



MARKET
RESEARCH
WORLDWIDE

Global Eating, Drinking & Sustainability Survey

IRIS Multi-Country Study

September 2021

Introduction

- ▶ This study details the findings of a multi-country market research study, aimed to understand current eating and drinking trends around the world. The project aimed to understand:
 - the impact of COVID-19 on eating & drinking habits
 - if and how sustainability plays a role in deciding what to purchase
- ▶ Overall, 22 countries took part in this study, with all fieldwork undertaken online between 12th July and 18th August, 2021.
- ▶ A nationally representative sample of adults was interviewed in each country.

Participating Countries

Click on the logo of each company to learn more about them.

Australia  	Colombia  	Japan  	South Korea  
Austria  	Greece  	Nigeria  	Spain  
Bolivia  	India  	Panama  	Switzerland  
Bulgaria  	Indonesia  	Peru  	USA  
Chile  	Ireland  	Poland  	
China  	Italy  	Romania  	

The International Research Institutes (iris) network is present in 33 countries, and works together regularly on syndicated projects, as well as developing joint projects on areas of common interest. Visit irisnetwork.org to learn more.

Contents

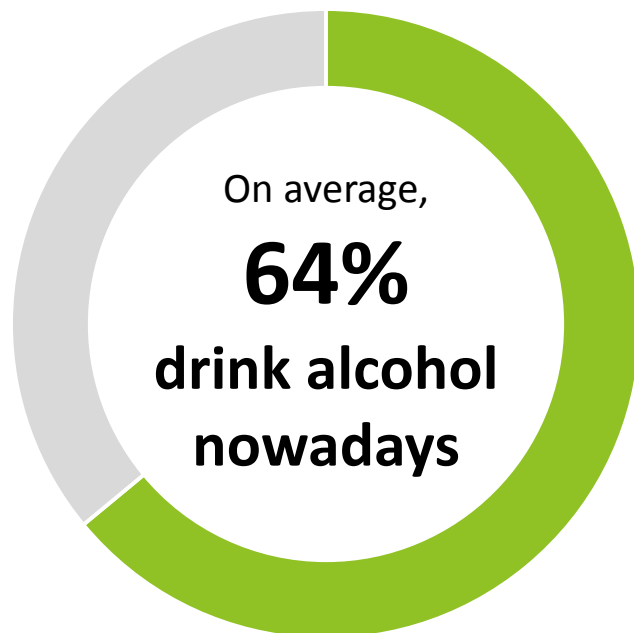
- 1 Socialising Habits
- 2 Impact of COVID
- 3 Impact of Sustainability
- 4 Key themes



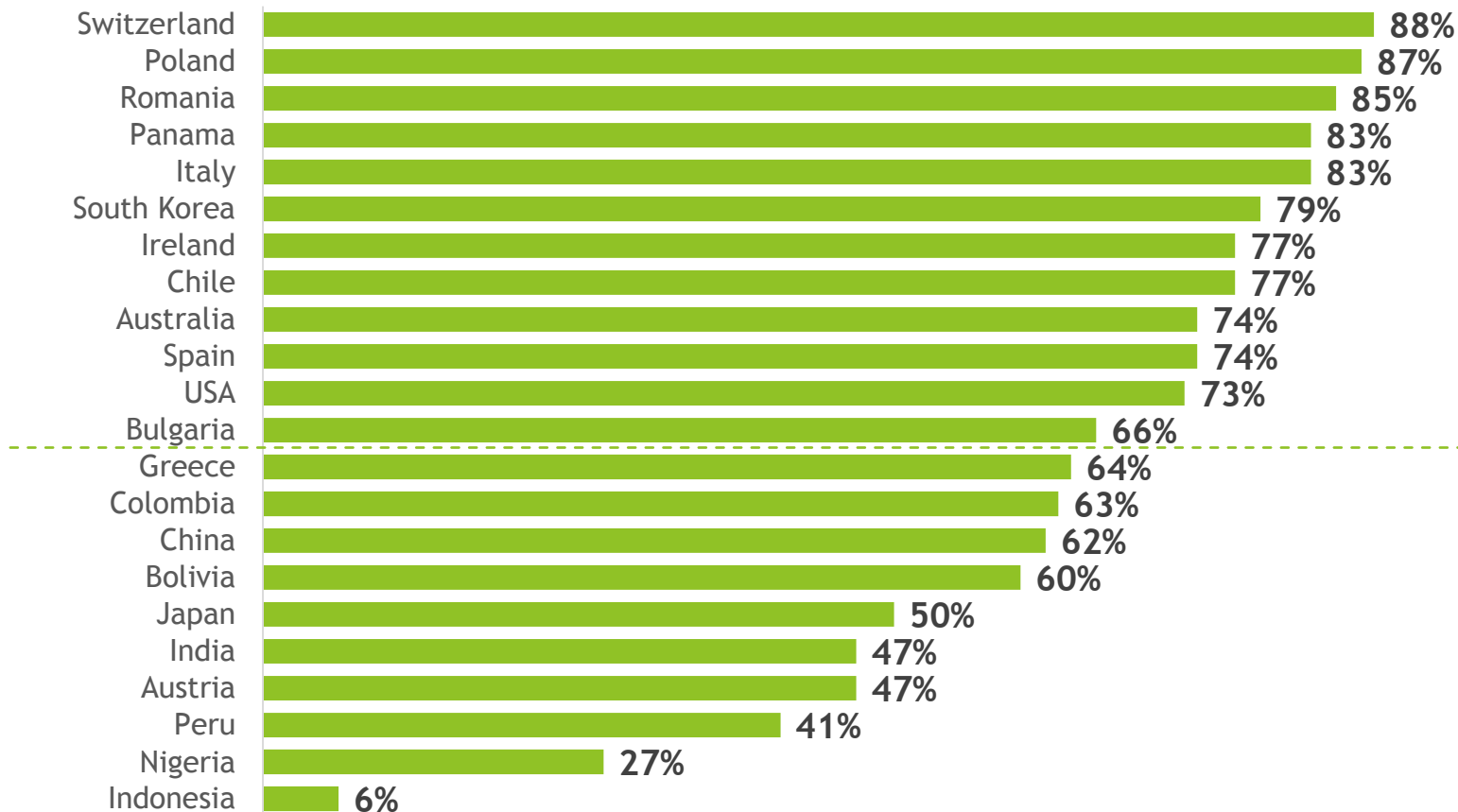
MARKET
RESEARCH
WORLDWIDE

1. Socialising Habits

Proportion of alcohol drinkers highest in Switzerland, Poland, Romania, Panama and Italy



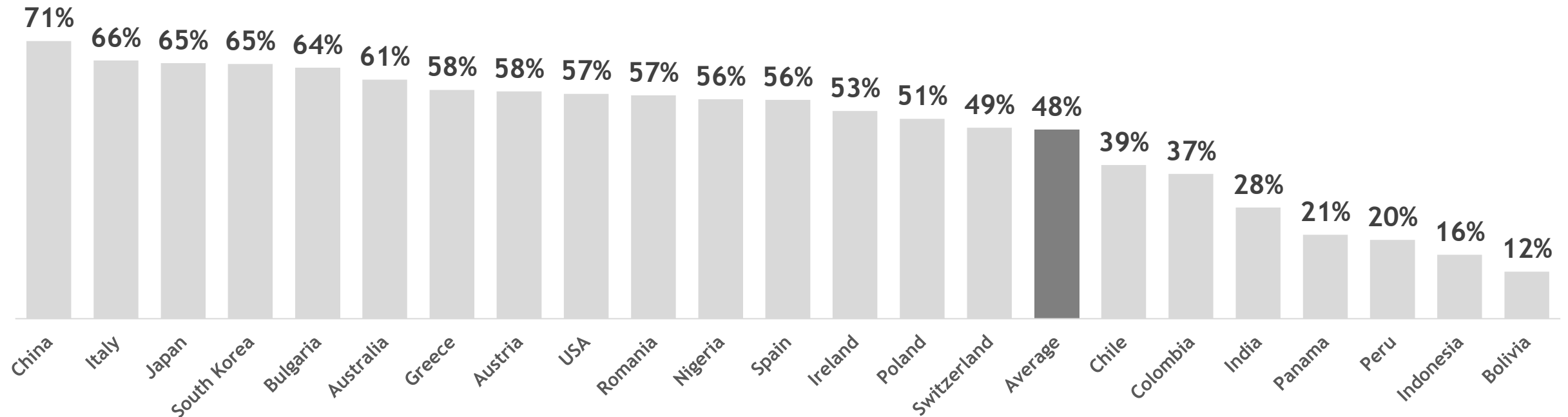
% drink alcohol nowadays



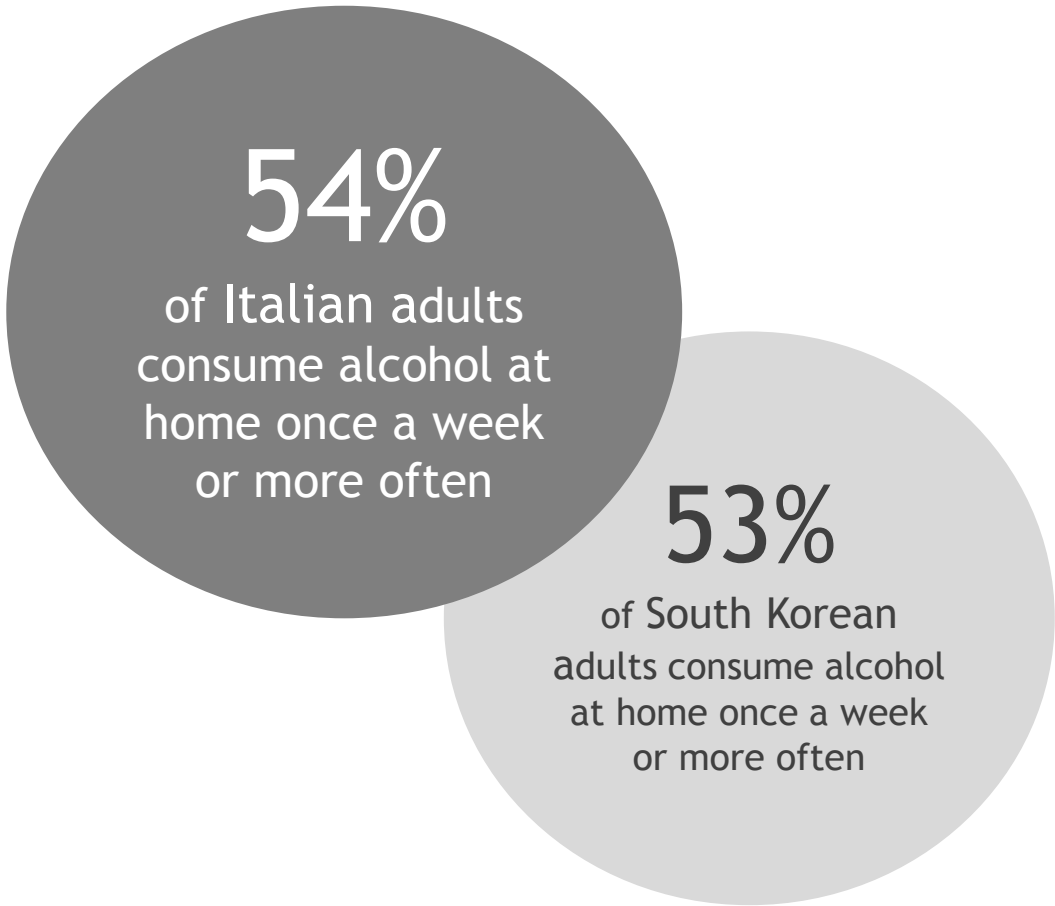
Those who consume alcohol in China are the most likely to drink alcohol at home weekly or more often. Meanwhile, although the Swiss have the highest proportion of alcohol drinkers, they are about average in terms of frequency of drinking at home.

Base: All drink alcohol in each country

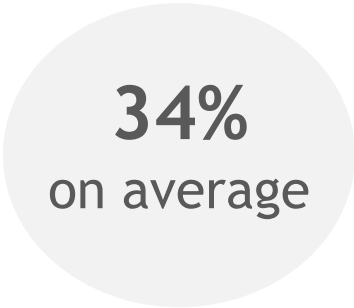
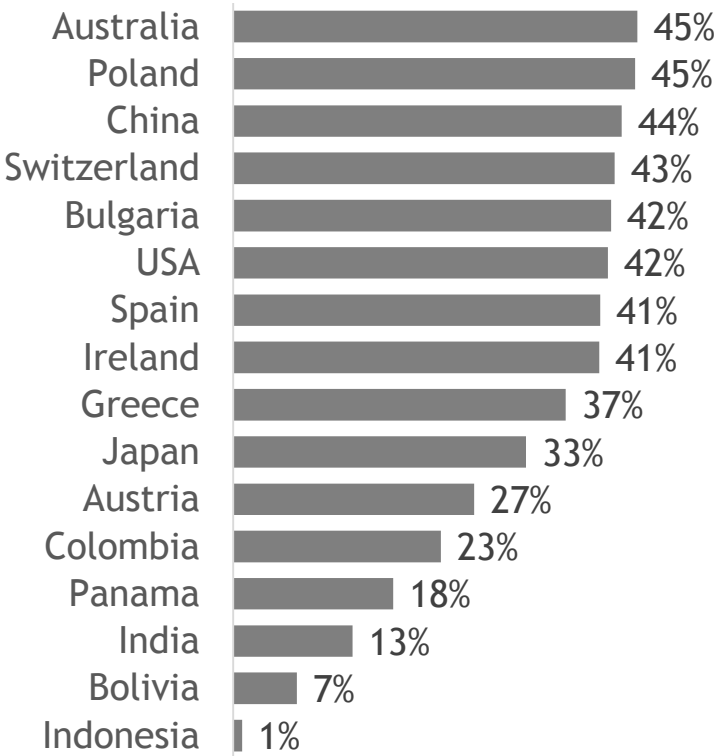
% of alcohol drinkers consuming alcohol weekly+ at home



Those in Italy and South Korea are the most likely to be drinking alcohol in the home on a weekly+ basis, as more than half of all adults in these countries would indicate they are doing so.



% all adults who drink alcohol at home once a week or more often



Q.1 Firstly, using the scale provided, could you please tell us how often, if at all, you do each of the following nowadays... Drink alcohol of any kind at home (including wine)

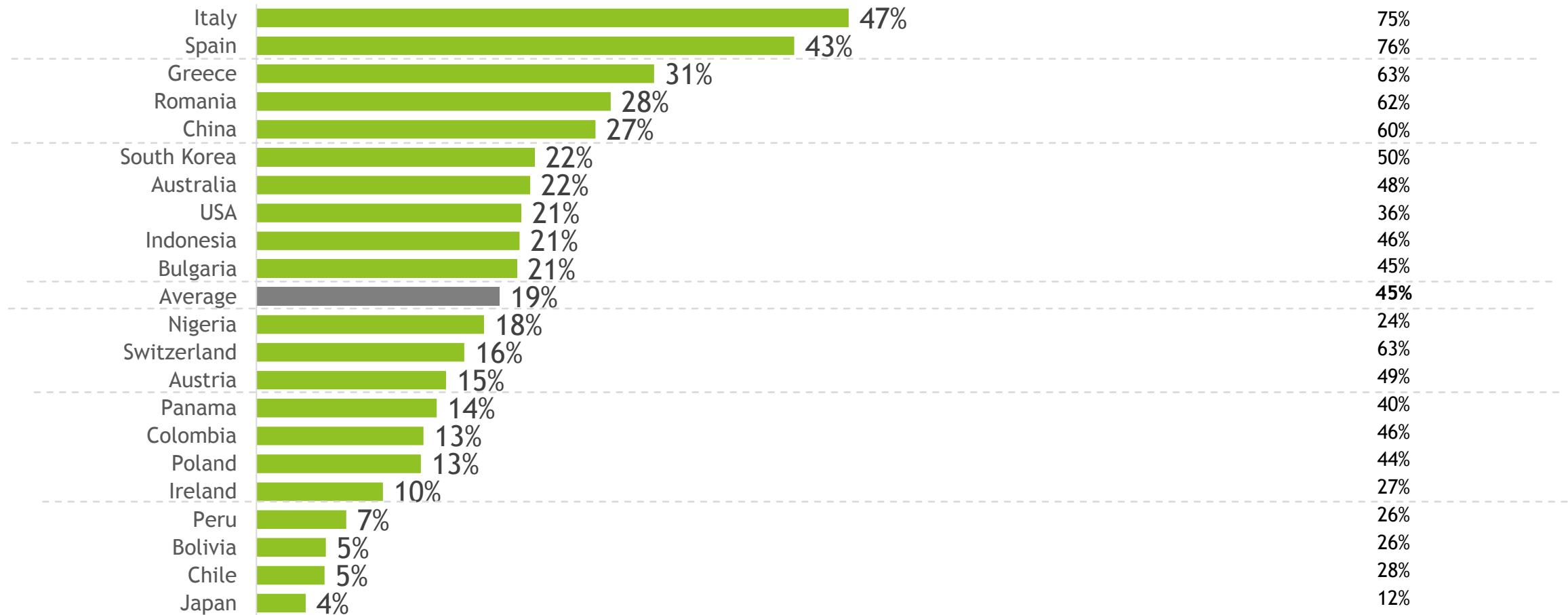
Almost half of Italians are visiting a pub, bar or café weekly or more often, with more than 2 in 5 Spanish people doing the same



