toluna harris interactive

# Sustainable Food Barometer

## Wave 2 - 2024

## Executive Summary

sodexo

# Research plan

**7299 online interviews**

**5 countries**

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

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

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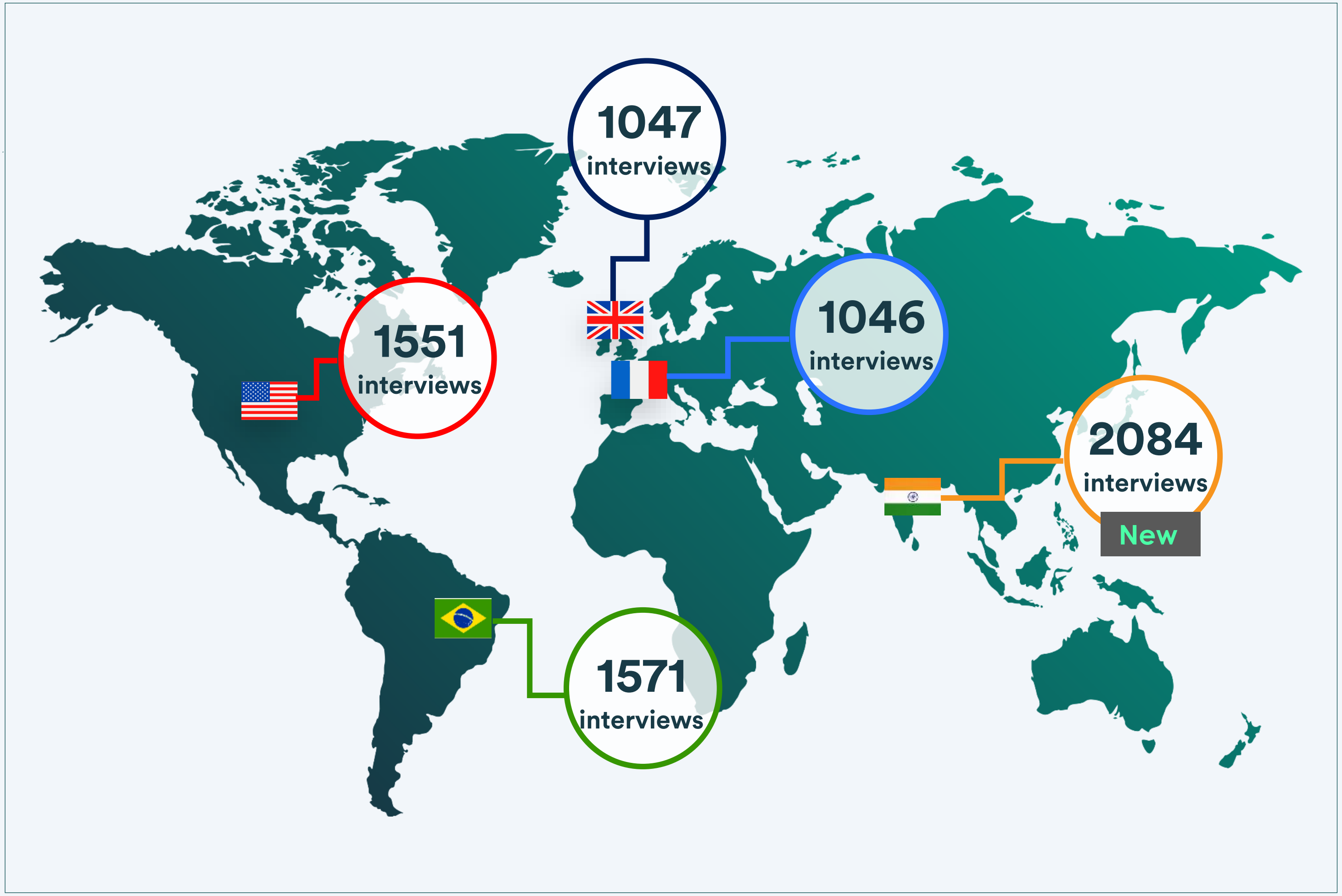
**Fieldwork from 04 to 16 July 2024**




! The results presented at global level exclude India in order to be fully comparable with 2023. Results for India are presented in parallel.

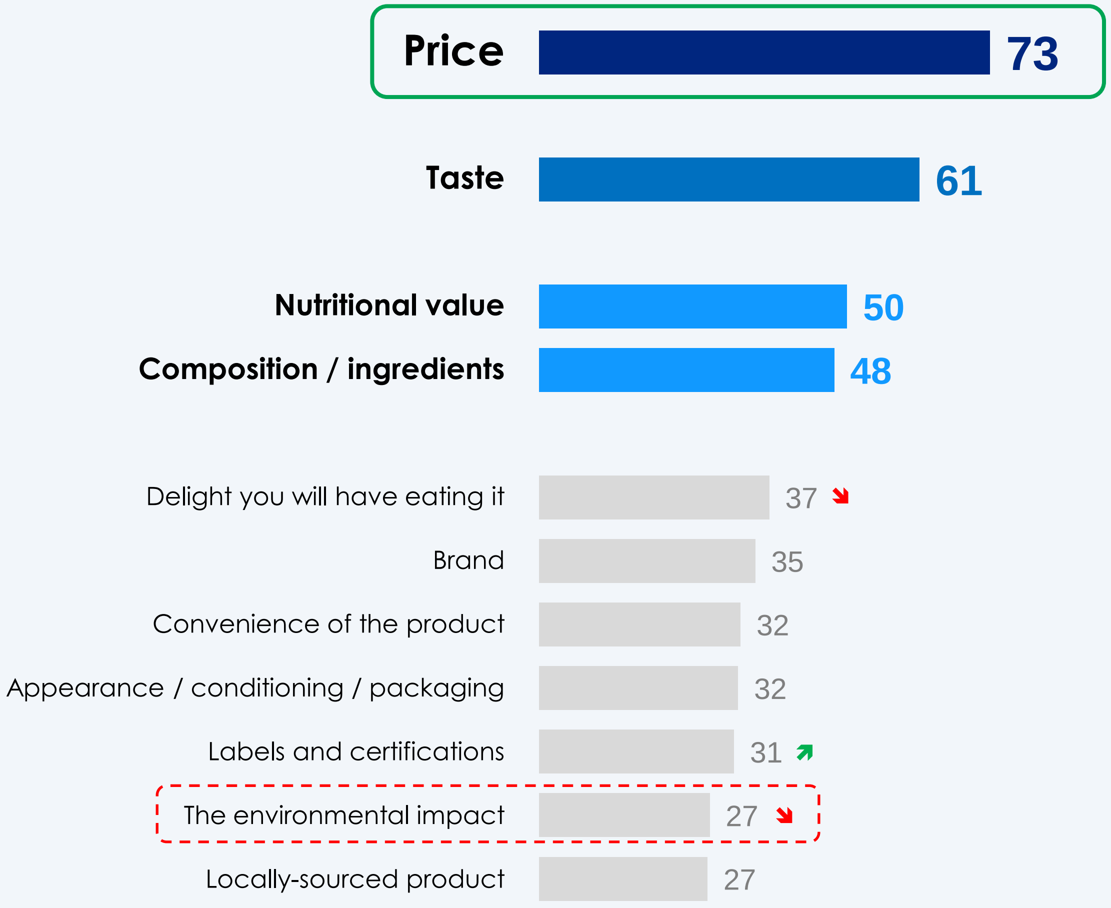

1
Despite an inflationary context that weighs on enthusiasm toward sustainable food, perceptions are still largely positive across all geographies

