



Grains of Truth

EAT-GlobeScan
Global Consumer
Research on Healthy and
Sustainable Food Systems



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Research Methodology

- Representative online samples of approximately 1,000 adults in each of 31 Markets (500 each in Hong Kong and Singapore) ($n=30,352$)
- Samples representative of online population, weighted to reflect general population census data
- Online surveying in June and July 2021



Introduction

EAT and GlobeScan wanted to conduct some significant research in advance of the United Nations Food Systems Summit (UNFSS). The two organizations collaborated on developing questions to the public in 31 markets around the world about their definitions of good, healthy, and sustainable food, their concerns about the current food system, and who should drive the changes needed to improve it.

Respondents were asked about how easy or difficult it is for them to cook healthy food, prepare plant-based meals, avoid food waste, or buy food that is sustainably produced.

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 Meaning of “Healthy,” “Good,” and “Sustainable” Food

While all three concepts have broad associations, “Sustainable food” is most strongly associated with environmental benefits, whereas “healthy food” has strong associations with nutritional value. “Good food” is more of a mixture of the two, with both environmental and nutritional benefits.

- In most markets, “sustainable food” is primarily regarded as being good for the environment and being organic. UK, Brazil, Japan, Singapore, and Germany are the markets where the largest portion of consumers describe sustainable food as being good for the environment. In Vietnam, Portugal, and Argentina, the main meaning of sustainable food is being organic, with more than half of consumers describing it this way. Being locally grown also plays a major role in the definition of sustainable food, particularly in EU countries such as Germany where it receives the top ranking.
- Gen Z and Millennials are more likely than others to describe “sustainable food” as being nutritious, while Gen X and Baby Boomers are more likely than younger people to associate it with being locally grown and unprocessed.
- This differs from the meaning of “healthy food” which is primarily associated with the attributes “nutritious,” “organic,” and “unprocessed/whole.”

The Take-away: Consumers view the sustainability of food from several perspectives. These can be seen as (i) the positive effects on the environment, (ii) nutrition, and (iii) a “health-related” view (e.g., organic, which implies the lack of pesticides). However, it is interesting that these also show up in associations with both “good food” and “healthy food.” It is therefore important for food producers to incorporate these complementary perspectives in their communications and in crafting their sustainability strategies.

Concerns about the Food System

Consumers have strong concerns around how food is produced across several aspects, with the use of pesticides and single-use plastic waste being rated as most concerning

- Among the many aspects of the food system (i.e., how food is produced, processed, shipped, stored, sold to consumers, and disposed of), consumers are most concerned about the use of pesticides and single-use plastic waste.
- One significant concern of consumers in all countries surveyed is the use of chemical pesticides in agriculture. This topic will present a challenge for food producers who must communicate when and how pesticides are needed in a manner which is understood and acceptable to consumers. Transparency throughout the food production system will be expected by consumers.
- Single-use plastic waste from food packaging is a major concern for a vast majority of consumers in many markets. However, concern is slightly lower in China, USA, Hong Kong, and Saudi Arabia.
- In Latin America, concern about the impact of food production on human exposure to diseases spread by animals is higher than in other regions.
- Baby Boomers and Gen X consumers are more concerned than Gen Z and Millennial consumers about several issues in the food system, especially chemical pesticides in agriculture, obesity and diet-related health issues, single-use plastics, overfishing, and GM foods.

The Take-away: High levels of concern about several issues in the food system require those involved across the system to increase transparency about how food is produced and why certain interventions are needed to ensure consumer trust. Moreover, action is needed on the high-profile and tangible issue of single-use plastic waste from food packaging to help consumers balance their nutrition and health needs with the desire to be more environmentally sustainable.

Executive Summary Cont'd

Actors That Can Most Influence Positive Change

Consumers believe strong leadership from governments and companies is critical in driving change toward a more healthy and sustainable food system

- Nearly half of consumers believe that national governments can have the most influence in leading positive change to create a more sustainable food system, while one-third also think that food and beverage companies can be the most influential. In most countries, these actors are cited as the two main influencers of positive change.
- Consumers in China and Singapore are most likely to say national governments can most influence positive change, while food and beverage companies are mentioned most in Russia, Indonesia, and Japan.
- Older generations are more likely than others to say that governments are most influential, while younger people are more likely than others to point to celebrities/influencers and other young people.

The Take-away: People have high expectations of their national governments to lead and drive positive changes in the food system. But it will fall on companies within the food system to then implement the prescribed changes, whether regulatory or otherwise. However, these are not the only actors with a role and influence as our research shows. Governments and companies must come together with other actors (e.g., farmers, NGOs, and citizens) to work together in designing and delivering processes and interventions that enable a more sustainable food system.

Consumer Actions and Barriers

Buying healthy and sustainable food is seen as difficult by almost one-quarter of consumers, but three-quarters say it is easy to cook a healthy meal for family at home. Affordability is the most significant barrier to buying more healthy and sustainable food.

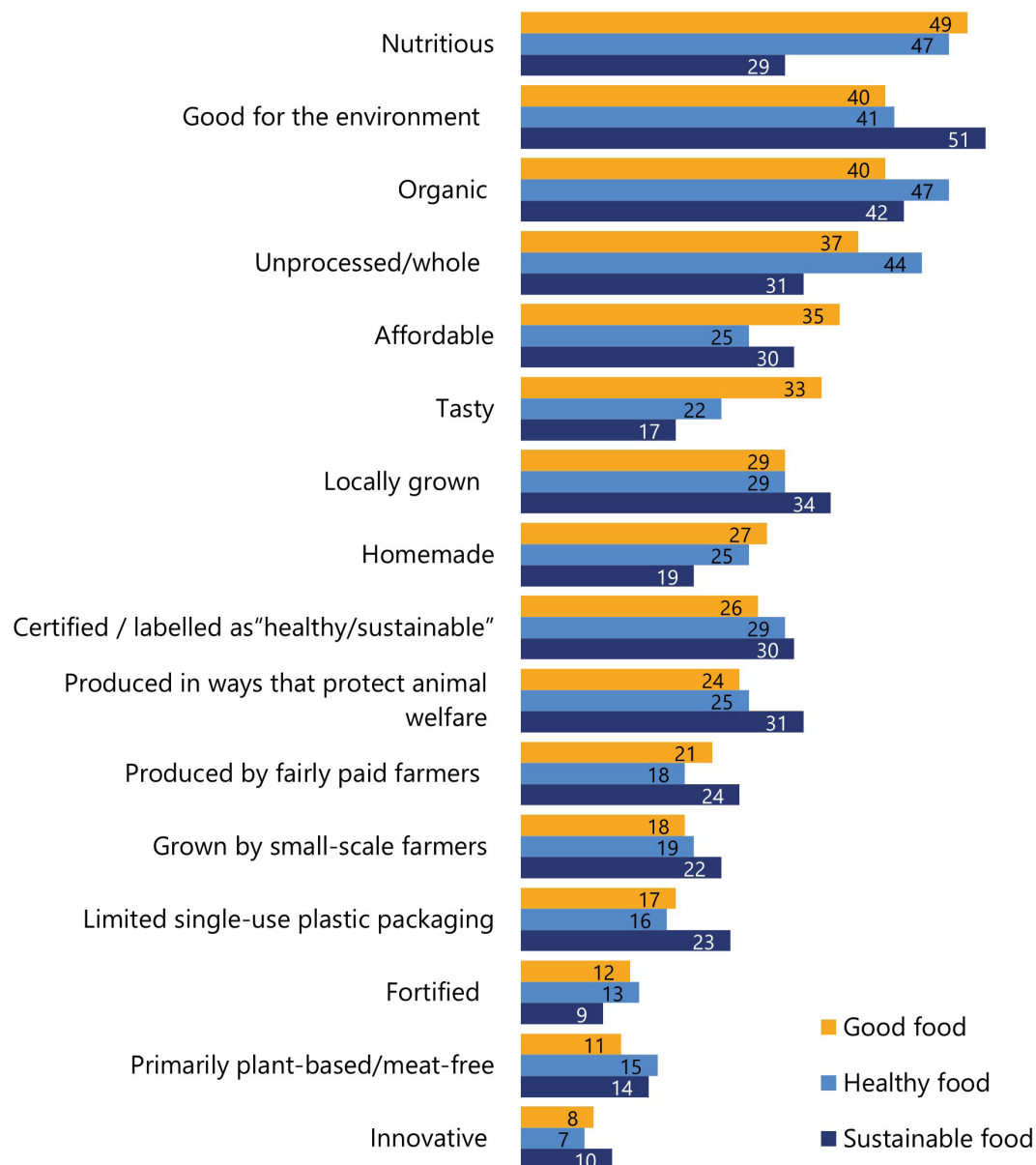
- Cooking a healthy meal and minimizing food waste are regarded as relatively easy by most consumers, but opinion is more divided on cooking a vegetarian meal or buying sustainably produced food.
- In some markets in South Asia, such as Thailand, Vietnam, India, and Indonesia, buying sustainably produced food is deemed relatively easy, but in some of the wealthiest markets in Asia (South Korea, Hong Kong, and Japan), fewer than half of consumers say that buying healthy food that is sustainably produced is easy.
- Older people are more likely to state that it is easy to cook a healthy meal and to avoid food waste, while Millennials are most likely to find cooking plant-based meals and buying healthy and sustainable food to be easy.
- Affordability of sustainable food is seen as the most prominent barrier for consumers who say it is difficult for them to buy sustainable food. Availability of sustainable food is the second-most cited barrier by consumers overall, particularly in Latin America.

The Take-away: The scientific necessity of developing a healthier and more sustainable food system is matched by consumers' concerns and desires for their food to be more sustainable. However, progress could be arrested if consumers' access to healthier and more sustainable food is blocked by an affordability barrier. Where large numbers of people in some of the richest countries in the world state that affordability is a barrier to buying more sustainable food, this highlights a critical issue. Not only do governments, companies, and other actors need to collaborate on making food more sustainable, their interventions need to address how more sustainable food can be made affordable to the many and not just the few.

Meaning of "Good," "Healthy," and "Sustainable" Food

"Sustainable food" is primarily described as being good for the environment and organic; "healthy food" and "good food" are primarily described as being nutritious

Meaning of "Good Food" / "Healthy Food" / "Sustainable Food," Average of 31 Markets, 2021

