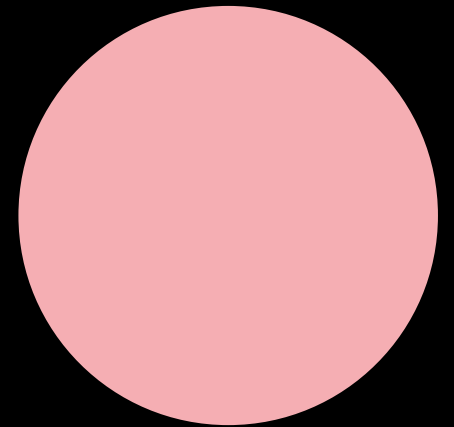

WWF Eat4Change survey International research Consumers report

April 2021



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Contents:

Background and objectives	3
Methodology	4
Executive summaries:	
European results	5
Main findings: results by country:	
Environmental and ethical concerns around food	12
Impact of food production and consumption	15
Knowledge, confidence and concern	24
Barriers preventing sustainable food choices	27
Sustainability, governance and behavioural change	30
Appendix:	
Country summaries	35

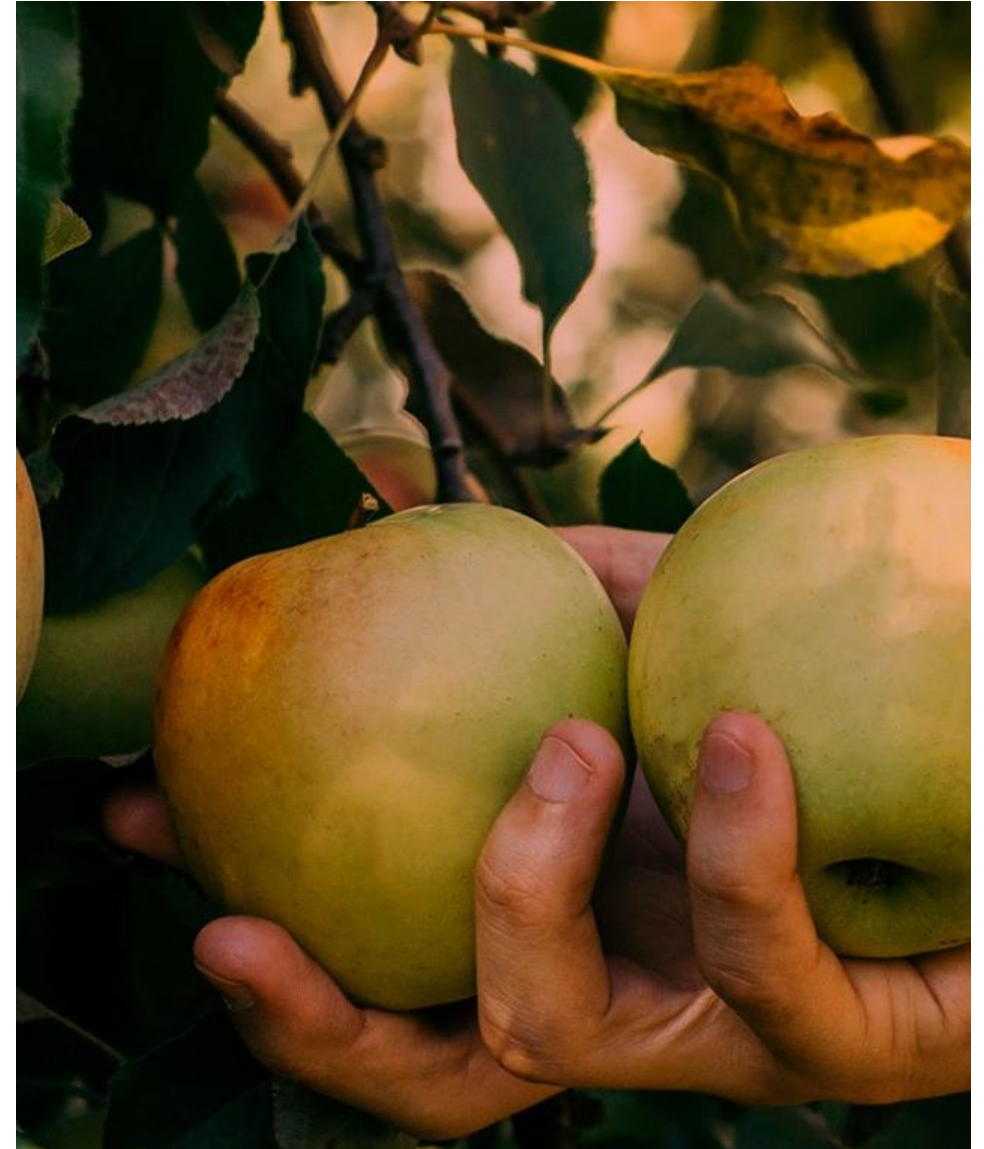
Background and objectives

WWF commissioned a survey of adults in nine European countries (Austria, Belgium, Sweden, France, Greece, Finland, Portugal, Estonia and the UK) to support its Eat4Change project due to launch in Autumn 2021 and funded by the EU Commission in partnership with other key organisations.

Eat4Change aims to engage citizens on the topic of sustainable food, highlighting global interconnections and dependencies and demonstrating how individual diets can impact on the wellbeing of people and the planet.

This report presents the topline findings from the research across countries drawing out the key points and story lines at a European level in the executive summaries at the front.

Please note that you can find the country findings summarised in more detail in the Appendix.



Methodology



Sample

Total sample: Europe: 11,439

Austria (1,032)
Belgium (1,028)
Estonia (1,044)
Finland (1,031)
France (2,098)
Greece (1,017)
Portugal (1,052)
Sweden (1,074)
UK (2,063)

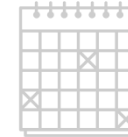


Method

An online panel

Data were weighted by country by age, gender, region and social grade to be nationally representative.

All countries were weighted to be equally represented in the combined European total

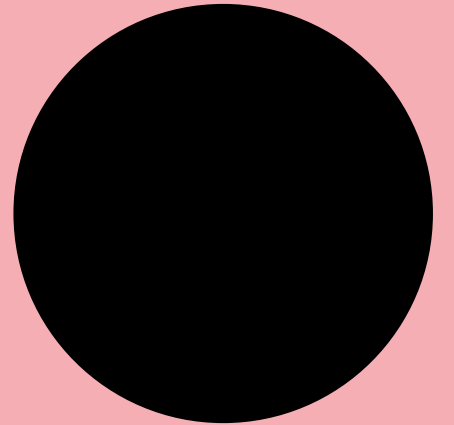
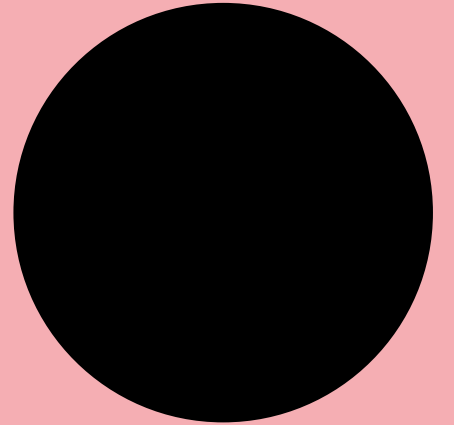


Fieldwork dates

24th February to
22nd March
2021

Executive Summary

Key findings overall:
European level



Executive Summary 1: current attitudes to choosing sustainable food

People's top environmental considerations are focused on food that is not wasteful, that is locally grown and seasonal:

- buying the right amount of food and paying attention to expiry dates (54%);
- buying locally grown food (51%);
- buying food that is in season (48%).

These are rated higher in importance than wider sustainable considerations of animal welfare standards (34%), minimal packaging (32%), unprocessed food (32%), absence of palm oil (23%), companies' fair treatment of workers (25%), their values (22%) and the environmental accreditation of their foods (22%).

Of lesser importance are environmental and ethical considerations for:

- buying food that does not use a lot of natural resources (17%);
- buying less or no meat, fish or dairy food (16%) – even though production is judged to have a negative impact on the environment (*see Summary 2*).

Executive Summary 2: negative impact of food production and consumption

One in two European adults think that the food we produce and consume has a negative impact on the environment (52%):

- This is more keenly felt amongst fish eaters (61%) and vegetarians/vegans (66%).

Conversely, people are far less critical of themselves – regarding the food that they eat as less negatively impactful (33%):

- Vegetarians/vegans are the lowest in this respect (26%).

