



MORNING CONSULT®



IBM EUROPE FOOD SUSTAINABILITY STUDY – OVERALL TRENDED REPORT

DECEMBER 3 - 4, 2020

KEY FINDINGS

1. **High prices are still the greatest barrier holding Europeans from eating more responsibly sourced food in 2020**, but Europeans were slightly less likely to select each obstacle as a reason they are not eating more responsibly sourced food in 2020 compared to 2019.
2. Europeans in 2020 find **fair treatment and payment to food producers/farmers (30%) and healthier/more nutritious (32%)** slightly more compelling reasons to eat and/or buy more sustainable food than in 2019.
3. In 2020, Europeans are more excited about **locally grown or sourced food (39%) and fair treatment and payment to producers (30%)** than in 2019.
4. European respondents are slightly more concerned about food waste in 2020 (**82%**) compared to 2019 (**79%**) and Spanish respondents remain the most concerned about food waste (90%).
5. There was a 5-point increase in 2020 of Europeans saying it would be very valuable to be able to learn information about the farmers that grow their food (**44%**) compared to 2019 (39%).
6. Europeans were slightly more likely to say it is valuable that their food be traceable on the blockchain in 2020 (**83%**), but a majority of Europeans in both 2019 and 2020 reported it would be valuable to have food be traceable on the blockchain to trace food-borne illness and recalls.
7. There was an 11-point increase in Europe overall and across the studied countries of respondents reporting **environmental sustainability is a very large or somewhat large factor when it comes to purchasing their Christmas dinner or other festive meal essentials (70%)**.

Methodology: This study was conducted by Morning Consult on behalf of IBM from December 3-4, 2020. The study was conducted among 998 U.K. adults, 1,475 Spanish adults, and 988 Italian adults. A previous version of this study was conducted from November 14-18, 2019 among 2,193 U.K. adults, 2,183 Spanish adults, and 1,989 Italian adults. The studies were conducted online and the data were stratified to match a target sample of adults in each country on age and gender, then weighted based on age, gender, race, and education level.

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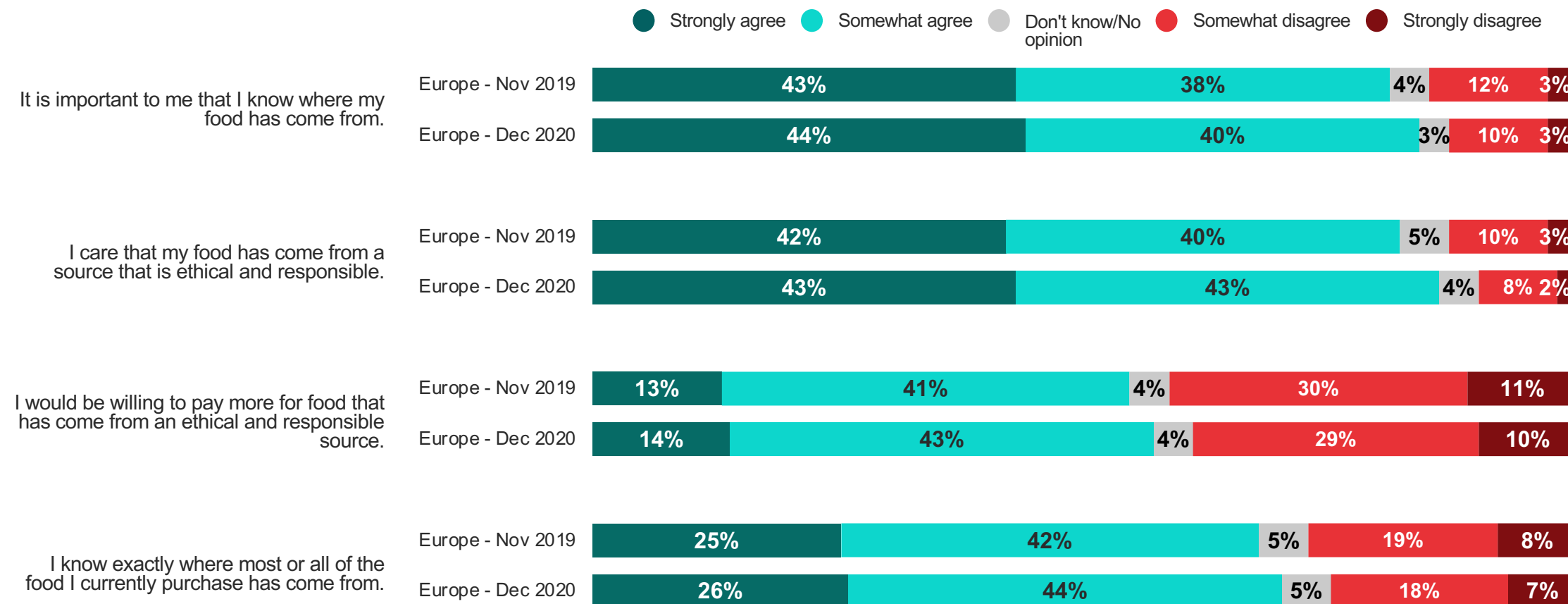
CONCERNS WITH FOOD
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GENERAL ATTITUDES TOWARDS FOOD RESPONSIBILITY

Europeans in 2020 are slightly more likely to agree with each statement; over four in five still agree it is important to know where their food has come from and care that their food has come from a source that is ethical and responsible

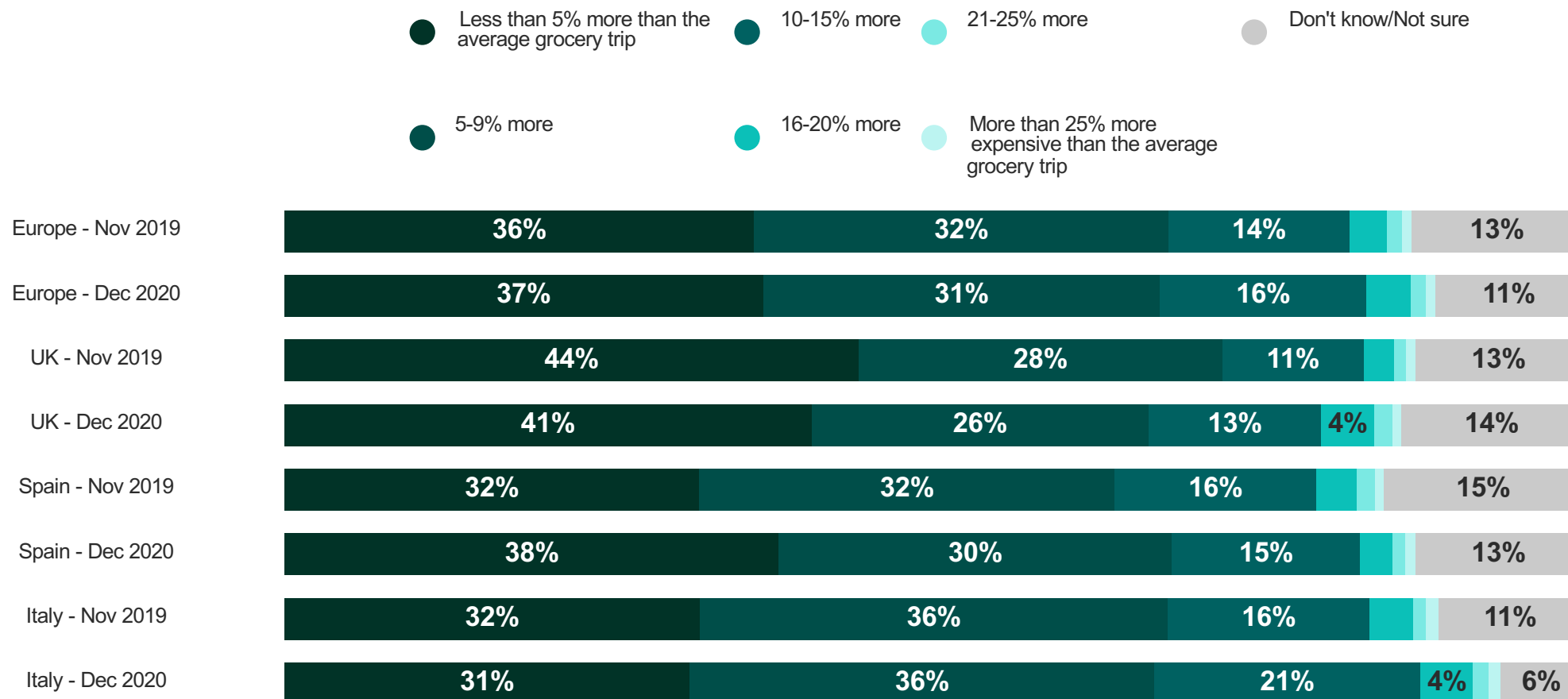
How far do you agree or disagree with the following statements?



