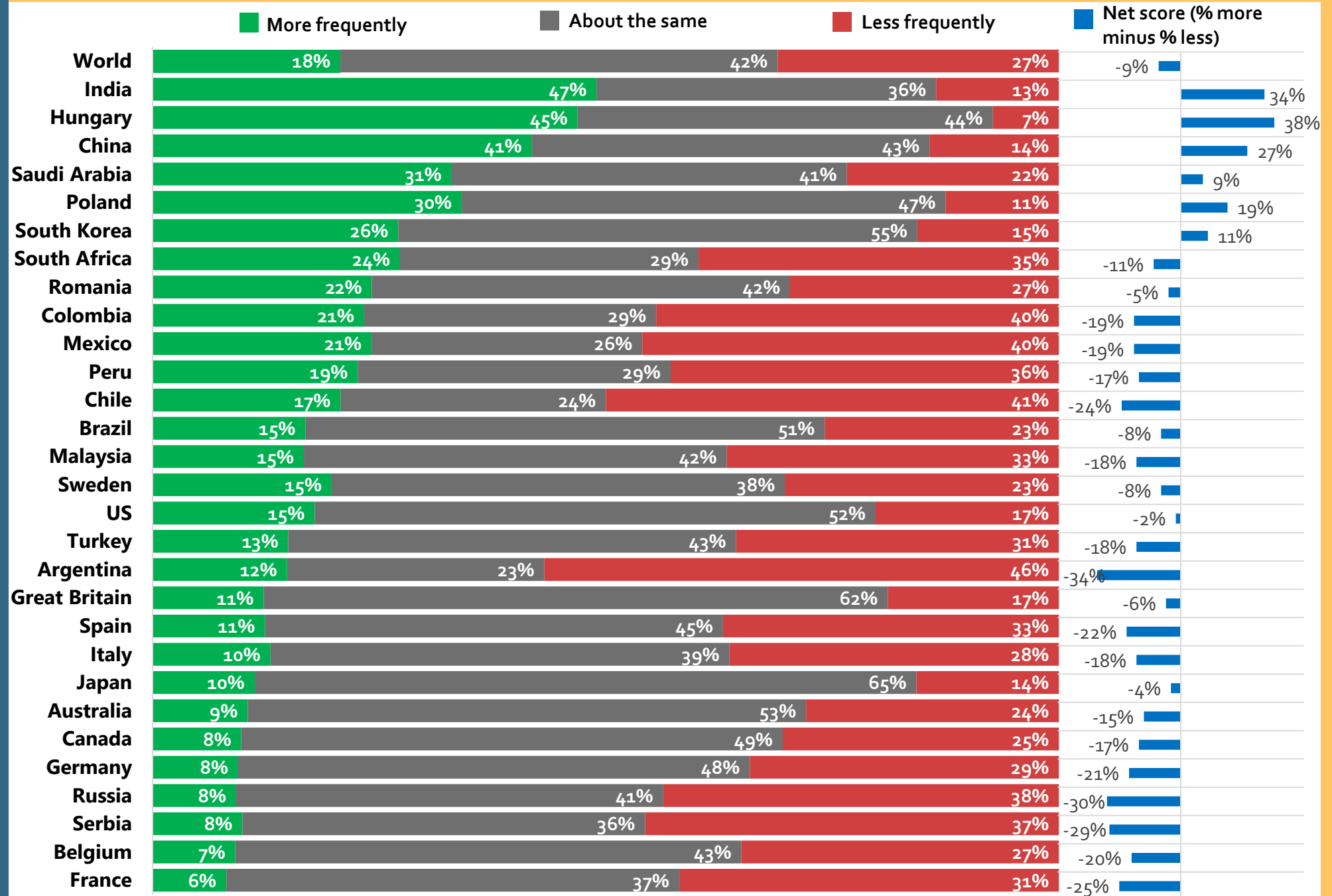


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Grocery Delivery

- 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.

