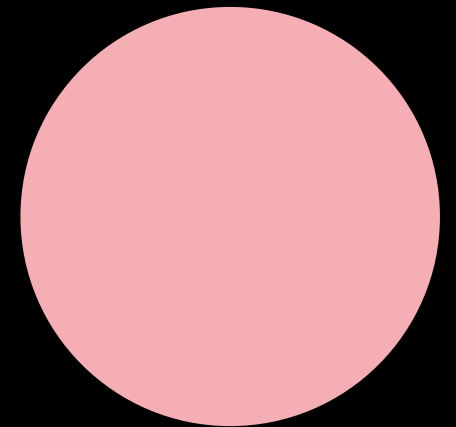


WWF Food Habits Survey 2023



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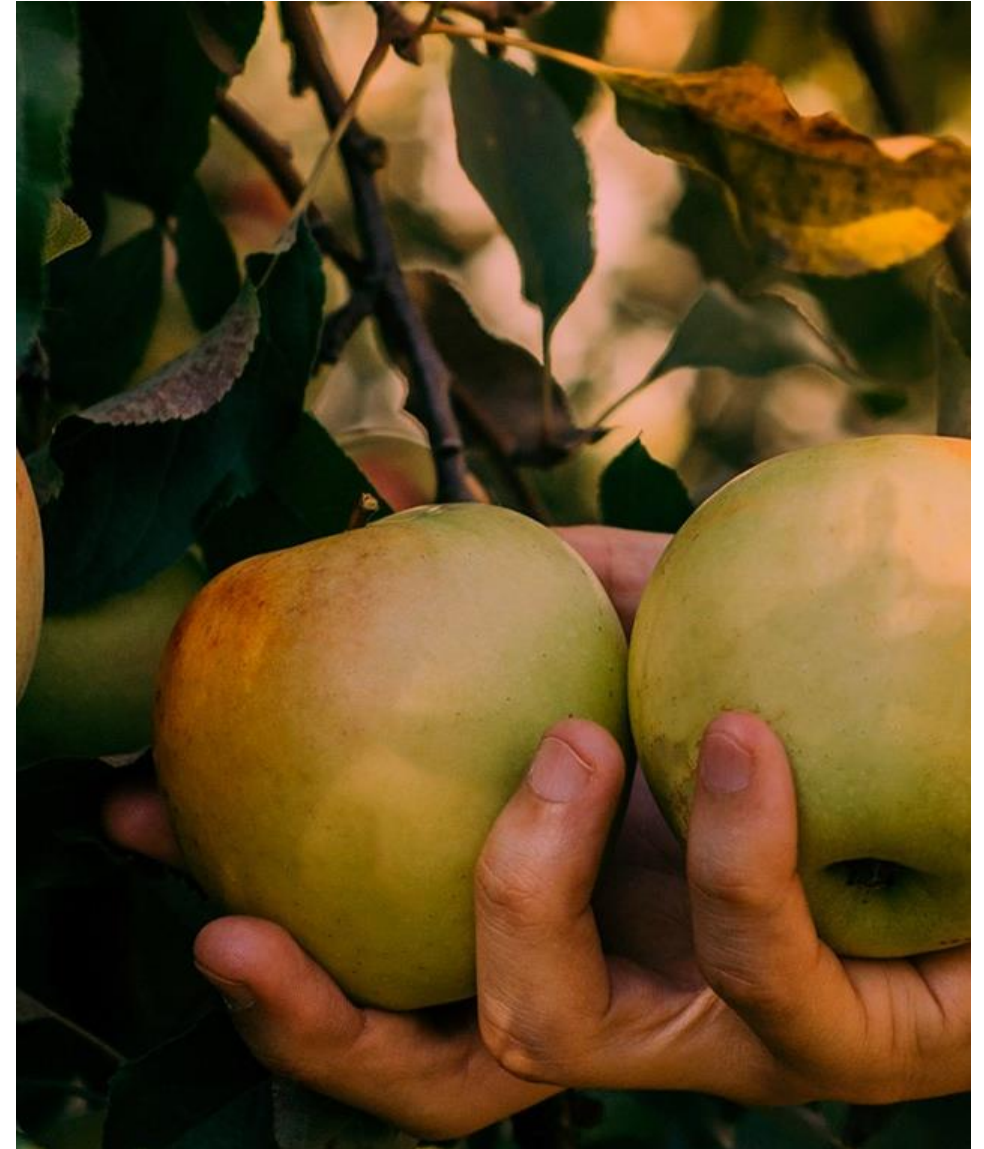
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Background and objectives

In 2023 WWF commissioned a survey of adults in 11 EU countries (Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain and Poland) plus the UK, as part of the third wave of the Eat4Change project, with funding from the European Union, WWF-DE and WWF-Int.

Eat4Change aims to engage citizens on the topic of sustainable food, highlighting global interconnections and dependencies and demonstrating how individual lifestyle choices can directly contribute to limiting climate warming.

The countries surveyed in all three years are Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, and the UK. Germany, Spain and Poland were surveyed in 2022 and 2023. Mexico and Romania were only surveyed in 2022.



Methodology

In 2023, Savanta interviewed 17,931 adults aged 18-65 across 12 countries via a 10 minute online survey. Full details of sample may be found in the table to the right.

Questions 1-11 in the 2023 survey were kept the same as in the previous two surveys, and questions 18-19 the same as in 2022, to ensure comparability. Question 12 (wave 3) – question 18 (wave 3) are questions unique to this survey, and their findings are discussed in the Policy chapter.

Fieldwork took place between 10th March and 4th April 2023. The first wave of the Eat4Change survey was conducted between the 22nd February and 18th March 2021, while the second took place between the 21st June and 7th July 2022.

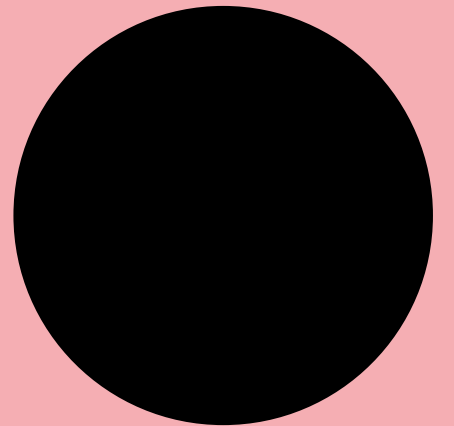
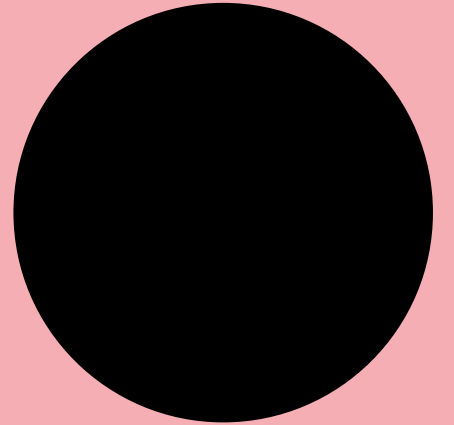
Data were weighted per country by age, gender and region to be nationally representative by country. All countries were weighted to be equally represented in the combined Wave 3 and Wave-on-Wave tables.

Please note that differences referred to in the following report are ‘significant’, in that the differences are statistically significant to a confidence level of 95%.

Sample

Country	Wave One Base	Wave Two Base	Wave Three Base
Total	11,439	19,922	17931
Austria	1032	1004	1091
Belgium	1028	1000	1019
Estonia	1044	1013	1085
Finland	1031	1007	1081
France	2098	2017	2019
Greece	1017	1048	1113
Portugal	1052	1097	1101
Sweden	1074	1014	1090
United Kingdom	2063	2015	2035
Germany	n/a	2044	2067
Spain	n/a	2009	2110
Poland	n/a	2008	2120
Romania	n/a	1073	n/a
Mexico	n/a	1573	n/a

Section One: Responsibility & Action

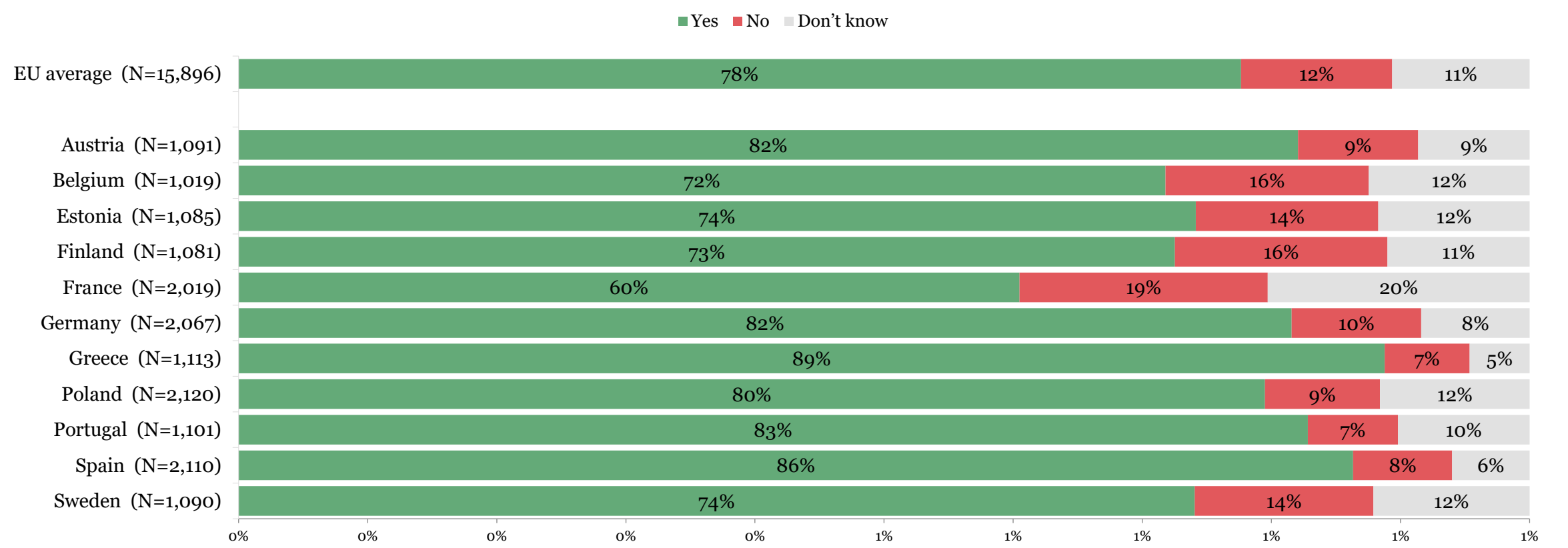


Executive Summary

- Eight out of ten EU respondents (78%), and a majority in each country, agree that public sector canteens in the EU should always provide at least one plant-based option.
- Just under half of EU respondents (47%) say that public sector canteens should ensure that more than half of the food they serve each day should be sustainably produced.
- EU respondents are most likely to say that large food manufacturers have full/a lot of responsibility for ensuring the food they sell is sustainably produced (75%), and least likely to attribute this level of responsibility to small or medium-sized retailers (45%).
- EU respondents were most likely (71%) to say they believe that food retail businesses must reduce their greenhouse gas emissions, and least likely (53%) to say they believe that food retail businesses must stop advertising or promoting their least sustainable products.
- Over three quarters of EU respondents believe that in future sustainable food should cost the same or less than unsustainable food (77%).
- Of those EU respondents who believe that in future sustainable food should be cheaper than unsustainable food, two thirds (66%) believe this should be achieved by making sustainable food cheaper, to encourage consumers to buy it.

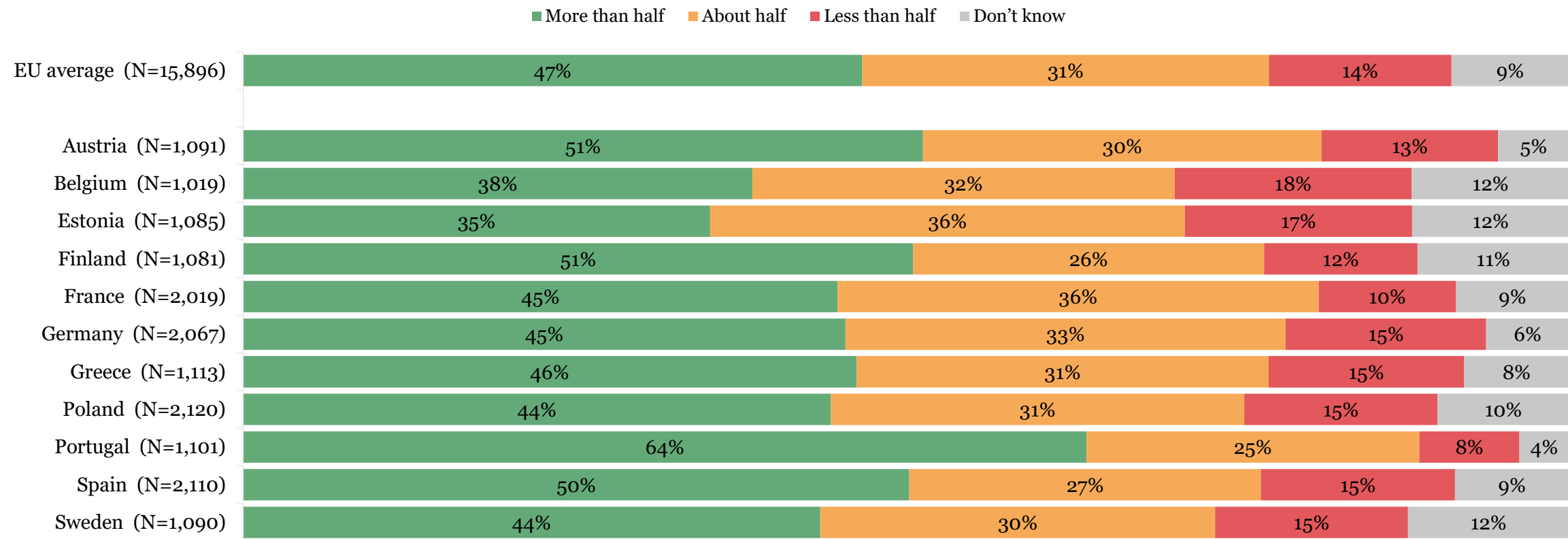
A majority of respondents in every EU country surveyed agree that public sector canteens in the EU should always provide at least one plant-based option

The proportion of respondents in the EU/each country that agree or disagree that public sector canteens in the EU should always provide at least one plant-based option



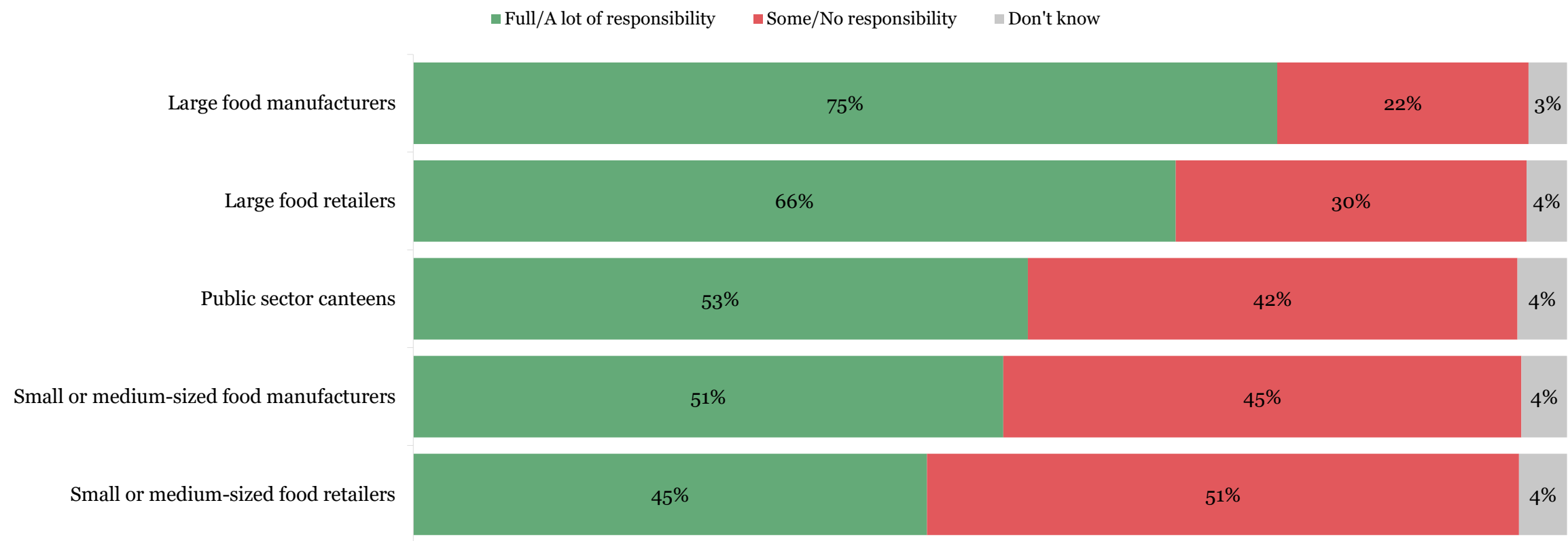
Just under half of EU respondents say that public sector canteens should ensure that more than half of the food they serve each day should be sustainably produced

The proportion of respondents in the EU/each country that believe public canteens should ensure that more than half, about half or less than half of the food they serve each day, should be sustainably produced



EU respondents are most likely to say that large manufacturers have full/a lot of responsibility for ensuring the food they sell was produced sustainably

The proportion of EU respondents who attribute each level of responsibility for ensuring that the food they sell is sustainable, to each organisation

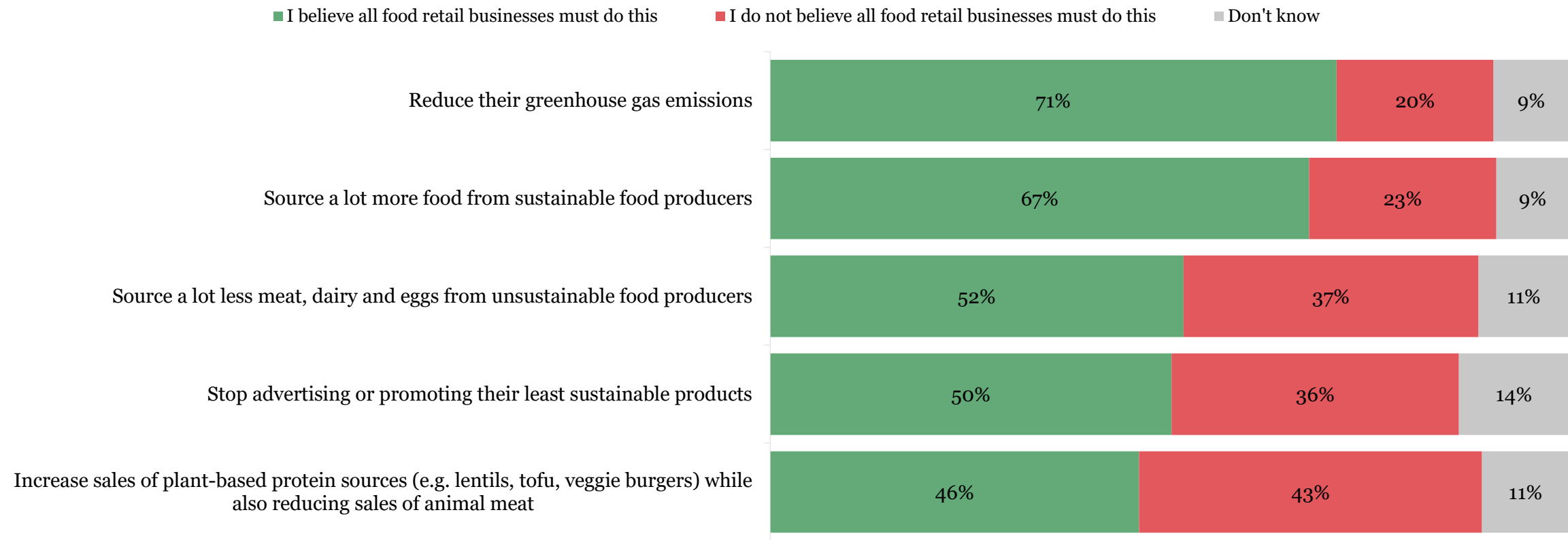


Q14W3. How much responsibility, if any, do you think the following organisations have for ensuring the food they sell was produced sustainably?

9 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland, 2023 (n=15896).

Of the options presented, EU respondents were most likely to say food retail businesses must reduce their greenhouse gas emissions

The proportion of EU respondents who believe, or do not believe, that food retail businesses must do the following



Q15W3. Which of the following do you believe all food retail businesses (e.g. multinational and local supermarkets, grocery shops, etc.) must do, if they are to continue to sell food within the EU?

¹⁰ Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland, 2023 (n=15896).