GENERAL ATTITUDES TOWARDS FOOD RESPONSIBILITY

Europeans' willingness to pay more for sustainably sourced food is largely unchanged or has slightly decreased in some studied countries, such as Spain and the UK

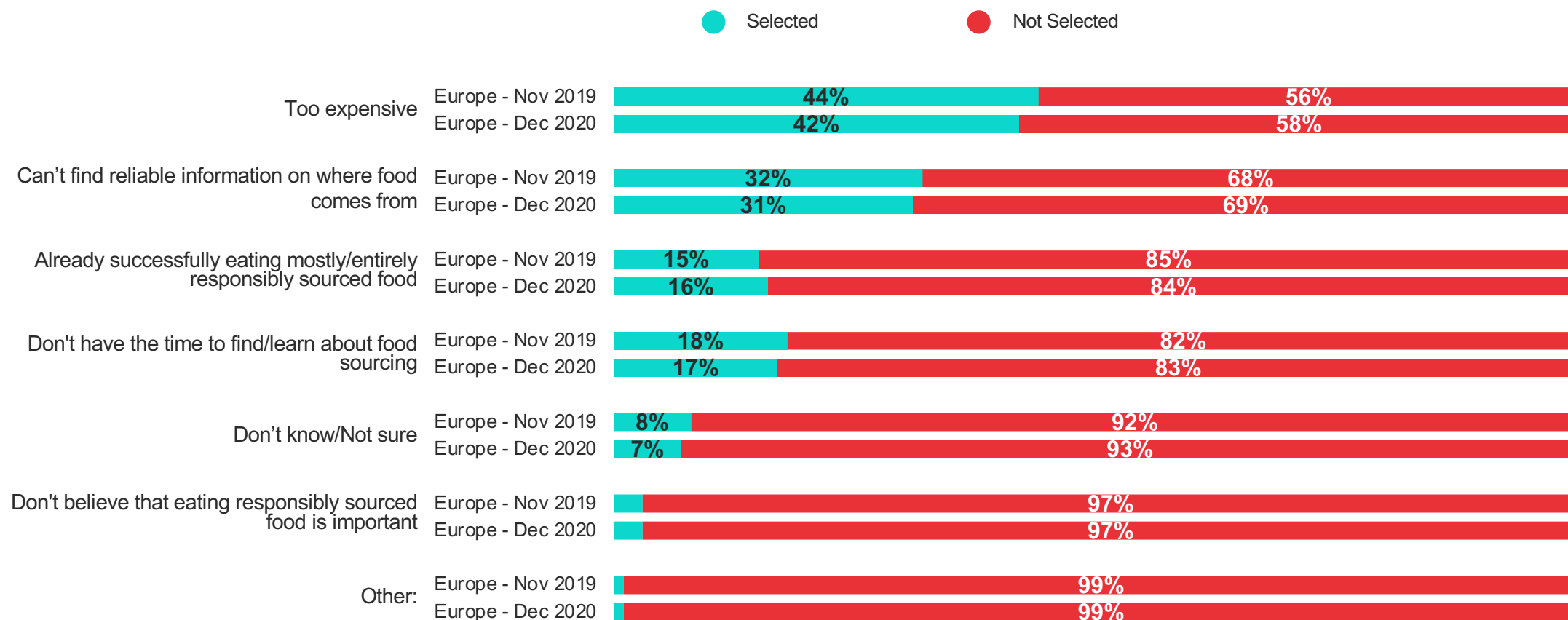
You mentioned you agree that you would be willing to pay more for food that has come from a sustainable source. Compared to your average grocery shop, how much more would you be willing to pay if you could guarantee that your food was coming from a sustainable source?



GENERAL ATTITUDES TOWARDS FOOD RESPONSIBILITY

In both 2019 and 2020, high prices were the greatest barrier holding Europeans back from eating more responsibly, but Europeans were less likely to cite any barriers to eating more responsibly sourced food in 2020

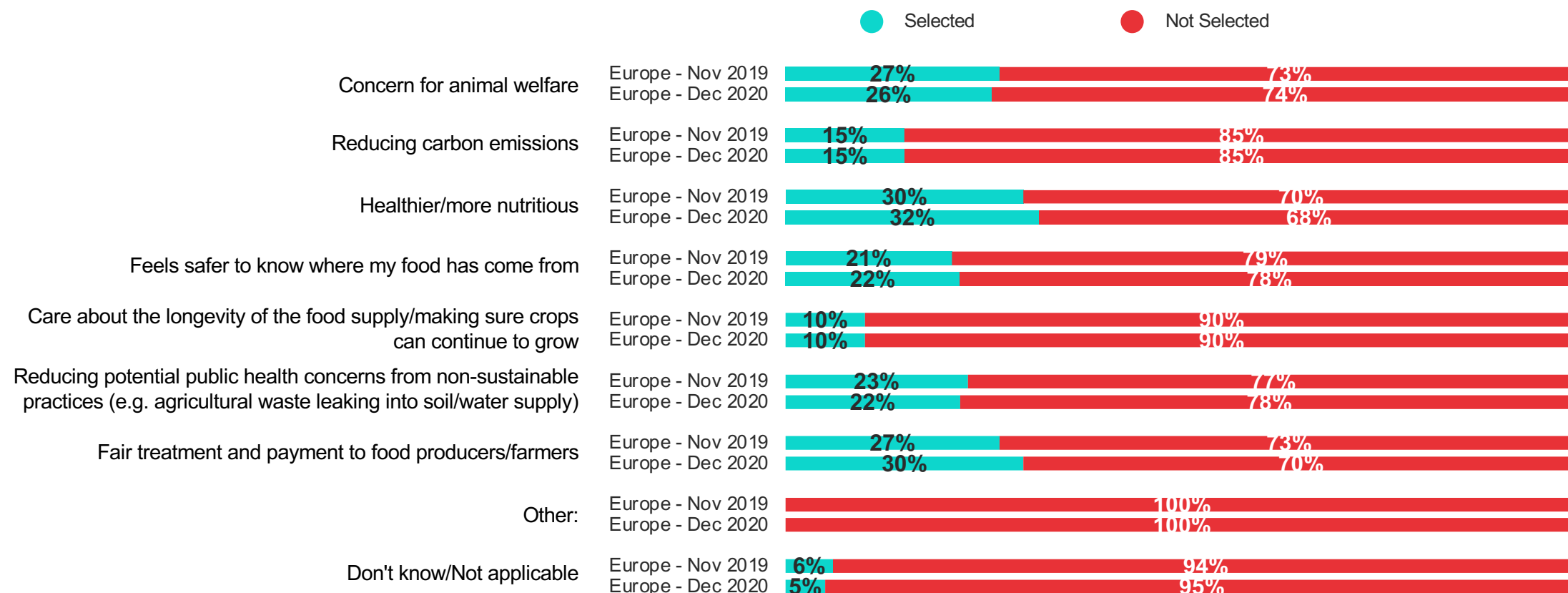
What, if anything, is holding you back from eating more responsibly sourced food? Select all that apply.



GENERAL ATTITUDES TOWARDS FOOD RESPONSIBILITY

Europeans in 2020 found fair treatment and payment to food producers/farmers (+3) and healthier/more nutritious (+2) slightly more compelling reasons to eat and/or buy more sustainable food

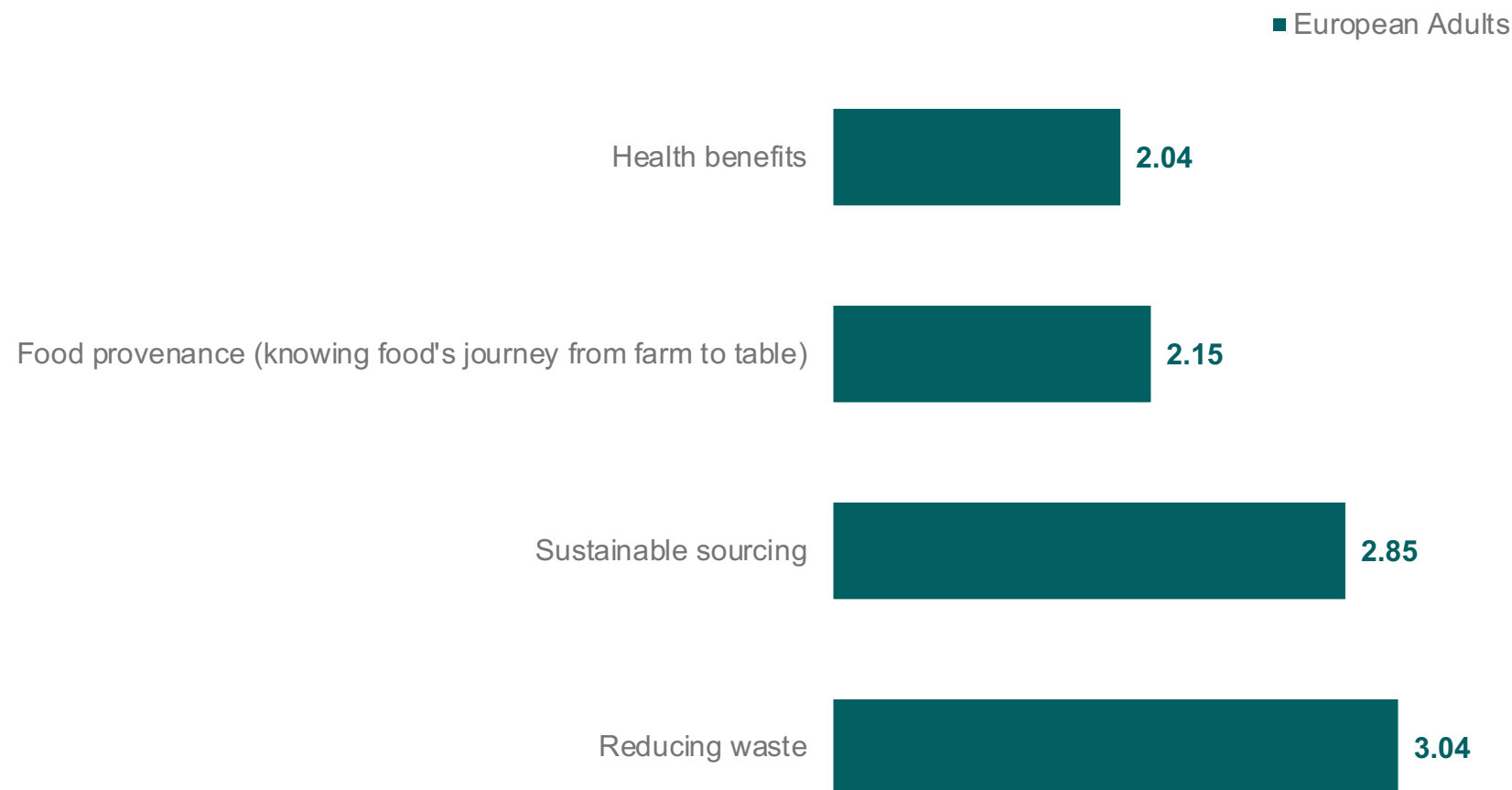
What reasons do you find most compelling when it comes to the decision to eat and/or buy more sustainable food? Select no more than two.



