

toluna   harris  
interactive

# Sustainable Food Barometer *Executive Summary*

05<sup>th</sup> September 2023

 sodexo 



# Research plan

**5246 online interviews**

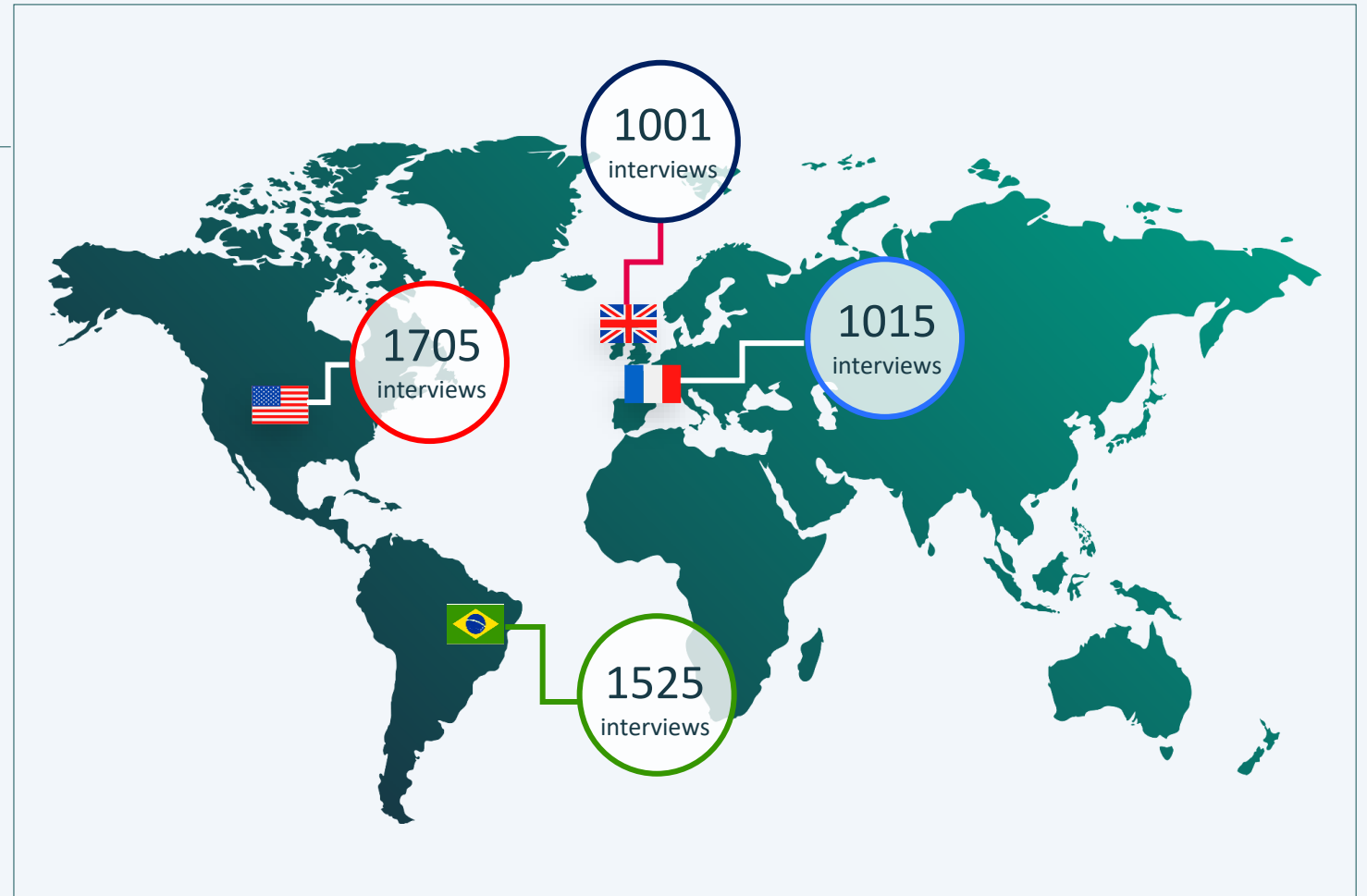
**4 countries**

*National representative samples: sex, age, professional category and region*

*Please note that more people were interviewed in the USA and in Brazil to take into consideration the size of the countries' population*

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**Fieldwork from 26<sup>h</sup> June to 11<sup>th</sup> July 2023**



A photograph of a woven basket filled with several light-colored, slightly dirty potatoes. The basket is placed on dark, rich soil. In the background, more potatoes are visible, some still in the ground. A large, bold white number '1' is positioned in the top left corner. In the top right corner, there is a graphic consisting of four arrows pointing upwards and to the right, with the top-right arrow being white and the others being grey.

# 1

**A spontaneously positive vision, an awareness of a certain urgency, some virtuous behaviors already in place as well as aspirations: a fertile ground for sustainable food**



**A very positive perception of sustainable food, with positive representations outweighing negative ones**

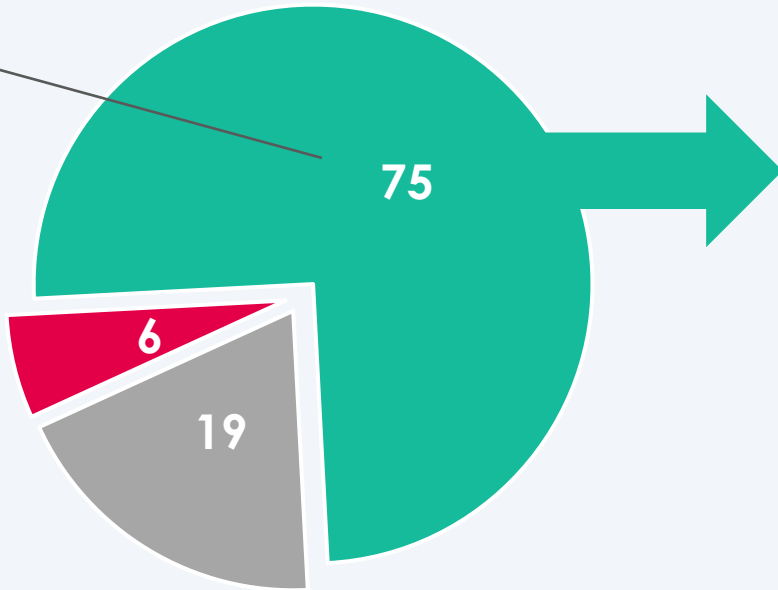
# SUSTAINABLE FOOD: POSITIVE OR NEGATIVE PERCEPTION

## A spontaneously positive perception of sustainable food, with different geographical, economic and generational logics

- To all - In %

Spontaneous perception of the expression "sustainable food"

Very Positive  
44



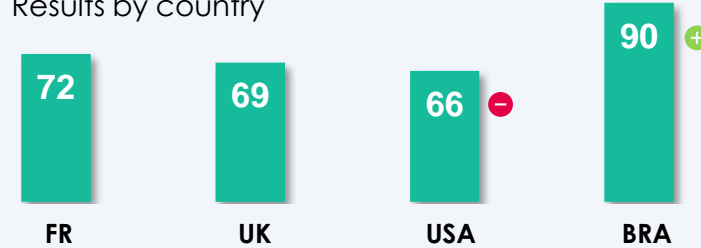
- Positive
- Neither positive nor negative
- Negative