Estonian respondents are less likely than those in every other EU country to say that food retail businesses must reduce their greenhouse gas emissions, though a majority does still make this statement

The proportion of respondents in the EU/each country who believe that food retail businesses must reduce their greenhouse gas emissions

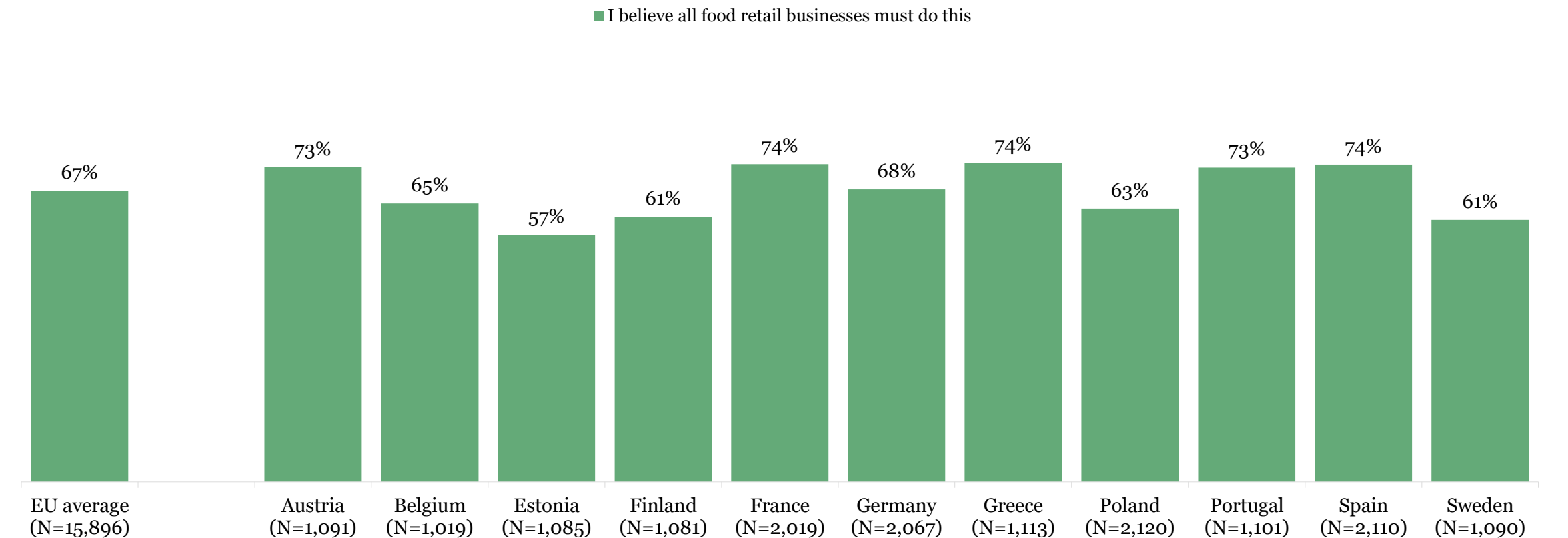


Q15W3. Reduce their greenhouse gas emissions: Which of the following do you believe all food retail businesses (e.g. multinational and local supermarkets, grocery shops, etc.) must do, if they are to continue to sell food within the EU?

¹¹ Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland

Estonian respondents are less likely than those in most other countries to say that food retail businesses must source a lot more food from sustainable food producers

The proportion of respondents in the EU/each country who believe that food retail businesses must source a lot more food from sustainable food producers



Q15W3. Source a lot more food from sustainable food producers: Which of the following do you believe all food retail businesses (e.g. multinational and local supermarkets, grocery shops, etc.) must do, if they are to continue to sell food within the EU?
12 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland

Finnish respondents are less likely than those in most other countries to say food retail businesses must source a lot less meat, dairy and eggs from unsustainable food producers

The proportion of respondents in the EU/each country who believe that food retail businesses must source a lot less meat, dairy and eggs from unsustainable food producers



French respondents were more likely than those in every other country to say that food retail businesses must stop advertising or promoting their least sustainable products

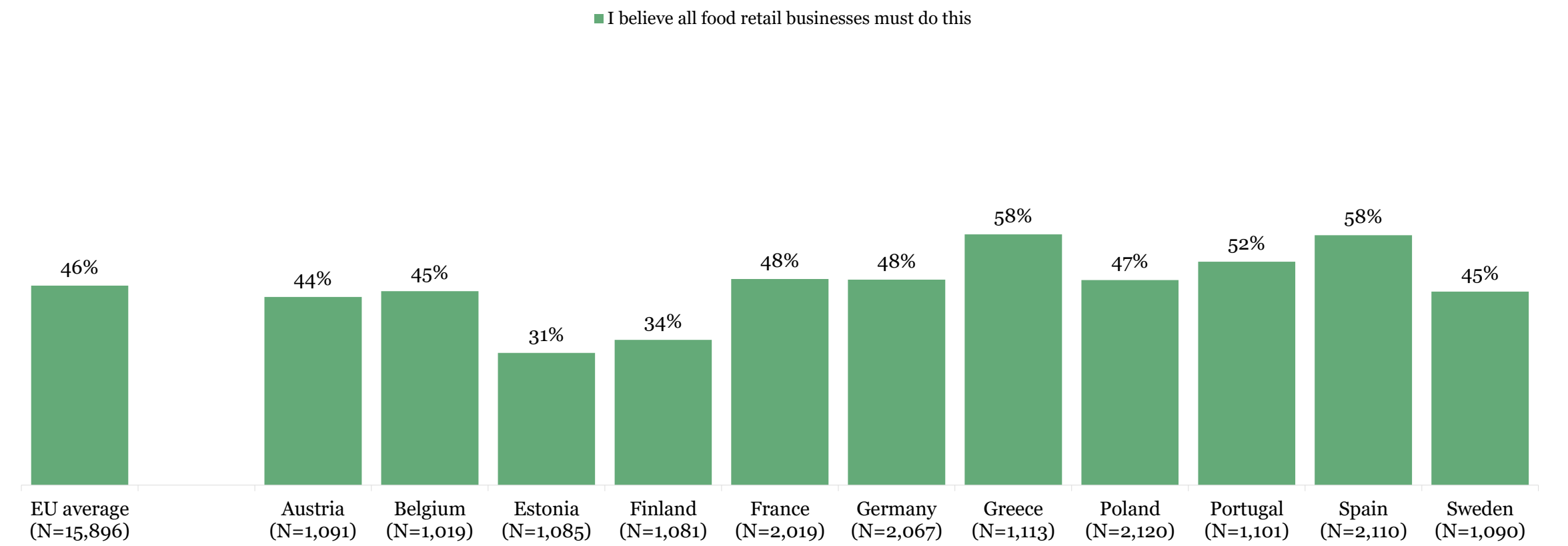
The proportion of respondents in the EU/each country who believe that food retail businesses must stop advertising or promoting their least sustainable products



14 Q15W3. Stop advertising or promoting their least sustainable products: Which of the following do you believe all food retail businesses (e.g. multinational and local supermarkets, grocery shops, etc.) must do, if they are to continue to sell food within the EU?
Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland

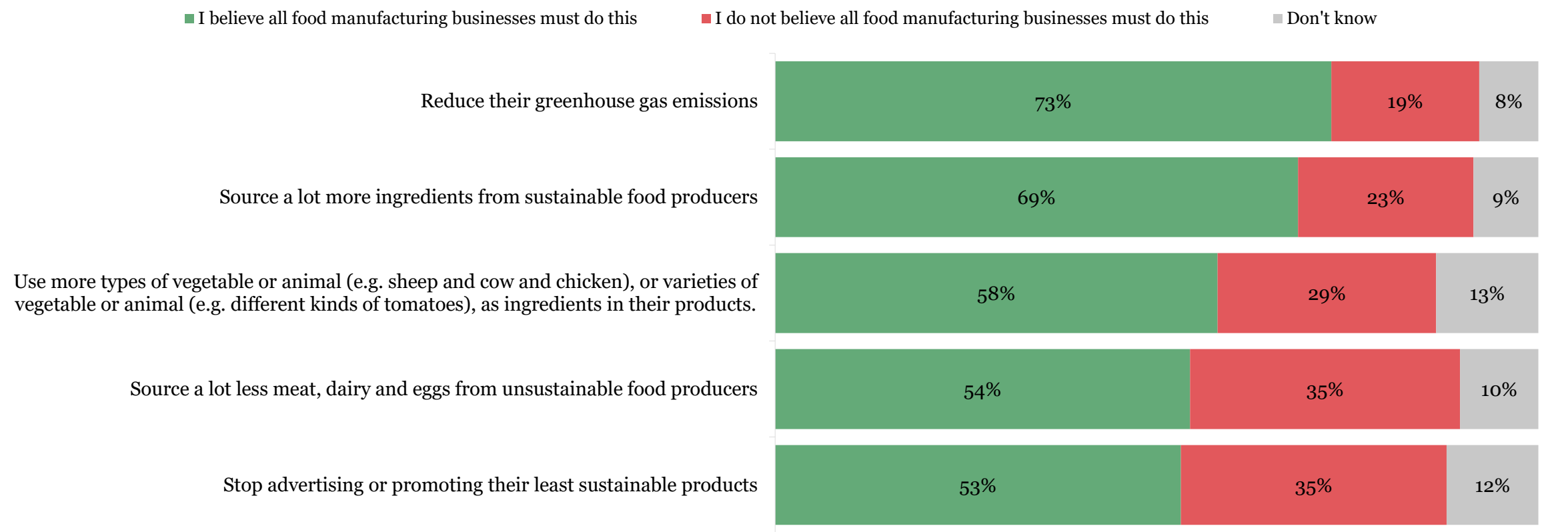
Greek and Spanish respondents are more likely than those in every other country to say that food retail businesses must increase sales of plant-based protein sources, while also reducing sales of animal meat

The proportion of respondents in the EU/each country who believe that food retail businesses must increase sales of plant-based protein sources, while also reducing sales of animal meat



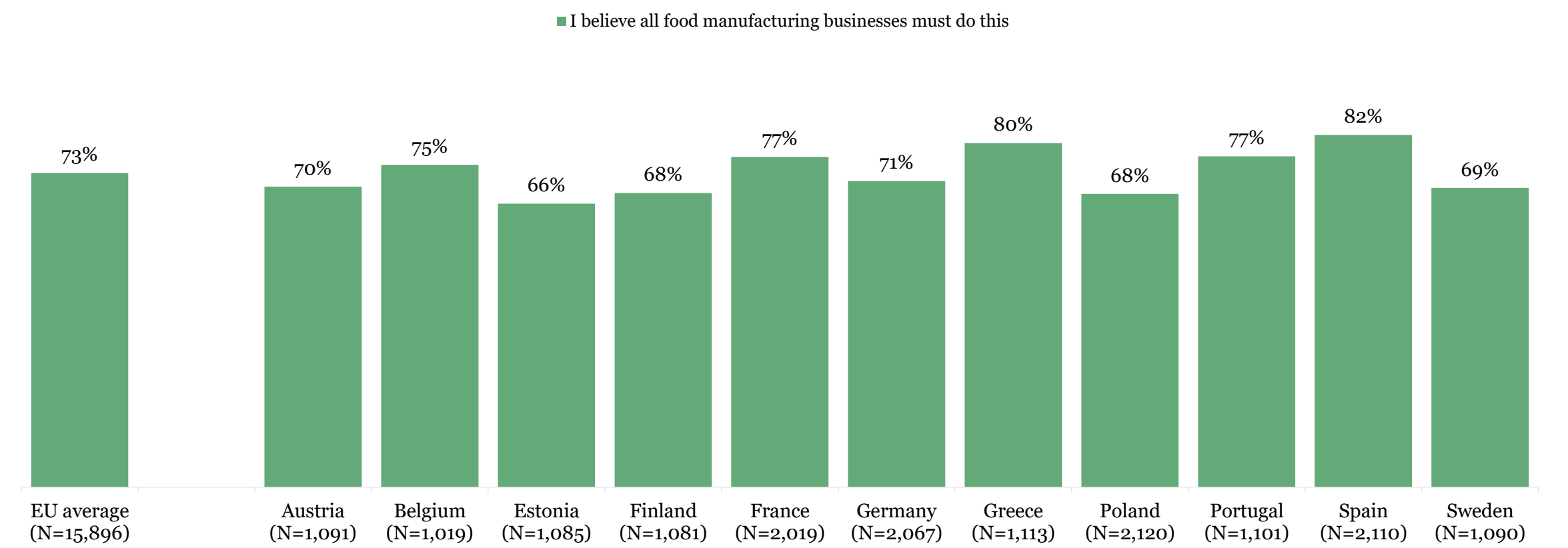
Of the options presented, EU respondents were most likely to say food manufacturing businesses must reduce their greenhouse gas emissions

The proportion of EU respondents who believe, or do not believe, that food manufacturing businesses must do the following



Spanish respondents are more likely than those in most other countries to say that food manufacturing businesses must reduce their greenhouse gas emissions

The proportion of respondents in the EU/each country who believe that food manufacturing businesses must reduce their greenhouse gas emissions



Spanish and Portuguese respondents are more likely than those in most other countries to say that food manufacturing businesses must source a lot more ingredients from sustainable food producers

The proportion of respondents in the EU/each country who believe that food manufacturing businesses must source a lot more ingredients from sustainable food producers



Spanish respondents are more likely than those in every other country to say food manufacturing businesses must use more types of vegetable or animal (e.g. sheep and cow and chicken), or varieties of vegetable or animal (e.g. different kinds of tomatoes), as ingredients in their products.

The proportion of respondents in the EU/each country who believe that food manufacturing businesses must use more types of vegetable or animal, or varieties of vegetable or animal as ingredients in their products



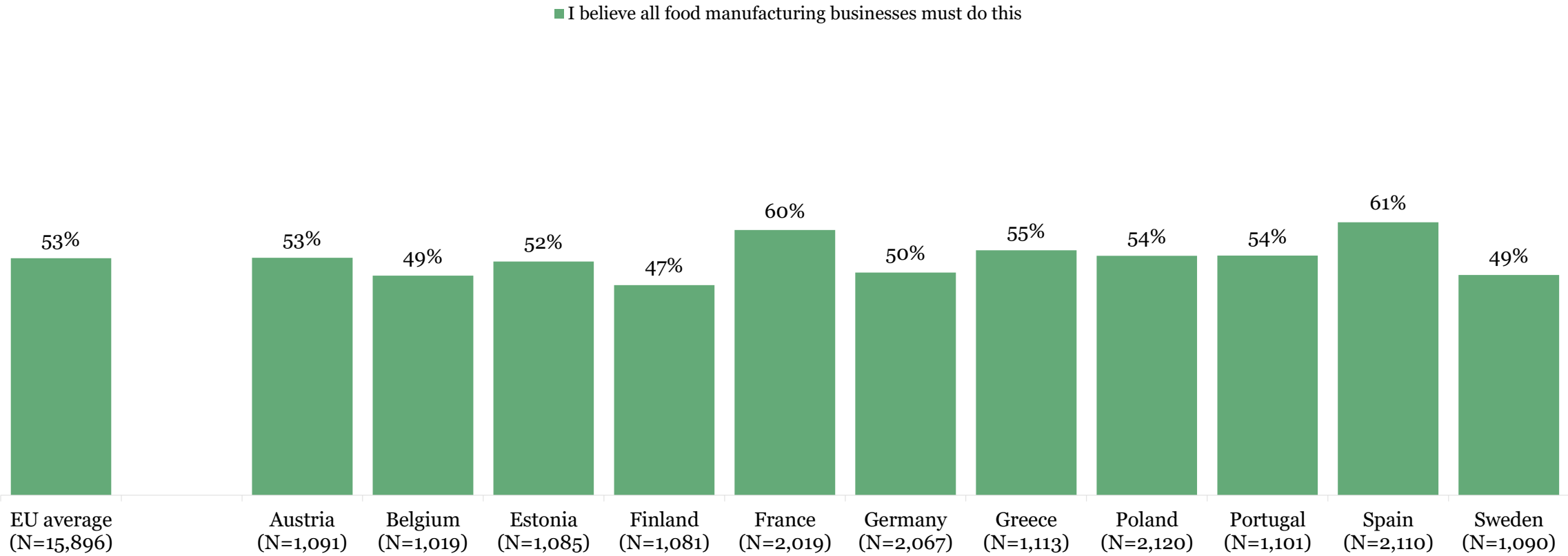
Spanish respondents are more likely than those in most other countries to say that food manufacturing businesses must source a lot less meat, dairy and eggs from unsustainable food producers

The proportion of respondents in the EU/each country who believe that food manufacturing businesses must source a lot less meat, dairy and eggs from unsustainable food producers



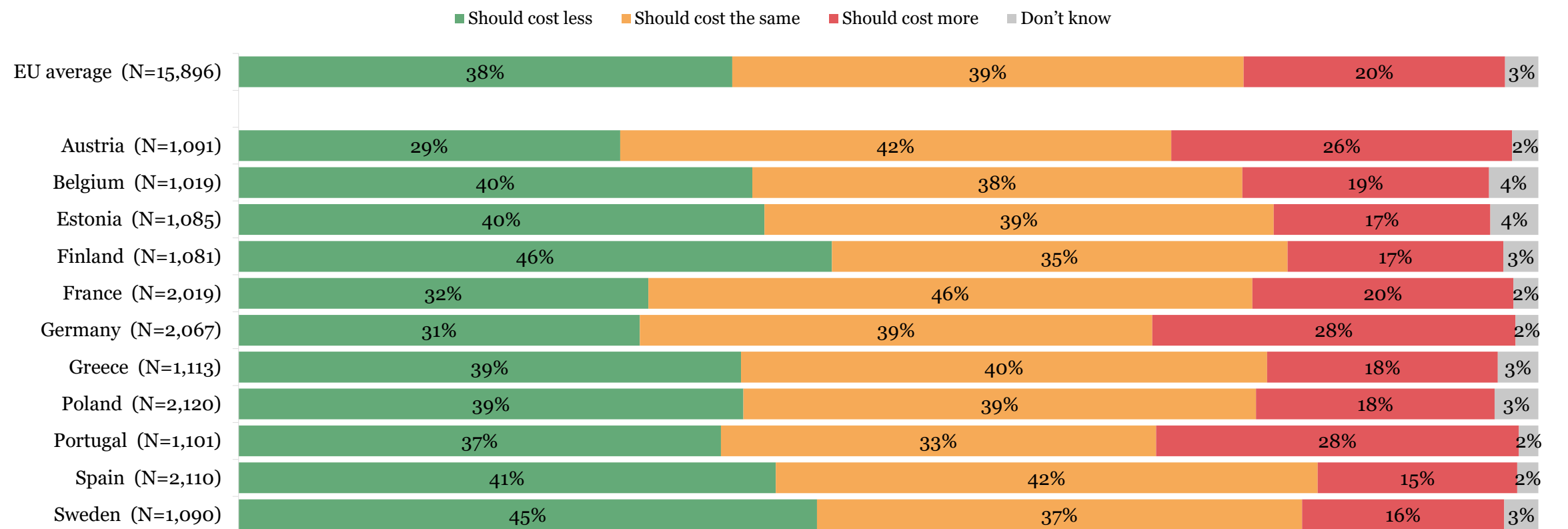
French and Spanish respondents are more likely than those in every other country to say they believe food manufacturing businesses must stop advertising or promoting their least sustainable products

The proportion of respondents in the EU/each country who believe that food manufacturing businesses must stop advertising or promoting their least sustainable products



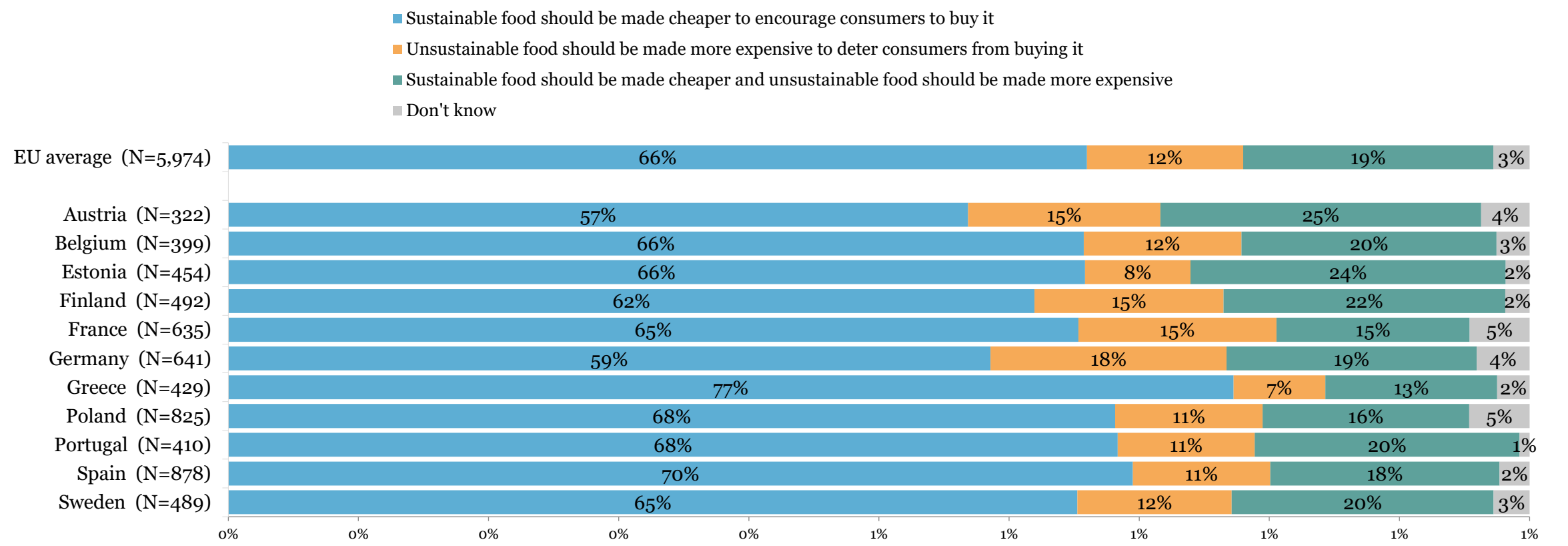
Over three quarters of EU respondents believe that in future sustainable food should either cost the same, or less, than unsustainable food

The proportion of respondents in the EU/each country who believe that in the future sustainable food should cost the same or less, or more than unsustainable food

