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ITALIAN FOOD RESPONSIBILITY STUDY

Survey Results

November 14-18, 2019

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Key Points

- 1** 88% of Italians agree that it is important to them that they know where their food has come from, and 75% say that they'd be willing to pay more for food that has come from an ethical and responsible source.
- 2** Over a third (37%) of Italians say cost is preventing them from eating more responsibly sourced food, and another third say that they aren't eating responsibly because they can't find reliable information on where their food comes from
- 3** Over two in five (41%) adults in Italy say that food production innovations they are most excited for are about locally grown or sourced food.
- 4** 91% of Italians say that having food be traceable on the blockchain would be valuable, with over half (57%) saying it would be very valuable. Nearly nine in ten (89%) Italian adults say that learning information about the farmers that grow their food is valuable.
- 5** Eight in ten (83%) Italian adults are concerned about soil degradation, and around three in five (62%) Italian adults would consider paying slightly more at the supermarket for food grown in sustainable soil, with another 14% saying they would pay significantly more.
- 6** Two thirds (66%) of Italian adults would consider changing the ingredients in their Christmas or other December festive meals to be more sustainable.

Methodology

This poll was conducted from November 14-16, 2019, among a national sample of 2000 Italian adults. The interviews were conducted online and the data were weighted to approximate a target sample of Italian adults based on age, race/ethnicity, gender, educational attainment, and region. Results from the full survey have a margin of error of plus or minus 2 percentage points.

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**Food Responsibility During the
Holidays**

88% of Italians agree that it is important to them that they know where their food has come from, and 75% say that they'd be willing to pay more for food that has come from an ethical and responsible source.

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

● Strongly agree ● Somewhat agree ● Don't know/No opinion ● Somewhat disagree ● Strongly disagree

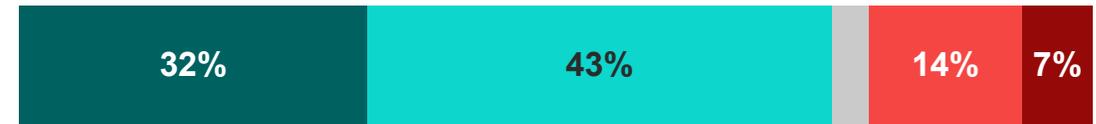
It is important to me that I know where my food has come from.



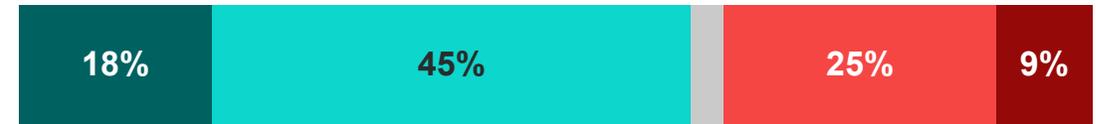
I care that my food has come from a source that is ethical and responsible.



I would be willing to pay more for food that has come from an ethical and responsible source.



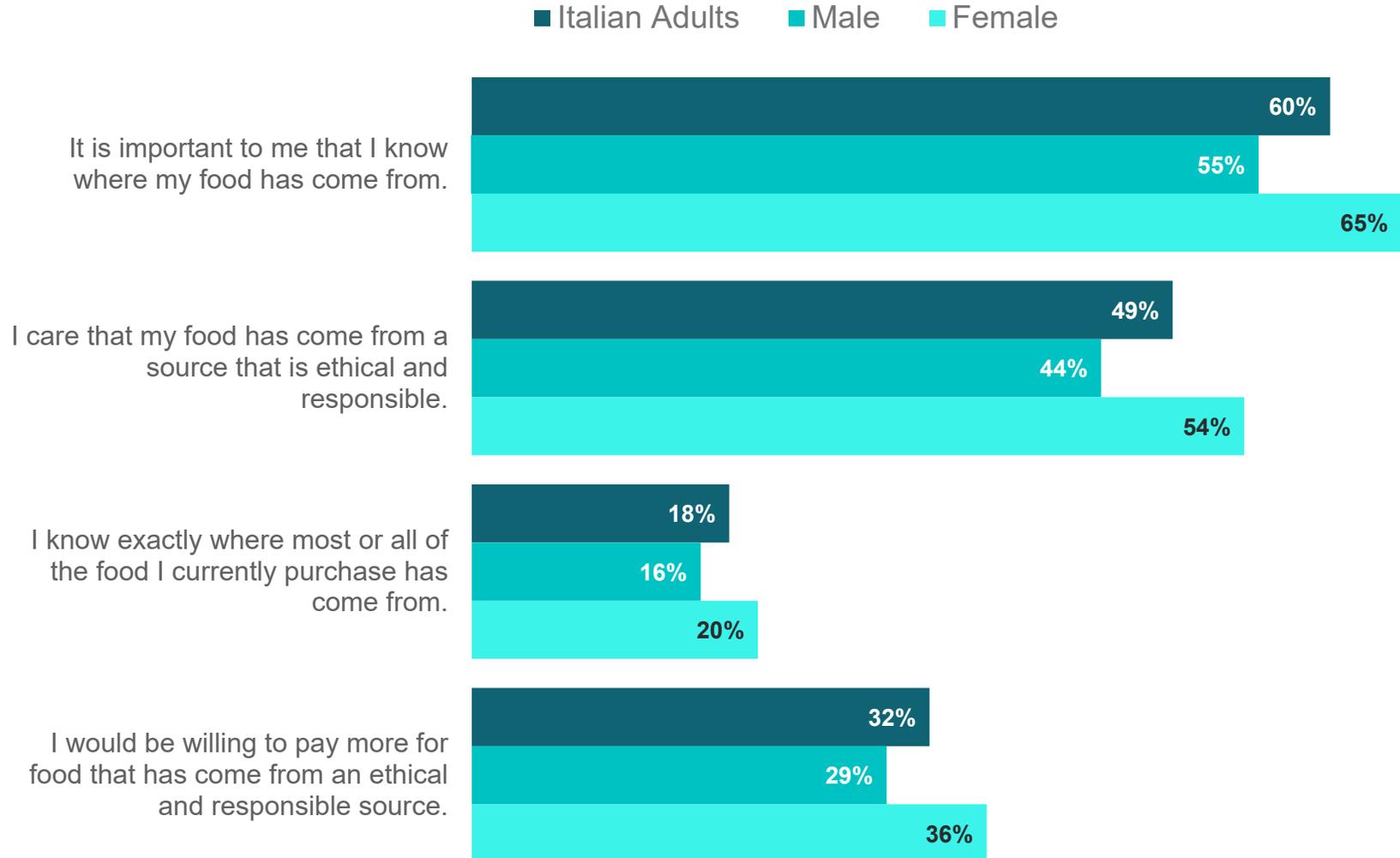
I know exactly where most or all of the food I currently purchase has come from.



General Attitudes Towards Food Responsibility

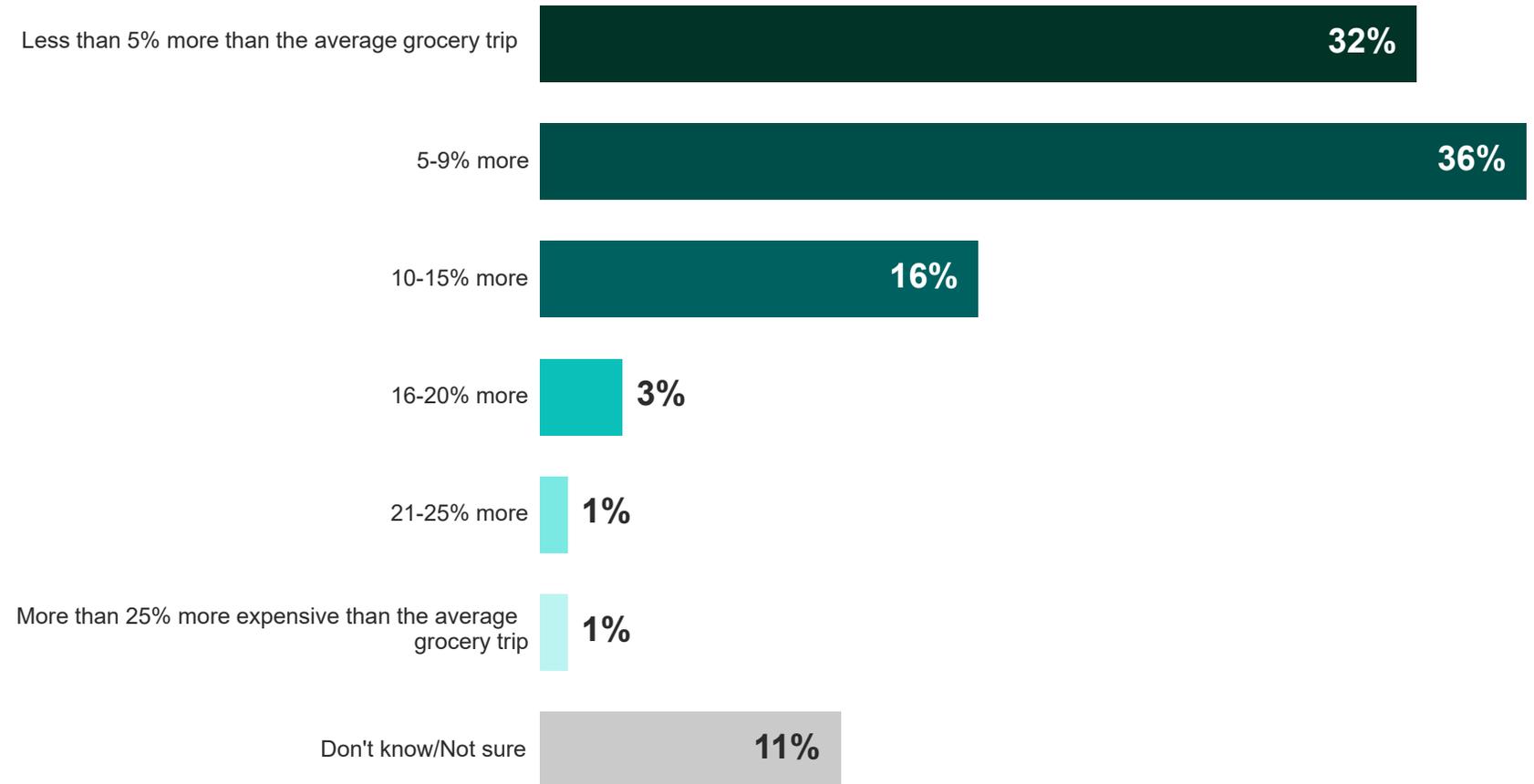
General Attitudes Towards Food Responsibility

Across all metrics, women are more concerned about food responsibility than men
How far do you agree or disagree with the following statements?
[% indicating they strongly agree with the statement]



Over a third of Italians would be willing to pay 5-9% more for sustainably sourced food

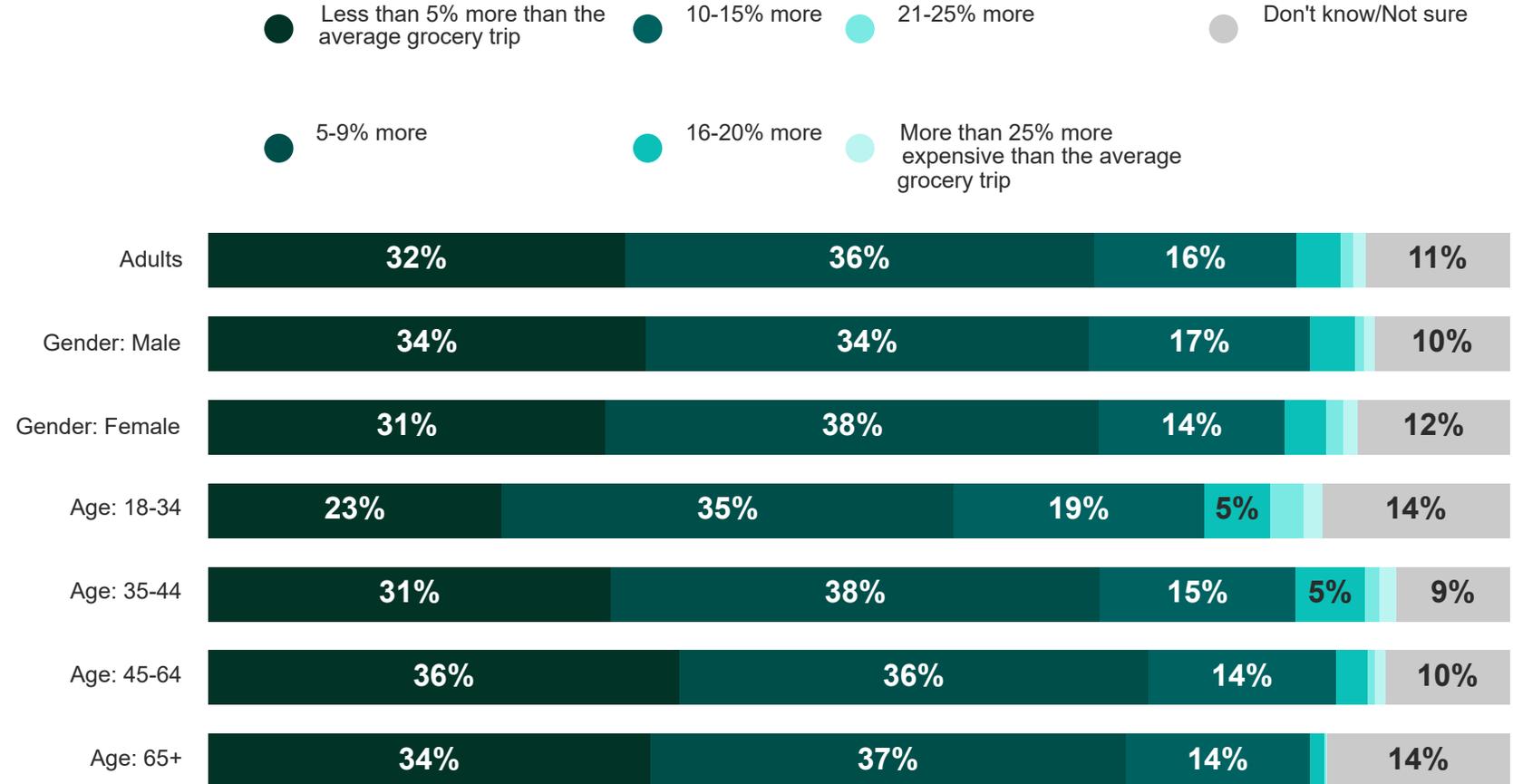
You mentioned you agree that you would be willing to pay more for food that has come from a sustainable source. Compared to your average grocery shop, how much more would you be willing to pay if you could guarantee that your food was coming from a sustainable source?



General Attitudes Towards Food Responsibility

Women are slightly more likely to be willing to pay 5-9% more for sustainably sourced food than men

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?