👍 Positive

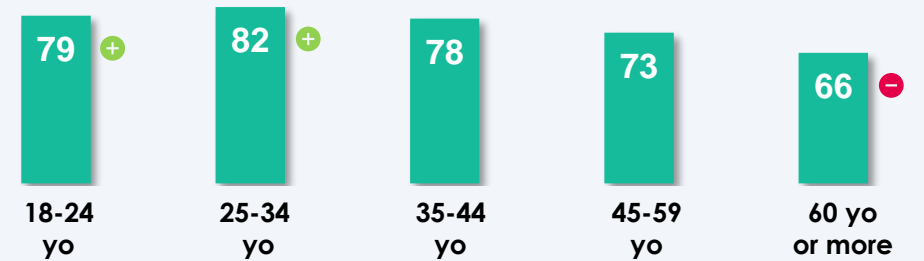
👍 Positive

👍 Positive

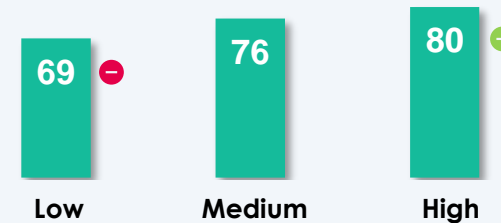
Results by country



Results by age



Results by income level

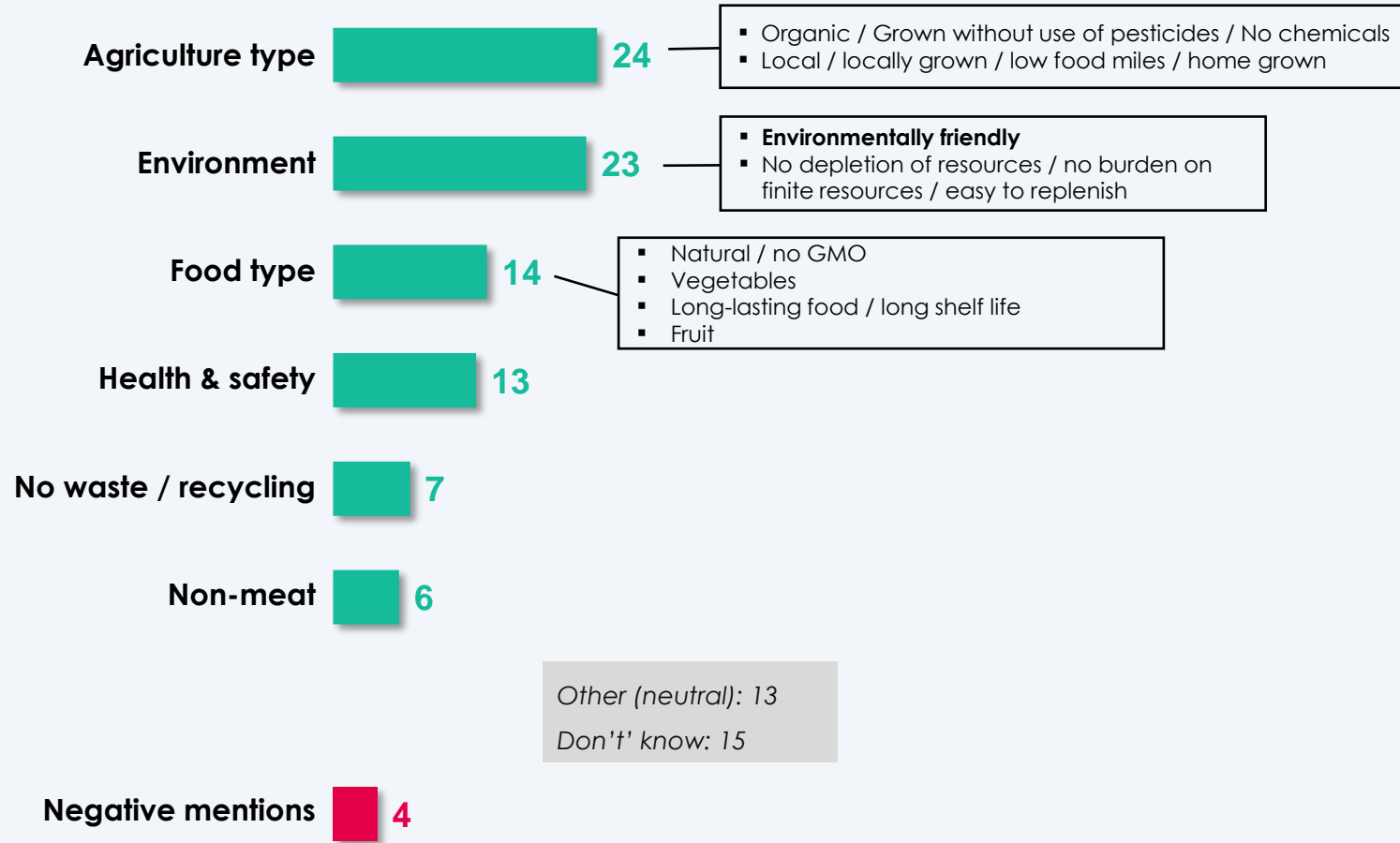








# SPONTANEOUS REPRESENTATIONS ASSOCIATED WITH SUSTAINABLE FOOD

**Representations focus first and foremost on natural and local farming methods that respect the environment. Few spontaneous references to virtuous effects on health or the absence of meat**

- To all - In %



### Special features

- 
  - + Agriculture type
  - Health & safety, non-meat
- 
  - + Environment, no waste / recycling, non-meat
  - Agriculture type, food type, health & safety
- 
  - + Non-meat
  - Agriculture type, environment, health & safety, no waste
- 
  - + Food type, health & safety
  - No waste, non-meat

# OTHER REPRESENTATIONS ASSOCIATED WITH ADOPTING A MORE SUSTAINABLE FOOD OF EATING

**Positive imaginary: collective responsibility, benefits on quality of life and delight**

**Neutral or negative imaginary: adaptation efforts, products accessibility, price**

- To all – In %

... worsens quality of life



... improves quality of life

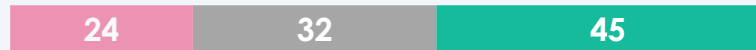
... is above all a **personal choice**: to respect oneself, to be aligned with one's values...



... is above all a **collective responsibility**: to respect the planet and current and future generations...



... reduces delight moments



... provides more delight moments

... requires a **lot of effort** to adapt



... does not require much effort to adapt



... is difficult because it's **hard to find** sustainable products



... is easy – sustainable products are easy to find



... costs more



... saves money

■ **Negative perception**  
(Rates 1 or 2)

■ **Neutral perception**  
(Rate 3)

■ **Positive perception**  
(Rates 4 or 5)



**Behaviors and attitudes that  
tend to favor installation of  
sustainable food**



# ABILITY TO ADOPT DIFFERENT BEHAVIORS TO MOVE TOWARDS A MORE SUSTAINABLE DIET

**Some virtuous behaviors are already well established, especially in France and Brazil**

- To all - In %



## I already do it



**Reduce food waste**  
in your household

71%



**Consume**  
**seasonal products**  
whenever possible

63%



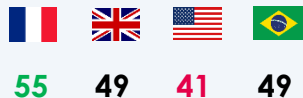
**Buy local products**  
whenever possible

55%



**Reduce your**  
**consumption of**  
**processed foods**

48%



**Avoid plastic**  
**packaging**

46%



**Consume sustainably**  
**produced products**  
whenever possible

40%



# WISH TO EAT SUSTAINABLE FOOD IN DIFFERENT PLACES RATHER THAN AT HOME

**And a majority wish to eat more sustainably than at home, with nuances depending on location and country**

- To all - In %



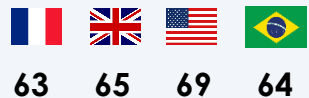
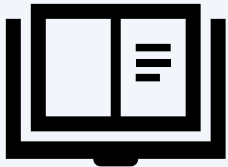
Proportion of the population wishing to eat more sustainable products than at home, by location



