

# CONSUMER ATTITUDES AND VIEWS ON SUSTAINABLE FOOD SYSTEMS

*WITH RESULTS FROM A NEW EUROBAROMETER SURVEY*

---

Klaus G. Grunert

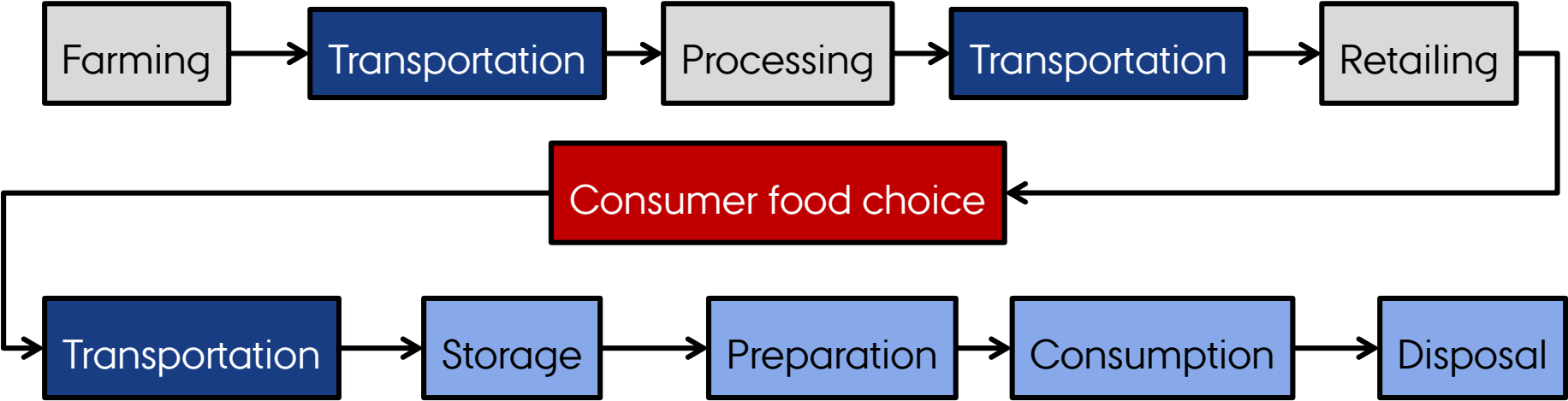
*MAPP Centre, Aarhus University*



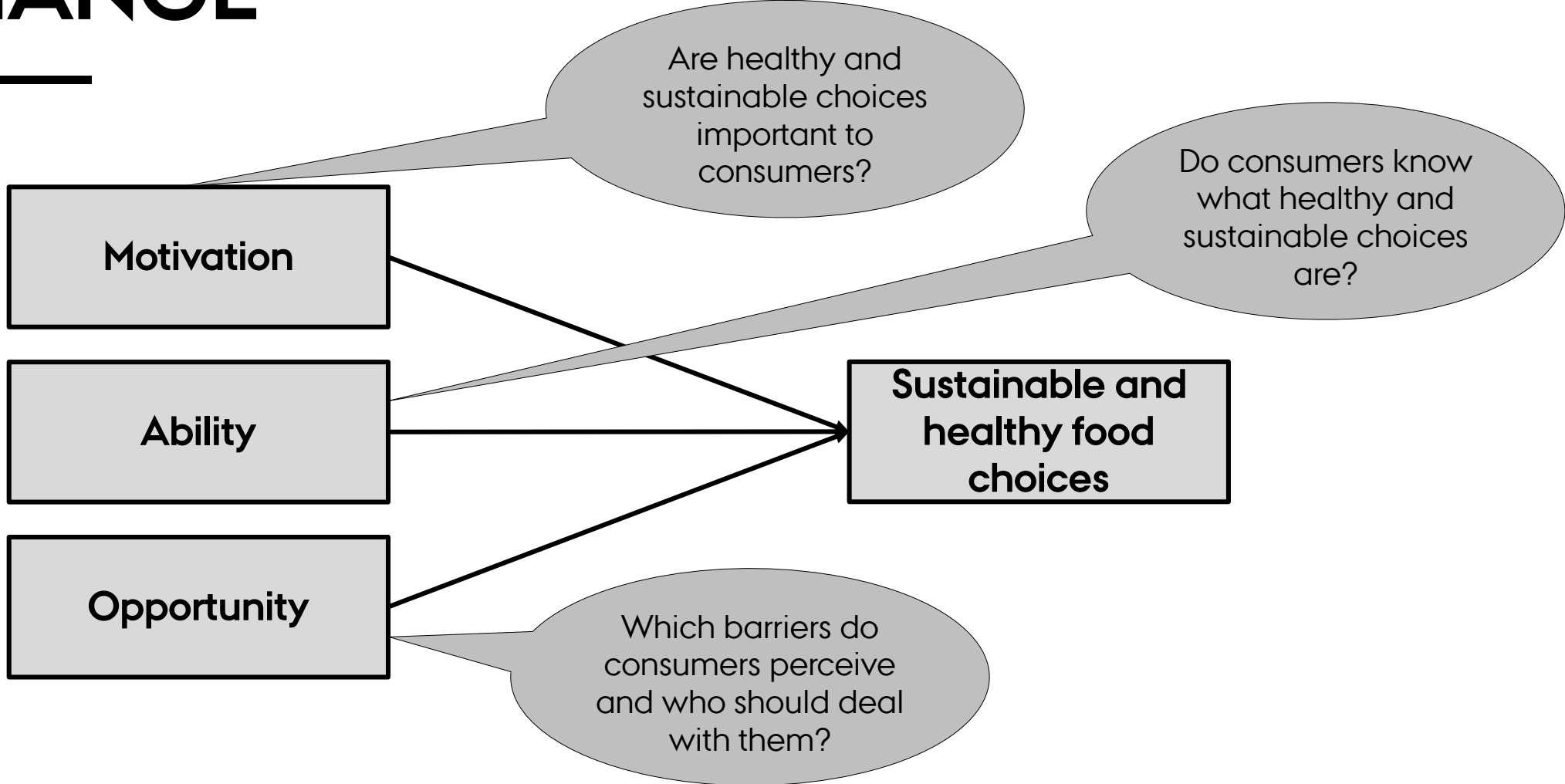
MAPP - RESEARCH ON VALUE CREATION IN THE FOOD SECTOR  
DEPARTMENT OF MANAGEMENT  
AARHUS UNIVERSITY



# THE ROLE OF CONSUMERS IN THE TRANSITION TO A HEALTHY AND SUSTAINABLE FOOD SYSTEM



# THE DETERMINANTS OF BEHAVIOURAL CHANGE



# AIMS AND OVERVIEW

---

To shed light on consumers' motivation, ability and opportunity to engage in more healthy and sustainable food choices