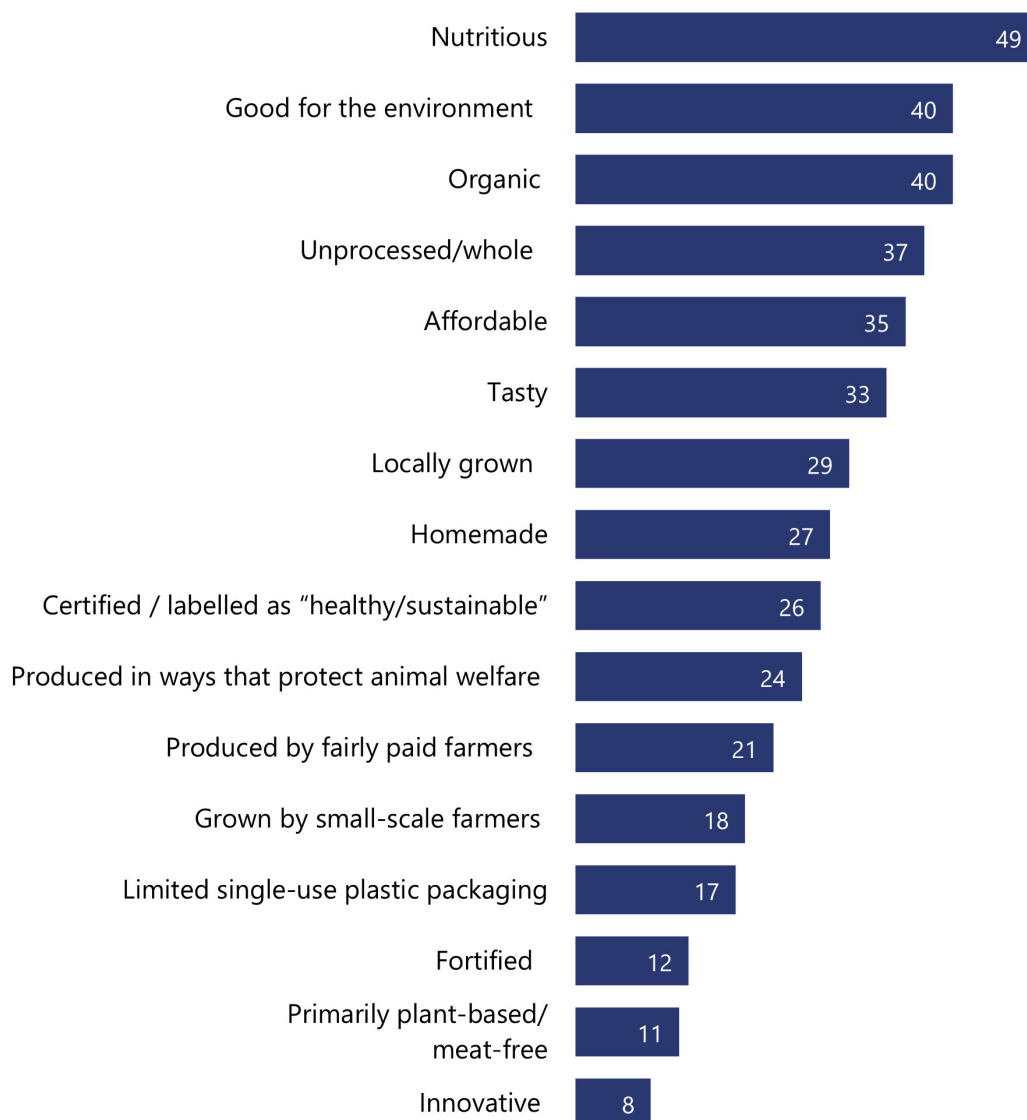


E1a/b/c Which of the following best describes the meaning of "good food" / "healthy food" / "sustainable food" for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

“Good food” is primarily described as being nutritious, good for the environment, organic, unprocessed, and affordable

Meaning of “Good Food,” Average of 31 Markets, 2021

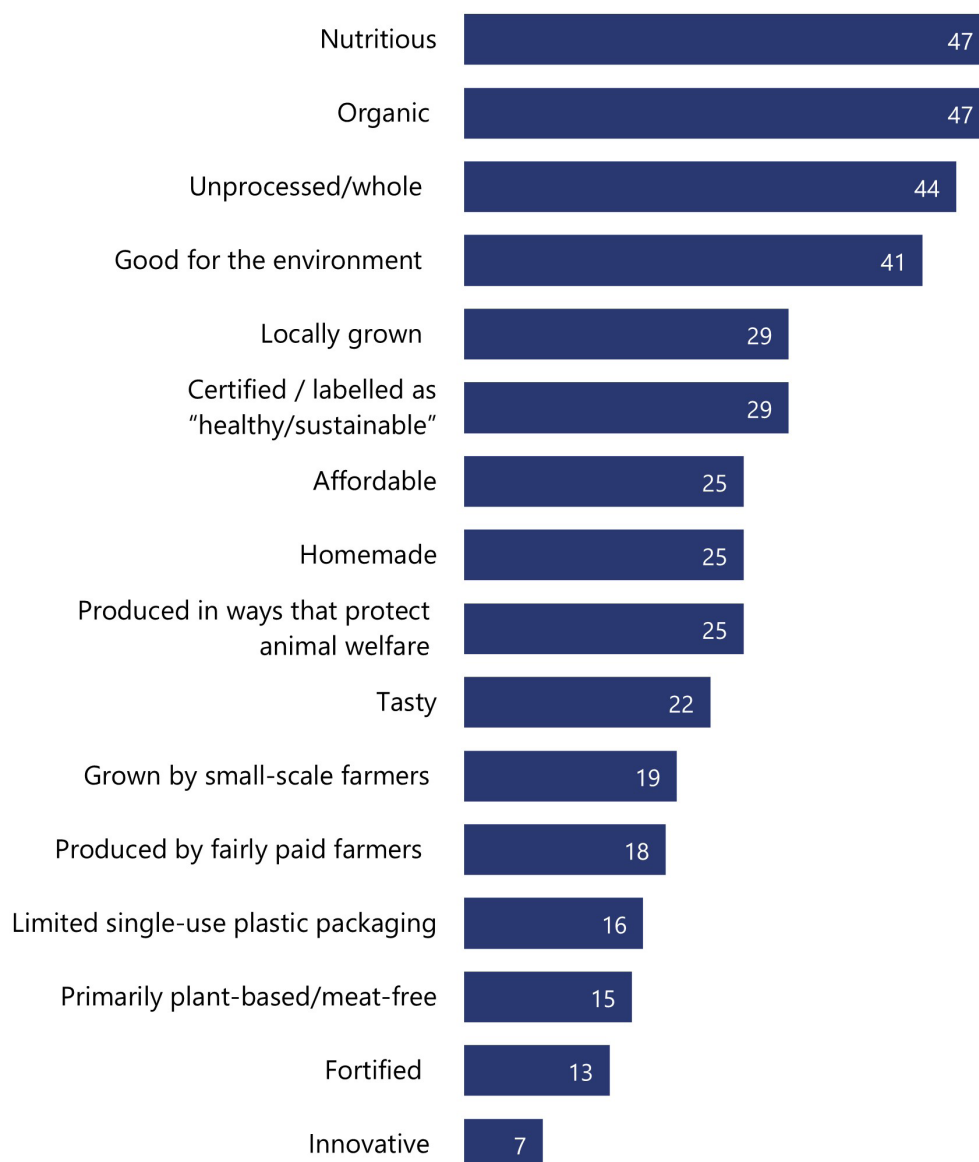


E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

“Healthy food” is primarily described as being nutritious, organic, unprocessed, and good for the environment

Meaning of “Healthy Food,” Average of 31 Markets, 2021

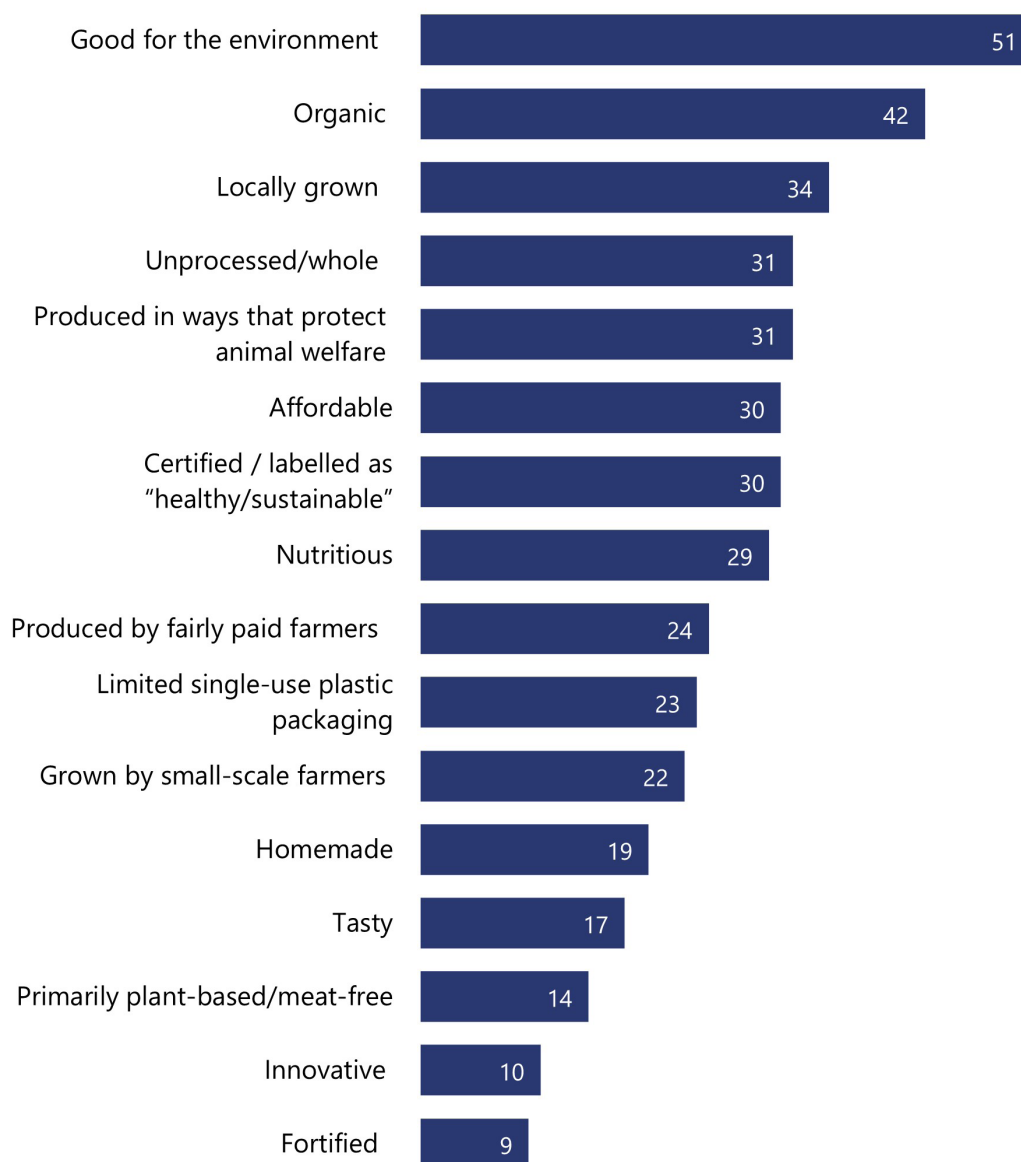


E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

“Sustainable food” is primarily described as being good for the environment, organic, and locally grown