At country level, food production tends to be viewed as having a negative rather than positive impact:

- Only 4 in 10 think the food that their own country produces has a positive effect on the environment (42% positive);
- Over 1 in 2 think food produced outside of one's own country has a negative effect on the environment (54% negative).

Regardless of country of production:

- Beef (64%), pork (63%) and poultry (58%) are seen to have the most negative impact on the environment – more so than dairy (46%), lamb (46%) and seafood (45%);
- In comparison fruit and vegetables (27%) are low impact foods, as are eggs (23%);
- Interestingly there is a clear disconnect between high impact 'poultry' and low impact 'eggs'. This is also evident between high impact beef, but lower impact dairy foods.

Executive Summary 3: knowledge, concern, confidence and interest

Knowledge and concern about the environmental impact caused by large scale food production and consumption is reasonably well established:

- Most commonly, 2 in 3 are knowledgeable about: global warming and climate change (67%), pollution of water, air and soil (65%), and the destruction of land for agriculture (64%);
- Knowledge levels are a little lower regarding: loss of biodiversity and extinction of species (59%), changes to the composition of lakes, rivers, and oceans (53%), decline in soil quality (52%).

And where people are aware of these environmental impacts, levels of concern are high:

- 8 in 10 are concerned regarding the environmental impacts of: pollution (80%), biodiversity (79%), land destruction (78%), global warming (77%), changes to the composition of lakes, rivers, and oceans (77%);
- concern for decline in soil quality is a little lower (72%).

Interest in sustainable food is at an encouraging level, but is constrained by lack of confidence in how to buy and eat environmentally friendly food:

- 6 in 10 say they are likely to buy and eat food that is less damaging to the environment (61%);
- only 1 in 2 are confident in their knowledge of how to buy and eat sustainable food (46% confident);
- and levels of confidence decrease with age (18-24 yrs: 52% confident; >55 yrs: 42% confident).

People need more knowledge and signposts to raise their confidence in making sustainable food choices.

Executive Summary 4: barriers preventing sustainable food choices

There are a number of key barriers that prevent people from choosing foods that are better for the environment and more sustainable.

The main barrier preventing or stopping people, is perceived expense – sustainable food is regarded as being more expensive (47%).

Another major barrier is a knowledge gap – whether due to: unclear food labelling (32%), lack of information on the environmental and social impacts of food products (31%), concerns about nutritional value and impact on health (18%), or just a general lack of awareness of how to eat more sustainably (17%).

Availability is an issue for some – with unavailability at supermarkets and markets (19%) or at eateries such as restaurants and canteens (15%).

Some need to be convinced that sustainable food is appealing:

- It is easier and more tempting to buy less sustainable food (18%);
- It is not appealing in terms of appearance and flavour (10%).

Only a small cohort cite inconvenience:

- not having the time to prepare sustainable food, or that preparation takes too long (13%).

Executive Summary 5: changing behaviours

The majority are of a positive mindset in support of food choices that support environmental and ethical outcomes:

- We should all eat food that is better for the environment (74%);
- Eating food that is sustainable is key to tackling climate change (65%);
- Eating sustainable food is key to achieving the commitment made by the EU/UK to stop climate change and biodiversity loss (EU 66%; UK 65%).

However, barriers to changing behaviours are, as already highlighted – remaining focused on expense, identification and availability:

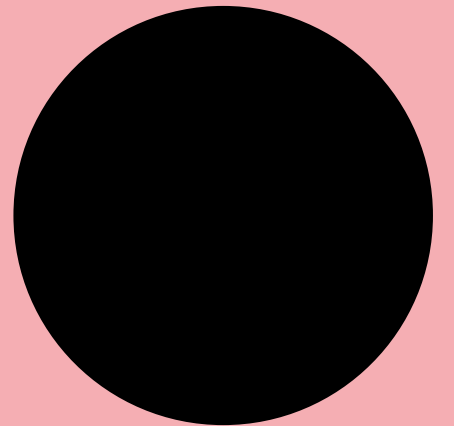
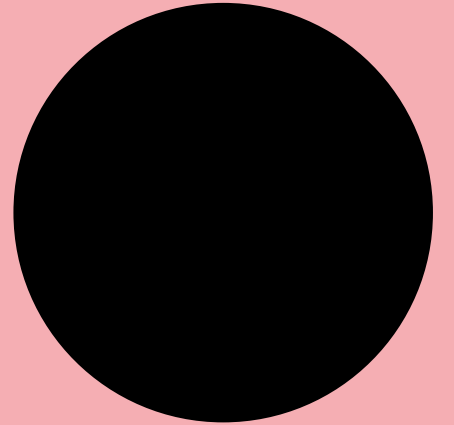
- Sustainable food options are too expensive (67%);
- Sustainable food options are not easy to identify and find in shops (66%).

Furthermore, there is a key issue of trust that needs to be addressed:

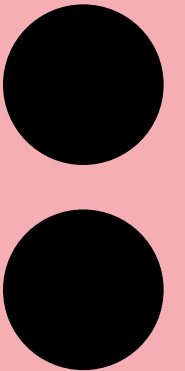
- Trust is low, that other countries outside of the EU/UK enforce strict enough legislation on the environmental standards of the food they produce (EU 36%; UK 40%);
- Trust is particularly low amongst vegetarians/vegans (EU 28%; UK 34%).

Main findings

Results by country



Environmental and ethical concerns around food

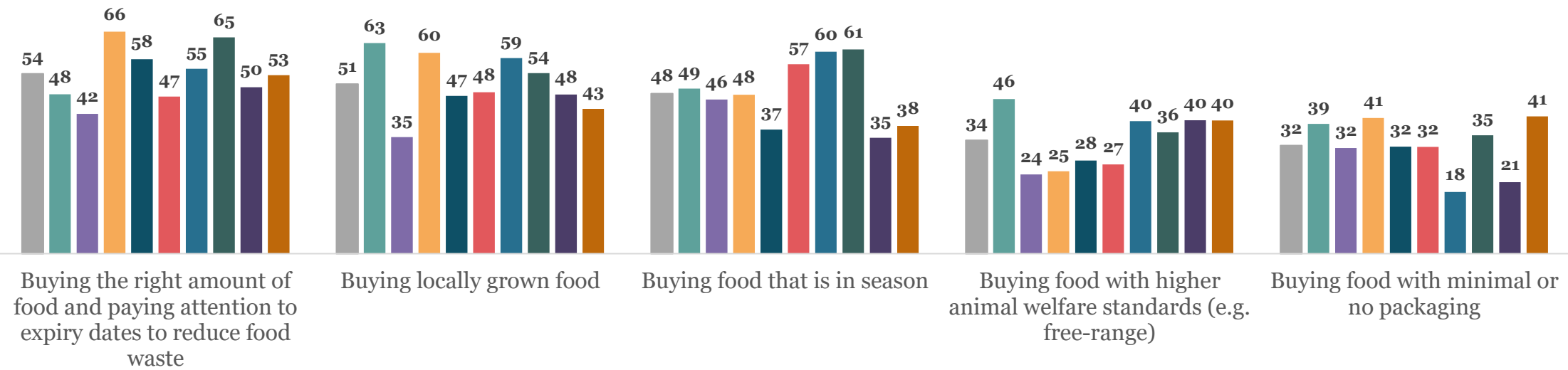


European adults consider reducing waste of most importance, so respondents are most likely to give consideration to volume purchased and expiry dates. Buying locally and also in season is also considered important

- Waste reduction is of particular importance for those in Estonia and Portugal
- Austrian respondents place a greater importance on buying locally

% chosen as 5 most important factors

■ Europe ■ Austria ■ Belgium ■ Estonia ■ Finland ■ France ■ Greece ■ Portugal ■ Sweden ■ United Kingdom