To do this on the basis of results from a new Eurobarometer study

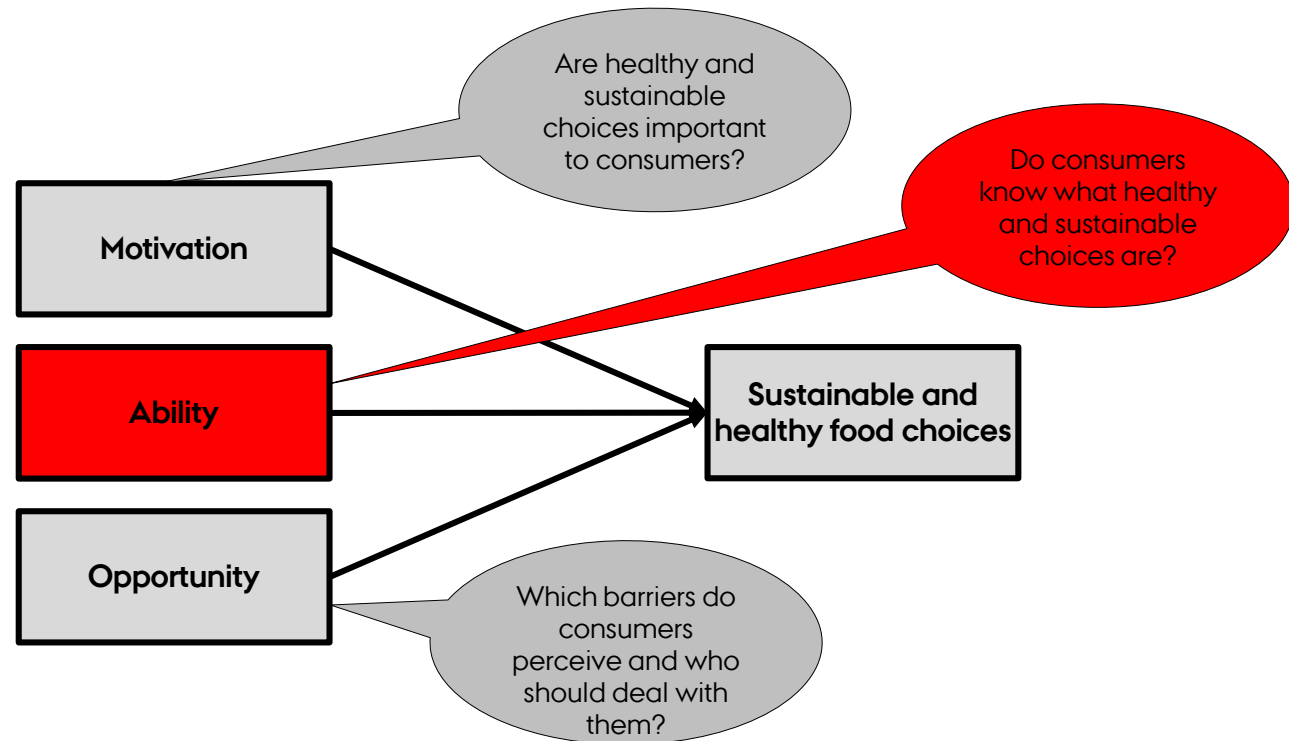
1. What does sustainable food mean to consumers?
2. Has sustainability any impact on consumer food choice?
3. What are the barriers towards more sustainable choices and who should do something about a more sustainable food supply?

# EUROBAROMETER METHODOLOGY

---

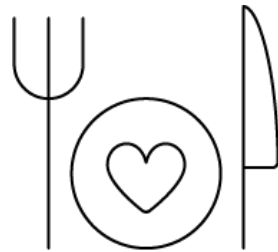
- Survey conducted face to face in respondents' home in most Member States. Due to covid-19, different methodologies were used in some countries:
  - *BE, ES - a combination of face-to-face and online probabilistic panel*
  - *NL, DK - a combination of face-to-face and push-to-web*
  - *EE, FI, IE, LU, SE - online probabilistic*
- Fieldwork: 3 August to 15 September 2020
- Population: EU citizens aged 15+
- Coverage: 27 EU Member States
- Number of interviews: 27,237

# What does sustainable food mean to consumers?



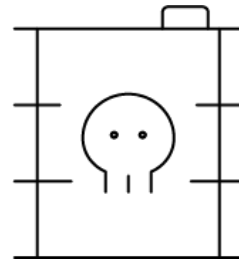
# WHAT ARE THE MAIN CHARACTERISTICS OF “SUSTAINABLE” FOOD?

According to the consumers, the top 3 characteristics of “sustainable” food are:



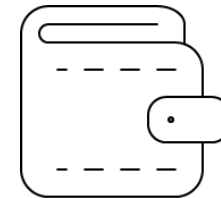
Nutritious and healthy

41%



Little or no use of pesticides

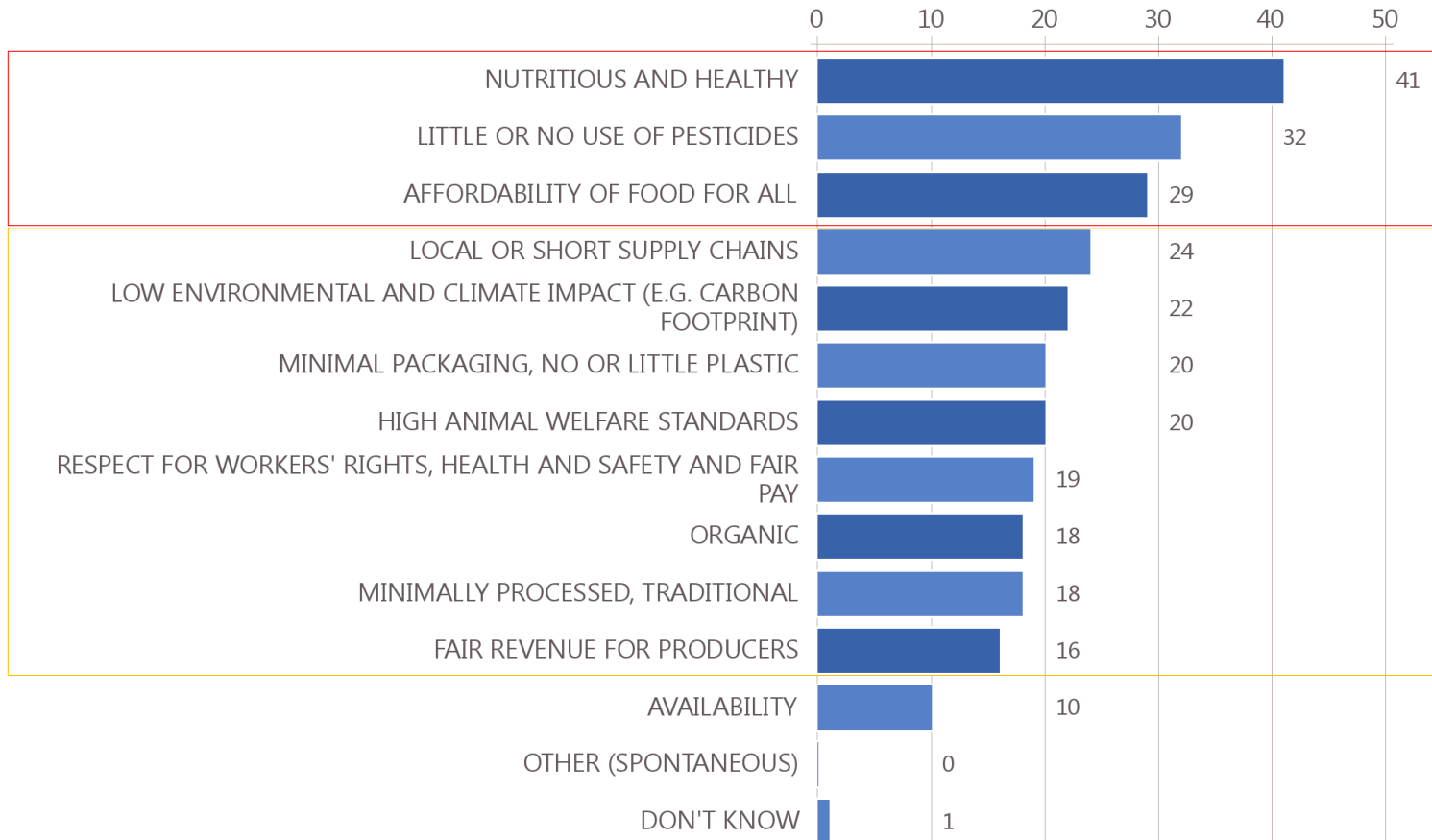
32%



Affordability of food for all

29%

**QB2T** Which of the following do you consider to be the most important characteristic of "sustainable" food? Firstly? And then? (MAX. 3 ANSWERS)  
 (% - EU)

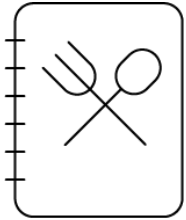


Young people more likely to mention environmental and climate impact



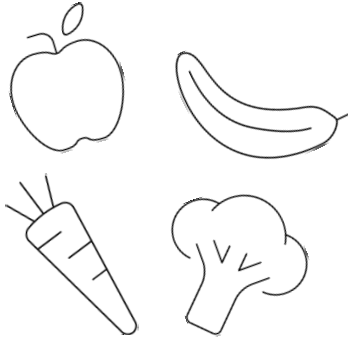
# WHAT MAKES A DIET SUSTAINABLE?

For most Europeans, 'eating a healthy and sustainable diet' involves the following:



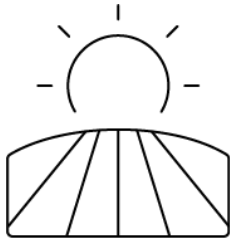
Eating a variety of different foods, having a balanced diet

58%



Eating more fruits and vegetables

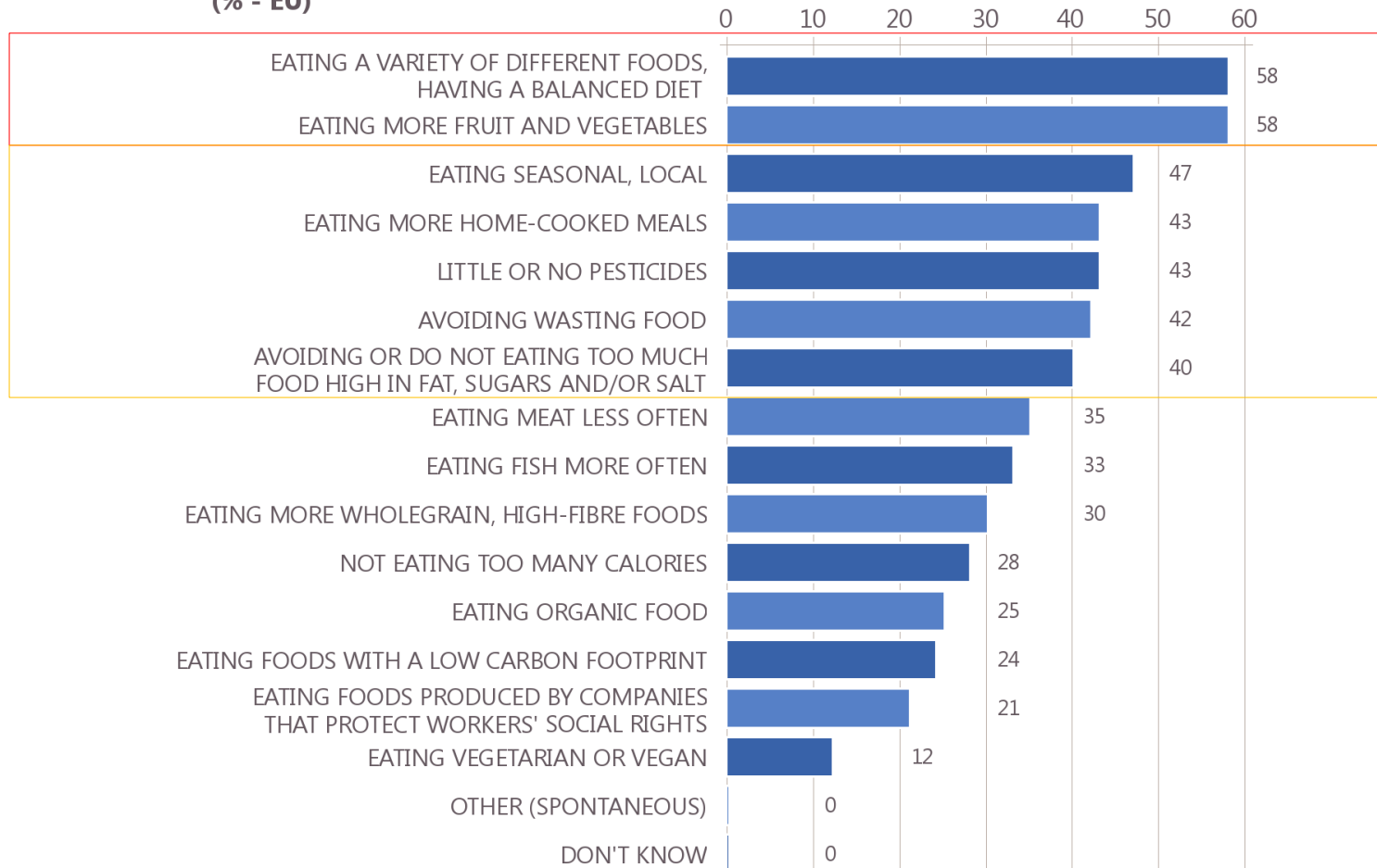
58%



Eating seasonal, local

47%

**QB4** We often hear people talking about the importance of eating a healthy and sustainable diet. What do you think "eating a healthy and sustainable diet" involves?  
 (MULTIPLE ANSWERS POSSIBLE)  
 (% - EU)