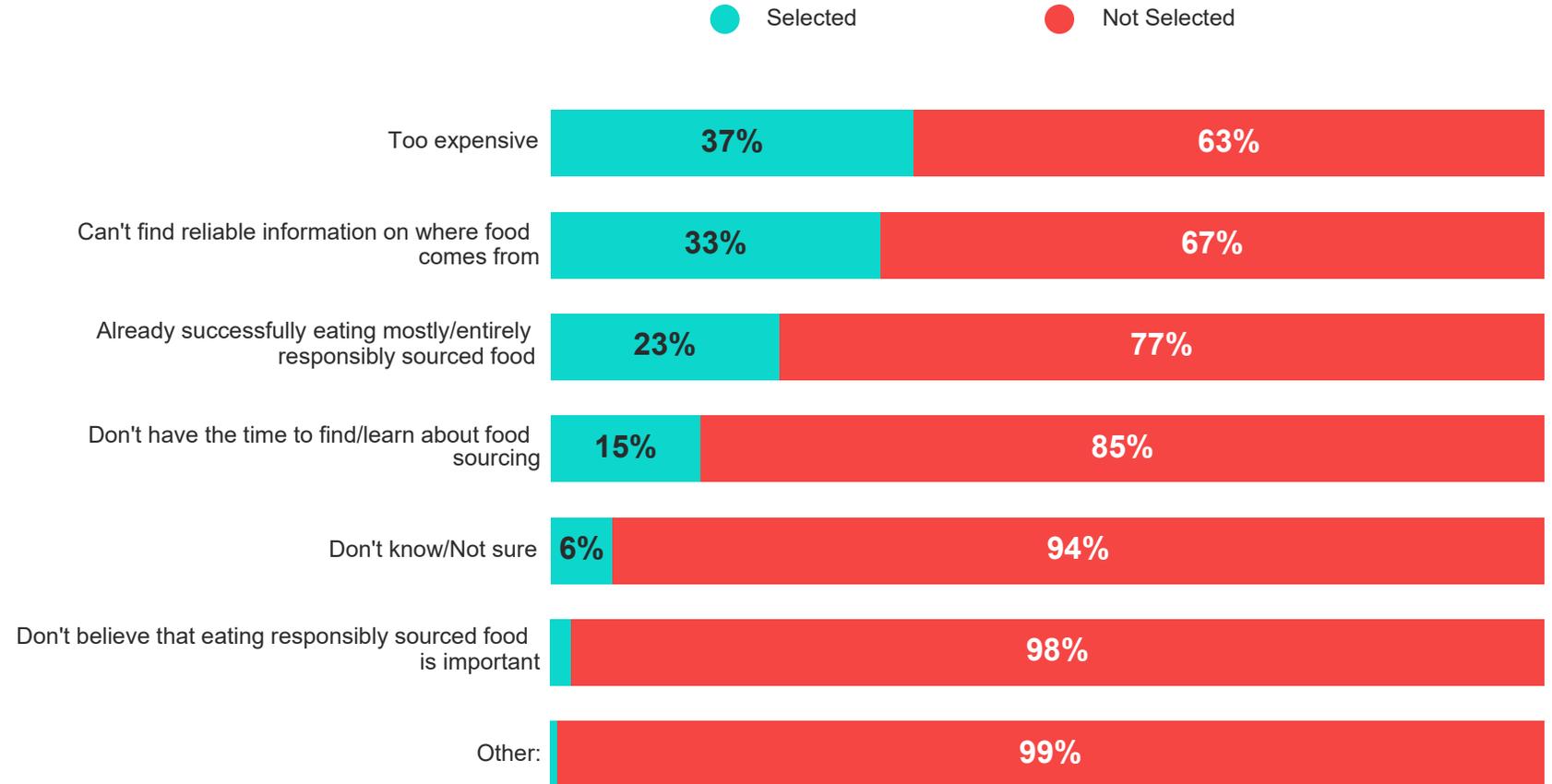


General Attitudes Towards Food Responsibility

General Attitudes Towards Food Responsibility

Over a third of Italians say cost is preventing them from eating more responsibly sourced food, and another third say they can't find reliable information on where their food comes from

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

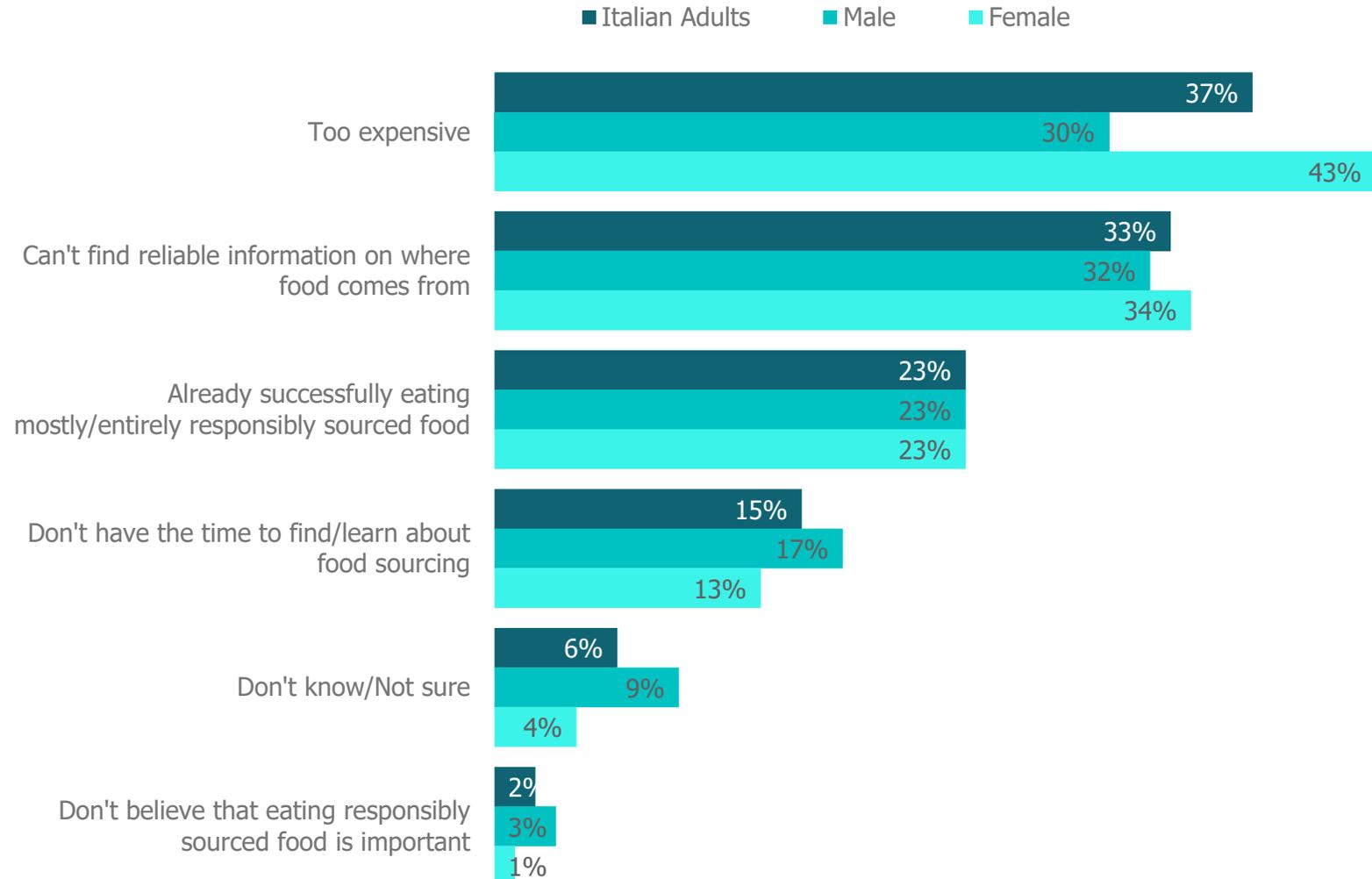


General Attitudes Towards Food Responsibility

Women are more likely than men to say cost is their main barrier for eating more responsibly sourced food

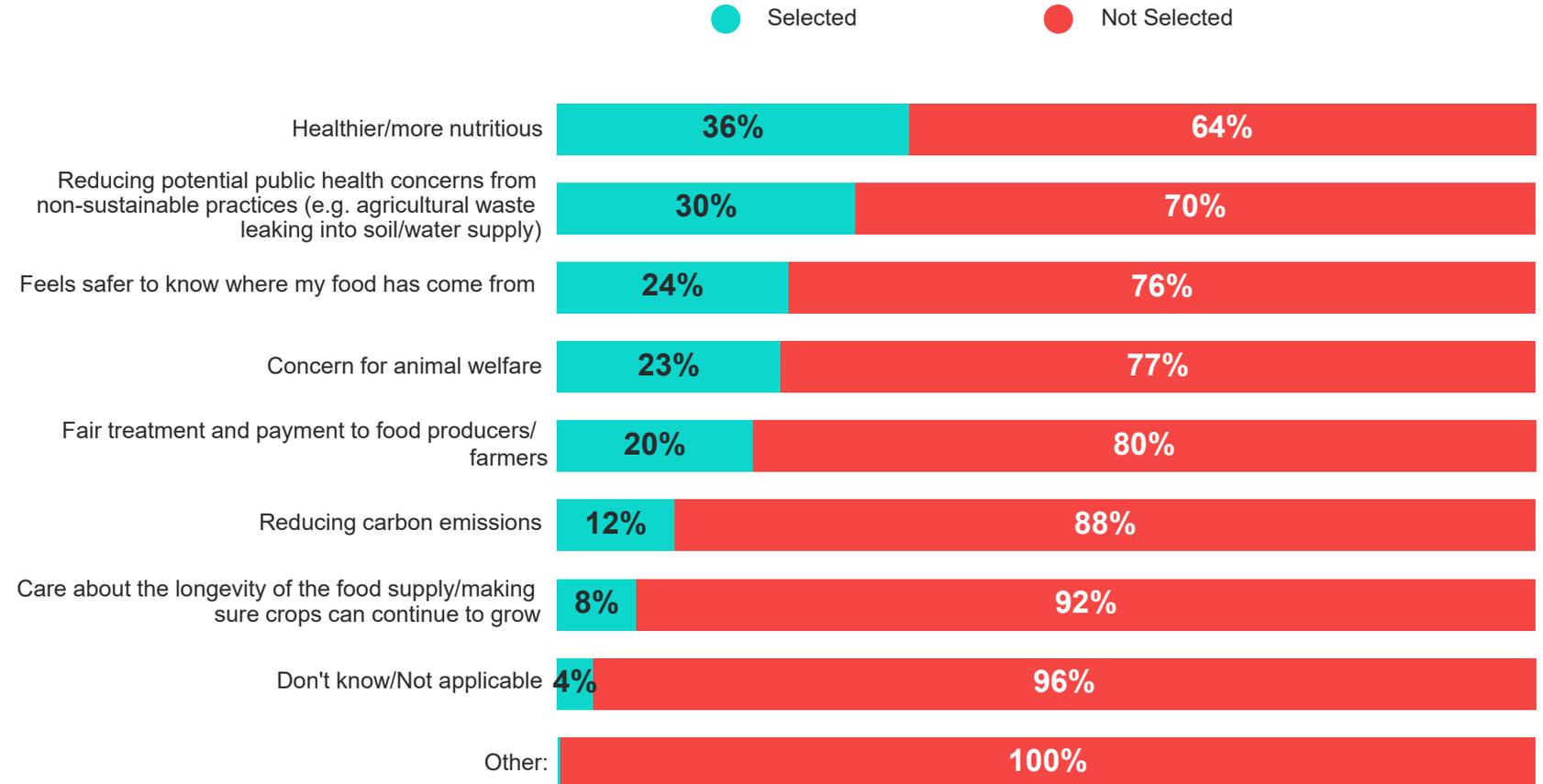
What, if anything, is holding you back from eating more responsibly sourced food? Select all that apply.

[% selecting this statement]



Over a third (36%) of Italians say the most compelling reason to eat or buy more sustainable food is that its is healthier.

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.



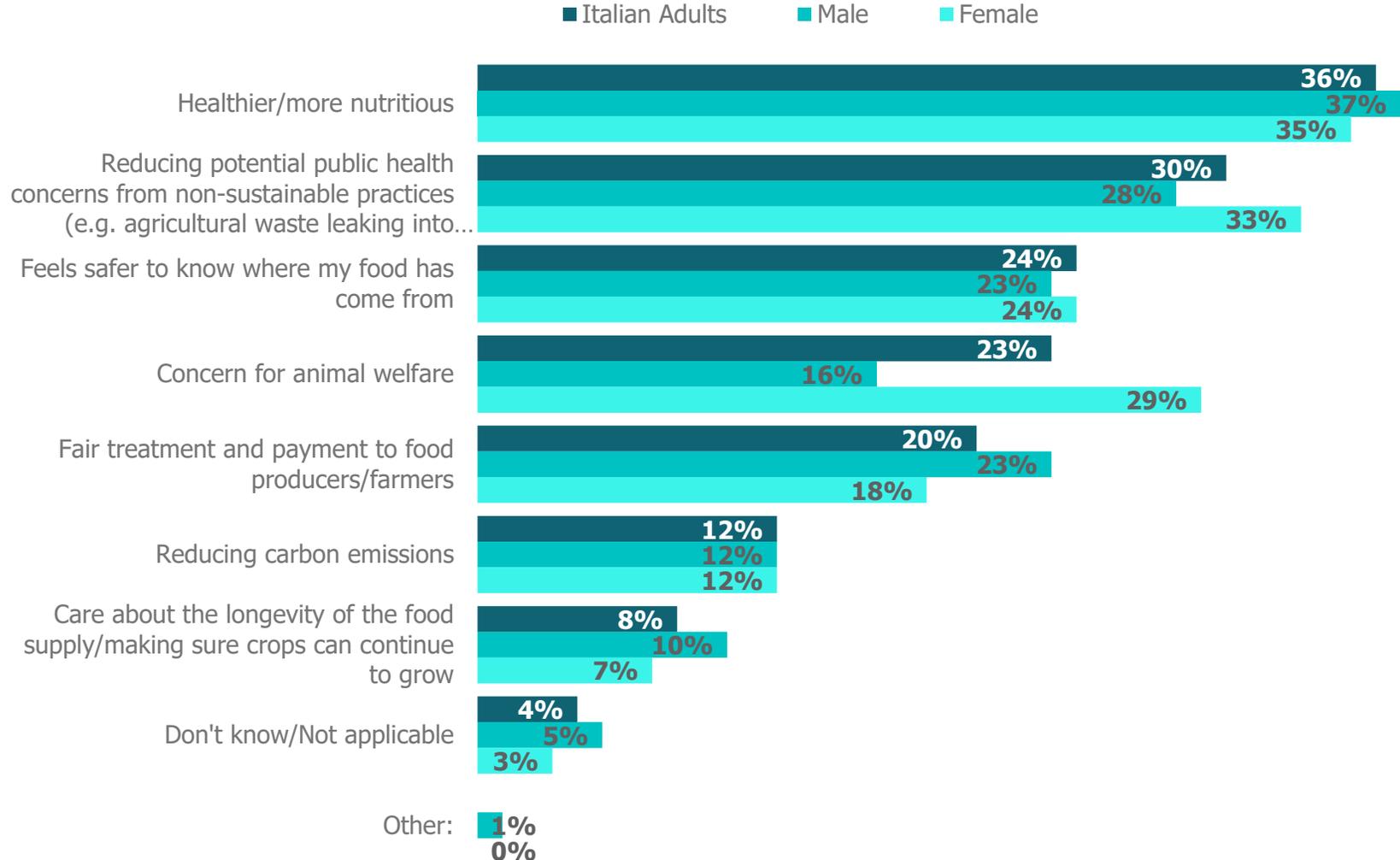
General Attitudes Towards Food Responsibility

General Attitudes Towards Food Responsibility

Women are more likely to select ‘concern for animal welfare’ and ‘reducing potential public health concerns’ as compelling reasons to decide to eat or buy more sustainable food.