GENERAL ATTITUDES TOWARDS FOOD RESPONSIBILITY

Europeans ranked health benefits as most important followed closely by food provenance

Rank these in order of what would you consider most important when it comes to food: **[Average Rank]**



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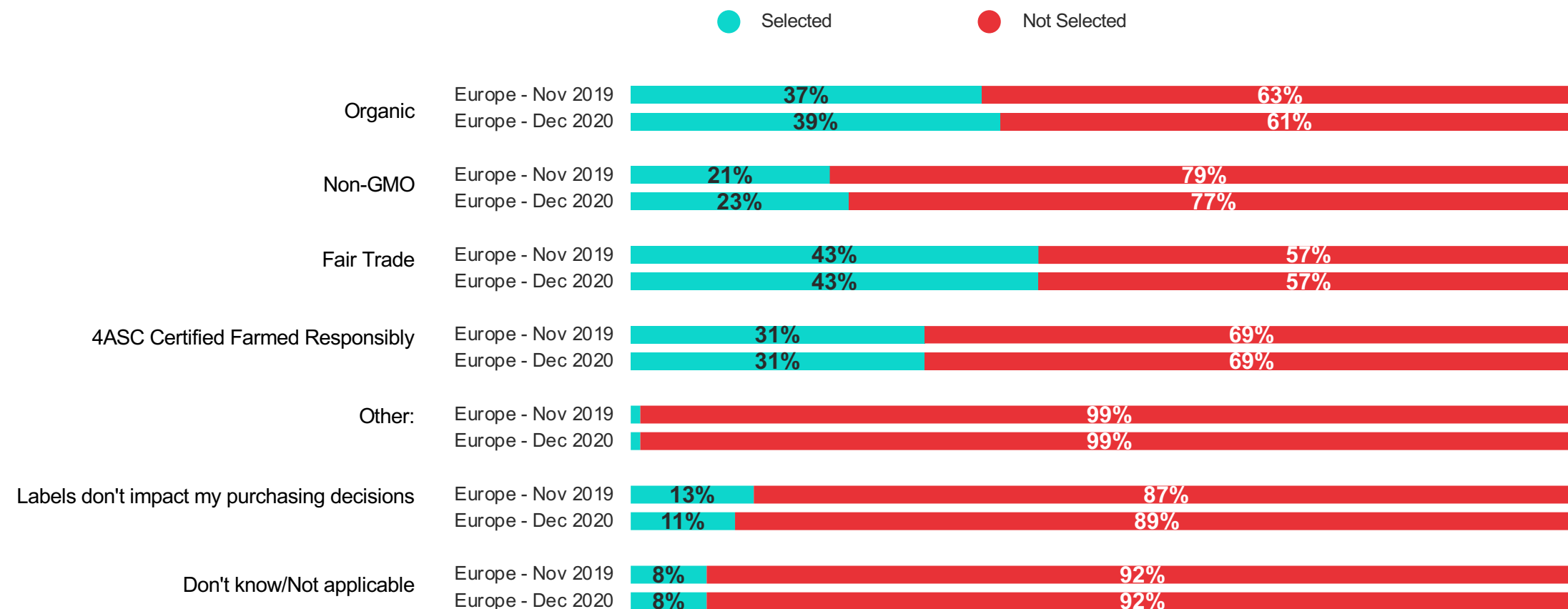
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FOOD LABELING AND PRODUCT PREFERENCES

Fair Trade is still the most selected label that would make Europeans more likely to purchase a food item in a grocery store and remains unchanged from 2019; Europeans are slightly more likely to say organic (+2) and Non-GMO (+2) labels would make them more likely to purchase a food item in 2020

Which of the following labels, if you saw it on a food item in the grocery store, would make you more likely to purchase that item?
Select all that apply.



FOOD LABELING AND PRODUCT PREFERENCES

Across all categories of food, Europeans in 2020 care about information regarding responsible and ethical production at the same levels as 2019; Europeans still care most about information regarding responsible and ethical production of meat (+2), followed by vegetables (+1), fruit (+1), and dairy (+1)

What categories of food do you most care about information regarding responsible and ethical production? Select all that apply.



FOOD LABELING AND PRODUCT PREFERENCES

Across all categories of food, Europeans in 2020 care about information regarding provenance at the same levels as 2019; Europeans still care most about information regarding provenance of meat (+2), followed by vegetables (+1), fruit (+3), and dairy

What categories of food do you most care about information regarding provenance (where the food originated)? Select all that apply.



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INTEREST IN FOOD INNOVATIONS

Europeans in 2020 are more excited about locally grown or sourced food (+3) and fair treatment to payment to producers (+5) compared to 2019

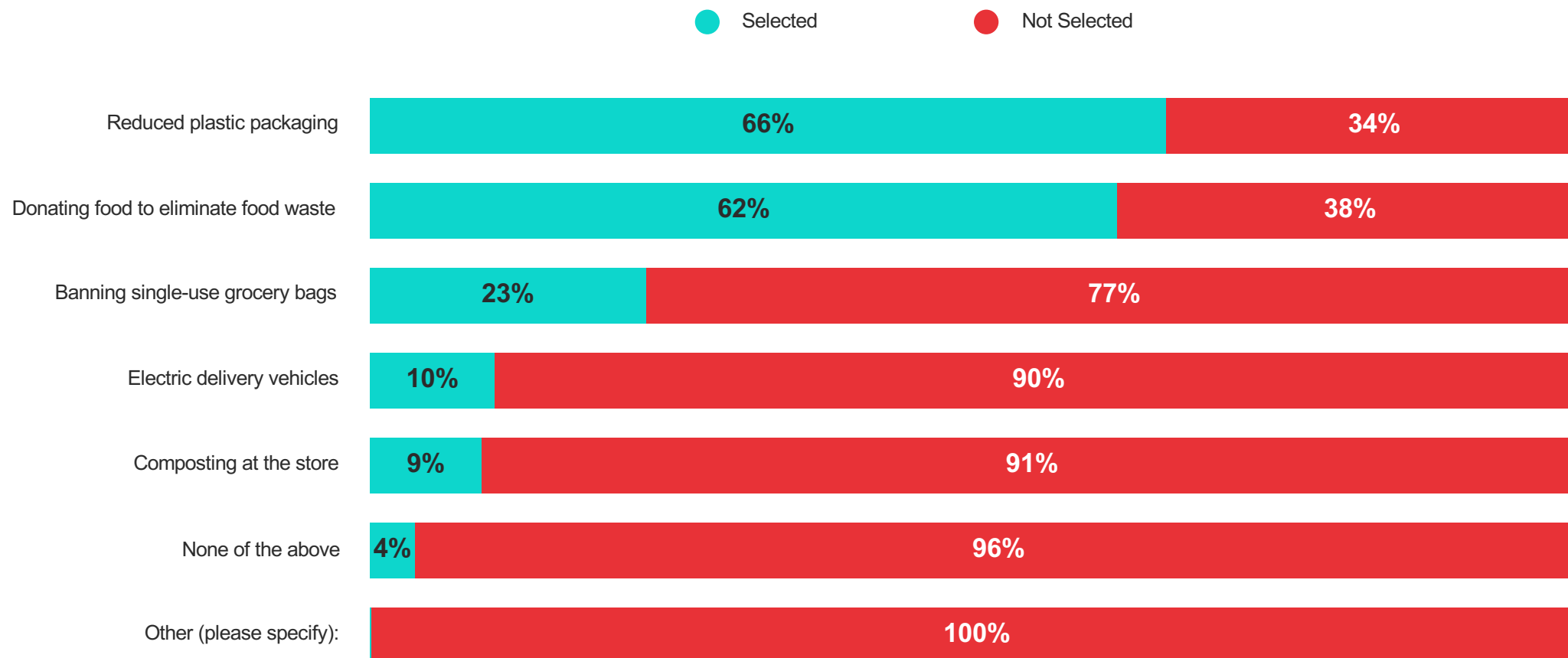
Which of these innovations are you most excited about when it comes to food production? Select no more than two.