# Lasting inflationary context puts purchasing power at the center of concerns

# A sustained inflationary context that puts environmental concerns on the back burner and reinforces price as the core element of choice

- To all – In %

## Criteria for choosing food products




**Young people (18 – 25 yo) are no exception to this trend**

**PRICE** €

**73%**

+3 pts vs Wave 1

**THE ENVIRONMENTAL IMPACT**

**27%**

-3 pts vs Wave 1

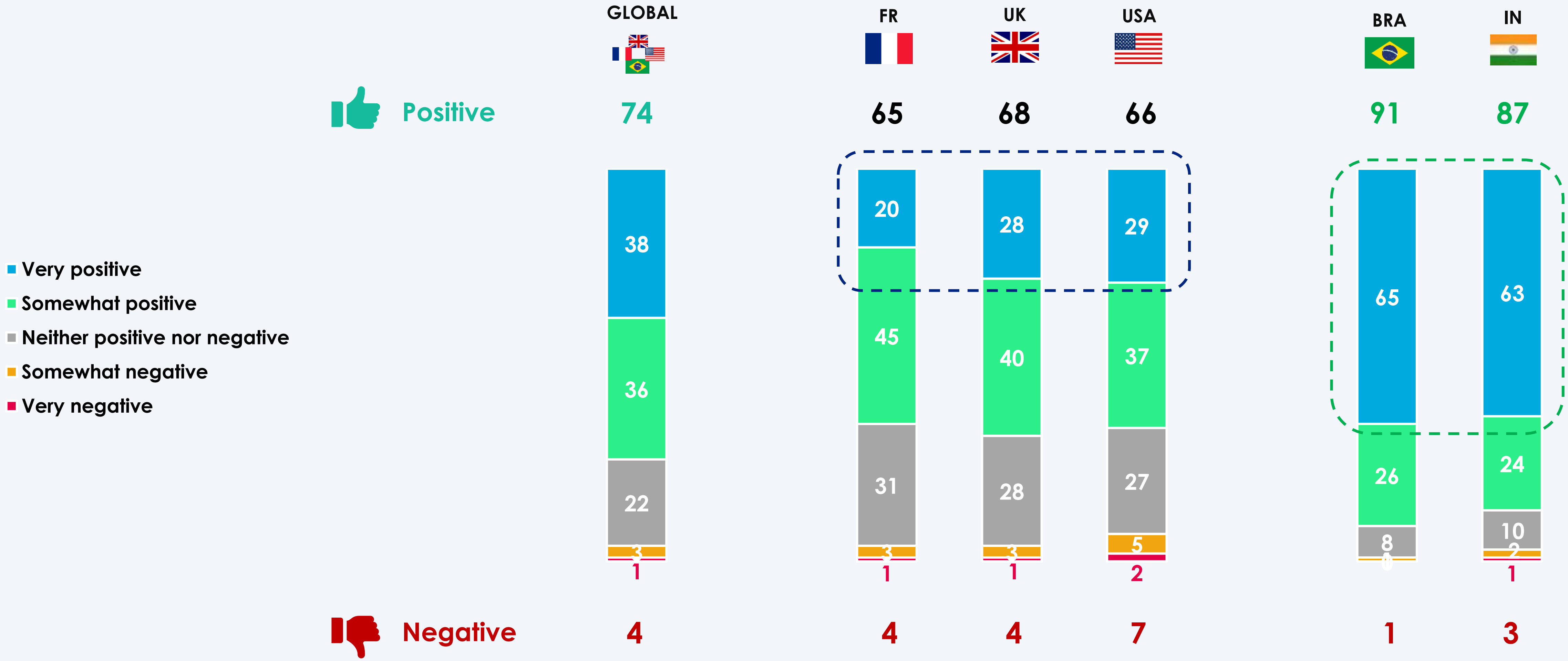
*Q6 - When shopping for groceries, what do you pay attention to first? (Five possible answers / First, second, third, fourth, fifth)*

# Despite this context, the perception of sustainable food is highly positive in all geographies

# SUSTAINABLE FOOD: POSITIVE OR NEGATIVE PERCEPTION

## A contrast between an extremely positive perception of sustainable food in “new world” countries vs. a more moderate enthusiasm in “old world/industrialized countries”