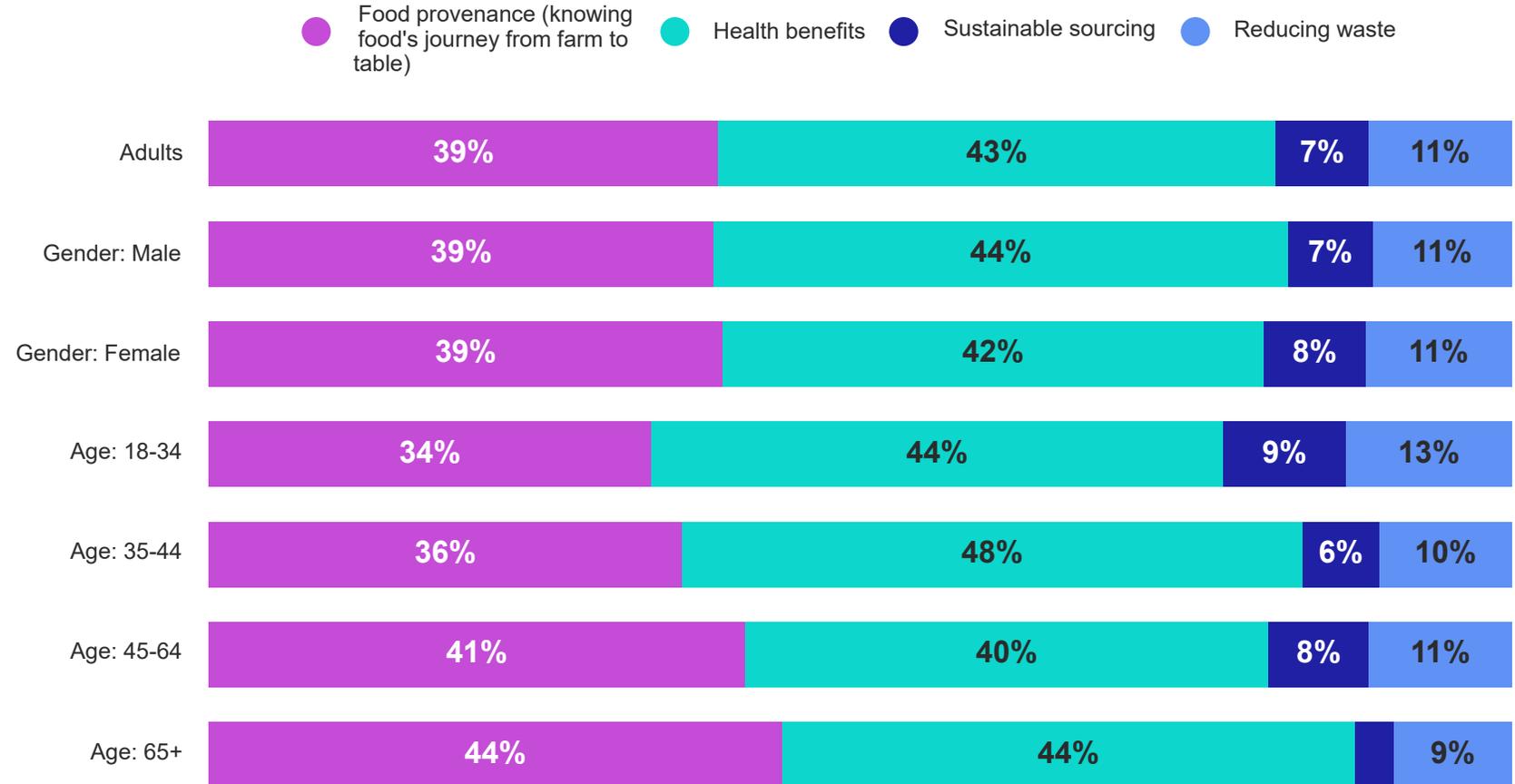
What reasons do you find most compelling when it comes to the decision to eat and/or buy more sustainable food? Select no more than two.

[% selecting this statement]



Adults in Italy generally consider health benefits most important when it comes to food, followed by food provenance. Older adults are more likely to consider food provenance as most important.

Rank these in order of what would you consider most important when it comes to food: **[Broken out by % ranking each option number 1]**



General Attitudes Towards Food Responsibility

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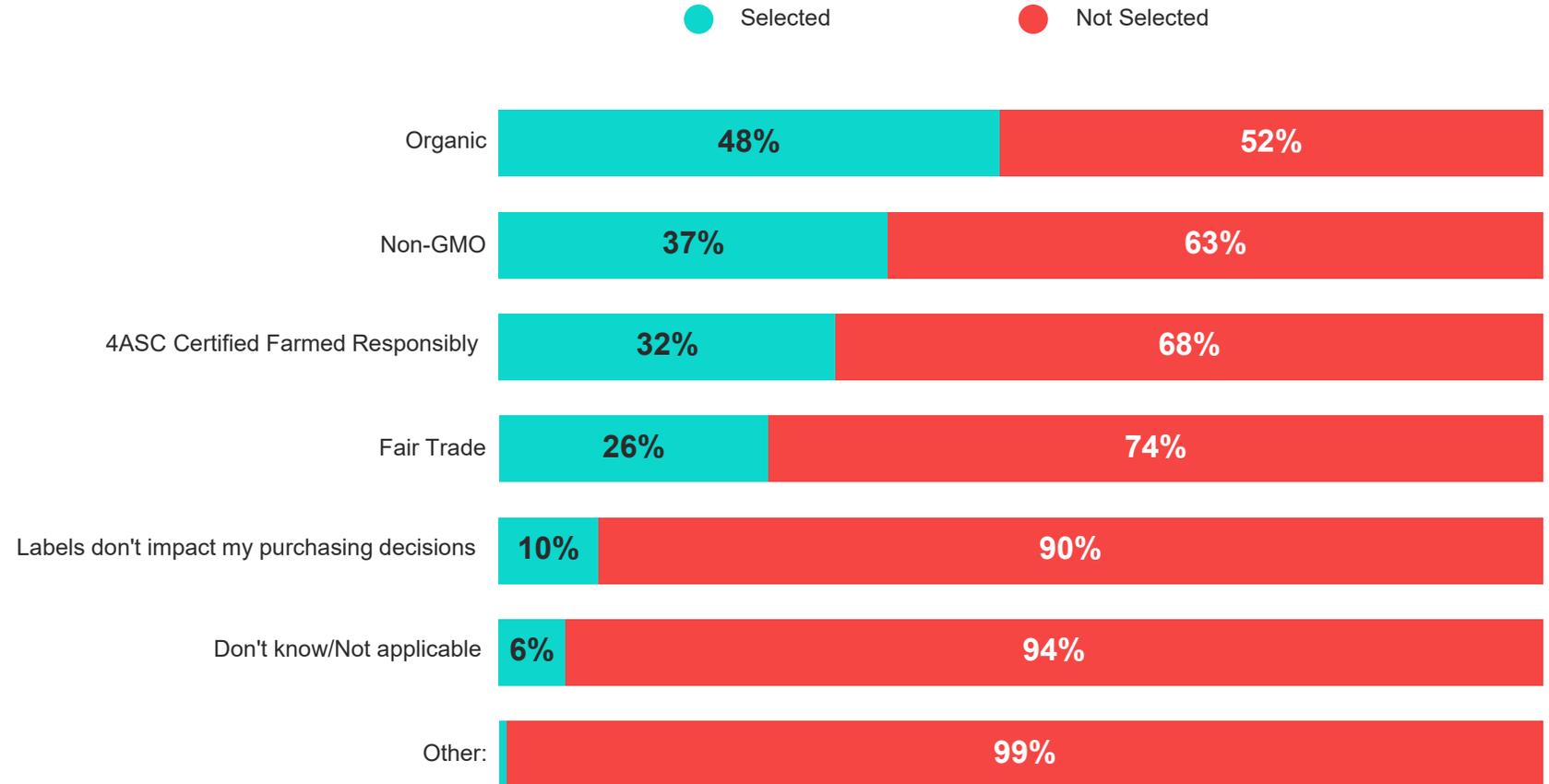


**Food Responsibility During the
Holidays**

Food Labeling and Product Preferences

Nearly half (48%) of Italian adults report being more likely to purchase food items if they are labeled as organic.

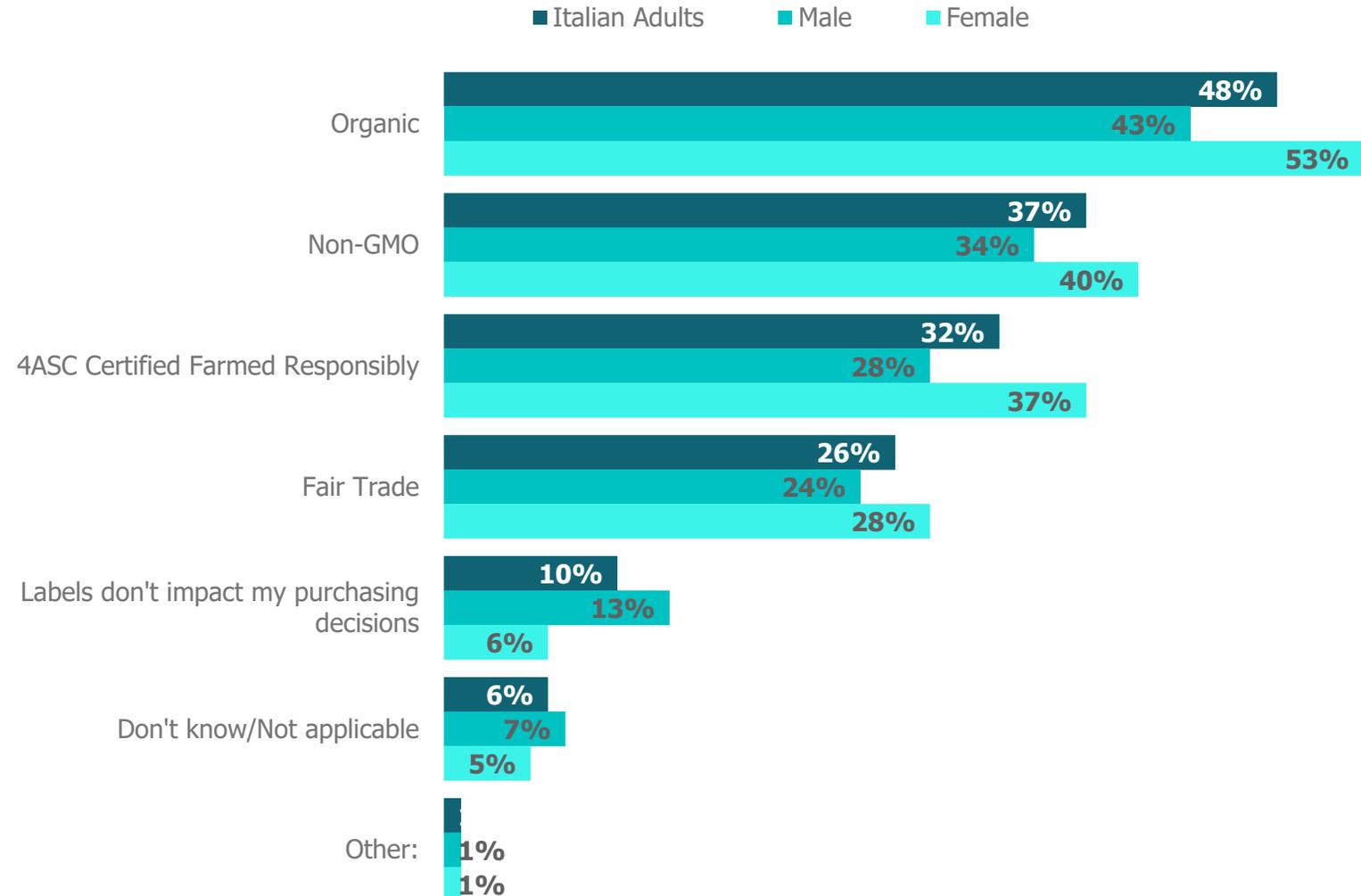
Which of the following labels, if you saw it on a food item in the grocery store, would make you more likely to purchase that item? Select all that apply.



Women are more likely to purchase food items with a variety of sustainable labels on them, especially those that are organic and farmed responsibly. Men are more than twice as likely to say that labels don't impact their purchasing decisions.

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.

[% selecting this statement]



Food Labeling and Product Preferences

Food Labeling and Product Preferences

Nearly three-quarters (73%) of adults in Italy care about production information regarding meat. A majority care about production information regarding vegetables, fruit, and dairy.

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

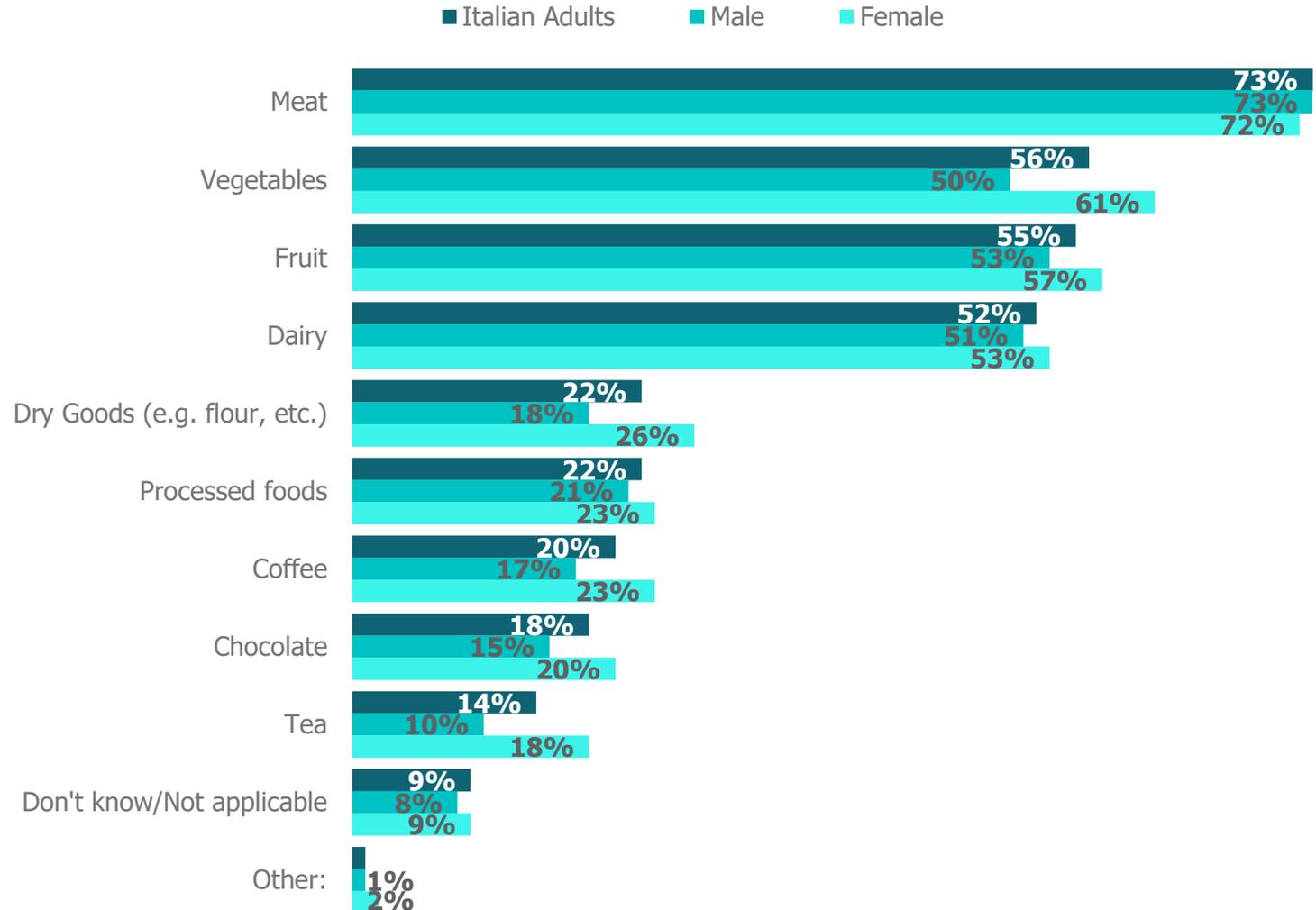


Food Labeling and Product Preferences

Both men and women care similarly about production information for meat and dairy. Women are more likely than men to care about production information regarding vegetables by a margin of 11 points.