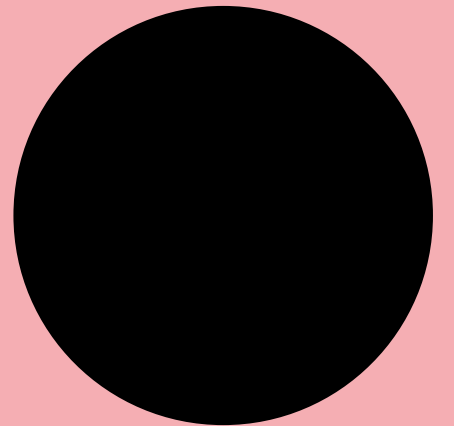
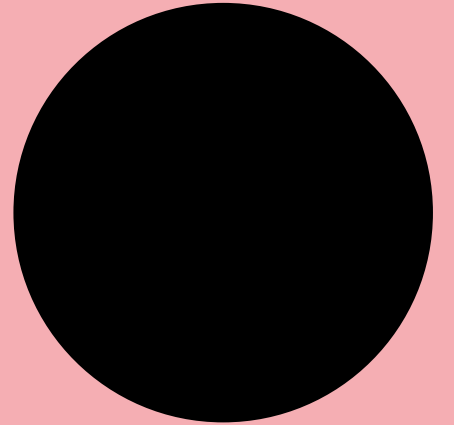


Of those EU respondents who believe that in future sustainable food should be cheaper than unsustainable food, two thirds believe that this should be achieved by making sustainable food cheaper to encourage consumers to buy it

The proportion of respondents in the EU/each country, who believe that in the future sustainable food should cost less, who selected each option as the way to achieve that goal



Section Two: The Relative Importance of Sustainable Food for EU Citizens, 2022-2023

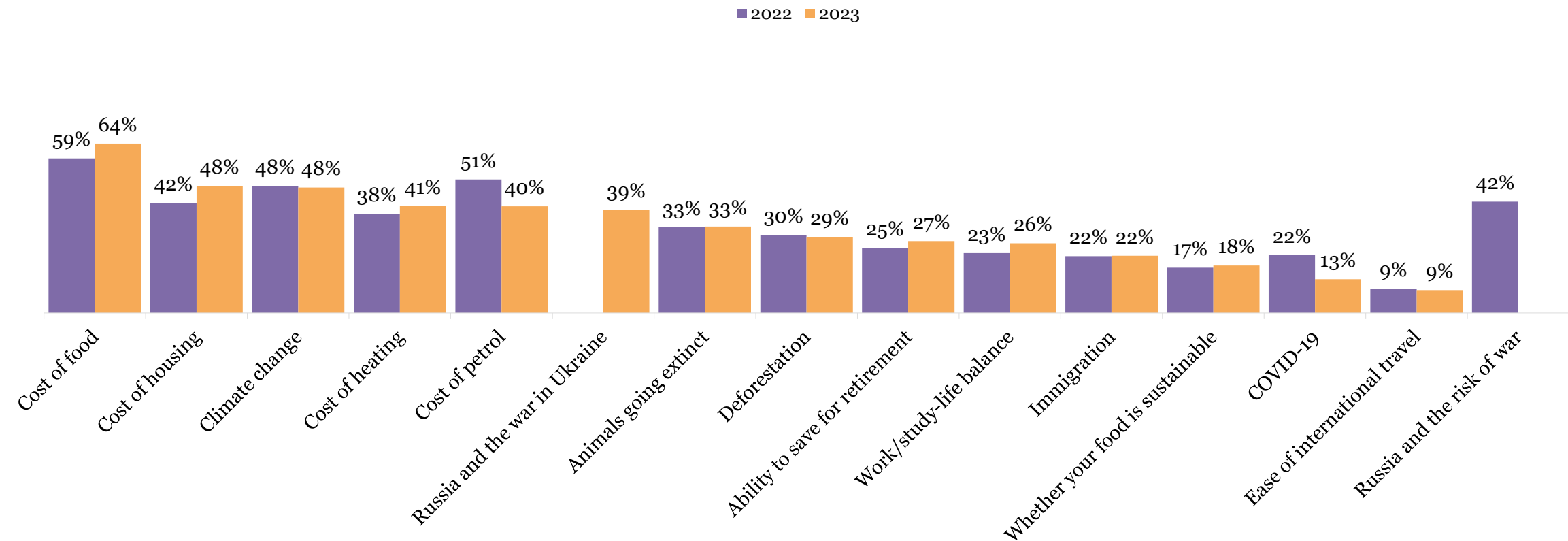


Executive Summary

- Less than one in five EU respondents (18%) select ‘whether your food is sustainable’ as one of the top five most important issues to them personally, the same as in 2022 (17%).
- Just under half of respondents report that this issue has become more important to them over the last 12 months (47%), the same as in 2022 (47%).
- However, this lack of change is still significant given the escalation of the cost of living crisis. EU respondents in 2023 are more likely to select the cost of food (64% in 2023 vs 59% in 2022), housing (48% vs 42%) and heating (41% vs 38%) as one of their top five most important issues, than they were in 2022. As such, even if the perceived importance of sustainable food is not widespread, it is at least durable.
- However, increased sensitivity to costs is having an effect. An increased proportion of EU respondents select sustainable food being more expensive as something that prevents or stops them from eating it, in 2023 than in 2022 and 2021 (56% in 2023 vs 52% in 2022 and 47% in 2021).

While concern about the cost of food and housing has increased, there has been no significant change in the likelihood of Europeans to select climate change or food sustainability as one of their top five most important issues

The proportion of respondents in EU countries surveyed in 2022 & 2023 who selected each of the following issues as being one of the top five most important issues to them personally

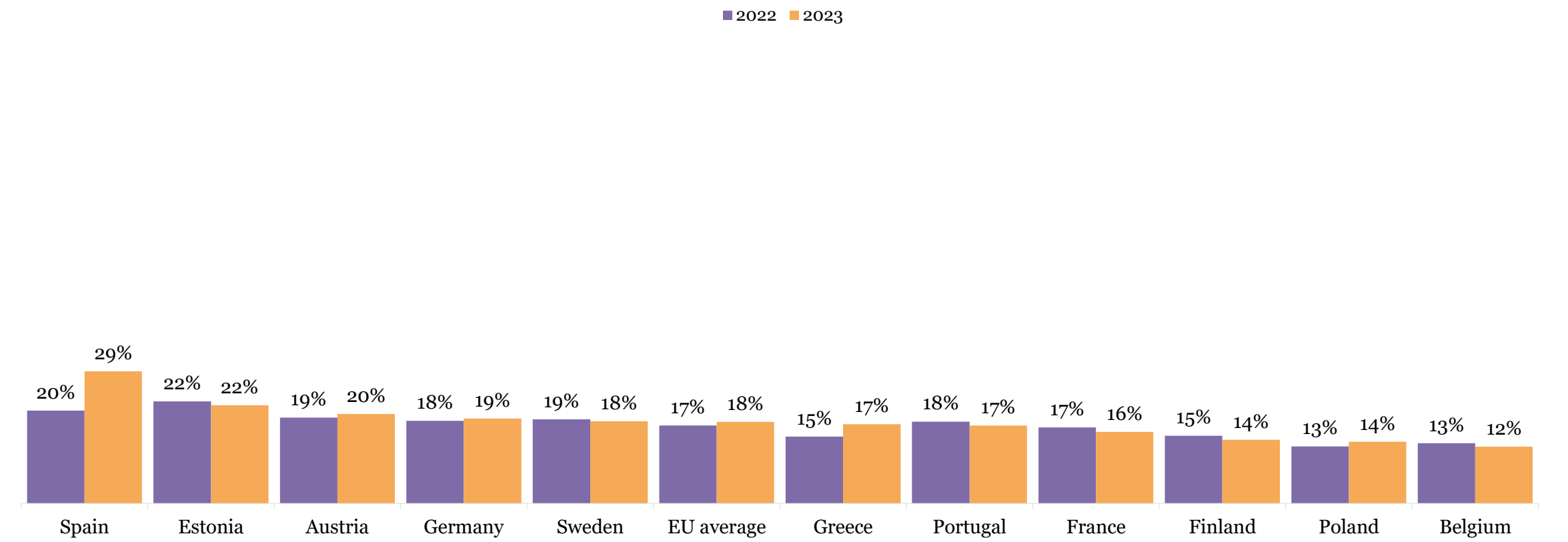


Q18. Which of the following do you see as the top five most important issues for you personally?

26 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland: 2022 (n=15261), 2023 (n=15896).

Spaniards were more likely to select food sustainability as one of their top five most important issues in 2023 than in 2022

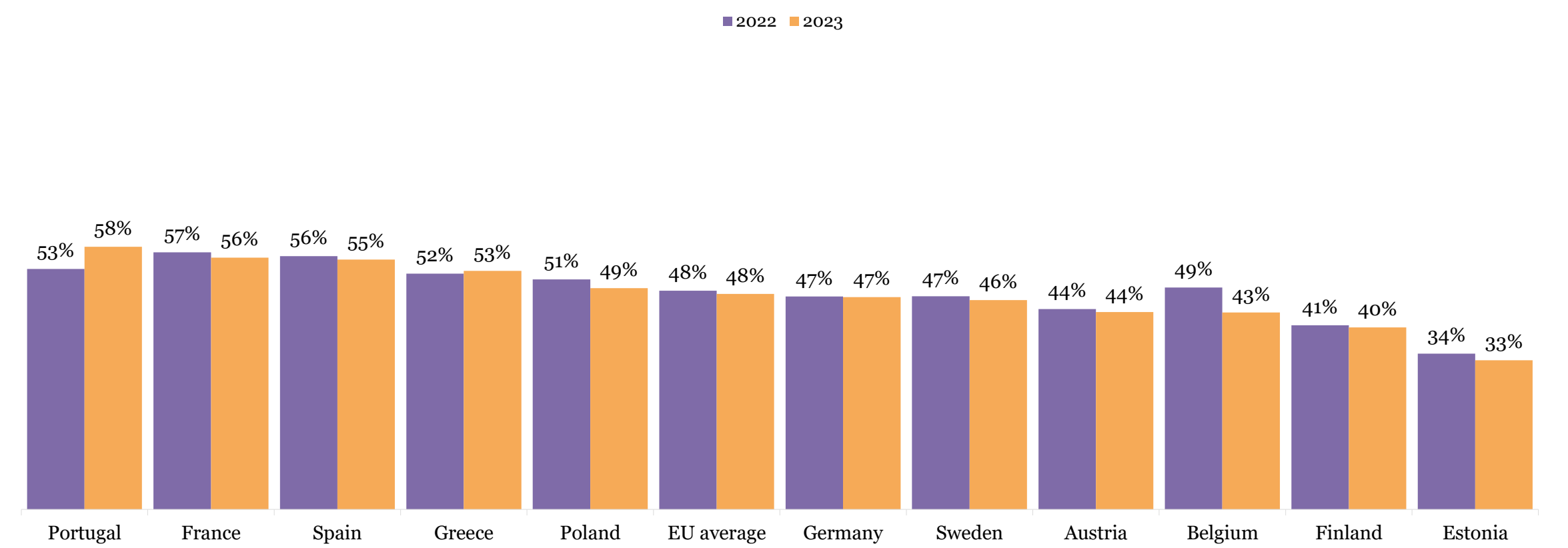
The proportion of respondents in each country who selected food sustainability as one of the top five most important issues to them personally in 2022 and 2023



Q18. Whether your food is sustainable: Which of the following do you see as the top five most important issues for you personally?

The proportion of Portuguese selecting climate change as one of the top five most important issues to them personally has increased

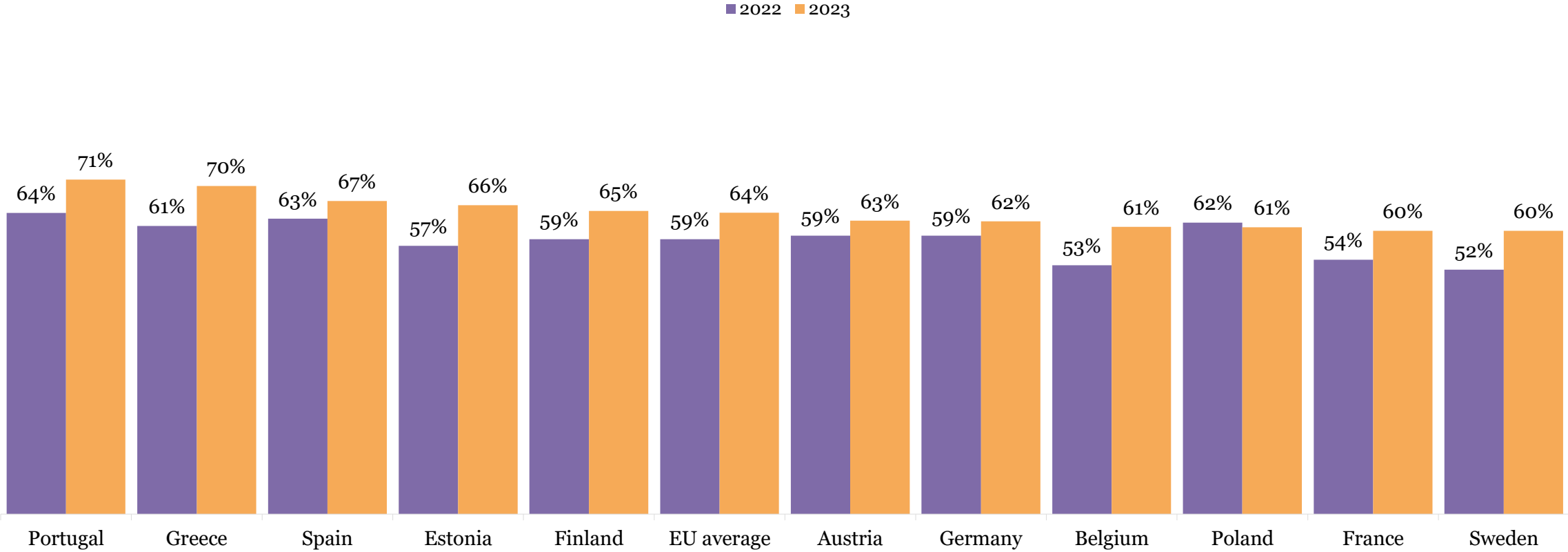
The proportion of respondents in each country who selected climate change as one of the top five most important issues to them personally, in 2022 and 2023



Q18. Climate change: Which of the following do you see as the top five most important issues for you personally?

Almost all Europeans were more likely to select the cost of food as one of the top five most important issues to them personally

The proportion of respondents in each country who selected cost of food as one of the top five most important issues to them personally

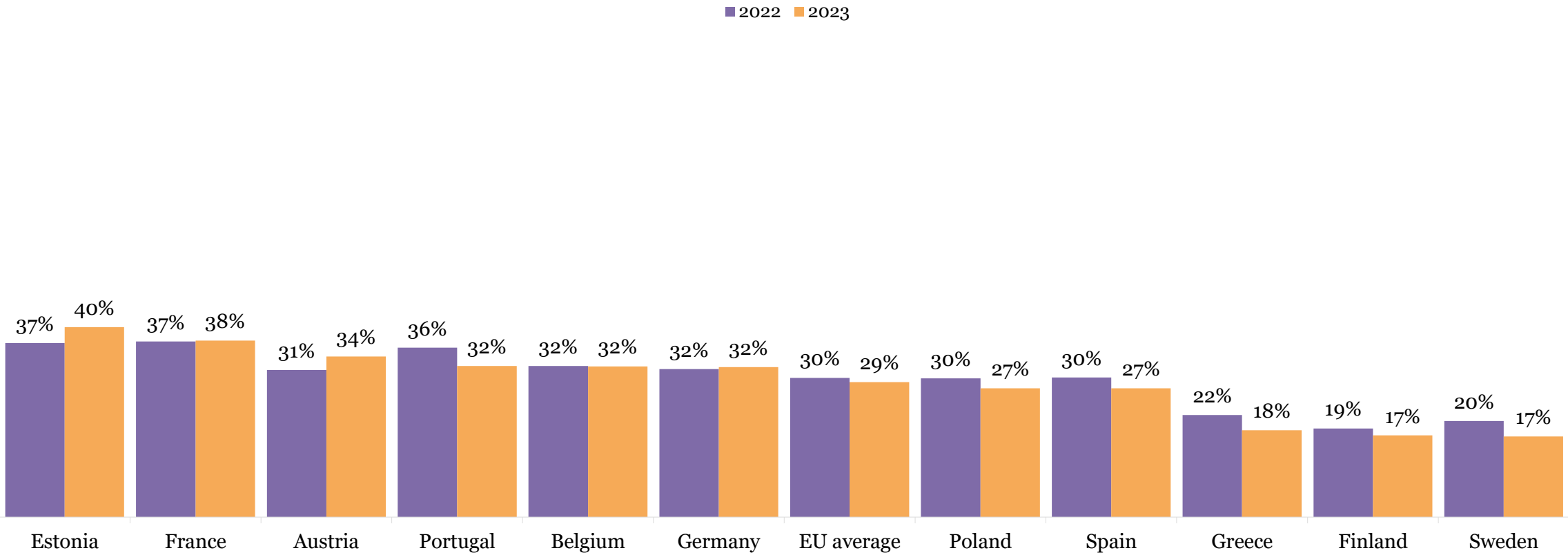


Q18. Cost of food: Which of the following do you see as the top five most important issues for you personally?

29 Base: Those aged 18-65 who live in Austria (2022, n=1004; 2023, n=1091), Belgium (2022, n=1000; 2023, n=1019), Estonia (2022, n=1013; 2023, n=1085), Finland (2022, n=1007; 2023, n=1081), France (2022, n=2017; 2023, n=2019), Greece (2022, n=1048; 2023, n=1113), Portugal (2022, n=1097; 2023, n=1101), Sweden (2022, n= 1014; 2023, n=1090), Germany (2022, n=2044; 2023, n=2067), Spain (2022, n=2009; 2023, n=2110) or Poland (2022,

Regarding other environmental issues, deforestation remains of particular concern to Estonians and the French

The proportion of respondents in each country who selected deforestation as one of the top five most important issues to them personally in 2022 and 2023

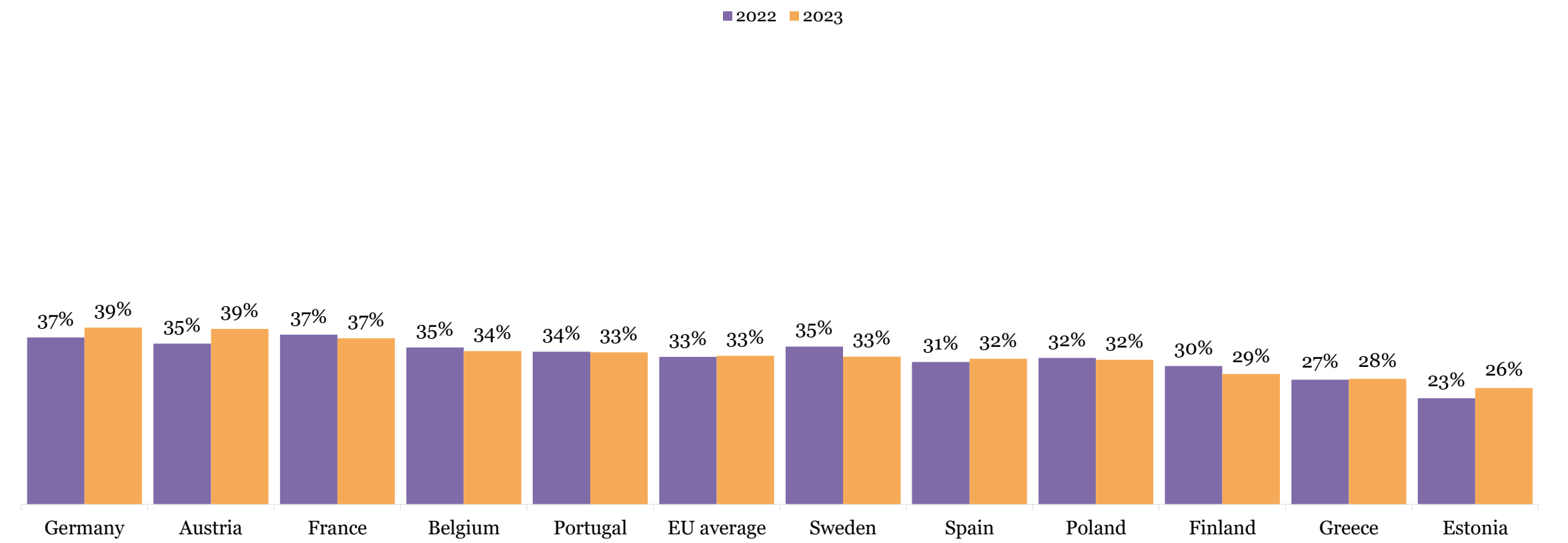


Q18. Deforestation: Which of the following do you see as the top five most important issues for you personally?

