

 **Grains
of Truth**
2022



EAT x GlobeScan

A consumer report on healthy
and sustainable food systems

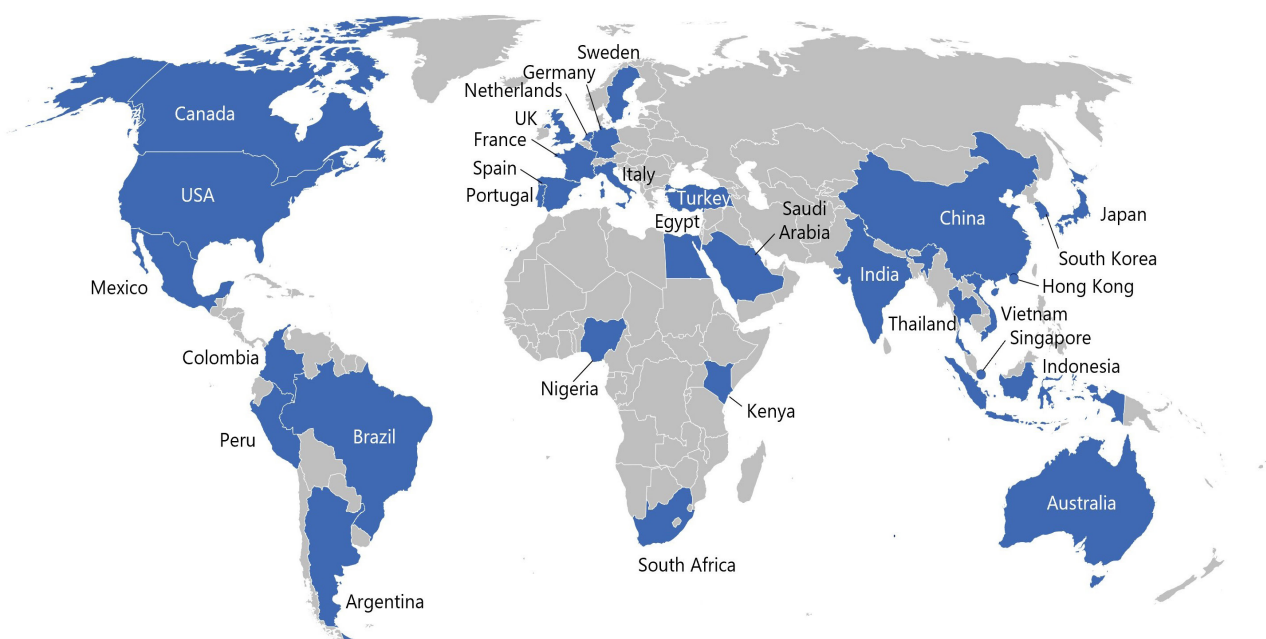


Contents

Methodology	3
Introduction	3
Executive Summary	4
The Broader Context	6
Consumer Attitudes and Behaviours	10
Food Security	13
Responsible and Healthy Food	15

Research Methodology

- Representative online samples of approximately 1,000 adults in each of 31 Markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 850 in Egypt) ($n=29,293$)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June and July 2022
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.



Introduction

For the second year, EAT and GlobeScan have collaborated on developing questions to the public in 31 markets around the world on their concerns about the current food system and access to healthy and sustainable food.

Respondents were asked about whether the price of food you buy on a regular basis has gone up in the last three months, if major world events like the pandemic, climate change, and the war in Ukraine have made them more or less secure about having access to food, how important buying environmentally responsible and healthy food is to them, and if they would be willing to pay more than a regular price for healthy and environmentally responsible food given the current economic circumstances.

This report presents the insights gained from this research, with the hope of contributing to the transformation of the global food system.

Executive Summary



The Broader Context

Although issues like war and climate change dominate concerns globally, people also rate food shortages as a top worry when asked to rate the seriousness of a list of global challenges. As people increasingly feel personally impacted by climate change, many cite increased food prices as one of the ways that climate change is having an adverse impact on their lives.

- Majorities in 23 out of 31 countries and territories surveyed say that food shortages are a “very serious” global problem. People in Latin America and Africa are most likely to be highly concerned, with over eight in ten in Columbia, Peru, Kenya, Mexico, Brazil, Argentina, and South Africa saying they are worried about food shortages. People in China, Hong Kong, South Korea, and Japan express the weakest levels of concern about this issue.
- The proportion of people that feel greatly affected personally by climate change has increased year over year, with more than one-third now feeling greatly affected. At the same time, the proportion feeling greatly affected by the COVID-19 pandemic has declined. Many of those affected by climate change say they have been impacted through higher food prices; in 23 out of 31 countries and territories surveyed, more than half of those affected by climate change say the increased cost of food has been one of the ways they were impacted.

The Take-away: Consumers are very concerned with a range of issues including climate change and food shortages, and they are increasingly making the connection between these issues. As people increasingly understand that the most serious challenges that we face including food insecurity and climate change are highly interconnected, they will expect more holistic solutions and approaches.

Consumer Attitudes and Behaviors

Against a backdrop of rising food insecurity and increasing prices, a promising majority of consumers say they eat healthy food most or all of the time. A small but growing number of people say they are frequently eating vegetarian or vegan diets, but as many as four in ten people believe that in the next decade most people will probably be eating mostly plant-based diets.