MARKET
RESEARCH
WORLDWIDE

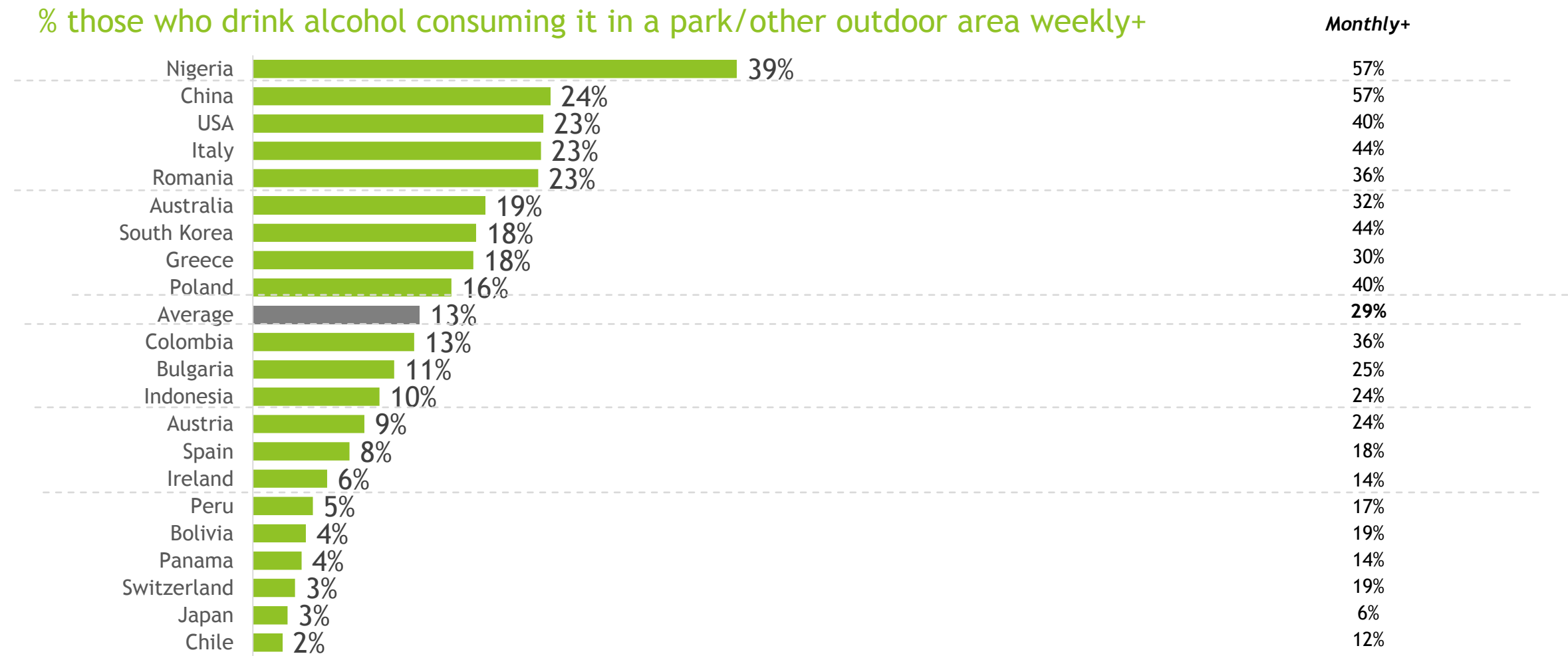
% Go out for a drink to a pub, bar or café weekly+

Monthly+



Please note, restrictions on indoor/outdoor dining differ from country to country.

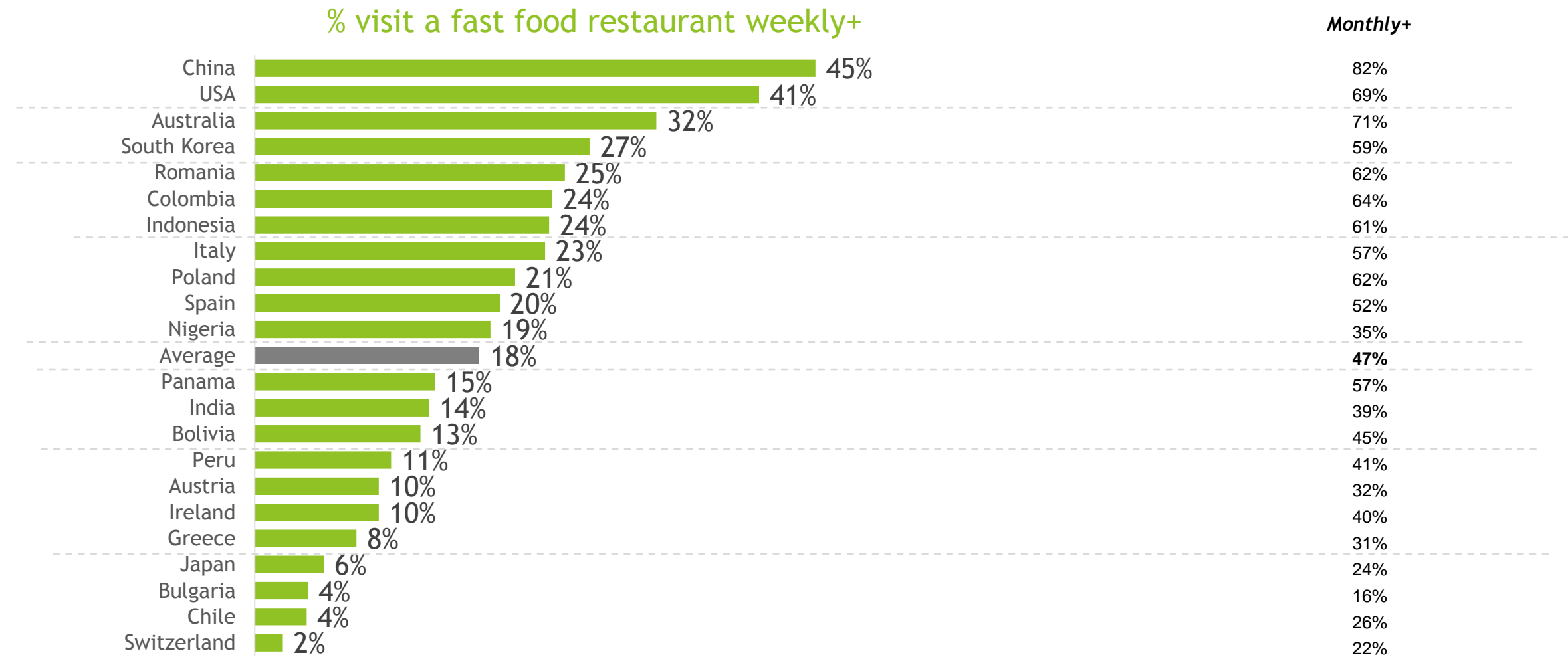
Those who drink alcohol in Nigeria are the most inclined to indicate they consume it in a park/other outdoor area once a week or more often, while 57% of Chinese adults who drink alcohol suggest they do so once a month or more often.




Please note, restrictions on indoor/outdoor dining differ from country to country.

Q.1 Firstly, using the scale provided, could you please tell us how often, if at all, you do each of the following nowadays... Drink alcohol of any kind in a park or other outdoor area (not including outdoor dining)

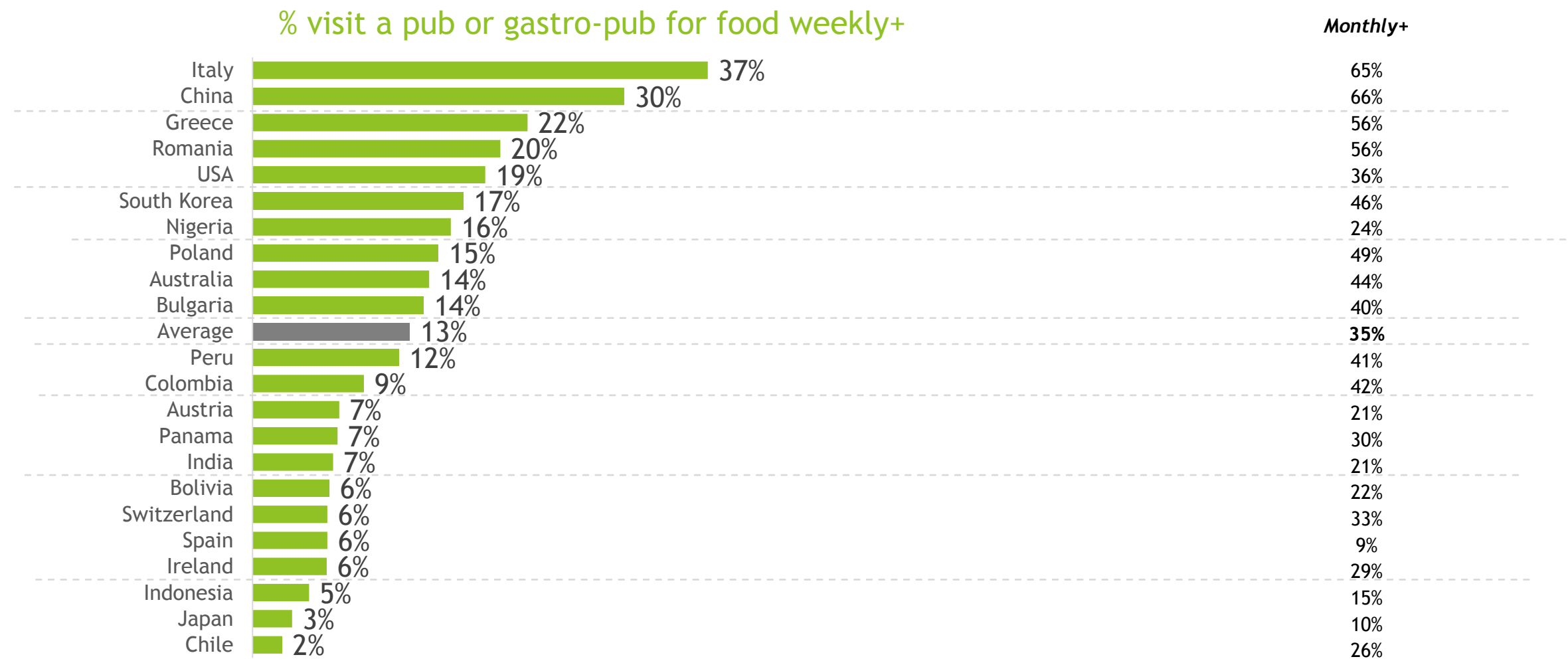
More than 2 in 5 adults in China and in the US indicate they visit a fast food restaurant once a week or more often, while 7 in 10 Australians visit at least once a month.



Please note, restrictions on indoor/outdoor dining differ from country to country.

 Q.1 Firstly, using the scale provided, could you please tell us how often, if at all, you do each of the following nowadays... Visit any fast-food restaurants like McDonalds, Burger King etc.

Two thirds of those in Italy and in China indicate they visit a pub or gastro-pub for food at least once a month.

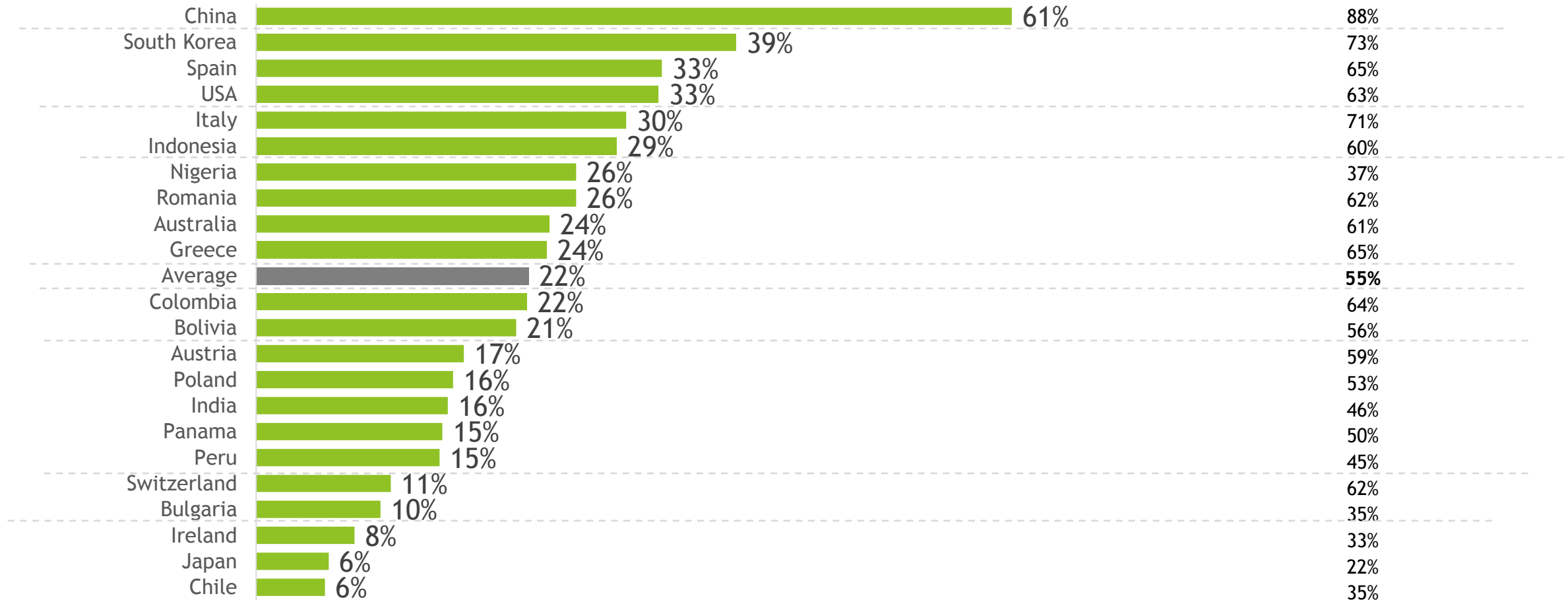


Please note, restrictions on indoor/outdoor dining differ from country to country.

More than 3 in 5 adults in China are visiting any other type of restaurant (likely more formal than fast food/gastro-pub) for food once a week or more often, with almost 9 in 10 visiting monthly+.

% visit any other type of restaurant for food weekly+

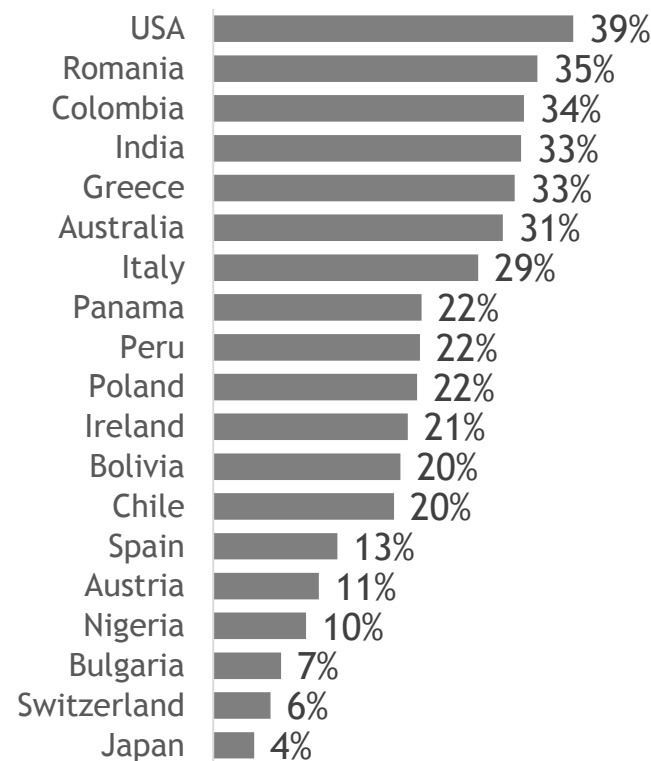
Monthly+



Please note, restrictions on indoor/outdoor dining differ from country to country.