66

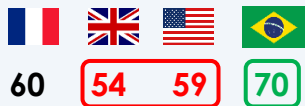
Students

School /  
University



61

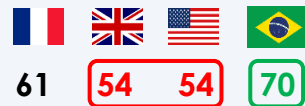
Restaurant



60

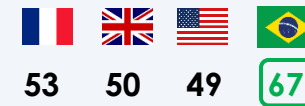
Parents

School /  
University



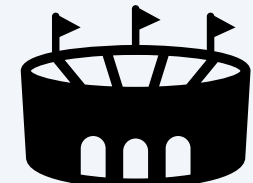
56

Company  
cafeteria



50

Sporting /  
Cultural event

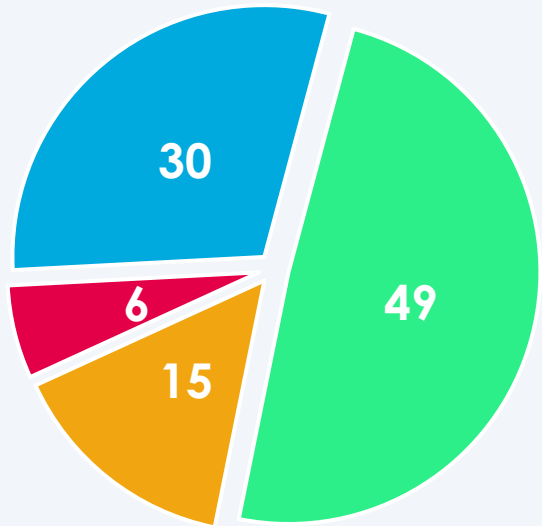


# PERCEIVED LEVEL OF URGENCY TO ADOPT A MORE SUSTAINABLE WAY OF EATING

**A sense of urgency shared by a majority of the population, whatever their profile or country**

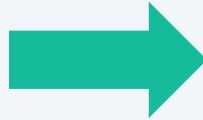
- To all - In %

**Adopting more sustainable food: is it urgent?**



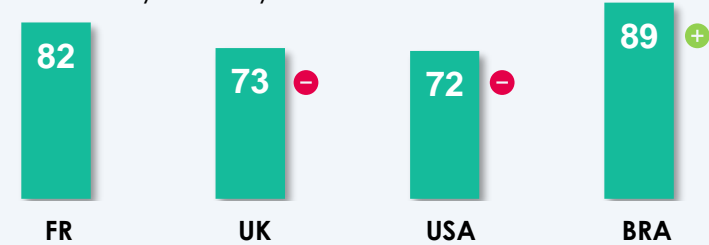
- Yes, definitely
- Yes, somewhat
- No, rather not
- No, not at all

**TOTAL Urgent 79**

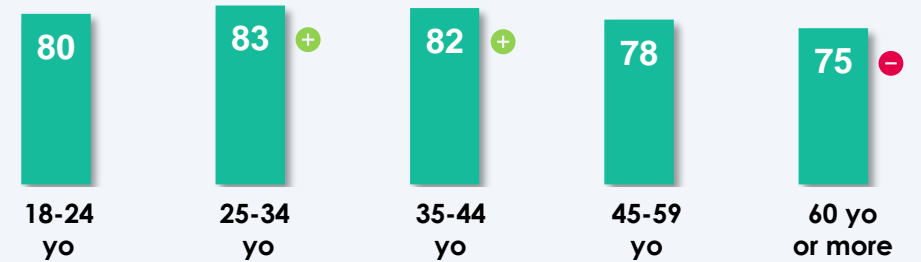


Urgent

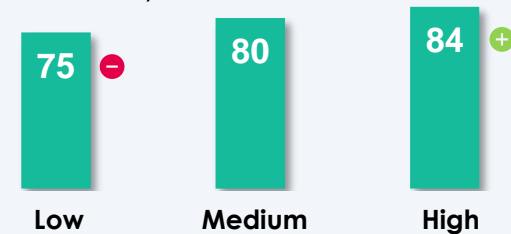
Results by country



Results by age



Results by income level



Urgent

Urgent





# 2

But good intentions come up against deeply rooted eating habits, and a gap appears between practices and wishes

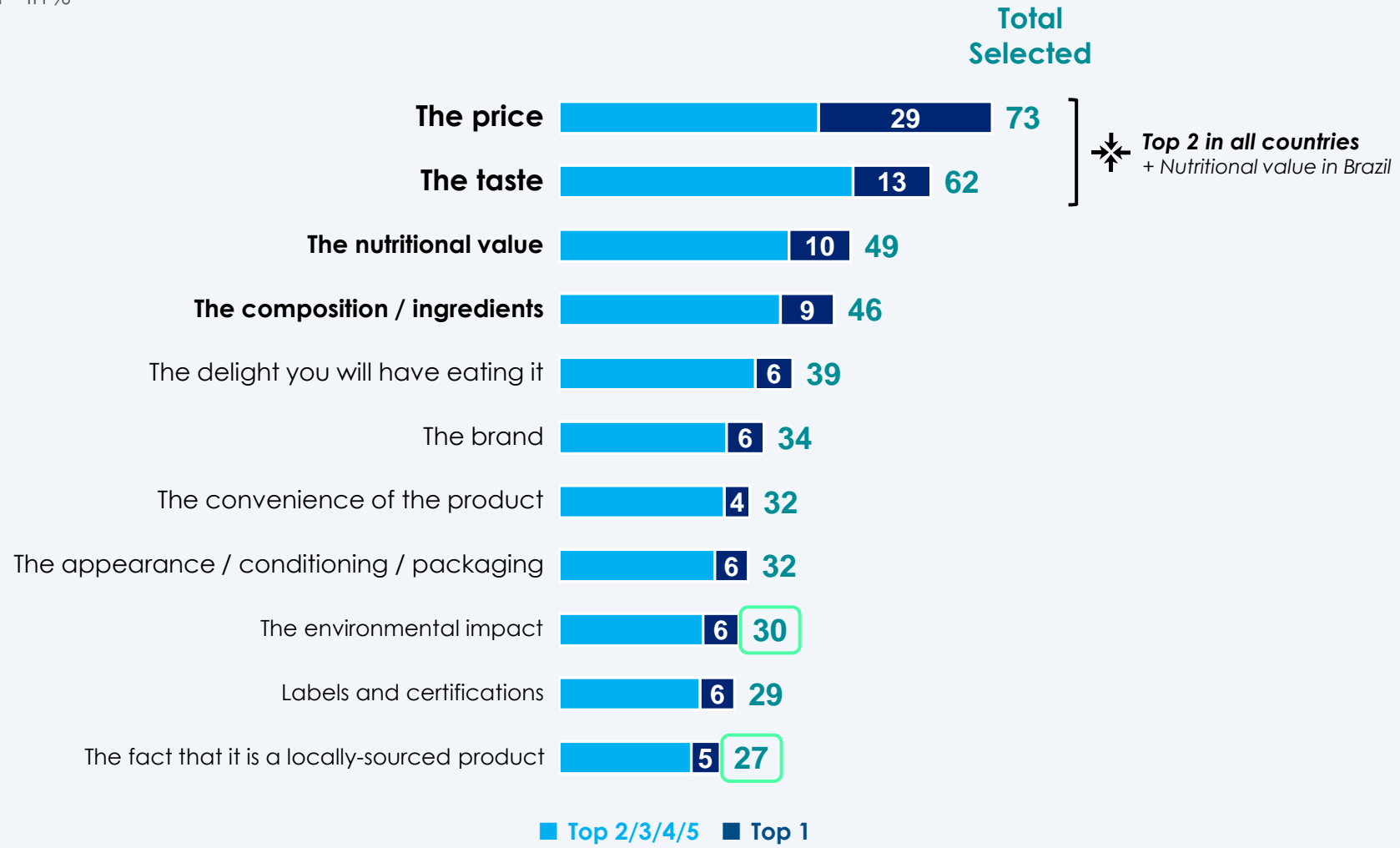


**Today, environmental and local considerations are still minor when it comes to choosing a food product...**

# CRITERIA FOR CHOOSING FOOD PRODUCTS

**Behind price and taste, environmental and local considerations rank quite far when it comes to choosing a food product**

- To all - In %

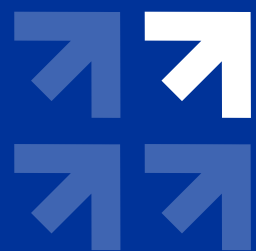


✳ **Top 2 in all countries**  
+ Nutritional value in Brazil

### Special features

- 
 Locally-sourced Ingredients Delight
- 
 Taste Price
- 
 Nutritional value Price
- 
 Nutritional value Environmental impact Appearance / Packaging Labels and certifications