- More than one in five consumers (22%) now say that they eat plant-based or vegan food, up from 17 percent in 2019. Eating only plant-based food has increased significantly across many important markets compared to before the pandemic, including the UK and the USA.
- Interest in trying plant-based diets is also significant, especially among younger age groups, with 40 percent of Gen Z, 43 percent of Millennials, 37 percent of Gen X, and 28 percent of Baby Boomers saying they are very interested in trying this way of eating.
- However, there are significant gaps in some countries between those who are interested in switching to a plant-based diet and those who are already doing this. The largest gaps are in Vietnam (38 percentage points), Thailand (36 percentage points), and Brazil (22 percentage points). At the global level, younger generations also have a larger aspiration-action gap.
- Looking toward the future, more than four in ten people (42%) say that in the next ten years most people will definitely or probably be eating plant-based food instead of meat. Younger people are more likely to think this shift will happen, as are those living in Africa and Asia. North Americans and Europeans are the least optimistic about a large-scale shift toward vegetarian eating.

The take-away: Although people mostly say that they are already eating a healthy diet, plant-based diets are embraced by only a small proportion of consumers. However, the trend – while slow – shows that increasing uptake of plant-based eating habits and interest vs frequency of vegetarian eating suggests a large opportunity to facilitate plant-based eating at scale.

Executive Summary Cont'd

Food Security

Reflecting the soaring inflation across the world, as many as 92 percent of the public say the price of their regular food shopping has increased in the last three months. Although many also feel less secure about having access to food because of additional challenges of the pandemic, climate change, and the war in Ukraine, perceptions of whether these issues affect food security vary widely.

- There is overwhelming agreement in almost all countries and territories surveyed of increased costs of the food that people regularly buy, although Chinese consumers are less likely than those in other places to say that prices have gone up.
- Compounding an overall sense of weakened food security in the context of inflation, just over half of people globally also say that major world events like the pandemic, climate change, and the war in Ukraine have made them less secure about having access to food. People in Kenya, Brazil, Colombia, and Peru are most likely to say they feel less secure, while those in India, Saudi Arabia, Egypt, Vietnam, and China are far less prone to experience a lack of food security in the context of these issues.

The take-away: While there tends to be almost universal agreement that inflation has affected the price of food, there is considerable variation across the countries and territories surveyed about perceived food security in the face of challenges like the pandemic, climate change, and the war in Ukraine. Although the public is increasingly understanding how these issues connect to food security, perspectives and expectations around these issues will differ dramatically by geography.

Responsible and Healthy Food

Consumers agree that buying responsible and healthy food is important. Even in the context of soaring costs of living, most also say they would pay a premium for environmentally responsible and healthy food.

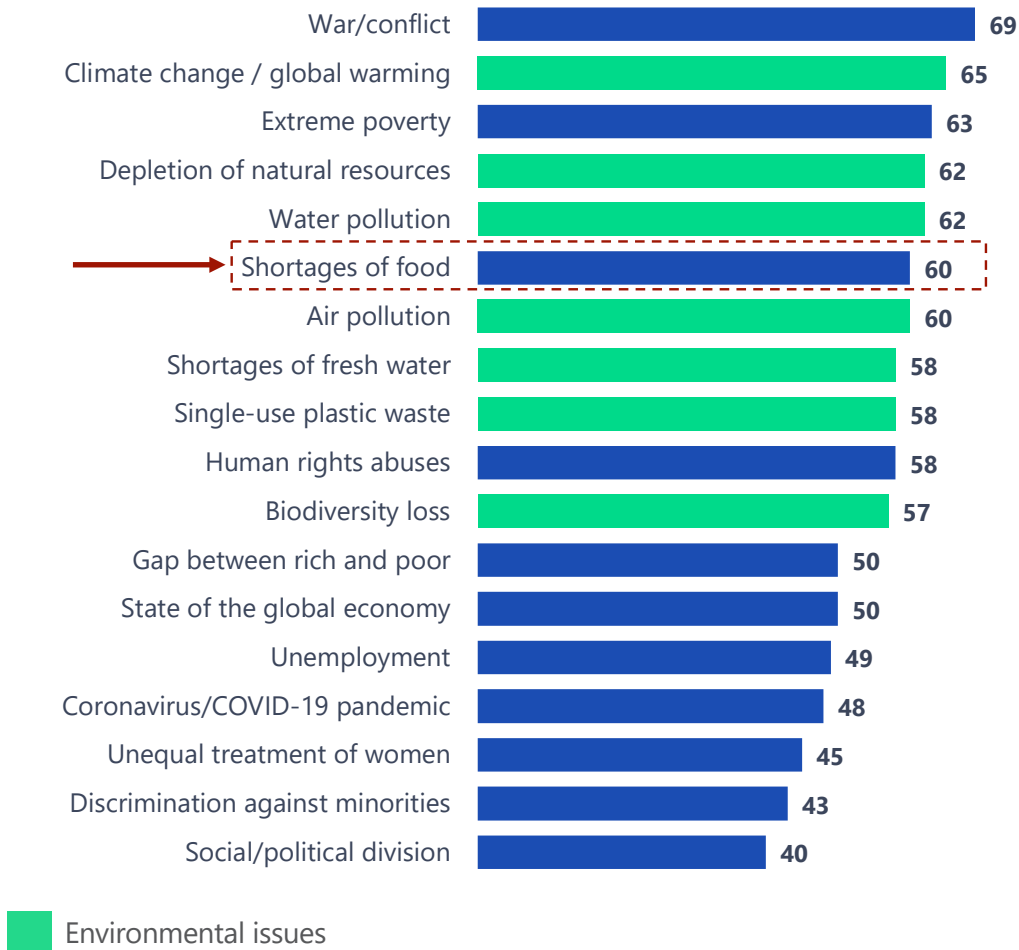
- Nearly nine in ten consumers say that buying environmentally healthy and responsible food is important to them. While there is almost universal agreement in most countries and territories surveyed, consumers in the UK and Sweden are less likely to agree (although three-quarters still say it is important).
- Almost two-thirds of consumers claim they are willing to pay more for healthy and environmentally responsible food given the current economic circumstances, while about one-third say they are unwilling to do so. Willingness to pay more varies significantly across countries and territories surveyed, with consumers in Vietnam expressing the most enthusiasm. Those in India, Thailand, Indonesia, and China are also predominantly likely to claim they would pay more. In contrast, consumers in Japan, The Netherlands, Canada, and Portugal are the least likely to say they would pay a premium for healthy and environmentally responsible food, given the current economic circumstances, with fewer than half agreeing in these markets.
- Men are more likely than women to claim they would pay more for healthy and environmentally responsible food, as are Gen Z and Millennials. Not surprisingly, those with higher incomes and education are also much more ready to pay a premium, as are consumers residing in urban areas. However, all these demographic groups express similar levels of perceived importance of buying healthy and responsible food, suggesting many likely would pay more if they had the capacity to do so.