Meaning of “Sustainable Food,” Average of 31 Markets, 2021

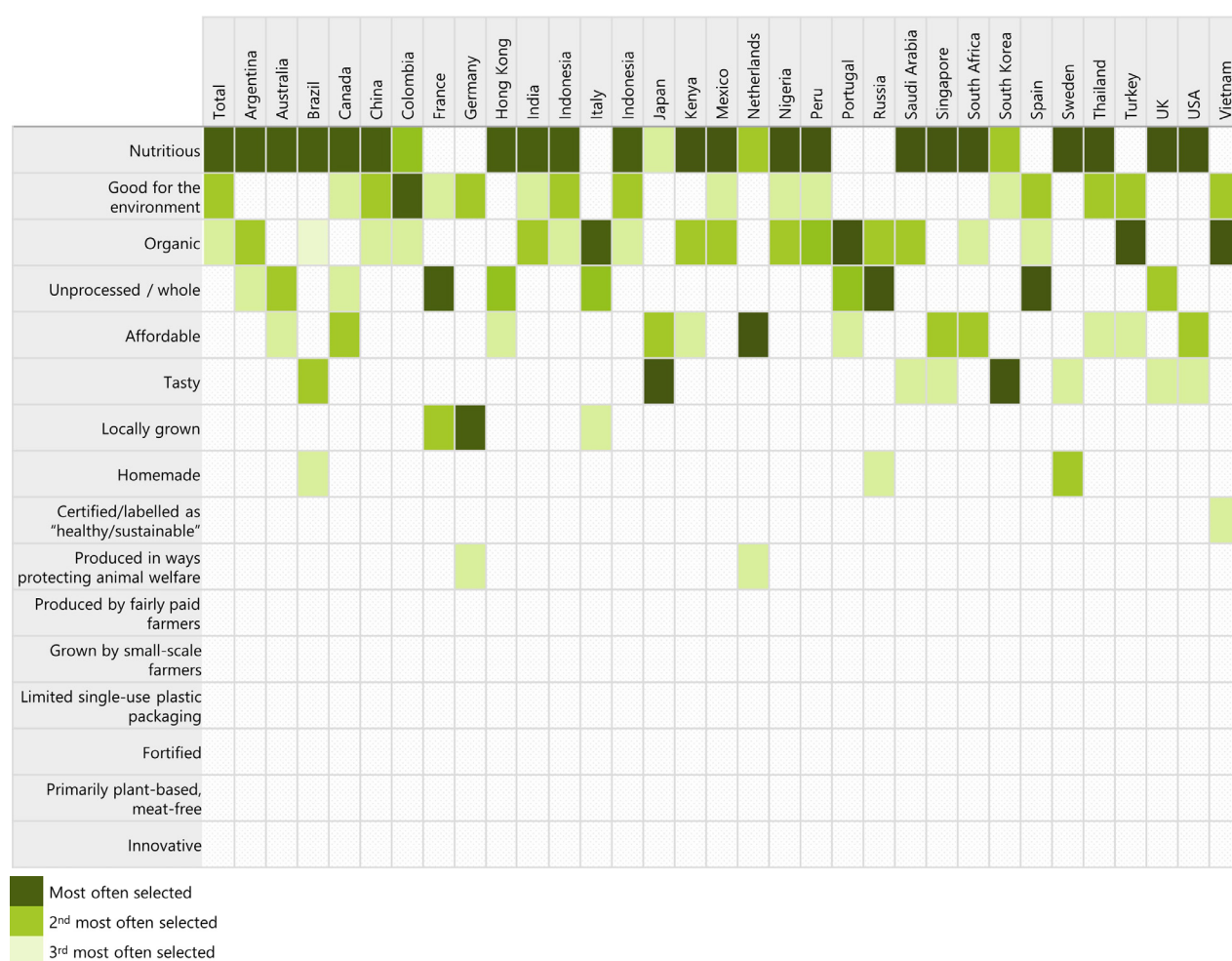


E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

While “good food” is primarily described as being nutritious in most countries, other top associations vary by country; European consumers also associate “good food” with being locally grown and unprocessed

Meaning of “Good Food,” by Market, 2021

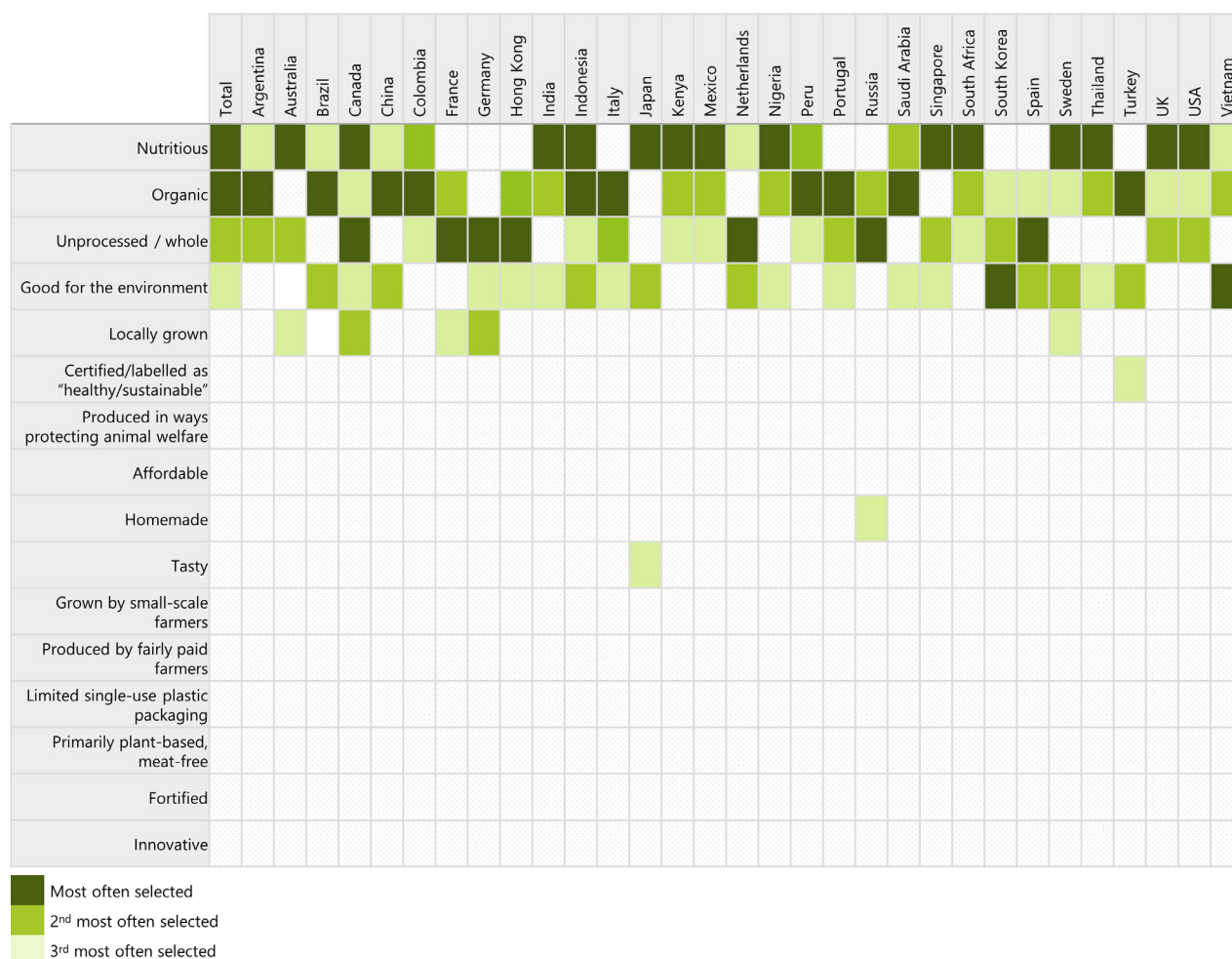


E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

“Healthy food” is primarily described as being nutritious and organic in a majority of countries

Meaning of “Healthy Food,” by Market, 2021

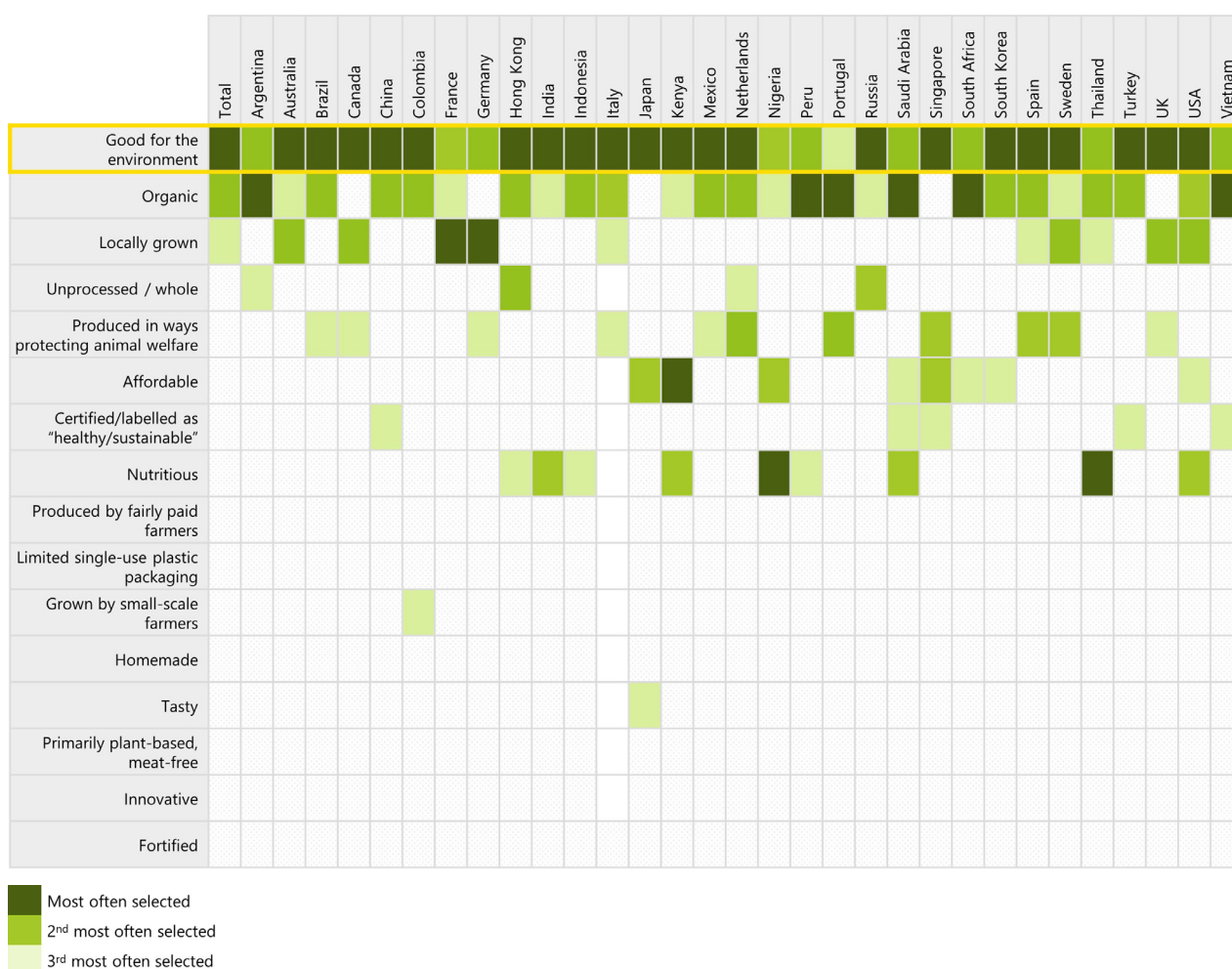


E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

In all countries, being good for the environment is a top-three description of “sustainable food”; organic, locally grown, and animal welfare are also highly associated with sustainable food