Eating a variety of different foods more often mentioned by more educated and higher class consumers

Middle and upper class more likely to mention eating less meat

# WHAT DOES SUSTAINABLE FOOD MEAN TO CONSUMERS?

---

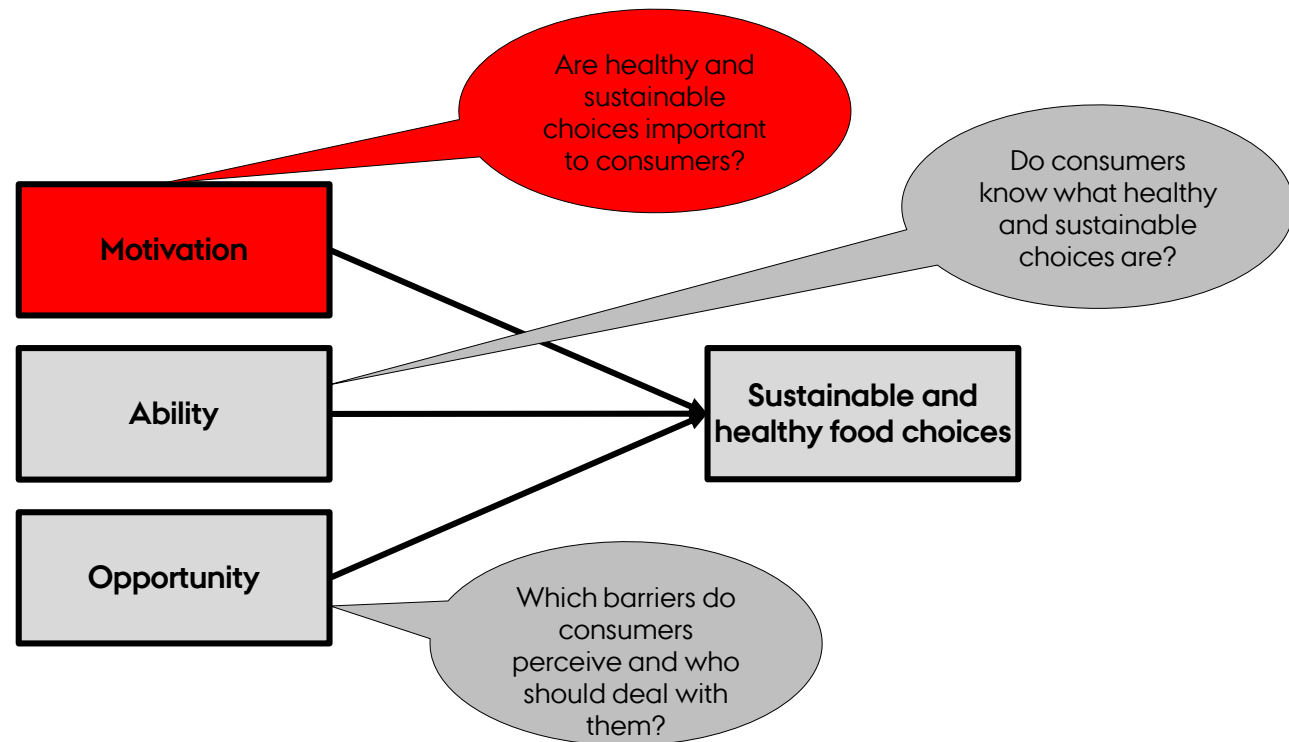
Consumers have no problems relating to the concept of 'sustainable food'

Nutrition and health is the single most mentioned element of sustainable food – mentioned more often than factors like environmental or climate impact

Likewise, a sustainable diet is mostly linked to a nutritionally well-composed diet

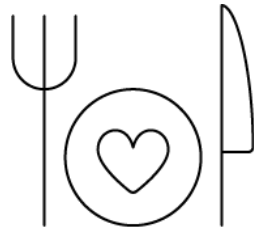
In the context of food, therefore, sustainability is currently most related to self-relevant aspects more than environmentally relevant aspects

# Has sustainability any impact on consumer choice?



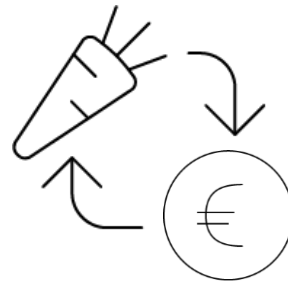
# WHAT ASPECTS OF A SUSTAINABLE DIET ARE IMPORTANT TO YOU?

For Europeans, the most important aspect of a “sustainable” diet is that it is healthy; but two other aspects are mentioned by at least four in ten of them:



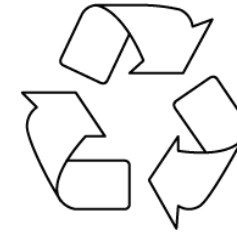
What you eat is healthy for you

74%



What you eat supports local economy

50%



What you eat has been produced in a way that minimises waste

40%

**QB3T** What aspects of a sustainable diet are important to you? Firstly? And then? (MULTIPLE ANSWERS POSSIBLE)  
 (% - EU)



Ethics and fair trade more often mentioned by middle and upper class

Ethics more often mentioned by young consumers

# WHAT ASPECTS OF A SUSTAINABLE DIET ARE IMPORTANT TO CONSUMERS?

---

Also here, the health aspect dominates

However, other aspects – e.g., supporting the local economy, minimising waste, paying fair salaries – also play a role

Hence, consumers believe that having a sustainable diet has some importance, and the importance mirrors their understanding of what a sustainable diet is

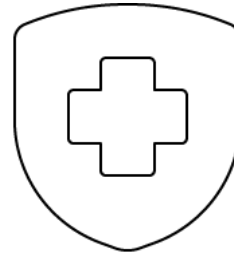
# SUSTAINABILITY IS IMPORTANT, BUT... WHAT DRIVES CONSUMERS' FOOD PURCHASES?