The take-away: The relatively strong claims of willingness to pay more for healthy and responsible food is an indication of the value consumers place on these goods even against the backdrop of the rising cost of living. However, the gap between the stated importance of buying healthy and responsible food and the capacity people have to pay a premium for such offerings in the current economic context highlights the issue of affordability as a crucial aspect of transforming the food system.

The Broader Context

Worries about war and conflict and climate change now dominate global concern, but worries about food shortages are also top of mind

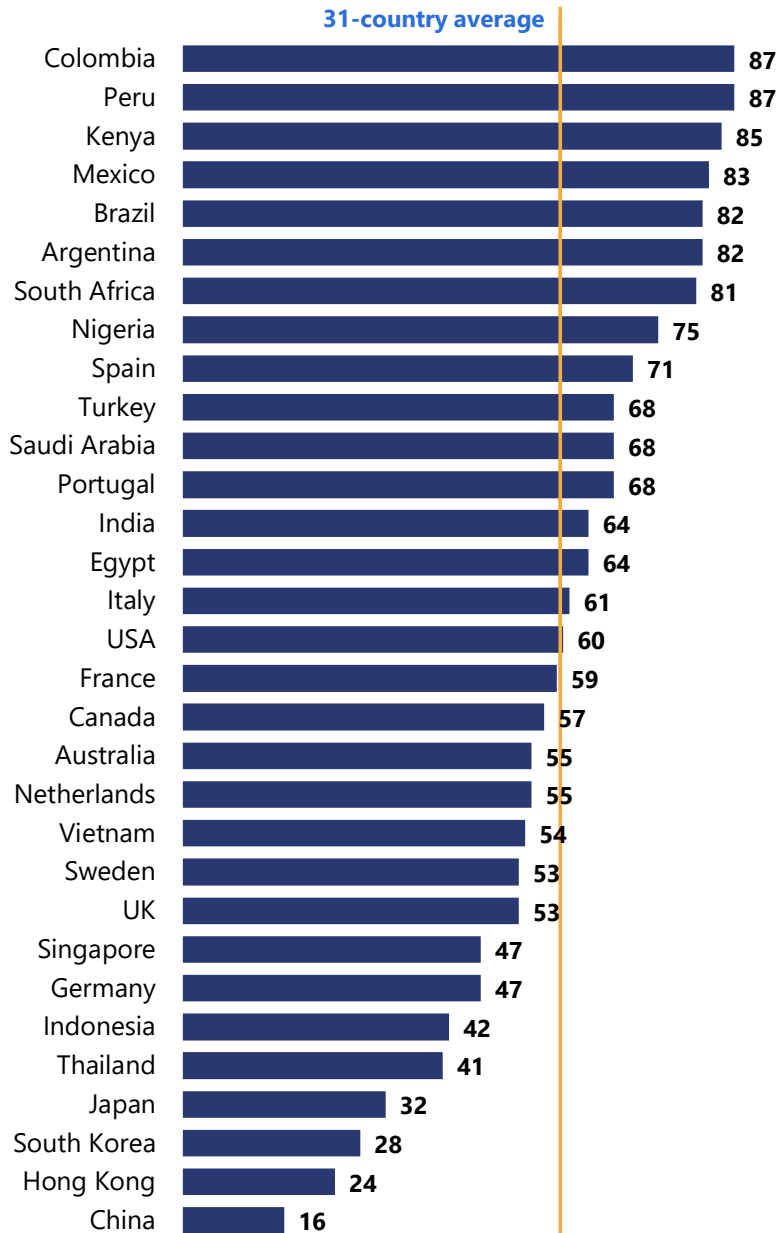
Perceived Seriousness of Global Problems, "Very Serious," Average of 31 Countries, 2022



T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem.