Meaning of "Sustainable Food," by Market, 2021

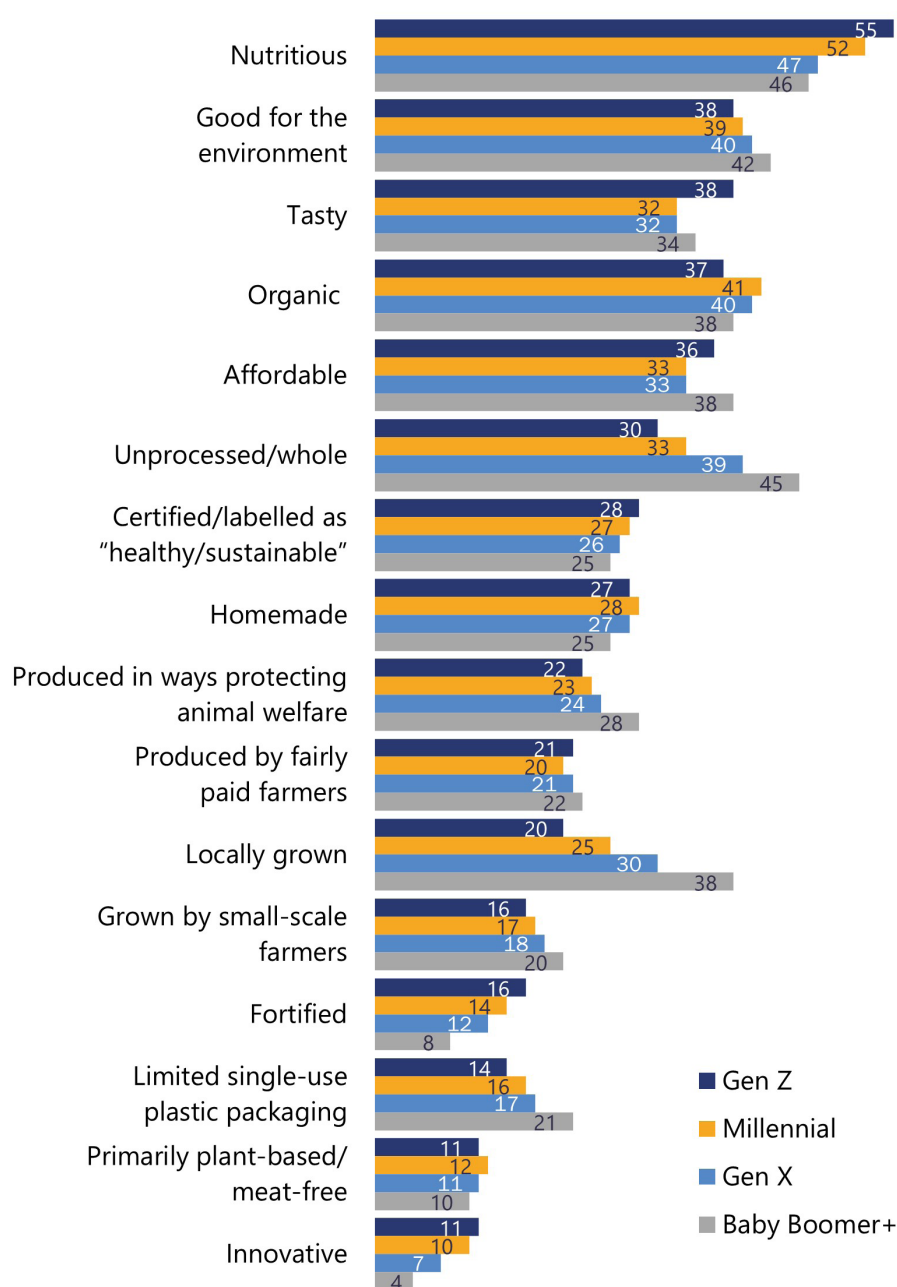


E1a/b/c Which of the following best describes the meaning of "good food" / "healthy food" / "sustainable food" for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

“Good food” is more likely to be described as nutritious by younger generations (Gen Z and Millennials) while older generations (Gen X and Baby Boomers) associate it with being unprocessed/whole and locally grown

Meaning of “Good Food,” Average of 31 Markets, by Generation, 2021

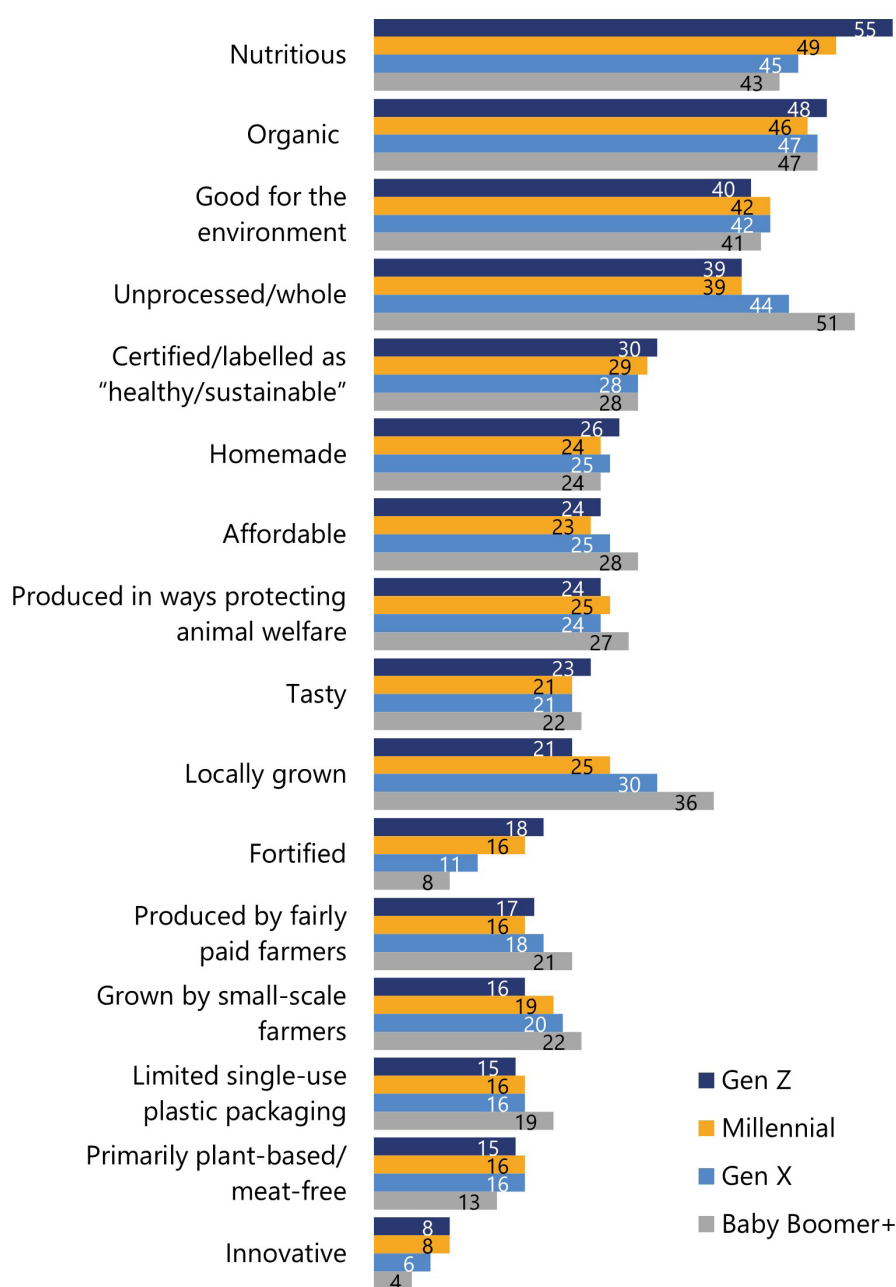


E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

The meaning of “healthy food” differs by generation; it is primarily described as being nutritious and tasty by Gen Z consumers, while Baby Boomers associate it more with being unprocessed and locally grown

Meaning of “Healthy Food,” Average of 31 Markets, by Generation, 2021

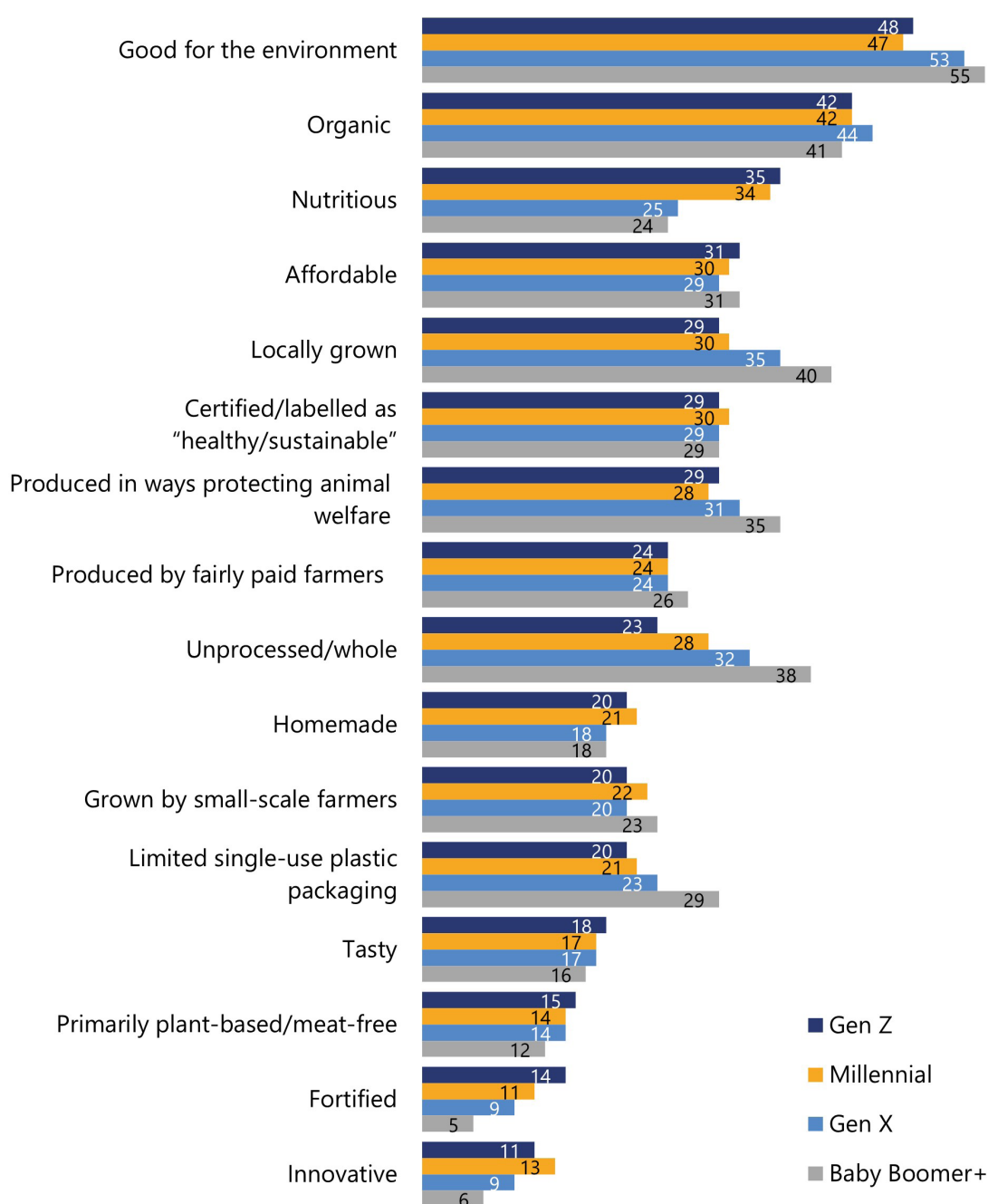


E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items.