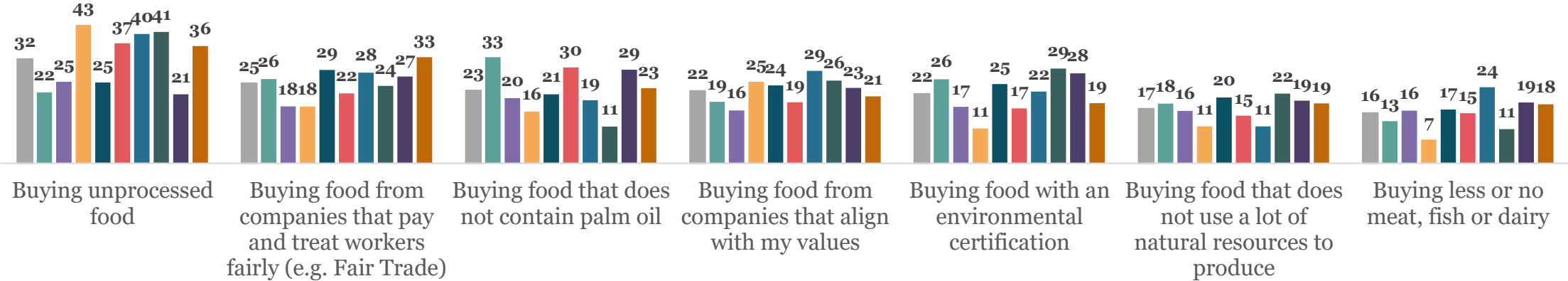
Q2: When choosing the food you buy, which of the following environmental and ethical considerations are most important to you, if any?
Please select up to FIVE and rank them in order of most importance

Overall, adults are less concerned about buying food that does not use a lot of natural resources in production or reducing the amount of animal based products they purchase

- Buying unprocessed food is more appealing to Estonians, Portuguese and Greek adults

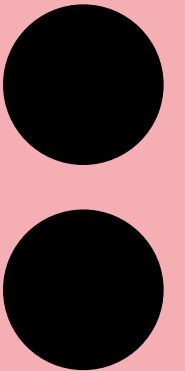
% chosen as 5 most important factors

■ Europe ■ Austria ■ Belgium ■ Estonia ■ Finland ■ France ■ Greece ■ Portugal ■ Sweden ■ United Kingdom



Q2: When choosing the food you buy, which of the following environmental and ethical considerations are most important to you, if any?
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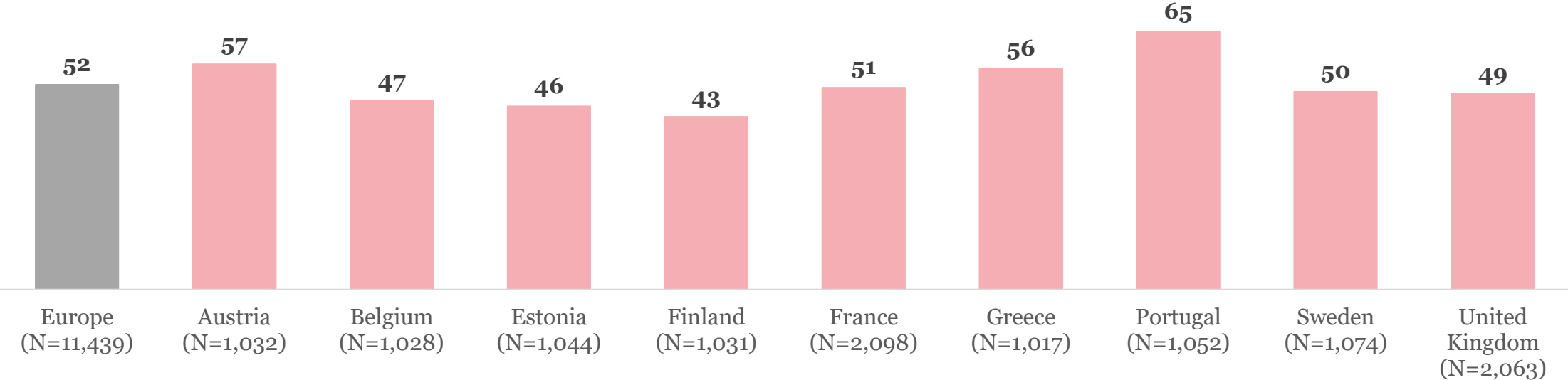
Impact of food production and consumption



Half of European adults do feel that our food production and consumption has a negative impact on the environment

- This is felt most strongly amongst those living in Portugal, as well as Austria and Greece

Impact of food production on environment - % Negative

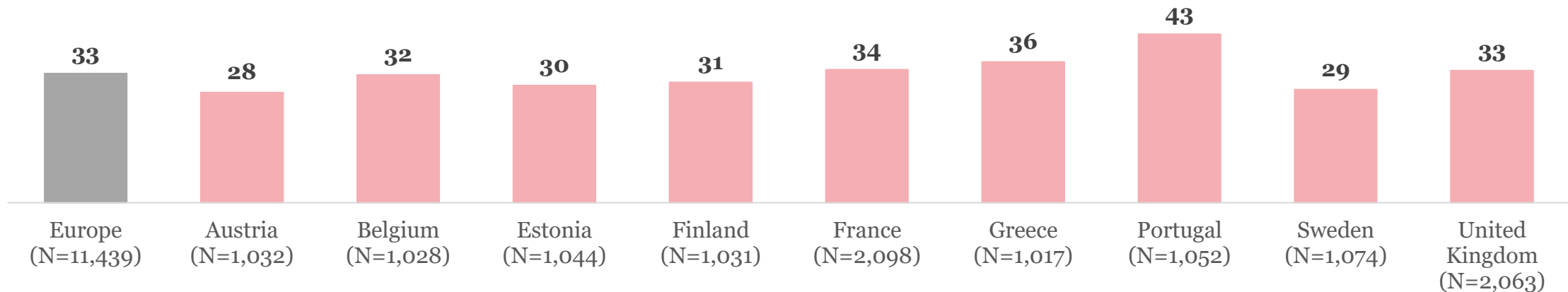


Q3: To what extent, if at all, do you think that the food we produce and consume has a positive or negative impact on the environment?

However, there is a notably lower sense of accountability. In comparison, only a third of European adults feel their own food choices have a negative impact on the environment

- These perceptions of lower responsibility are mirrored across all countries
- Austrians in particular, are least likely to feel that the food they eat has a negative impact, despite the majority feeling that food production does have a negative impact

Impact of food we eat on environment - % Negative

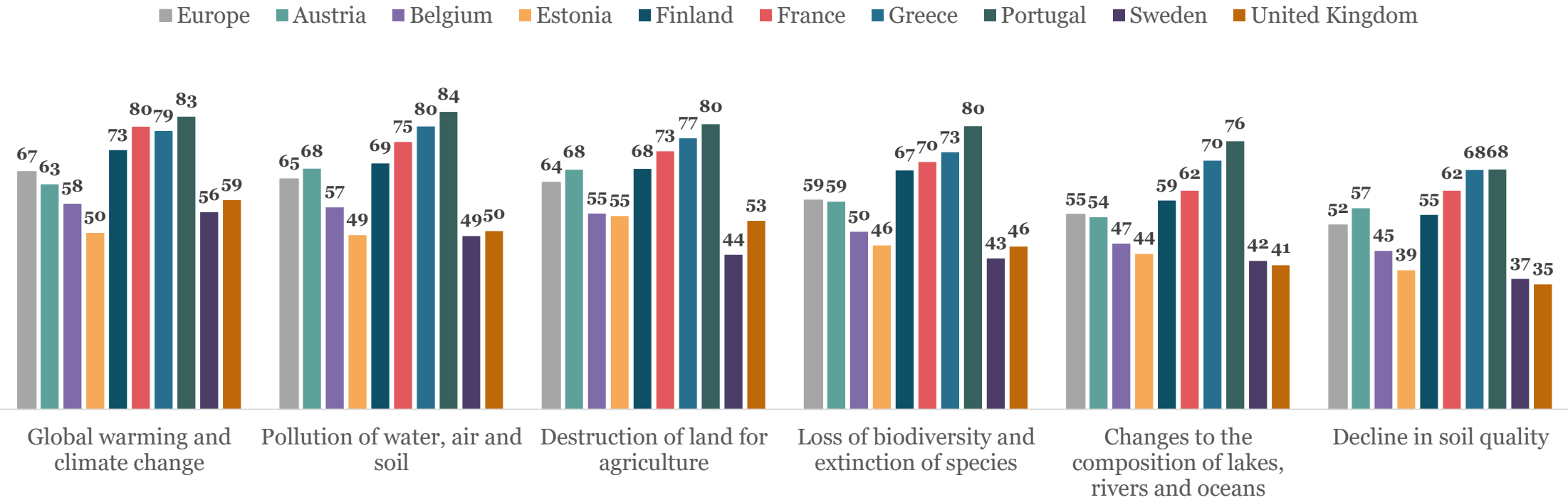


Q4: To what extent, if at all, do you think that the food that YOU eat has a positive or negative impact on the environment?