³⁰ Base: Those aged 18-65 who live in Austria (2022, n=1004; 2023, n=1091), Belgium (2022, n=1000; 2023, n=1019), Estonia (2022, n=1013; 2023, n=1085), Finland (2022, n=1007; 2023, n=1081), France (2022, n=2017; 2023, n=2019), Greece (2022, n=1048; 2023, n=1113), Portugal (2022, n=1097; 2023, n=1101), Sweden (2022, n= 1014; 2023, n=1090), Germany (2022, n=2044; 2023, n=2067), Spain (2022, n=2009; 2023, n=2110) or Poland (2022,

Germans and Austrians are most likely to have picked animals going extinct as one of their top five most important issues

The proportion of respondents in each country who selected animals going extinct as one of the top five most important issues to them personally in 2022 and 2023

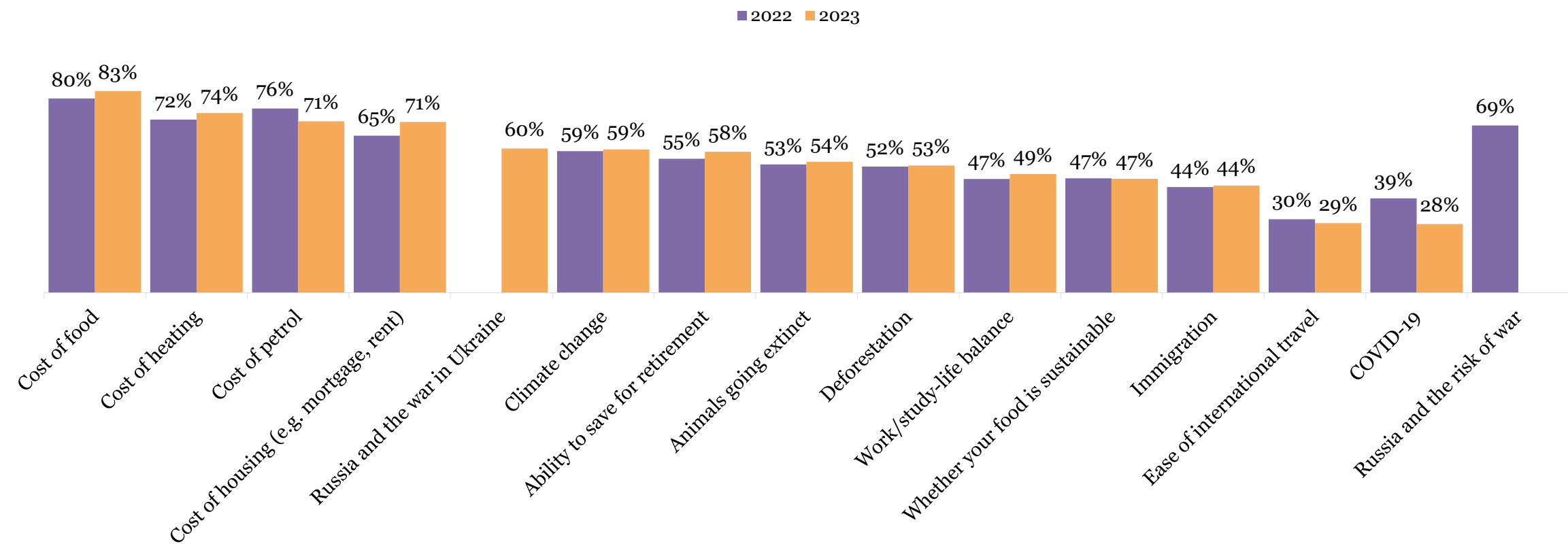


Q18. Animals going extinct: Which of the following do you see as the top five most important issues for you personally?

31 Base: Those aged 18-65 who live in Austria (2022, n=1004; 2023, n=1091), Belgium (2022, n=1000; 2023, n=1019), Estonia (2022, n=1013; 2023, n=1085), Finland (2022, n=1007; 2023, n=1081), France (2022, n=2017; 2023, n=2019), Greece (2022, n=1048; 2023, n=1113), Portugal (2022, n=1097; 2023, n=1101), Sweden (2022, n= 1014; 2023, n=1090), Germany (2022, n=2044; 2023, n=2067), Spain (2022, n=2009; 2023, n=2110) or Poland (2022,

Almost half of European respondents said food sustainability became more important to them over the last 12 months, the same proportion as in 2022

The proportion of EU respondents for whom the importance of the following issues has grown over the last 12 months

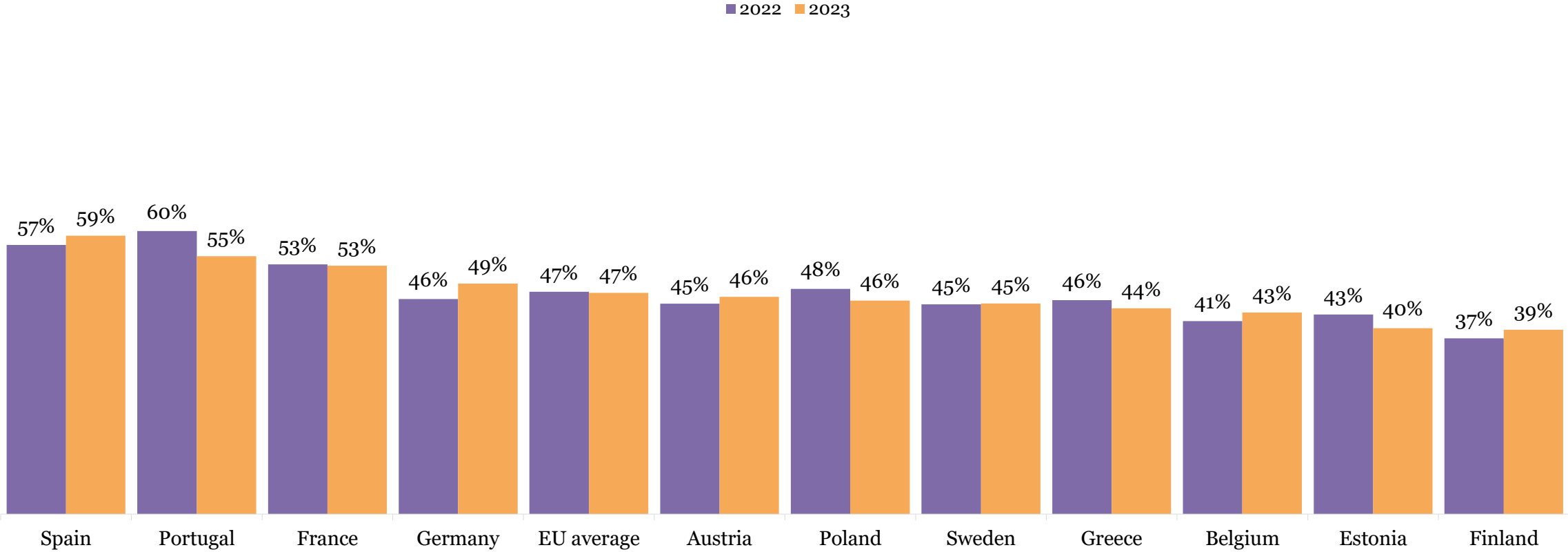


Q19. Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

32 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland: 2022 (n=15261), 2023 (n=15896).

Germans in 2023 are more likely to say that food sustainability has become more important to them over the last 12 months, than they were in 2022

The proportion of respondents in each country for whom the importance of food sustainability has grown over the last 12 months

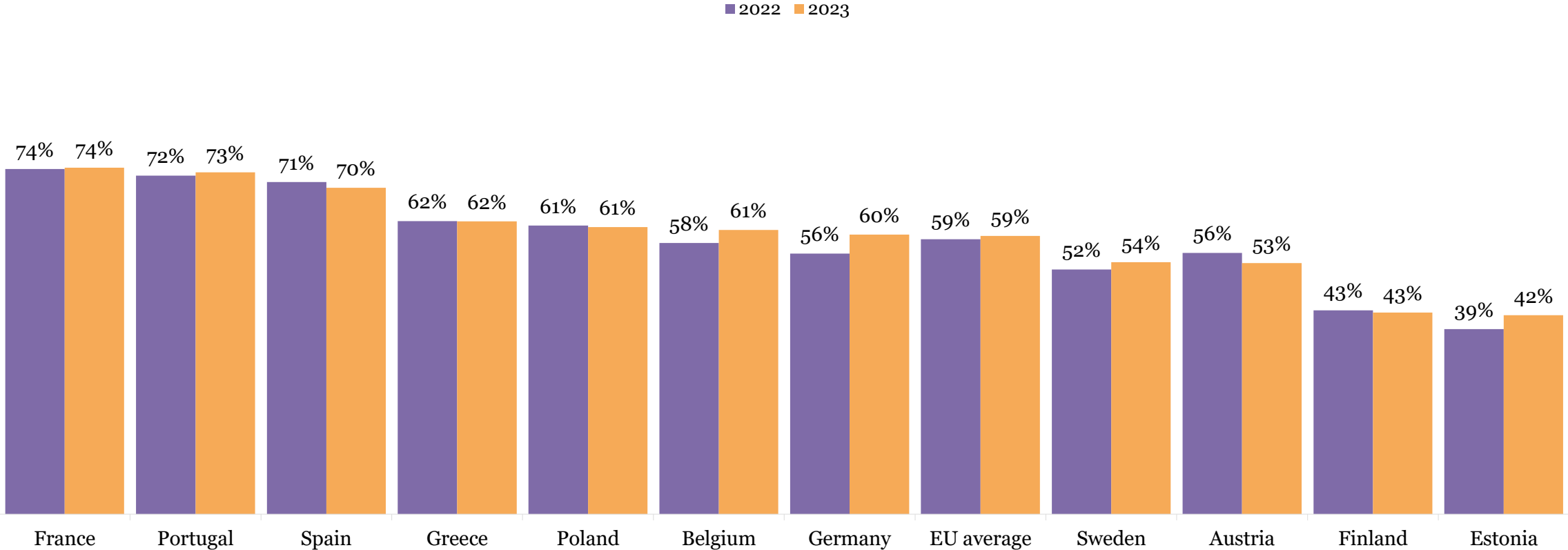


Q19. Whether your food is sustainable: Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

33 Base: Those aged 18-65 who live in Austria (2022, n=1004; 2023, n=1091), Belgium (2022, n=1000; 2023, n=1019), Estonia (2022, n=1013; 2023, n=1085), Finland (2022, n=1007; 2023, n=1081), France (2022, n=2017; 2023, n=2019), Greece (2022, n=1048; 2023, n=1113), Portugal (2022, n=1097; 2023, n=1101), Sweden (2022, n= 1014; 2023, n=1090), Germany (2022, n=2044; 2023, n=2067), Spain (2022, n=2009; 2023, n=2110) or Poland (2022,

Germans in 2023 are more likely to say that climate change has become more important to them over the last 12 months, than they were in 2022

The proportion of respondents in each country for whom the importance of climate change has grown over the last 12 months

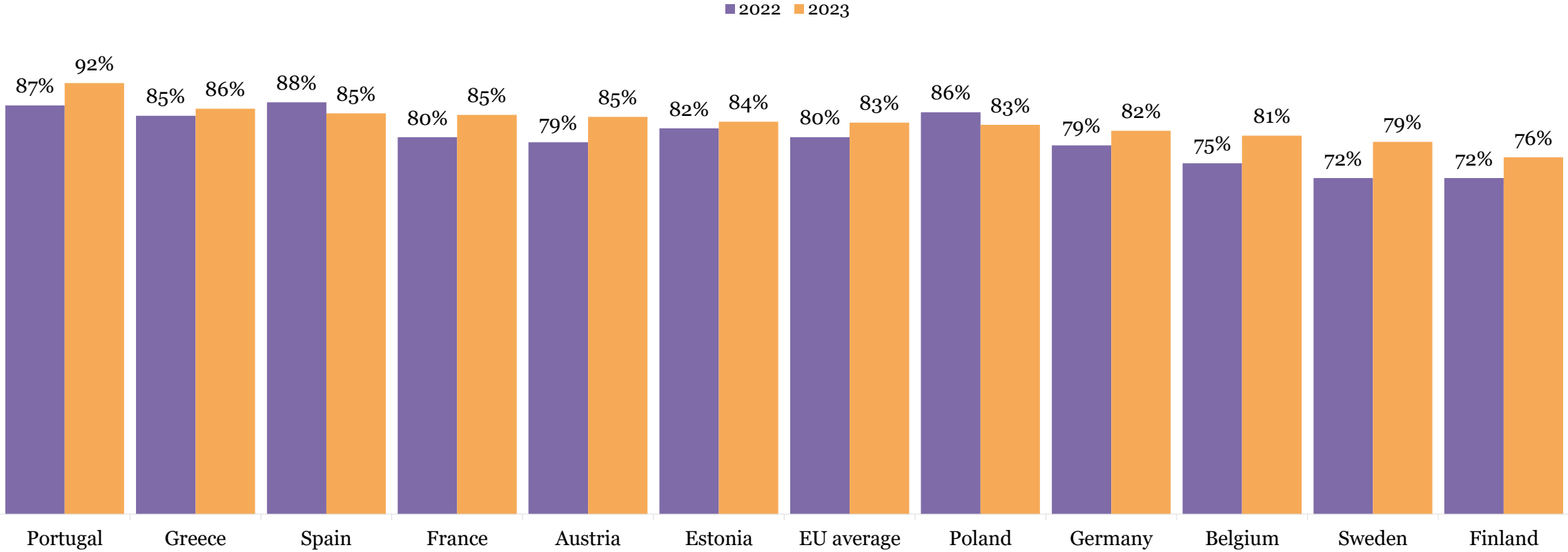


Q19. Climate change: Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

34 Base: Those aged 18-65 who live in Austria (2022, n=1004; 2023, n=1091), Belgium (2022, n=1000; 2023, n=1019), Estonia (2022, n=1013; 2023, n=1085), Finland (2022, n=1007; 2023, n=1081), France (2022, n=2017; 2023, n=2019), Greece (2022, n=1048; 2023, n=1113), Portugal (2022, n=1097; 2023, n=1101), Sweden (2022, n= 1014; 2023, n=1090), Germany (2022, n=2044; 2023, n=2067), Spain (2022, n=2009; 2023, n=2110) or Poland (2022,

In seven out of 11 EU countries, there is a statistically significant increase from 2022 to 2023 in people who see cost of food as having become a more important to them over the last 12 months. In Spain and Poland however, fewer people in 2023 see cost of food as having become a more important issue to them in the last 12 months than did in 2022

The proportion of respondents in each country for whom the importance of the cost of food has grown over the last 12 months

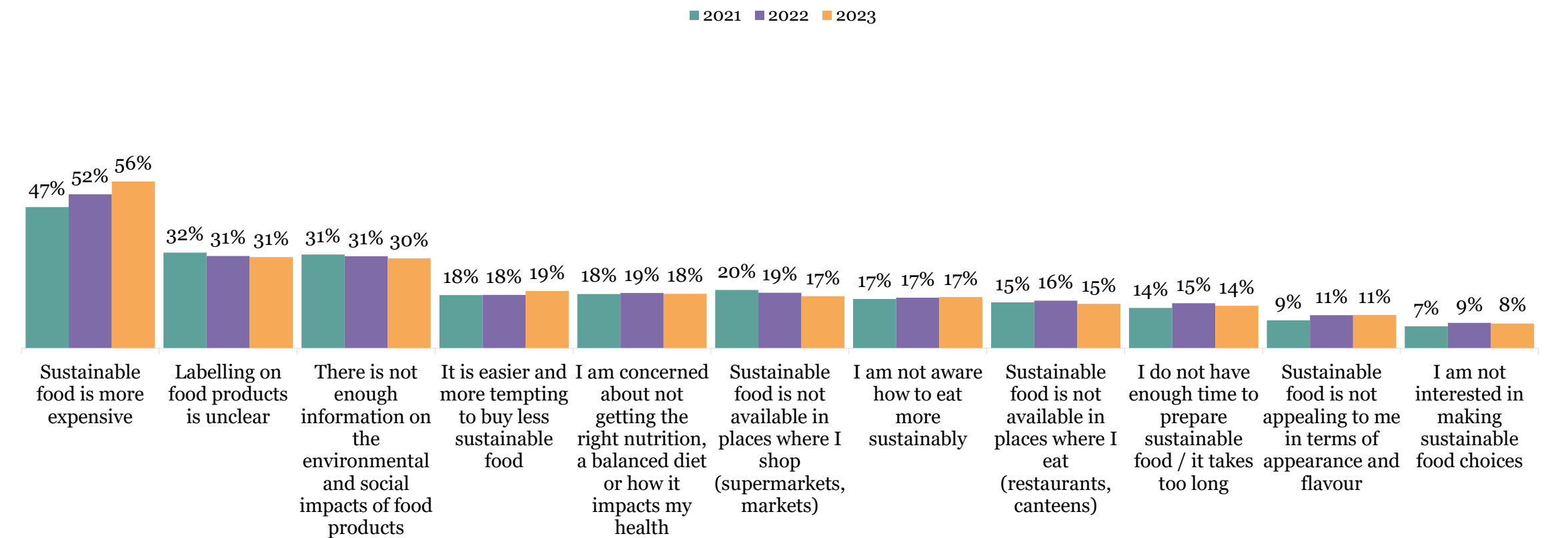


Q19. Cost of food. Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

35 Base: Those aged 18-65 who live in Austria (2022, n=1004; 2023, n=1091), Belgium (2022, n=1000; 2023, n=1019), Estonia (2022, n=1013; 2023, n=1085), Finland (2022, n=1007; 2023, n=1081), France (2022, n=2017; 2023, n=2019), Greece (2022, n=1048; 2023, n=1113), Portugal (2022, n=1097; 2023, n=1101), Sweden (2022, n=1014; 2023, n=1090), Germany (2022, n=2044; 2023, n=2067), Spain (2022, n=2009; 2023, n=2110) or Poland (2022,

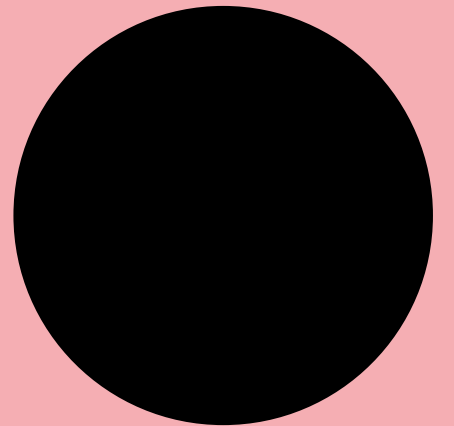
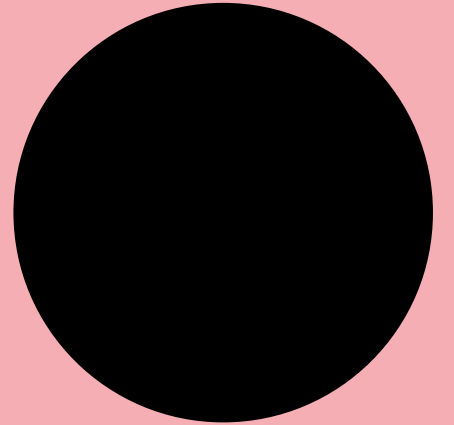
Since 2021 an increasing proportion of EU respondents identify the cost of sustainable food as a barrier to them eating it

The proportion of respondents in EU countries surveyed in 2021-2023 who selected each of the following factors as something that prevents or stops them from eating types of food that are better for the environment and more sustainable



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?

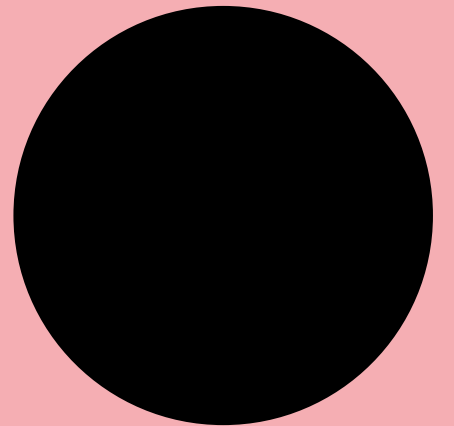
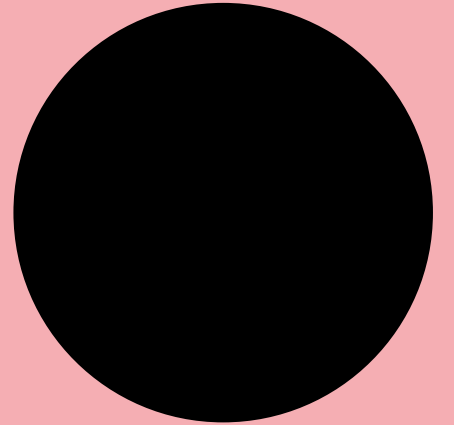
Section Three: Policy Reflections



Reflections

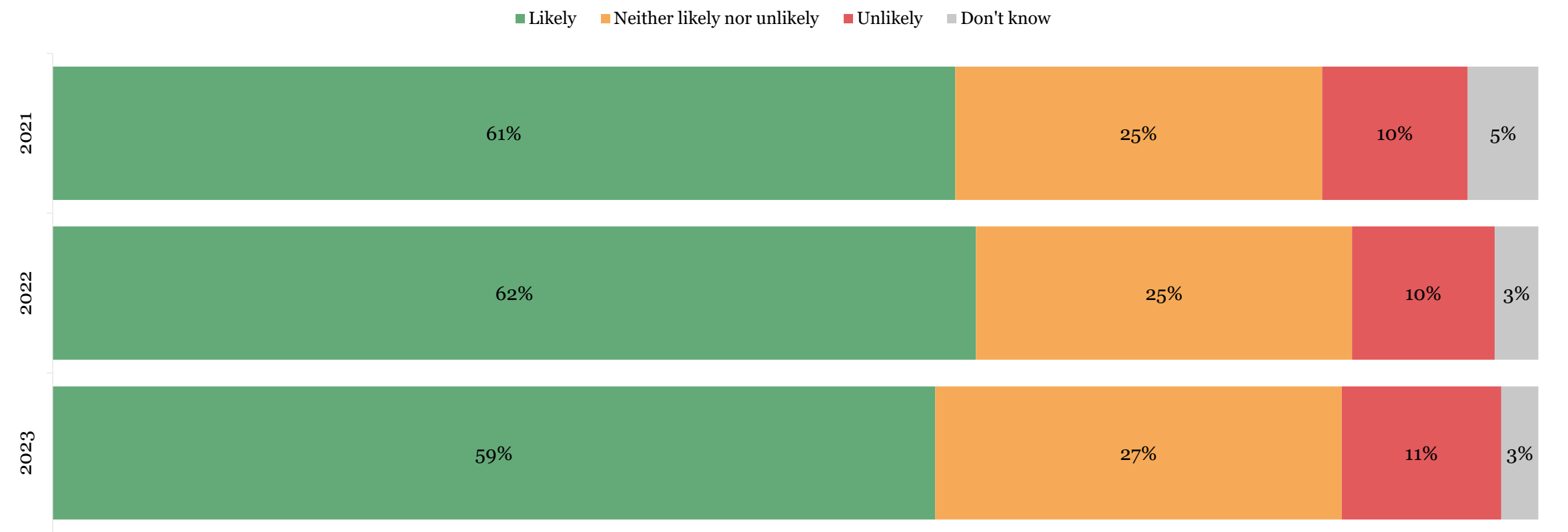
- Europeans are more ambitious than not when it comes to believing that food in public sector canteens should be sustainable. Just under half of EU respondents (47%) say that more than half of the food public canteens serve should be sustainable, while only one in six (14%) prefer than less than half of food served be sustainable. As such reforms promoting canteen sustainability have the opportunity to drive significant change, without endangering public support.
- In 2022, we found that Europeans saw businesses that produce or manufacture food as having the second highest responsibility to lead on sustainability. In 2023, we confirm that among food selling-organisations, EU respondents are most likely to select large manufacturing businesses as having full/a lot of responsibility for ensuring product sustainability. What's more seven in ten (69%) said that manufacturing businesses must source a lot more ingredients from sustainable food producers. Campaigns targeting manufacturing businesses may therefore be more likely to receive public support than those targeting retailers.
- Efforts to restrict the advertising of unsustainable food by businesses are likely to receive more public support in France and Spain than they will in Finland, Sweden or Estonia.
- Since 2021 the proportion of Europeans selecting the cost of sustainable food as a barrier to eating it has increased by around a fifth, the implication being that it costs too much relative to unsustainable food, at a time when the cost of living crisis has constrained budgets. However, with over three quarters of Europeans saying that sustainable food should cost at least the same as unsustainable food, there may be a reservoir of public support for interventions that at least equalise the cost of these different food types.