7 in 10 Chinese adults are ordering food for home delivery once a week or more often, while 56% in Indonesia and 49% in South Korea would say the same

% order food for home delivery weekly+



27%
on average

72%
in China indicate
they order food
for home delivery
once a week or
more often

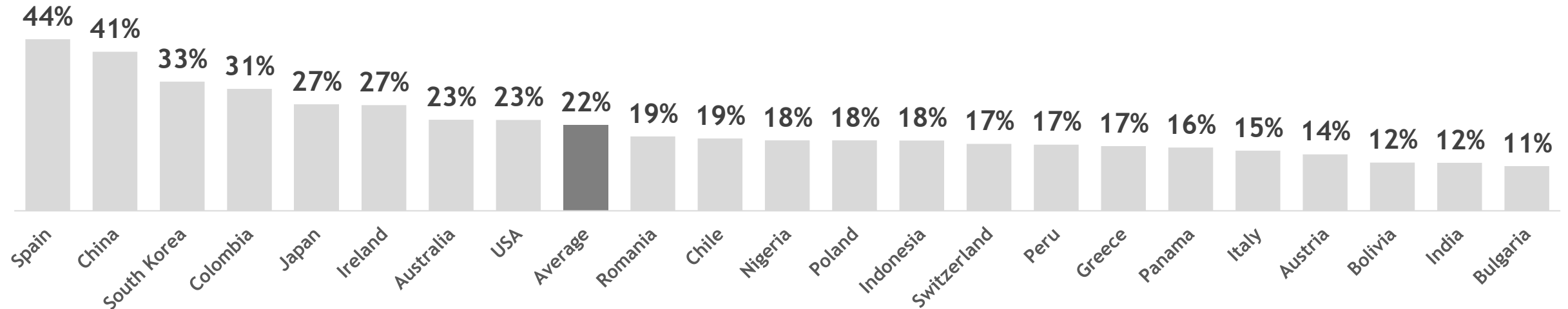
56%
in Indonesia

49%
in South
Korea

Those consuming alcohol at home in Spain or in China are the most likely to be doing so more often nowadays than they were two years ago. On average, a quarter of those drinking at home are doing so more often than they were pre-pandemic

Base: All who drink alcohol at home in each country

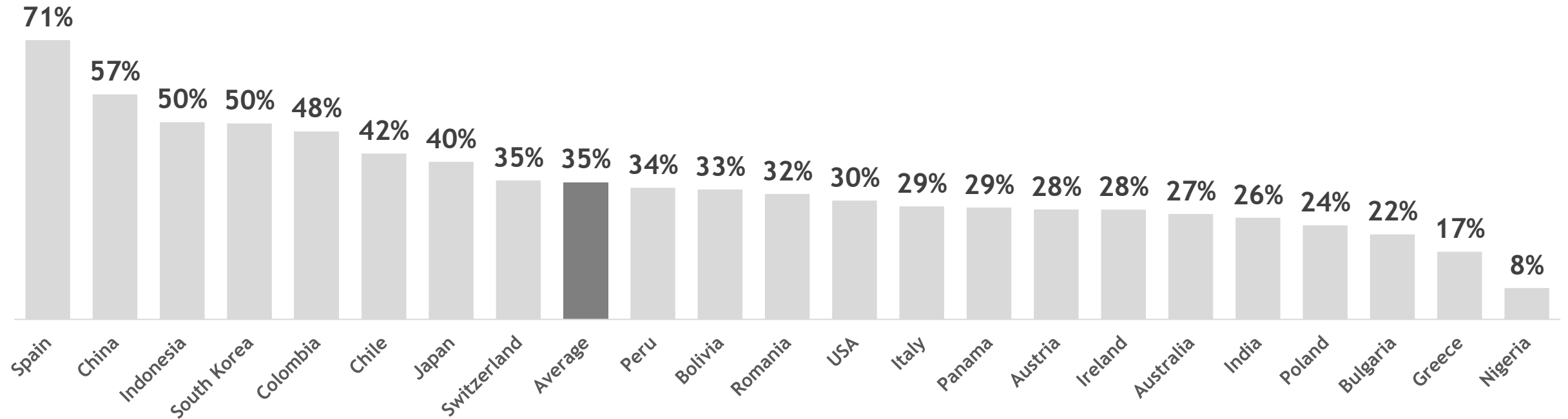
% drinking alcohol at home more often than two years ago



7 in 10 Spanish adults who order food for home delivery are doing so more often now than they were two years ago.

Base: All who order food for home delivery

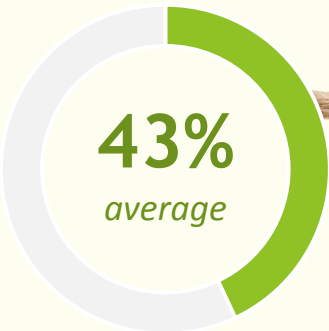
% ordering food for home delivery more often than two years ago



On average, more suggest they would stay home and cook a special meal to celebrate something rather than go to a restaurant

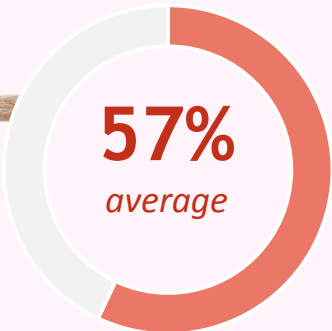
How would you celebrate something special?

Go to a restaurant for a meal



Higher in....	
Switzerland	66%
Austria	64%
Spain	62%
Italy	60%
South Korea	59%
Australia	58%
Ireland	56%

Cook special meal at home



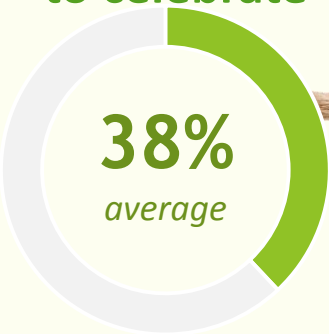
More Polarised Opinion	
% would go to restaurant	
USA	49%
Romania	49%
Japan	48%
Greece	45%
Poland	44%
Bulgaria	43%
China	42%

Higher in....	
Bolivia	88%
Chile	76%
Peru	75%
Panama	75%
India	73%
Nigeria	72%
Colombia	69%
Indonesia	66%

More than 3 in 5, on average, would invite family/friends to their home to celebrate a birthday, while 38% would go to a restaurant/bar

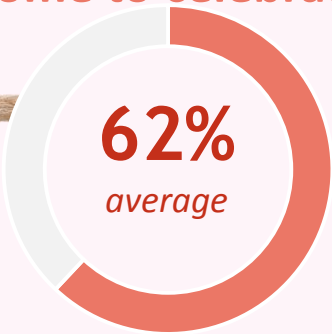
How would you celebrate your birthday?

Go to a restaurant/bar
to celebrate



Higher in....	
Spain	60%
Japan	63%
South Korea	64%

Invite family/friends to your
home to celebrate



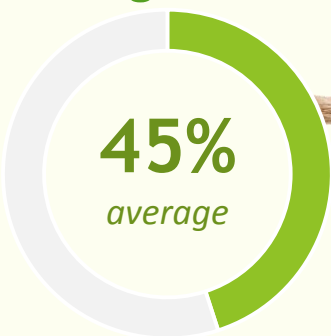
More Polarised Opinion	
% would go to restaurant/bar	
Greece	35%
China	39%
Austria	42%
Bulgaria	43%
Italy	44%
Romania	44%
Ireland	47%
Australia	49%
USA	49%

Higher in....	
Bolivia	87%
Chile	85%
Peru	75%
Poland	74%
Nigeria	73%
Indonesia	73%
Switzerland	69%
India	68%
Colombia	67%

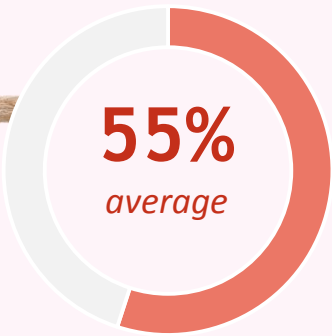
Just over half, on average, indicate they would spend quality time with family by having a meal at home together: rises to three quarters in Japan, Bolivia and Nigeria

How would you spend quality time with your family?

Go on a day trip
together



Have a meal at home
together

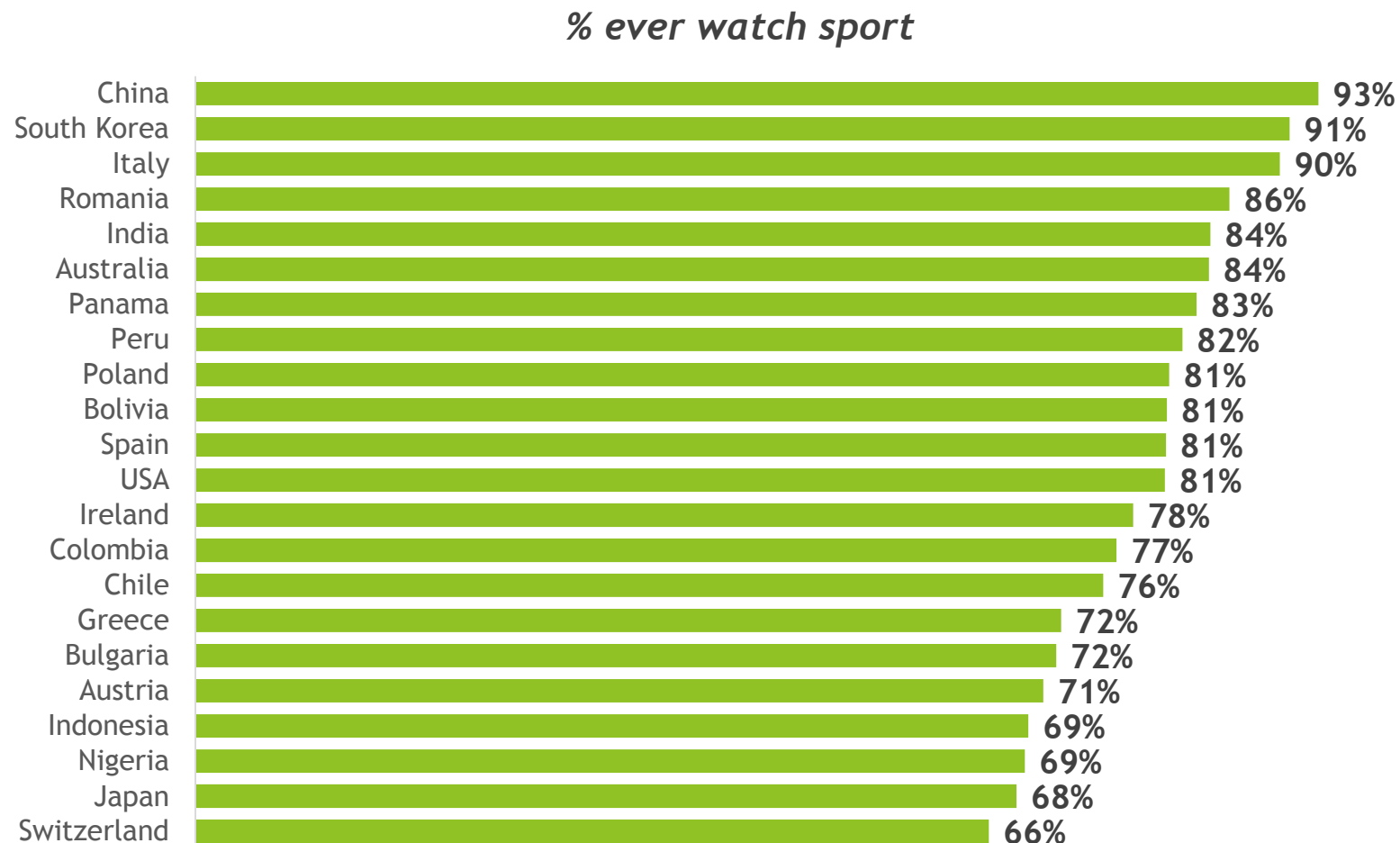
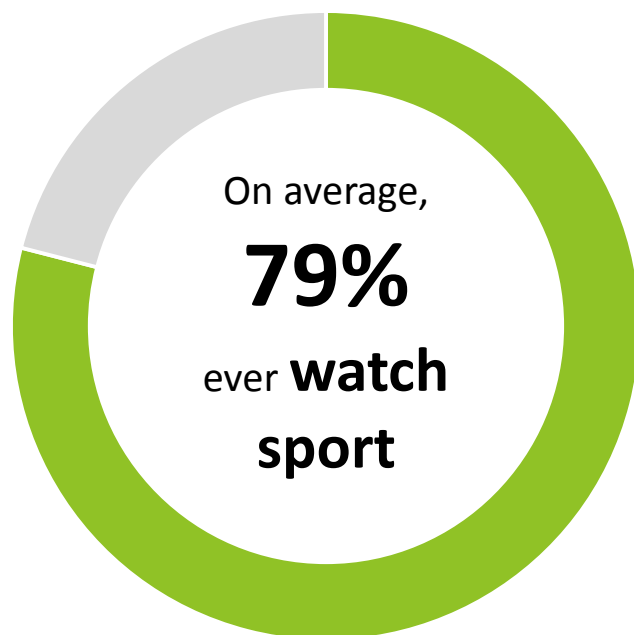


Higher in....	
Spain	83%
Romania	68%
South Korea	58%
Greece	56%
Italy	54%
Switzerland	53%
Austria	50%

More Polarised Opinion	
% would go on a day trip together	
China	49%
Indonesia	47%
Poland	45%
Colombia	44%
Ireland	43%

Higher in....	
Japan	76%
Bolivia	75%
Nigeria	73%
USA	67%
Australia	66%
Bulgaria	63%
India	63%
Chile	62%
Peru	62%
Panama	60%

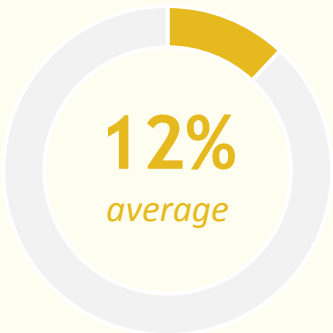
Incidence of watching sport is lowest in Switzerland, Japan, Nigeria and Austria (although still at least two thirds in these countries ever do so)



On average, over half would watch a sporting event at home, while 1 in 9 would watch it at a sports bar or venue (rising to 3 in 10 in Spain and 28% in Romania)

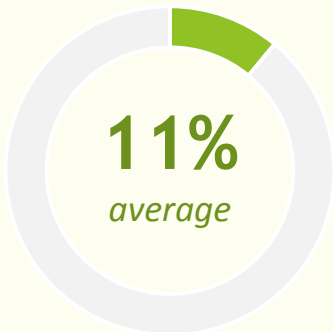
How would you watch a sporting event?

Attend the sports event
in person



Higher among....	
South Korea	31%
Switzerland	21%
China	17%
Poland	17%

Watch it at a sports
bar/other venue



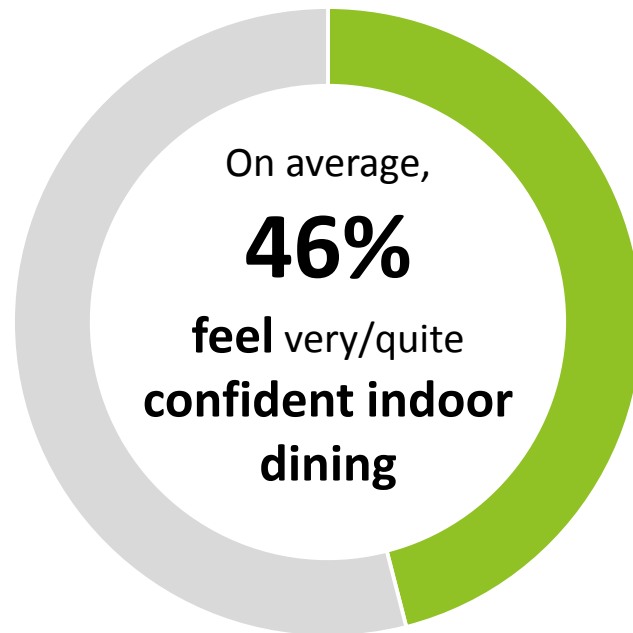
Higher among....	
Spain	30%
Romania	28%
China	23%
Nigeria	20%

Watch it at home

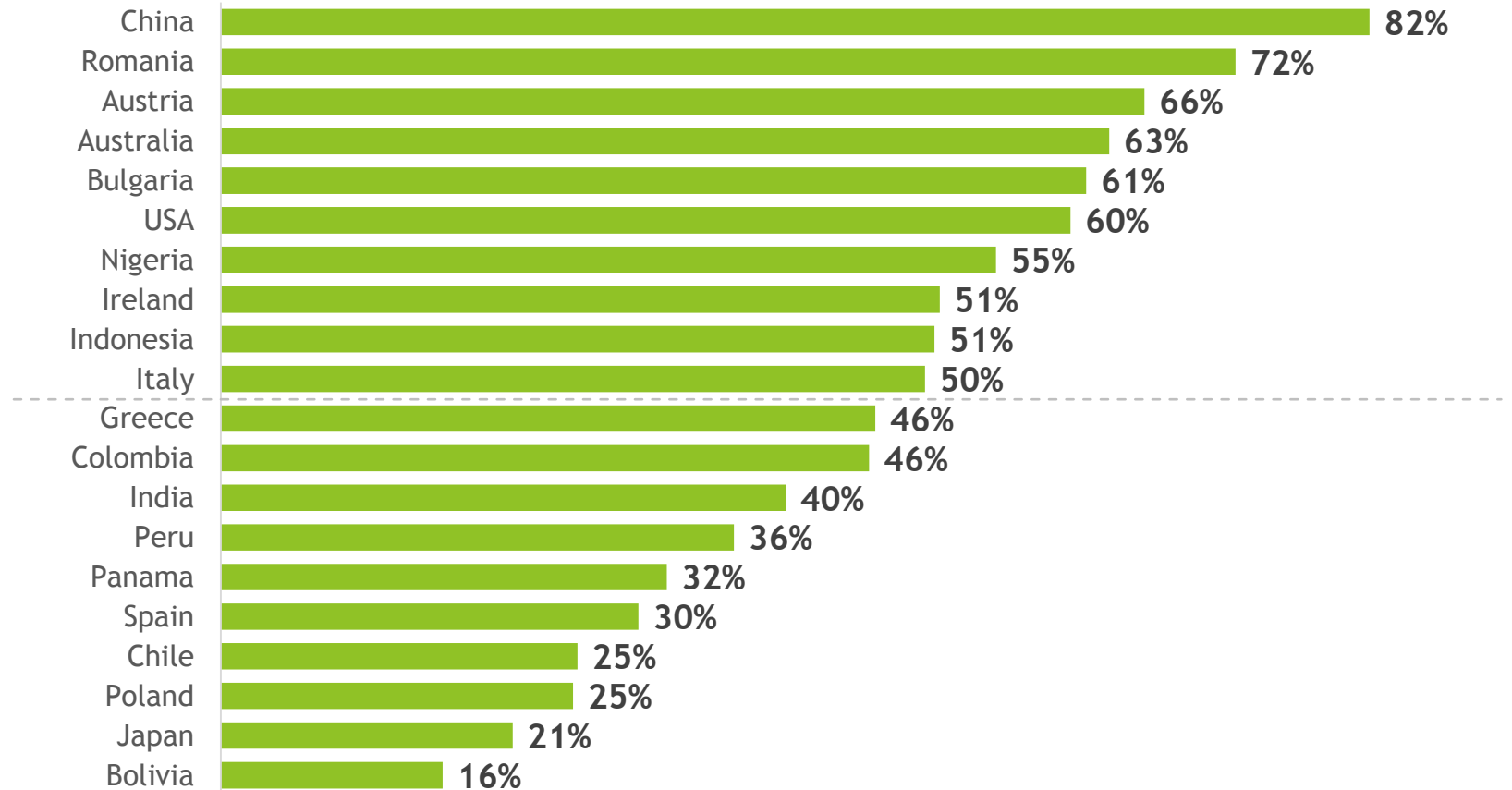


Higher among....	
Peru	71%
Bolivia	71%
India	69%
Panama	67%
USA	65%
Colombia	63%
Italy	62%
Australia	62%
Chile	61%
Ireland	60%