Shortages of food are generally perceived to be a serious problem around the globe, particularly in Latin American countries

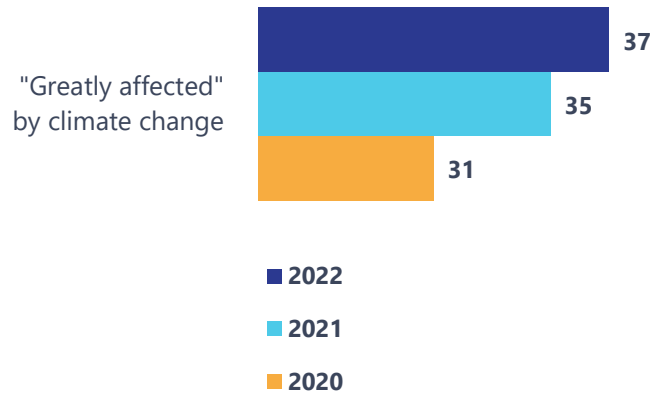
Perceived Seriousness of Food Shortages, "Very Serious," by Country, 2022



T1. For each of the following possible global problems, please indicate if you see it as a very serious, somewhat serious, not very serious, or not at all serious problem. – Shortages of food

People continue to feel increasingly personally affected by climate change

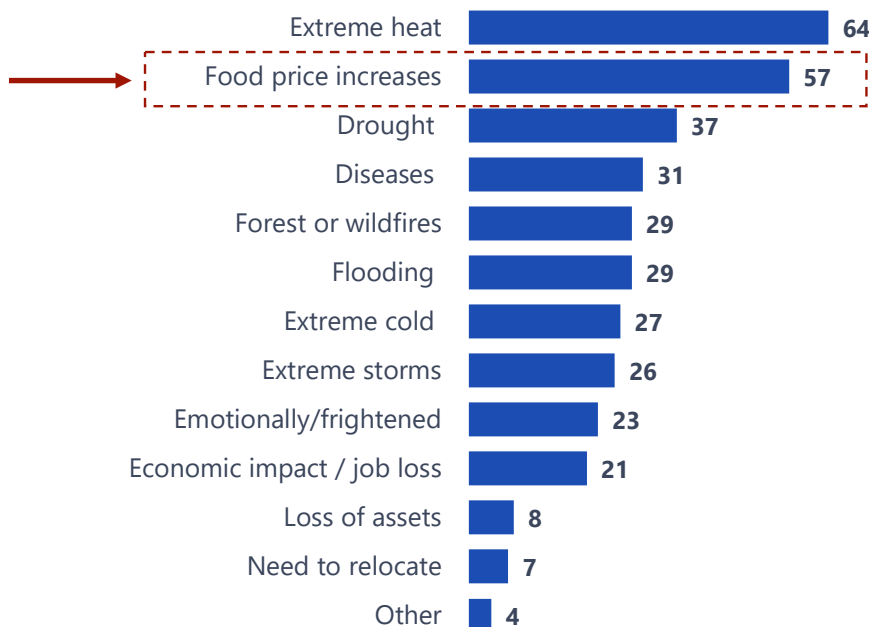
Extent Personally Affected by Climate Change, "Greatly Affected," Average of 26 Countries,* 2020–2022



*For consistent tracking, this chart does not include Colombia, Egypt, Netherlands, Peru, and Portugal, as these countries were not surveyed in 2020.

People have mostly experienced climate change through extreme heat and food price increases

How People Have Been Personally Affected by Climate Change, Average of 31 Countries, 2022

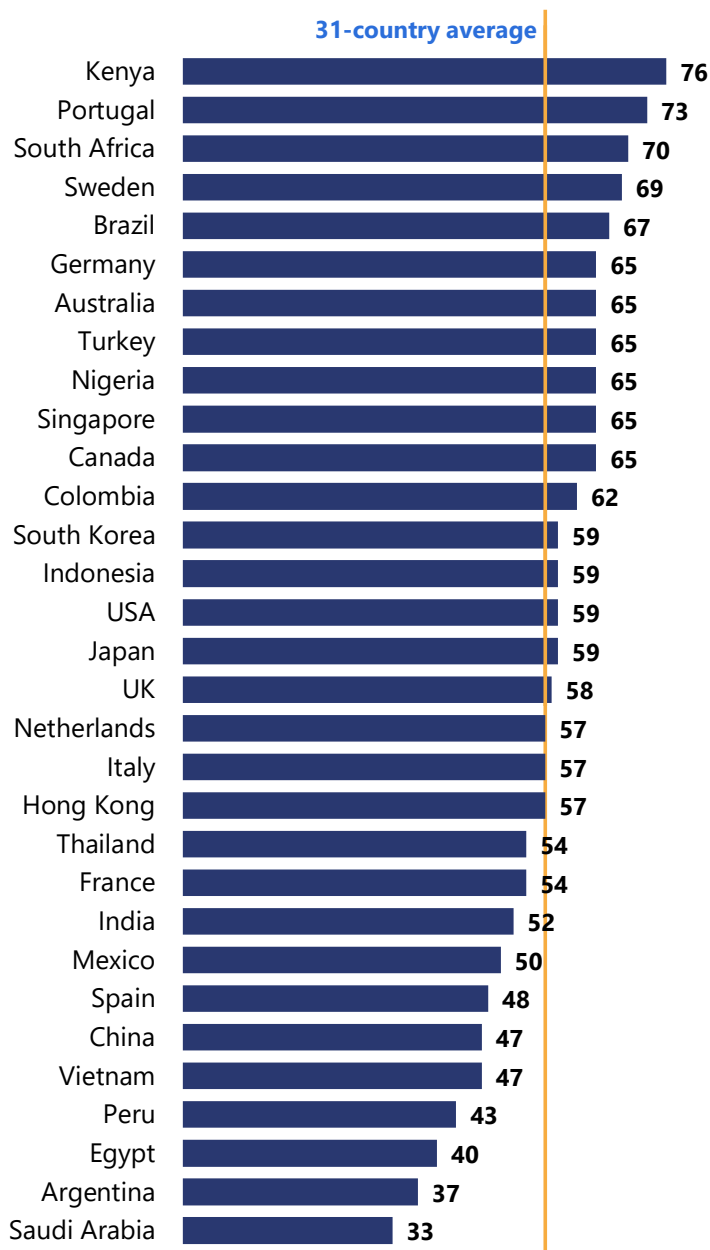


T2. How much are you personally affected by each of the following?