INTEREST IN FOOD INNOVATIONS

A majority of Europeans are most excited about retailers reducing plastic packaging (66%) and donating food to eliminate food waste (62%)

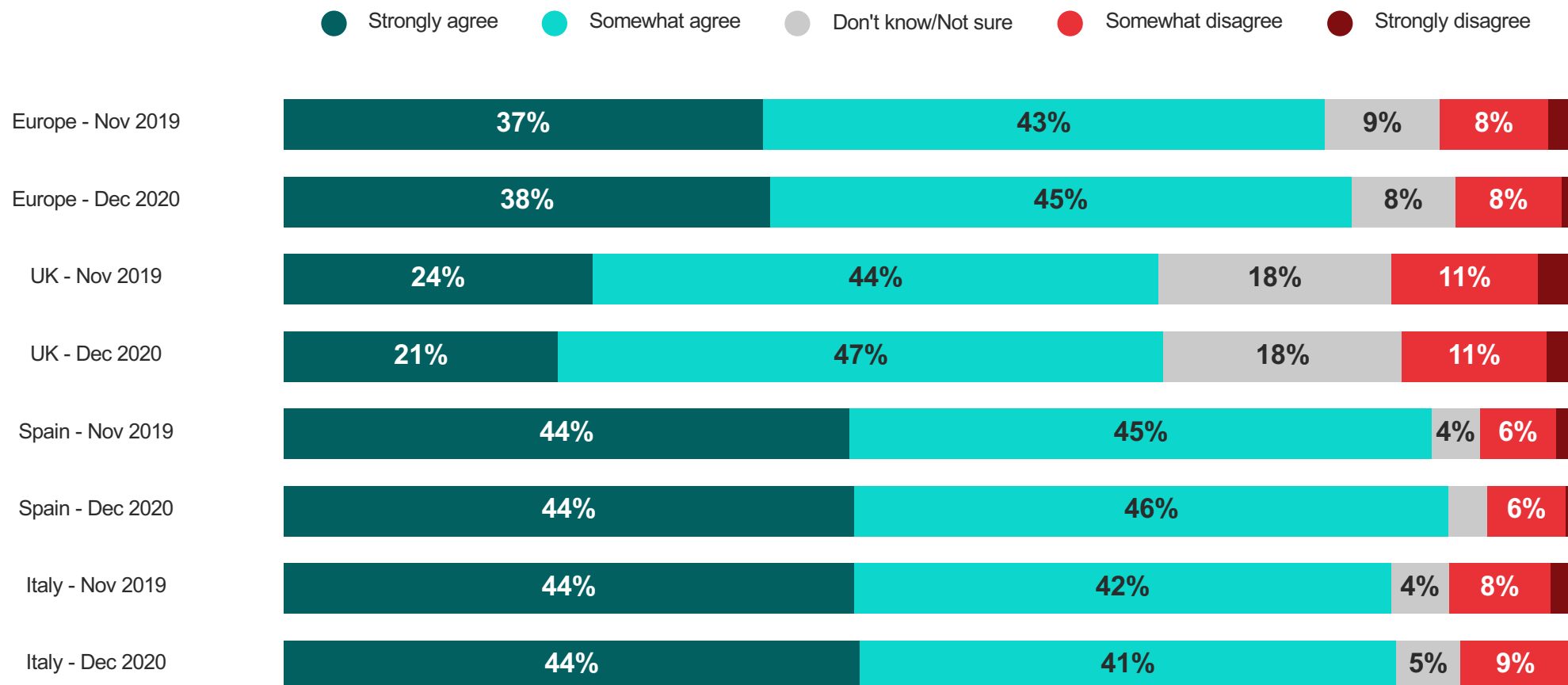
Which of these innovations are you most excited about retailers doing? Select no more than two.



INTEREST IN FOOD INNOVATIONS

A majority of respondents in Europe and across the studied countries agree they would like supermarkets to respond faster to the latest consumer food trends in 2019 and 2020

How far do you agree or disagree with the following statement?: I would like supermarkets to respond faster to the latest consumer food trends.



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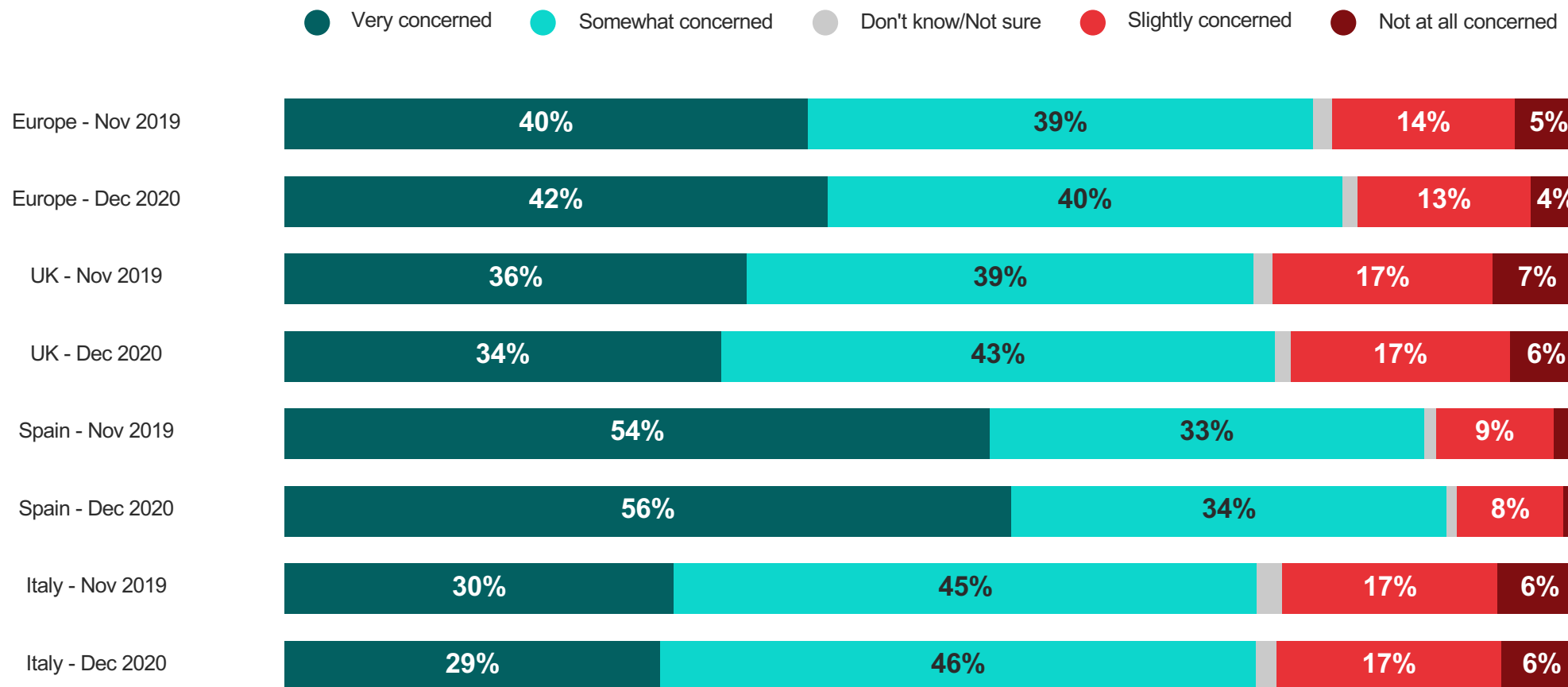
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CONCERNS WITH FOOD WASTE

European respondents are slightly more concerned about food waste in 2020 compared to 2019 and Spanish respondents remain the most concerned about food waste