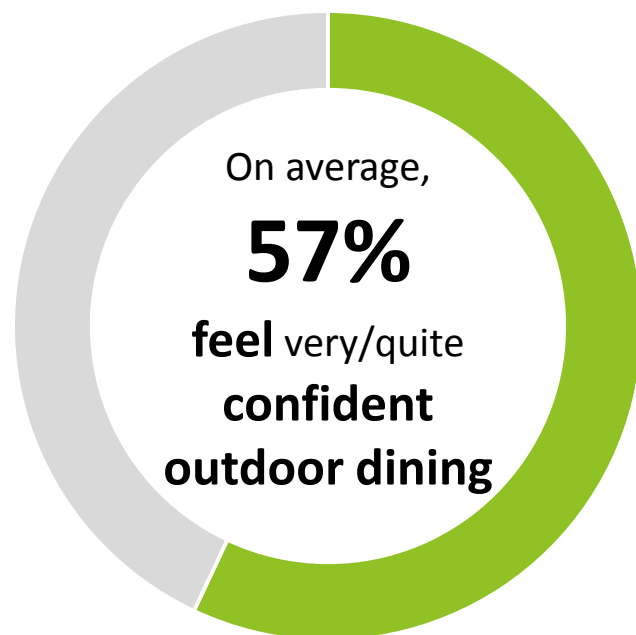
Confidence in indoor dining is highest in China and Romania, while weakest in Bolivia and Japan



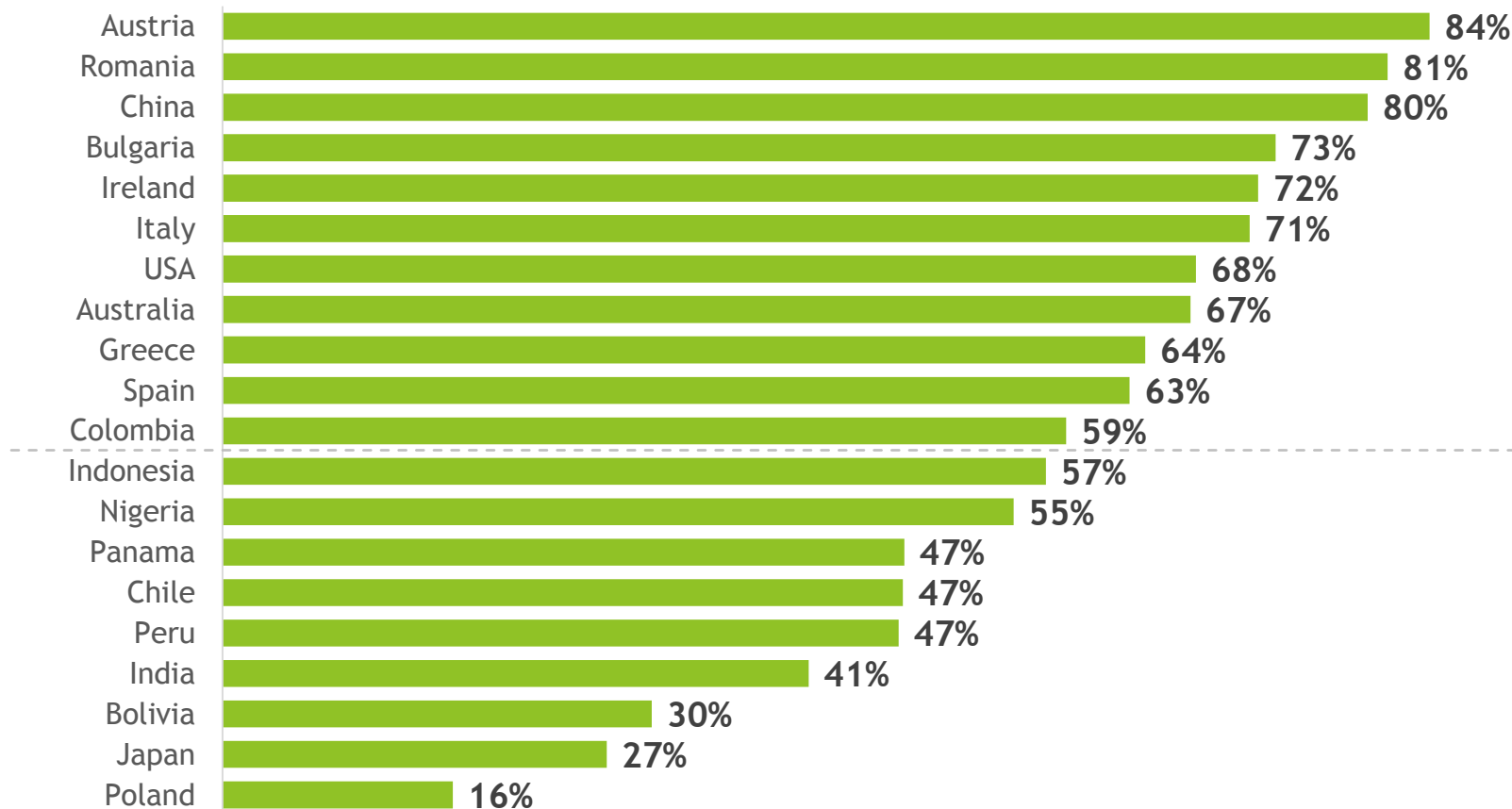
% confident going to a restaurant/bar or other venue for a meal or a drink and sitting indoors (i.e. indoor dining)



Confidence in indoor dining is highest in China and Romania, while weakest in Bolivia and Japan



% confident going to a restaurant/bar or other venue for a meal or a drink and sitting outdoors (i.e. outdoor dining)



On average, confidence is higher in outdoor dining than indoor dining. Those in China are the most confident in indoor dining, while those in Austria are the most confident in outdoor dining

Confidence in Indoor vs. Outdoor Dining

Indoor dining



Highest in...	
China	82%
Romania	72%
Austria	66%
Australia	63%
Bulgaria	61%
USA	60%

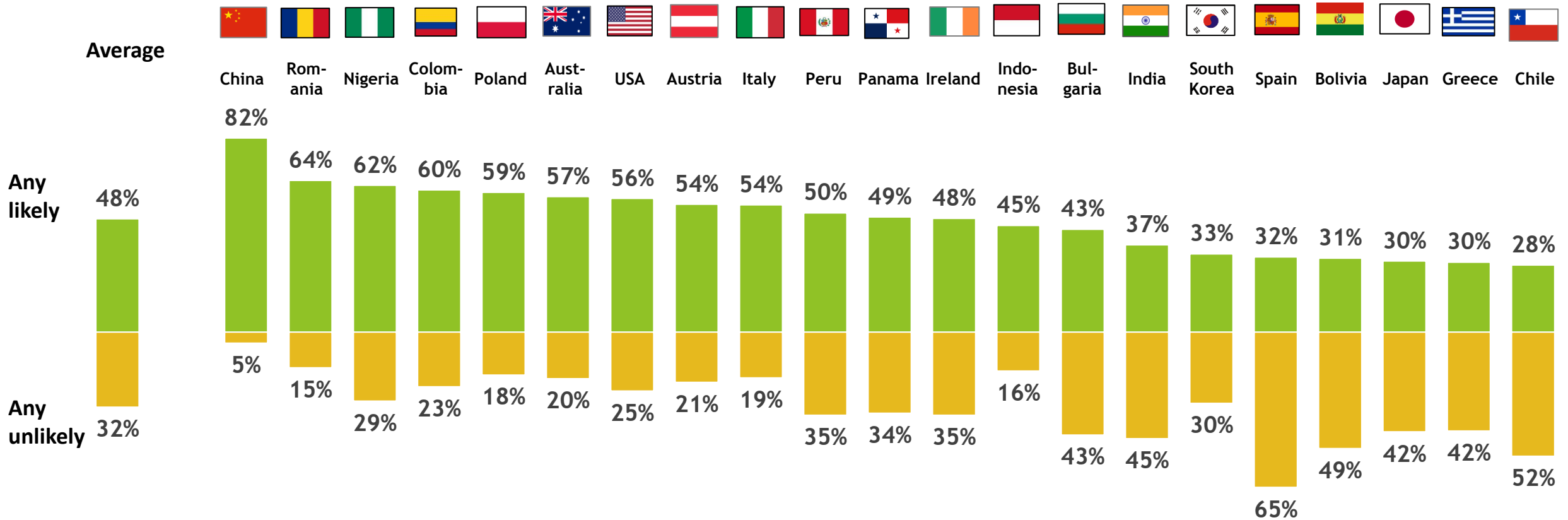
Outdoor dining



Highest in....	
Austria	84%
Romania	81%
China	80%
Bulgaria	73%
Ireland	72%
Italy	71%
USA	68%
Australia	67%
Greece	64%
Spain	63%

Those in China are the most likely to suggest they will be going for indoor dining, whereas those in Spain are the most inclined to suggest they are unlikely to do so

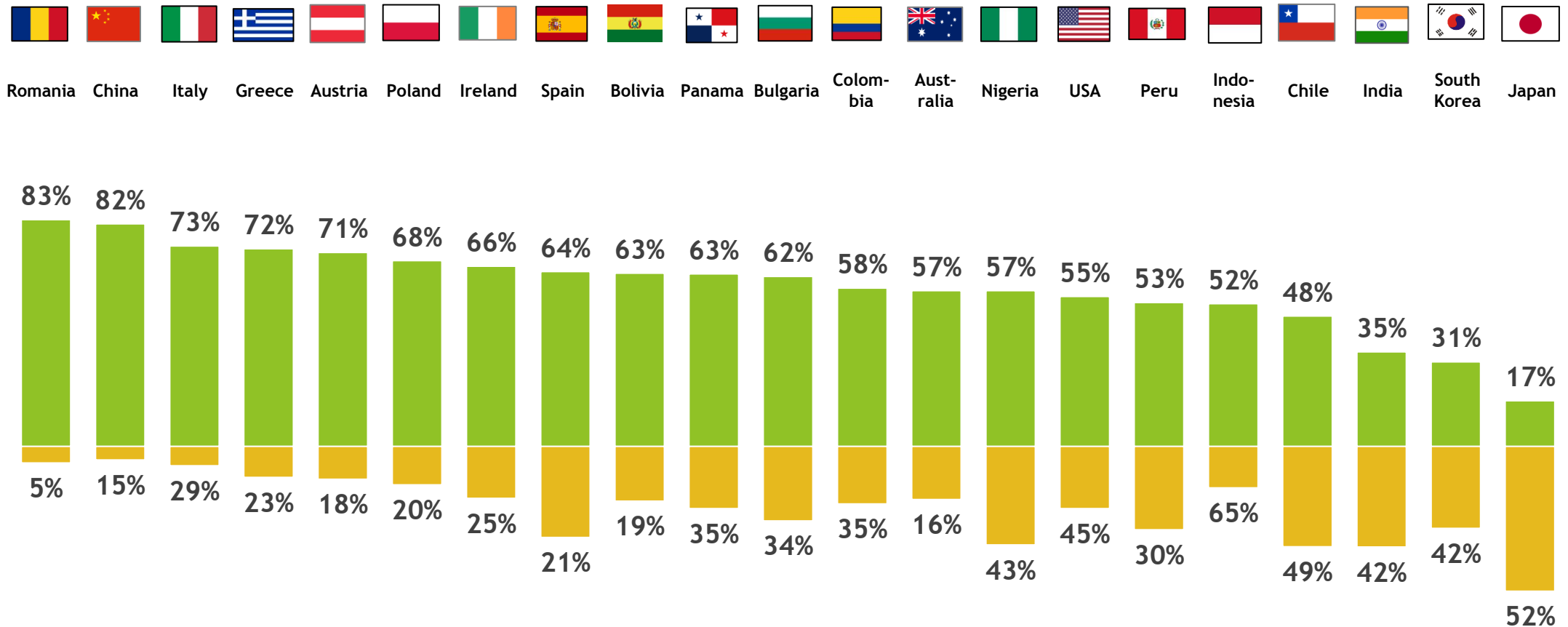
Go out for indoor dining over next three months (July-September)



On average, 3 in 5 indicate they are likely to go for outdoor dining over the next three months, rising to 4 in 5 in Romania and in China

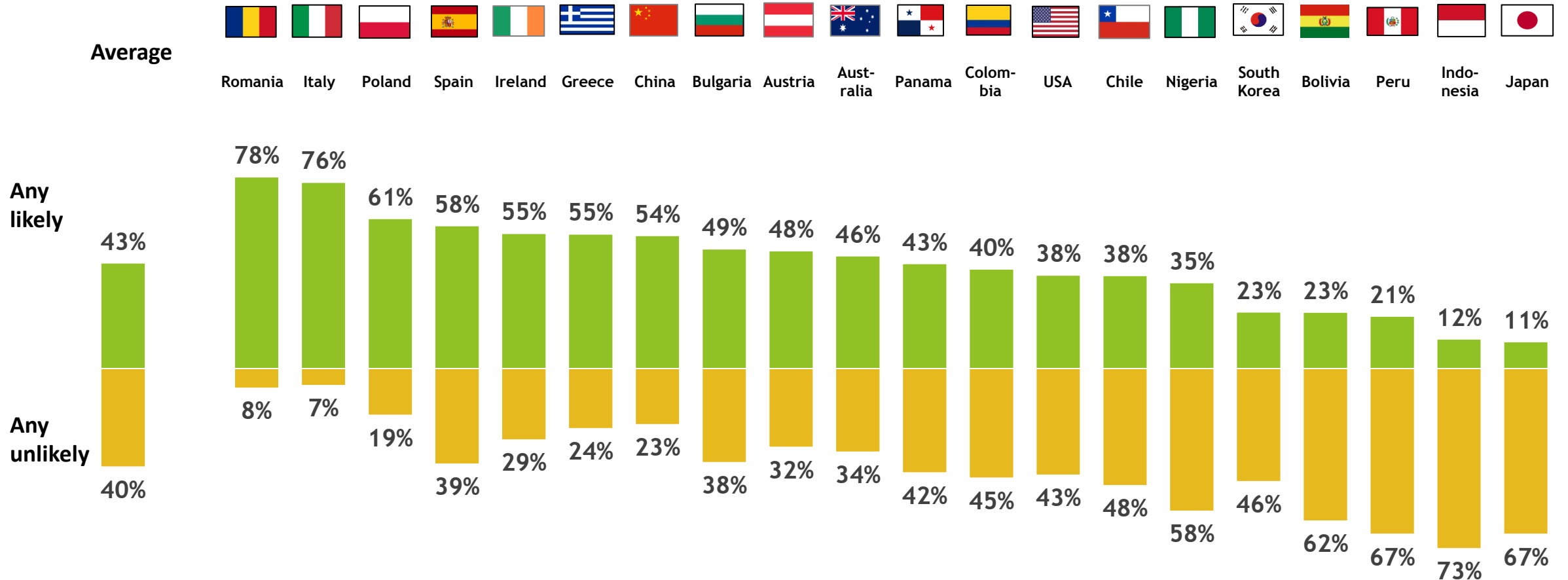
Go out for outdoor dining over next three months (July-September)

Average



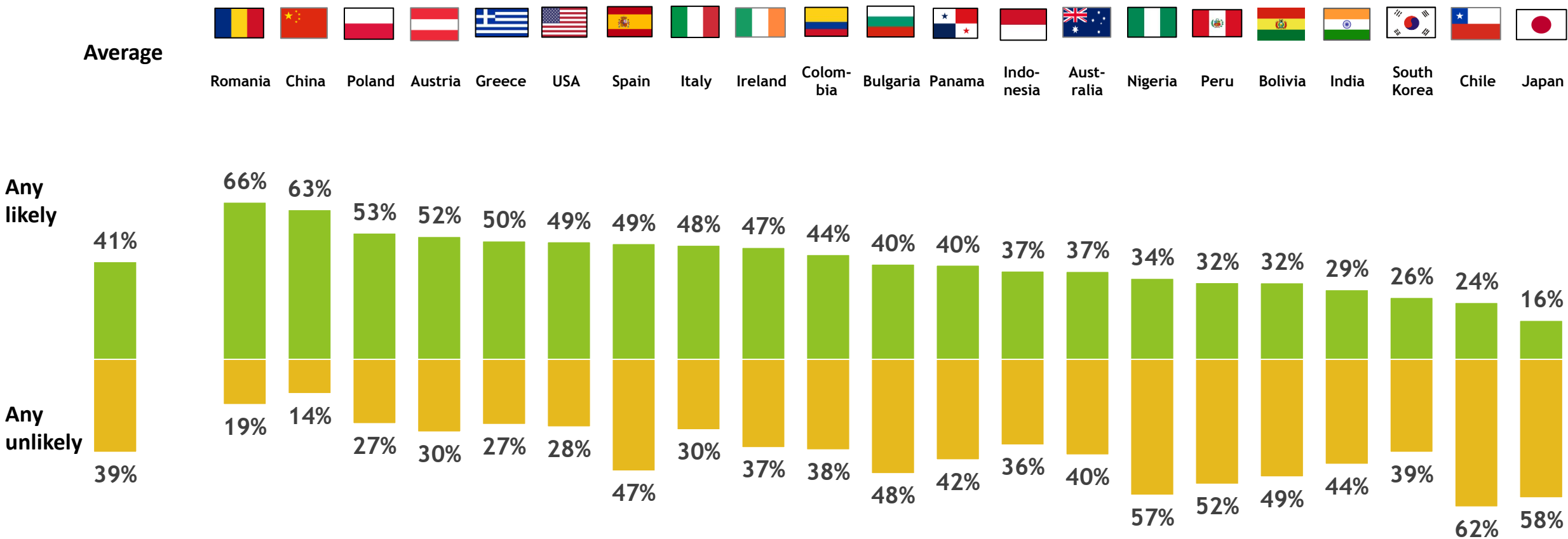
More than three quarters in Romania and in Italy are likely to go to drink outside a bar over the next three months