**... and declared intentions  
do not lead to real concrete  
changes in deeply rooted  
eating habits**

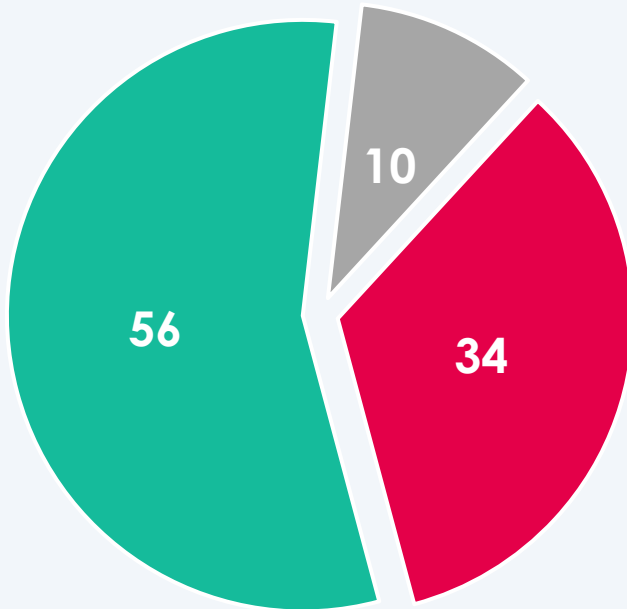
# PERCEPTION OF ONE'S DAILY MEALS IN RELATION TO A "SUSTAINABLE PLATE"

## Why change?

When asked, people all consider that their plate is closer to a sustainable plate than it is farther away

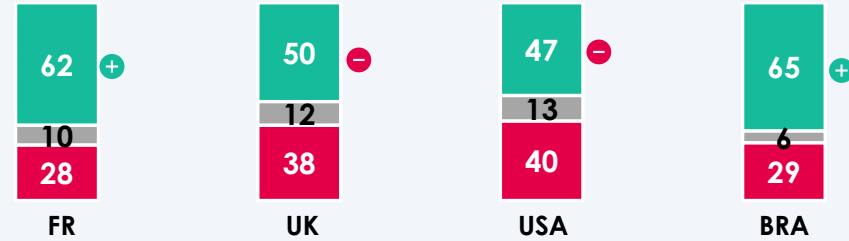
- To all - In %

My daily plate in comparison to a sustainable plate

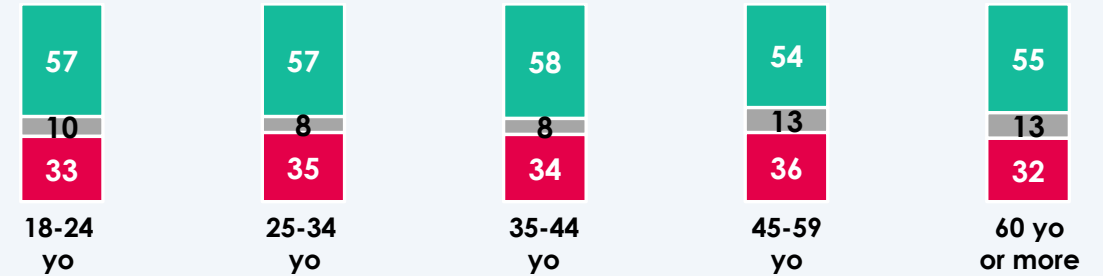


- Close
- I can't tell
- Far

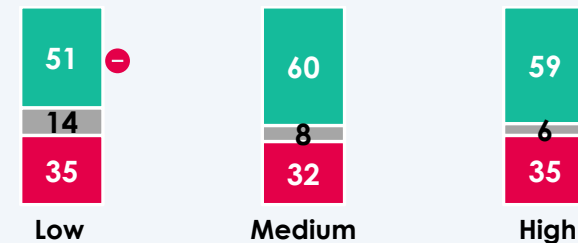
Results by country



Results by age



Results by income level

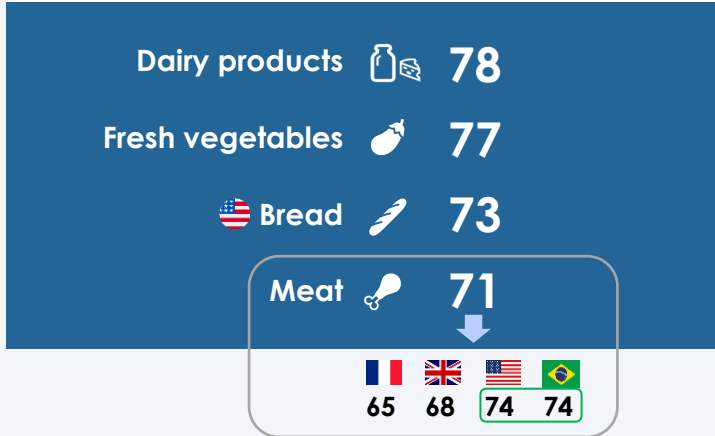


# FREQUENCY OF CONSUMPTION OF VARIOUS PRODUCTS

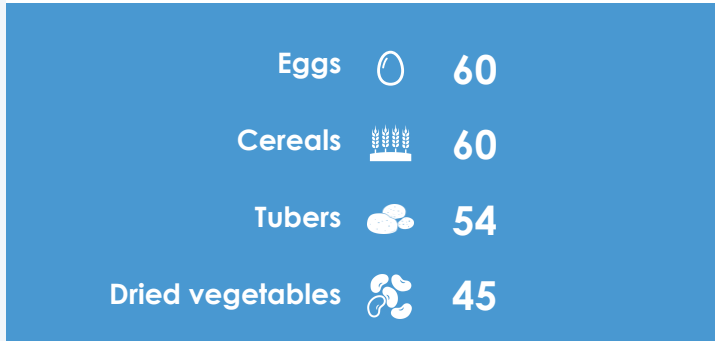
Today, in our 4 countries, dairy products and animal proteins occupy a place of choice in people's diets...

- To all - In %

## Very regular consumption \*



## Regular consumption \*



## Occasional consumption \*



## Rarer consumption \*



## Special features

- + Dairy products
  - Cereals, Eggs, processed food, dried vegetables
- + Mushrooms, dairy products
  - Eggs, dried vegetables, oilseeds
- + Meat, fast food meals, processed foods, oilseeds, seafood, shellfish
  - Tubers, dried vegetables
- + Meat, dried vegetable, tubers, eggs, cereals, fresh vegetables, soy derivatives
  - Mushrooms, fast food meals, dairy products



# ABILITY TO ADOPT DIFFERENT BEHAVIORS TO MOVE TOWARDS A MORE SUSTAINABLE DIET

## ... and the reluctance to stop eating meat and/or fish is widespread

- To all - In %

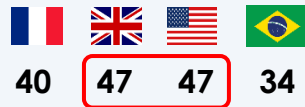


### I don't do it and I don't have the desire / intention to do it

#### Stop eating meat *(especially red meat)*



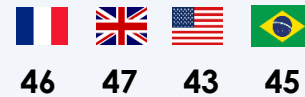
# 42%



#### Stop eating fish



# 45%



# MEAT: ACCEPTANCE OF CONSTRAINTS/ALTERNATIVES

**In the event of a reduction in meat consumption, readjustments are planned but no diet habits upheavals**

- To all - In %



	<b>+</b>	<b>Alternatives</b>	<b>Reminder</b>	<b>Current consumption</b>
1		Fresh vegetables		<b>2</b> <sup>/15</sup>
2		Eggs		<b>4</b> <sup>/15</sup>
3		Dairy products		<b>1</b> <sup>/15</sup>
4		Cereals		<b>5</b> <sup>/15</sup>
5		Tubers		<b>6</b> <sup>/15</sup>
6		Bread		<b>3</b> <sup>/15</sup>
7		Dried vegetables		<b>7</b> <sup>/15</sup>
8		Pasta		<b>8</b> <sup>/15</sup>
9		Fish		<b>10</b> <sup>/15</sup>
10		Oilseeds		<b>9</b> <sup>/15</sup>
11		Mushrooms		<b>11</b> <sup>/15</sup>
12		Seafood, shellfish		<b>12</b> <sup>/15</sup>
13		Algae		<b>15</b> <sup>/15</sup>
14		Insect meals and derivatives		<b>14</b> <sup>/15</sup>
15		Soy derivatives		<b>13</b> <sup>/15</sup>