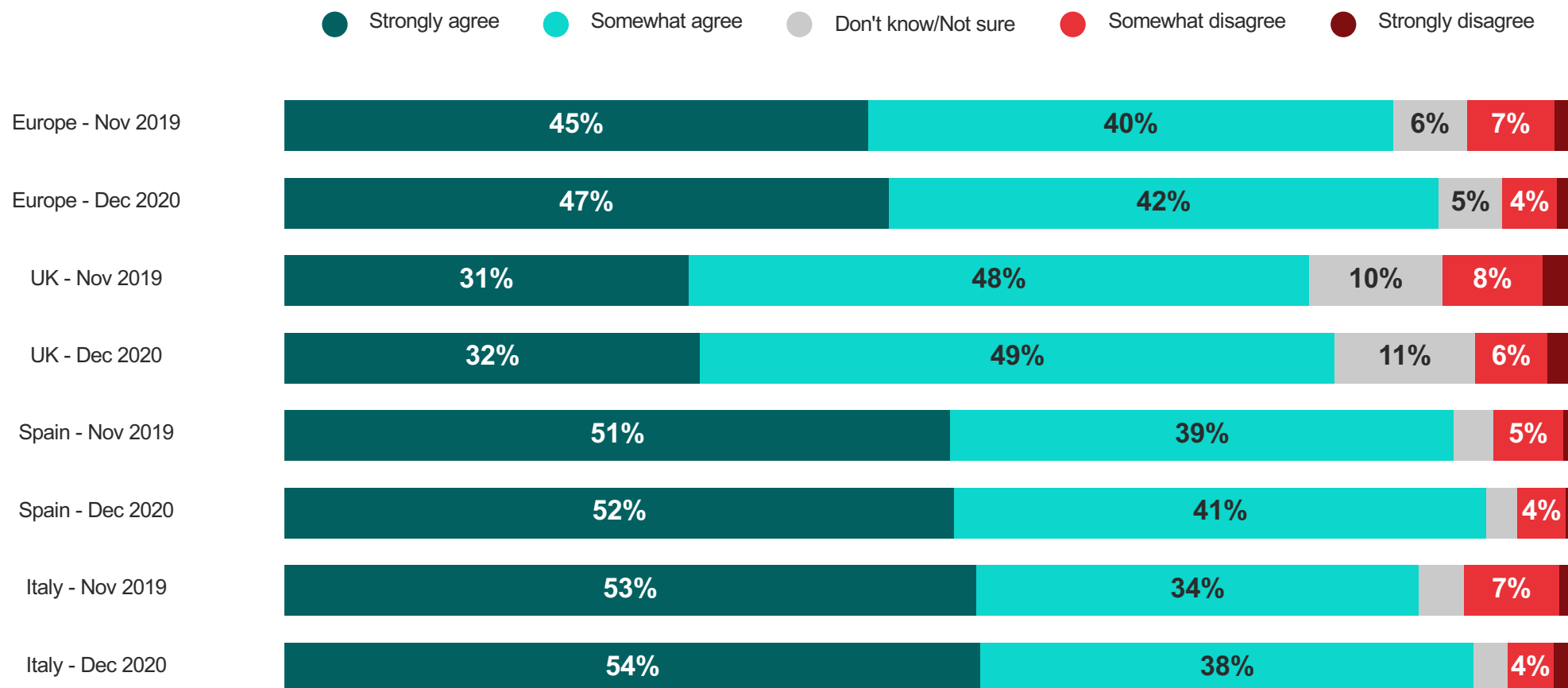
How concerned are you about food waste?



CONCERNS WITH FOOD WASTE

A majority of respondents in Europe and across the studied countries agree they would be more willing to shop at a supermarket brand with initiatives to reduce food waste in 2019 and 2020

How far do you agree or disagree with the following statement?: I would be more willing to shop at a supermarket brand with initiatives to reduce food waste.



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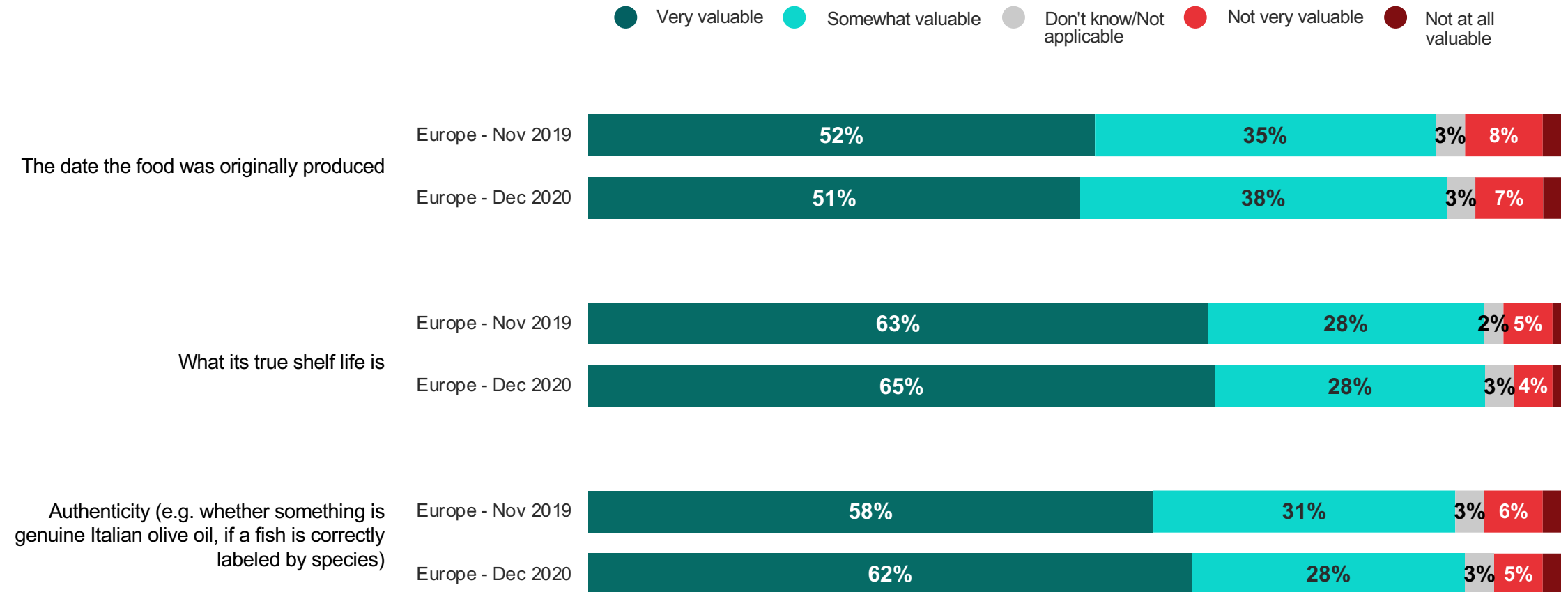
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European respondents' opinions about types of information that would be valuable to have about food remain unchanged in 2020; true shelf life is still considered the most valuable piece of information

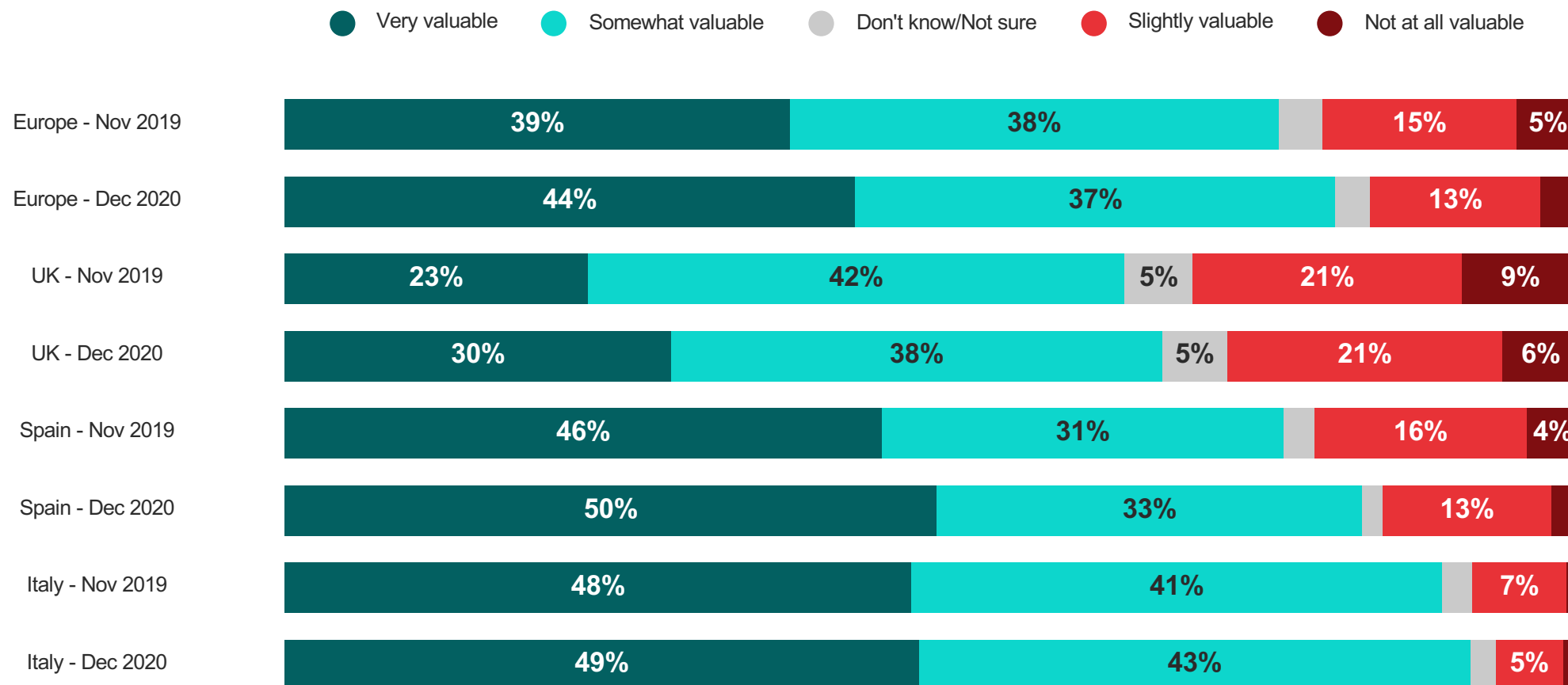
Think about each of the following types of information you might like to have about food you're considering purchasing. How valuable would it be to know the following?