When consumers buy food, they say that the 3 most important aspects to them are:



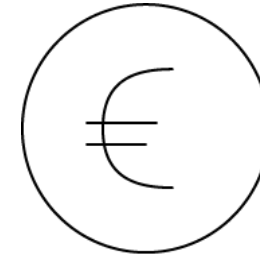
Taste

45%



Food safety

42%

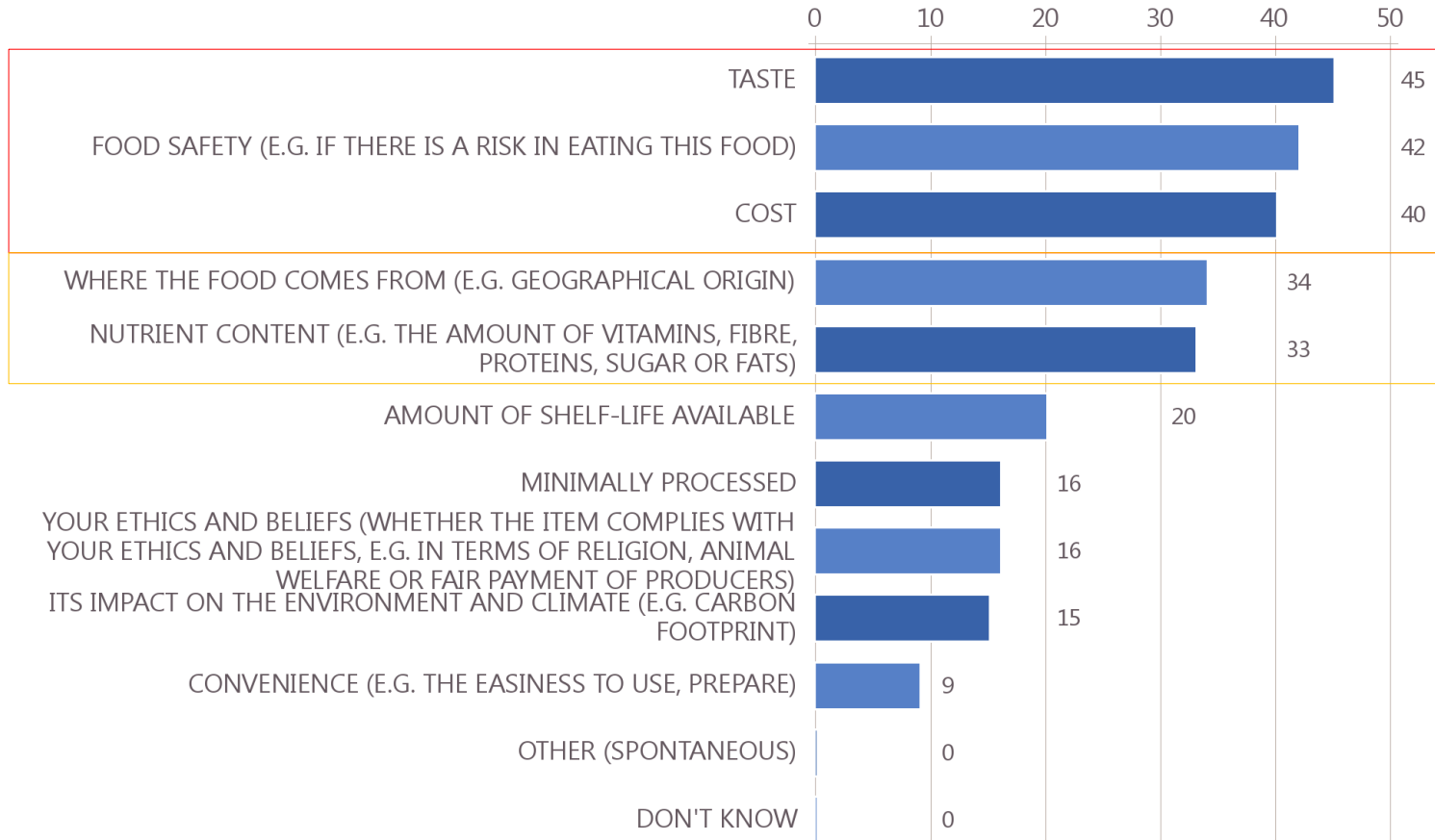


Cost

40%



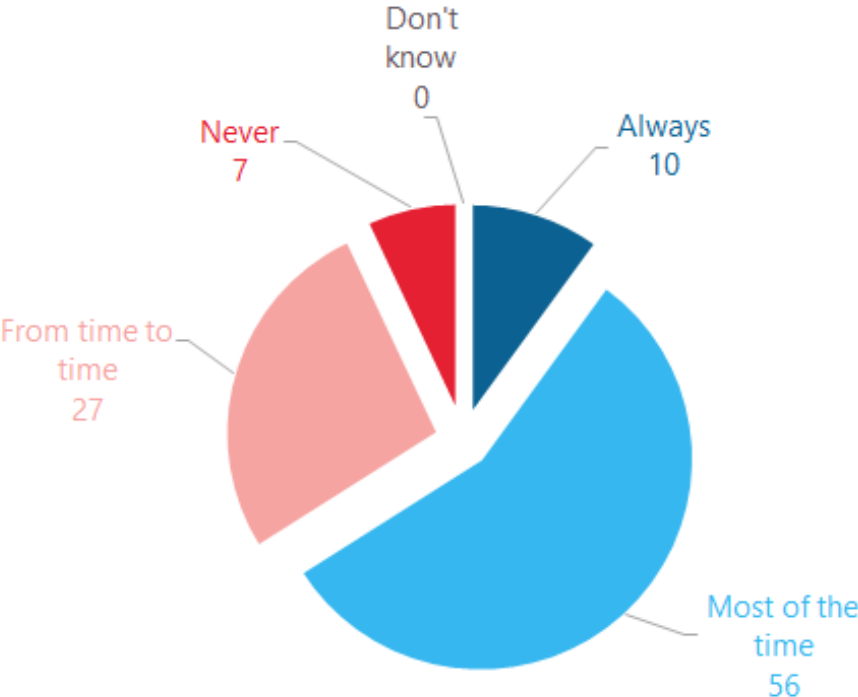
**QB1T** When you buy food, which of the following are the most important to you? Firstly? And then? (MAX. 3 ANSWERS)  
 (% - EU)



Safety mentioned more often by older and less educated consumers

# ARE DIETS ALREADY HEALTHY AND SUSTAINABLE?

QB6 Would you say that personally, you eat a healthy and sustainable diet...? (% - EU)



# HAS SUSTAINABILITY ANY IMPACT ON CONSUMER CHOICE?

---

Consumers regard sustainability as important – and the most important aspects are, again, whether the food they consume is healthy

However, food choice is still dominated by the classical main criteria – taste, costs and safety