3

What could make people change  
their food habits?  
A promise and a commitment



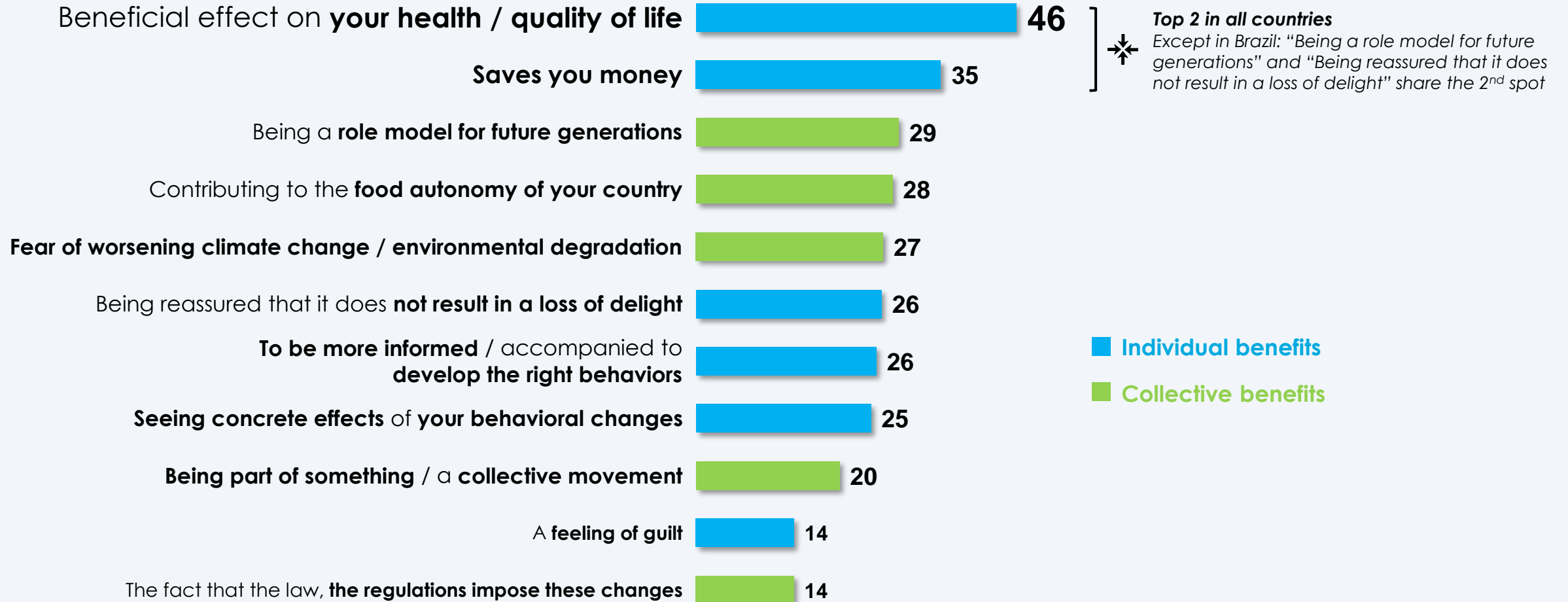
**A promise: moving towards a sustainable diet must be accompanied by individual benefits**



# LEVERS FOR THE ADOPTION OF A MORE SUSTAINABLE FOOD CONSUMPTION

**While spontaneous representations of the subject give pride of place to collective responsibility, the projected benefits are primarily individual, first and foremost positive effects on health**

- To all - In %





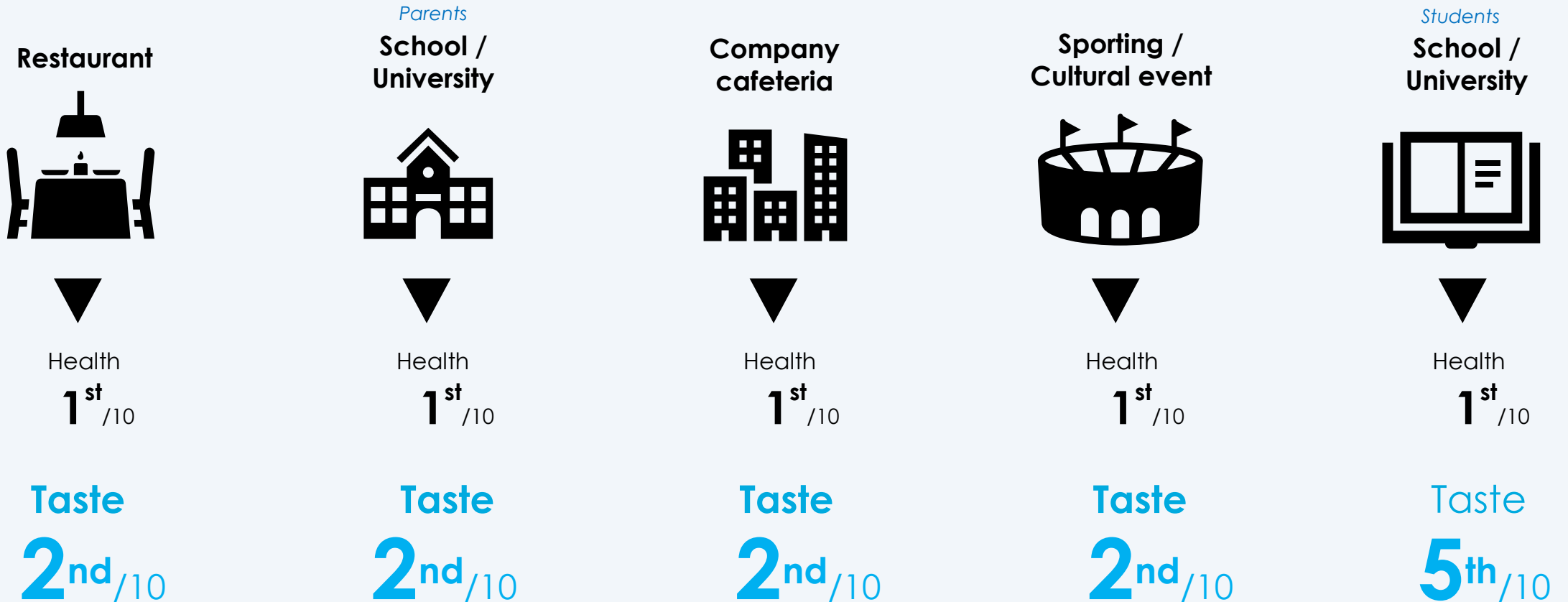


**Sustainable products must also  
provide enjoyable taste, and be  
easy to find**

# LEVERS TO ADOPT A MORE SUSTAINABLE DIET IN DIFFERENT PLACES

**Behind the health benefits, the question of taste (and therefore pleasure) is central**

- To all - In %

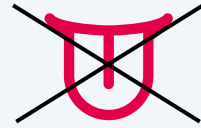


**Taste** → “These dishes or products are more delicious than preparing them at home”

# BARRIERS TO THE CONSUMPTION OF MEAT ALTERNATIVES

And taste, or rather the absence of taste, is also one of the main obstacles to be overcome

- To all – In %



## Lack of taste / flavor



Cereals

1<sup>ST</sup>/10



Tubers

1<sup>ST</sup>/10



Dried vegetables

1<sup>ST</sup>/10



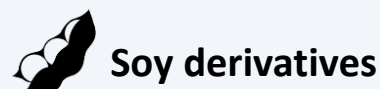
Mushrooms

1<sup>ST</sup>/10



Insect meals  
and derivatives

1<sup>ST</sup>/10



Soy derivatives

1<sup>ST</sup>/10



Algae

1<sup>ST</sup>/10



Fresh vegetables

2<sup>nd</sup>/10



Eggs

2<sup>nd</sup>/10



Dairy products

2<sup>nd</sup>/10



Bread

2<sup>nd</sup>/10



Fish

2<sup>nd</sup>/10



Seafood, shellfish

2<sup>nd</sup>/10



Oilseeds

2<sup>nd</sup>/10



Pasta

2<sup>nd</sup>/10

## FOCUS ON ACCESSIBILITY

The accessibility of sustainable products is also a significant barrier (real or projected)