- To all – In %



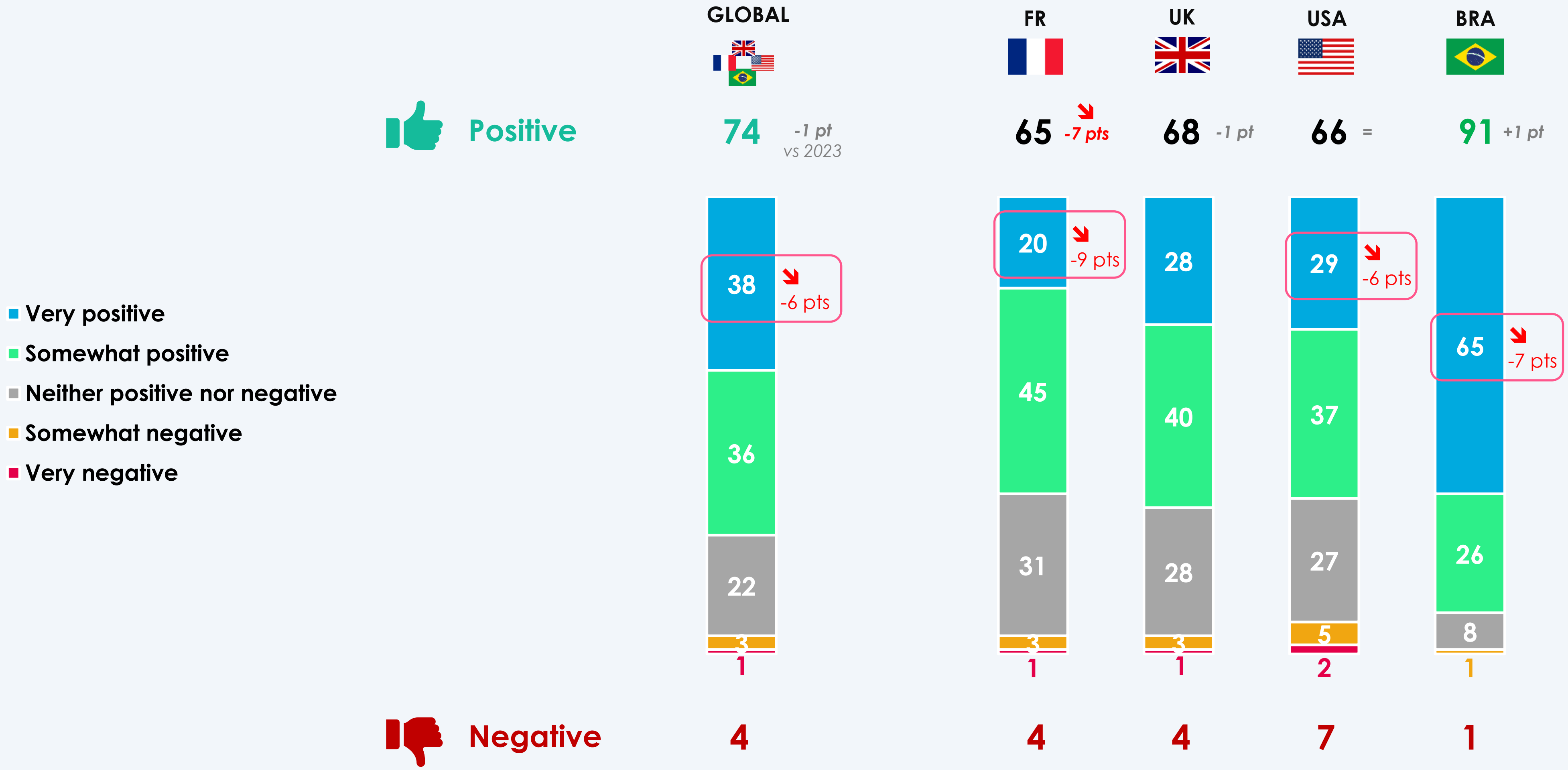



Q2 - Today, there is more and more talk about sustainable food. Does the expression "sustainable food" evoke for you something positive or negative?

# SUSTAINABLE FOOD: POSITIVE OR NEGATIVE PERCEPTION

## Less enthusiasm ("very positive") than 1 year ago across the board and particularly in France

- To all – In %



# Sustainable food: good for the environment, good for health and globally improves quality of life

# BENEFITS SPONTANEOUSLY ASSOCIATED WITH SUSTAINABLE FOOD

## Its benefits are widely recognized, with health and the environment at the top of the list

- To all – In %

### Main benefits

spontaneously associated with sustainable food

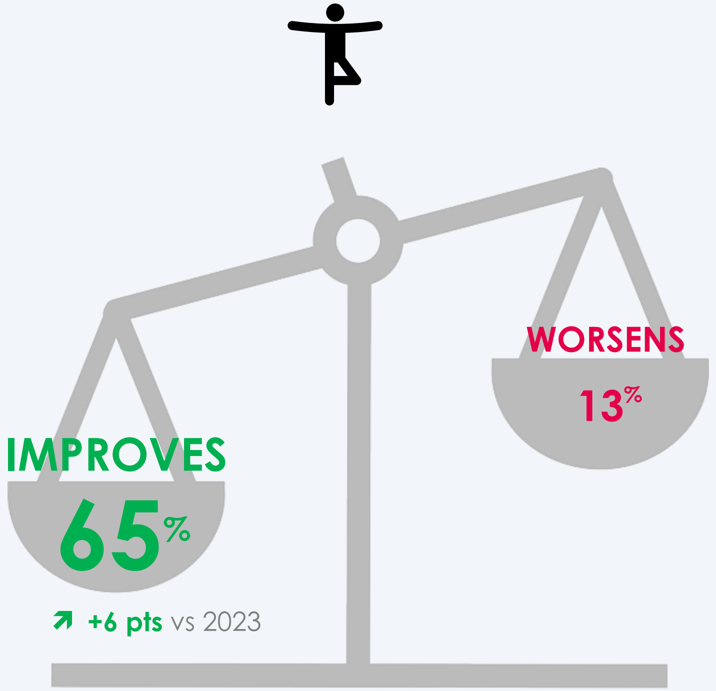
**Environment & Health**

| | | |
| --- | --- | --- |
| 1st/11 | 51 | **Reduce impact on the environment** |
| 2nd/11 | 50 | **Reduce waste** (+ USA) |
| 3rd/11 | 47 | **Improve your health** (through a healthier, more balanced diet) (+ BRA, + IN) |
| 4th/11 | 43 | **Protect biodiversity / Preserve natural resources** |

+ FR    + UK

*Other benefits: **support local producers / economies (38)**, **respect animal welfare (36)**, have a long-term food security (36), promote fair and equitable working conditions for farm workers (26), eat with pleasure (22), support and create jobs in the local environment (21), discover new tastes, new flavours, new products (21)*

### Sustainable food and quality of life




↗ +6 pts vs 2023

neither worsens nor improves

22%

# Reducing waste is seen as a major benefit in all countries, even if it is somewhat more emphasized by old-world countries

- To all – In %

**50%** **REDUCE WASTE**

**2nd** benefit spontaneously associated with sustainable food out of 11

**TOP 1 OR 2 IN OLD-WORLD COUNTRIES**

| FR | UK | USA |
|---|---|---|
| 2nd /11 | 2nd /11 | 1st /11 |

**TOP 4 IN NEW-WORLD COUNTRIES**

| BRA | IN |
|---|---|
| 4th /11 | 4th /11 |

QNEW1 - *What are, in your opinion, the five main benefits associated with sustainable food? Sustainable food must first and foremost enable to ..(Max 5 answers possible)*

# 2

# Different attitudes towards sustainable food, but similar engagement forces

# Three consumer families stand out when it comes to their willingness to consume sustainable products

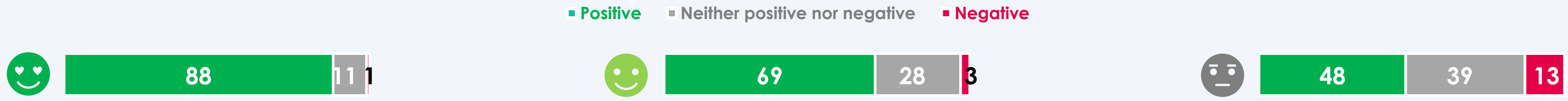
# 3 GROUPS OF CONSUMERS IN THEIR ATTITUDE TOWARDS SUSTAINABLE FOOD

**When it comes to relationships with sustainable food, 3 consumer families stand out**

## Willingness to consume sustainable products whenever possible

| Already do it | Could do it / hesitate to do it | Reject it |
|---|---|---|
| COMMITTED | INDECISIVE | DISTANT |
| 42% | 44% | 14% |

### Spontaneous perception of SF




### Main emotions towards SF

| | | |
|---|---|---|
| **Very positive** | **Positive but more divided** | **Mostly negative** |
| *Optimism / Enthusiasm / Delight* | *Optimism / Enthusiasm / Doubt* | *Doubt / Annoyance* |

# 3 GROUPS OF CONSUMERS IN THEIR ATTITUDE TOWARDS SUSTAINABLE FOOD

## Who are they?

| | COMMITTED | INDECISIVE | DISTANT |
|---|---|---|---|
| Share | 42% | 44% | 14% |
| France | 44 | 44 | 12 |
| UK | 34 | 45 | 21 |
| USA | 35 | 46 | 19 |
| Brazil | 51 | 42 | 7 |
| India | 60 * | 28 | 12 |
| Age | More people **aged 25 to 44** | Slightly more people **aged under 25** | No special features about age |
| € / PCS / Gender | Slighlty more **upper class** and **high income** | PCS Slightly more **inactive** | More **males** |
| Children / PCS € | More people **with children** | More people **without children** | PCS € No special features |
| Consumption | Consume **a large variety of products** (sustainable or not) | Consume **a reduced variety of products** | Consume **more processed food, fast food and seafood** |
| Practices | Already adopted **a lot of sustainable practices in their daily lives** as well as **regarding food waste** | Already adopted **only a few sustainable practices in their daily lives** as well as **regarding food waste** | Already adopted **only a very few sustainable practices in their daily lives** as well as **regarding food waste** |