BLOCKCHAIN & FOOD PROVENANCE

There was a slight increase in Europeans saying it would be valuable to be able to learn information about the farmers that grow their food in 2020, but a majority thought it would be valuable in 2019 and 2020

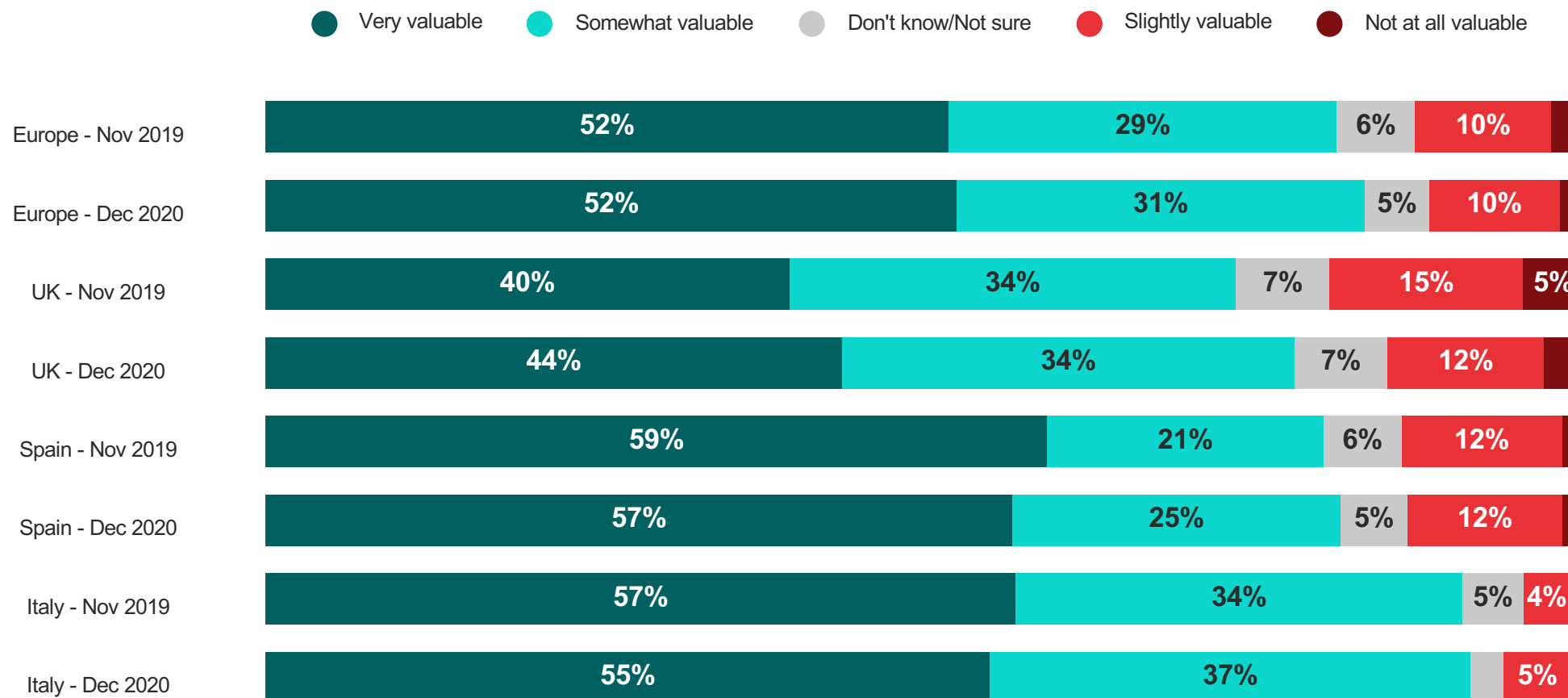
How valuable is it that you be able to learn information about the farmers that grow your food?



BLOCKCHAIN & FOOD PROVENANCE

Europeans were slightly more likely to say it is valuable that their food be traceable on the blockchain in 2020, but a majority in 2019 and 2020 reported it would be valuable to have food be traceable on the blockchain to trace food-borne illness and recalls

How valuable is it to you that your food be traceable on the blockchain, allowing public health authorities to identify the source of food-borne illnesses and allowing you to identify if your food may be impacted by a recall?



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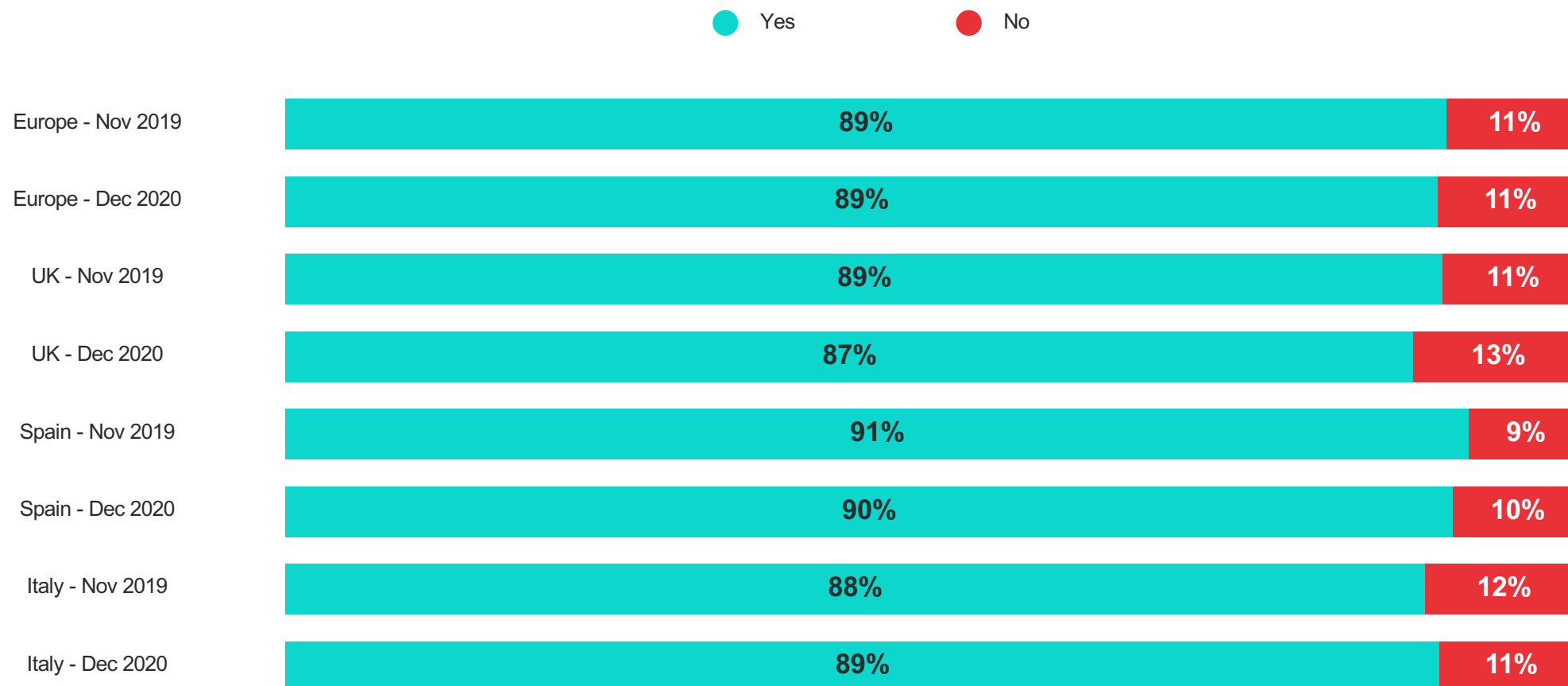
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FOOD RESPONSIBILITY DURING THE HOLIDAYS

A majority of Europeans reported they celebrate Christmas either in a religious or cultural capacity in 2019 and 2020