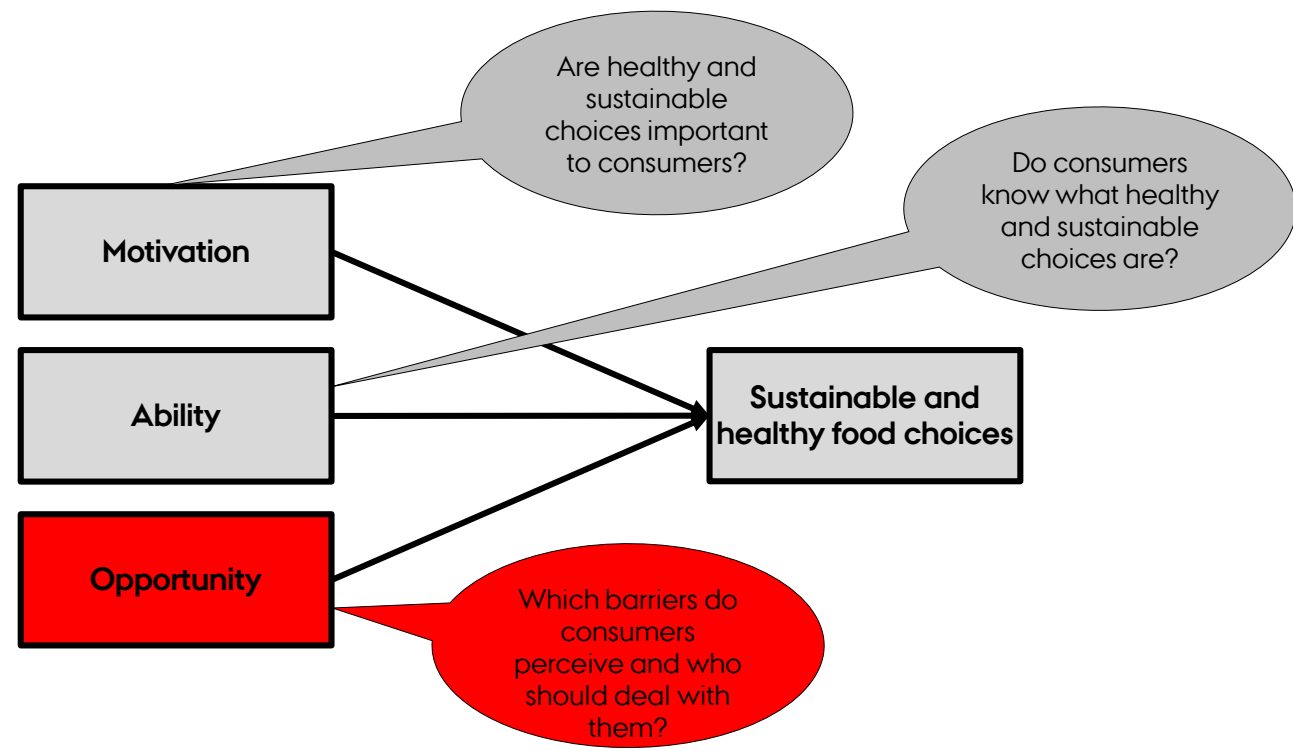
In addition, many consumers believe that their diet is already healthy and sustainable

Promoting more healthy and sustainable choices therefore has to overcome two important barriers:

- Optimistic bias – people believing that they are already doing the right thing
- Trade-offs – people believing that health and sustainability are at the expense of cost and taste

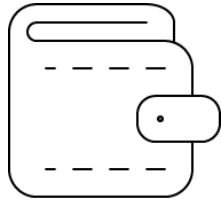


# What are the barriers towards sustainable choice? Who should do something about the sustainable food supply?



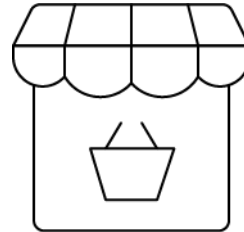
# MAIN BARRIERS TO SUSTAINABLE CHOICES

**Affordability, availability and clear information are the three most mentioned aspects that would motivate the respondents to adopt a healthy diet**



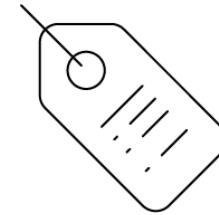
Healthy, sustainable choices are affordable