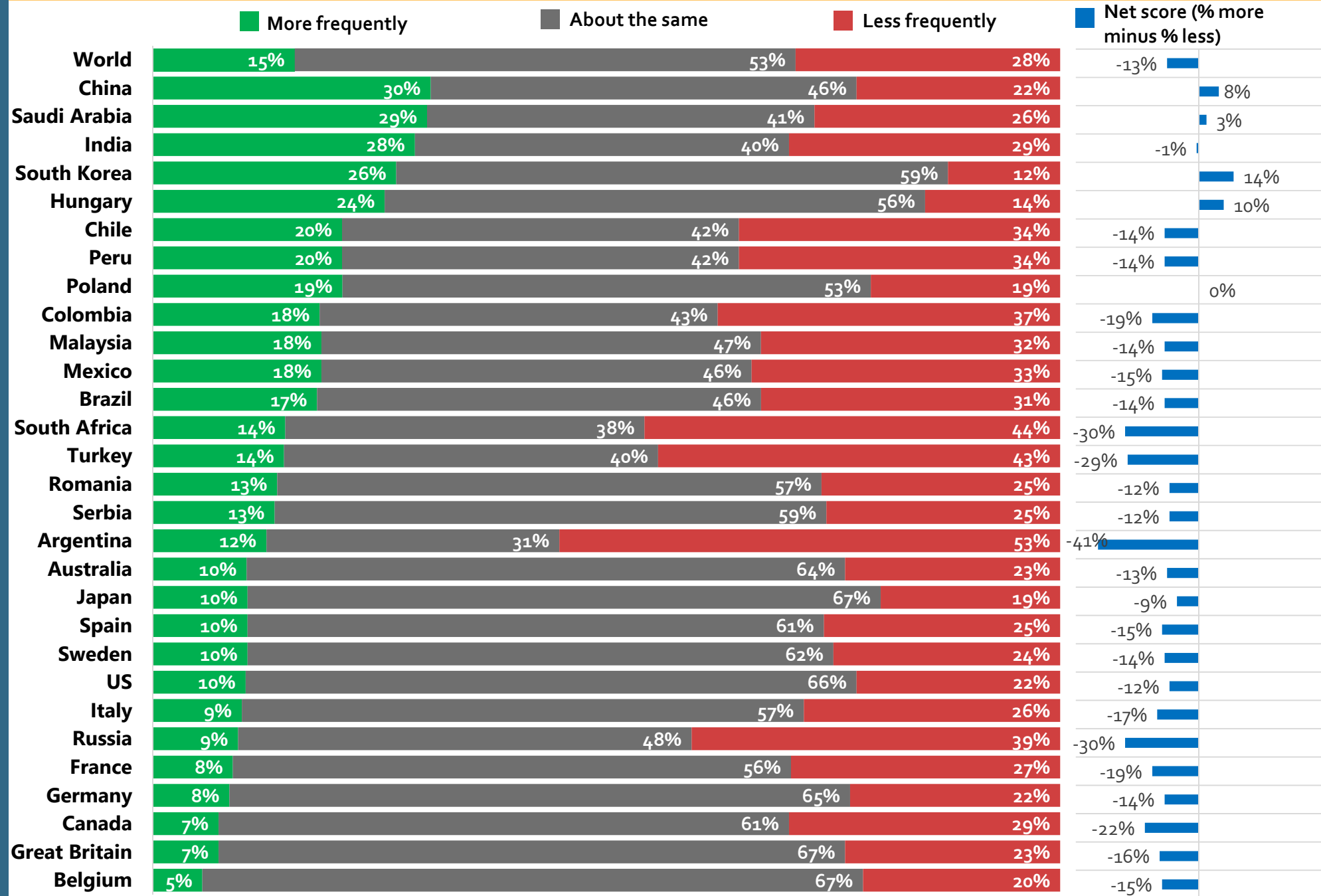


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Dining Out

- 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.