Section Four: Public Interest in Sustainable Food in the EU



The proportion of respondents who report being likely to buy and eat sustainable food has fallen slightly in the countries tracked since 2021

How likely respondents in tracked countries were to buy and eat sustainable food in 2021-2023

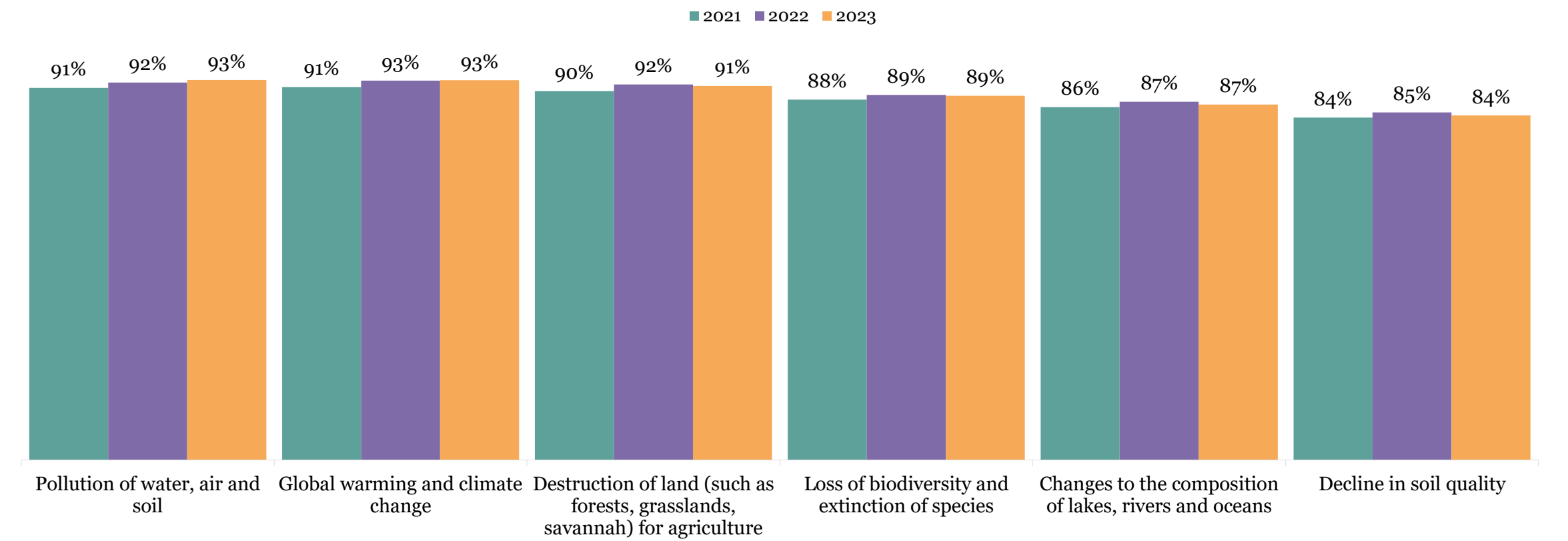


Q10. How likely or unlikely, if at all, are you to buy and eat food that is less damaging for the environment and is more sustainable?

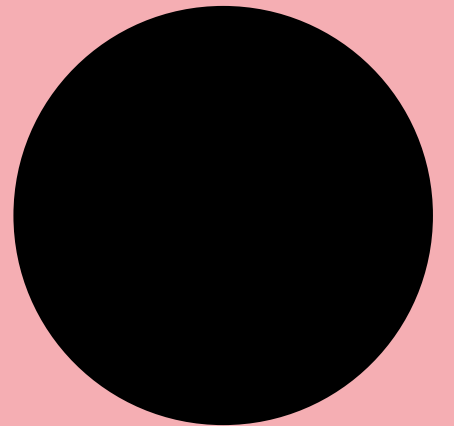
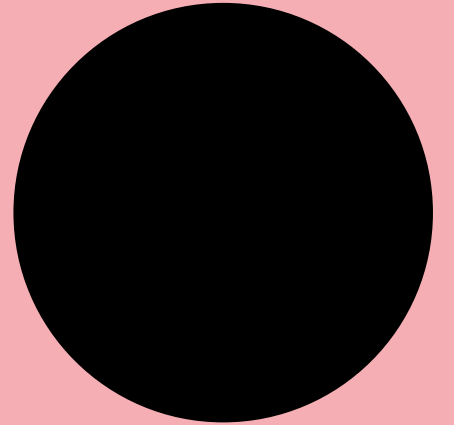
⁴⁰ Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK: 2021 (n=11439), 2022 (n=11215), 2023 (n=11634)

The proportion of respondents in countries tracked since 2021 who claim to know at least a little about the following environmental impacts of food has remained constant

The level of knowledge respondents in tracked countries had about each of the following environmental impacts of food in 2021-2023

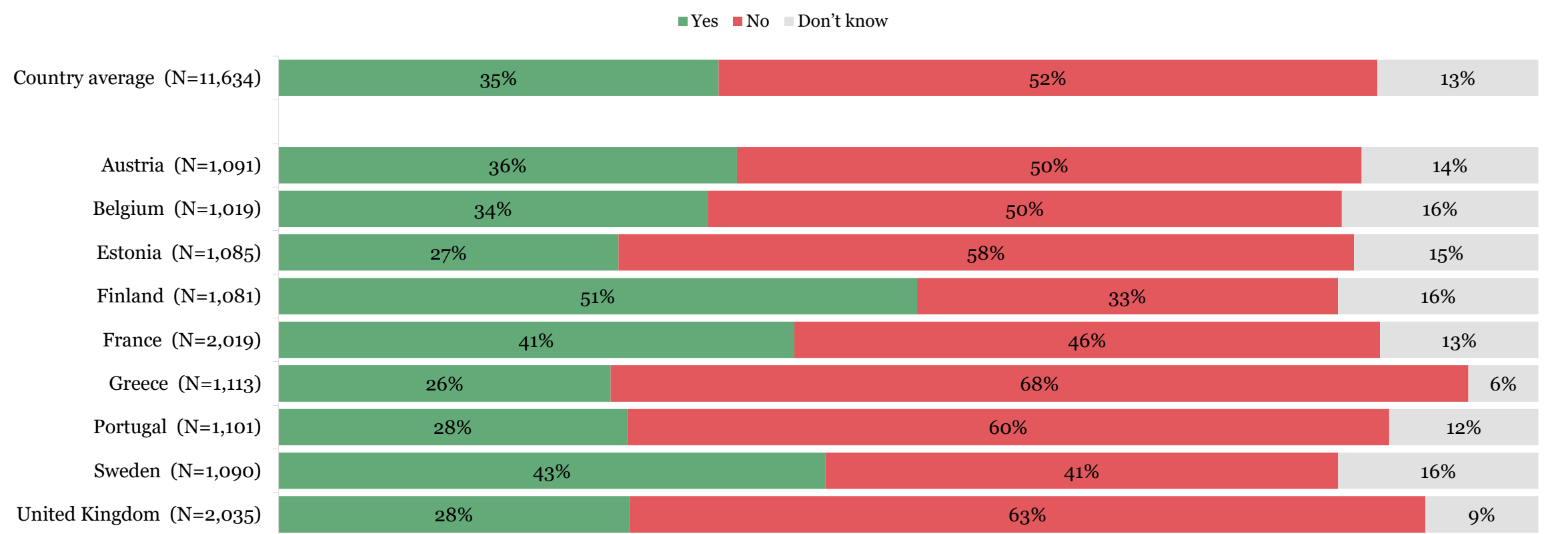


Section Five: The Impact of Eat4Change



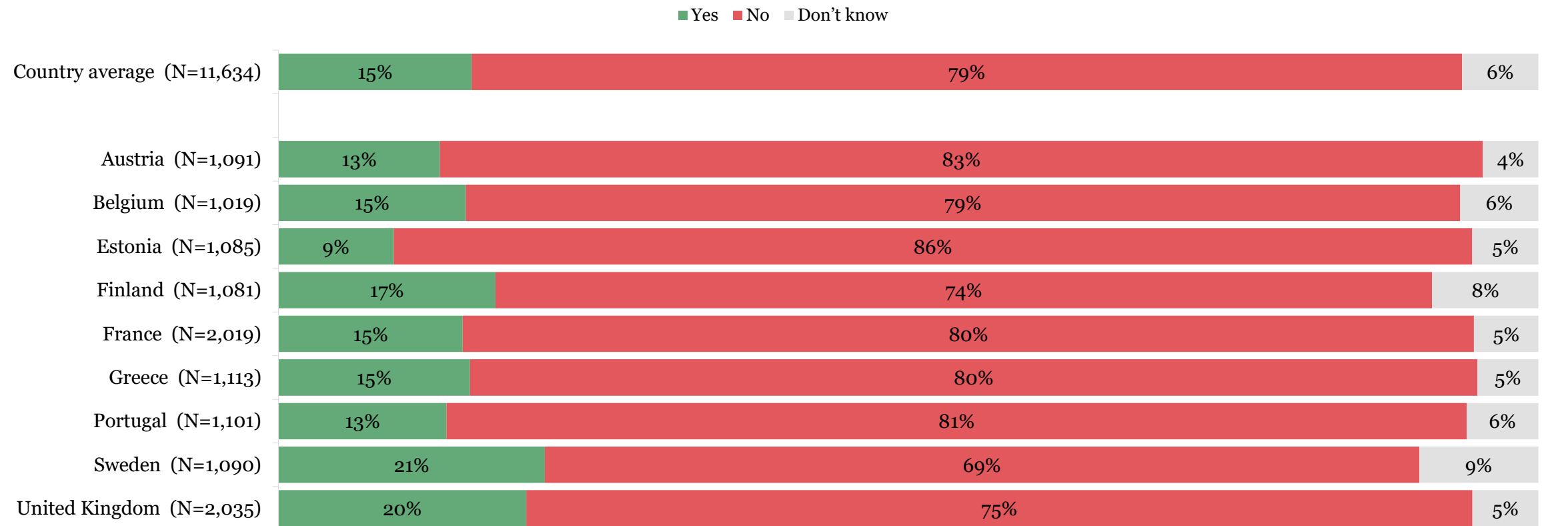
Just over a third of Eat4Change respondents recall seeing, hearing or reading messages in the last month encouraging them to eat sustainably; Finns were the most likely to recall encountering such messaging

The proportion of respondents in Eat4Change countries who recall, or do not recall, seeing, hearing or reading messages in the last month encouraging them to eat sustainably



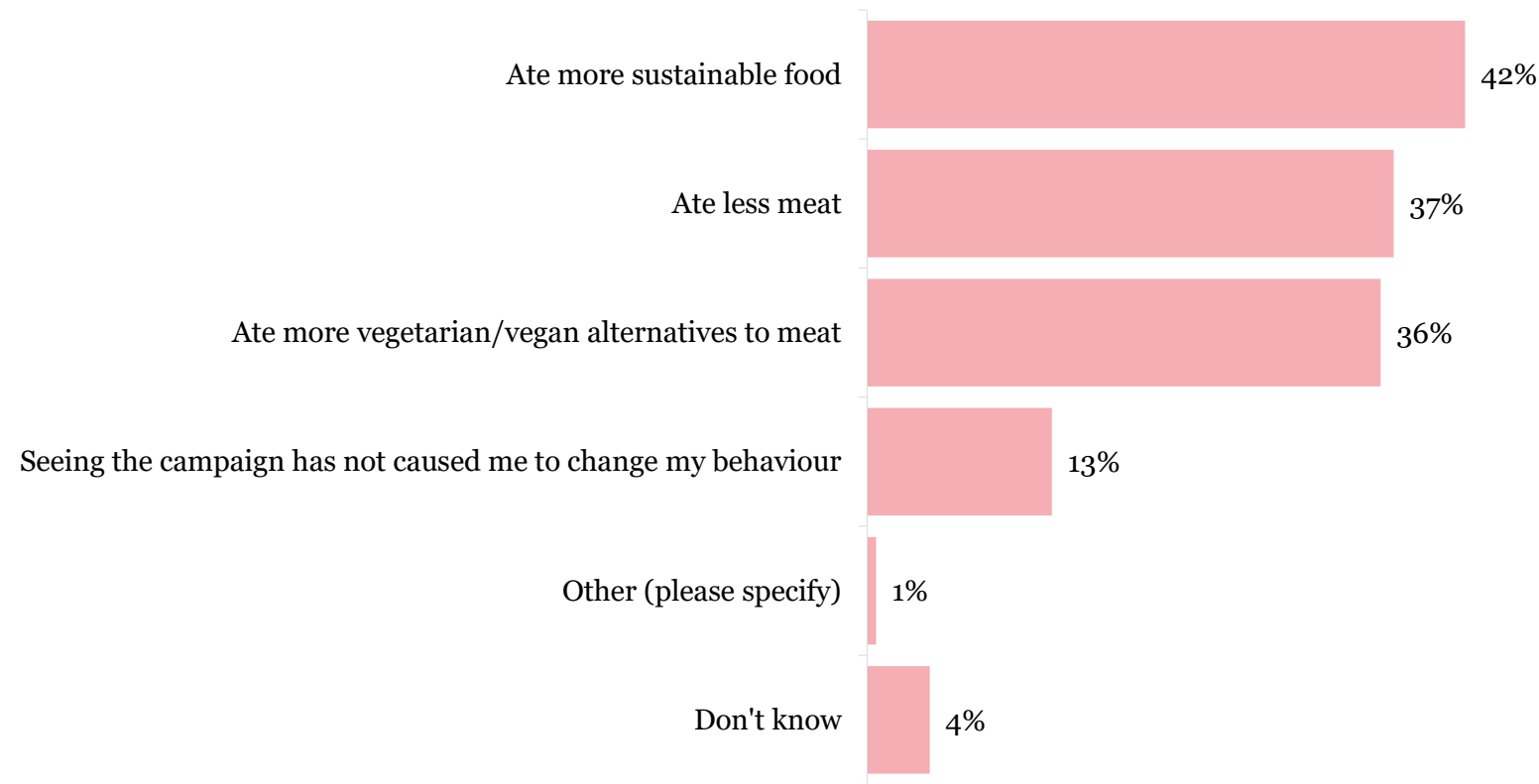
One in six Eat4Change respondents recall seeing images from the WWF/ELF Eat4Change campaign over the previous month

The proportion of respondents in Eat4Change countries who recall, or do not recall, seeing images from the WWF/ELF Eat4Change campaign in the last month



Four in ten Eat4Change respondents who recall having seen material from the campaign recently report eating more sustainable food as a result

Proportion of Eat4Change respondents who recall having seen material from the WWF/ELF Eat4Change campaign recently, who as a result changed their behaviour in the following ways

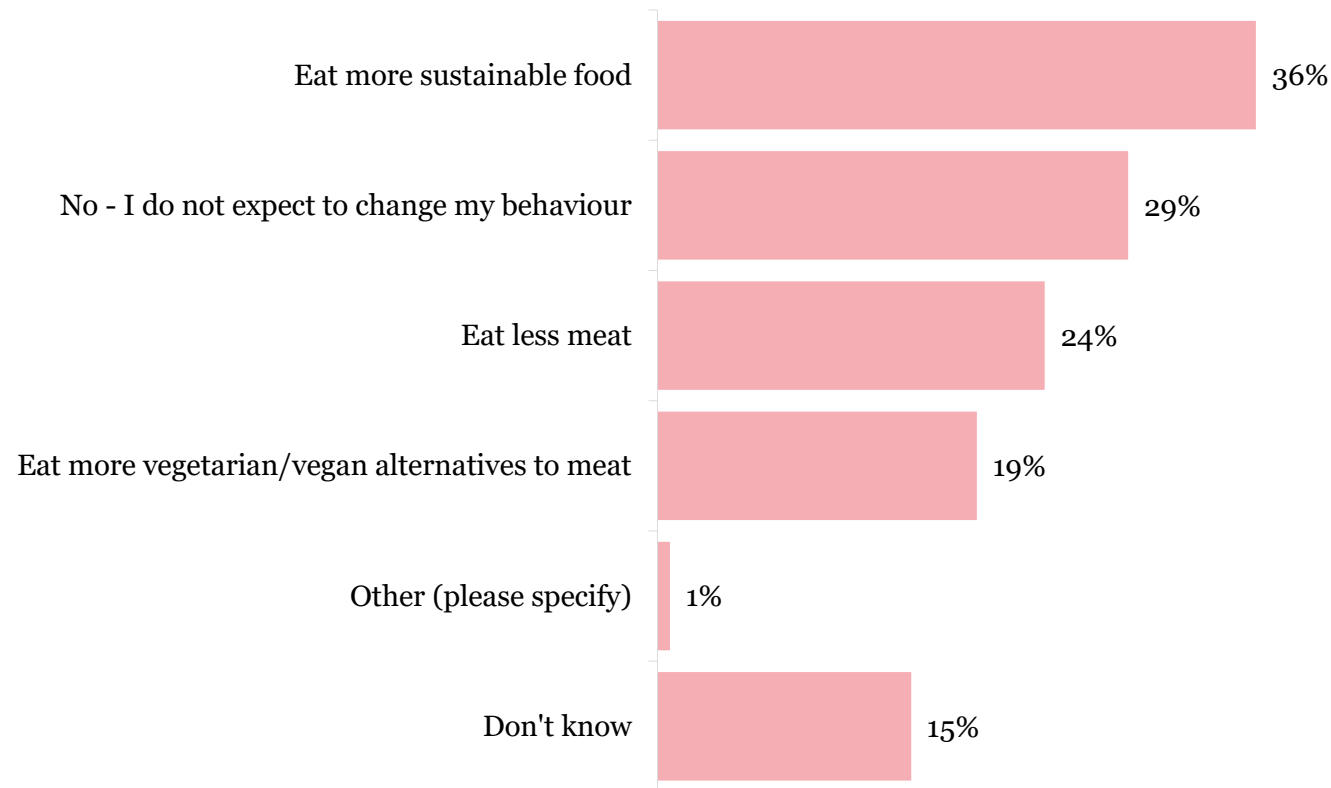


Q22W3. You said that you recall having seen material from the WWF/ELF Eat4Change campaign recently. Did you then change your behaviour in any of the following ways, as a result of seeing this material?

45 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK, and who recall having seen material from the WWF/ELF Eat4Change campaign recently (n=1830)

A third of Eat4Change respondents who do not recall having seen material from the WWF/ELF Eat4Change campaign recently, believe they might eat more sustainable food in future

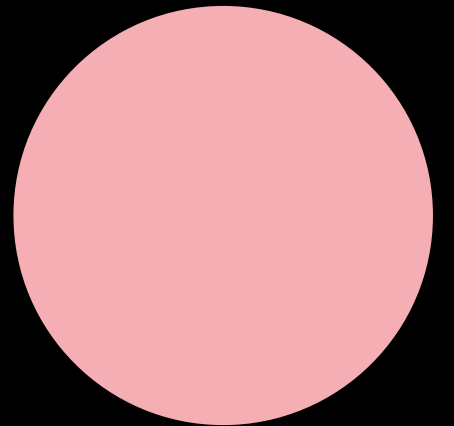
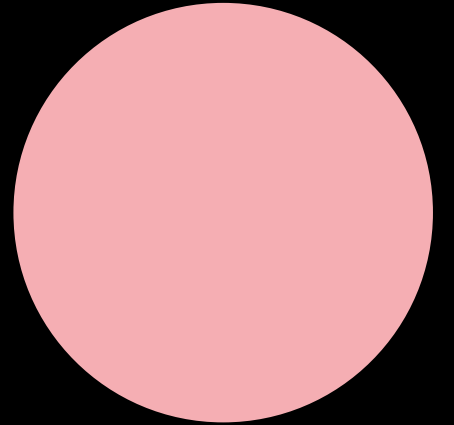
Proportion of Eat4Change respondents who do not recall having seen material from the WWF/ELF Eat4Change campaign recently, but who were shown it in the survey, who believe they might change their behaviour in the following ways



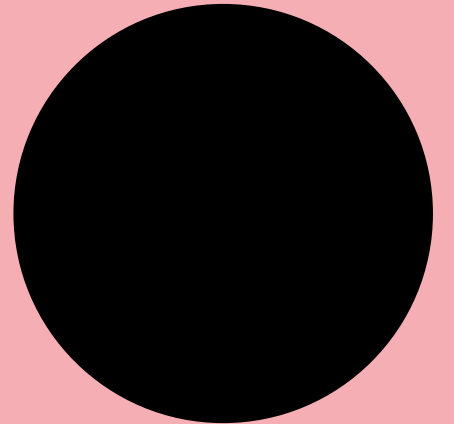
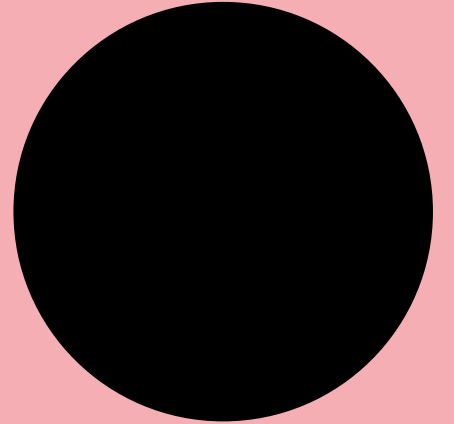
Q23W3. As a result of having now seen material from the WWF/ELF Eat4Change campaign do you think you might change your behaviour in any of the following ways?