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

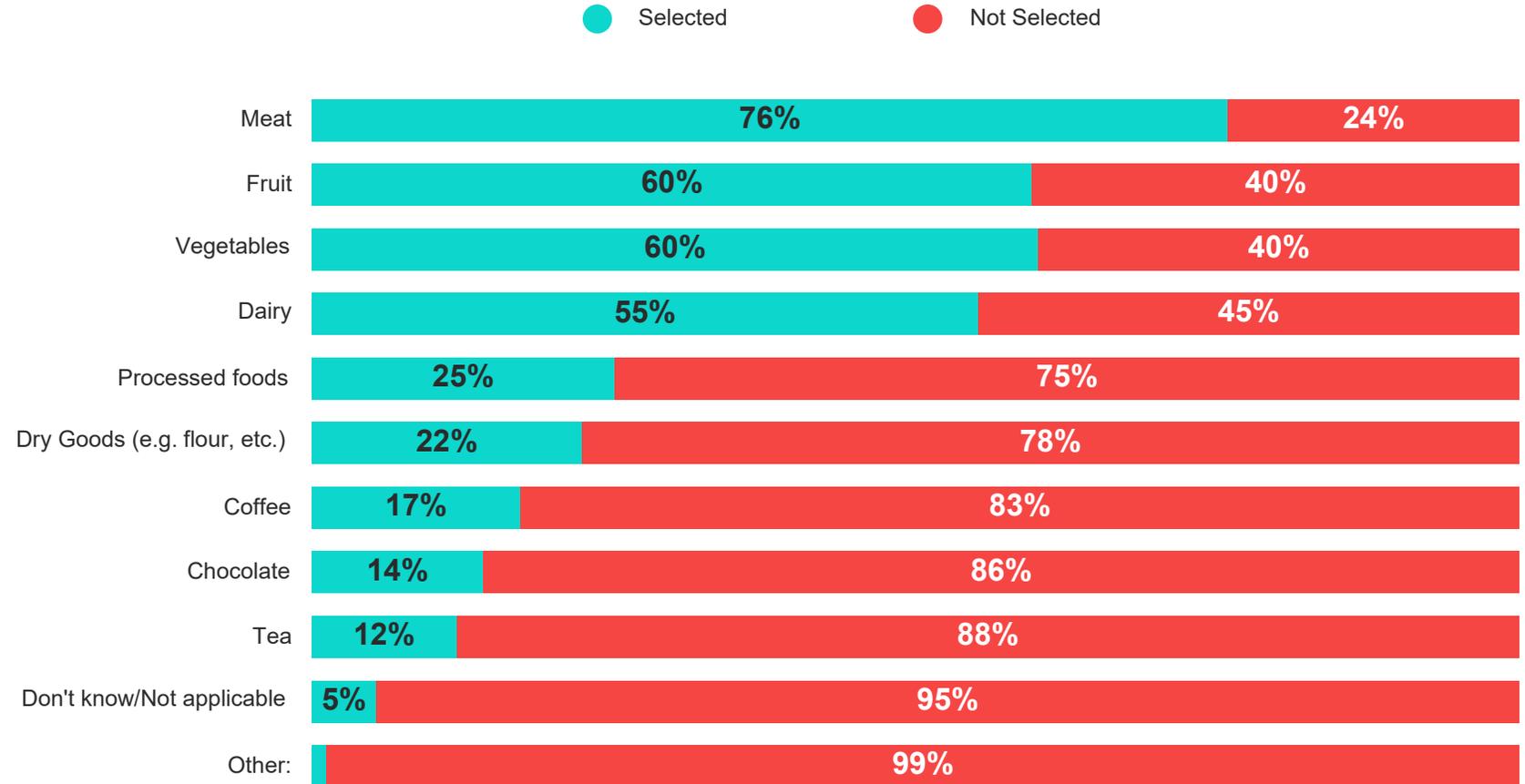
[% selecting this statement]



Food Labeling and Product Preferences

Over three-quarters (76%) of Italian adults care about information regarding provenance when it comes to meat, and 60% care about provenance when it comes to fruit and vegetables.

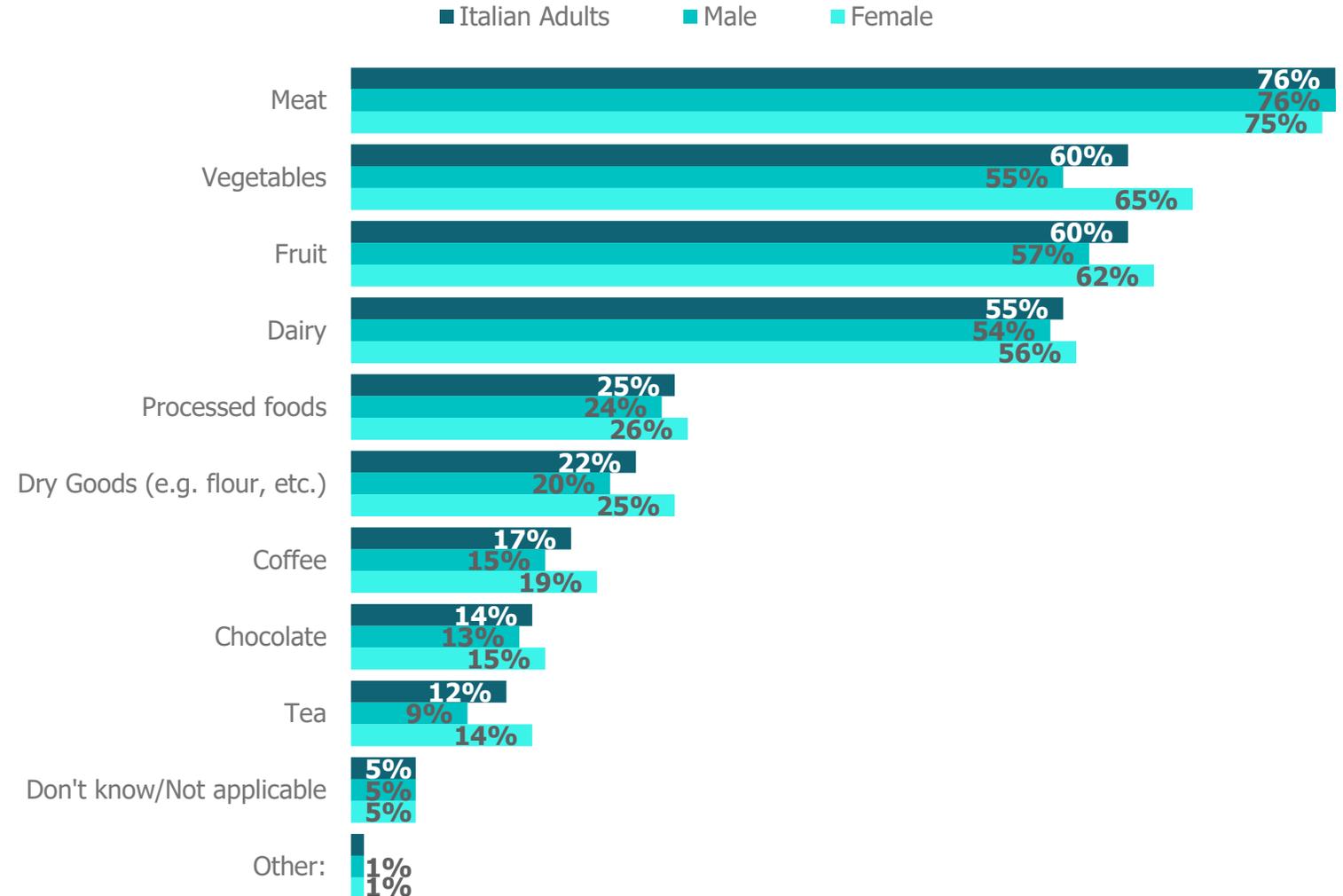
What categories of food do you most care about information regarding provenance (where the food originated)? Select all that apply.



Both men and women care similarly about production information for meat and dairy. Women are more likely than men to care about production information regarding vegetables by a margin of 11 points.

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

[% selecting this statement]



Food Labeling and Product Preferences

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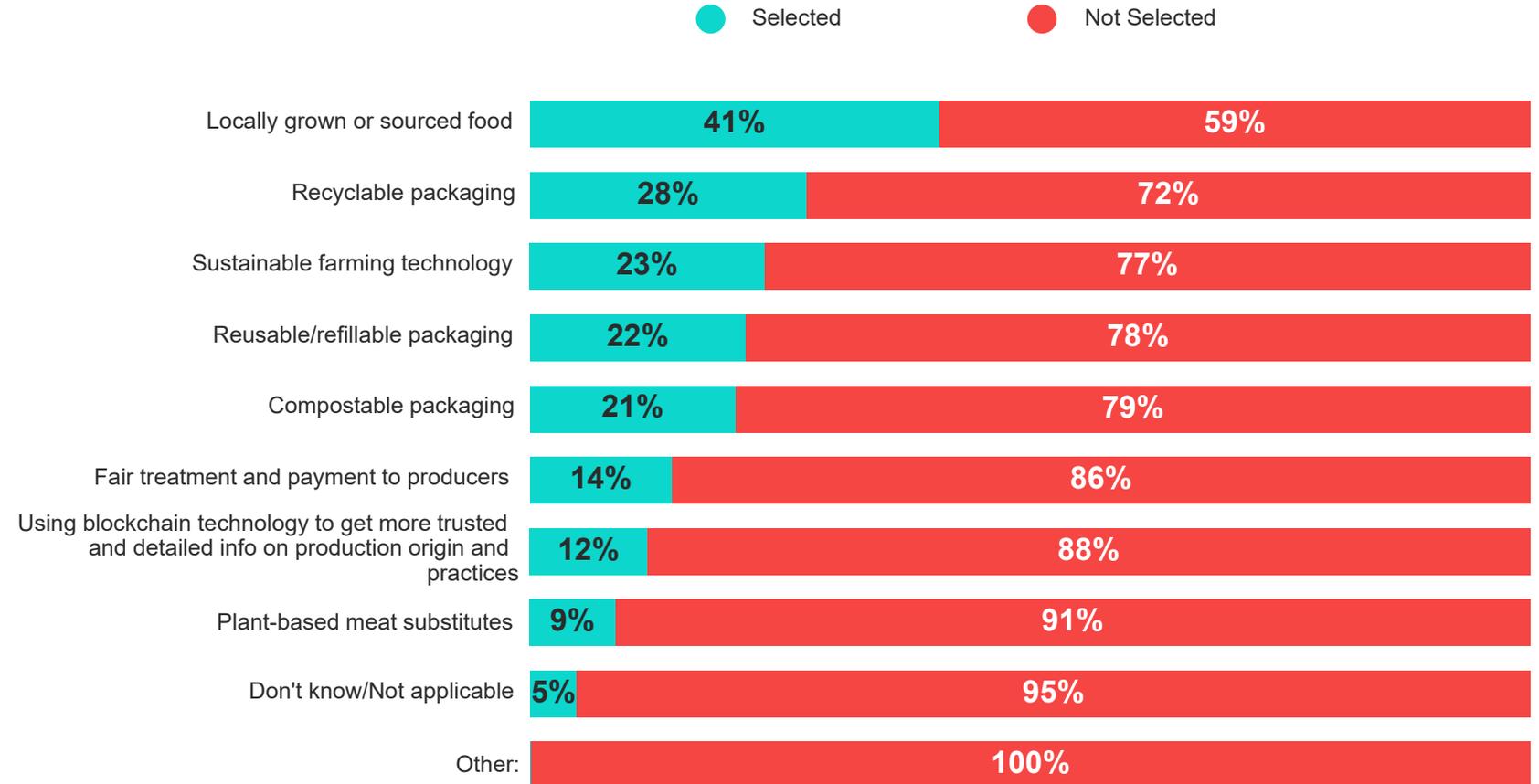


**Food Responsibility During the
Holidays**

Interest in Food Innovations

Two in five (41%) adults in Italy say that food production innovations they are most excited for are about locally grown or sourced food.