Meaning of “Good,” “Healthy,” and “Sustainable” Food

“Sustainable food” has a fairly consistent meaning across generations, but Gen Z and Millennials are more likely to describe it as being nutritious than Gen X and Baby Boomers

Concern about Meaning of “Sustainable Food,” Average of 31 Markets, by Generation, 2021



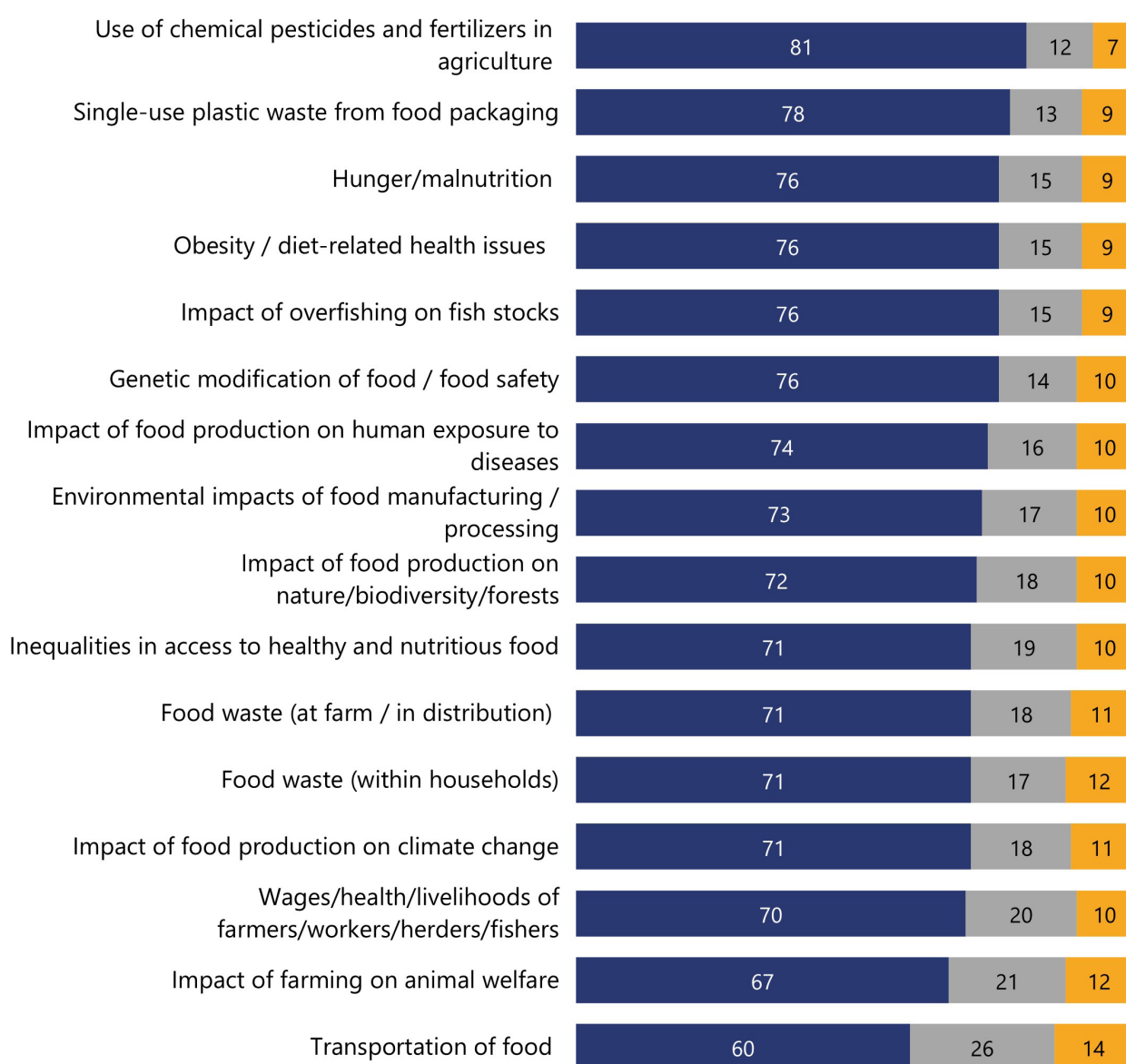
E1a/b/c Which of the following best describes the meaning of “good food” / “healthy food” / “sustainable food” for you? Please choose up to five items

Concerns about the Food System

Consumers are most concerned about the use of pesticides and single-use plastic waste in the food system; they are somewhat less concerned about the transportation of food

Concern about Food System, Average of 31 Markets, 2021

■ Very / somewhat concerned ■ Neither concerned nor not concerned ■ Not very / not at all concerned

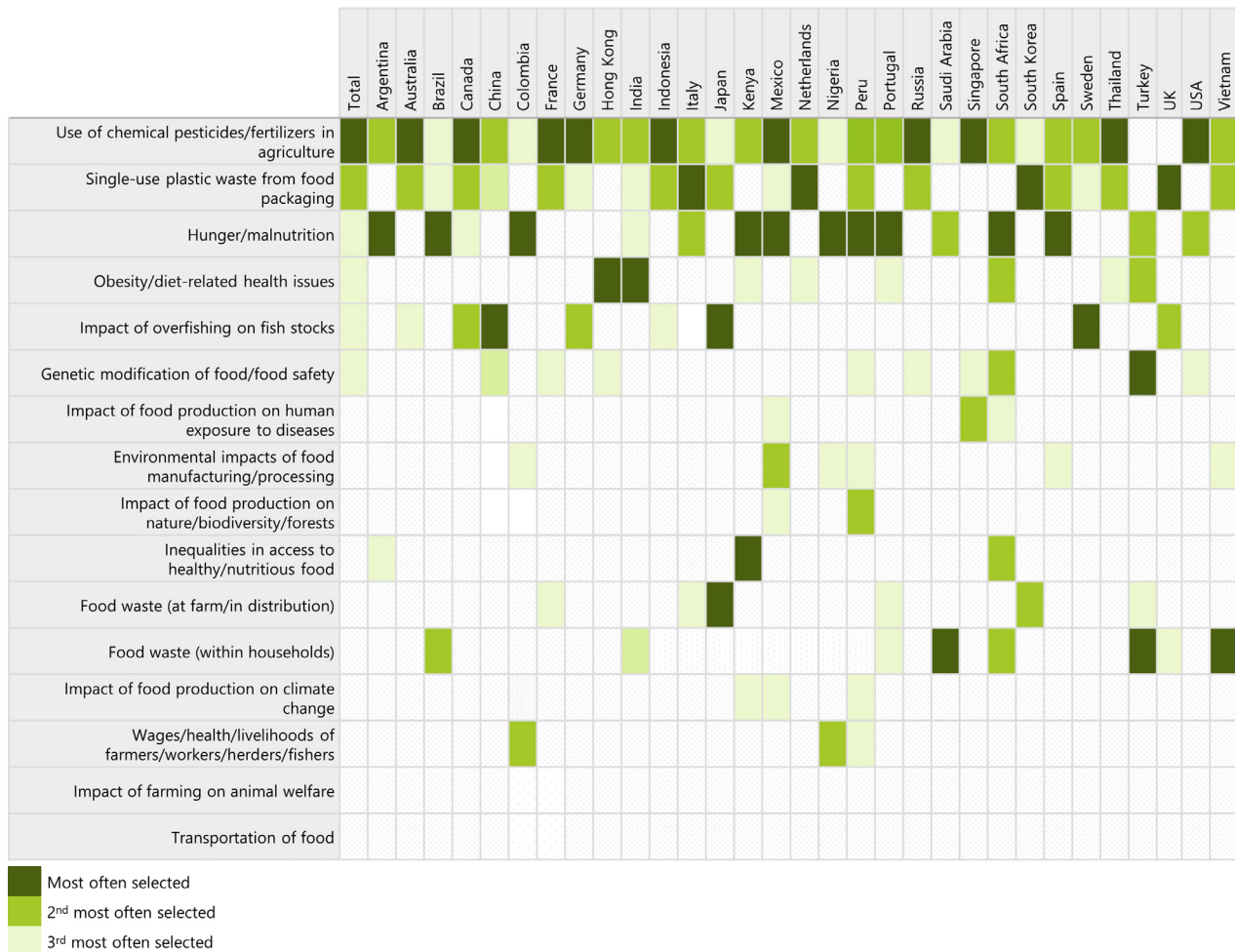


E2. There are many aspects to how food is produced at the farm, processed, shipped, stored, and then sold to consumers and disposed of. Please rate how concerned you are about each of the different parts of this food system.

Concerns about the food system

Besides the use of pesticides and single-use plastic waste, other major concerns vary by country; hunger stands out as a key concern in Latin America and Africa

Concern about Food System, "Somewhat" and "Very Concerned," by Market, 2021

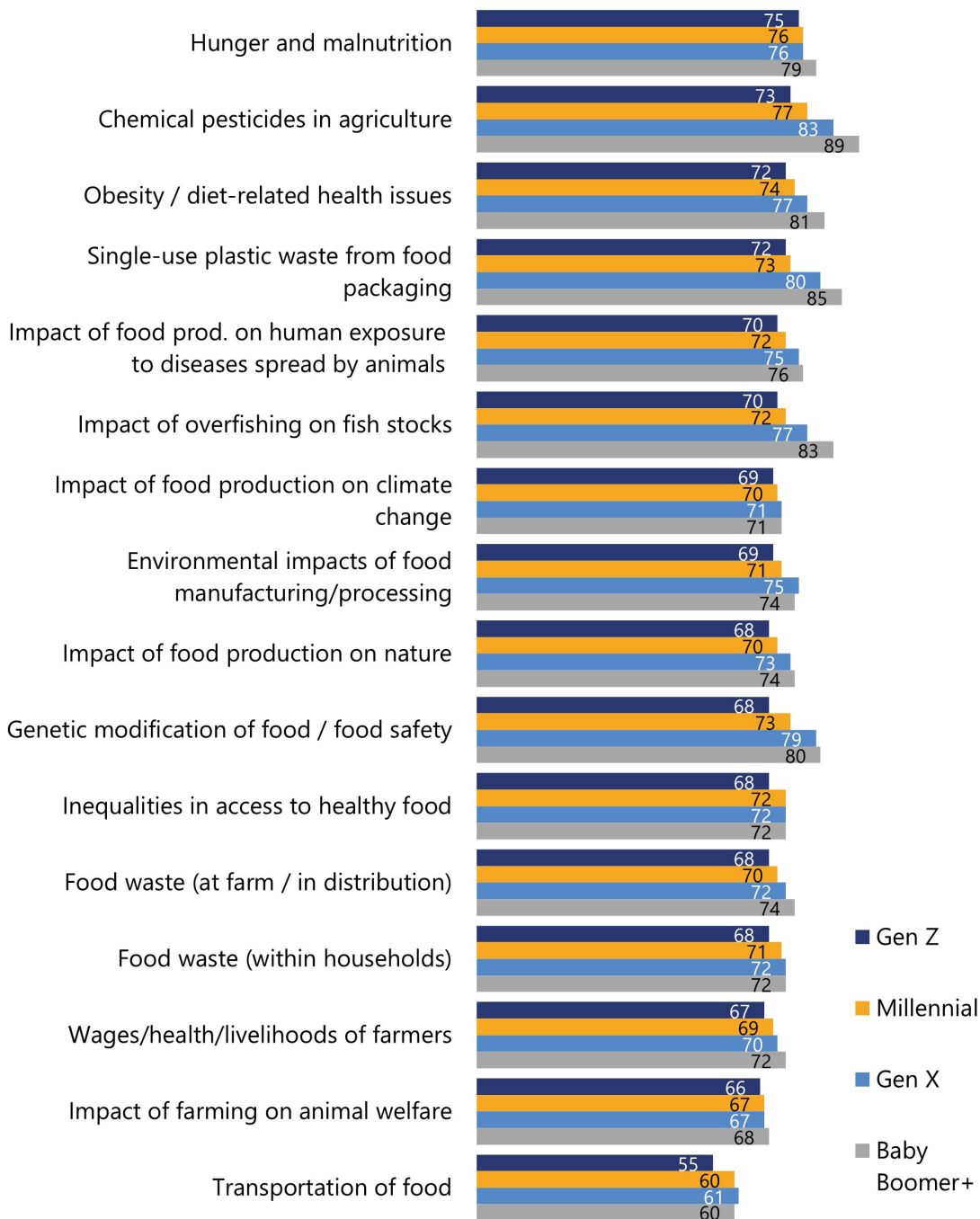


E2. There are many aspects to how food is produced at the farm, processed, shipped, stored, and then sold to consumers and disposed of. Please rate how concerned you are about each of the different parts of this food system.

Concerns about the food system

Older consumers tend to be more concerned about several food issues compared to younger people

Concern about Food System, "Somewhat" and "Very Concerned," Average of 31 Markets, by Generation, 2021



E2. There are many aspects to how food is produced at the farm, processed, shipped, stored, and then sold to consumers and disposed of. Please rate how concerned you are about each of the different parts of this food system.