Global warming/climate change is the environmental factor that most people overall, are aware of as being impacted by food production and consumption. Closely followed by pollution and land destruction

- Those living in Portugal, France and Greece feel most knowledgeable about these issues
- Whereas, knowledge levels appear lower in Estonia, Sweden and the UK

Environmental impacts of food we produce and consume on a large scale -
% know a great deal / fair amount

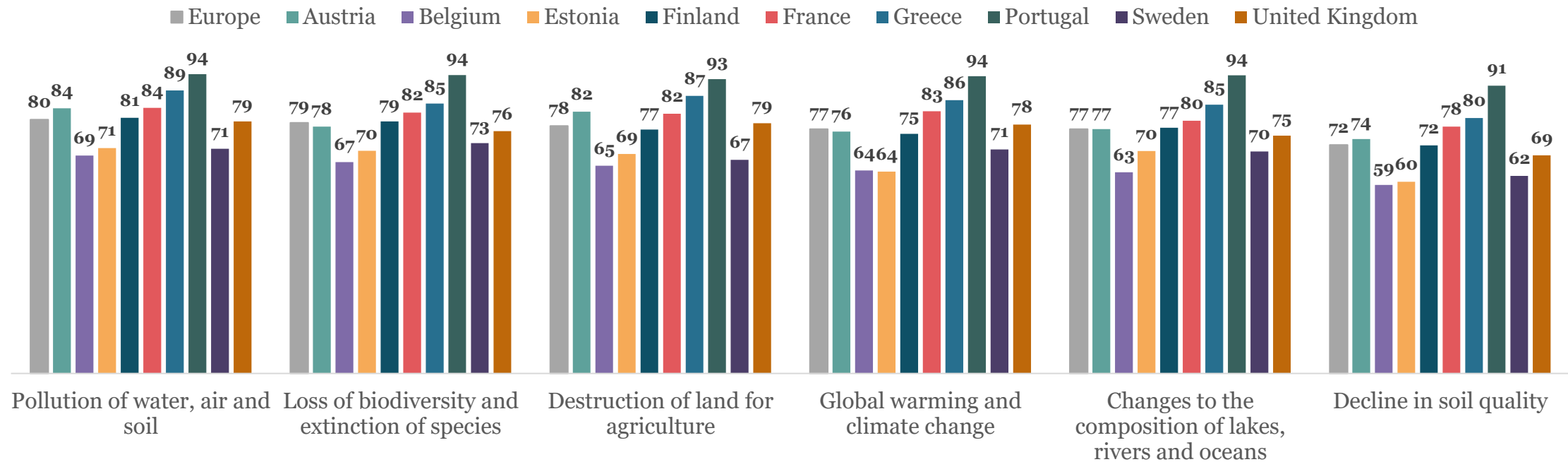


Q5: Before taking part in this survey, how much, if anything, would you say you knew about the following environmental impacts caused by the food we produce and consume on a large scale?

The majority of respondents are concerned about all these environmental factors. Pollution and risk of extinction are of most concern overall

- The level of concern is reflective of the level of knowledge they feel they possess
- An overwhelming majority of Portuguese respondents are concerned about all issues

Concerns about environmental impacts from food we produce and consume on large scale - % concerned



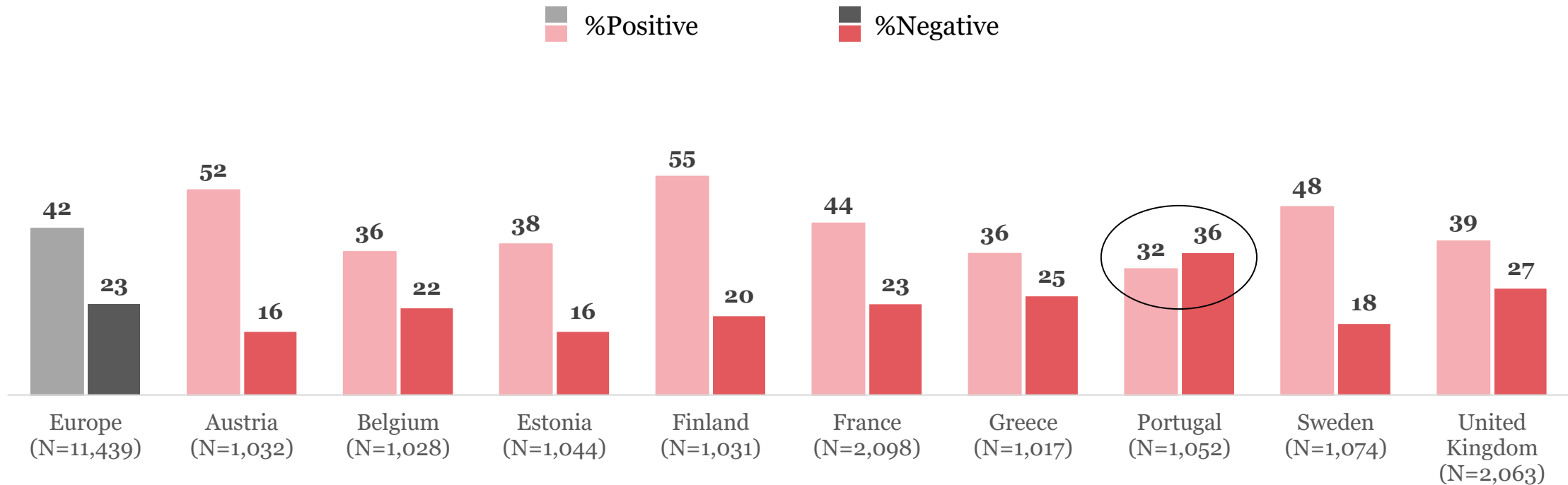
Q6: How concerned or unconcerned, if at all, are you about the following environmental impacts caused by the food we produce and consume on a large scale?

Base: those who have at least a little knowledge of decline in soil quality: Europe (9,500); Austria (919); Belgium (808); Estonia (787); Finland (868); France (1,876); Greece (931); Portugal (983); Sweden (833); UK (1,461)

Four in ten respondents feel that the food produced in their own country has a positive impact on the environment, whilst only a quarter feel it has a negative impact

- Those in Finland and Austria are most positive about their countries' food production
- Portugal is the only country where more people feel they have more of a negative impact

Impact on environment of food produced in your Country

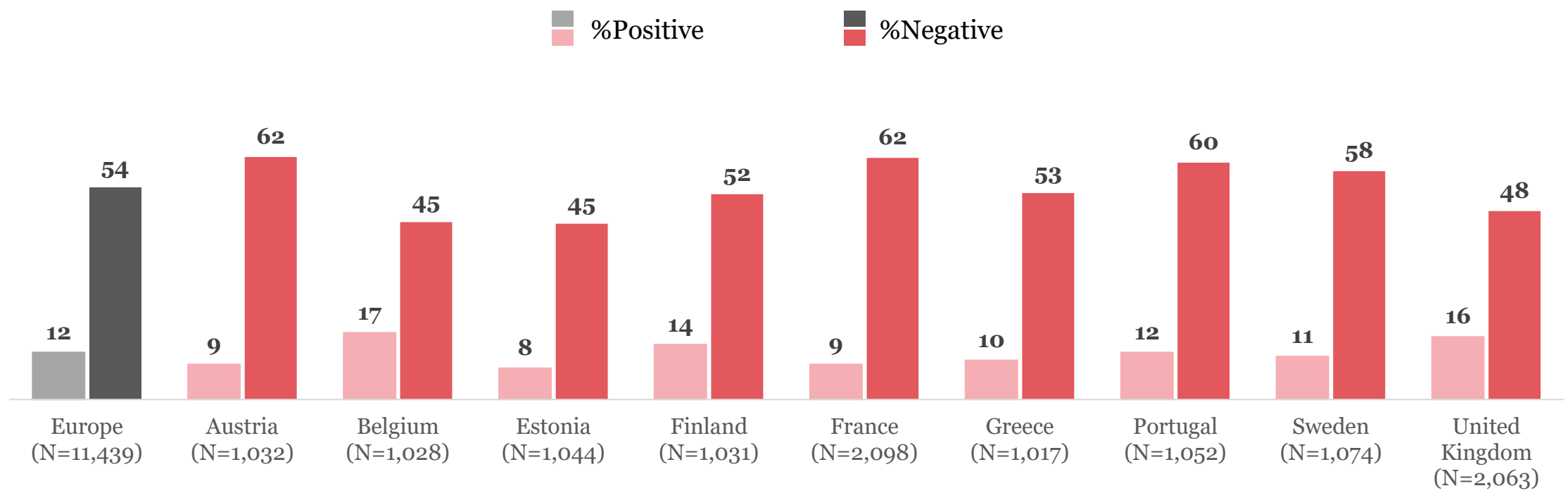


Q7: To what extent, if at all, do you think the two categories of food below have a positive or negative impact on the environment? Category 1: In your Country