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

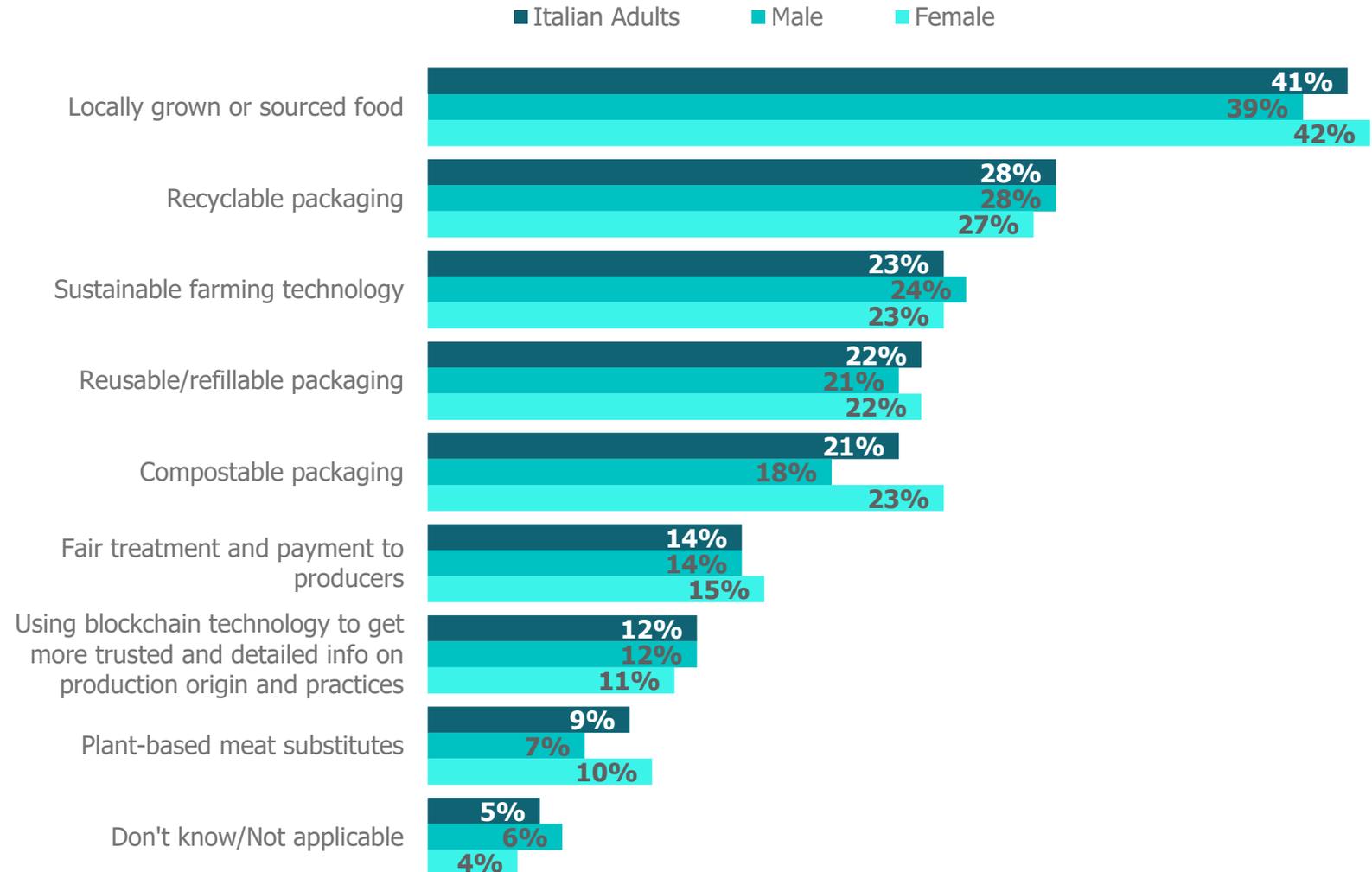


Interest in Food Innovations

Men and women are generally similarly excited about various innovations in food production, although women are slightly more excited about locally grown food and compostable packaging.

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

[% selecting this statement]

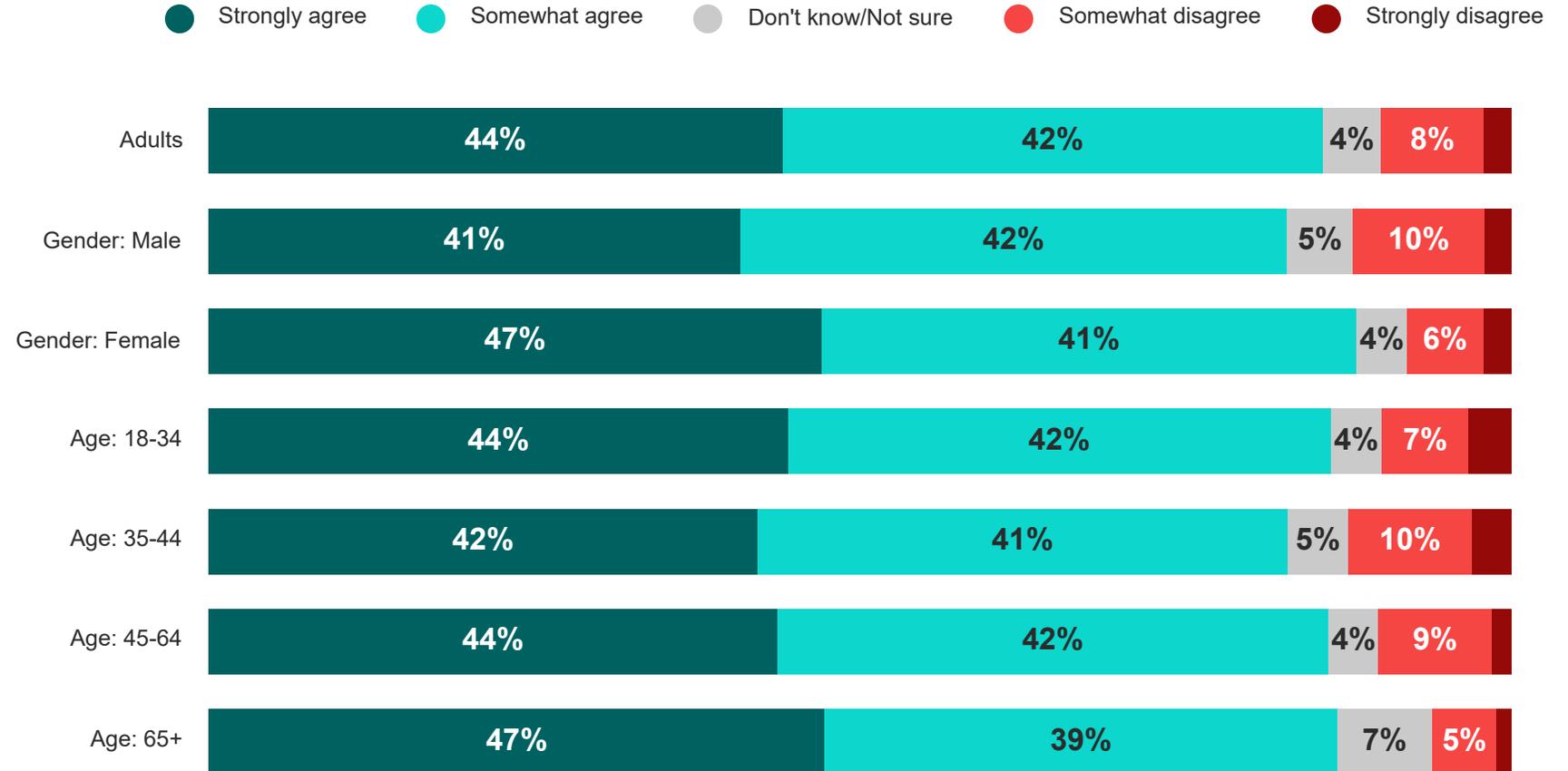


Interest in Food Innovations

Over eight in ten Italian adults say they would prefer supermarkets to respond faster to the latest consumer food trends.

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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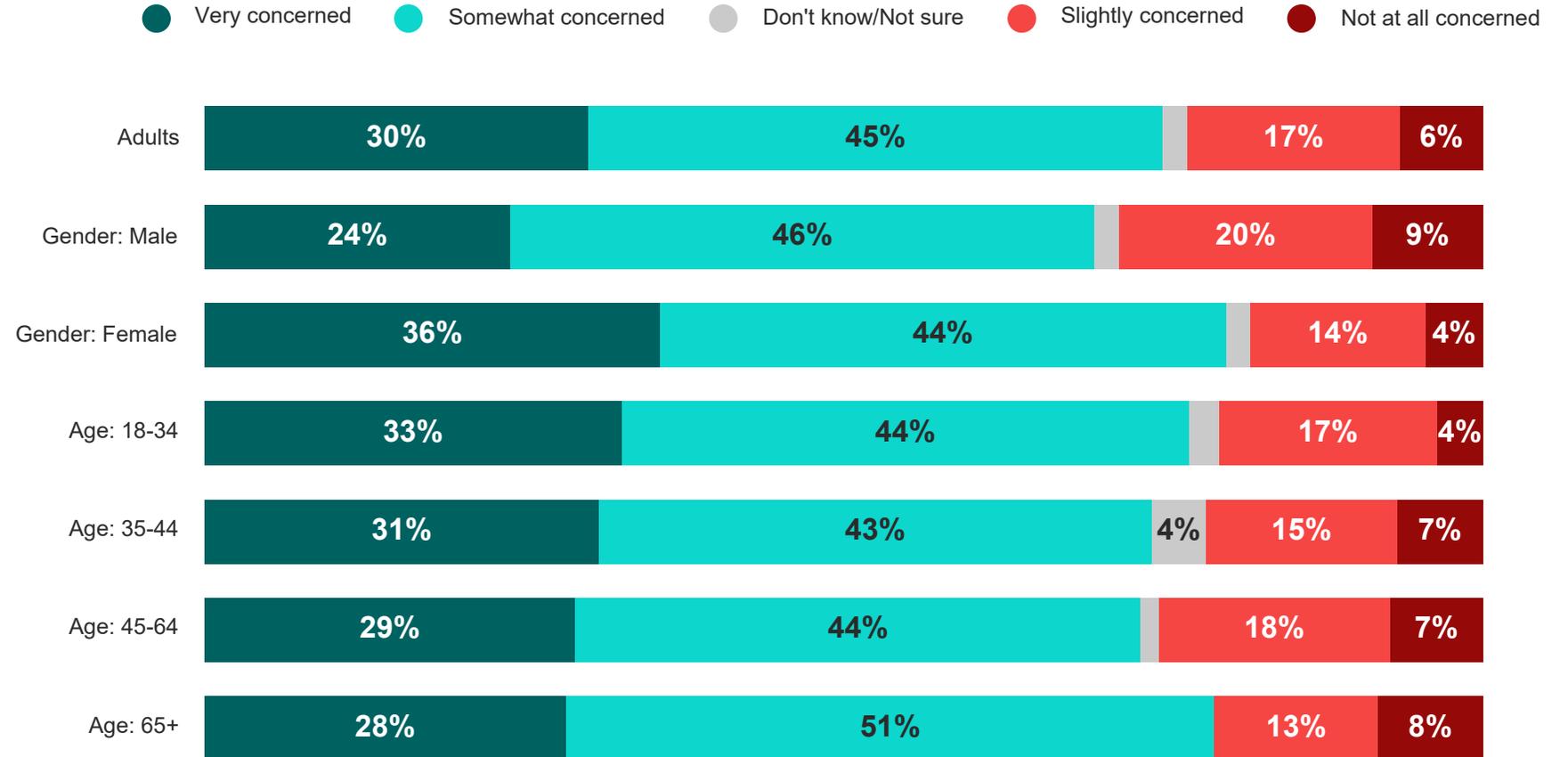
Soil Degradation



**Food Responsibility During the
Holidays**

Three quarters of Italian adults are very or somewhat concerned about food waste; Italian women are more likely than men to report being concerned about food waste by a margin of 10 points.

How concerned are you about food waste?

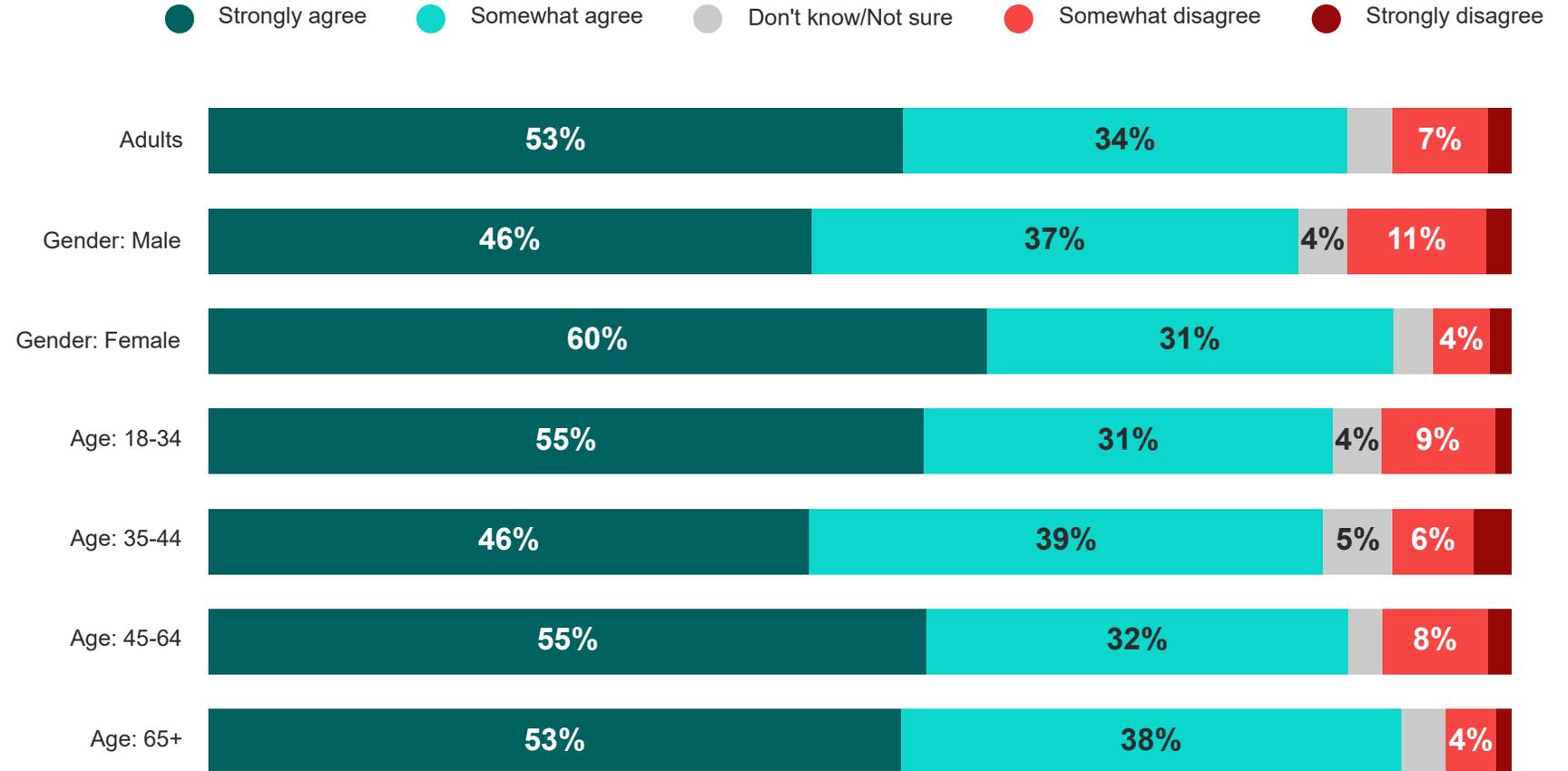


Concerns with Food Waste

Over nine in ten (91%) women in Italy say they would be more willing to shop at a supermarket brand with initiatives to reduce food waste, compared to 83% of men.

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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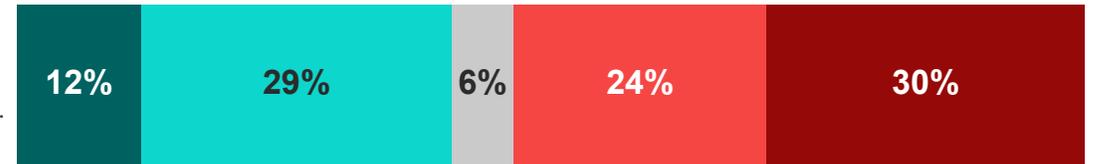
Food Responsibility During the
Holidays

A majority of Italian adults neither personally eat a more-plant based diet for the sake of the environment, nor agree that it is important for individuals to do so for the environment's future.