* Indians lag behind on recycling practices but are very advanced when it comes to sustainable food

# 3 GROUPS OF CONSUMERS IN THEIR ATTITUDE TOWARDS SUSTAINABLE FOOD

## With regard to meat, very similar consumption habits between the 3 groups, more contrasts in their intention to reduce it in their diets

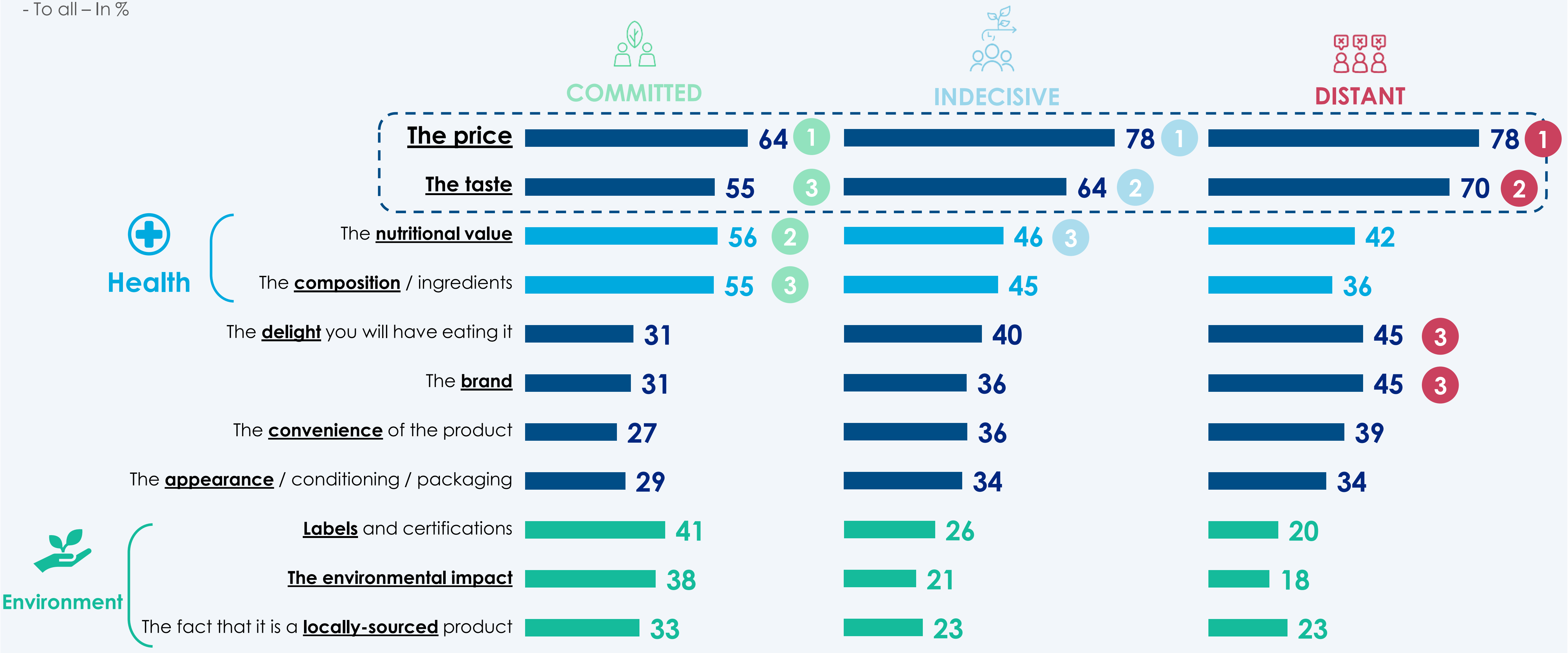
| | COMMITTED | INDECISIVE | DISTANT |
|---|---|---|---|
| **Consumption of red meat** – Few times a week | 51% | 52% | 57% |
| NO – Do not wish to reduce | 14% | 25% | 53% |
| **Consumption of non-red meat** – Few times a week | 62% | 65% | 65% |
| NO – Do not wish to reduce | 21% | 32% | 58% |

*Q7 - Today, on average, how often do you eat the following products?*

# While price is a key criterion for all, taste and health are discriminating factors for all groups

# Price and taste are the 2 most important criteria in choosing a food product for all 3 groups / Health aspects are also important for all (especially for Committed consumers)

- To all – In %




*Q6 - When shopping for groceries, what do you pay attention to first? (Five possible answers / First, second, third, fourth, fifth)*

# TRADE-OFF AMONG 3 GROUPS WHO CONSUME DIFFERENTLY

## It's on these 2 dimensions that all publics are least willing to make sacrifices plus the fact of breaking completely with their habits

- To all – In %

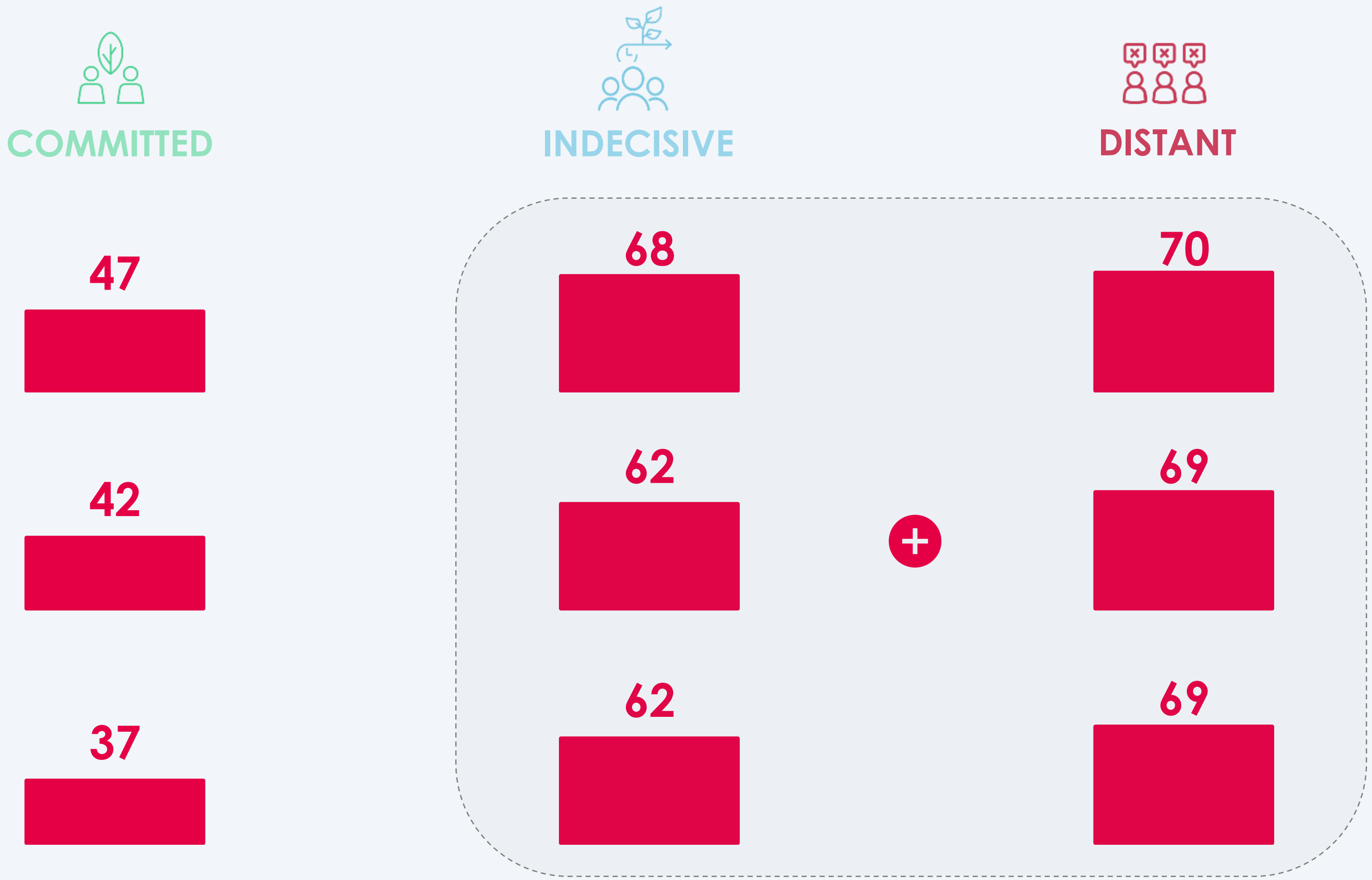
### Top 3 barriers to move toward sustainable food for the 3 groups