T31. How have you been affected by climate change?

In most countries, majorities of those having personally experienced climate change say this has been through higher prices on food, suggesting people are making a strong connection between the two issues

How People Have Been Personally Affected by Climate Change, "Food Price Increases," by Country, 2022

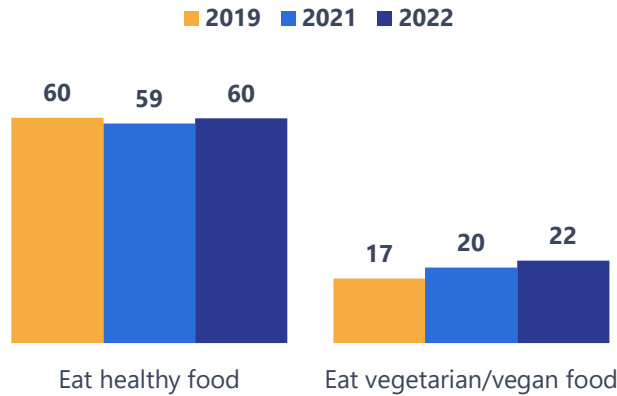


T31. How have you been affected by climate change? Choose all that apply. – Food price increases

Consumer Attitudes and Behaviours

While eating healthy food has remained steady, there is a small but steady increase in eating vegetarian/vegan food over the past three years

Frequency of Environmentally Conscious Food Consumption, "Most" and "All of the Time," Average of 23 Countries,* 2019–2022

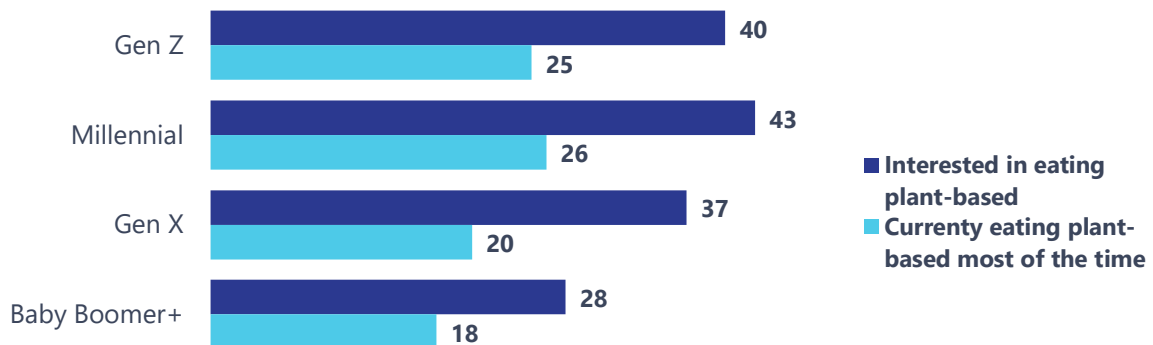


*For consistent tracking, this chart only includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Italy, Indonesia, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, UK, and USA

Q4. Now we would like you to answer a few questions about what you do in your everyday life. Please indicate how often you do each of the following.

Younger generations are more interested in eating plant-based, but there is a large aspiration-action gap

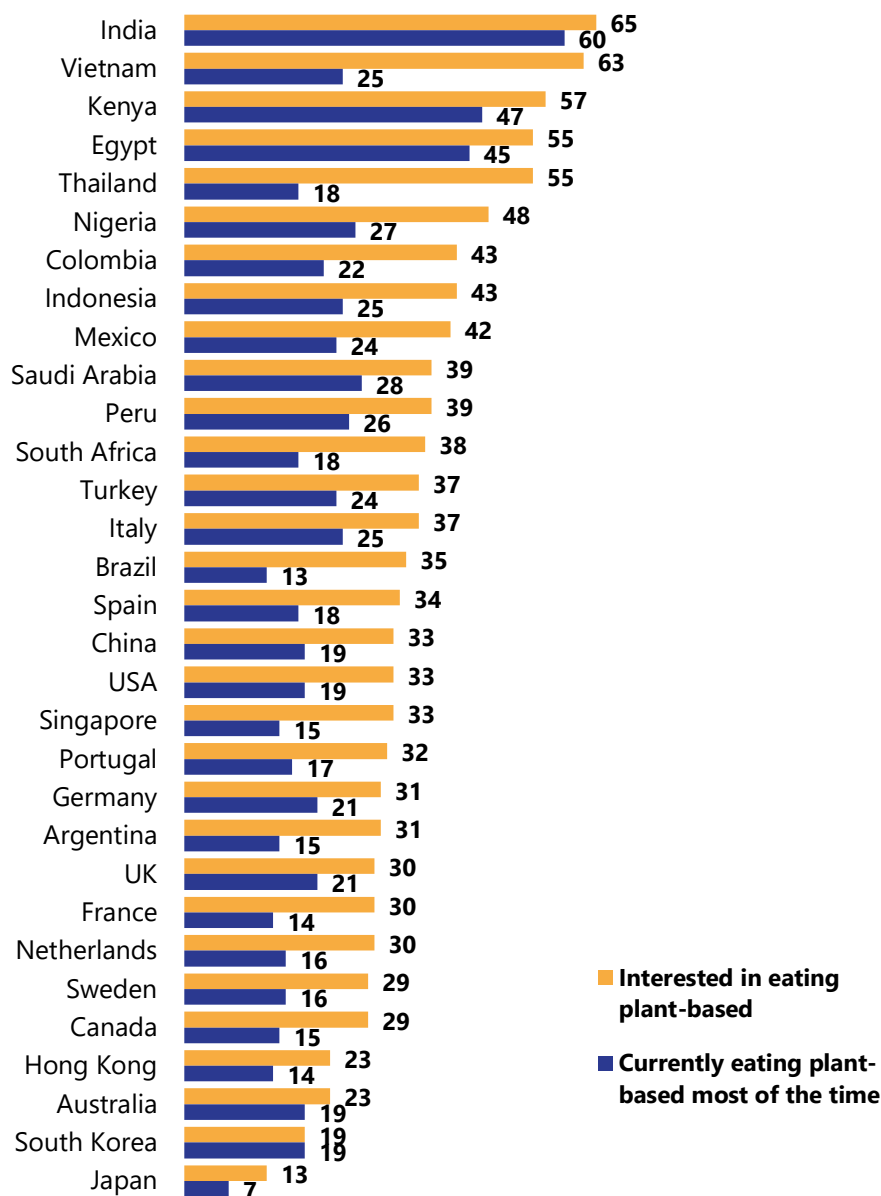
Gap between Plant-based Eating Aspirations and Habits, "Very" and "Extremely Interested" in Eating Plant-based vs Eat Plant-based "Most of the Time," by Generation, 2022