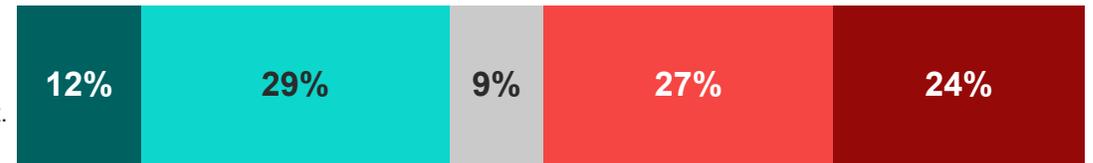
How far do you agree with the following statements?

● Strongly agree ● Somewhat agree ● Don't know/No opinion ● Somewhat disagree ● Strongly disagree

I personally am trying to eat a diet heavier in plant-based foods for the sake of environmental sustainability.



It is important for the future of the environment for more individuals to move to a plant-based diet.



Plant-based meats substitutes are an exciting new development that make me more interested in consuming a plant-based diet.

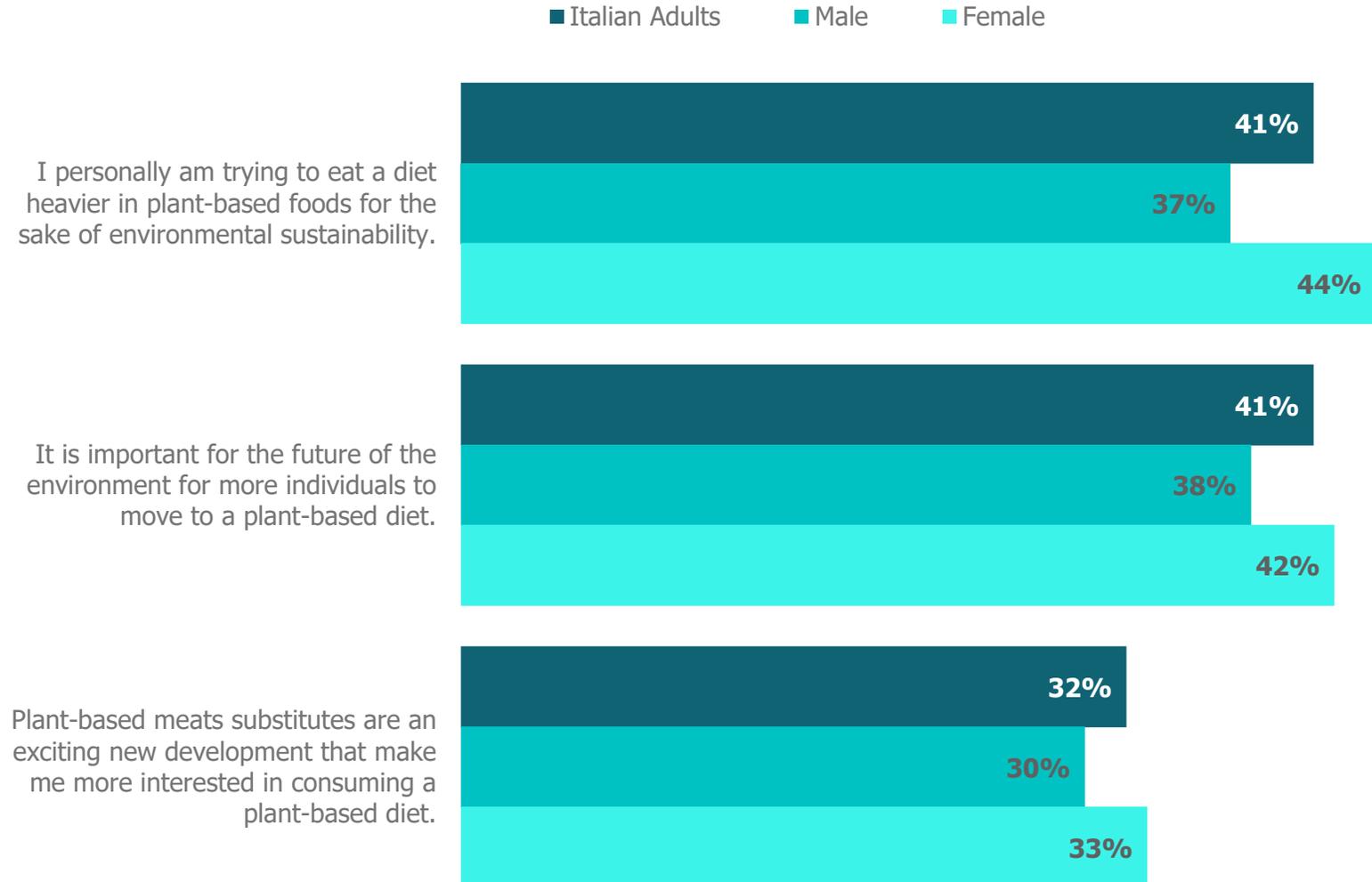


Plant-Based Diet Interests

Environmental Sustainability and Diet

Women are more likely than men to be trying to eat a more heavily plant-based diet for environmental sustainability, and to say that it is important for more individuals to do so for the sake of the environment.

*How far do you agree with the following statements?
[Showing % Strongly Agree + Somewhat Agree]*



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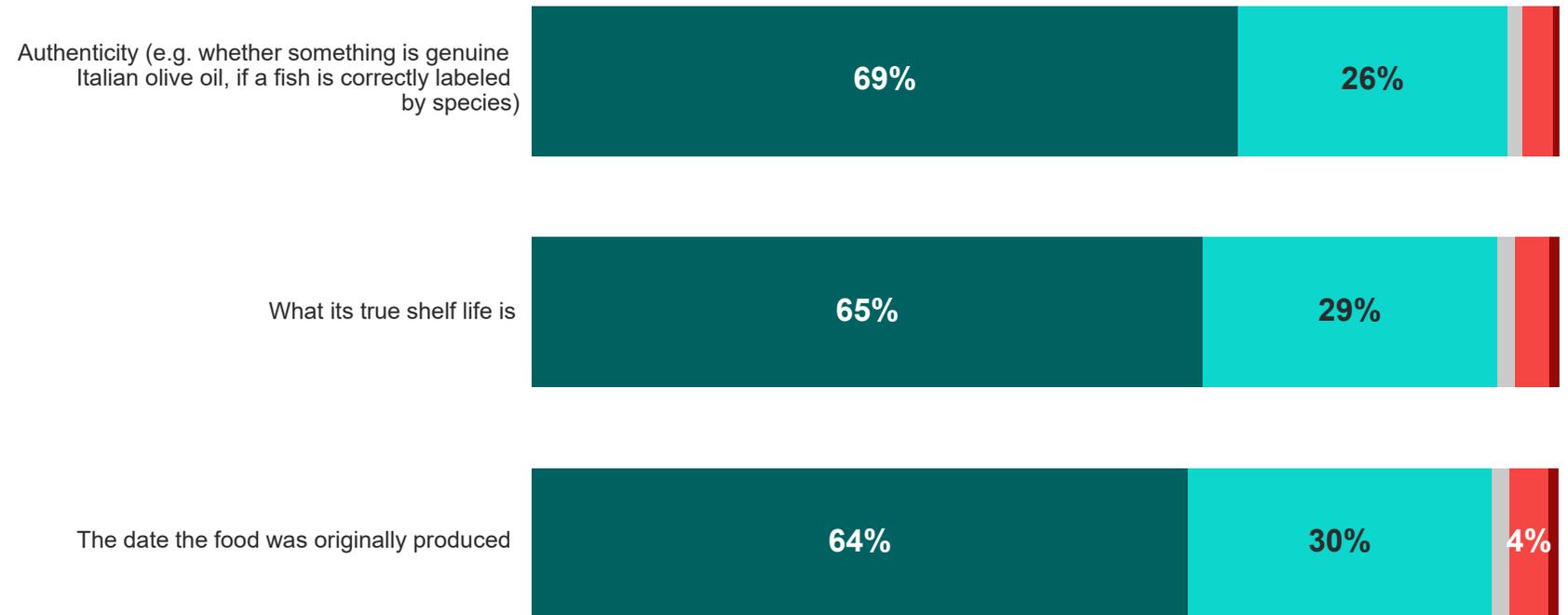
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Food Responsibility During the
Holidays

Over nine in ten Italian adults value information about a food's authenticity, true shelf life, and original production date.

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?

● Very valuable ● Somewhat valuable ● Don't know/Not applicable ● Not very valuable ● Not at all valuable



Blockchain and Food Provenance

Blockchain and Food Provenance

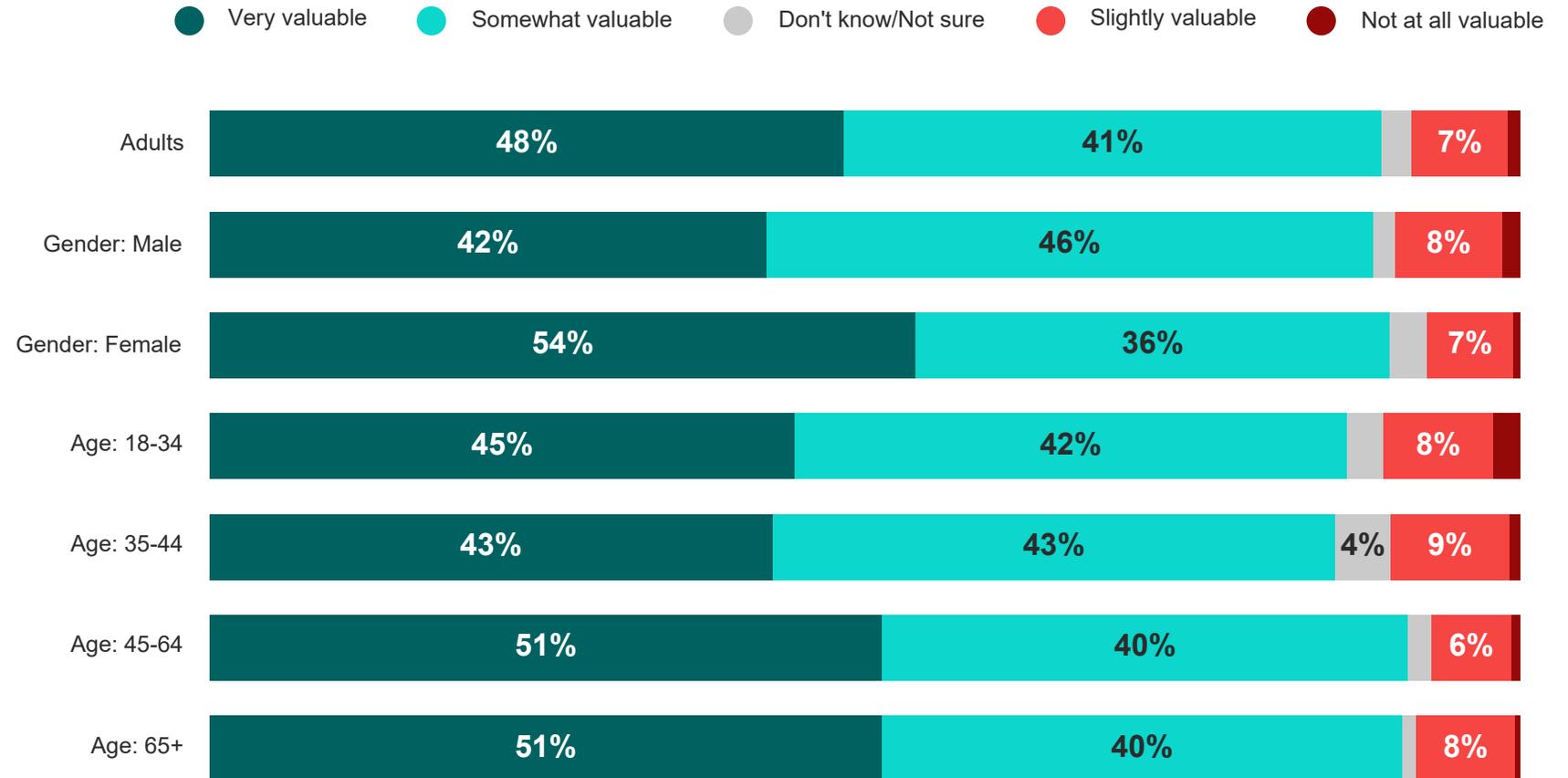
Men and women both overwhelmingly see all three information types asked about as valuable.

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?
[Showing % Very Valuable + Somewhat Valuable]



Nearly nine in ten (89%) Italian adults say that learning information about the farmers that grow their food is valuable. A majority (52%) of women say that it is very valuable.

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

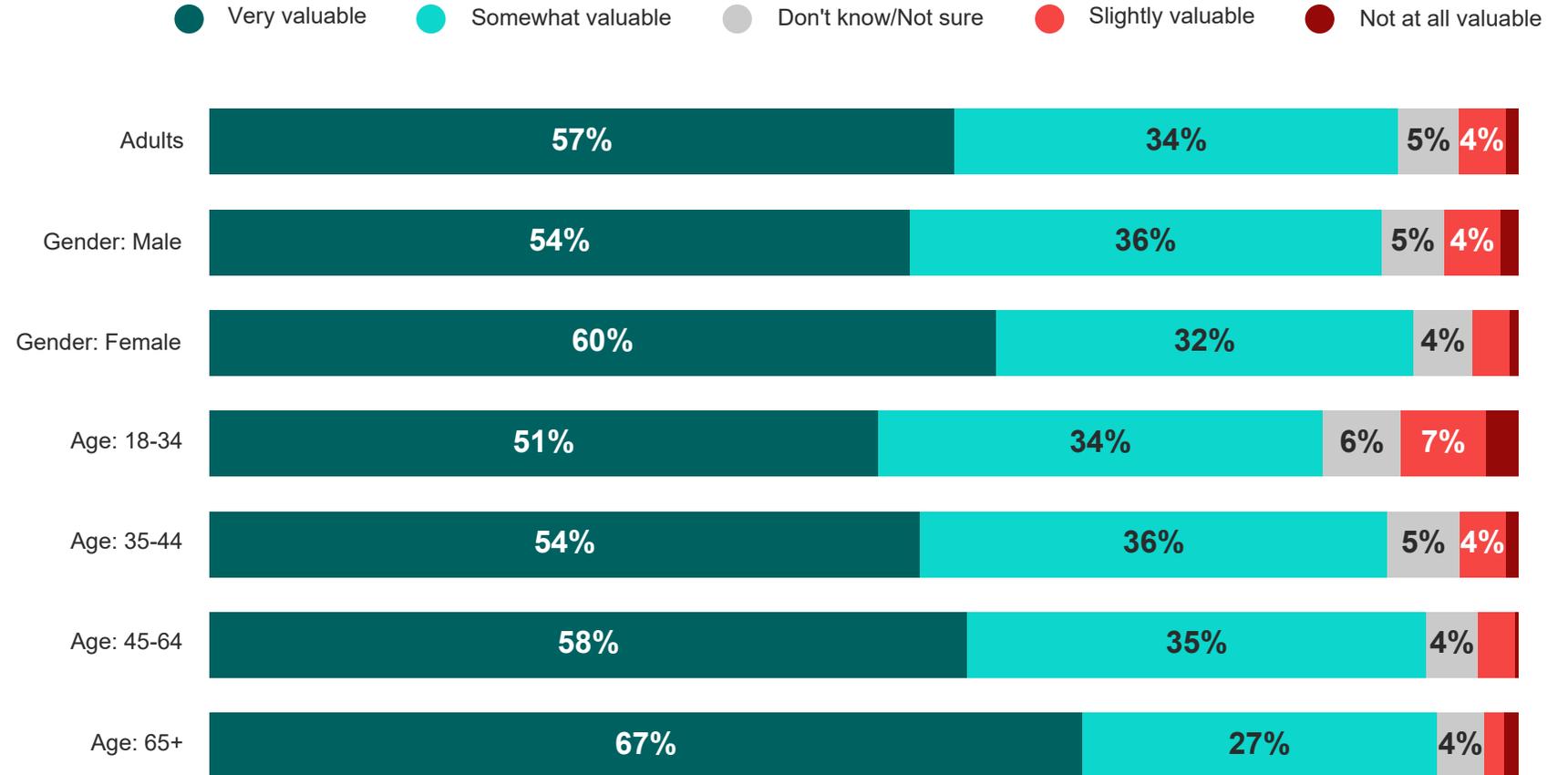


Blockchain and Food Provenance

Blockchain and Food Provenance

Over half (57%) of Italian adults say that having food be traceable on blockchain is “very valuable”.