- To all – In %

**Availability**  
Sustainable food is not sufficiently proposed in these places

Parents  
School / University



1<sup>ST</sup>/10

Company cafeteria



2<sup>ND</sup>/10

Sporting / Cultural event



2<sup>ND</sup>/10

Students  
School / University



3<sup>TH</sup>/10

Restaurant



4<sup>TH</sup>/10

**Lack of availability**  
A barrier for meat alternatives



Insect meals and derivatives

3<sup>TH</sup>/10



Oilseeds

3<sup>TH</sup>/10



Mushrooms

3<sup>TH</sup>/10



Algae

3<sup>TH</sup>/10



Seafood, shellfish

3<sup>TH</sup>/10



**A commitment: high expectations emerge towards the farmers and the food industry**

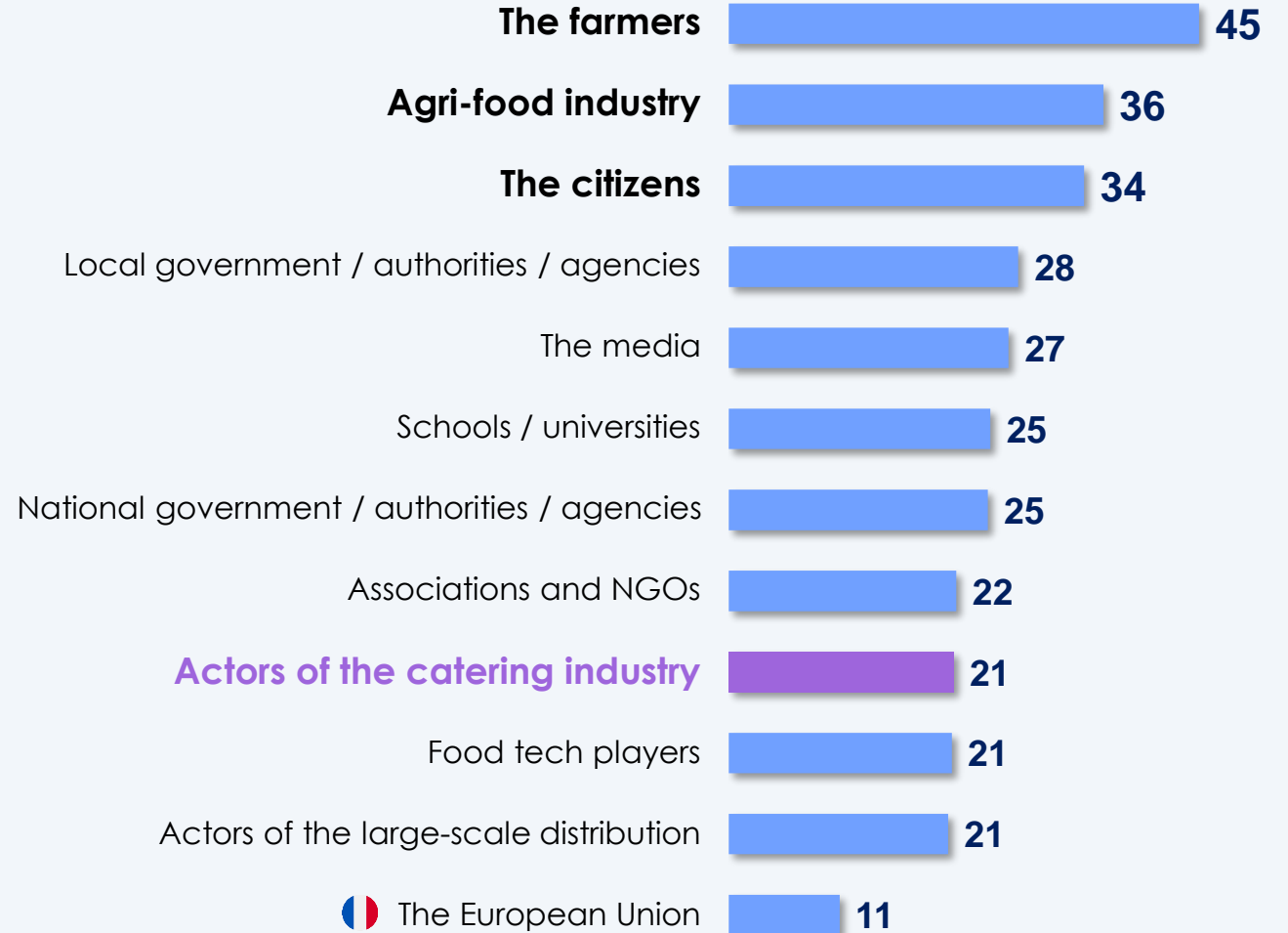
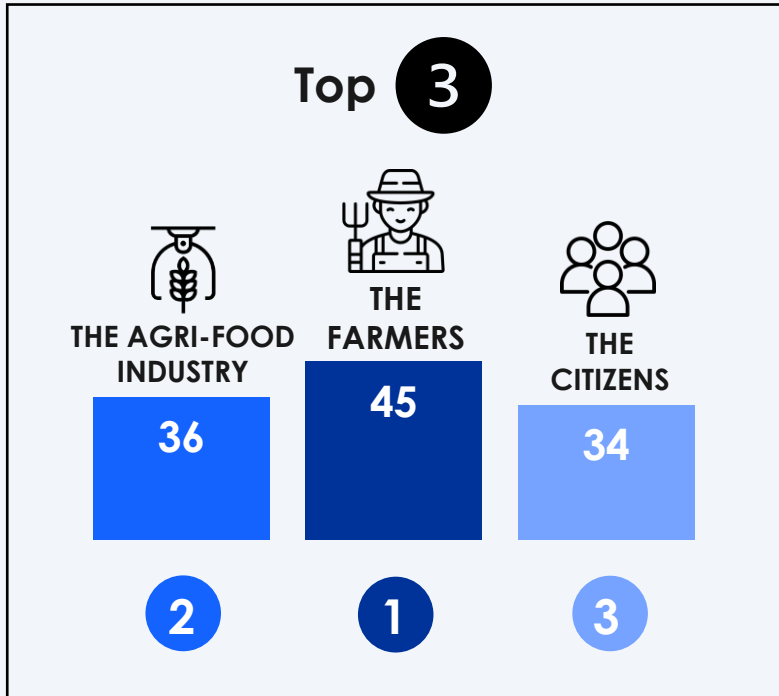