TAR2_1. How interested are you in doing more of each of the following in the coming year? – Eating – Eating plant-based, meat-free foods Q4. Now we would like you to answer a few questions about what you do in your everyday life. Please indicate how often you do each of the following. – I eat vegetarian or vegan food

Aspirations-action gap persists in almost all countries, but largest gaps between interest in plant-based eating and current habits are in Vietnam, Thailand, and Brazil

Gap between Plant-based Eating Aspirations and Habits, "Very" and "Extremely Interested" in Eating Plant-based vs Eat Plant-based "Most of the Time," by Country, 2022

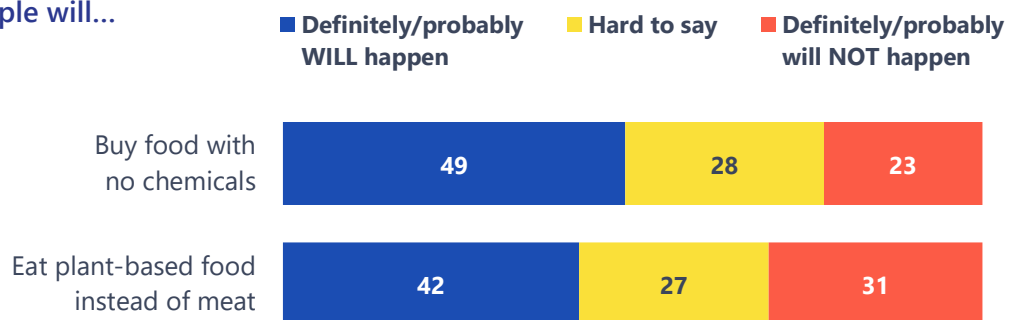


TAR2_1. How interested are you in doing more of each of the following in the coming year? – Eating – Eating plant-based, meat-free foods Q4. Now we would like you to answer a few questions about what you do in your everyday life. Please indicate how often you do each of the following. – I eat vegetarian or vegan food

Almost half of people say we will mostly be eating chemical-free food in next ten years, while four in ten say we will be eating mostly plant-based food instead of meat

Attitudes toward a Sustainable Future, Average of 31 Markets, 2022

In the next ten years,
most people will...



Q40. How likely do you think it is that each of the following will happen in the next ten years?

Food Security

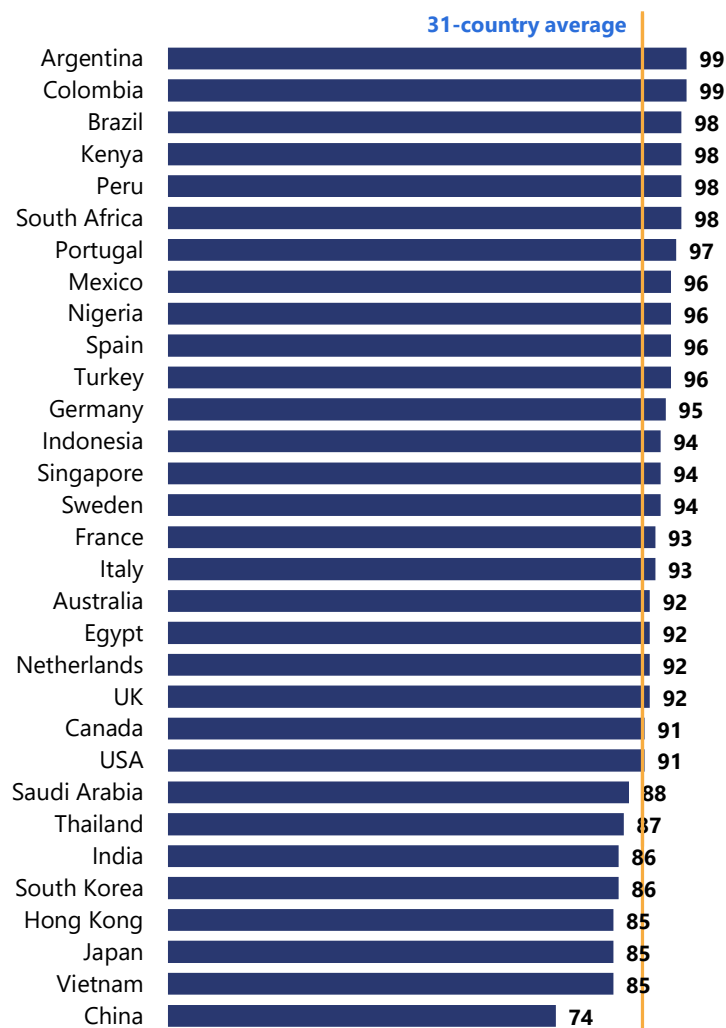
Respondents overwhelmingly report a perceived increase in food prices over the last three months