Interestingly, over half of respondents overall believe that the food produced outside of their own country is having a negative impact on the environment

- This is felt most strongly in Austria, France and Portugal

Impact on environment of food not produced in your Country

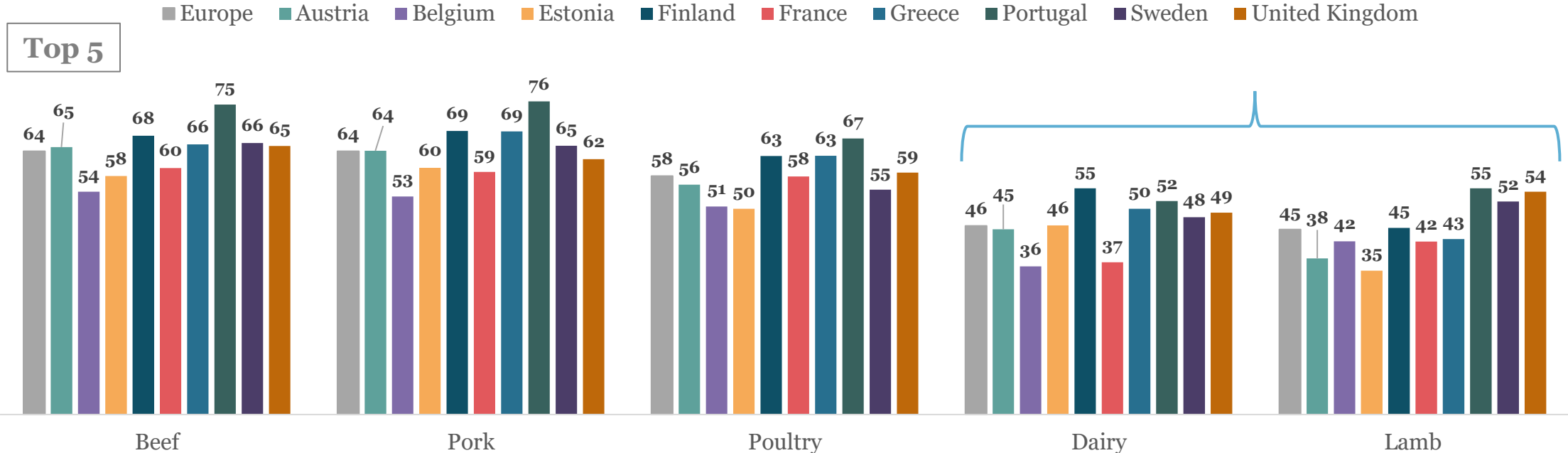


Q7: To what extent, if at all, do you think the two categories of food below have a positive or negative impact on the environment? Category 2: Outside your Country

Production of beef, pork and poultry are considered to have the biggest negative impact on the environment

- Across all countries, these three food types were most likely to be chosen as the top 5 negative contributors

Food types with most negative impact on environment – % chosen as 5 biggest negative impact

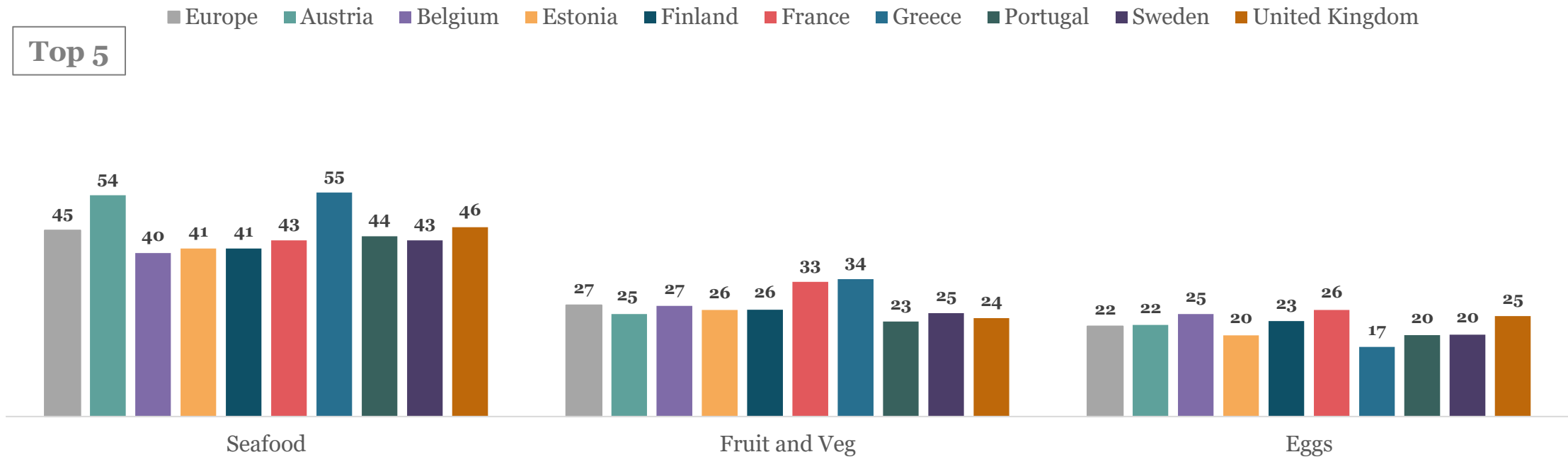


Q8: Which of the following do you think has the biggest negative impact on the environment, if any? Please select the top five and rank them in order of biggest negative impact

Fruit & veg and eggs are least likely to be selected as being in European adults' top 5 foods considered as having a negative impact on the environment

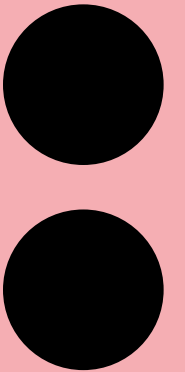
- Over half of adults in Austria and Greece select seafood in their top 5

Food types with most negative impact on environment –
% chosen as 5 biggest negative impact



Q8: Which of the following do you think has the biggest negative impact on the environment, if any? Please select the top five and rank them in order of biggest negative impact

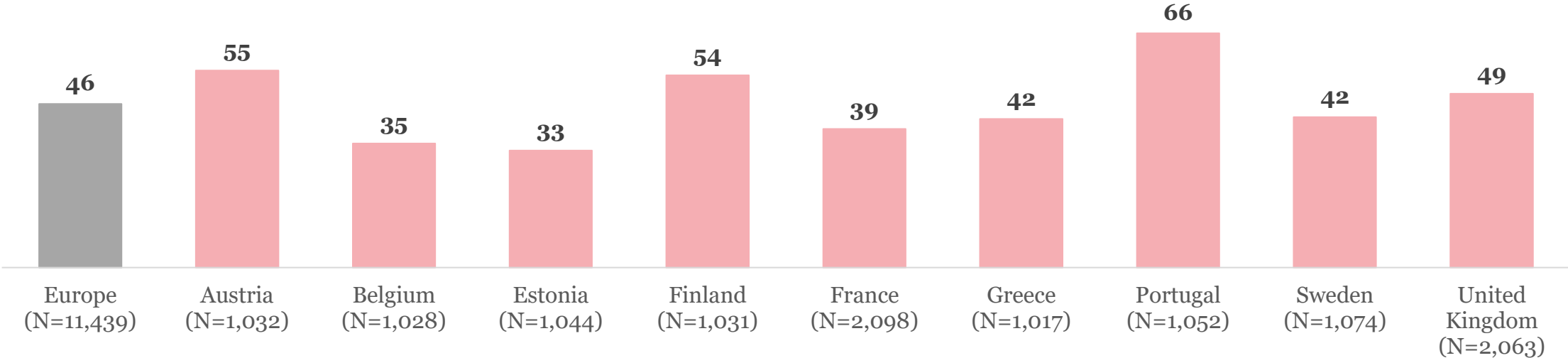
Knowledge, confidence and concern



Confidence in their knowledge of how to make food choices that are positive for the environment and sustainability is fairly low, with less than half feeling confident

- Portuguese respondents recorded the highest levels of confidence, followed by Austria and Finland
- Only a third of those from Belgium and Estonia feel confident in their knowledge