46 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK, and who do not recall having seen material from the WWF/ELF Eat4Change campaign recently (n=9804)

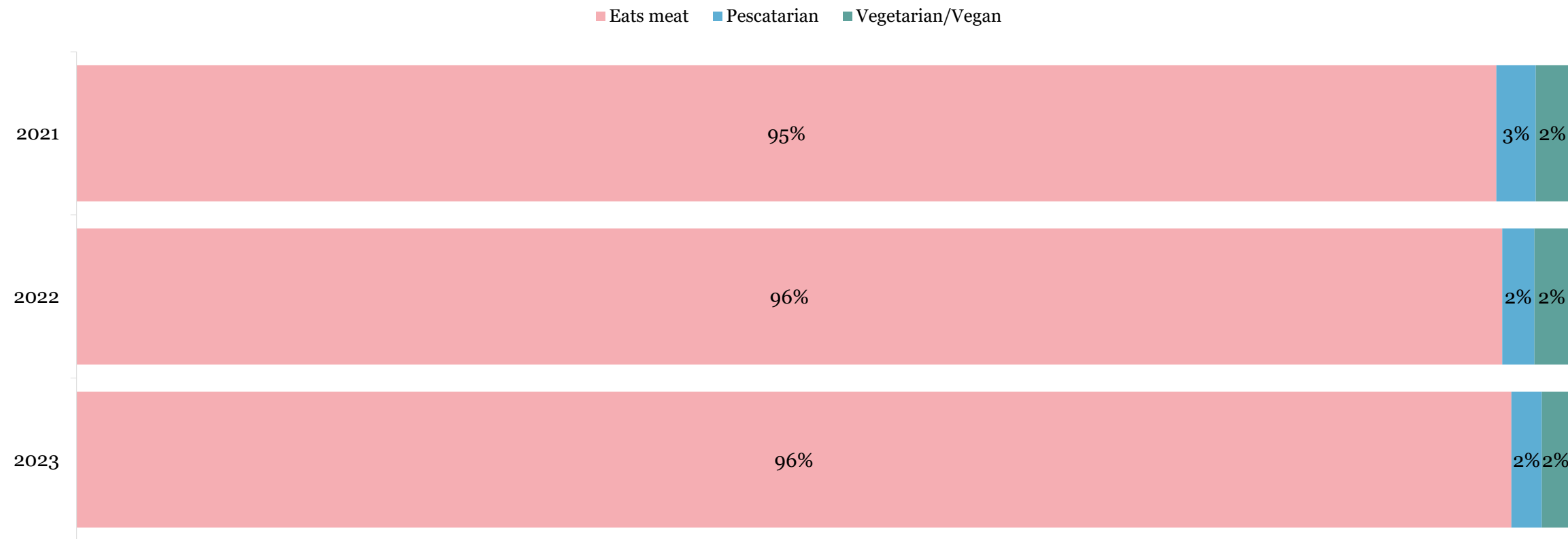
Appendix



Appendix One: Q1-Q9, no change over time

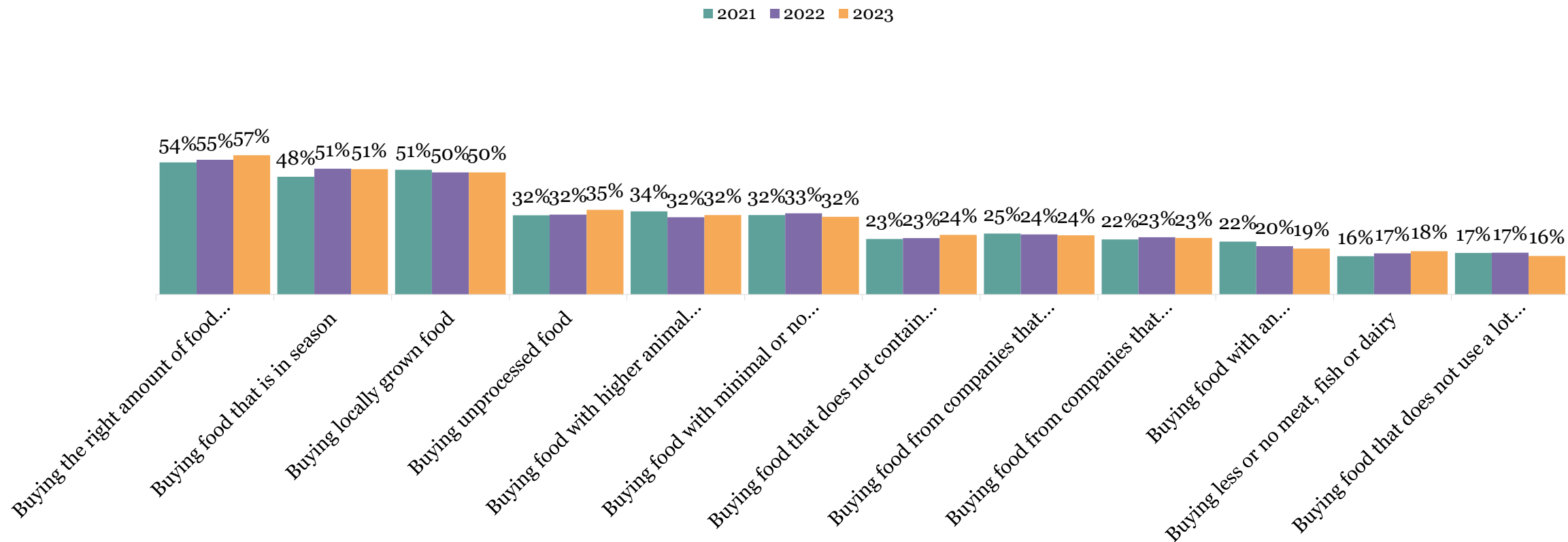


The proportion of respondents in countries tracked since 2021 who do and do not eat meat



Q1. Do you eat the following foods?

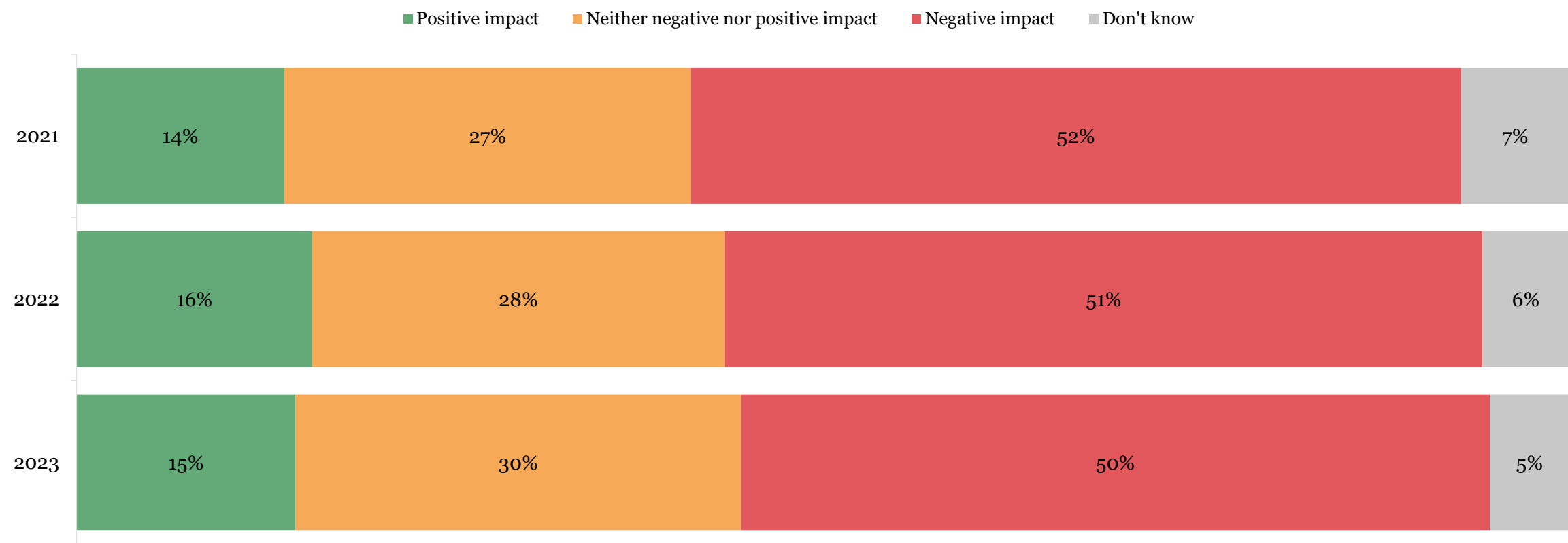
The proportion of respondents in countries tracked since 2021 for whom the following environmental and ethical considerations were among the five most important to them personally, when choosing what food to buy



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

⁵⁰ Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK: 2021 (n=11439), 2022 (n=11215), 2023 (n=11634)

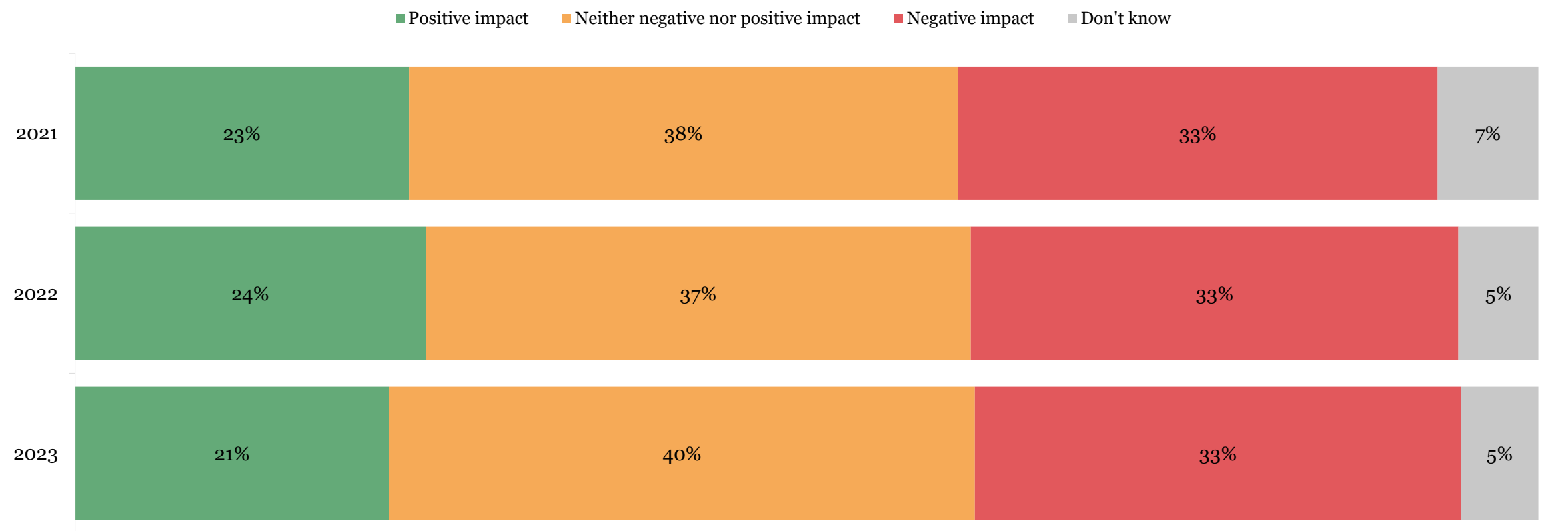
The perceived impact in countries tracked since 2021 of food produced and consumed by a group the respondent is part of (e.g. "the food we produce and consume") on the environment



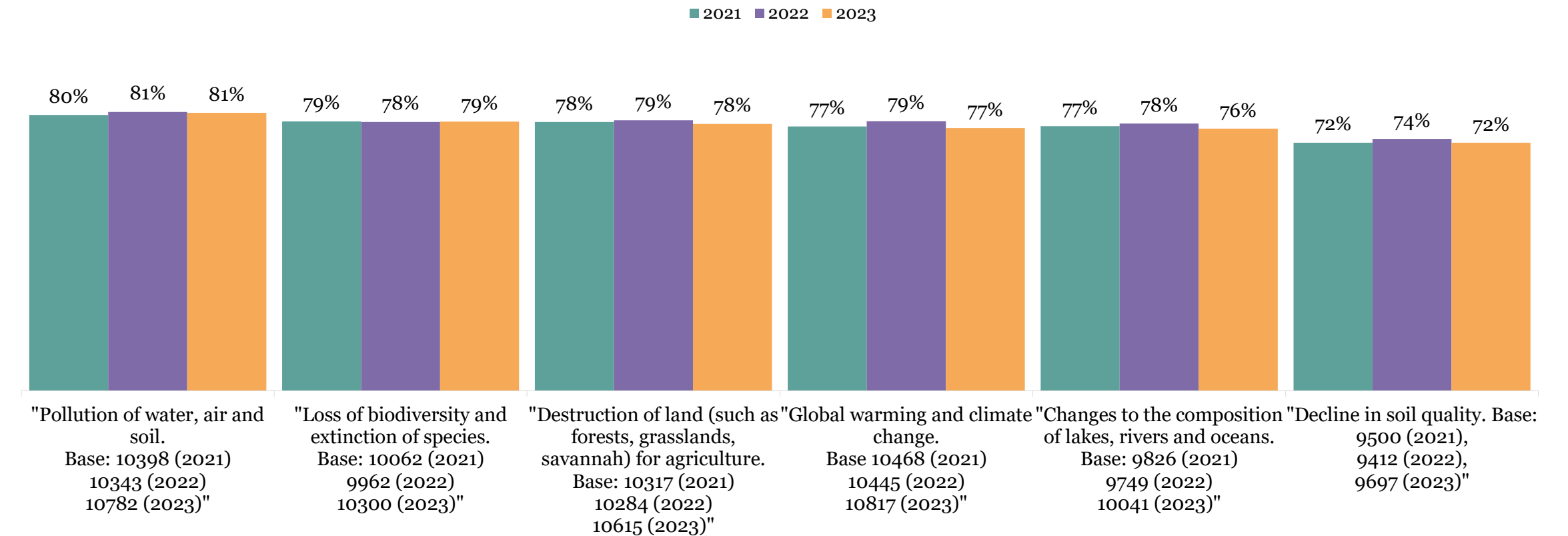
Q3. To what extent, if at all, do you think that the food we produce and consume has a positive or negative impact on the environment?

⁵¹ Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK: 2021 (n=11439), 2022 (n=11215), 2023 (n=11634)

The perceived impact in countries tracked since 2021 of food produced and consumed by the respondent alone on the environment

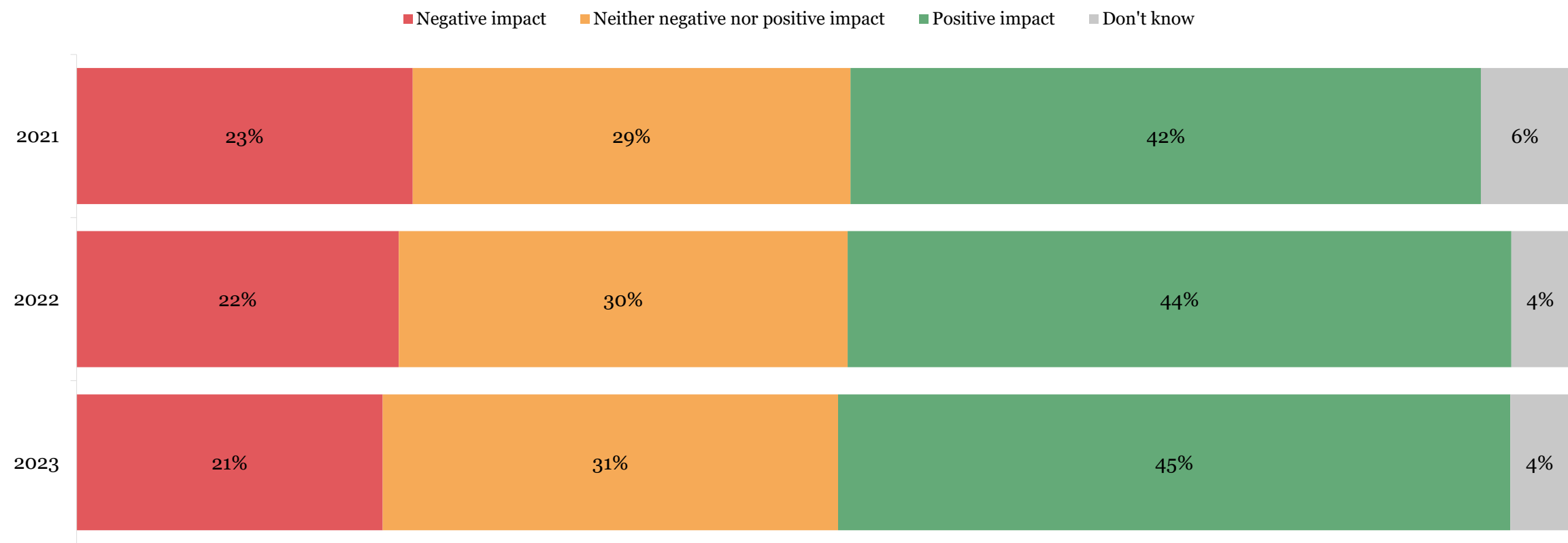


The proportion of respondents in countries tracked since 2021 who knew at least a little and were concerned about the following environmental impacts caused by the food they and their group ("we") produce and consume on a large scale



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?

Perceived environmental impact of food produced within the countries tracked since 2021, over time



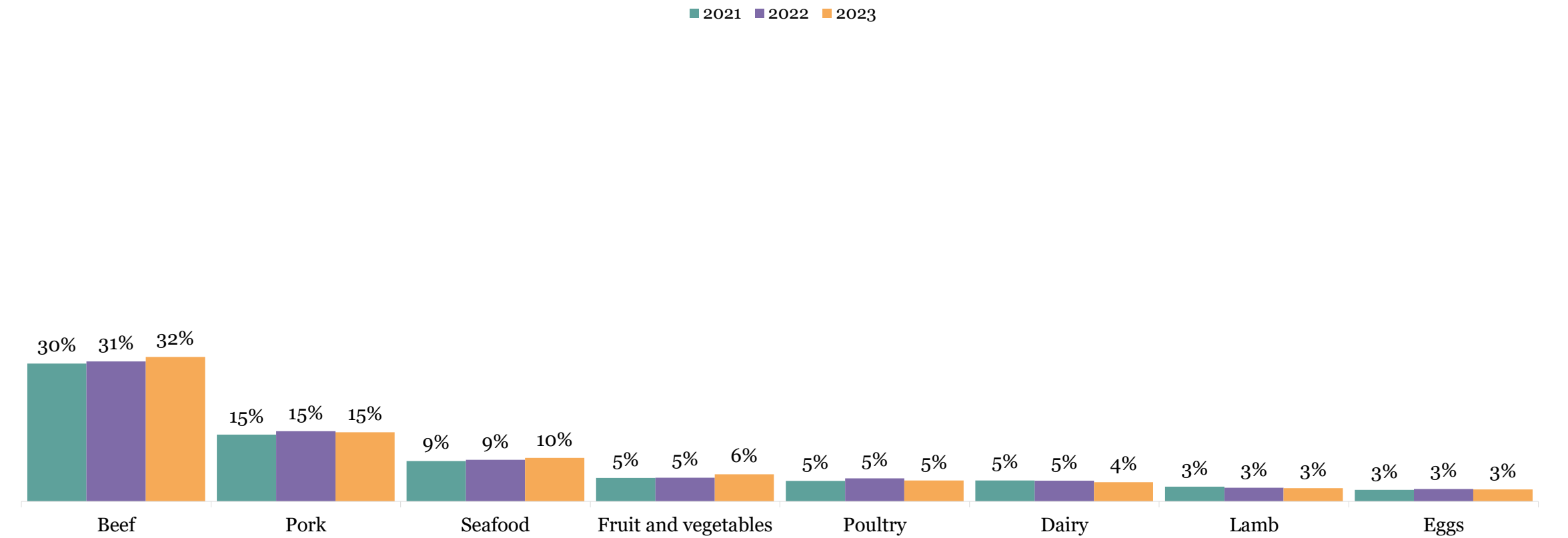
Perceived environmental impact of food produced outside of the countries tracked since 2021, over time



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?