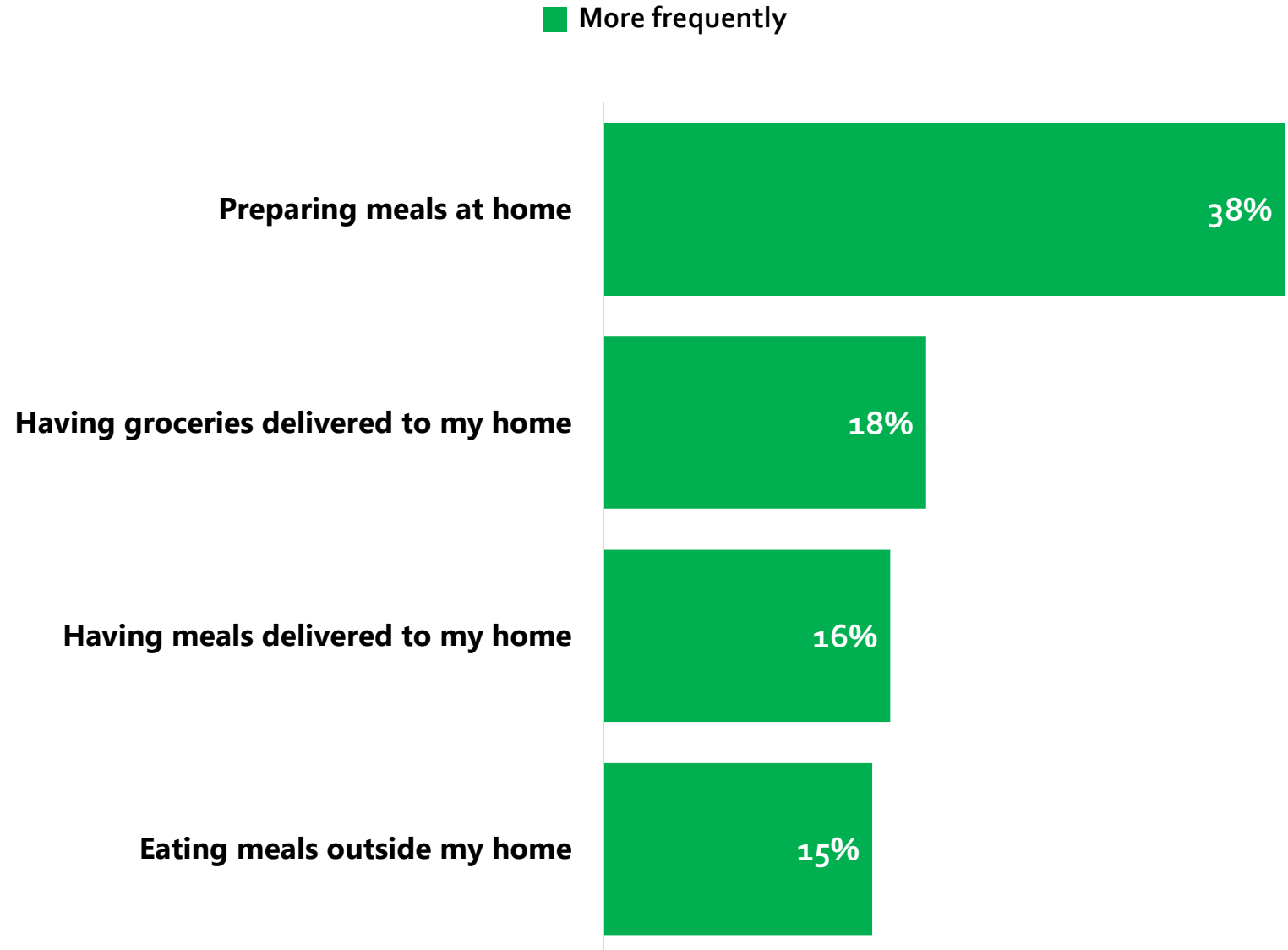


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World Summary

- 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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