Confidence in knowledge of how to buy and eat more environmentally friendly and sustainable food - % Confident

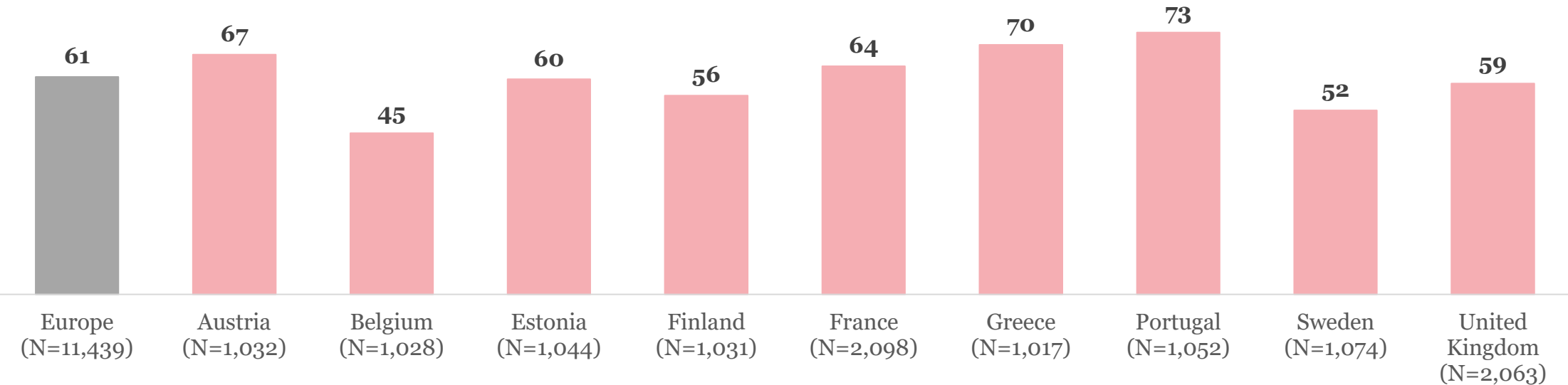


Q9: How confident or unconfident are you in your knowledge of how to buy and eat more environmentally friendly and sustainable food?

Despite this lack in confidence, almost two thirds of European adults say that they would choose foods that have a less damaging impact on the environment and sustainability

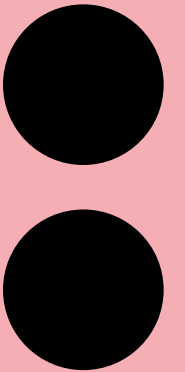
- Portuguese respondents again recorded the highest levels of likelihood, along with Greece, and Austria
- Although Estonia has the lowest level of confidence, 6 in 10 state they would be likely to choose sustainable foods

Likelihood to buy and eat food that is less damaging for the environment and is more sustainable - % Likely



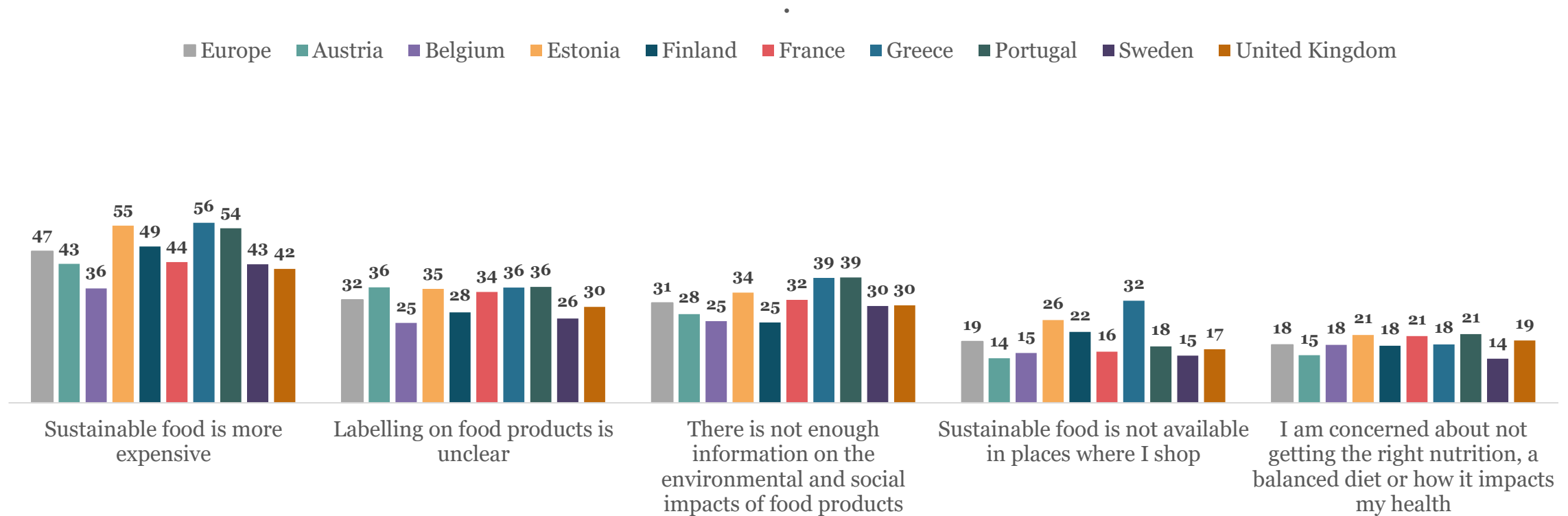
Q10: How likely or unlikely, if at all, are you to buy and eat food that is less damaging for the environment and is more sustainable? Sustainable food does not negatively impact the environment, the welfare of animals or human rights.

Barriers preventing sustainable food choices



Perceived expense is a barrier for almost half of respondents overall. Around a third feel there are information issues, in the clarity of labelling and lack of information on the impacts of food production

- High prices of sustainable foods is felt most strongly in Greece, Estonia and Portugal
- These barriers are less prominent in Belgium compared with the other countries



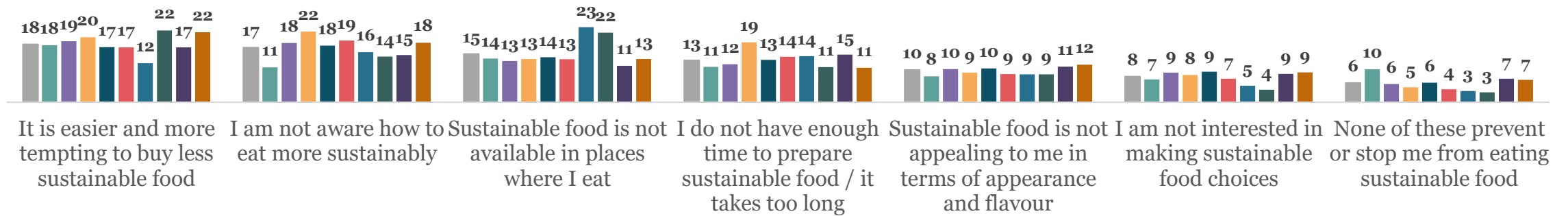
Q11: Which of the following, if any, **prevents or stops you** from eating types of food that are better for the environment and are more sustainable?

Very few say that they are not interested in making sustainable food choices. Under 10% in each country.

- Adults in Portugal and Greece are more likely to say that sustainable food is not available in places where they eat.

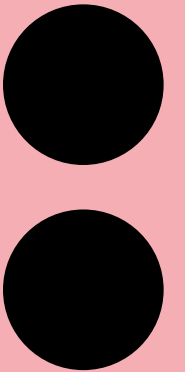
Barriers to eating types of food that are better for the environment and are more sustainable - % chosen as 5 biggest negative impact

■ Europe ■ Austria ■ Belgium ■ Estonia ■ Finland ■ France ■ Greece ■ Portugal ■ Sweden ■ United Kingdom



Q11: Which of the following, if any, **prevents or stops you** from eating types of food that are better for the environment and are more sustainable?