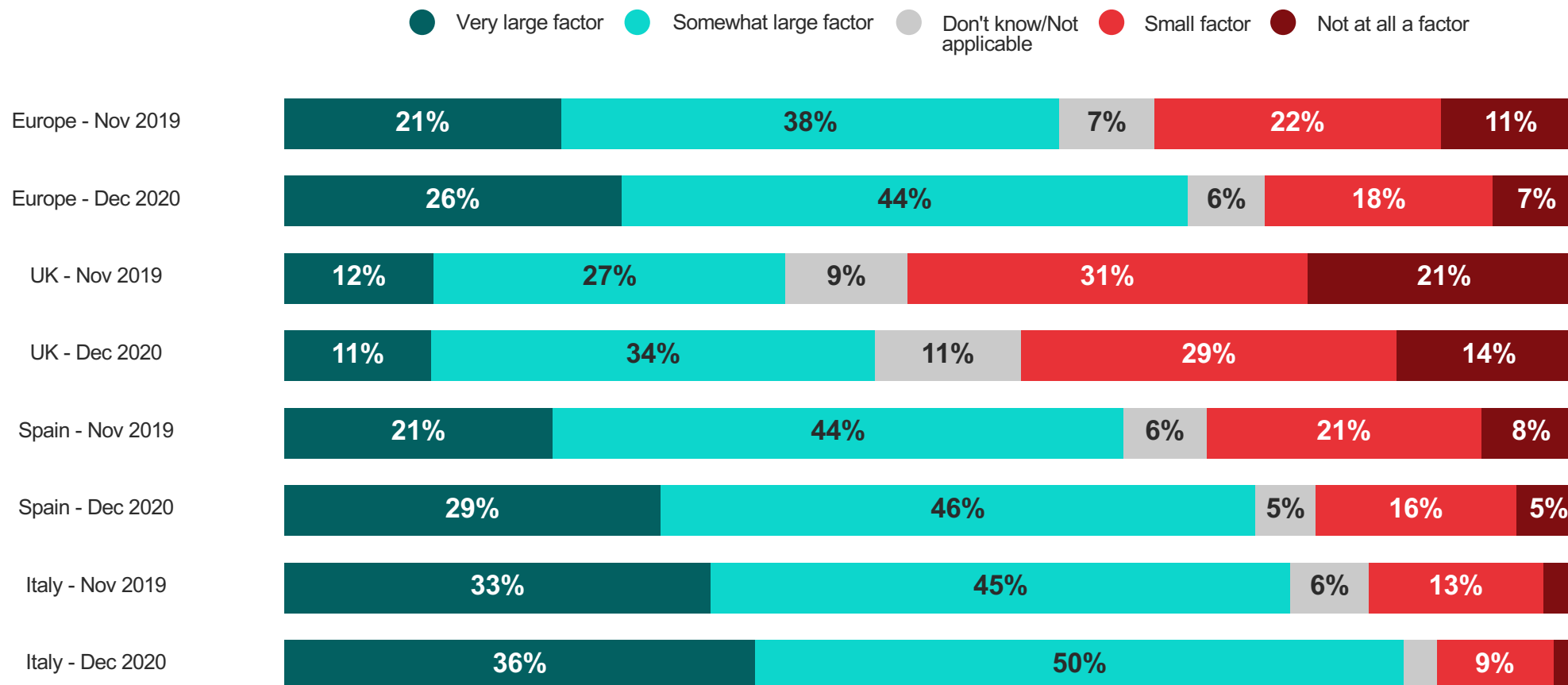
Do you currently celebrate Christmas, whether in a religious or cultural capacity?



FOOD RESPONSIBILITY DURING THE HOLIDAYS

There was an increase in Europe overall and across the studied countries of respondents reporting environmental sustainability is a large factor when it comes to purchasing their Christmas dinner or other festive meal essentials

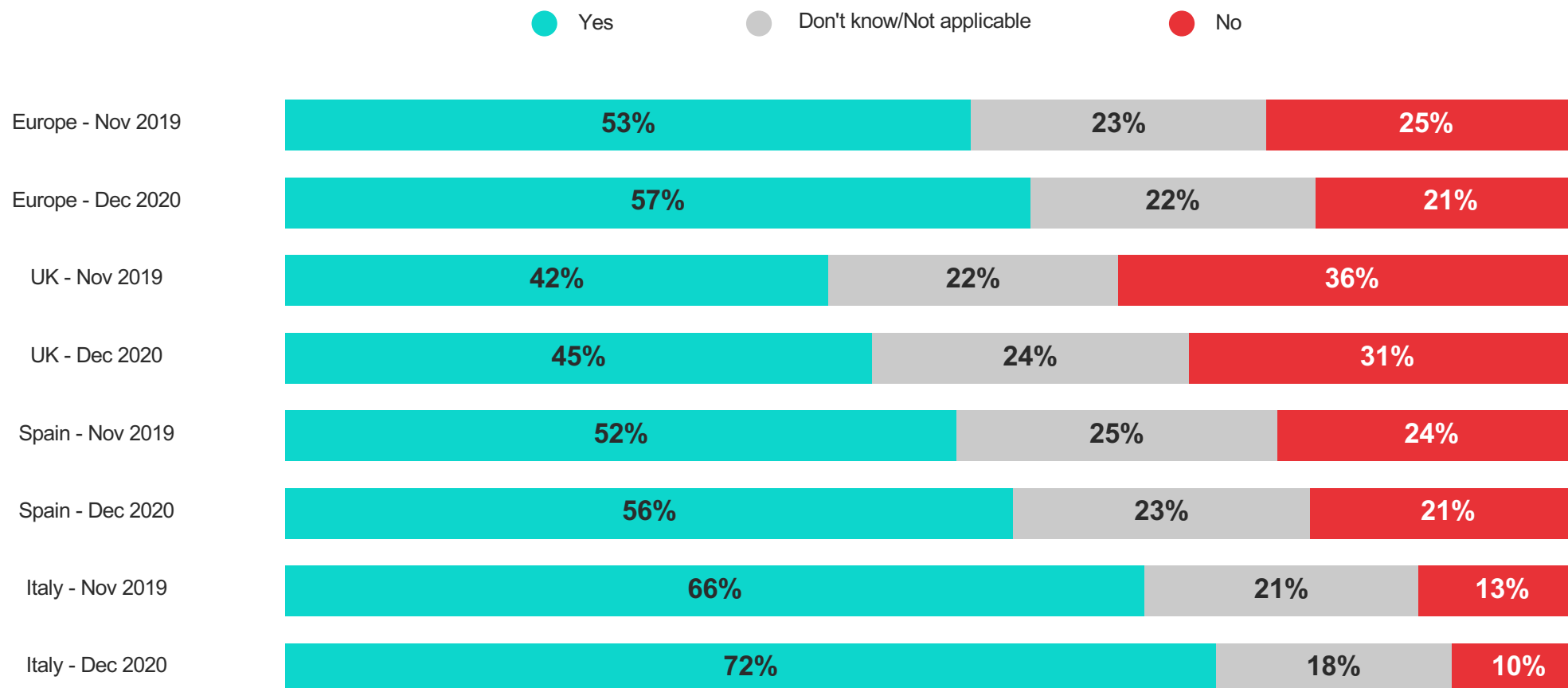
Thinking about the December holiday period, how much of a factor is environmental sustainability when it comes to purchasing your Christmas dinner or other festive meal essentials?



FOOD RESPONSIBILITY DURING THE HOLIDAYS

Europeans were more likely to report they would consider changing the ingredients in their Christmas dinner or other festive meals to be more sustainable in 2020

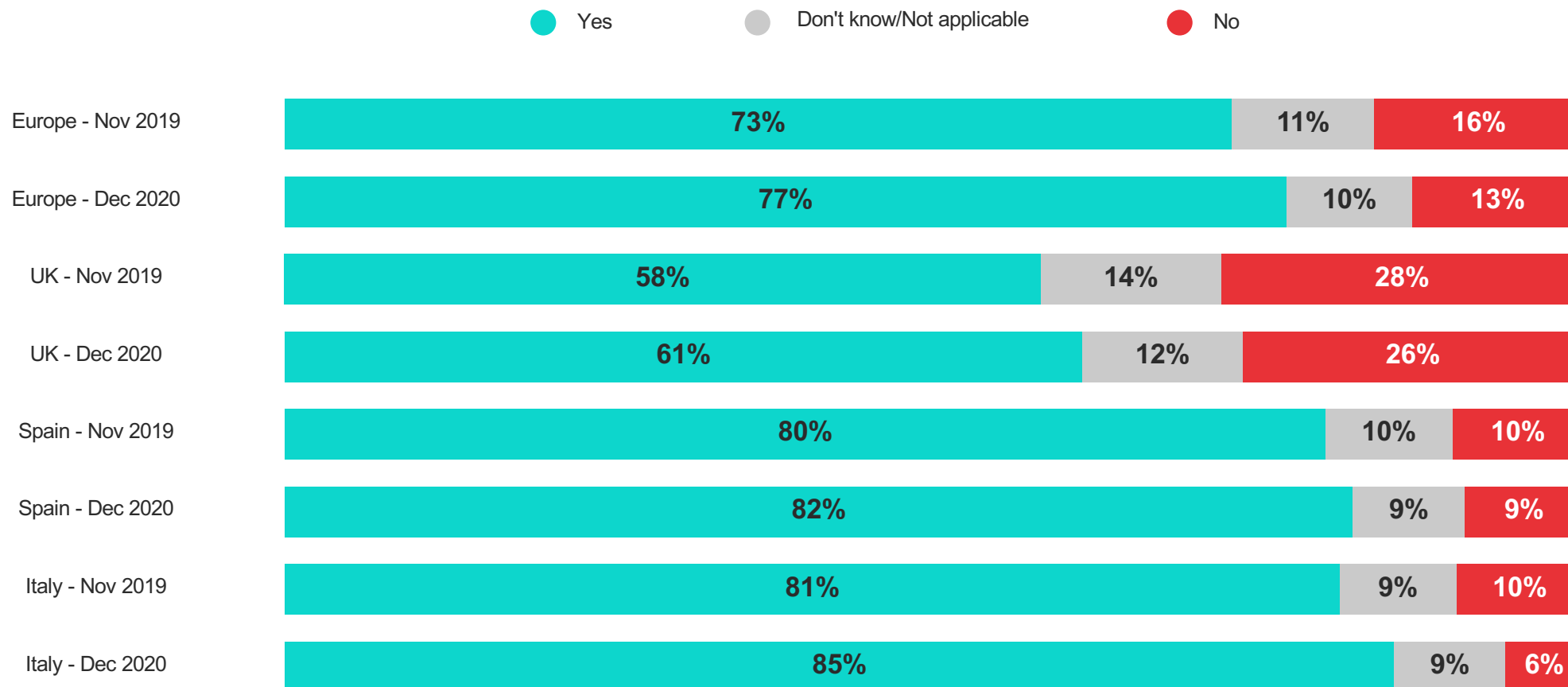
Would you consider changing the ingredients in your Christmas dinner or other festive meals to be more sustainable?