Drink at a bar outside over next three months (July-September)



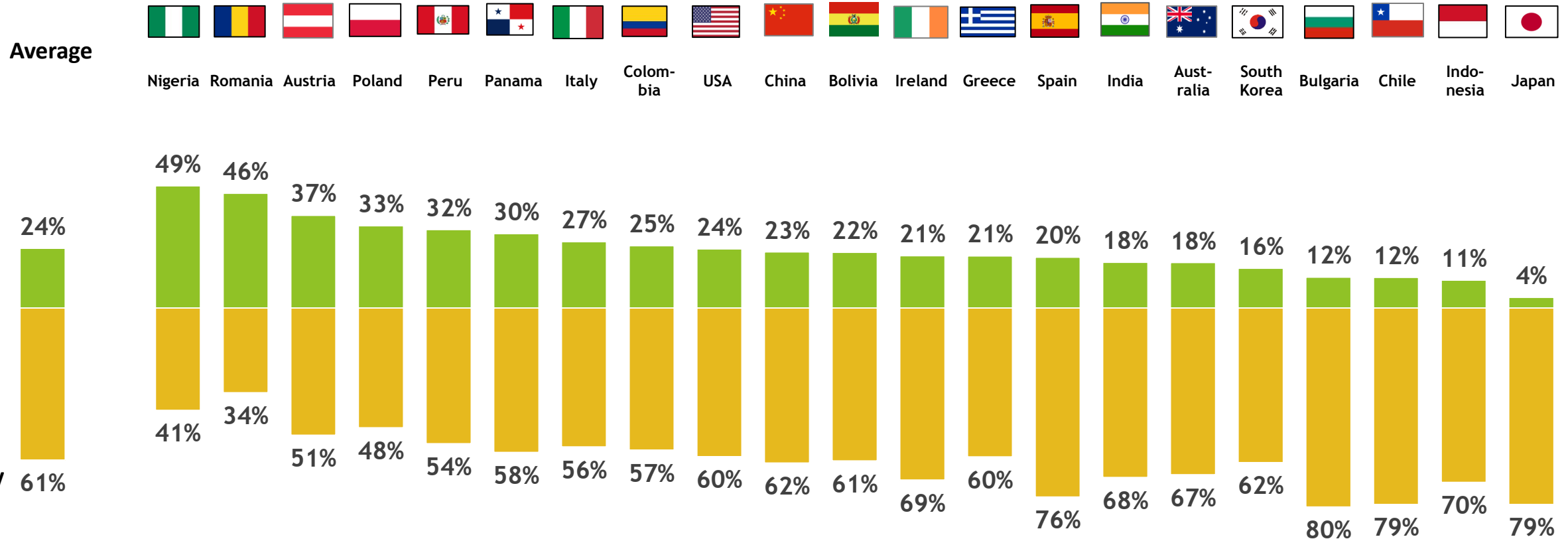
Opinion most divided in Spain, as almost half are likely to stay in a hotel over next three months and almost half are unlikely to

Stay in a hotel over next three months (July-September)



Those in Bulgaria, Chile, Japan and Spain are the most inclined to suggest they are unlikely to go on a foreign holiday in the next three months

Go on a foreign holiday over next three months (July-September)



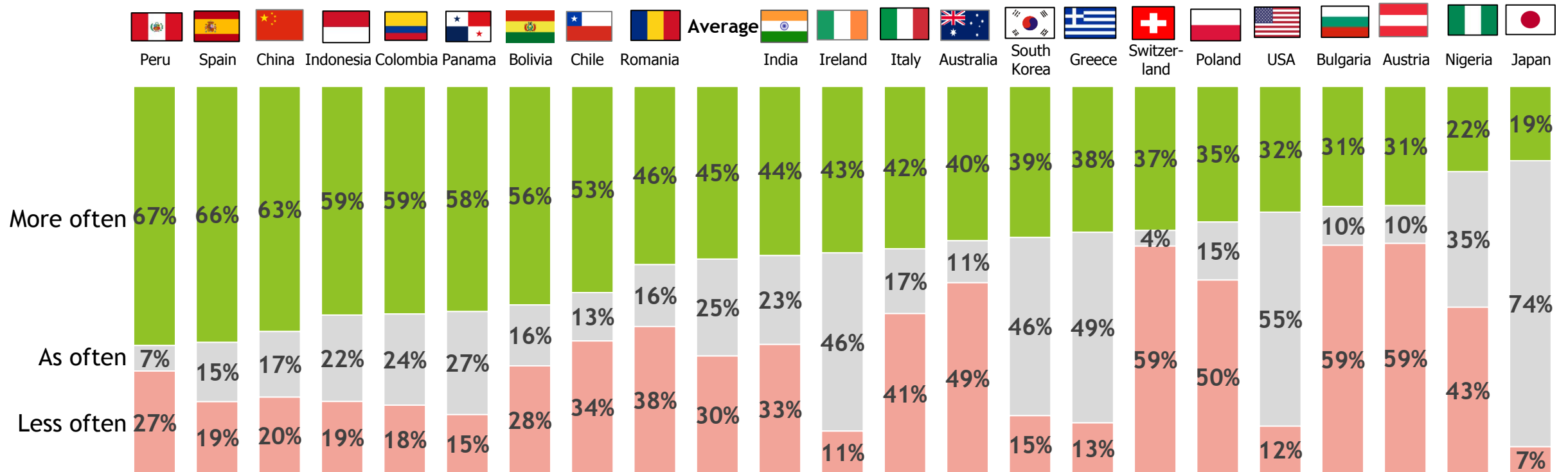


MARKET
RESEARCH
WORLDWIDE

2. Impact of COVID

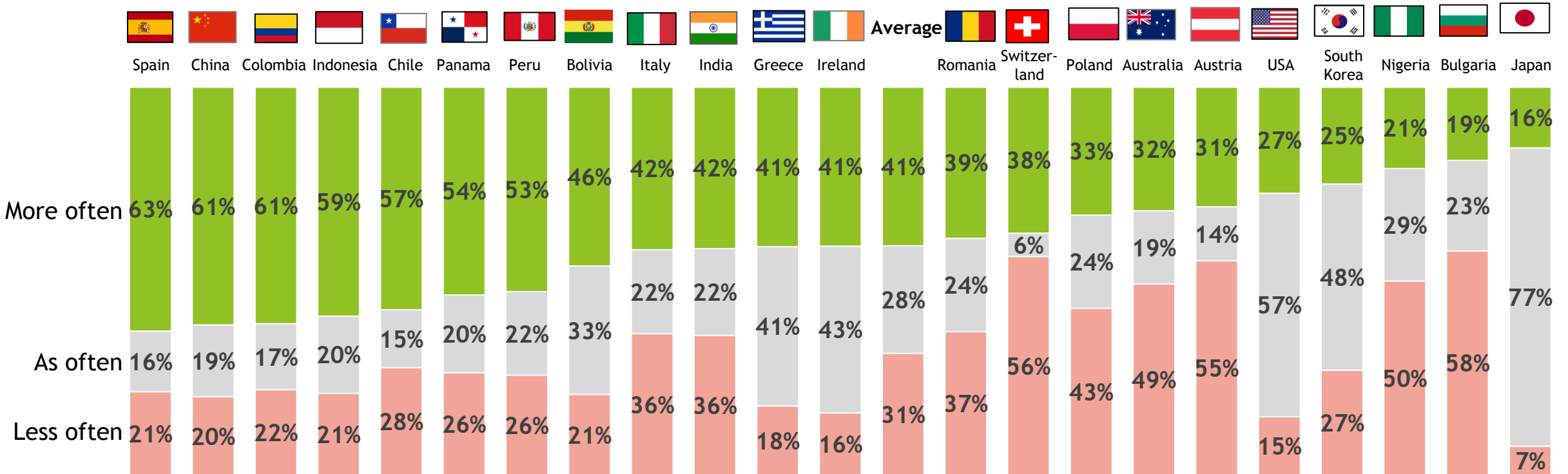
On average, more than 2 in 5 (45%) are cooking meals from scratch more often than they were pre-pandemic, rising to 67% in Peru, 66% in Spain and 63% in China

Cooking meals from scratch



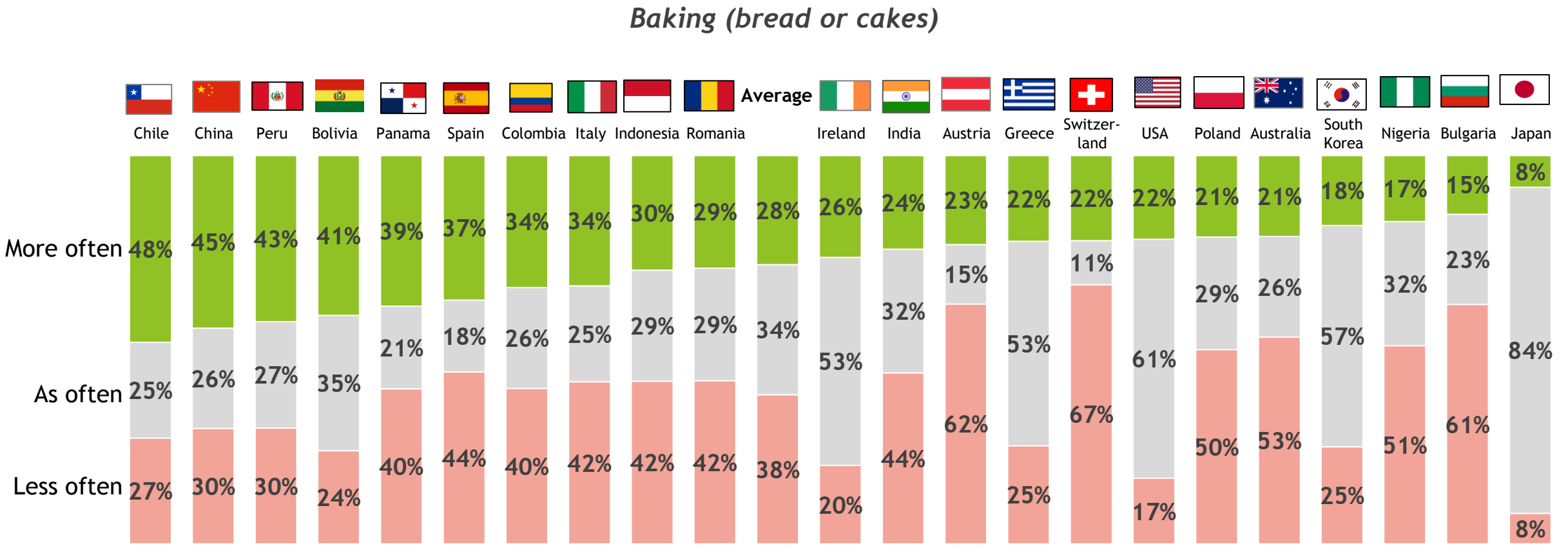
More than 3 in 5 adults in Spain, in China and in Colombia are trying out new meal recipes more often nowadays than they were pre-pandemic

Trying out new meal recipes



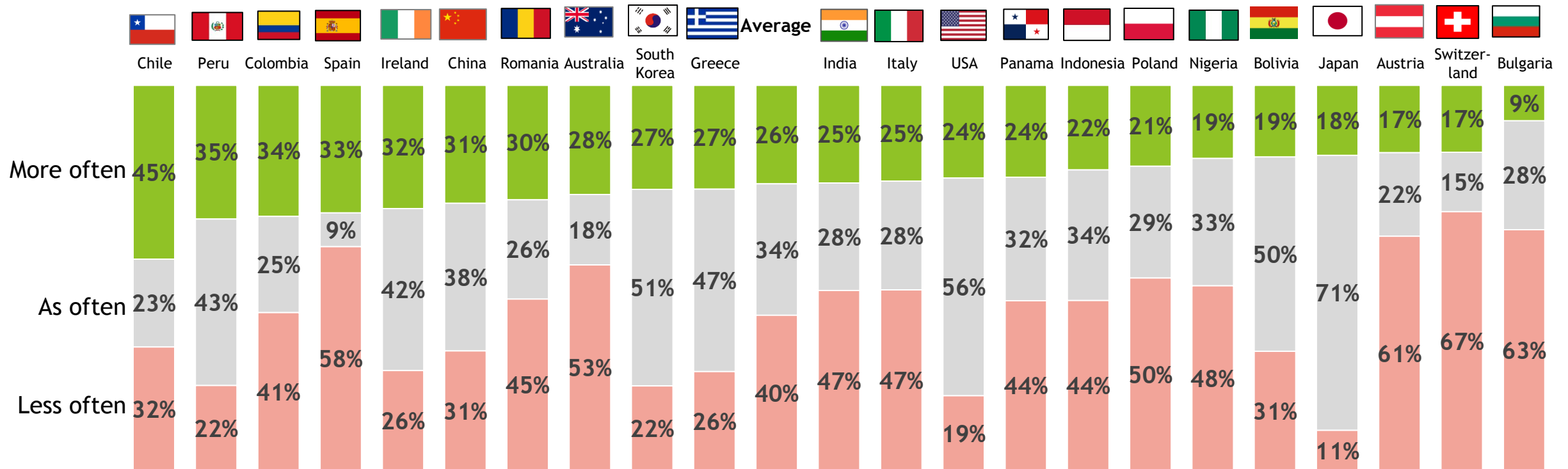
Q.3 For each of the following activities, could you please tell us whether you are doing them more often, less often or the same amount as before the COVID-19 pandemic began? Eating chocolate/sweets/confectionary

More than a quarter are baking more often these days than they were before the pandemic began, while almost 2 in 5 suggest they are doing so less often

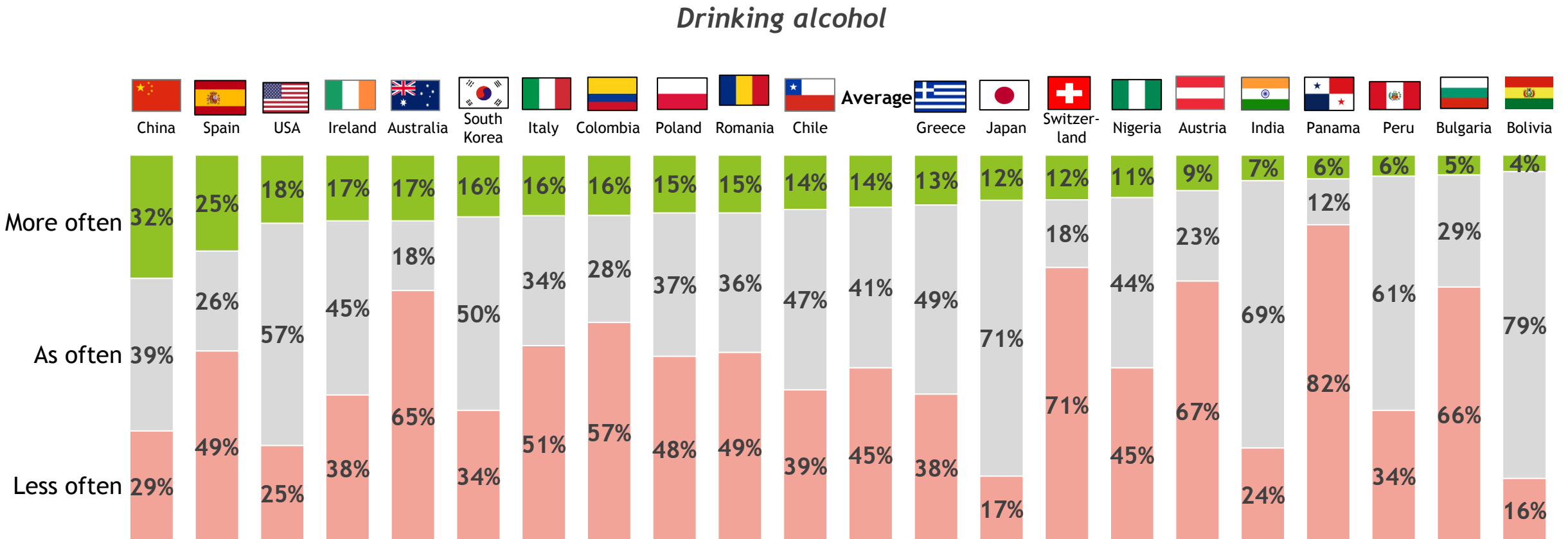


On average, 2 in 5 (40%) are eating chocolate/sweets/confectionary less often nowadays than they were before the pandemic