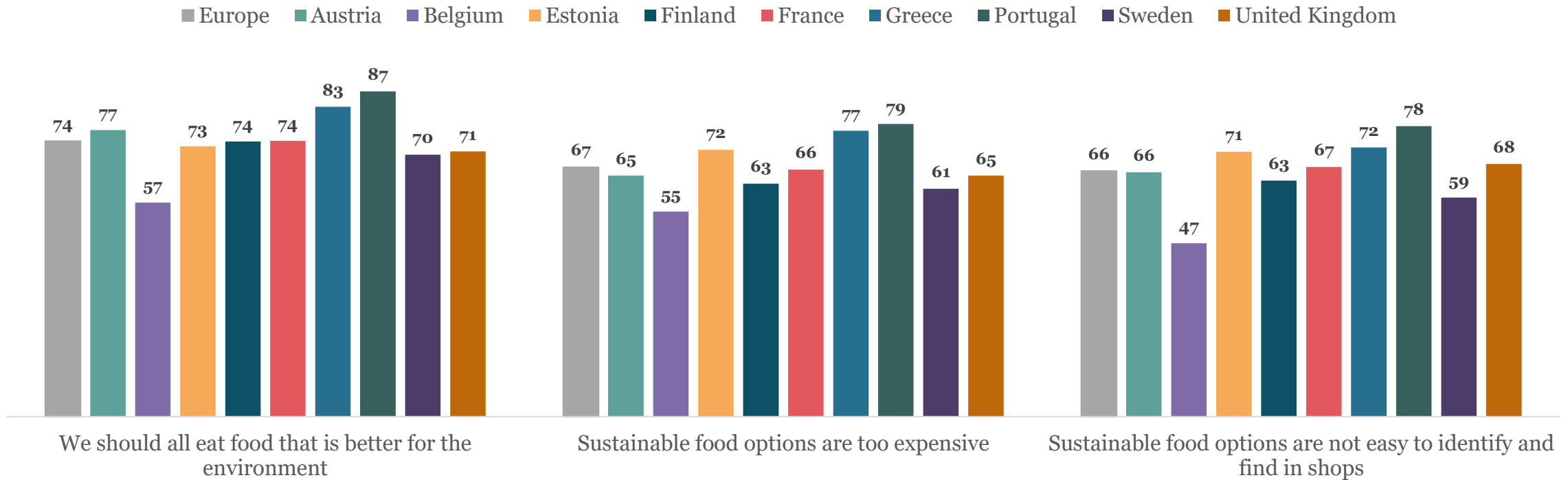
Sustainability, governance and behavioural change



The majority believe that everyone should make an effort to consume food that is better for the environment. However, many also feel that sustainable options are expensive and difficult to find.

- Portugal, Greece and Austria are most likely to agree that we should eat food that is better for the environment
- Difficulties with expense and identifying sustainable products is felt most strongly in Portugal, Greece and Estonia

Statements about behaviour change - % agree

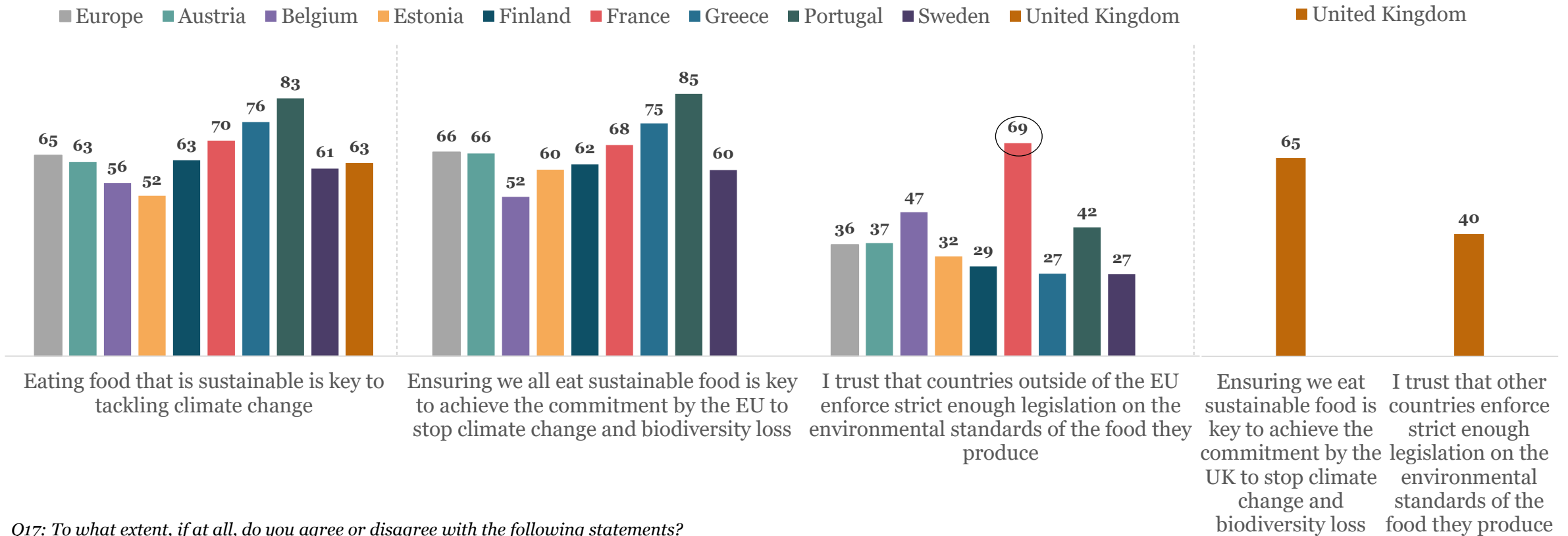


Q17: To what extent, if at all, do you agree or disagree with the following statements?

Two thirds of respondents believe that consuming sustainable food is key to tackling climate change. However, trust in other countries outside of the EU/UK to enforce environmental standards is low.

- Trust is notably higher in France though, as well as above average in Belgium, Portugal and the UK

Statements about behaviour change - % agree



Q17: To what extent, if at all, do you agree or disagree with the following statements?

Country summary

Austrians are high on engagement, confidence and individual responsibility.

Belgians are low on engagement – with low knowledge, concerns, confidence and likelihood to buy sustainable food. They are least supportive of initiatives and actions to enhance sustainable food production and consumption.

Estonians are willing to engage, but need more knowledge, confidence and easier access to less expensive sustainable food.

Finns regard themselves as knowledgeable and confident about sustainable food, and are particularly positive about the food produced in Finland.

The French tend to reflect the European average.

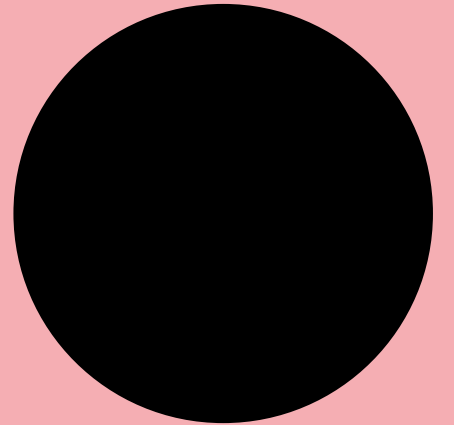
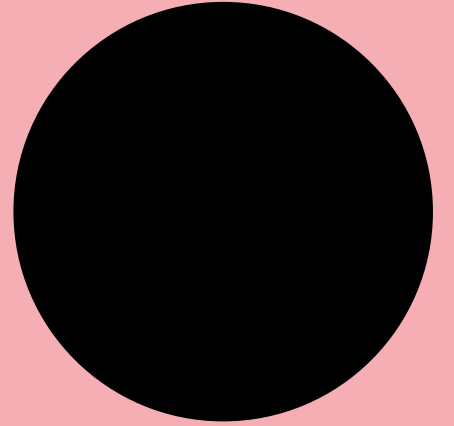
Greeks are highly knowledgeable, highly concerned, highly likely to buy – but not so confident on how to buy and eat sustainable food. They are highly motivated to change, but expense is a key barrier.

Portuguese are highly knowledgeable, concerned, confident and committed to food sustainability. They are highly critical of the negative environmental impacts of food production. They are the most highly motivated to change their food choices – but expense, availability and identification are key barriers.