# STAKEHOLDERS MOST LIKELY TO INFLUENCE THE TRANSITION TO A MORE SUSTAINABLE DIET

**First the farmers, then the agri-food players and the citizens themselves**

**The actors of the catering industry are much further afield**

- To all - In %

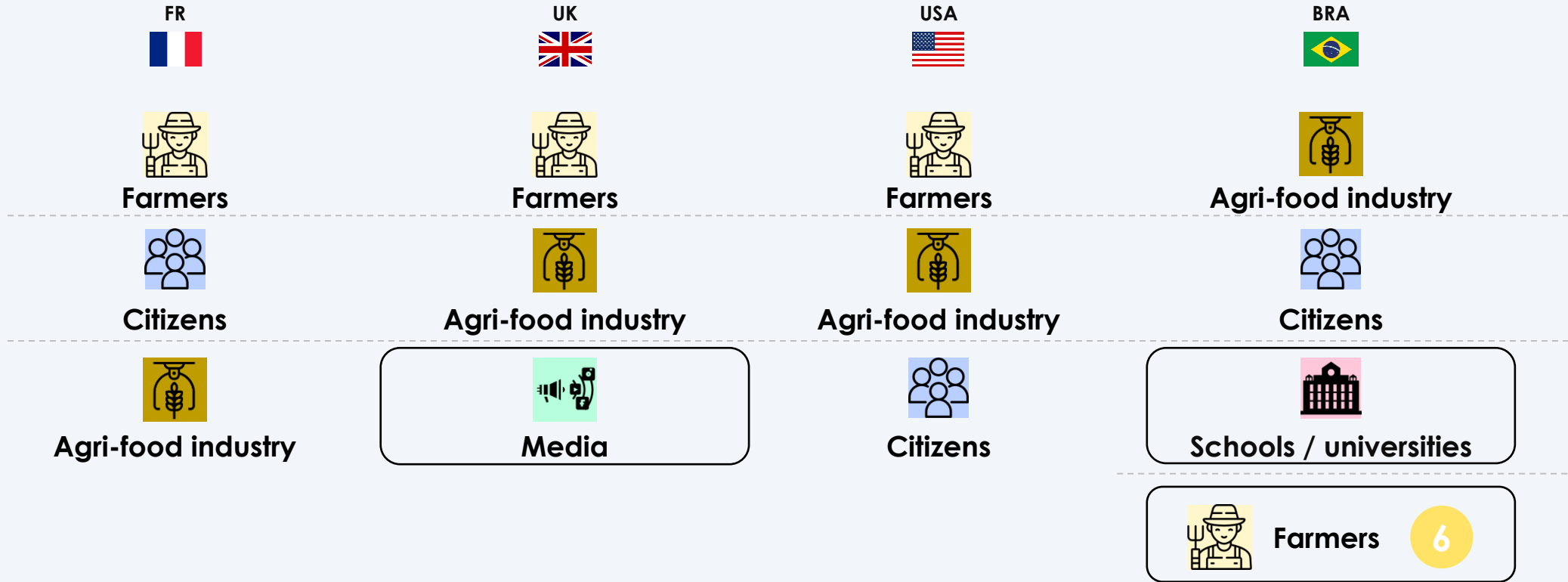


# STAKEHOLDERS MOST LIKELY TO INFLUENCE THE TRANSITION TO A MORE SUSTAINABLE DIET

## Some specificities in Brazil and in the UK

- To all - In %

T  
O  
P  
3



Actors of the catering industry

Ranking

7

10

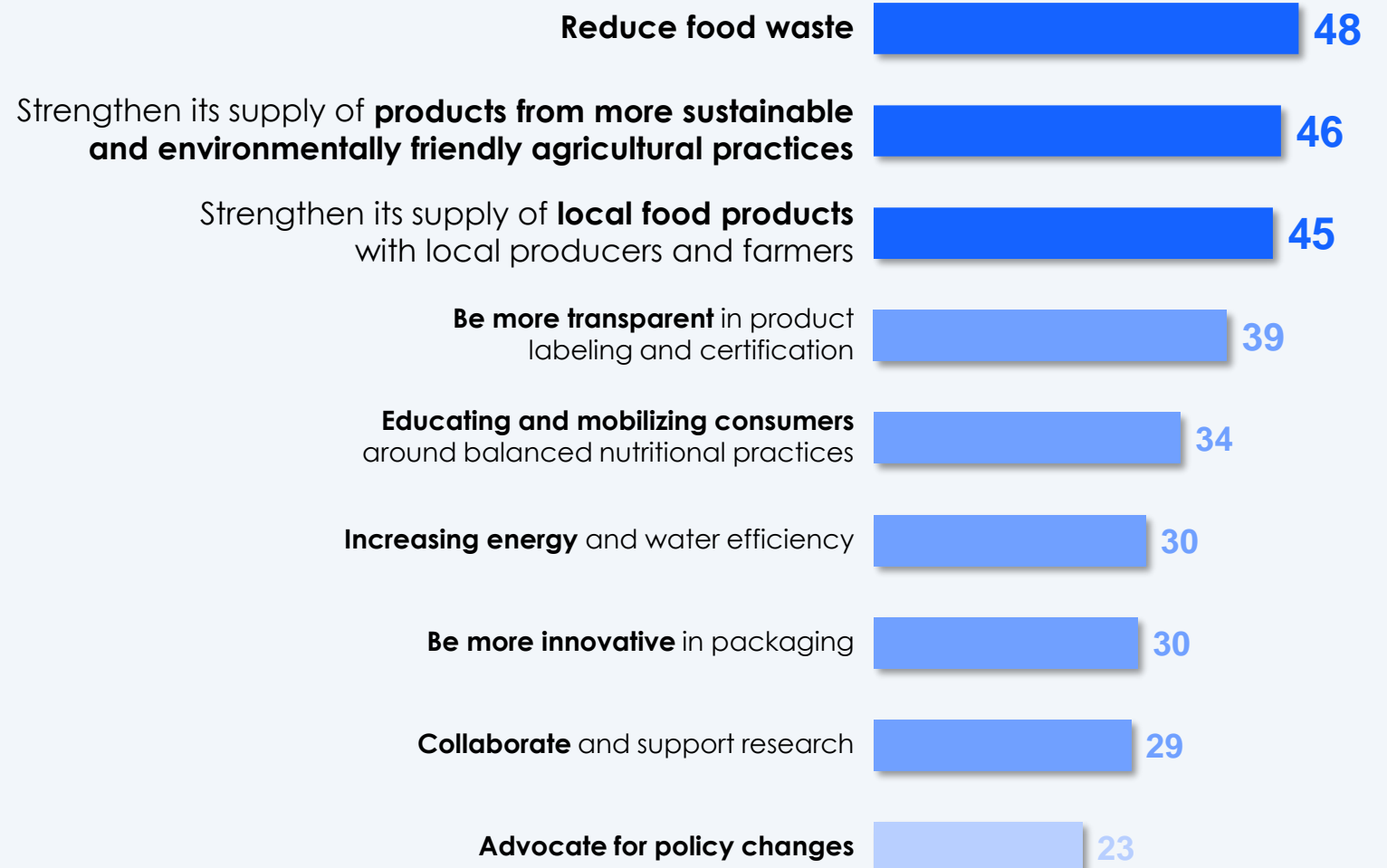
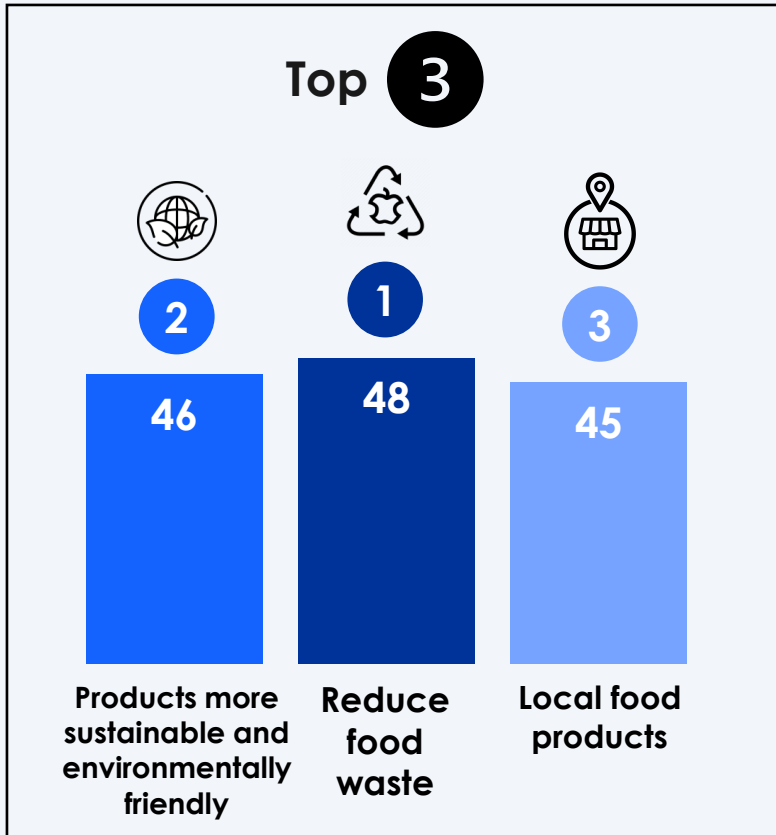
11

7

# EXPECTATIONS TOWARDS THE MAJOR PLAYERS IN THE FOOD INDUSTRY

**3 main expectations: reducing food waste, strengthening its supply of products from more sustainable and environmentally friendly agricultural practices and promoting local food/products**