**Not ready to eat a sustainable dish / product if it is…**

**Less tasty** than an ordinary dish/product
TASTE → 2nd criteria for choosing food products

**Unusual**, more difficult to offer to guests

**More expensive** than an ordinary dish/product
PRICE → 1st criteria for choosing food products



# Despite their current differences in terms of habits they can be activated by the same levers

# POTENTIAL LEVERS TO CONSUME MORE OR SWITCH TO SUSTAINABLE PRODUCTS

## Common levers, top of the list for each group

- To all – In %

## Top 2 levers for both the committed and indecisive groups

| | COMMITTED | | INDECISIVE |
|---|---|---|---|
| **1 RECIPE IDEAS** using sustainable products | 47% | | 40% |
| France / UK / USA / Brazil / India | 39 / 41 / 45 / 55 / 39 | | 35 / 35 / 39 / 47 / 32 |
| **2 NUTRITIONAL INFORMATION** on the product / the dish | 46% | | 37% |
| France / UK / USA / Brazil / India | 36 / 50 / 46 / 50 / 54 | | 30 / 36 / 37 / 42 / 47 |

*QNEW4_2 - Here are a few concrete actions that could be implemented or systematized by players in the Food Services Industry (cooking and serving food out of home). Which do you think are the most likely to convince you and other more reluctant people to consume more sustainable products? (Several answers possible)*
*QNEW5_2 - Here are a few concrete actions that could be implemented or systematized by players in the Food Services Industry (cooking and serving food out of home). Which ones would encourage you to consume more sustainable products? (Several answers possible)*

# POTENTIAL LEVERS TO CONSUME MORE OR SWITCH TO SUSTAINABLE PRODUCTS

## Specific levers, more put forward by one group or another

- To all – In %

**Top 7 LEVERS**

**(11 tested elements)**

***Reminder***: *Recipe ideas and Nutrional information are the 1st and 2nd levers for both groups*

| | COMMITTED | INDECISIVE |
|---|---|---|
| 3 | + Sustainable practices within the place you buy the product / the dish | Labels and certifications |
| 4 | Labels and certifications | A large choice of unusual sustainable dishes that you don't eat frequently at home |
| 5 | A large choice of unusual sustainable dishes that you don't eat frequently at home | A loyalty program / incentives linked to sustainable choices |
| 6 | A loyalty program / incentives linked to sustainable choices | The assurance that leftovers are donated to charities or food banks + |
| 7 | + Guarantees about the suppliers | Sustainable practices within the place you buy the product / the dish - |

*QNEW4_2 - Here are a few concrete actions that could be implemented or systematized by players in the Food Services Industry (cooking and serving food out of home). Which do you think are the most likely to convince you and other more reluctant people to consume more sustainable products? (Several answers possible)*
*QNEW5_2 - Here are a few concrete actions that could be implemented or systematized by players in the Food Services Industry (cooking and serving food out of home). Which ones would encourage you to consume more sustainable products? (Several answers possible)*

# 3

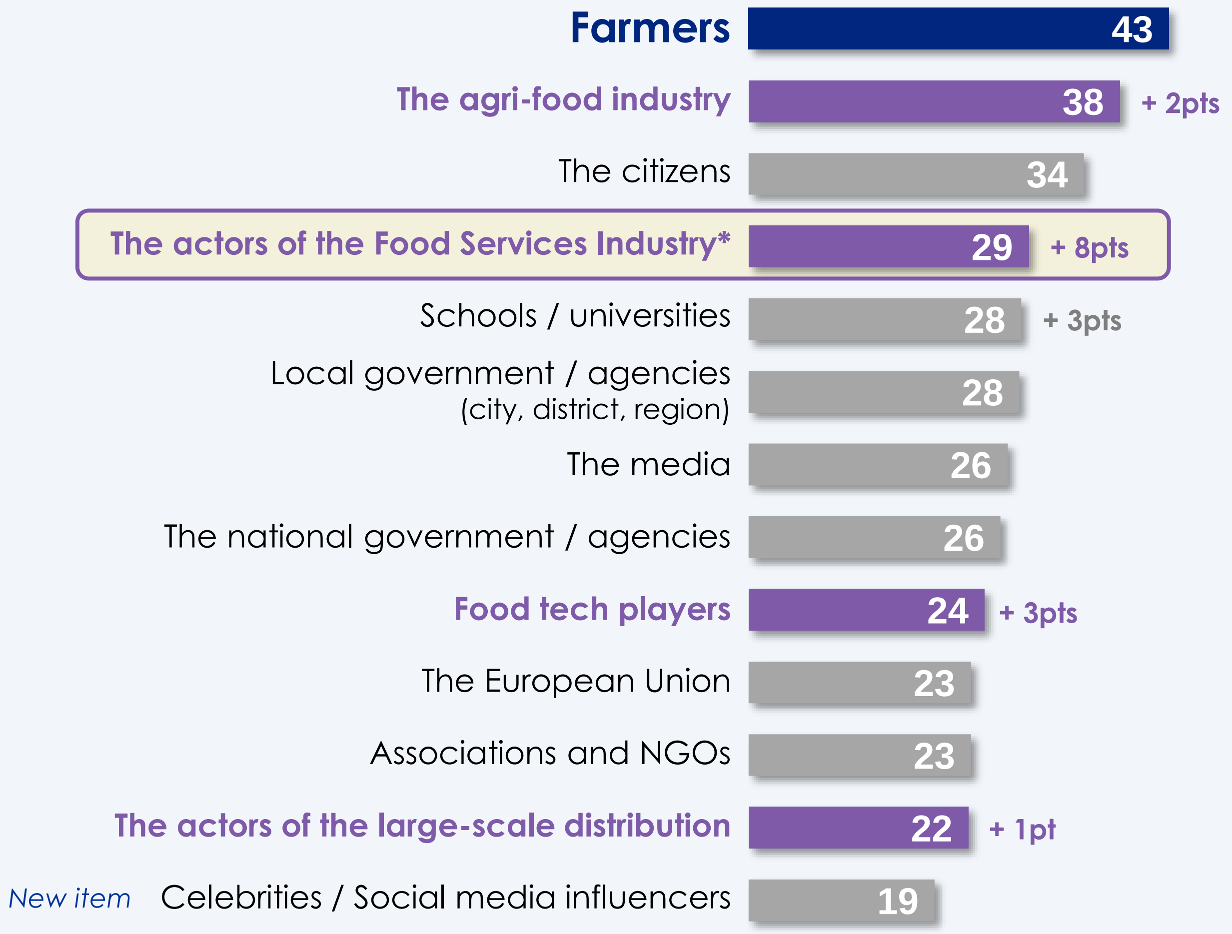
# The Food Services Industry, much-awaited to encourage change and answer to consumer expectations