55 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK: 2021 (n=11439), 2022 (n=11215), 2023 (n=11634)

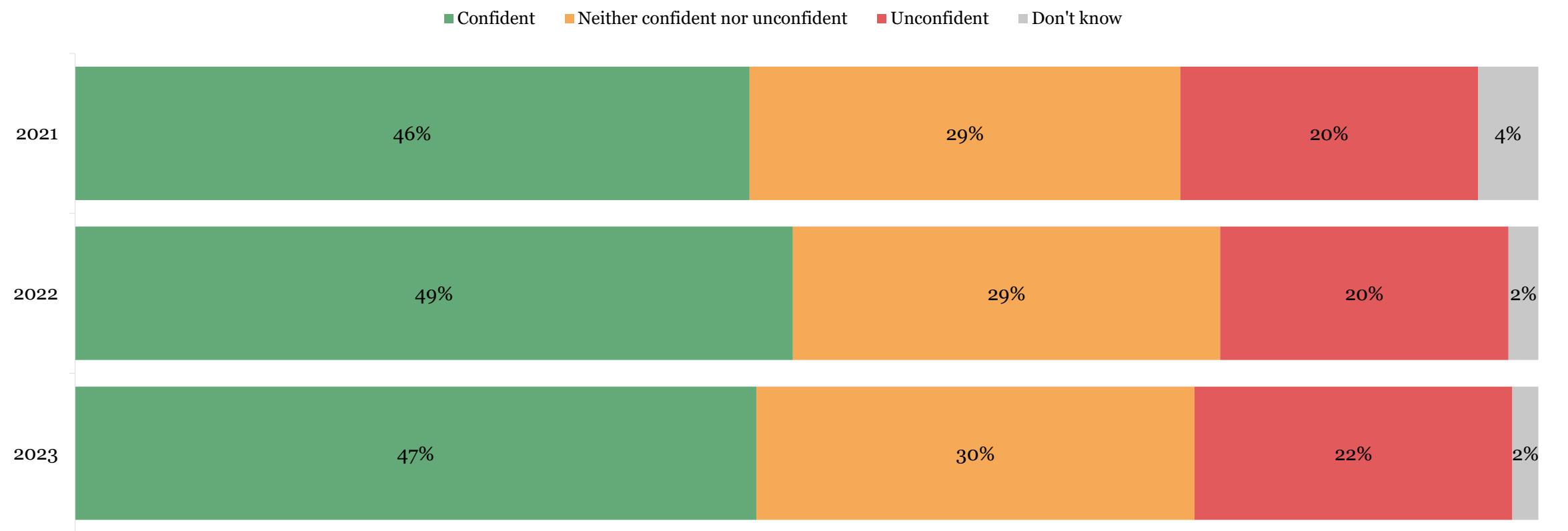
The proportion of respondents in countries tracked since 2021 who selected each of the following foods as having the biggest negative impact on the environment



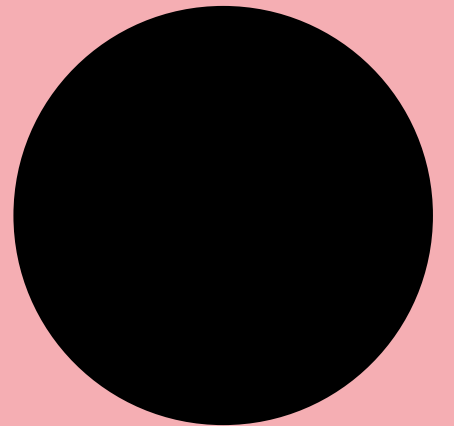
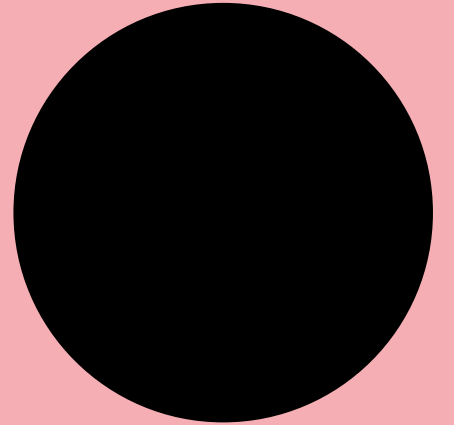
Q8. Which of the following do you think has the biggest negative impact on the environment, if any?

56 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK: 2021 (n=11439), 2022 (n=11215), 2023 (n=11634)

The proportion of respondents in countries tracked since 2021 who were confident/unconfident in their knowledge of how to buy and eat more environmentally friendly and sustainable food



Appendix Two: EU Country Summaries



EU Country Headlines (1)

- Austrians are **more** likely than average* to say food retail businesses must take action and responsibility for ensuring the food they serve is sustainable
- Belgians are **less** likely than average* to say public canteens must take action and responsibility for ensuring the food they serve is sustainable
- Estonians are **less** likely than average* to say businesses must take action to improve product sustainability, particularly manufacturing businesses
- Finns are **more** likely than average* to support cheaper sustainable food, and to believe that public canteens are especially responsible for providing it. However, they are **less** likely than average* to say businesses must take action to improve product sustainability, particularly retail businesses
- The French are **more** likely than average* to see climate change as an important issue, and to say that businesses should stop advertising unsustainable products
- Greeks are **more** likely than average* to say manufacturing businesses must take responsibility and action to ensure the sustainability of their products
- The Portuguese are **more** likely than average* to say public canteens and businesses must take responsibility and action to ensure the sustainability of their products, though they expect more of large than SME retailers.

** All country average, 2023 (includes both the UK and EU countries)*

EU Country Headlines (2)

- Swedes are **more** likely than average* to see SME businesses as responsible for product sustainability
- Germans are **more** likely than average* to see animal extinction as an important issue, and to be willing to see unsustainable food become more expensive to deter consumers from buying it.
- Spaniards are **more** likely than average* to say public canteens and businesses must take action to ensure the sustainability of their products, to expect the most of large food manufacturers, and to see the issue of food sustainability as important.
- Poles are **less** likely than average* to see large businesses as responsible for ensuring the sustainability of their products.

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Austria key standouts

Austrians are more likely than average* to say food retail businesses must take action and responsibility for ensuring the food they serve is sustainable

- Austrians are more likely than average to say that **more than half** of the food served in public canteens in EU should be sustainably produced (**51%** vs. 46%)
- Austrians are more likely than average to say that small and medium-sized food retailers have **full/a lot of responsibility** for ensuring that the food they sell is sustainable (**48%** vs. 45%)
- Furthermore, Austrians are more likely than average to **believe** that all food retail businesses must:
 - Source a lot more food from sustainable food producers (**73%** vs. 68%)
 - Source a lot less meat, dairy and eggs from unsustainable food producers (**58%** vs. 52%)
- Austrians are more likely than average to say that sustainable food should cost **more** than unsustainable food in future (**26%** vs. 20%)
- Austrians are more likely than average to say that the issue of immigration has become **more important** to them over the last 12 months (**50%** vs. 44%). Austrians are also more likely than average to say that COVID-19 (**54%** vs 42%) and Russia (**20%** vs. 14%) have become **less important** to them over the last 12 months.

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Belgium key standouts

Belgians are less likely than average* to say public canteens must take action and responsibility for ensuring the food they serve is sustainable

- Belgians are more likely than average to say that the food they eat has a **negative** impact on the environment (**38%** vs. 32%)
- Belgians are more likely than average to **lack confidence** in their knowledge of how to buy and eat more environmentally friendly and sustainable foods (**28%** vs. 20%)
- Belgians are more likely than most other countries to say that **less than half** of the food served in public canteens in the EU should be sustainably produced (**18%** vs. 14%)
- Belgians are more likely than average to say the following have **some/no responsibility** for ensuring that the food they sell is sustainable:
 - Large food retailers (**35%** vs. 30%)
 - Public sector canteens (**51%** vs. 43%)
- Belgians are more likely than most other countries to select cost of heating (33%) as one of their top three most important issues.

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Estonia key standouts

Estonians are less likely than average* to say businesses must take action to improve product sustainability, particularly manufacturing businesses

- Estonians are more likely than most other countries to say the following have **some/no responsibility** for ensuring that the food they sell is sustainable:
 - Large food retailers (**35%** vs. 30%)
 - Public sector canteens (**50%** vs. 43%)
- Estonians are **less** likely than average to believe that all food retail businesses must:
 - Increase sales of plant-based protein sources (e.g. lentils, tofu, veggie burgers) while also reducing sales of animal meat (**34%** vs. 46%)
 - Source a lot less meat, dairy and eggs from unsustainable food producers (**44%** vs. 52%)
- Furthermore, Estonians are **less** likely than average to believe that all food manufacturing businesses must:
 - Source a lot less meat, dairy and eggs from unsustainable food producers (**47%** vs. 54%)
 - Use more types of vegetable or animal (e.g. sheep and cow and chicken), or varieties of vegetable or animal (e.g. different kinds of tomatoes), as ingredients in their products (**52%** vs. 58%)
 - Source a lot more ingredients from sustainable food producers (**61%** vs. 69%)
 - Reduce their greenhouse gas emissions (**66%** vs. 73%)

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Finland key standouts (1)

Finns are more likely than average* to support cheaper sustainable food, and to believe that public canteens are especially responsible for providing it. However, they are less likely than average to say businesses must take action to improve product sustainability, particularly retail businesses.

- Finns are also more likely than average to say **more than half** of the food served in public canteens in EU/UK should be sustainably produced (**51%** vs. 46%)
- Finns are more likely than all other countries (except Sweden) to say the following organisations have **full/a lot of responsibility** for ensuring that the food they sell is sustainable:
 - Small or medium-sized food manufacturers (**61%** vs. all-country average of 51%)
 - Public sector canteens (**64%** vs. all-country average of 53%)
- Furthermore, Finns are less likely than average to believe that all food retail businesses must:
 - Increase sales of plant-based protein sources (e.g. lentils, tofu, veggie burgers) while also reducing sales of animal meat (**34%** vs. 46%)
 - Source a lot less meat, dairy and eggs from unsustainable food producers (**42%** vs. 52%)
 - Stop advertising or promoting their least sustainable products (**41%** vs. 50%)
 - Source a lot more food from sustainable food producers (**61%** vs. 68%)

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Finland key standouts (2)

- In addition, Finns are less likely than average to believe that all food manufacturing businesses must:
 - Source a lot less meat, dairy and eggs from unsustainable food producers (**47%** vs. 54%)
 - Use more types of vegetable or animal (e.g. sheep and cow and chicken), or varieties of vegetable or animal (e.g. different kinds of tomatoes), as ingredients in their products (**46%** vs. 58%)
- Finns are more likely than average to say that in future sustainable food should cost **less** than unsustainable food (**46%** vs. 38%)
- Finns are more likely than average to select the cost of housing (**42%** vs. 32%) and the cost of petrol (**34%** vs. 25%) as one of their top three most important issues.
- Finns are more likely than all other countries (except Estonia) to say that climate change has become **less important** to them over the last 12 months (**18%** vs all-country average of 11%). They are also more likely than all other countries (except Sweden) to say the same of immigration (**23%** vs. all-country average of 18%)

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – France key standouts

The French are more likely than average* to see climate change as an important issue, and to say that businesses should stop advertising unsustainable products.

- The French are more likely than those average of 12%). in all other countries to say that public canteens in EU/UK **should not** have at least one **plant-based option** (19% vs. all-country
- Furthermore, the French are also more likely than all other countries (except Poland) to say that large food manufacturers have **some/no responsibility** for ensuring that the food they sell is sustainable (29% vs. all-country average of 22%).
- The French are more likely than those in all other countries to **believe** that all food retail businesses must stop advertising or promoting their least sustainable products (59% vs. all-country average of 50%). They are also more likely than all other countries (except for Spain) to believe that all food manufacturing businesses must stop advertising or promoting their least sustainable products as well (60% vs. all-country average of 53%).
- The French are more likely than average to select climate change (38% vs. 30%) and the cost of petrol (32% vs. 25%) as one of their top three most important issues.
- The French are more likely than those in all other countries to say that deforestation has become **more** important to them over the last 12 months (65% vs all-country average of 52%). They are more likely than all other countries (except Portugal) to say that climate change has become **more** important to them over the last 12 months (74% vs all-country average of 59%).

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Greece key standouts

Greeks are more likely than average* to say manufacturing businesses must take responsibility and action to ensure the sustainability of their products

- Greeks are more likely than those in all other countries to **agree** that public canteens in the EU should always provide at least one plant-based meal (**89%** vs. all-country average of 78%).
- Greeks are more likely than those in all other countries to say that **large food manufacturers** have **full/a lot** of responsibility for ensuring the food they sell was produced sustainably (**84%** vs. all-country average of 75%).
- Greeks are more likely than those in all other countries (except Spain) to believe all **food retail businesses** must increase sales of plant-based protein sources while also reducing sales of animal meat (**58%** vs. all-country average of 46%)
- Greeks are more likely than average to **believe** that all **food manufacturing businesses** must:
 - Reduce their greenhouse gas emissions (**80%** vs 73%)
 - Source a lot more ingredients from sustainable food producers (**74%** vs. 69%)
- Greeks who say sustainable food should cost less, are more likely than those in all other countries to say this should be achieved by making sustainable food **cheaper to encourage consumers to buy it** (**77%** vs. all-country average of 66%)
- Greeks are more likely than all other countries to select the cost of heating (**38%** vs. 27%) as one of their top three most important issues.
- Greeks are more likely than average to say that the cost of petrol (**78%** vs. 70%) became **more important** to them over the last twelve months.

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Portugal key standouts (1)

The Portuguese are more likely than average* to say public canteens and businesses must take responsibility and action to ensure the sustainability of their products, though they expect more of large than SME retailers.

- The Portuguese are more likely than those in every other country to say that **more than half** of the food served in these public canteens should be sustainably produced (**64%** vs. all-country average of 46%)
- The Portuguese are more likely than average to say the following have **full/a lot of responsibility** for ensuring that the food they sell is sustainable:
 - Large food retailers (**75%** vs. 66%)
 - Public sector canteens (**60%** vs. 53%)
- However, they are also more likely than those in all other countries to say that small and medium-sized food retailers have **some/no responsibility** for ensuring that the food they sell is sustainable (**62%** vs. 51%)
- The Portuguese are **more** likely than average to believe that all food retail businesses must:
 - Reduce their greenhouse gas emissions (**76%** vs. 71%)
 - Source a lot more food from sustainable food producers (**73%** vs. 68%)
 - Increase sales of plant-based protein sources while also reducing sales of animal meat (**52%** vs. 46%)

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Portugal key standouts (2)

- The Portuguese are **more** likely than average to **believe** that all food manufacturing businesses must:
 - Reduce their greenhouse gas emissions (**77%** vs 73%)
 - Source a lot more ingredients from sustainable food producers (**76%** vs. 69%)
 - Use more types of vegetable or animal (e.g. sheep and cow and chicken), or varieties of vegetable or animal (e.g. different kinds of tomatoes), as ingredients in their products (**65%** vs. 58%)
- The Portuguese are more likely than average to say that sustainable food should cost **more** than unsustainable food (**28%** vs. 20%)
- The Portuguese are more likely than those in every other country to say that the following issues have become **more important** to them over the last 12 months (score vs. all-country average):
 - Cost of food (**92%** vs. 83%)
 - Cost of housing (**80%** vs 71%)
 - Work/study-life balance (**67%** vs. 49%)

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Sweden key standouts

Swedes are more likely than average* to see SME businesses as responsible for product sustainability

- Swedes are more likely than those in all other countries to say the following organisations have **full/a lot** of responsibility for ensuring that the food they sell is sustainable (score vs all-country average):
 - Small or medium-sized food manufacturers (**68%** vs. 51%)
 - Small or medium-sized food retailers (**62%** vs. 45%)
 - Public sector canteens (**69%** vs. 53%)
- Swedes are more likely than average to select the cost of housing (**38%** vs. 32%) as one of their top three most important issues.
- Swedes are more likely than average to say that the following issue became **less important** to them over the last 12 months:
 - Ease of international travel (**34%** vs. 28%)
 - Ability to save for retirement (**14%** vs. 11%)
 - Deforestation (**16%** vs. 11%)
 - Cost of petrol (**16%** vs. 10%)
 - Cost of heating (**10%** vs. 7%)

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Germany key standouts

Germans are more likely than average* to see animal extinction as an important issue, and to be willing to see unsustainable food become more expensive to deter consumers from buying it.

- Germans are more likely than average to say that small or medium-sized food retailers have **full/a lot of responsibility** for ensuring that the food they sell was produced sustainably (**50%** vs. 45%)
- Germans are more likely than average to say that in the future sustainable food should cost **more** than unsustainable food (**28%** vs. 20%)
- Germans who say that sustainable food should cost less in future are **more** likely than average to say this should be achieved by making unsustainable food **more expensive** to deter consumers from buying it (**18%** vs. 12%)
- Germans are more likely than average to select the cost of heating (**32%** vs 27%) and animals going extinct (**24%** vs 18%) as one of their top three most important issues.
- Germans are more likely than average to say that animals going extinct has become **more important** to them in the last 12 months (**59%** vs. 54%).
- Germans are also more likely than average to say that COVID-19 has become **less important** to them in the last 12 months (**47%** vs. 42%).

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Spain key standouts (1)

Spaniards are more likely than average* to say public canteens and businesses must take action to ensure the sustainability of their products, to expect the most of large food manufacturers, and to see the issue of food sustainability as important.

- Spaniards are more likely than those in every other country (except Greece) to **agree** that public canteens in EU/UK should always provide at least one **plant-based option** (**86%** vs. 78%)
- Spaniards are more likely than average to say that **more than half** of the food served in public canteens in EU/UK should be sustainably produced (**50%** vs. 46%)
- Spaniards are more likely than average to say that large food manufacturers have **full/a lot of responsibility** for ensuring the food they sell was produced sustainably (**78%** vs. 75%)
- Spaniards are more likely than average to **believe** that all food retail businesses must:
 - Reduce their greenhouse gas emissions (**75%** vs. 71%)
 - Source a lot more food from sustainable food producers (**74%** vs. 68%)
 - Stop advertising or promoting their least sustainable products (**56%** vs. 50%)
 - Increase sales of plant-based protein sources (e.g. lentils, tofu, veggie burgers) while also reducing sales of animal meat (**58%** vs. 46%)

** All country average, 2023 (includes both the UK and EU countries)*

Executive Summary – Spain key standouts (2)

- Spaniards are more likely than average to **believe** that all food manufacturing businesses must perform **all** the actions tested (see list below).
 - Reduce their greenhouse gas emissions (**82%** vs 73%)
 - Source a lot more ingredients from sustainable food producers (**77%** vs. 69%)
 - Use more types of vegetable or animal (e.g. sheep and cow and chicken), or varieties of vegetable or animal (e.g. different kinds of tomatoes), as ingredients in their products (**70%** vs. 58%)
 - Source a lot less meat, dairy and eggs from unsustainable food producers (**62%** vs. 54%)
 - Stop advertising or promoting their least sustainable products (**61%** vs. 53%)
- Spaniards are more likely than those in every other country to select whether their food is sustainable (**16%** vs. all-country average of 9%) as one of their top three most important issues. They are also more likely than those in every other country to say that their food being sustainable has become **more** important to them over the last 12 months (**59%** vs. all-country average of 47%).

** All country average, 2023 (includes both the UK and EU countries)*

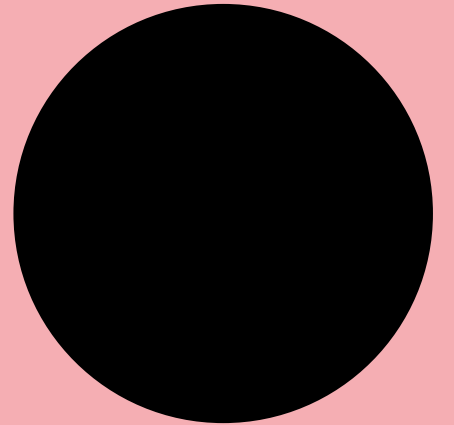
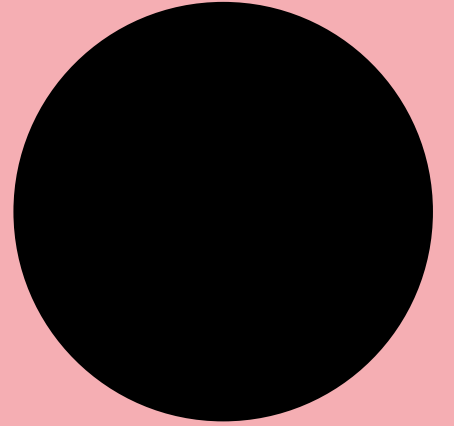
Executive Summary – Poland key standouts

Poles are less likely than average* to see large businesses as responsible for ensuring the sustainability of their products.