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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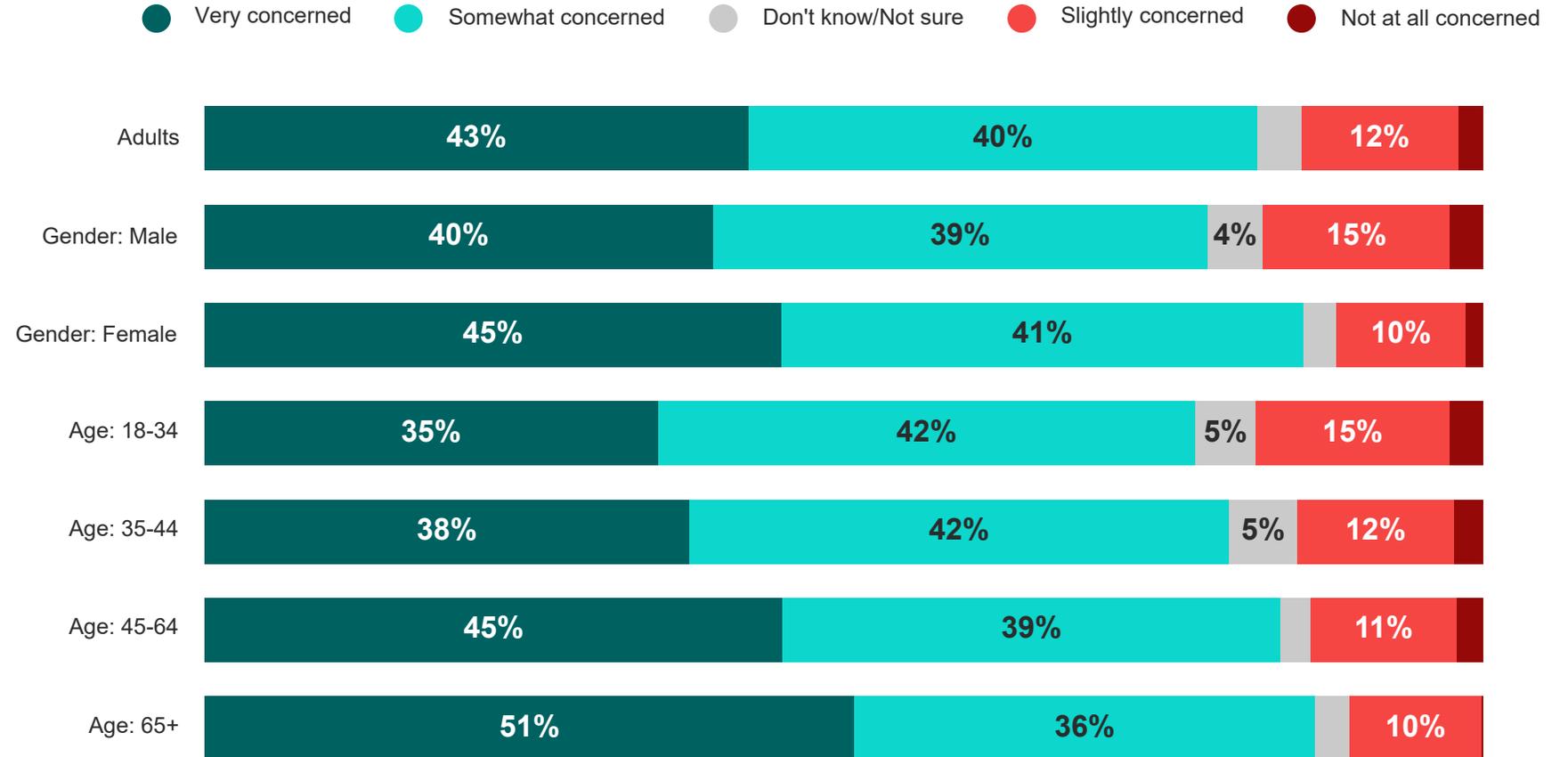
Soil Degradation



**Food Responsibility During the
Holidays**

Eight in ten (83%) Italian adults are concerned about soil degradation, with women being slightly more concerned than men.

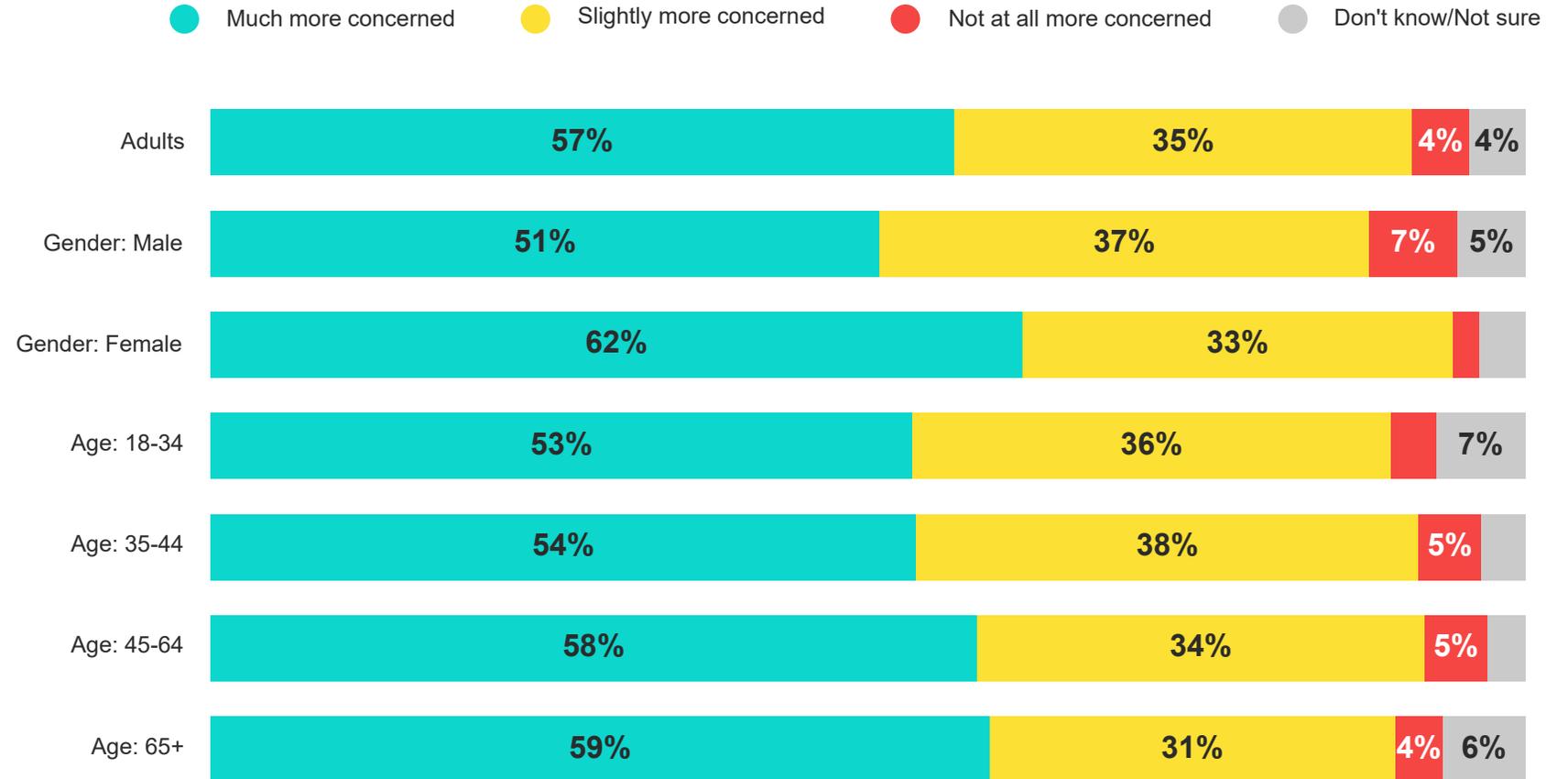
How concerned are you about soil degradation?



Soil Degradation

After learning about the impact of non-sustainable agricultural practices on soil degradation, a majority (57%) of Italian adults are much more concerned than they were previously, with another 35% slightly more concerned.

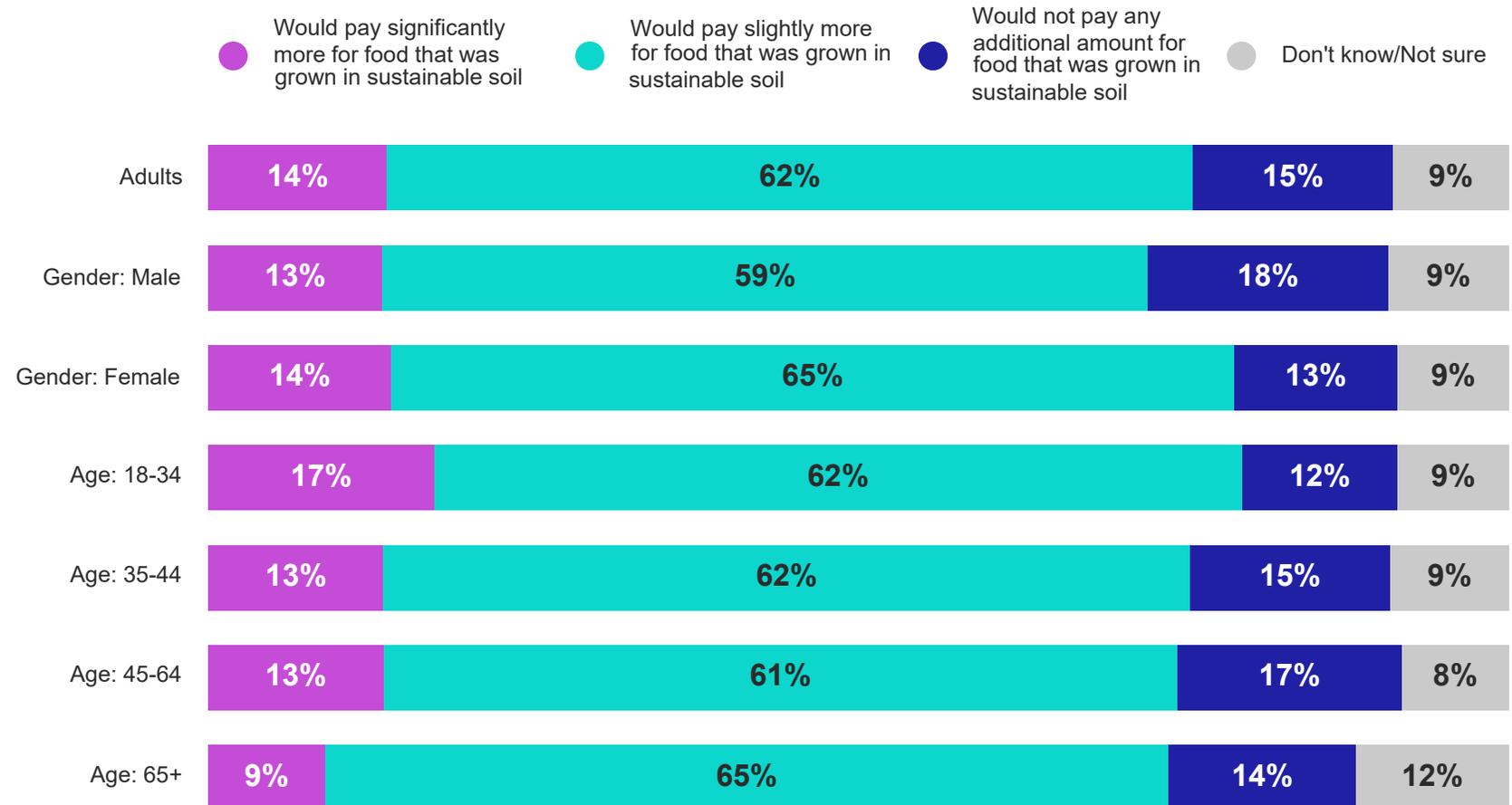
Non-sustainable agricultural practices can degrade the quality of soil and prevent land from supporting crops. Some estimates suggest that if soil degradation continues at its current pace, it will be exhausted by 2060. Given this information, are you more concerned about soil degradation than you were previously?



Soil Degradation

Around three in five (62%) Italian adults would consider paying slightly more for food grown in sustainable soil. Only 14% would pay significantly more.

Would you ever consider paying extra for food that was grown in 'sustainable soil'?