Eating chocolate/sweets/confectionary

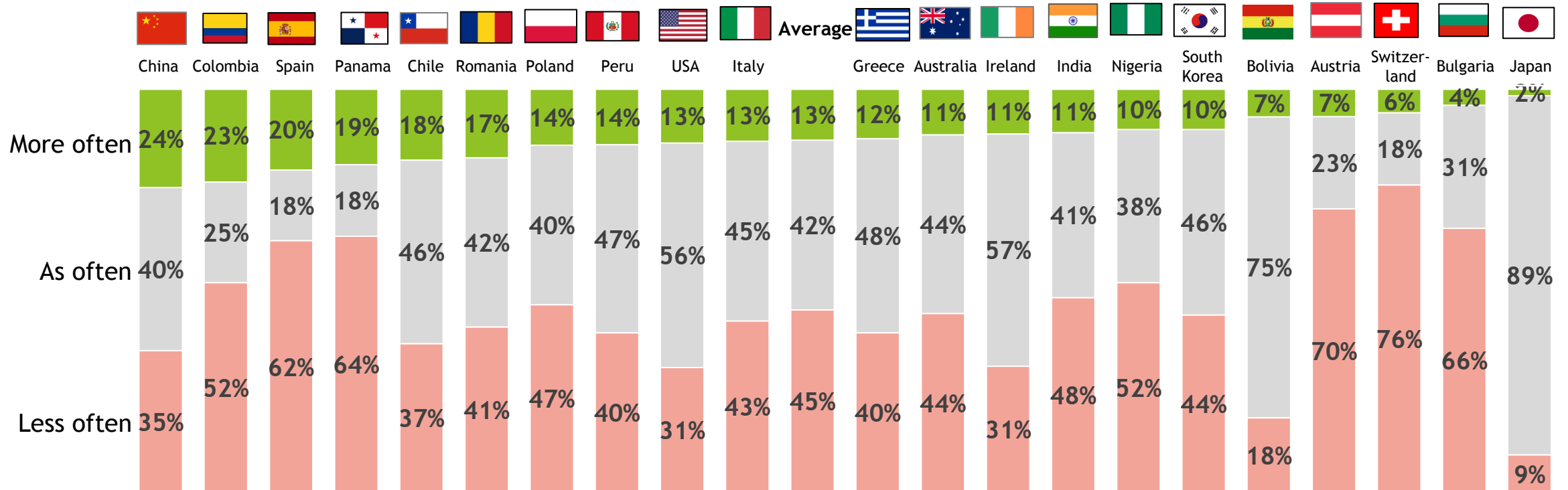


On average, 1 in 7 adults taking part in this survey were drinking alcohol more often than before the pandemic, rising to 1 in 3 in China and 1 in 4 in Spain

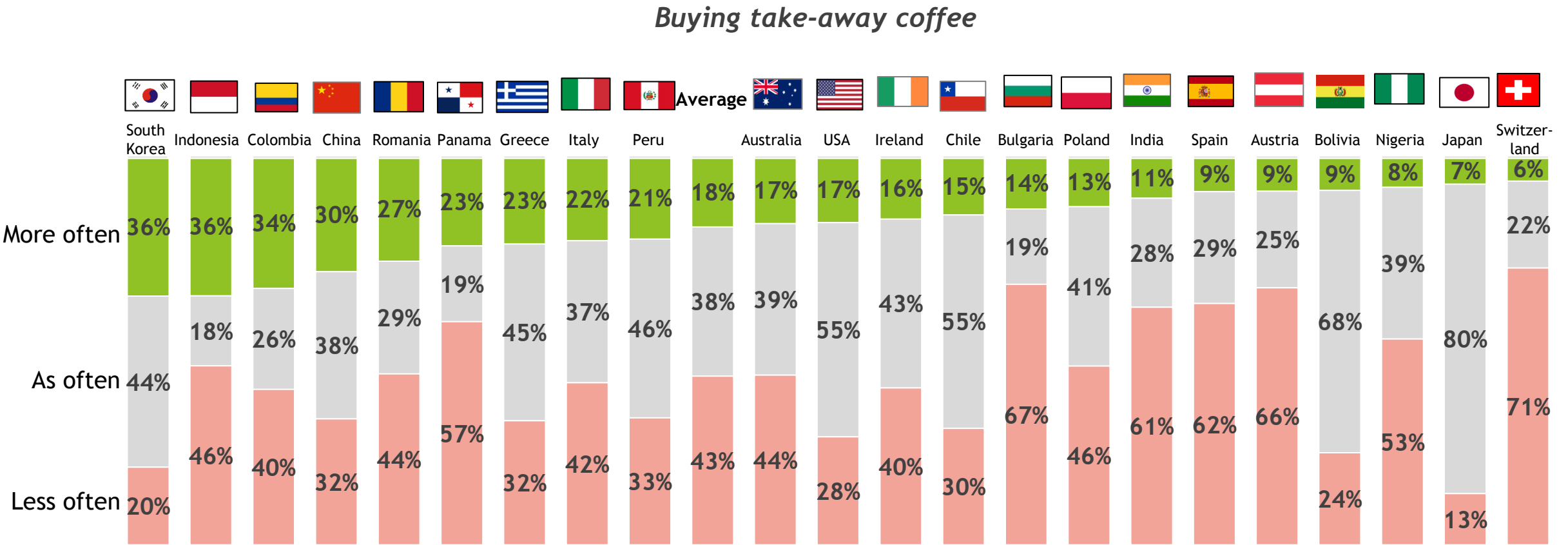


Almost a quarter (24%) in China and (23%) in Colombia are trying out new cocktail recipes more often nowadays than they were pre-pandemic

Trying out new cocktail recipes

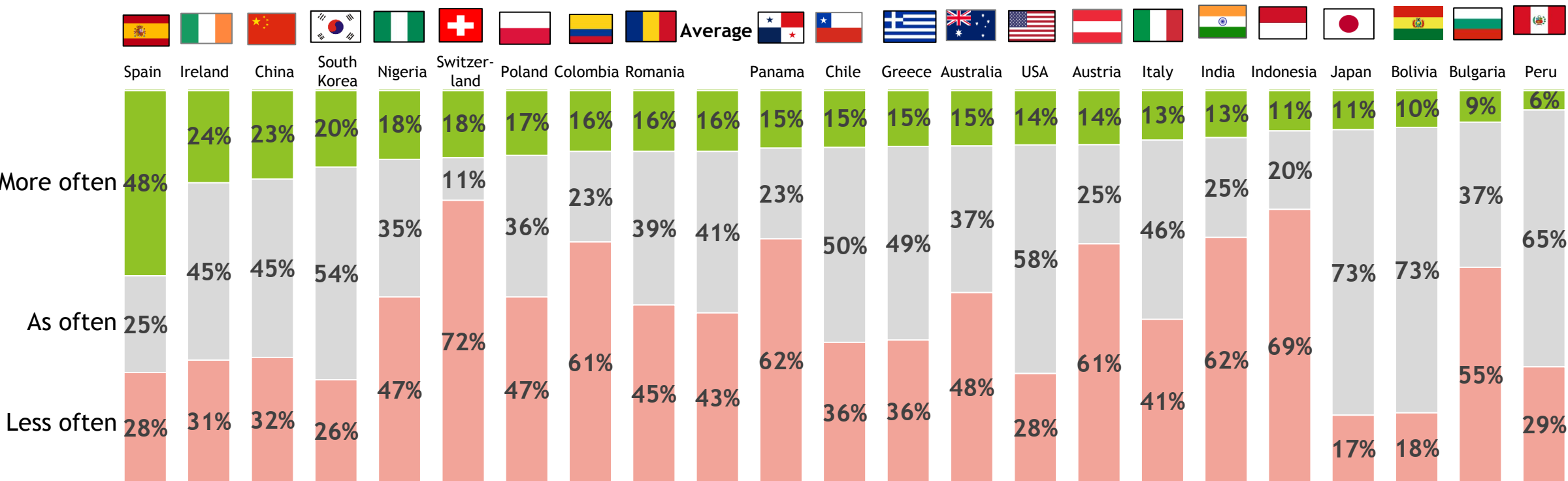


More than a third of adults in South Korea, in Indonesia and in Colombia are buying take-away coffee more often nowadays than they were before the start of COVID-19



Those in Spain are the most likely to indicate they are treating themselves to more luxury/premium foods nowadays than they were before the pandemic, while those in Switzerland and in Indonesia are most inclined to be doing so less often

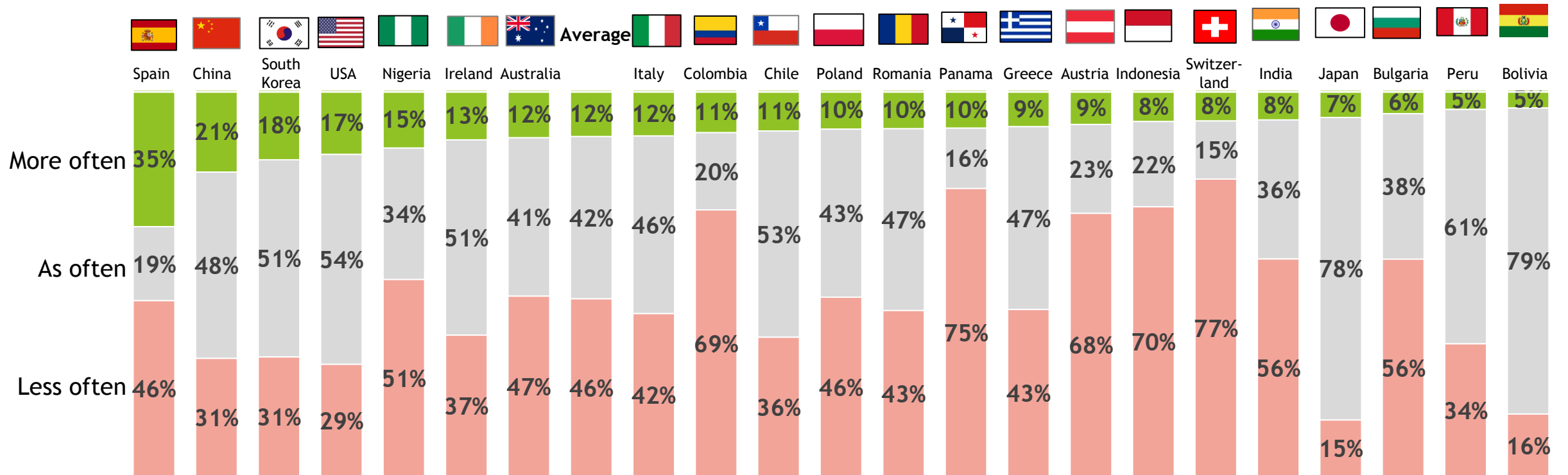
Treating myself to more luxury/premium foods



Q.3 For each of the following activities, could you please tell us whether you are doing them more often, less often or the same amount as before the COVID-19 pandemic began? Treating myself to more luxury/premium foods

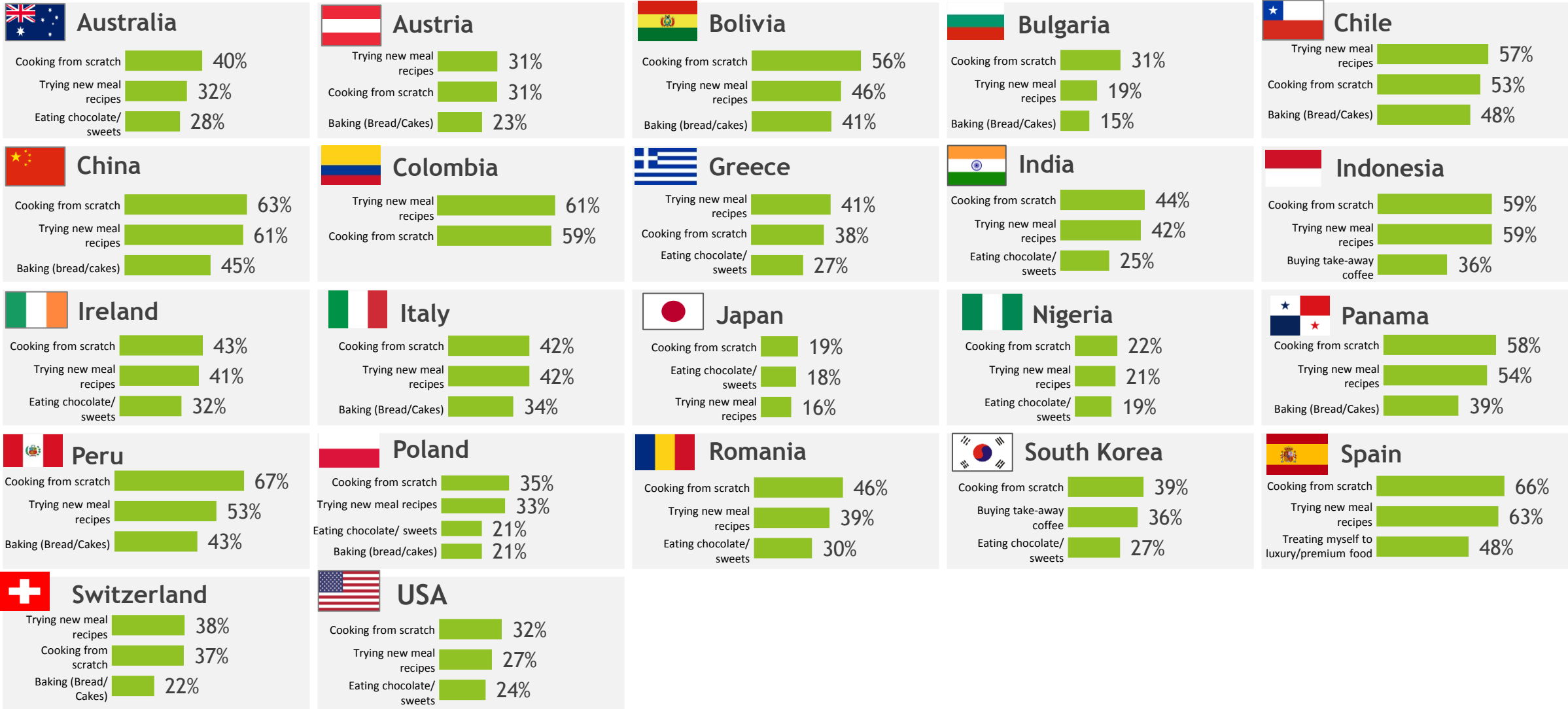
On average, more than 2 in 5 (46%) are treating themselves to more luxury/premium drinks less often than they were before the pandemic.

Treating myself to more luxury/premium drinks



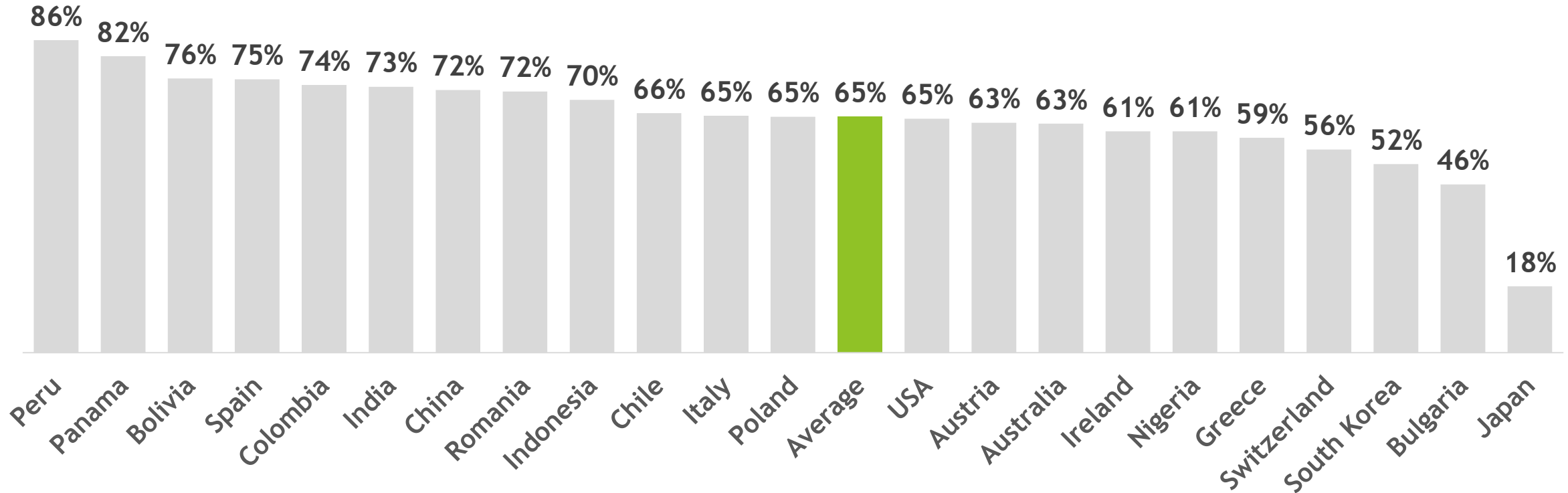
Quite a few around the world have been cooking more from scratch or trying new recipes since the start of the pandemic