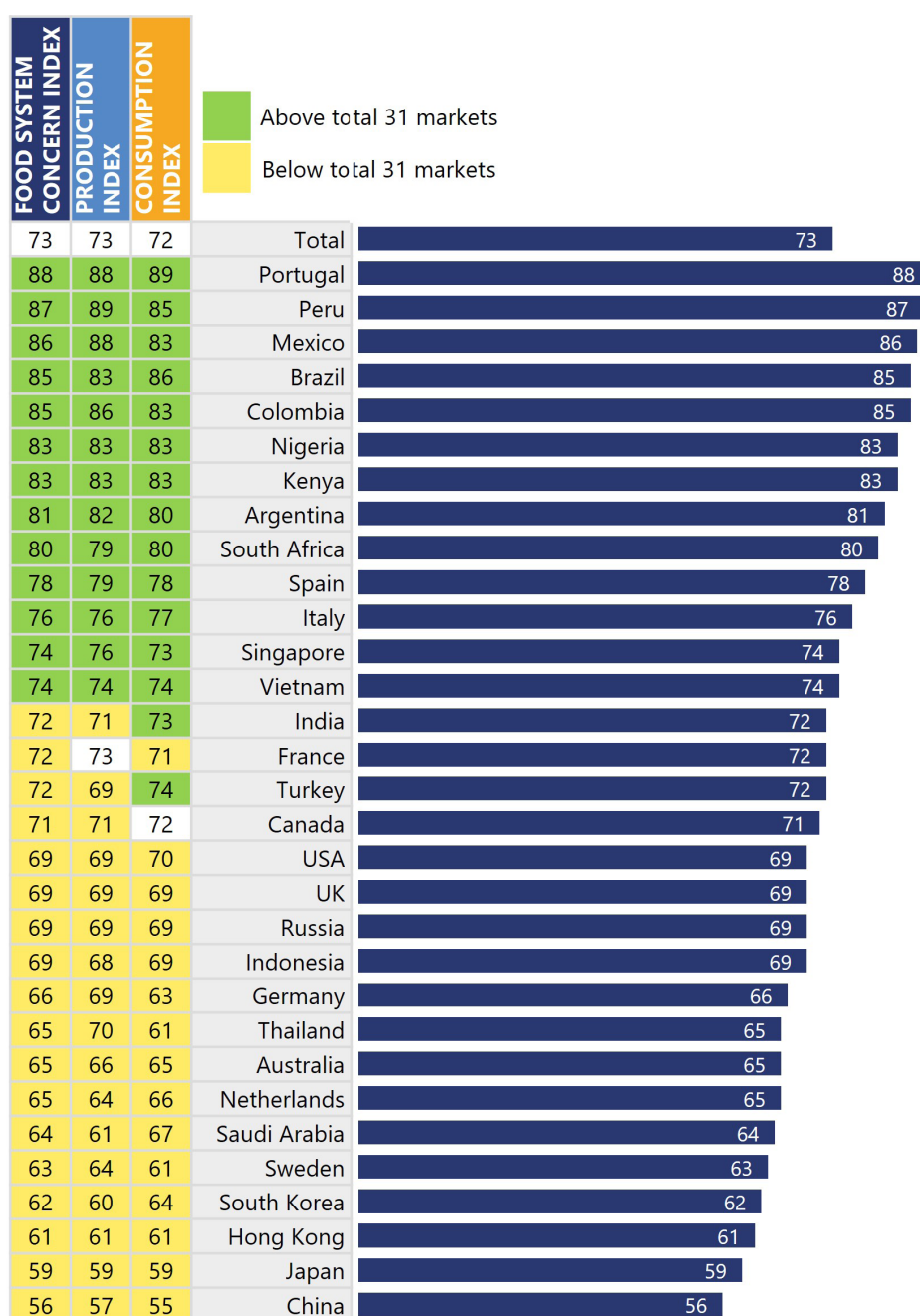
Food System Concern Index – Definition

- The Food System Concern Index can be considered as a “Concern Barometer.”
- It is an aggregate of several ratings enabling quick comparison across countries or other sub-groups.
- It was developed by averaging the percentage of respondents who say they are “very” or “somewhat concerned” for all 16 attributes rated in question E2.
- It is composed of two sub-indexes (please refer to the table on the right for the list of attributes within each Index):
 - Production Index
 - Consumption Index

PRODUCTION	The impact of food production (including agricultural) on nature/biodiversity/forests
	The impact of food production (including agricultural) on climate change
	The impact of food production (including agricultural) on human exposure to diseases spread by animals (e.g., Ebola, HIV, coronavirus)
	The use of chemical pesticides and fertilizers in agriculture
	The impact of overfishing on fish stocks
	The wages, health, and livelihoods of farmers/farm workers, herders, and people who fish
	The impact of farming on animal welfare
	The environmental impacts of food manufacturing and processing
CONSUMPTION	The transportation of food
	The genetic modification of food and food safety
	Hunger and malnutrition
	Obesity and diet-related health issues like diabetes
	Inequalities in access to healthy and nutritious food
	Food waste (at farm and in distribution)
	Food waste (within households)
	Single-use plastic waste from food packaging

Consumers in Latin America, Africa, and Southern Europe express strongest concerns about the food system

Food System Concern Index (Average of % "Very" + "Somewhat concerned" for the 16 attributes), by Market, 2021

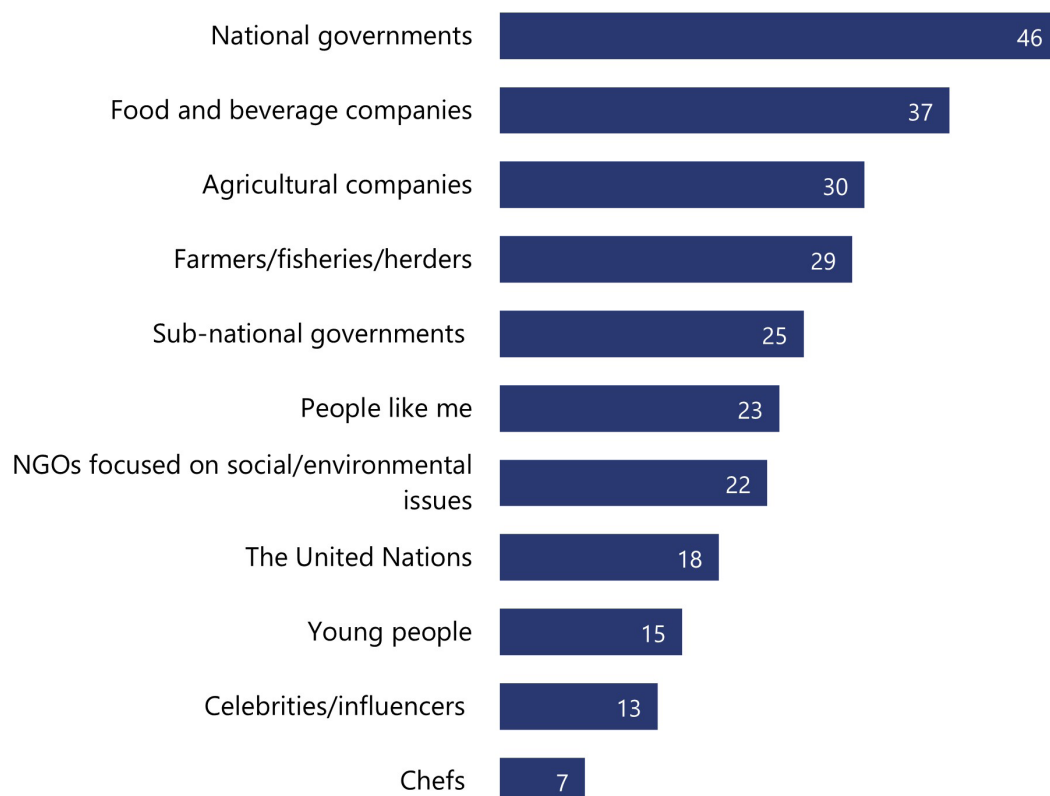


E2. There are many aspects to how food is produced at the farm, processed, shipped, stored, and then sold to consumers and disposed of. Please rate how concerned you are about each of the different parts of this food system.

Actors That Can Most Influence Positive Change

Nearly half of consumers believe that national governments can most influence positive change in creating a more healthy and sustainable food system; over a third also say that food and beverage companies can do so

Actors That Can Most Influence Positive Change, Average of 31 Markets, 2021 eaning of "Good Food" / "Healthy Food" / "Sustainable Food," Average of 31 Markets, 2021

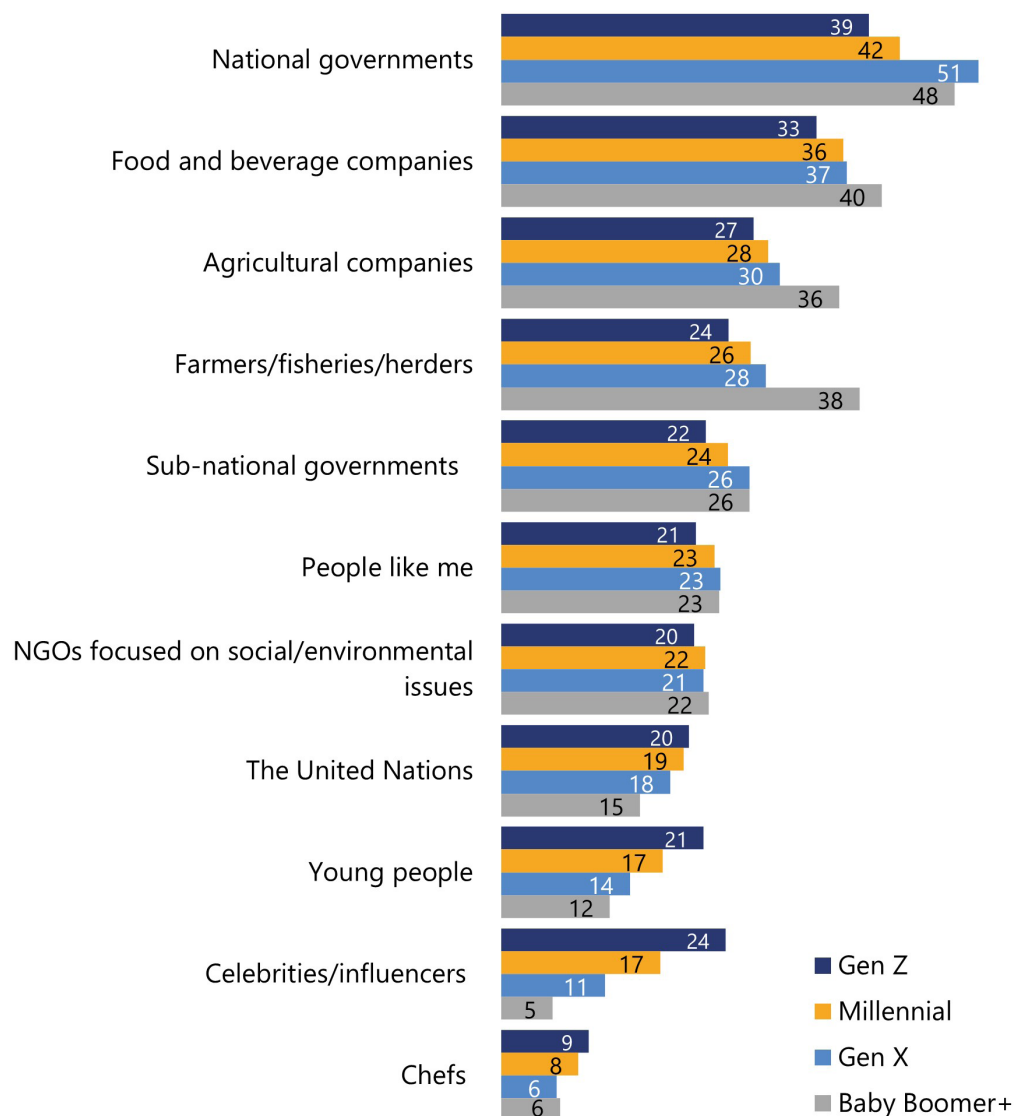


E3. Which of the following actors can most influence positive change in creating a more healthy and sustainable food system? Choose up to three.