- Poles are more likely than those in all other countries (except Finland) to say that the food we produce and consume has a **positive** impact on the environment (**22%** vs. 16%). Poles are also more likely than average to say that their own eating habits positively impact the environment (**29%** vs. 23%).
- Poles are more likely than average to say the following have **some/no responsibility** for ensuring that the food they sell is sustainable:
 - Large food manufacturers (**28%** vs. 22%)
 - Large food retailers (**37%** vs. 30%)
- Poles are more likely than average to select the cost of petrol (**31%** vs 25%) and COVID-19 (**13%** vs 8%) as one of their top three most important issues.
- Poles are more likely than average to say that the following issue have become **more important** to them over the last 12 months:
 - Cost of petrol (**78%** vs. 70%)
 - Immigration (**50%** vs. 44%)
 - COVID-19 (**37%** vs. 29%)

** All country average, 2023 (includes both the UK and EU countries)*

Appendix Three: The UK



Executive Summary – United Kingdom key standouts

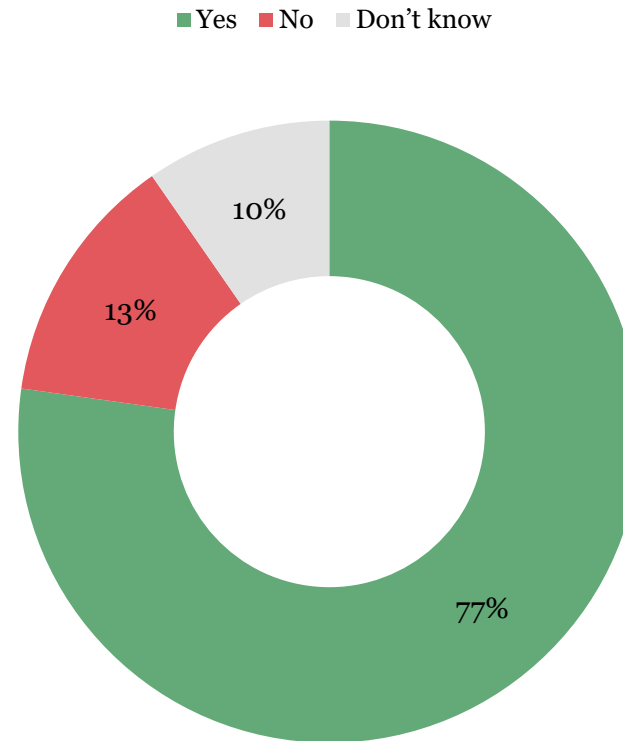
UK citizens are more likely than average* to see the cost of food as an important issue

- UK citizens are more likely than those in most countries to say that the food “we” produce and consume has a **positive** impact on the environment (**18%** vs. all-country average of 16%)
- UK citizens are more likely than those in all other countries (except Poland) to say that food produced outside of their country has a **positive** impact on the environment (**16%** vs all-country average of 11%)
- UK citizens are more likely than average to say that **less than half** of the food served in public canteens should be sustainably produced (**19%** vs. 14%)
- UK citizens are more likely than those in every other country to select the cost of food (**58%** vs. all-country average of 46%) and the cost of heating (**51%** vs 27%) as one of their top three most important issues.

** All country average, 2023 (includes both the UK and EU countries)*

Just over three quarters of UK respondents say that public sector canteens in the UK should always provide at least one plant-based option

The proportion of respondents in the UK that agree or disagree that public sector canteens in the UK should always provide at least one plant-based option

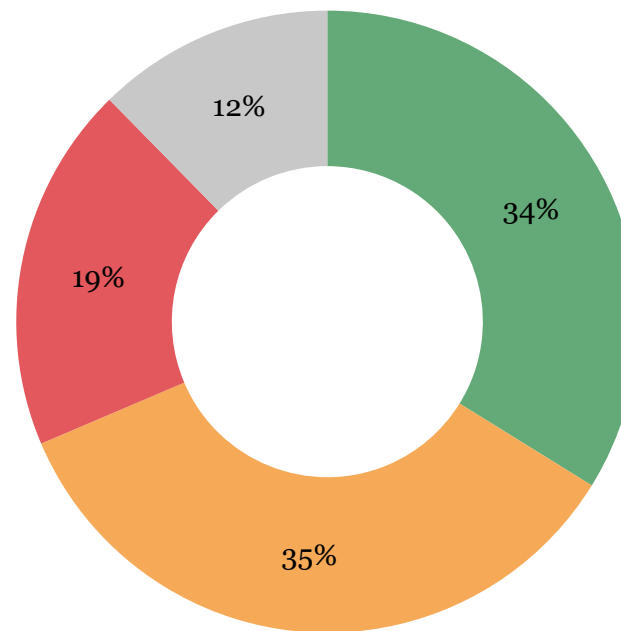


Should public sector canteens in the UK (e.g. those in schools, universities and hospitals) always provide at least one plant-based option? Plant-based options do not contain meat, dairy or eggs.

A third of UK respondents believe that public sector canteens should ensure that more than half of the food they serve each day should be sustainably produced

The proportion of respondents in the EU/each country that believe public canteens should ensure that more than half, about half or less than half of the food they serve each day, should be sustainably produced

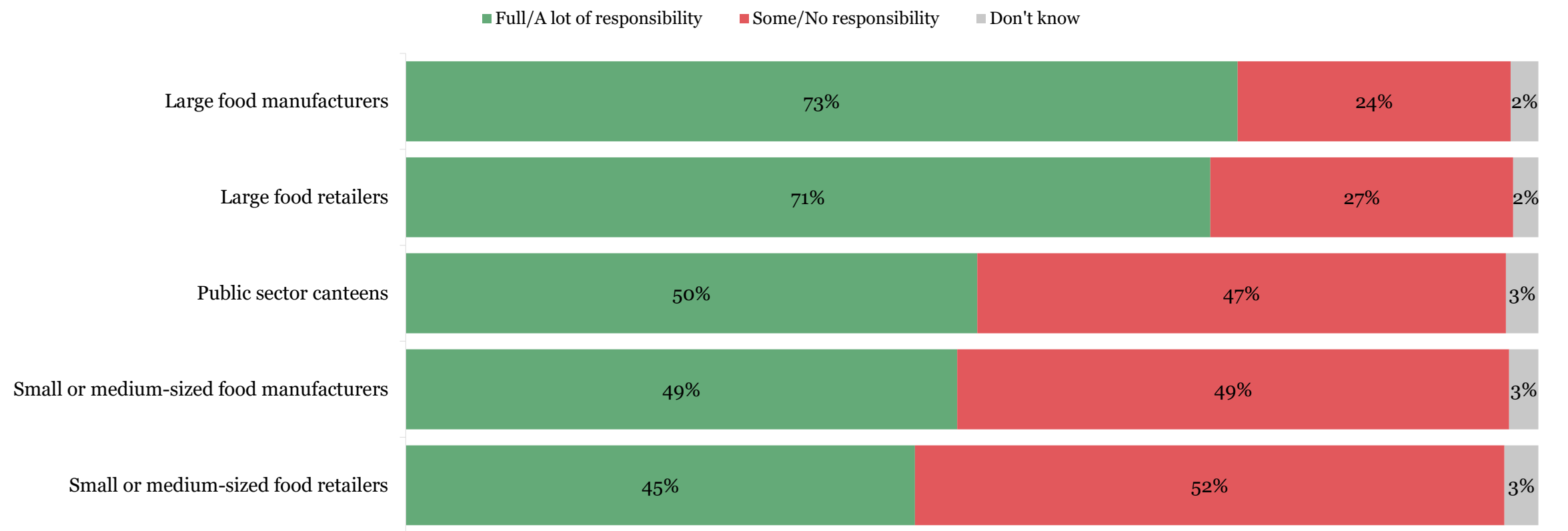
■ More than half ■ About half ■ Less than half ■ Don't know



What amount of the food they serve each day should public sector canteens in the UK (e.g. those in schools, universities and hospitals) ensure is sustainably produced?

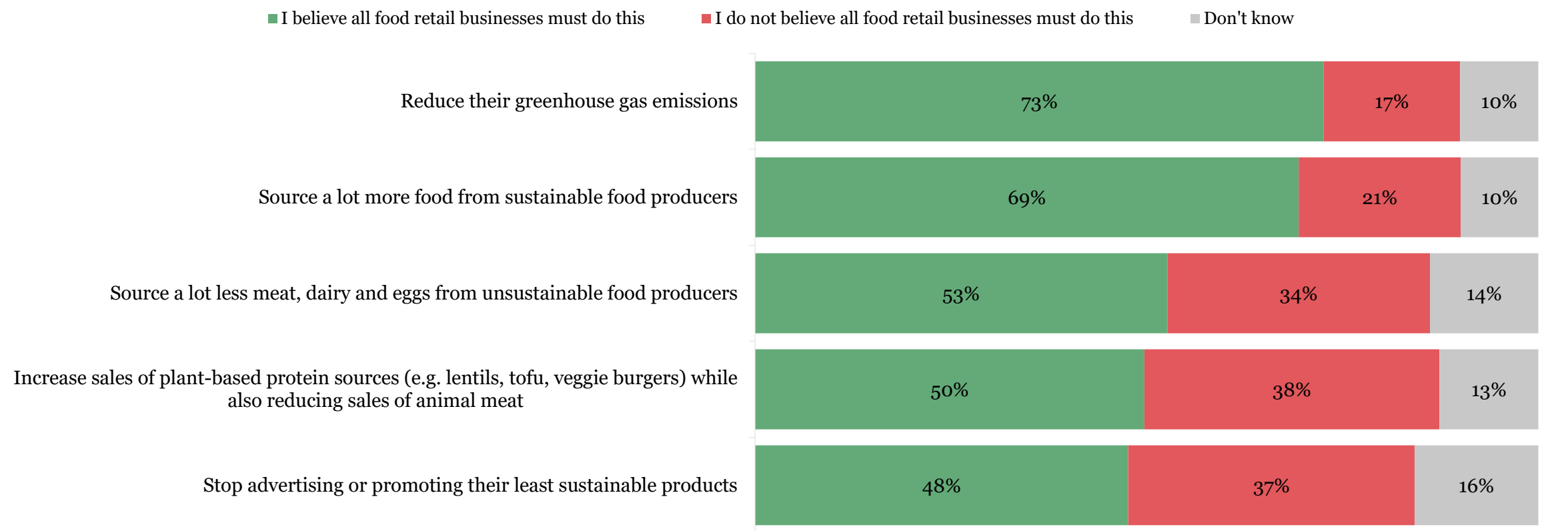
Seven in ten UK respondents see both large manufacturers and large retailers as having full/a lot of responsibility

The proportion of EU respondents who attribute each level of responsibility for ensuring that the food they sell is sustainable, to each organisation

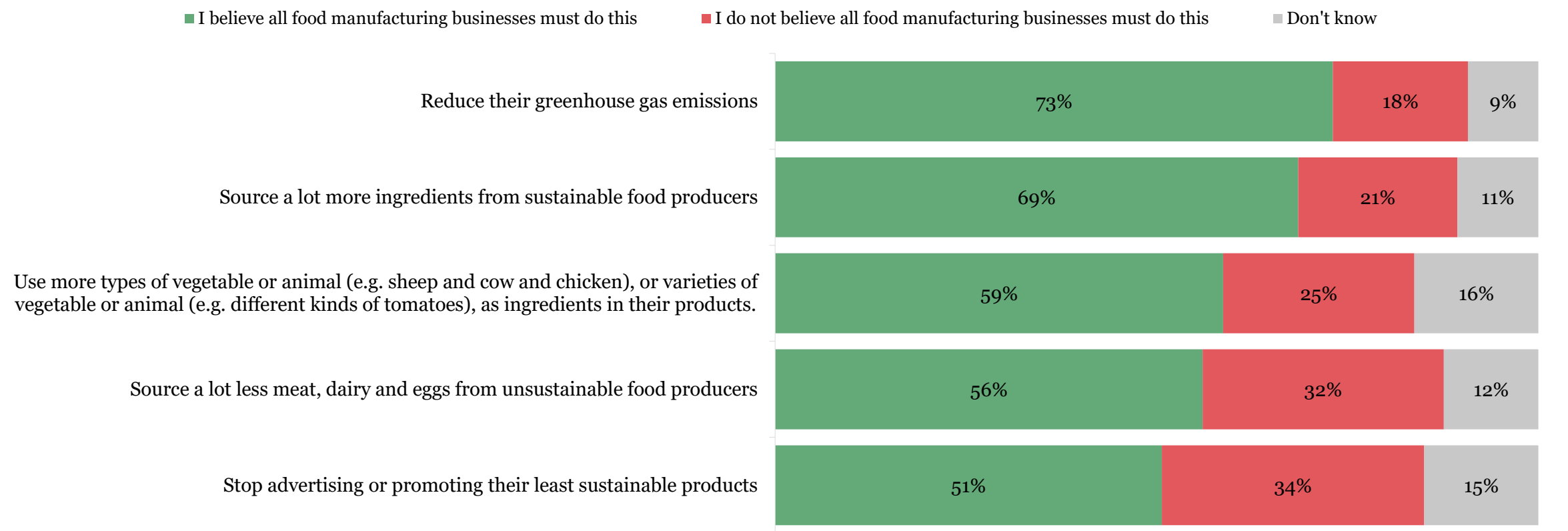


How much responsibility, if any, do you think the following organisations have for ensuring the food they sell was produced sustainably?

Seven in ten UK respondents believe that food retail businesses must reduce their greenhouse gas emissions and source a lot more food from sustainable food producers



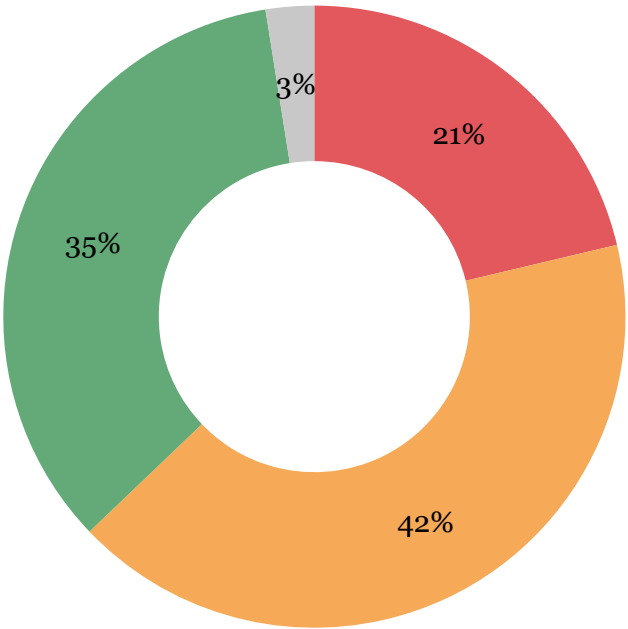
Seven in ten UK respondents believe that food manufacturing businesses must reduce their greenhouse gas emissions and source a lot more food from sustainable food producers



More people in the UK think that in future sustainable food should cost the same as unsustainable food, than think sustainable food should cost less than unsustainable food

he proportion of UK respondents who believe that in the future sustainable food should cost less, the same, or more than unsustainable food

Should cost more Should cost the same Should cost less Don't know

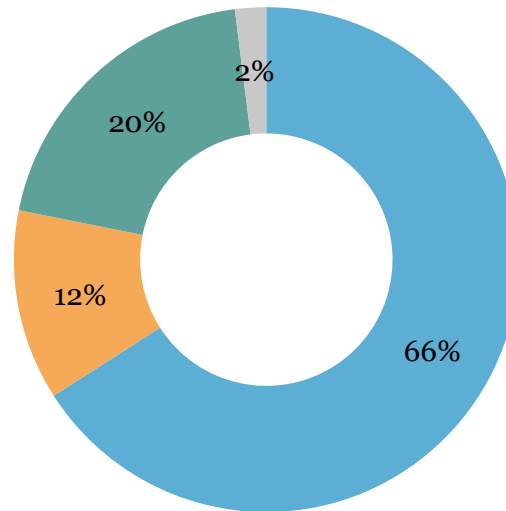


Thinking about the price of sustainable food, do you believe in future it should cost more, or less, than unsustainable food?

Two thirds of UK respondents who believe sustainable food should cost less than unsustainable food say this should be achieved by making sustainable food cheaper than unsustainable food

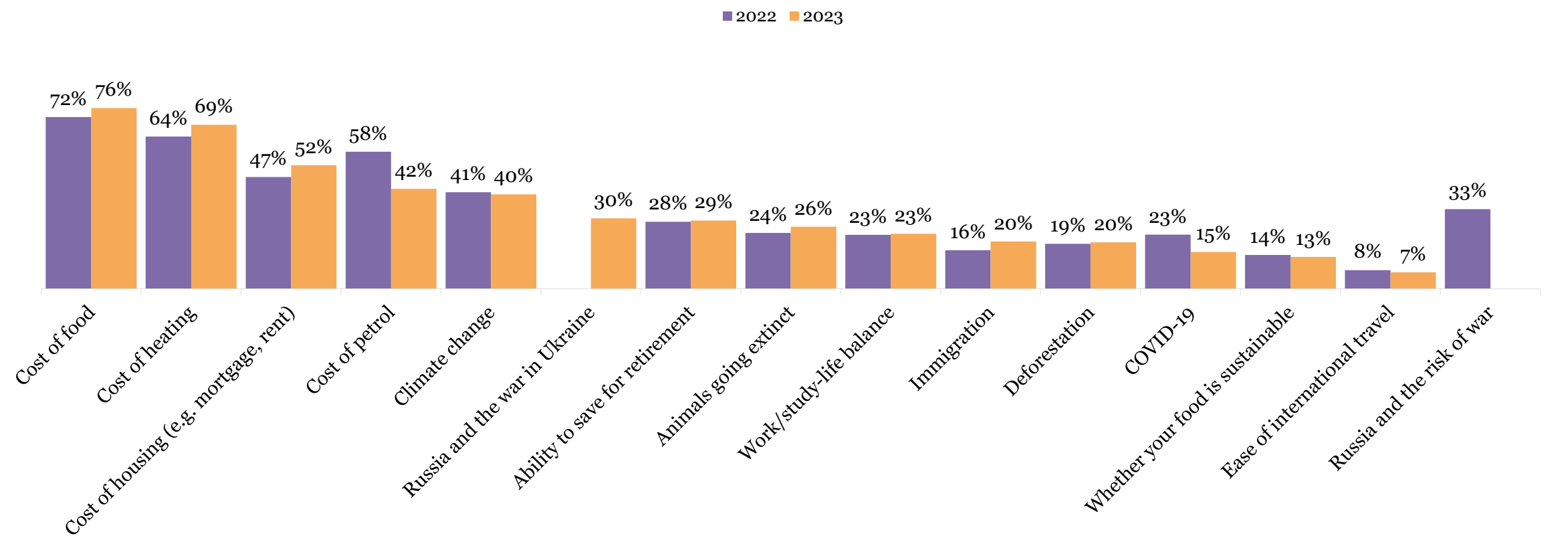
The proportion of UK respondents who believe that in the future sustainable food should cost less, who selected each option as the way to achieve that goal

- Sustainable food should be made cheaper to encourage consumers to buy it
- Unsustainable food should be made more expensive to deter consumers from buying it
- Sustainable food should be made cheaper and unsustainable food should be made more expensive
- Don't know



UK respondents are more likely to see issues related to the cost of living as more important in 2023, relative to 2022

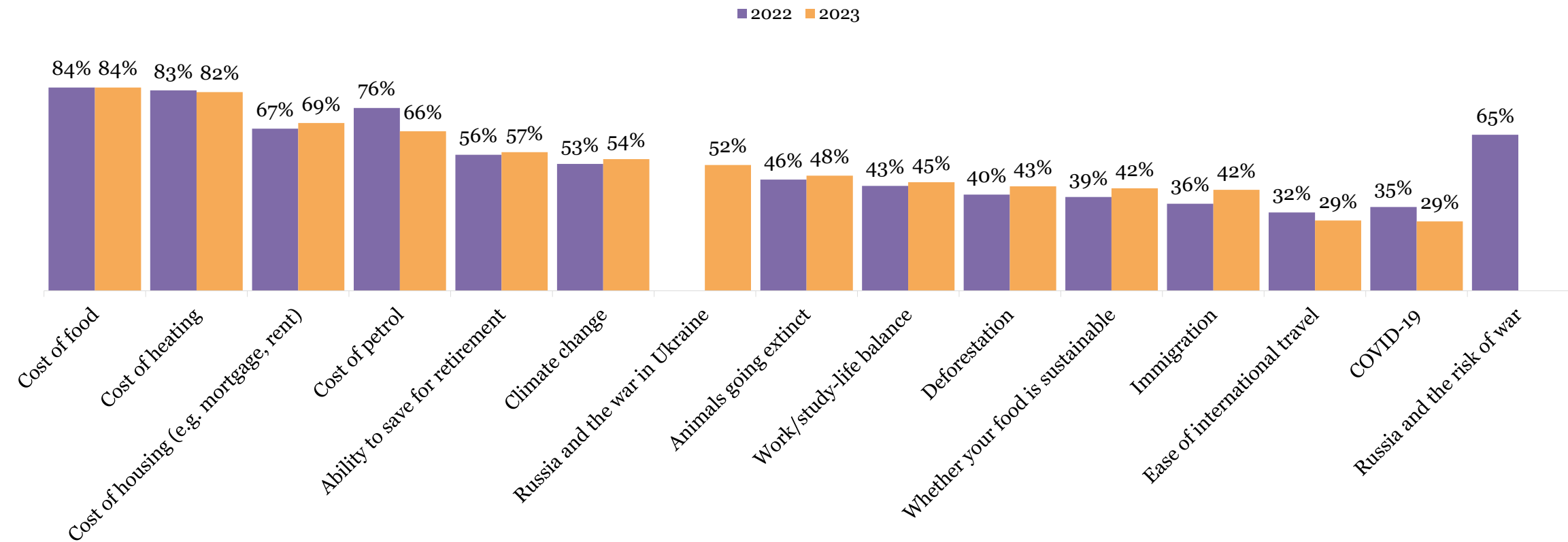
The proportion of respondents in the UK who selected each of the following issues as being one of the top five most important issues to them personally



Q18: Which of the following do you see as the top five most important issues for you personally?

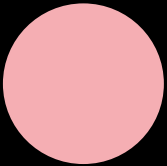
In 2023 UK respondents were more likely to report than food sustainability became more important to them over the last 12 months, than they were in 2022

The proportion of UK respondents for whom the importance of the following issues has grown over the last 12 months



Q19. Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

Thank you



Adam Brodie

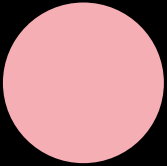
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