# Alongside farmers and the agri-food sector, the Food Services industry is eagerly awaited to help moving toward

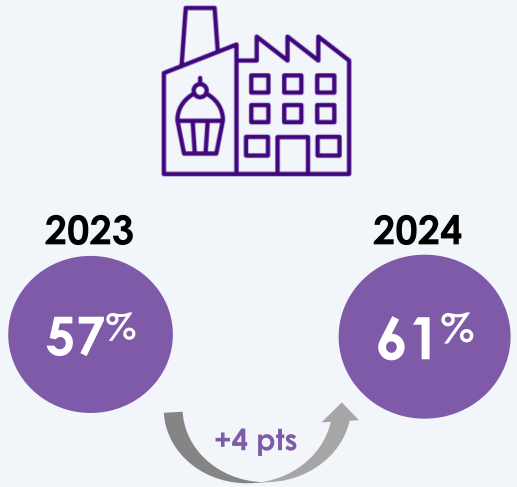
## STAKEHOLDERS MOST LIKELY TO INFLUENCE THE TRANSITION TO A MORE SUSTAINABLE DIET

**Farmers and producers at the heart of the transition's expectations and drivers, with the foodservice sector**

- To all – In %




Total
**Players in the industrial /agri-food ecosystem**




*Item used to be "The actors of the catering industry" in wave 1



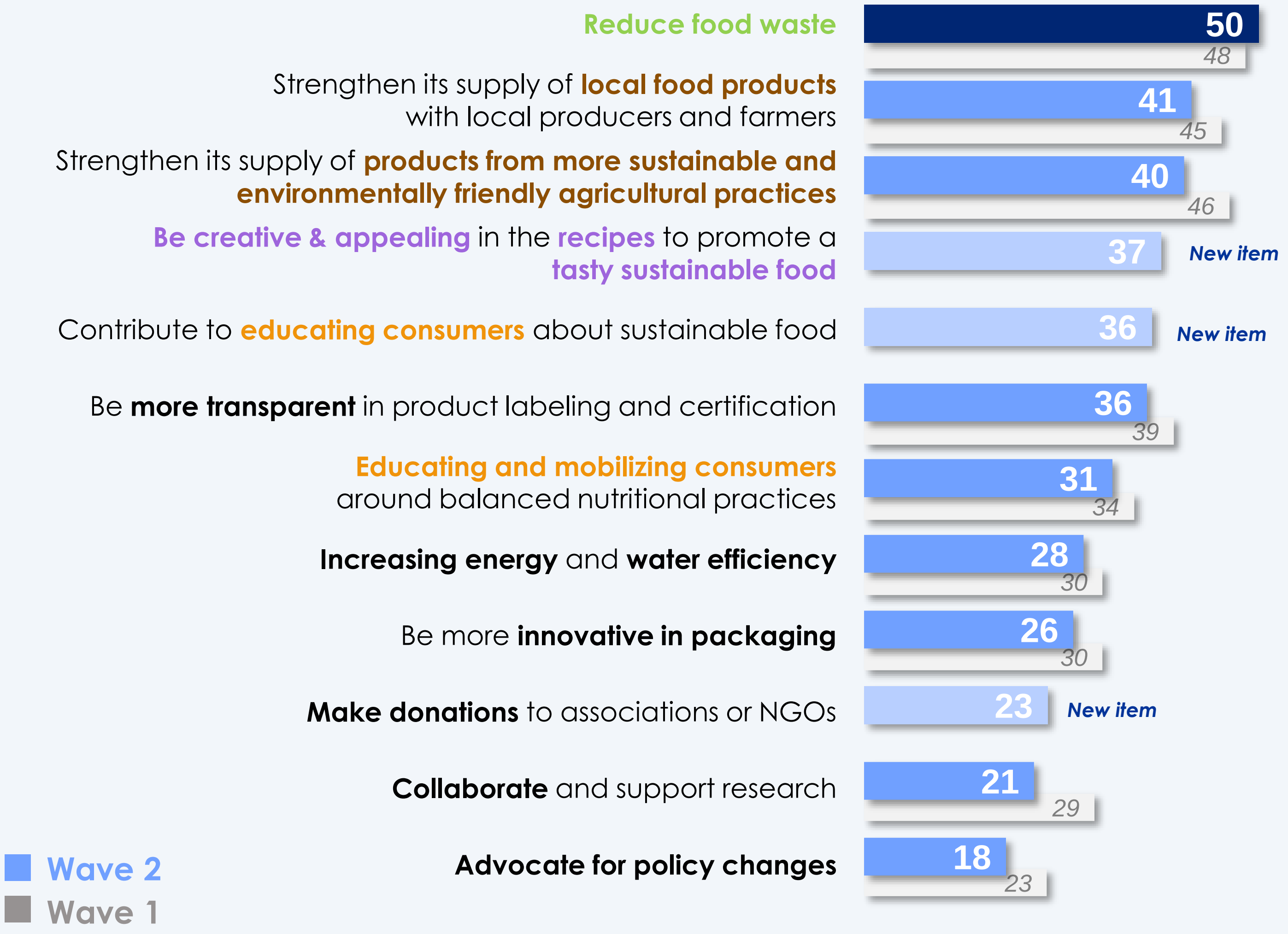
*Q12 - According to you, which actors are helpful in moving us towards a more sustainable food? (Several answers possible)*