Actors that can most influence positive change

Older generations are more likely than others to say that governments are most influential, while younger people are more likely than others to point to celebrities/influencers and other young people

Actors That Can Most Influence Positive Change, Average of 31 Markets, 2021

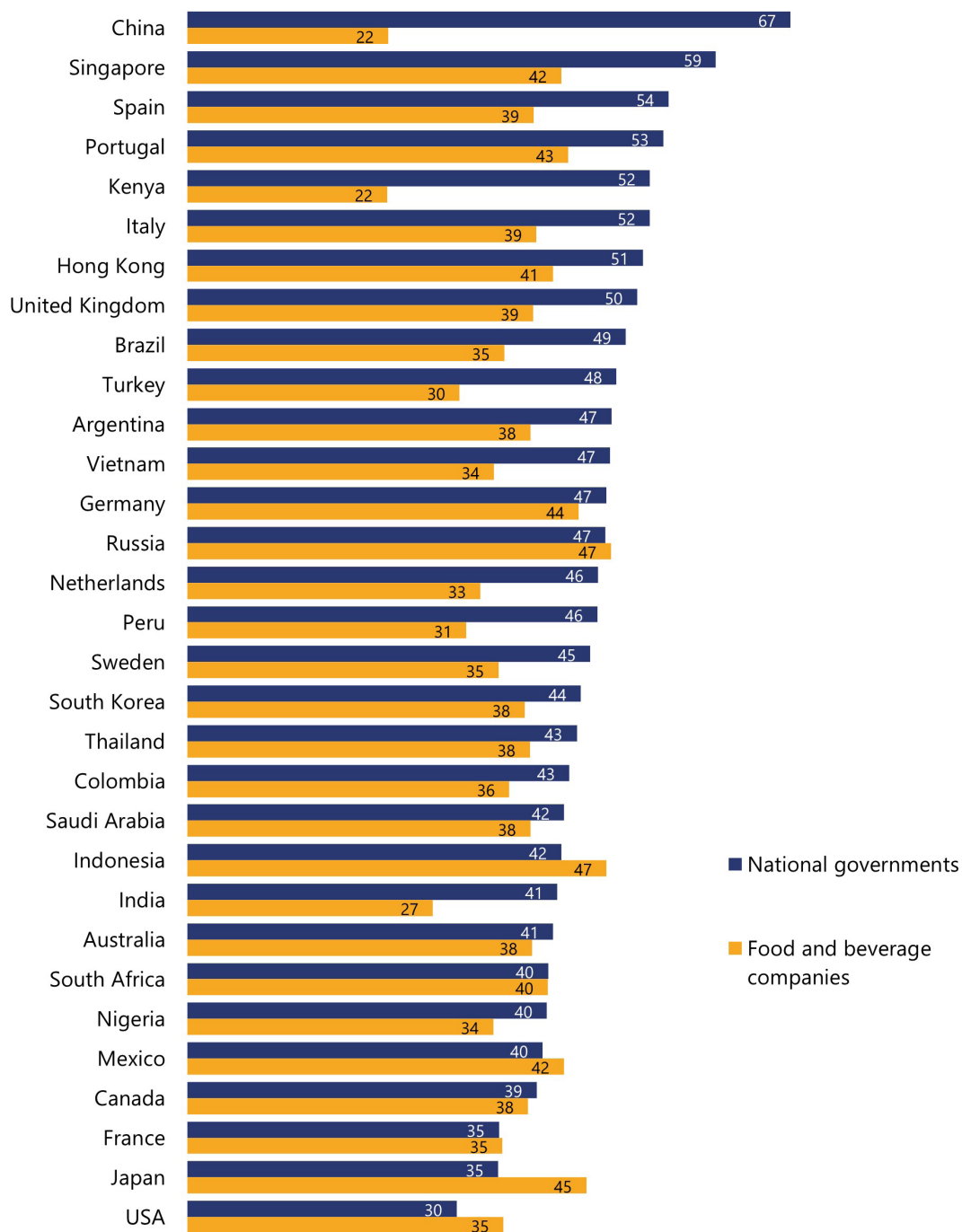


E3. Which of the following actors can most influence positive change in creating a more healthy and sustainable food system? Choose up to three.

Actors that can most influence positive change

Consumers in China and Singapore are most likely to say national governments can most influence positive change; food and beverage companies are mentioned most in Russia, Indonesia, and Japan

Actors That Can Most Influence Positive Change, National Governments vs Food and Beverage Companies, by Market, 2021

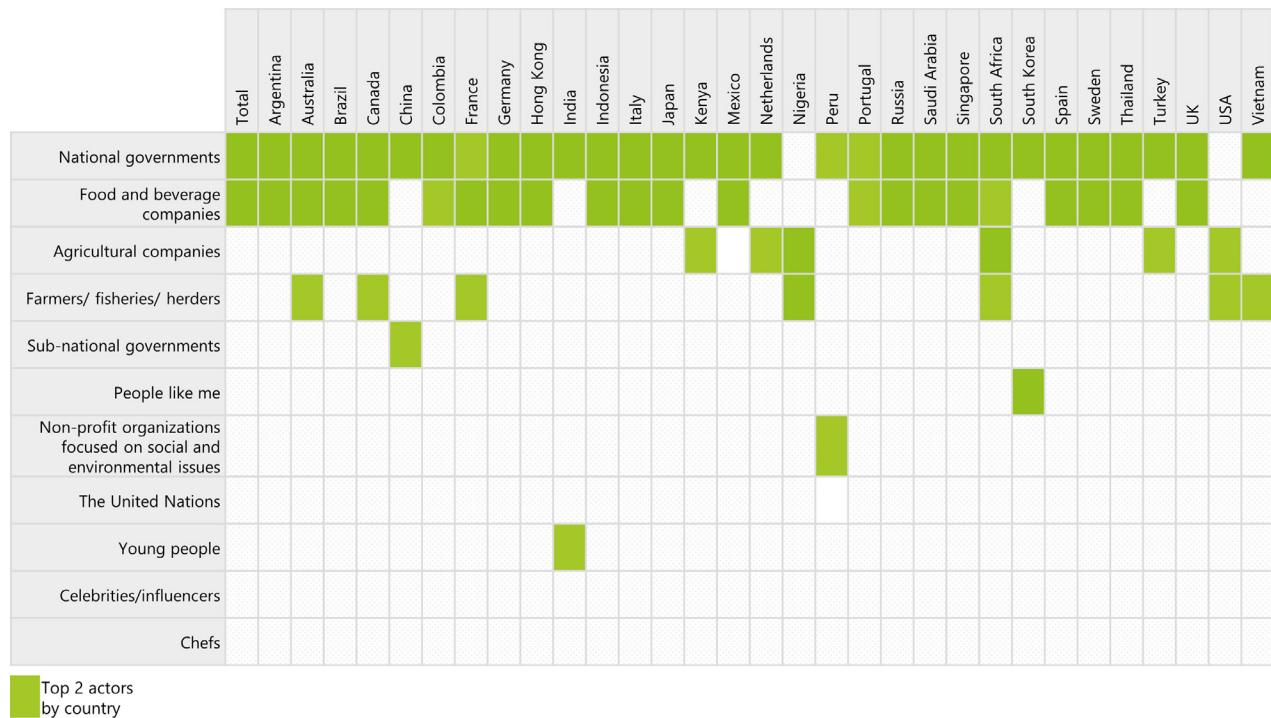


E3. Which of the following actors can most influence positive change in creating a more healthy and sustainable food system? Choose up to three.

Actors that can most influence positive change

National governments and food and beverage companies are seen as the two main influencers of positive change in most markets

Actors That Can Most Influence Positive Change, by Market, 2021

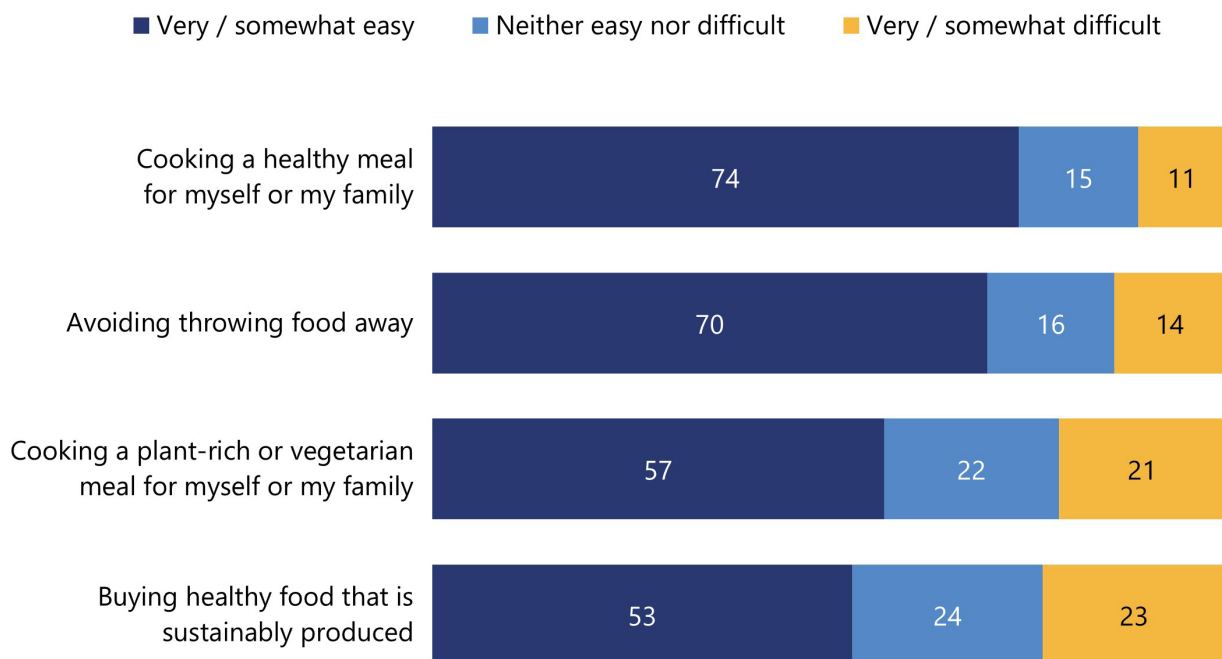


E3. Which of the following actors can most influence positive change in creating a more healthy and sustainable food system? Choose up to three.