- To all - In %



# 4

## Undeniable generational divides



# THINKING ABOUT ADOPTING A SUSTAINABLE DIET: EMOTIONS FELT

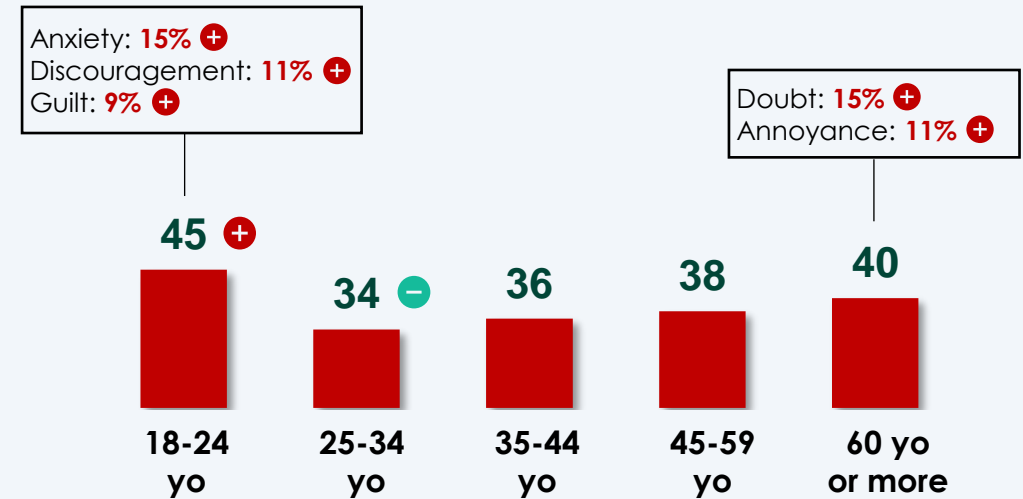
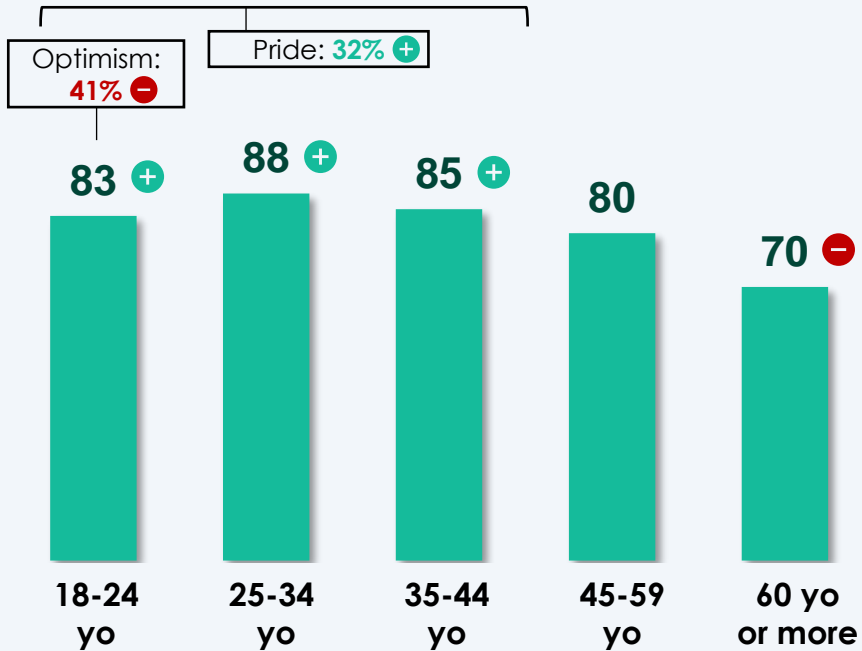
High engagement and mixed feelings for the youngest, while 60 y.o. and more are the less positive about the topic

- To all - In %

## Positive emotions



## Negative emotions



+ **With children:** Pride (31% +), Fulfillment (36% +)

+ **Without children:** Annoyance (10% +), Uselessness (8% +)



# LEVERS FOR THE ADOPTION OF A MORE SUSTAINABLE FOOD CONSUMPTION

**Older generations clearly concentrate more on individual benefits – health and money – while younger focus particularly on collective ones**

- To all – In %

## ■ Individual benefits

	Total	18-24 yo	25-34 yo	35-44 yo	45-59 yo	60 yo or more	With children	Without children
Beneficial effect on health / quality of life	46	37	39	43	49	54	46	45
Saving money	35	28	28	34	38	42	34	36
To be more informed / accompanied	26	24	26	25	27	25	27	24

## ■ Collective benefits

Role model for future generations	29	35	33	31	28	22	31	26
Feeling of being part of a collective movement	20	23	23	23	20	16	21	20
Feeling of guilt	14	21	17	17	12	8	13	14

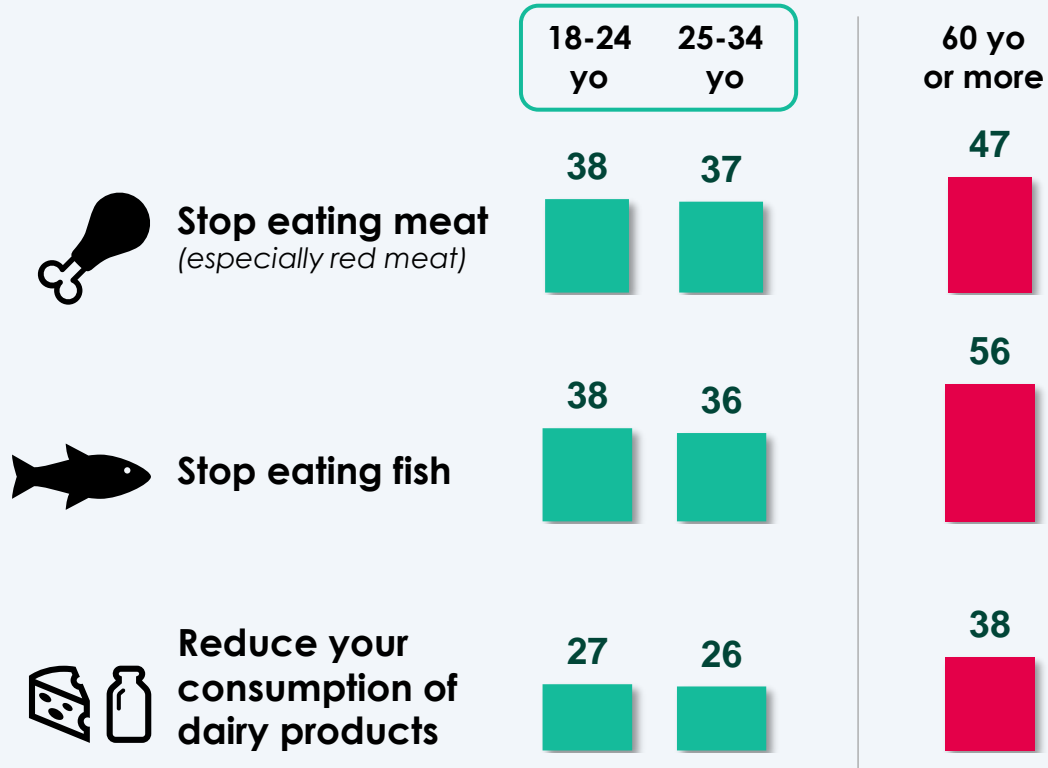
# ABILITY TO ADOPT DIFFERENT BEHAVIORS TO MOVE TOWARDS A MORE SUSTAINABLE DIET

**Yet, some discrepancies appear among young people between perception, aspirations and behaviors**

- To all - In %

## Less reluctance among younger concerning the type of products...

 I don't do it and I don't have the desire / intention to do it



## ...but virtuous behaviors are way more spread among older citizens

 I already do it



## Contacts

Please note that any **publication of these results** must be accompanied by the following technical elements: the **name of the research company**, the **name of the commissioner of the research**, the **survey methodology**, **fieldwork dates** and **sample size**.

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