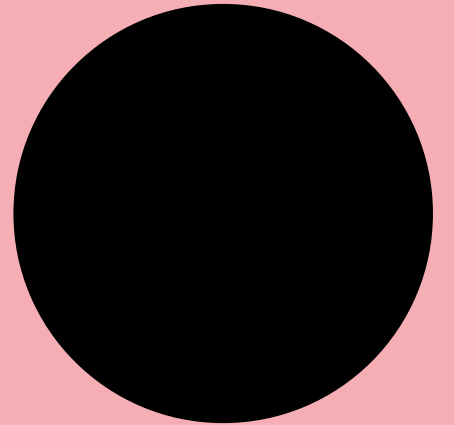
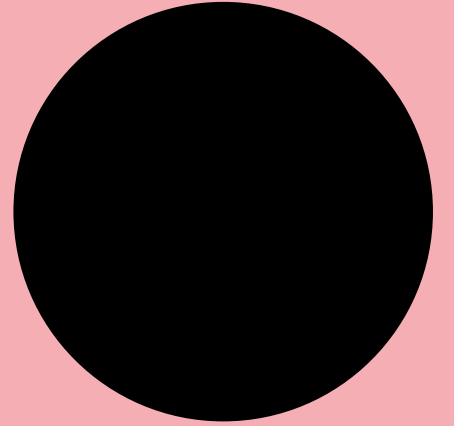
Swedes are amongst the least knowledgeable about the environmental impact caused by large scale food production and consumption. Levels of concerns, confidence and interest all tend to be below average.

Brits are amongst the least knowledgeable about the environmental impact caused by large scale food production and consumption. Levels of concerns, confidence and interest in sustainable food are average.

Appendix



Country summaries



Executive Summary – Austria key standouts

Austrians are high on engagement, confidence and individual responsibility.

High priority is placed on choosing sustainable food with regards to:

- buying locally grown food (63% v 51%*);
- buying food with higher animal welfare standards (46% v 34%*);
- buying food with minimal or no packaging (39% v 32%*);
- buying food that does not contain palm oil (33% v 23%*).

Confidence and interest is higher than average:

- knowing how to buy and eat more environmentally friendly and sustainable food (55% v 46%*);
- likelihood to buy food that is less damaging to the environment and is more sustainable (67% v 61%*).

They are highly positive about Austria's food production impact on the environment – but most negative about other countries' impact:

- own country's food production and consumption has a positive impact on the environment (52% v 42%*);
- other countries' food production and consumption has a negative impact on the environment (62% v 54%*);

* *Europe average*

Executive Summary – Belgium key standouts

Belgians are low on engagement – with low knowledge, concerns, confidence and likelihood to buy sustainable food. They are least supportive of initiatives and actions to enhance sustainable food production and consumption.

Lower priority is placed on choosing sustainable food with regards to:

- buying locally grown food (35% v 51%*);
- buying food with higher animal welfare standards (24% v 34%*).

There is low knowledge and concern about the environmental impacts caused by the food we produce and consume on a large scale, e.g. global warming and climate change:

- knowledge (58% v 67%*); concern (if aware) (64% v 77%*).

Confidence is lower – knowing how to buy and eat more environmentally friendly and sustainable food (35% v 46%*).

They are least likely to buy (45% v 61%*); and least likely to see the need to change their behaviour:

- we should all eat food that is better for the environment (57% v 74%).

* *Europe average*

Executive Summary – Estonia key standouts

Estonians are willing to engage, but need more knowledge, confidence and easier access to less expensive sustainable food.

Higher priority is placed on choosing sustainable food with regards to:

- buying the right amount of food (66% v 54%*);
- buying locally grown food (60% v 51%*);
- buying food with minimal or no packaging (41% v 32%*);
- buying unprocessed food (43% v 32%*).

There is lower knowledge and concern about the environmental impacts caused by the food we produce and consume on a large scale, e.g. global warming and climate change:

- knowledge (50% v 67%*); concern (if aware) (64% v 77%*).

Confidence levels are low for knowing how to buy and eat more environmentally friendly and sustainable food (33% v 46%*).

Likelihood to buy is good (60% v 61%*), but prevention barriers are particularly strong concerning:

- sustainable food is more expensive (55% v 47%*);
- sustainable food is not available in places where I shop (26% v 19%).

** Europe average*

Executive Summary – Finland key standouts

Finns regard themselves as knowledgeable and confident about sustainable food, and are particularly positive about the food produced in Finland.

Their differences in priorities in choosing sustainable food, reflect some of the limitation they have due to geography:

- buying seasonal food (37% v 48%*) and buying unprocessed food (25%% v 32%*) are both low in priority.

Their levels of knowledge about the environmental impacts caused by the food we produce and consume on a large scale are above average – but levels of concerns are no more than are average.

They have a positive stance to their home grown food:

- impact on environment of food produced in your country (55% v 42%* positive).

Confidence is higher than average in knowing how to buy and eat more environmentally friendly and sustainable food (54% v 46%*), but not sufficient to promote strong interest in sustainable food:

- likelihood to buy is a little below average (56% v 61%*).

* *Europe average*

Executive Summary – France key standouts

The French tend to reflect the European average.

However:

- they place greater importance on choosing seasonal food – this is their top priority (57% v 48%*);
- ...despite having a stronger view of the negative environmental impact of food not produced in France (62% v 54%* negative).

* *Europe average*

Executive Summary – Greece key standouts

Greeks are highly knowledgeable, highly concerned, highly likely to buy – but not so confident on how to buy and eat sustainable food. They are highly motivated to change, but expense is a key barrier.

High priority is placed on choosing sustainable food with regards to:

- buying food that is in season (60% v 48%*);
- buying locally grown food (59% v 51%*);
- buying food with higher animal welfare standards (40% v 34%*);
- buying unprocessed foods (40% v 32%*).

They are highly aware and highly concerned about all aspects of environmental impacts caused by the food we produce and consume on a large scale.

Likelihood to buy sustainable food is high (70% v 61%*) and there is strong motivation to change their food choices:

- strong agreement that we should all eat food that is better for the environment (83% v 74%*).

But there are strong barriers to change:

- confidence is lower than average in knowing how to buy and eat more environmentally friendly and sustainable food (42% v 46%*);
- sustainable food options are regarded as too expensive (77% v 67%*);
- expense prevents them from eating food that is better for the environment (56% v 47%*).

* *Europe average*

Executive Summary – Portugal key standouts

Portuguese are highly knowledgeable, concerned, confident and committed to food sustainability. They are highly critical of the negative environmental impacts of food production. They are the most highly motivated to change their food choices – but expense, availability and identification are key barriers.

High priority is placed on choosing sustainable food with regards to:

- buying the right amount of food and paying attention to expiry dates to reduce food waste (65% v 54%*);
- buying food that is in season (61% v 48%*);
- buying unprocessed foods (41% v 32%*).

They are highly aware and highly concerned about all aspects of environmental impacts caused by the food we produce and consume on a large scale. And they are highly committed to the environmental cause:

- ensuring we all eat sustainable food is key to achieving commitments made by EU to stop climate change and biodiversity loss (85% v 66%*);
- eating food that is sustainable is key to tackling climate change (83% v 65%*).

Continued ...

* *Europe average*

Executive Summary – Portugal key standouts

...Continued

They are most critical of food production's impact on the environment:

- food produced in their country is not positively viewed for impact on the environment (32% v 42%* positive)
- food produced outside their country is negatively viewed for impact on the environment (60% vs 54%* negative)

They are highly motivated to change:

- confidence in knowing how to buy sustainable food is high (66% v 46%*);
- likelihood to buy and eat food that is less damaging for the environment and is more sustainable, is high (73% v 61%*);
- strong agreement that we should all eat food that is better for the environment (87% v 74%*).

But there are strong barriers to change:

- sustainable food options are regarded as too expensive (79% v 67%*);
- sustainable food options are not easy to identify and find in shops (78% v 68%*).

** Europe average*

Executive Summary – Sweden key standouts

Swedes are amongst the least knowledgeable about the environmental impact caused by large scale food production and consumption. Levels of concerns, confidence and interest all tend to be below average.

When choosing food, they place higher than average importance on:

- buying food with higher animal welfare standards (40% v 34%*);
- buying food that does not contain palm oil (29% v 23%*);
- buying food with environmental certification (28% v 22%*).

Confidence in knowing how to buy and eat more environmentally friendly and sustainable food is a little below average (42% v 46%*).

They are less likely to buy and eat sustainable food that is less damaging for the environment (52% v 61%*).

They just seem to be a little less engaged than average, across the board.

* *Europe average*

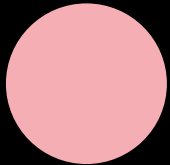
Executive Summary – UK key standouts

UK citizens are amongst the least knowledgeable about the environmental impact caused by large scale food production and consumption. Levels of concerns, confidence and interest in sustainable food are average.

When choosing food, they place higher than average importance on:

- buying food with minimal packaging (41% v 32%*);
- buying food unprocessed food (36% v 32%*);
- buying food from companies that pay and treat their workers fairly (33% v 25%*).

** Europe average*

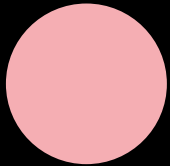


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