% doing more of each activity since COVID



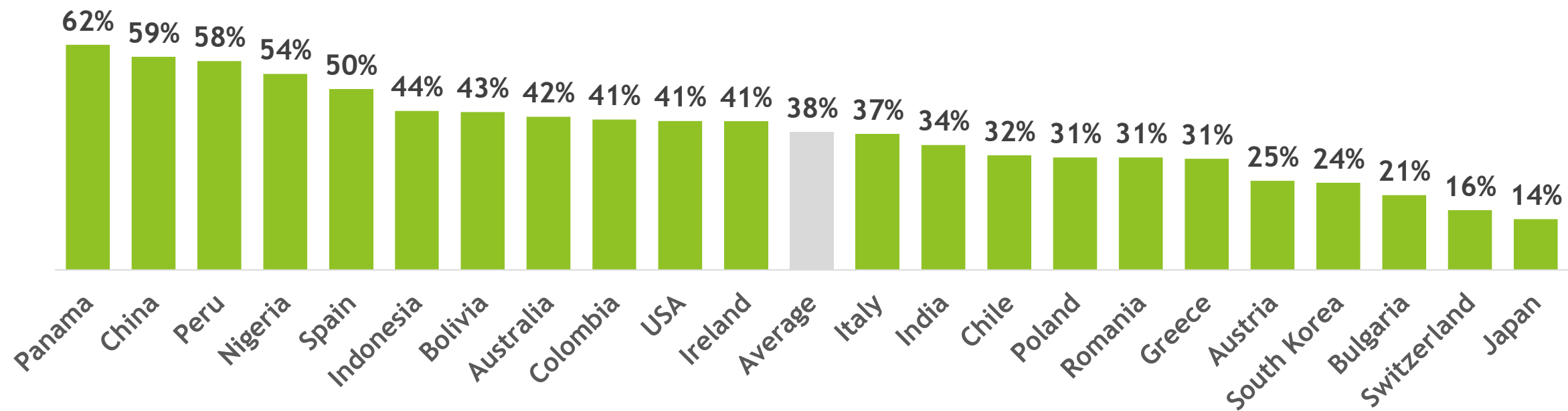
Majority in most countries would agree that they tend to make a grocery list and stick to it, although agreement level drops to just 18% in Japan

% agree that they tend to make a grocery list before I go shopping and stick to it

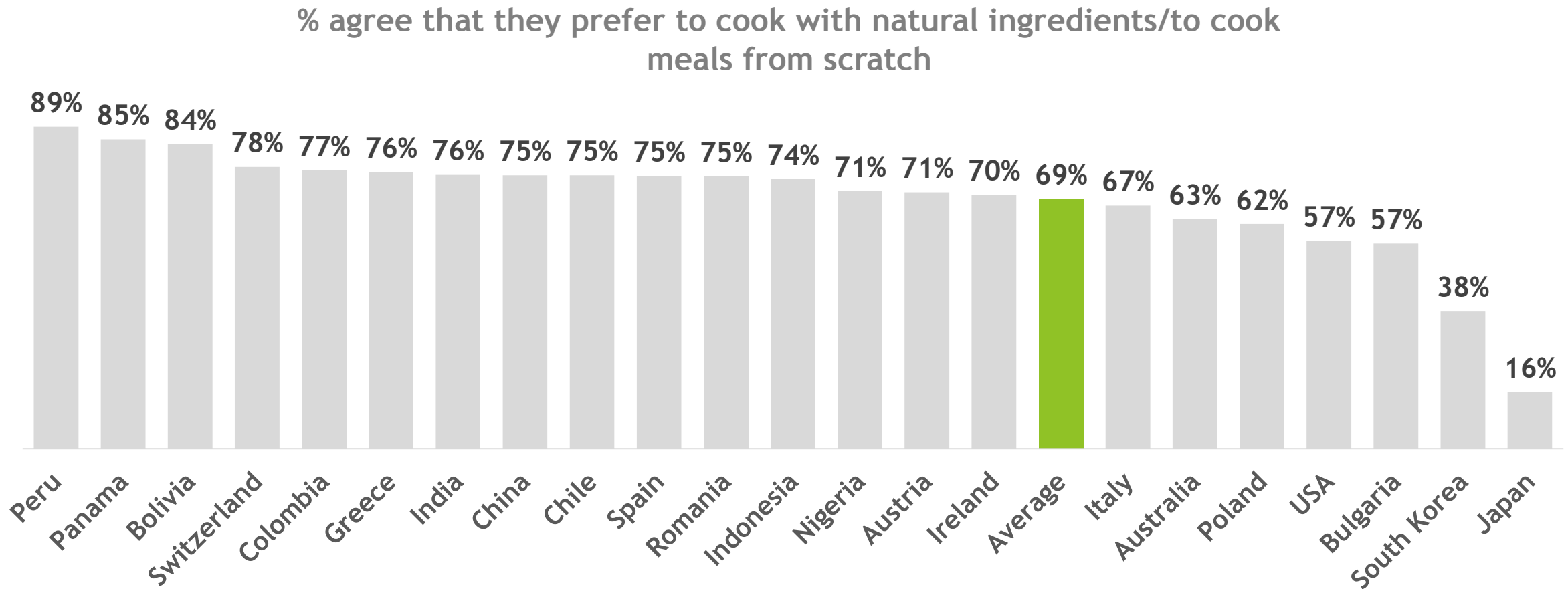


Those in Panama, China and in Peru are the most likely to agree that they plan out meals for each day at the start of the week

% agree that they plan out my meals for each day at the start of the week

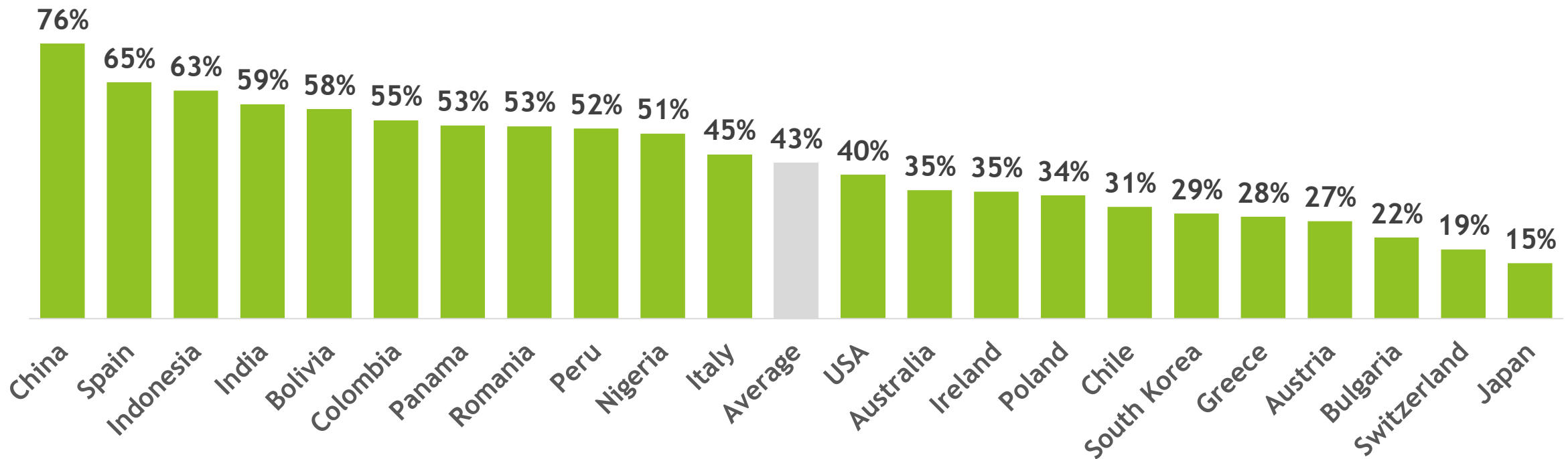


Those in South Korea and in Japan are far less inclined than others to agree that they prefer to cook with natural ingredients or to cook meals from scratch

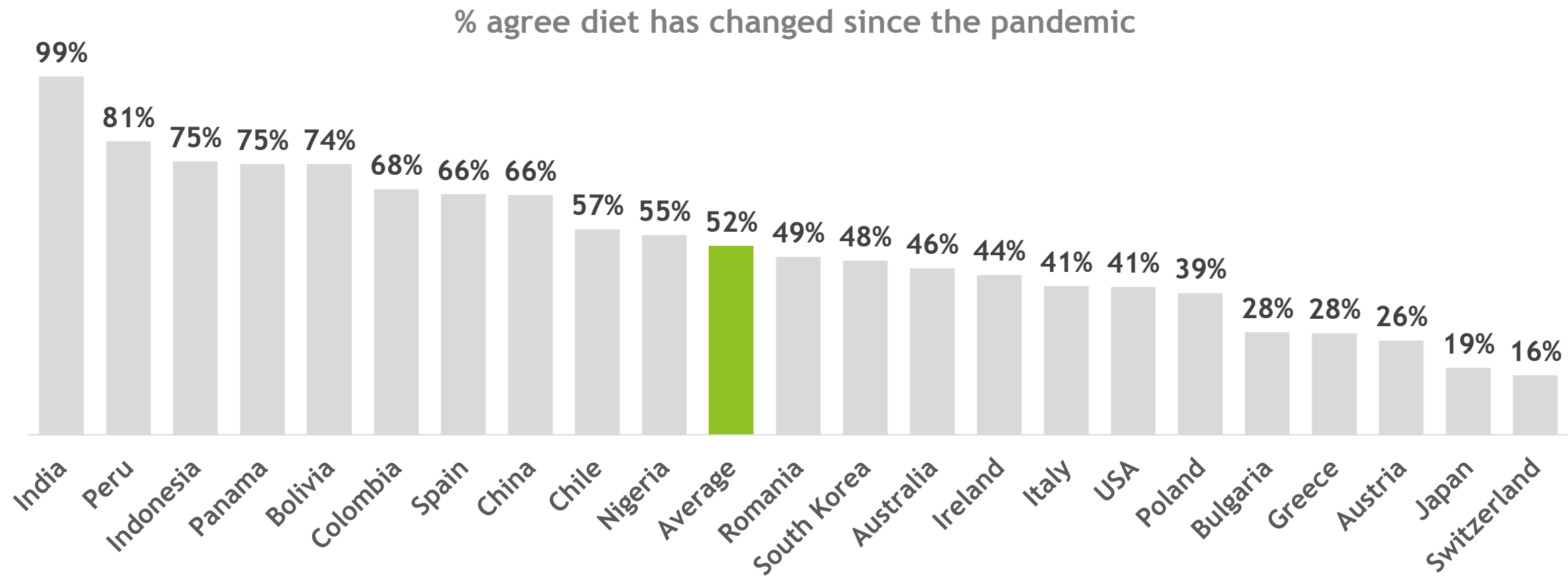


On average, more than 2 in 5 would say that their diet has improved a lot since before the pandemic, rising to 76% in China

% agree that their diet has improved a lot since before the pandemic

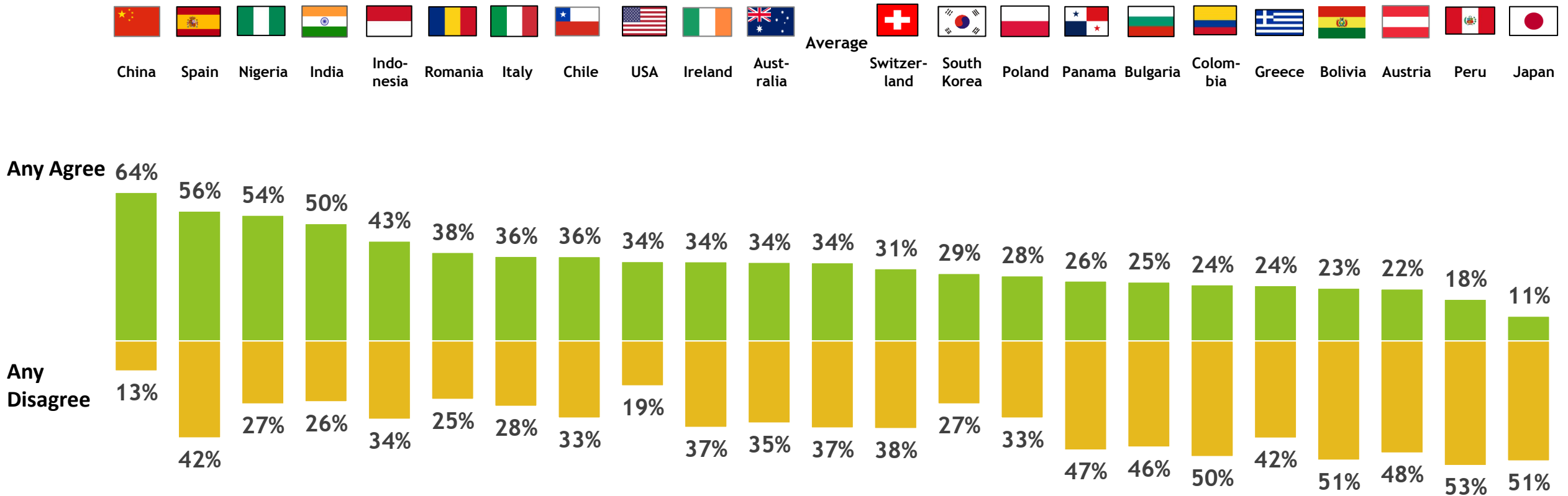


On average, half would agree that their diet has changed since the pandemic, rising to 99% in India



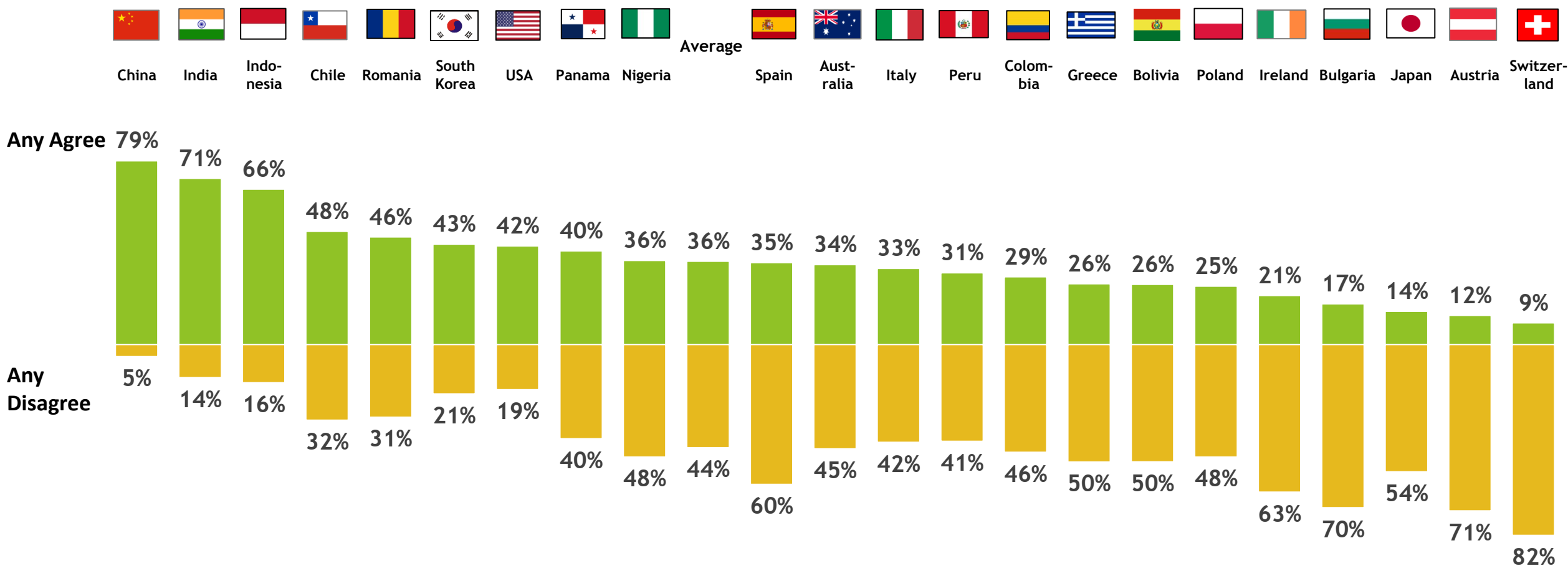
Opinion polarised in most countries in terms of the proportion spending extra money on more expensive groceries nowadays for a treat and those who are not

I find myself spending extra money on more expensive brands or products when grocery shopping nowadays because I feel I deserve it



Those in China, India and Indonesia are the most inclined to indicate that they started doing some grocery shopping online since COVID, whereas those in Bulgaria, Austria and Switzerland are the most likely to disagree with this statement

I have started doing some of my grocery shopping online since the pandemic began



Q.6 We'd now like you to think about reasons for buying. For each of the statements below, please tell us how strongly or otherwise you agree or disagree with each of them. - I have started doing some of my grocery shopping online since the pandemic began