Food Price Increases over the Last Three Months, Average of 31 Countries, 2022



Perceived increases in food prices are consistent across all countries, with vast majorities reporting an increase over the past three months

Food Price Increases over the Last Three Months, "Yes," by Country, 2022



E6. Has the price of food you buy on a regular basis gone up in the last three months?

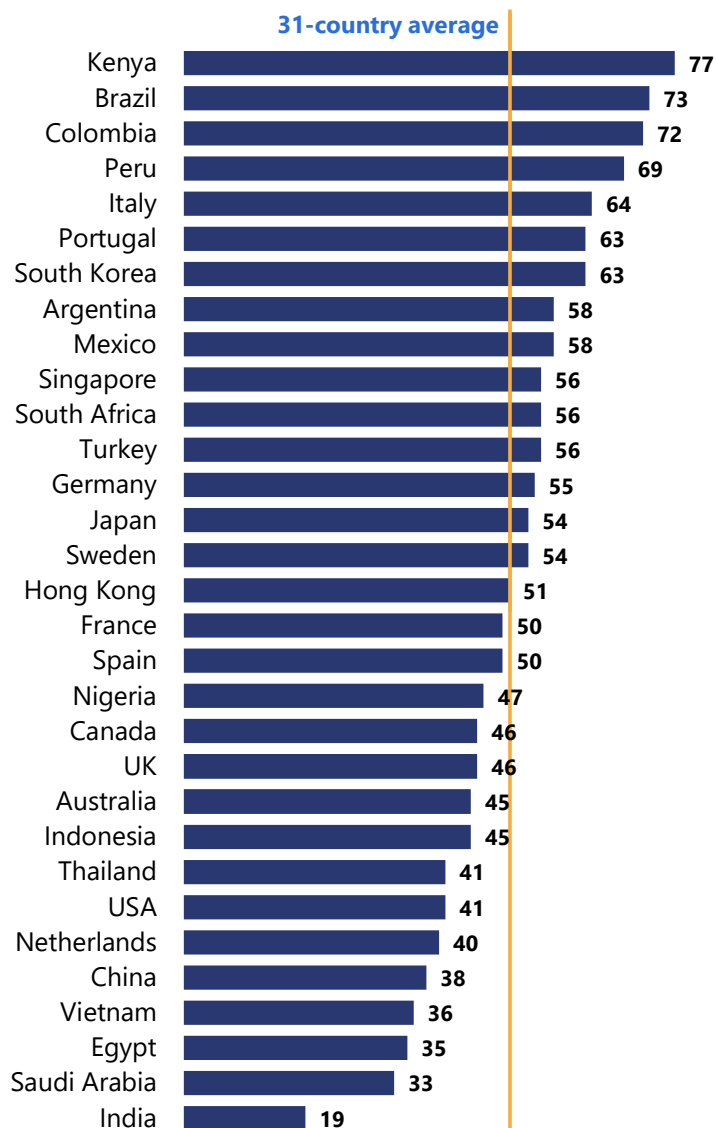
Half of respondents suggest that major world events like COVID-19, climate change, and the war in Ukraine have made them less secure about having access to food

How Major World Events Have Impacted Perceived Food Security, Average of 31 Countries, 2022



Consumers in Latin America report higher levels of food insecurity as a result of recent major world events

How Major World Events Have Impacted Perceived Food Security, "Less Secure," by Country, 2022



E7. Have major world events like the pandemic, climate change, and the war in Ukraine made you more or less secure about having access to food?

Responsible and Healthy Food

The majority of respondents view buying environmentally responsible and healthy food as important