49%



Healthy, sustainable food choices are available where you shop for food

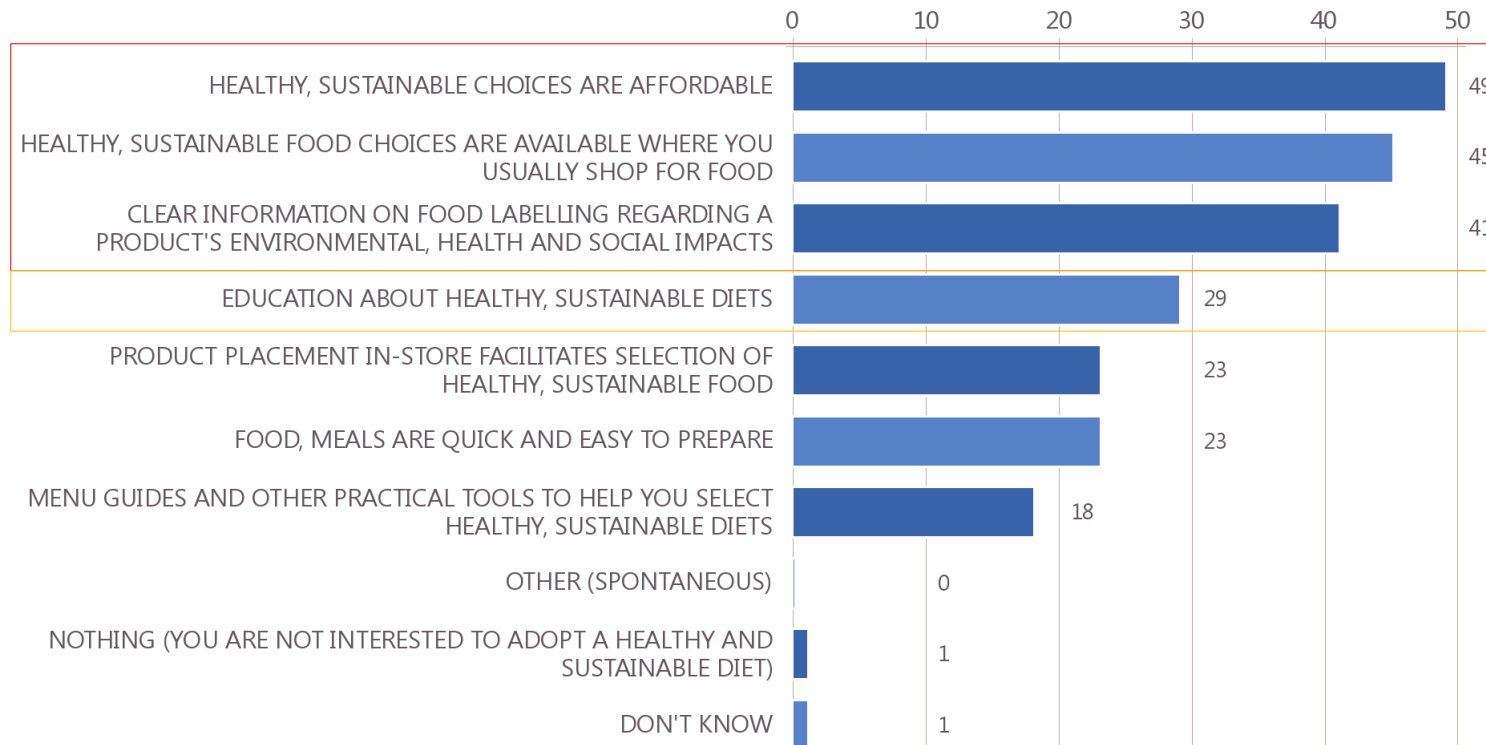
45%



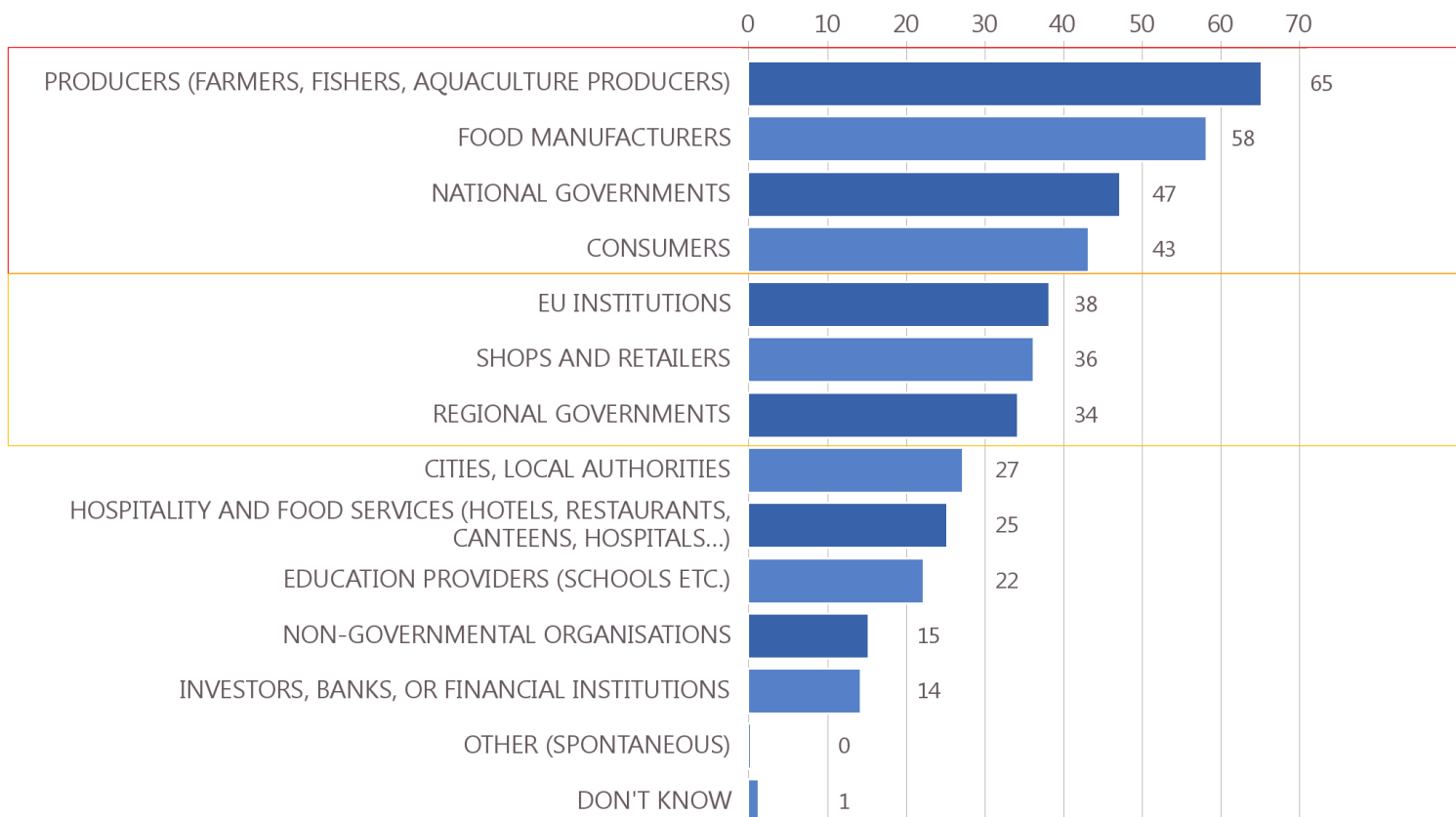
Clear information on food labelling regarding a product's environmental, health and social impacts

41%

**QB7** What would help you to adopt a healthy and sustainable diet? From the options below, please select the three most important for you. (MAX. 3 ANSWERS)  
 (% - EU)