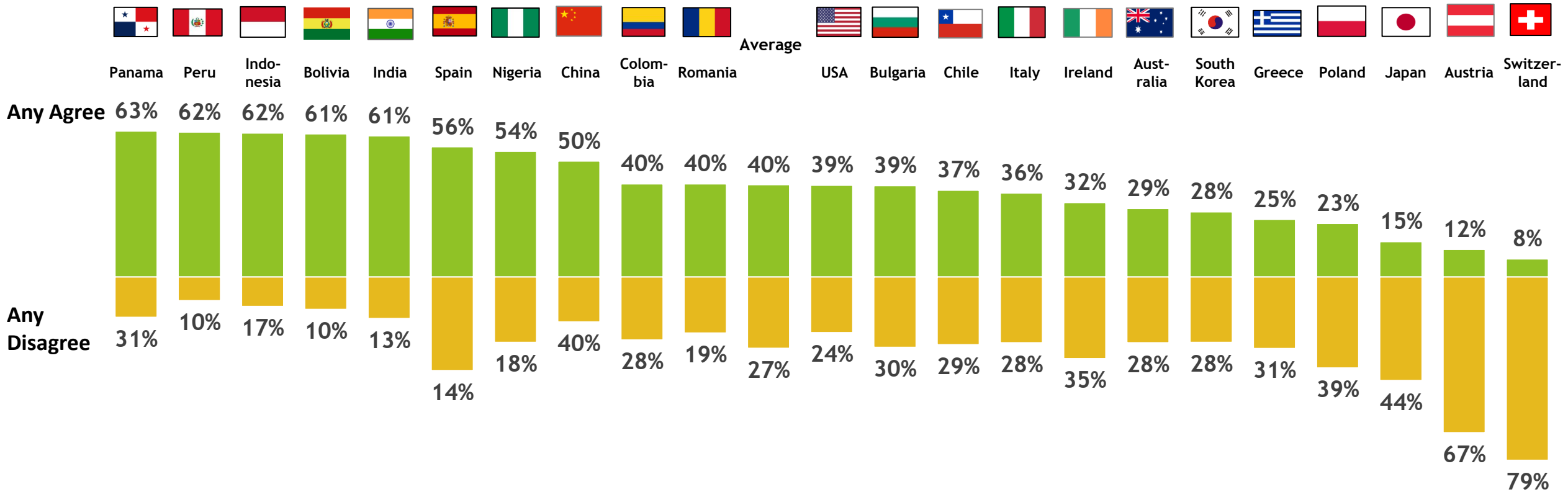


MARKET
RESEARCH
WORLDWIDE

3. Impact of Sustainability

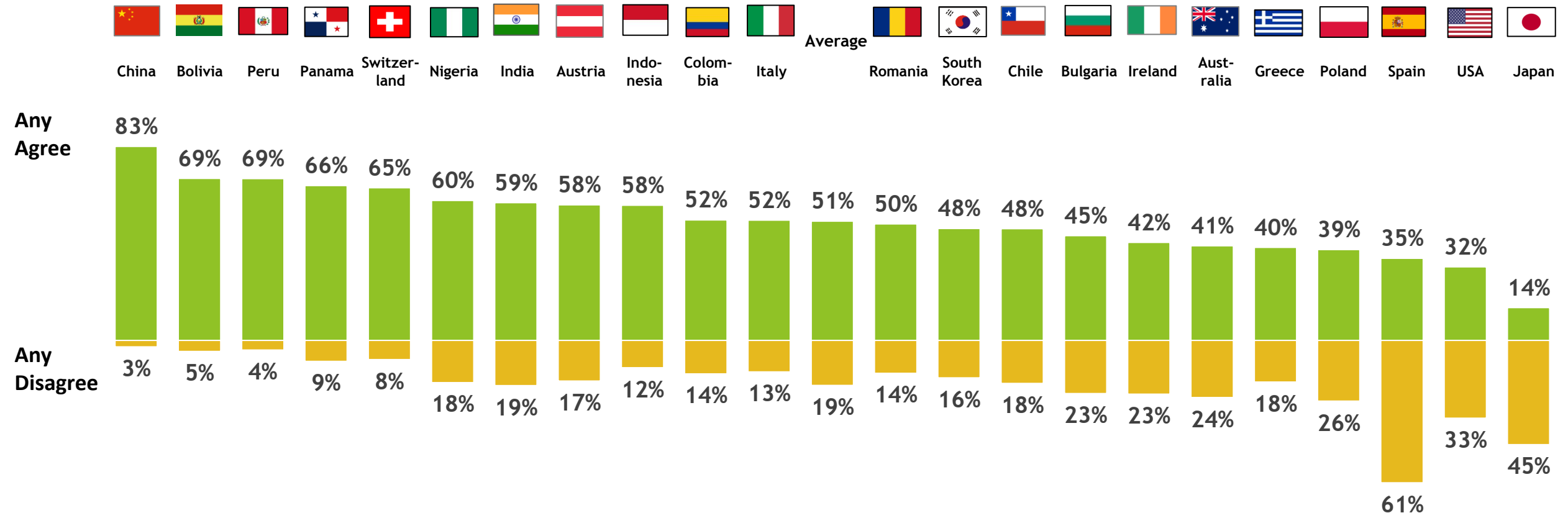
Those in Panama, Peru, Indonesia, Bolivia and India are the most likely to agree that they prefer to buy food that is wrapped in plastic due to the risk of COVID-19, while those in Austria and Switzerland are the most inclined to disagree with this

I prefer to buy food that is wrapped in plastic nowadays because of the risk of COVID-19



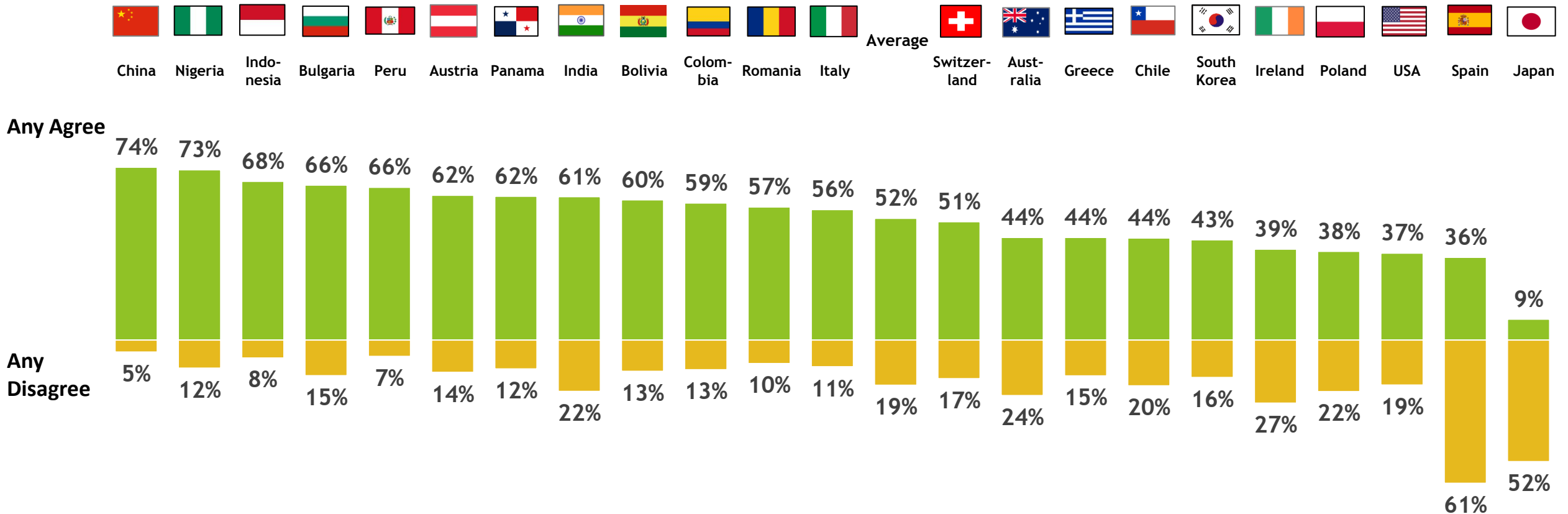
Those in China are the most inclined to agree that they often choose products based on whether they are sustainable/environmentally friendly or not, whereas those in Spain and Japan are the most inclined to disagree. Opinion most divided in the US.

I often choose products based on whether they are sustainable/ environmentally friendly or not



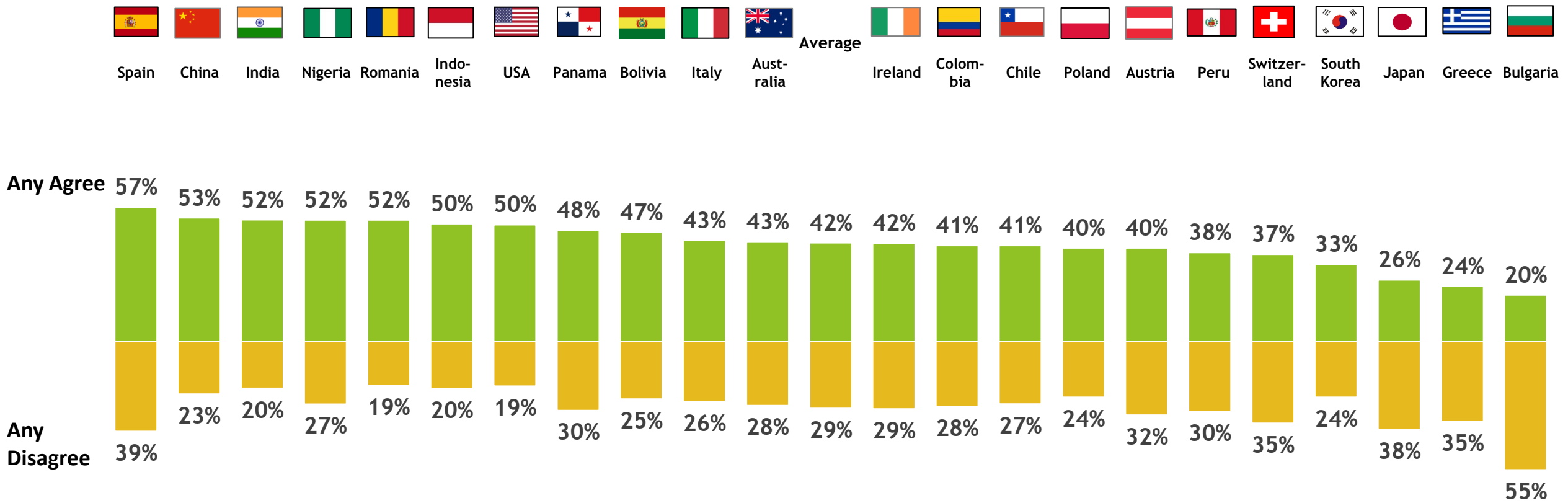
While the majority in many countries would agree that they give a lot of consideration to sustainability with grocery shopping, those in Spain and Japan are the most inclined to disagree

I give a lot of consideration to sustainability when shopping for groceries



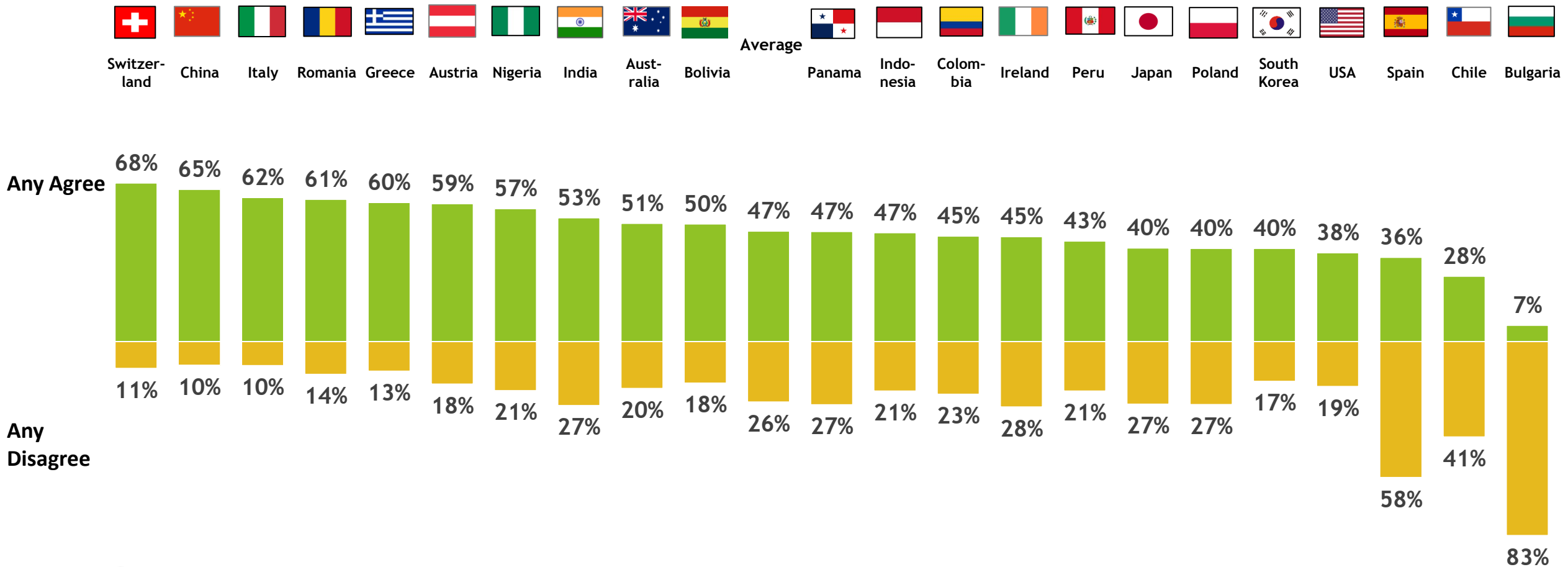
Almost 3 in 5 (57%) in Spain would agree that they tend not to check whether packaging is recyclable or not before buying a product, while 55% in Bulgaria would disagree

I tend not to check whether a product's packaging is recyclable or not before buying when doing my grocery shopping



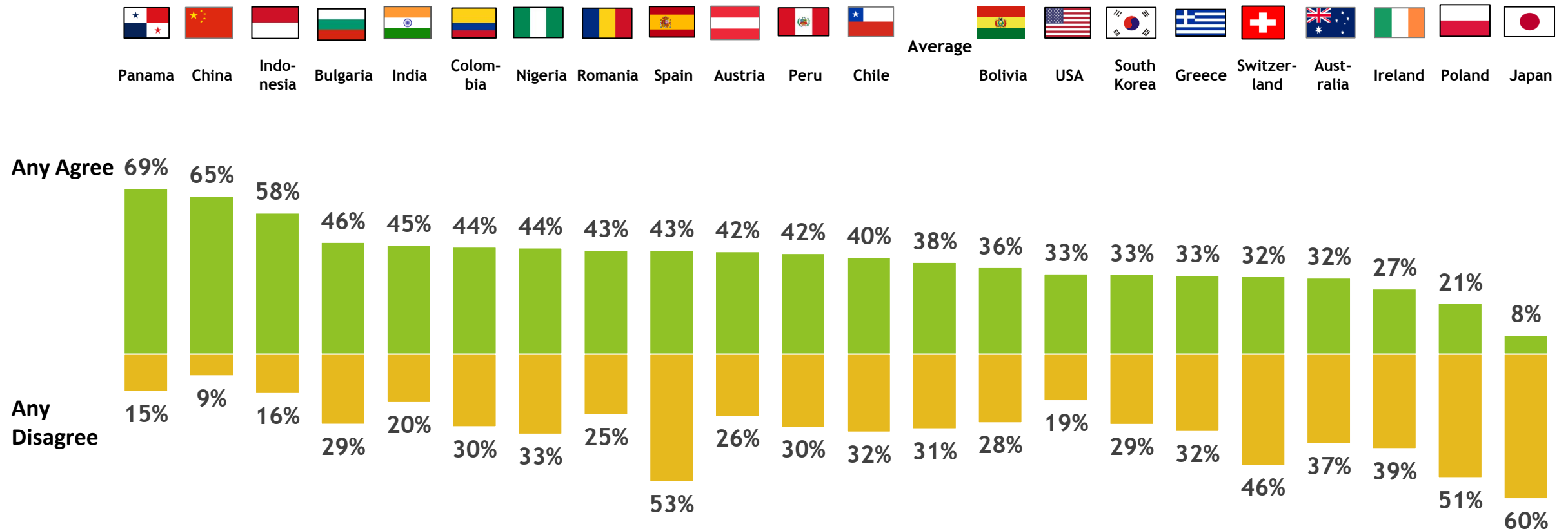
More than two thirds in Switzerland and 3 in 5 in China, Italy, Romania and Greece agree that they make sure to check whether a product has been made in their country before buying when grocery shopping. Those in Spain and Bulgaria are the least concerned about this

I make sure to check whether or not a product has been manufactured in this country before buying when doing my grocery shopping



While those in Panama, China and Indonesia are the most inclined to agree that they always use a “keep cup”, those in Ireland, Poland and Japan are the least inclined to do so. Opinion most polarised in Spain

I always use a “keep cup” when getting coffee rather than use a take-away cup with a plastic lid





MARKET
RESEARCH
WORLDWIDE

4. Key Themes

- ▶ **More of a focus on food than alcohol during the pandemic it would seem:**
 - On average, spending more on ordering food for home delivery than on alcohol for the home
 - Far more would suggest they are cooking from scratch or trying new meal recipes more often nowadays than they were before the pandemic, than would indicate they are drinking alcohol more often.
 - More use of snack foods and breakfast items (including coffee) as many stay at home.
 - Some cut out alcohol more (possibly due to pandemic restrictions).

- ▶ **Seems to be more of a preference for celebrating/spending quality time with family at home nowadays:**
 - On average, more would rather cook a special meal at home than go to a restaurant to celebrate something special.
 - Higher proportion (62% on average) would prefer to celebrate a birthday at home than would go to a restaurant or bar to do so (38%).
 - 55%, on average, would prefer to have a meal at home to spend quality time with family in comparison with 45% indicating they would prefer to go on a day trip together.

- ▶ **More confidence in outdoor than indoor dining nowadays:**
 - On average, 57% confident in the safety of outdoor dining in comparison with 46% confident in safety of indoor dining.
 - That said, confidence in either option is much lower in Poland, Japan and Bolivia.

- ▶ **COVID-19 concerns potentially interfering with concerns relating to environment/sustainability for some:**
 - On average, 51% agree that they often choose products based on whether they are sustainable or not.
 - However, 40% agree, on average, that they prefer to buy food that is wrapped in plastic nowadays due to the risk of COVID-19.



MARKET
RESEARCH
WORLDWIDE

Global Eating, Drinking & Sustainability Survey

IRIS Multi-Country Study

September 2021