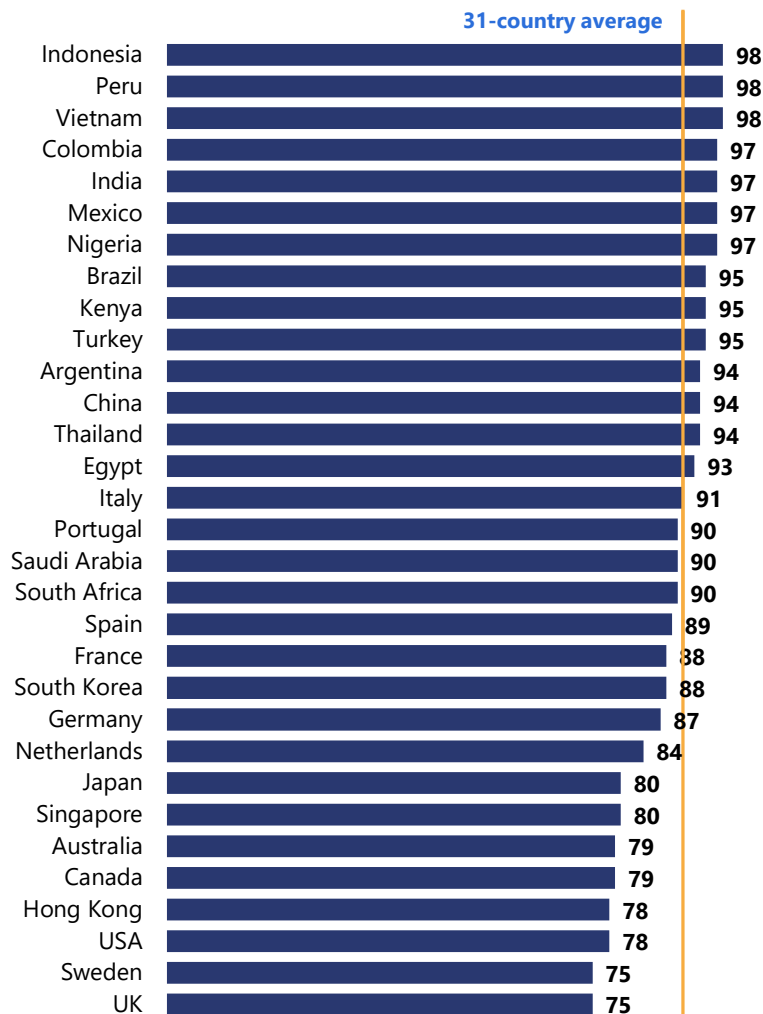
Importance of Buying Environmentally Responsible and Healthy Food, Average of 31 Countries, 2022



E8. How important is buying environmentally responsible and healthy food to you?

Buying environmentally responsible and healthy food is viewed as important across all countries, particularly in the Global South

Importance of Buying Environmentally Responsible and Healthy Food, "Important" (1+2), by Country, 2022



E8. How important is buying environmentally responsible and healthy food to you?

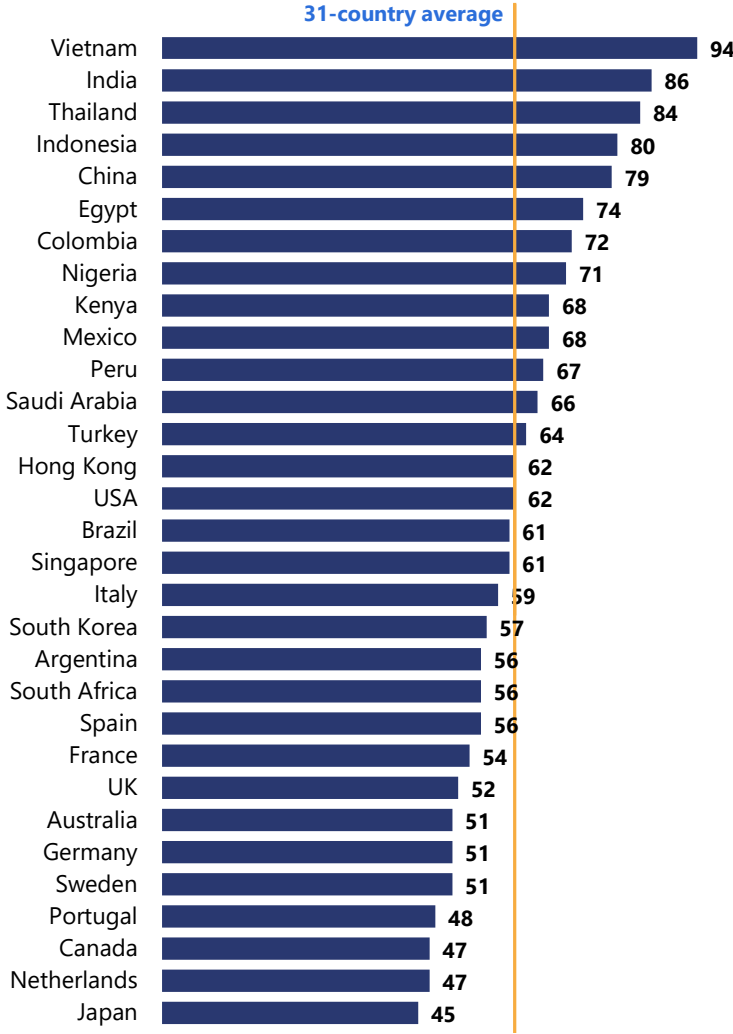
Almost two-thirds of respondents are willing to pay a more than regular price for healthy and environmentally responsible food

Willingness to Pay More for Healthy and Environmentally Responsible Food, Average of 31 Countries, 2022



Willingness to pay more for healthy and environmentally responsible food varies significantly by country

Willingness to Pay More for Healthy and Environmentally Responsible Food, "Yes," by Country, 2022



E9. Given the current economic circumstances, would you be willing to pay a more than regular price for healthy and environmentally responsible food?

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EAT is a global non-profit founded by the Stordalen Foundation, Stockholm Resilience Centre and the Wellcome Trust to catalyze a food system transformation. EAT works to achieve a vision of a fair and sustainable global food system for healthy people and planet – leaving no one behind, to be achieved through sound science, impatient disruption, and novel partnerships. To ensure success, EAT connects and partners with members of the science, policy, and business communities following a framework for change centered on a dynamic three-way interaction across knowledge, engagement and action.

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