# To meet these expectations, out-of-home food services can build on four pillars

# EXPECTATIONS TOWARDS THE MAJOR PLAYERS IN THE FOOD SERVICES INDUSTRY

## Expectations towards out of home food services based on 4 pillars

- To all – In %




**4 pillars**

**Ecologically virtuous practices**

*Food waste reduction is the only aspect to rise compared with 2023*

**Sustainable/responsible production methods**

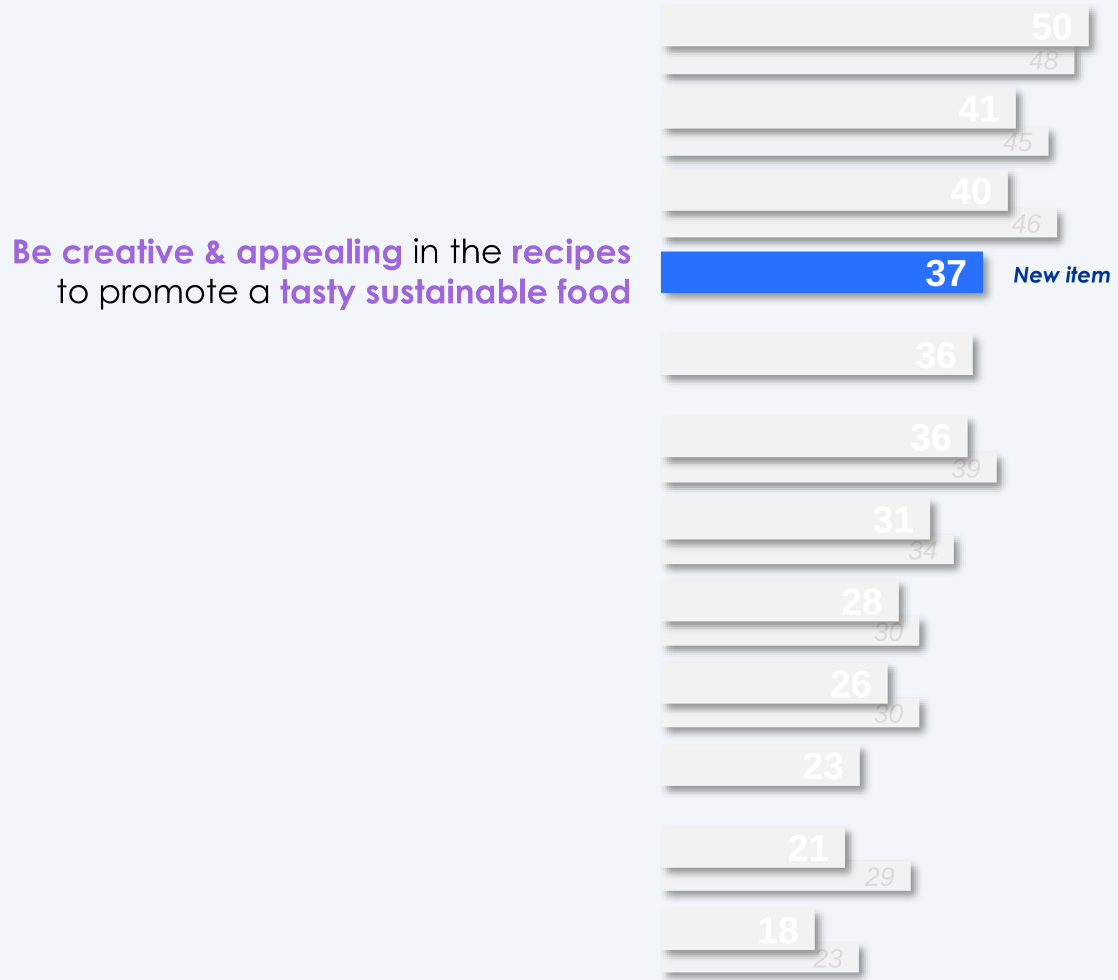
**Innovation (recipes) without loss of taste**

**Pedagogy/education**

*Q21 - When you think about the players in the Food Services Industry (cooking and serving food out of home), what are the priority actions they should implement to promote a more sustainable way of eating? (Several answers possible)*

# ZOOM ON INNOVATION PILLAR

- To all – In %




**Innovation (recipes) without losing taste**

***Chefs play a key role in reintroducing the notion of delight alongside sustainability***

*Q21 - When you think about the players in the Food Services Industry (cooking and serving food out of home), what are the priority actions they should implement to promote a more sustainable way of eating? (Several answers possible)*

# This creativity can be demonstrated in the various "out-of-home" venues, where intentions to consume more sustainably are all in the majority (with the exception of sporting/cultural events)

- To all – In %

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

| Place | Wishing to eat more sustainable products than at home | Not wishing to eat more sustainable products than at home |
|---|---|---|
| *For parents* School / University | 62 | 38 |
| Restaurant | 62 | 38 |
| *For students* School / University | 58 | 42 |
| Health establishments | 58 | 42 |
| Company cafeteria | 57 | 43 |
| Sporting / Cultural event | 49 | 51 |

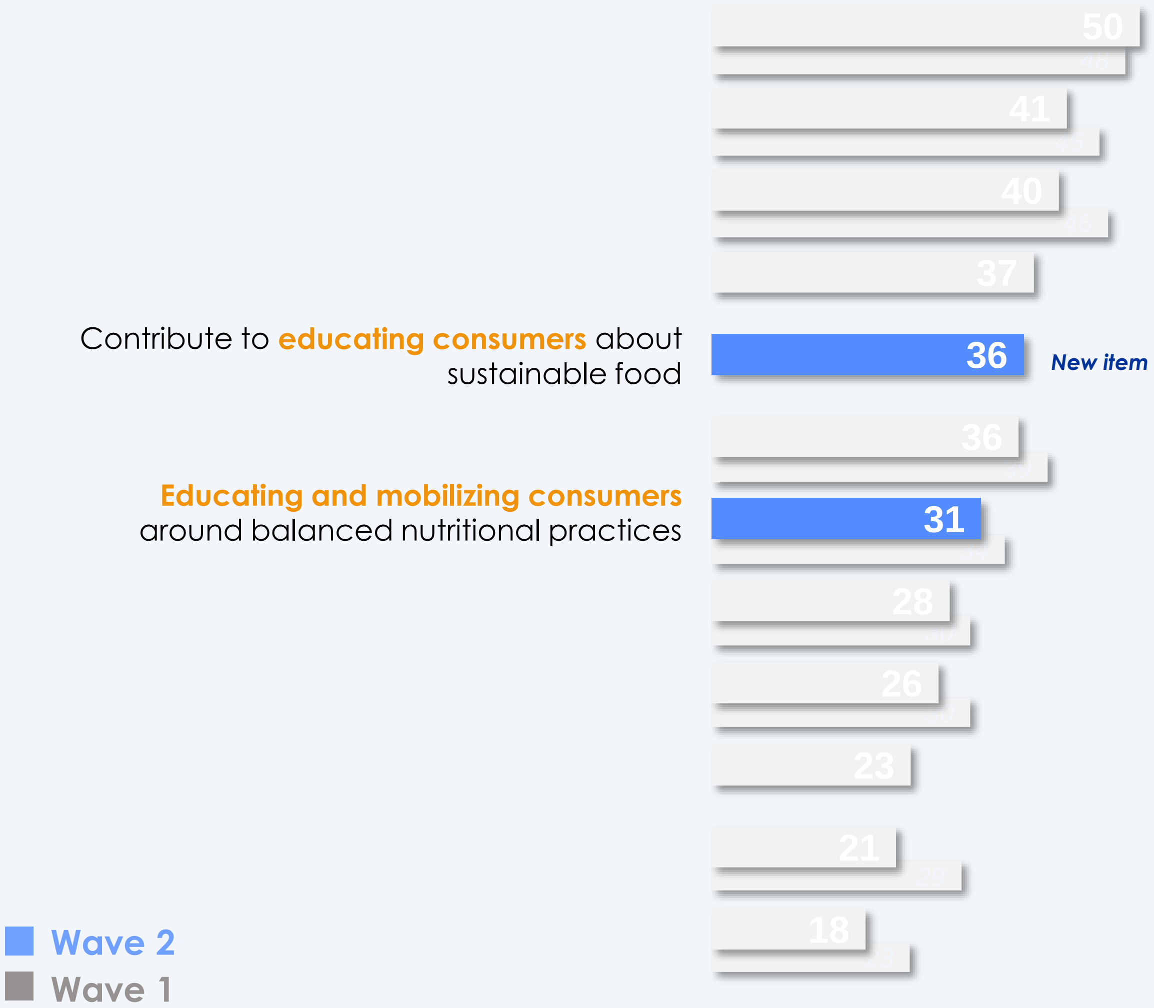
**Proportion of the population not wishing to eat more sustainable products than at home, by place**