FOOD RESPONSIBILITY DURING THE HOLIDAYS

Europeans in 2020 were more interested in knowing more about where the food they eat in their Christmas dinner or other festive meals has come from

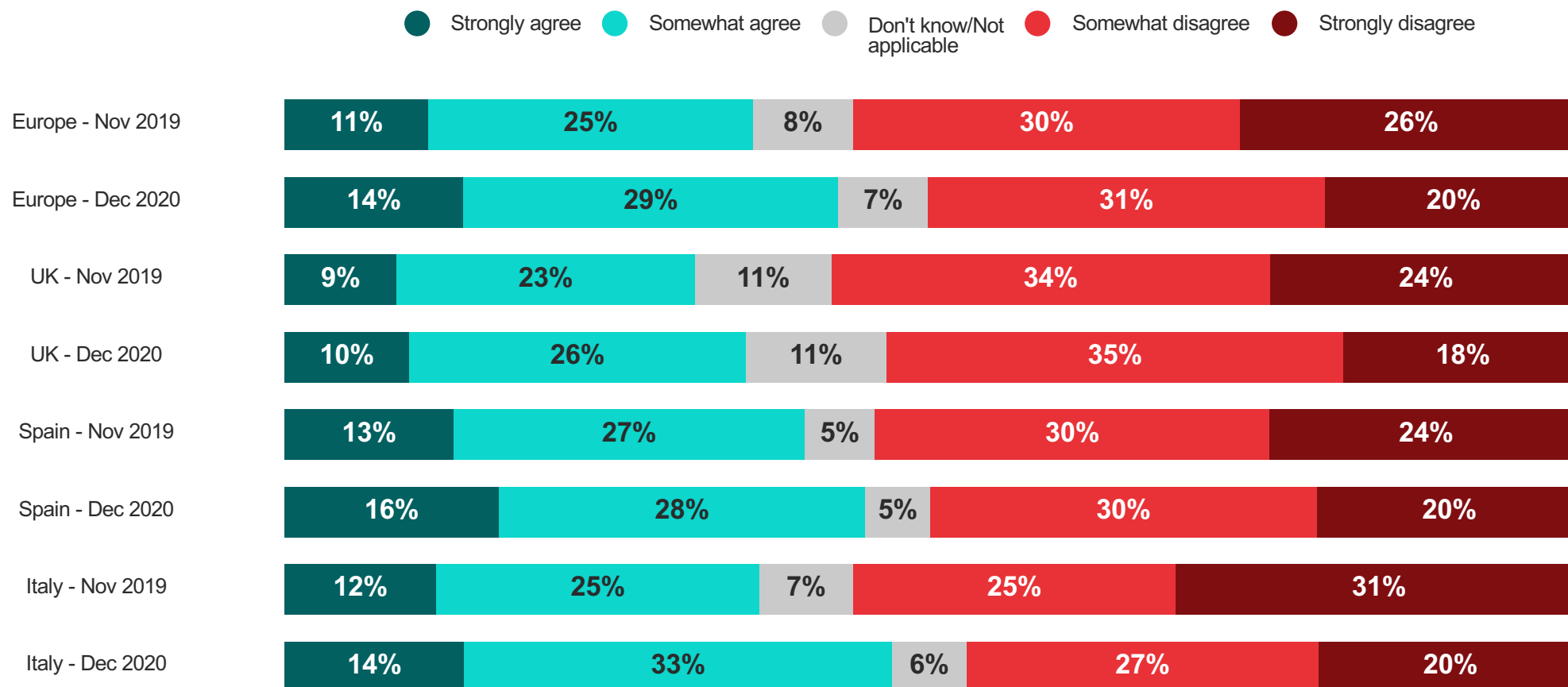
Would you like to know more about where the food you eat for your Christmas dinner or other festive meals has come from?



FOOD RESPONSIBILITY DURING THE HOLIDAYS

There was an increase in Europeans agreeing that they are more conscious about being environmentally friendly during the December holidays compared to the rest of the year in 2020, but a majority still disagree that they are more environmentally friendly during the December holidays

How far do you agree or disagree with the following statement?: I am more conscious about being environmentally friendly during the December holidays than I am during the rest of the year.



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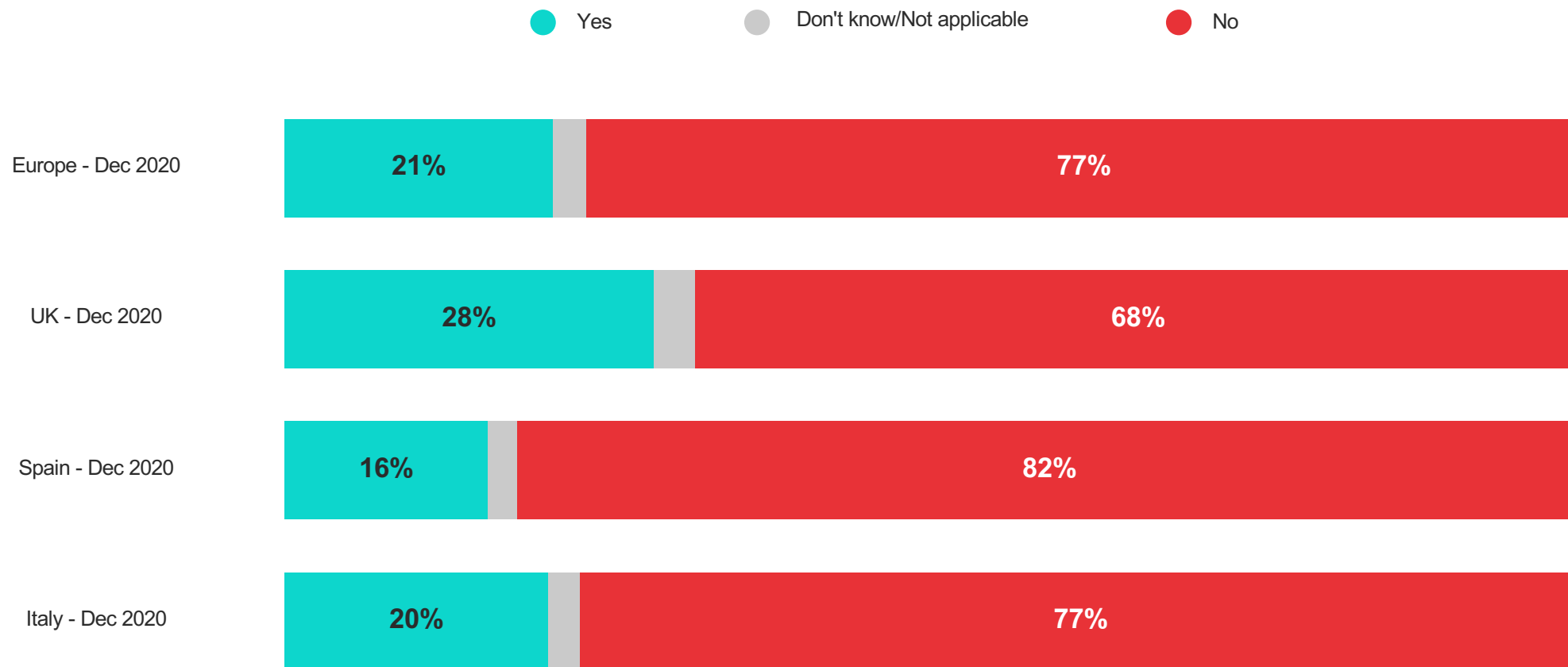
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IMPACT OF COVID-19

A majority of Europeans across all studied countries have not experienced any issues with food supply or restrictions as a result of the COVID-19 pandemic, but nearly three in ten (28%) in the UK reported they have experienced food supply issues

Have you experienced any issues with food supply or restrictions as a result of the COVID-19 pandemic?



IMPACT OF COVID-19

A plurality of Europeans across all studied countries reported their experiences with food supply or potential restrictions due to COVID-19 have made them neither more nor less likely to care about the sustainability of their food

Have any experiences with food supply or potential restrictions as a result of COVID-19 made you more or less likely to care about the sustainability of your food?