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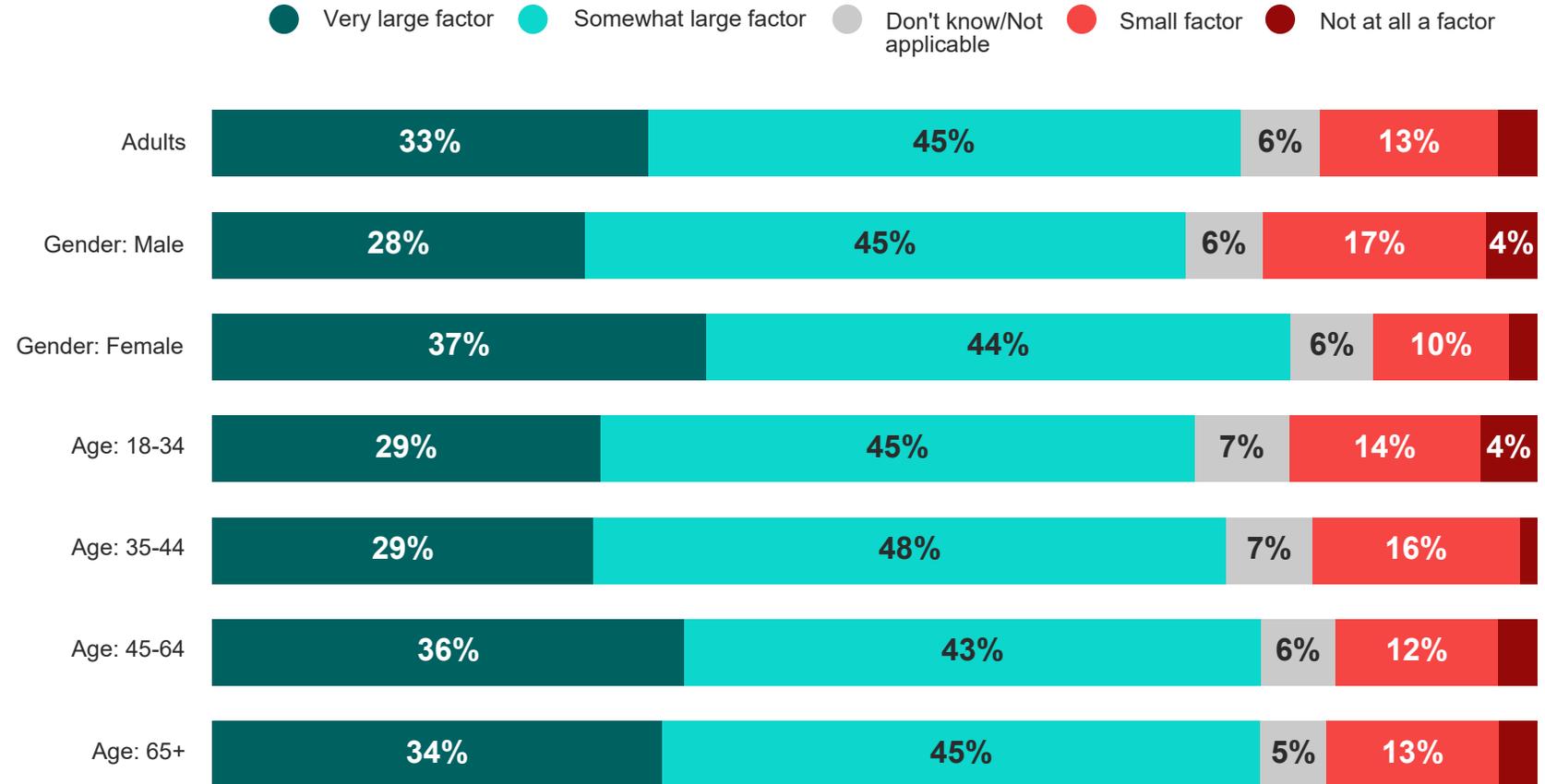


**Food Responsibility During the
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Food Responsibility During the Holidays

78% of Italian adults say environmental sustainability is a somewhat or very large factor when considering purchasing Christmas and other festive meal essentials. Women are more likely than men to make environmental sustainability a factor when making Christmas dinner purchases than men are by a margin of 8 points.

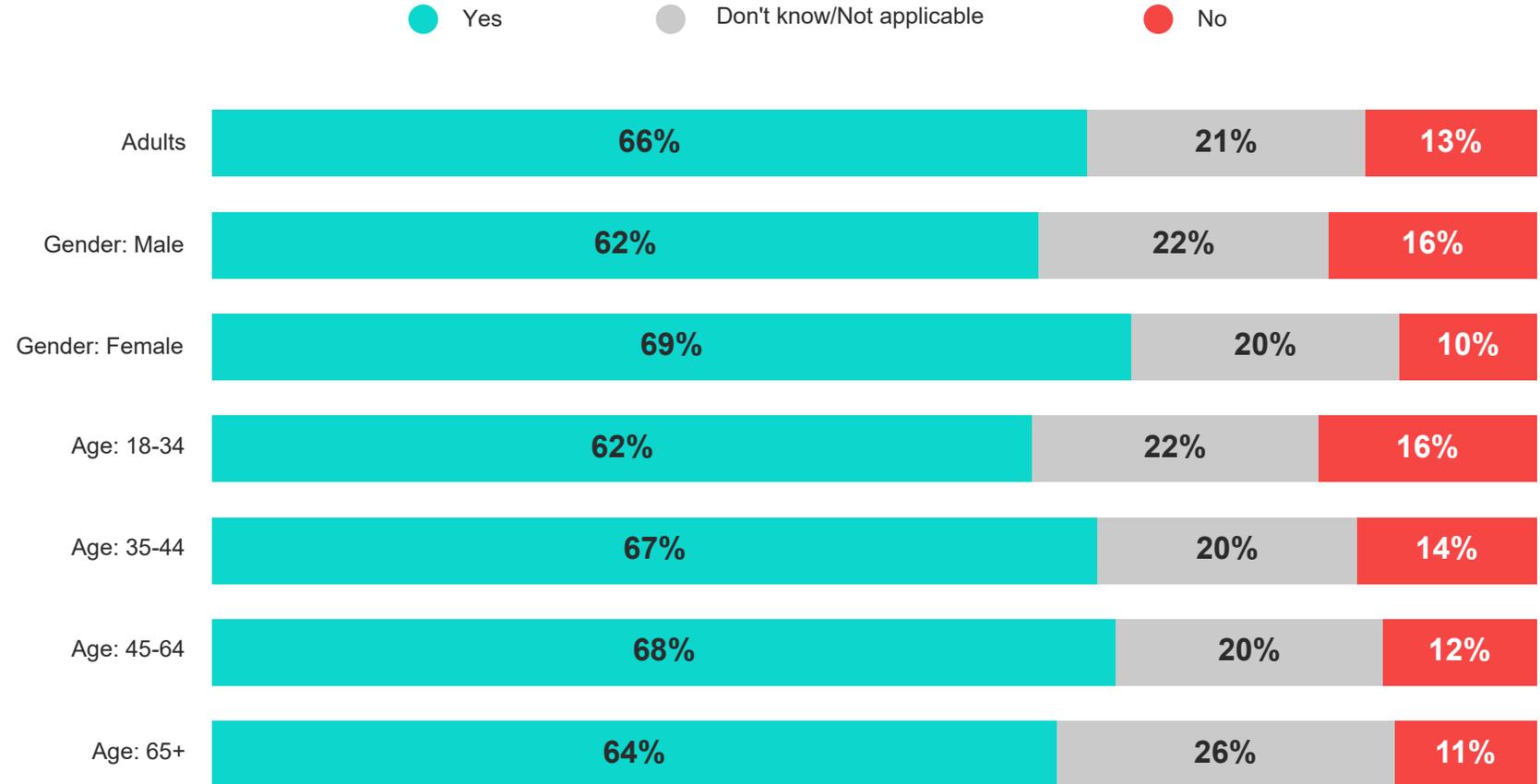
Thinking about the December holiday period, how much of a factor is environmental sustainability when it comes to purchasing your Christmas dinner or other festive meal essentials?



Food Responsibility During the Holidays

Two thirds (66%) of adults would consider changing the ingredients in their festive meals to be more sustainable.

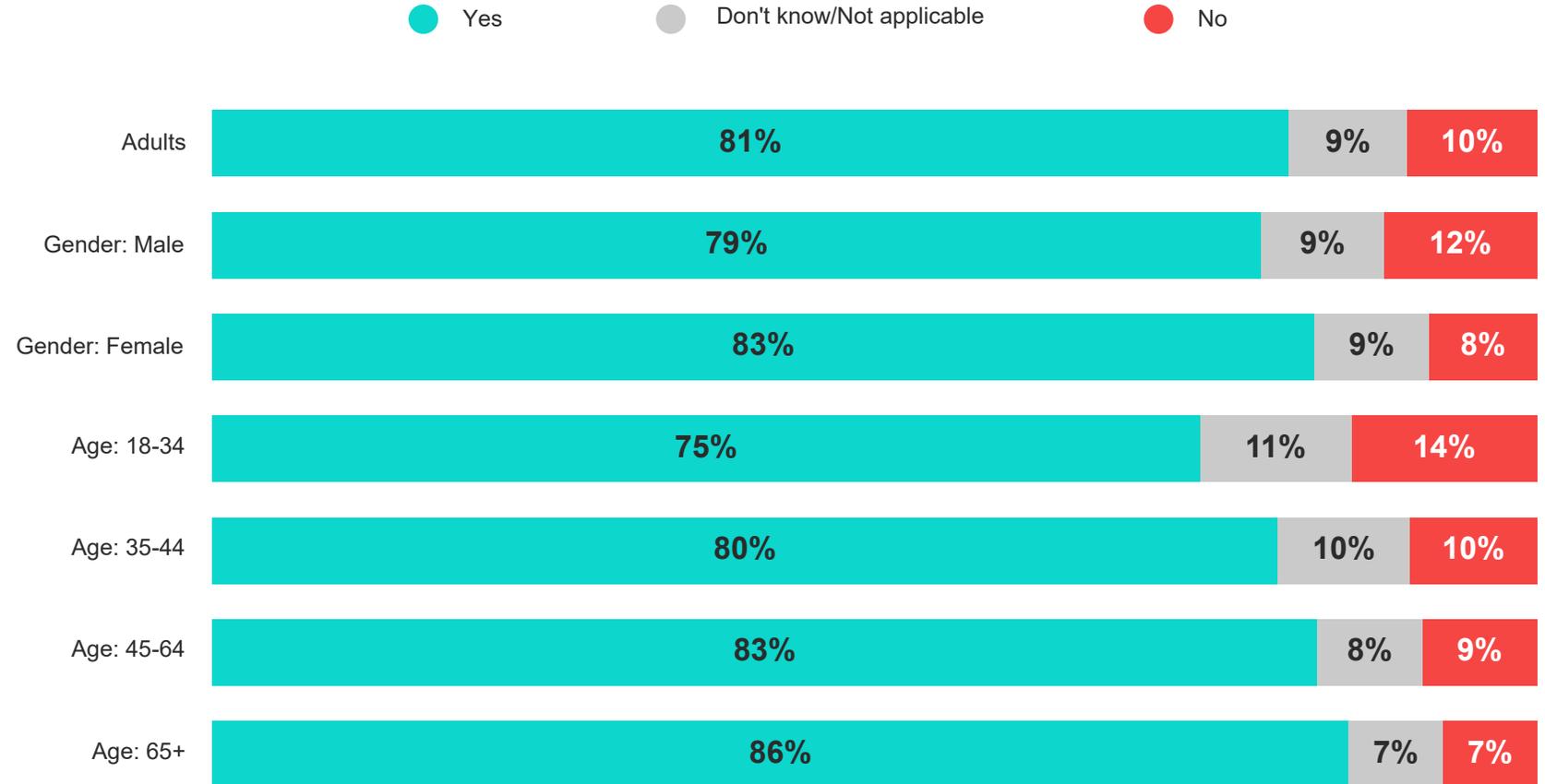
Would you consider changing the ingredients in your Christmas dinner or other festive meals to be more sustainable?



Food Responsibility During the Holidays

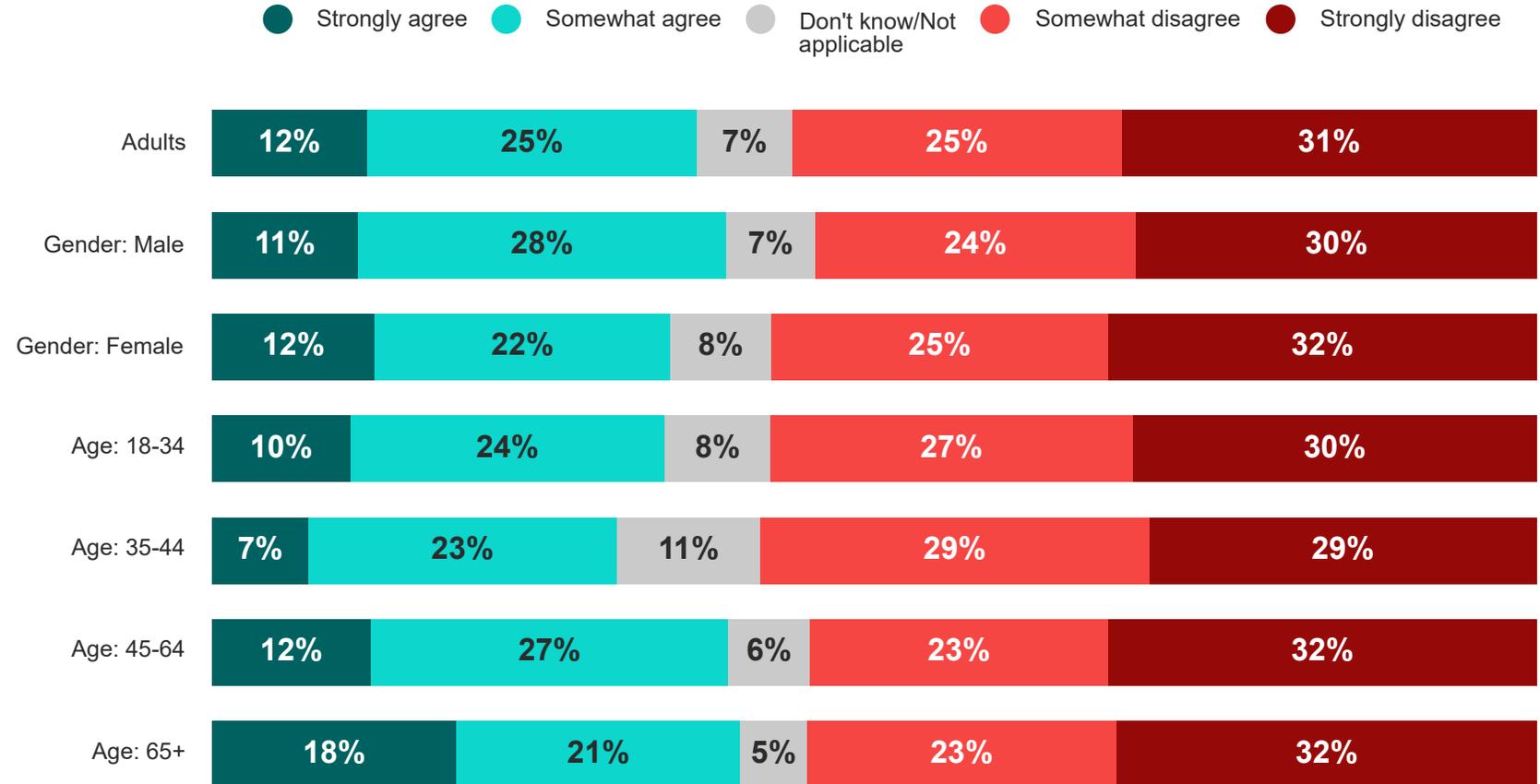
Eight in ten (81%) adults would like to know more about where the food they eat for Christmas dinner comes from. Older respondents are more likely than younger respondents to say they would like to know more.

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



A majority of respondents across gender and age say they are not more conscious about being environmentally friendly during the holidays compared to the rest of the year.

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.



Food Responsibility During the Holidays

 MORNING CONSULT