- + Emerging countries (Brazil and India) with a stronger desire to eat more sustainable products than at home
- − English-speaking countries (UK, US) below the average for most locations
- − France joining them this year with lower scores in most places

Q9 - *When you eat at the following places, compared to what you usually eat at home, would you say you look more for sustainable products or dishes?*

# ZOOM ON PEDAGOGY/EDUCATION PILLAR

- To all – In %




**Pedagogy/Education**

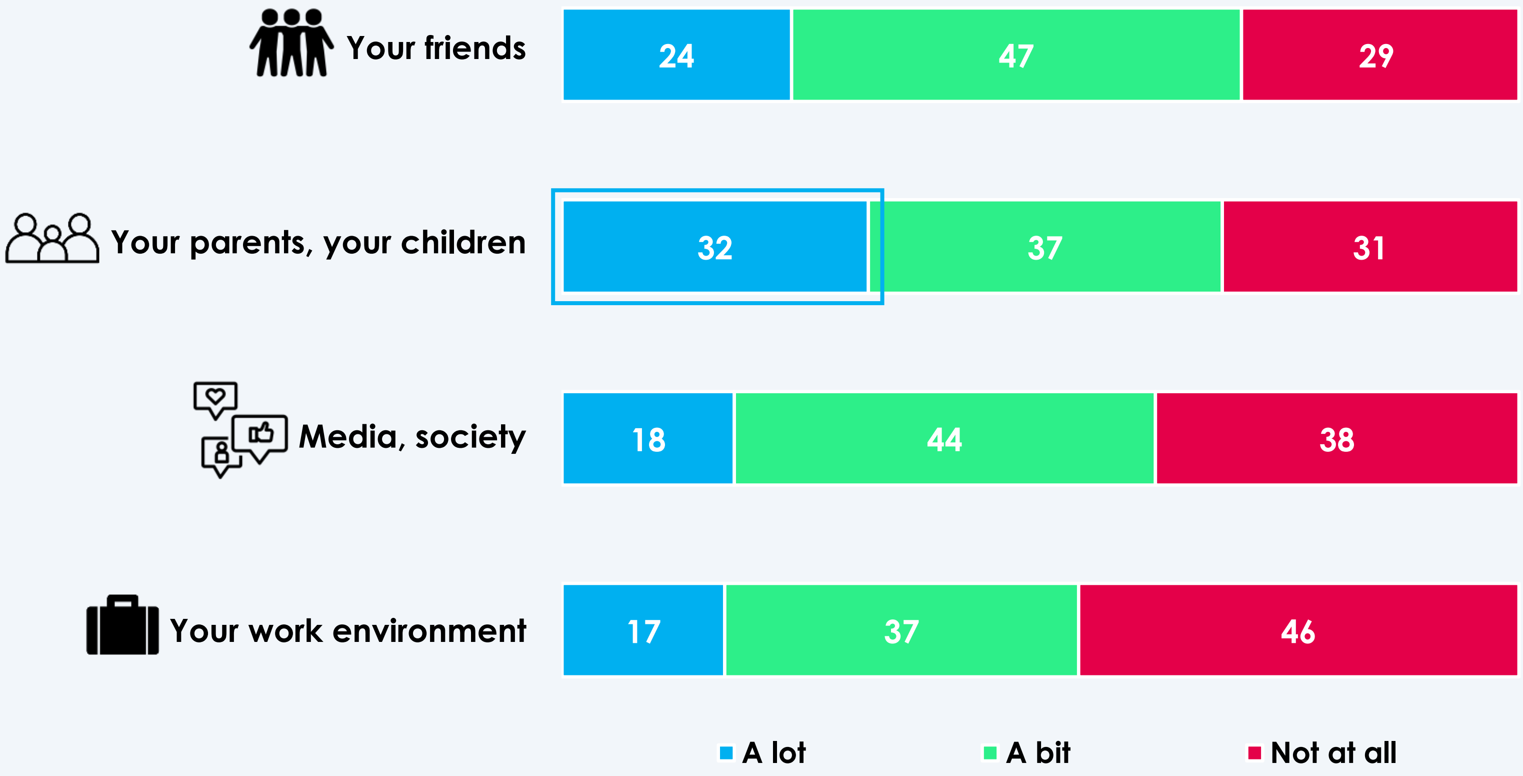
***By sponsoring responsible, healthy food products that contribute to a positive impact on public health and the environment***

*Q21 - When you think about the players in the Food Services Industry (cooking and serving food out of home), what are the priority actions they should implement to promote a more sustainable way of eating? (Several answers possible)*

ZOOM ON PEDAGOGY/EDUCATION PILLAR

# Family and friends appear to be key partners with the objective of educating

- To those who already consume / could / won't consume sustainable food products whenever possible – In %




| | Total Influenced | Committed | Pragmatics | Distants |
|---|---|---|---|---|
| Your friends | 71 | 76 | 74 | 44 |
| Your parents, your children | 69 | 75 | 72 | 43 |
| Media, society | 62 | 69 | 62 | 41 |
| Your work environment | 54 | 59 | 54 | 36 |

+ BRA + IN

Emerging countries (Brazil and India) more likely to be influenced by all sources

*QNEW4_3 / QNEW5_3 / QNEW6_3*
*And to what extent could you be influenced by the following sources of influence in your choice to consume sustainable products?*
*And to what extent are you influenced by the following sources of influence in the fact that you are unwilling to consume sustainable products?*

# By highlighting SF benefits pedagogy and education could help to clear up doubts and reinforce enthusiasm

- To all – In %

## Negative emotions most felt when considering a more sustainable way of eating


**1st/6** **negative emotion felt globally far ahead of anxiety** (13%)

**1st/6** **negative emotion felt in all countries** (**except in India** – anxiety is 1st) **and in all generation** (++ 60 y.o. or more)



*Q3. When you hear or think about adopting a more sustainable diet, what emotions do you feel the most? (5 answers possible)*

# 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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