Consumer Actions and Barriers

Cooking a healthy meal and avoiding throwing food away are seen as relatively easy; opinion is more divided on cooking a vegetarian meal or buying sustainably produced food

Ease/Difficulty of Actions, Average of 31 Markets, 2021

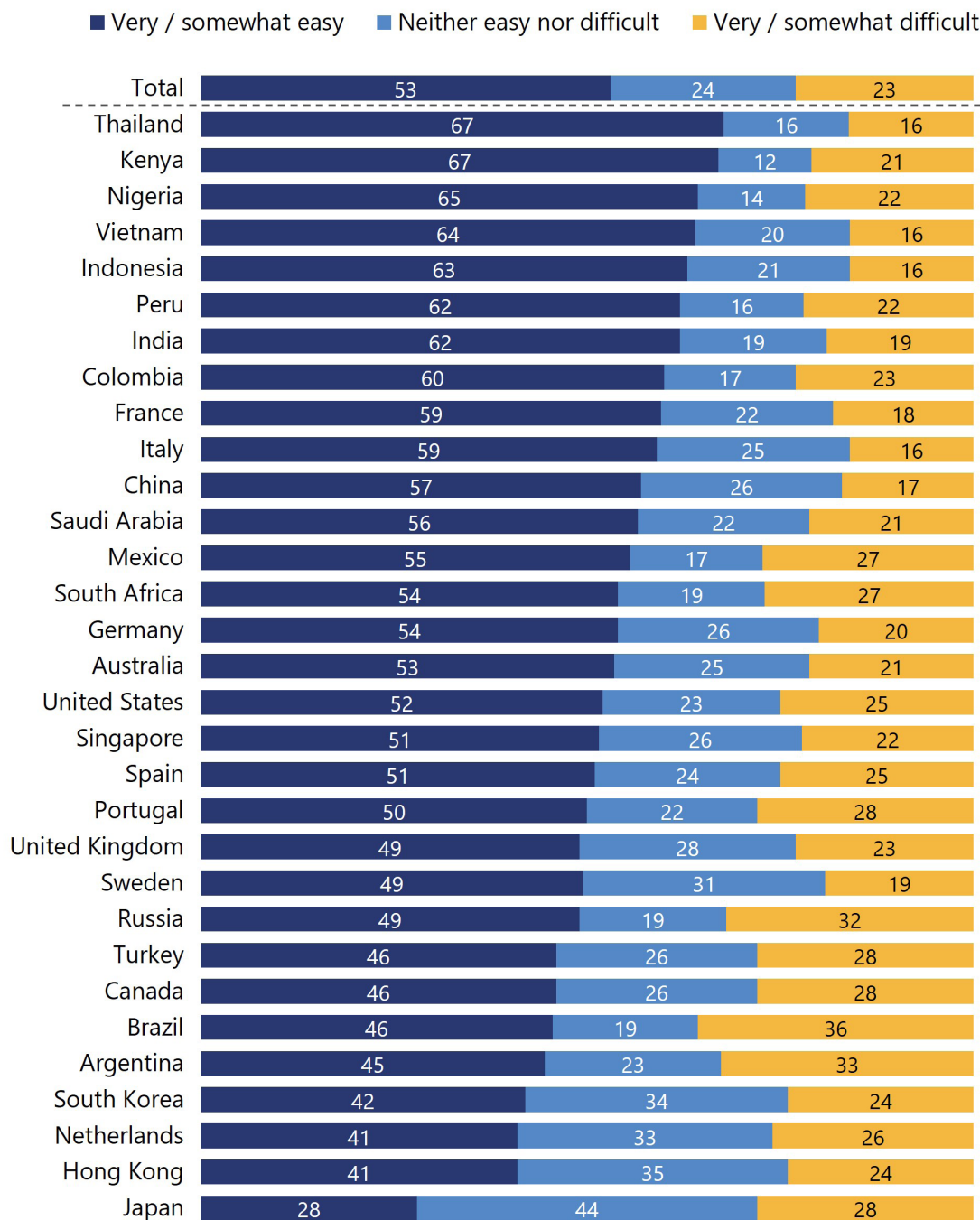


E4. Please indicate how easy or difficult you feel each of the following actions are.

Consumer actions and barriers

Asia is divided between markets where buying sustainably produced food is deemed relatively easy and markets where it is seen as more difficult

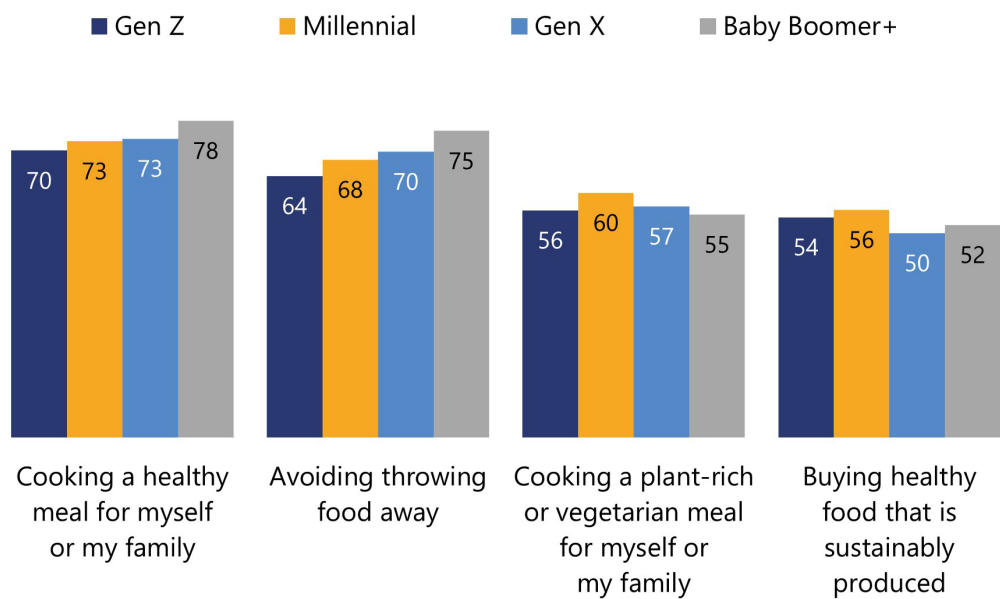
Ease/Difficulty of Buying Healthy Food That Is Sustainably Produced, by Market, 2021



E4. Please indicate how easy or difficult you feel each of the following actions are.

Older people are more likely to say that is easy to cook a healthy meal and to avoid food waste; Millennials are most likely to find cooking plant-based meals and buying healthy and sustainable food to be easy

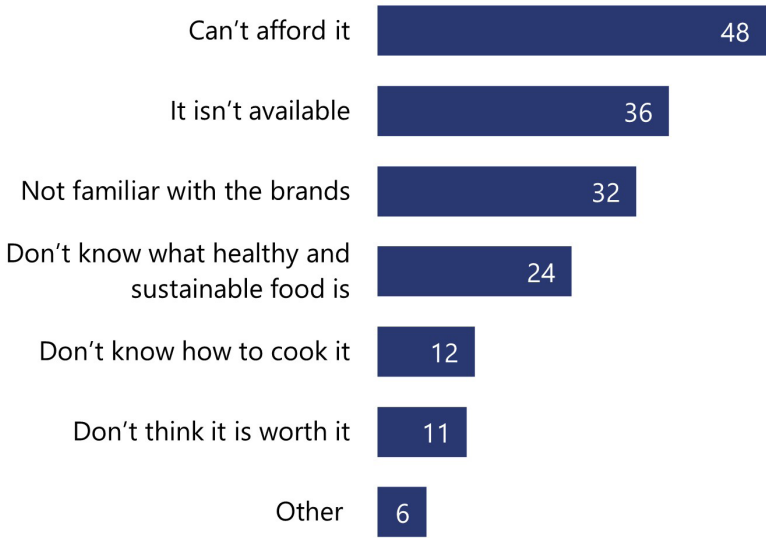
Ease/Difficulty of Actions, "Somewhat" and "Very Easy," Average of 31 Markets, by Generation, 2021



E4. Please indicate how easy or difficult you feel each of the following actions are.

Affordability and availability are the main barriers to buying sustainable food

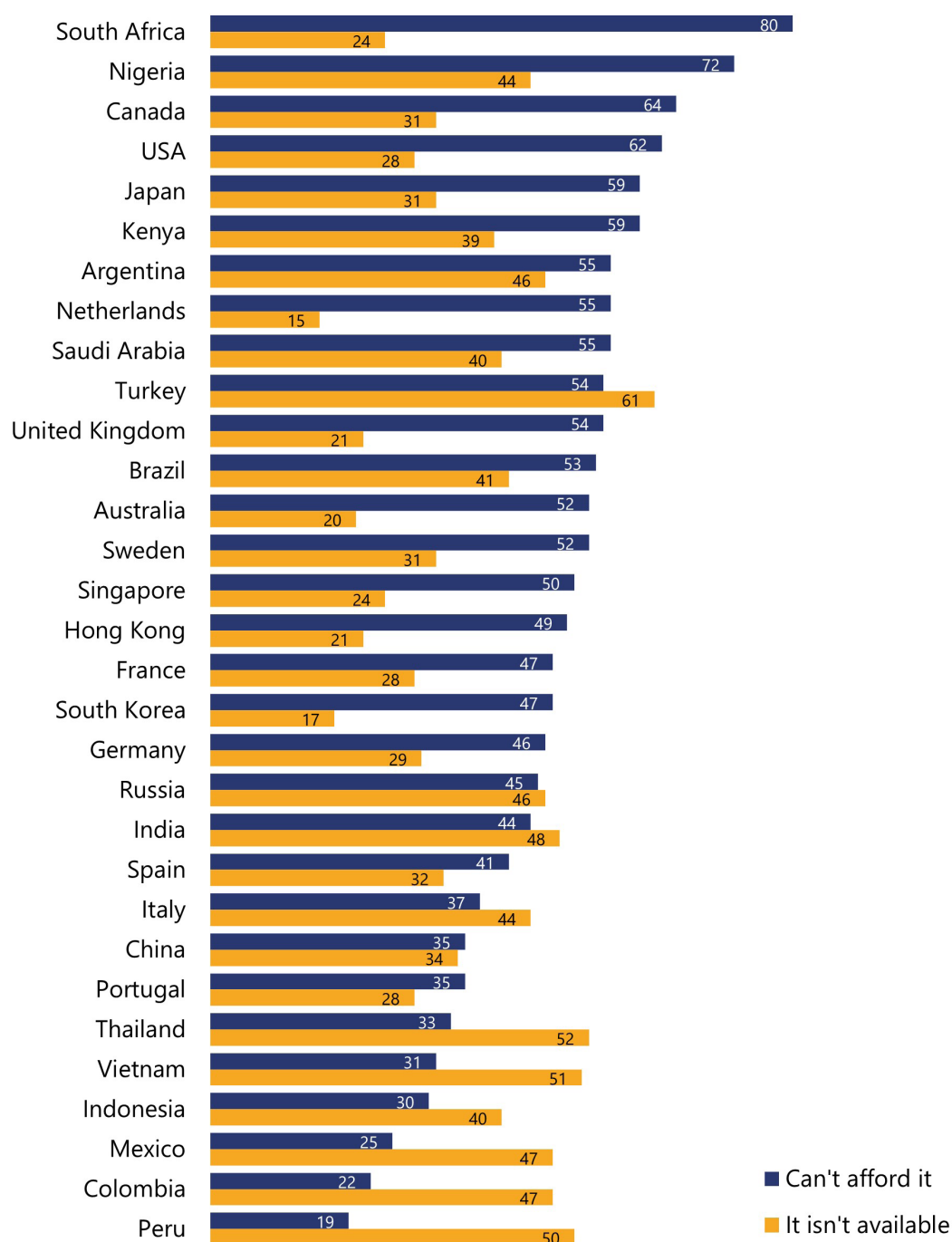
Why It Is Difficult to Buy Healthy and Sustainable Food (Subsample: Those Answering “Somewhat” and “Very Difficult” to Buy Healthy Food That Is Sustainably Produced), Average of 31 Markets, 2021



E5. Why do you find it difficult to buy healthy and sustainable foods? Choose all that apply.

Affordability is a major barrier for most consumers in African countries, but also in Canada, USA, and Japan; availability is a greater issue in Latin America and some Asian markets

Why It Is Difficult to Buy Healthy and Sustainable Food (Subsample: Those Answering "Somewhat" and "Very Difficult" to Buy Healthy Food That Is Sustainably Produced), by Market, 2021



E5. Why do you find it difficult to buy healthy and sustainable foods? Choose all that apply.

Contact Us

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GlobeScan is an insights and strategy consultancy, focused on helping our clients build long-term trusting relationships with their stakeholders. Offering a suite of specialist research and advisory services, we partner with business, NGOs and governmental organizations to meet strategic objectives across reputation, sustainability and purpose.

Established in 1987, GlobeScan has offices in Cape Town, Hong Kong, London, Paris, San Francisco, São Paulo and Toronto, and is a participant the UN Global Compact and a Certified B Corporation.

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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.

eatforum.org