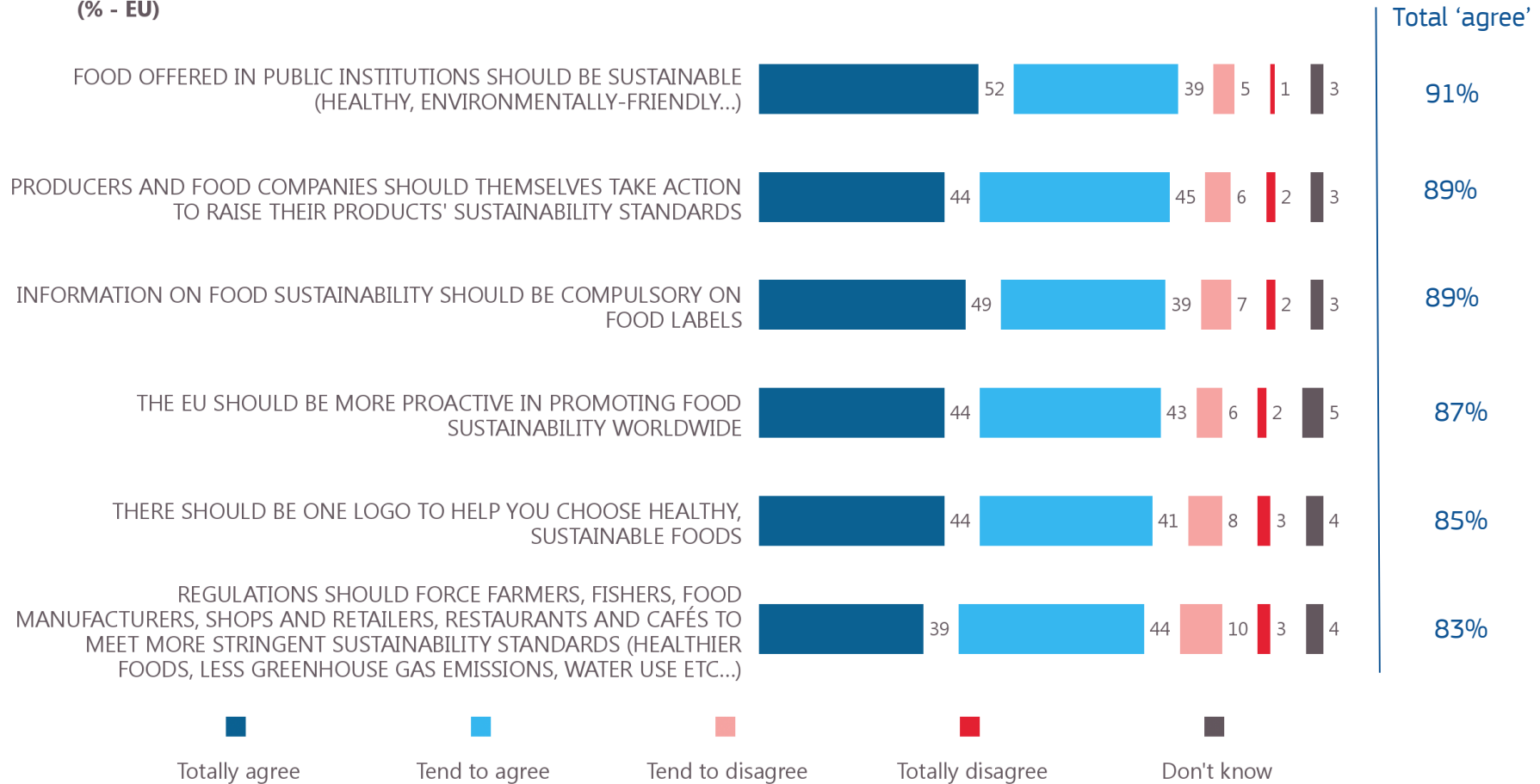


**QB5** According to you, which actors from the list below have a role to play in making our food systems sustainable? (MULTIPLE ANSWERS POSSIBLE)  
 (% - EU)



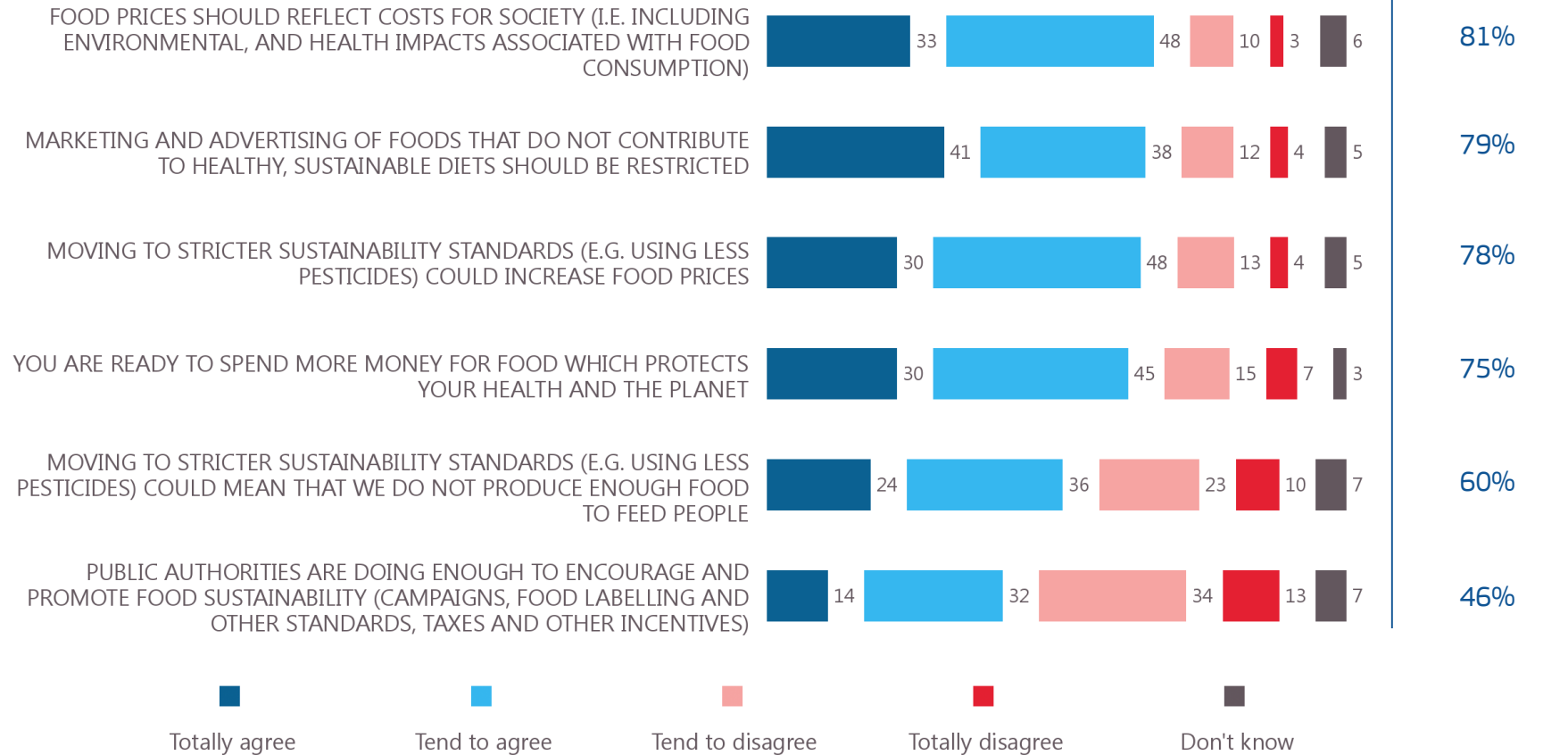
More educated and upper class consumers more likely to mention EU

**QB8** Please tell me to what extent do you agree or not with each of the following statement?  
(% - EU)





**QB8** Please tell me to what extent do you agree or not with each of the following statement?  
(% - EU)



# WHAT ARE THE MAIN BARRIERS TO SUSTAINABLE CHOICES?

---

Availability, cost and information

Availability is related to supply chains and product development, but also to information  
Information is a core barrier – sustainably produced and healthy products may be available, but if consumers do not know about it, there will be no sustainable and healthy choices

Information needs to be available and it needs to be trustworthy

Information also needs to be easily understood and easy to use

# AND WHO SHOULD DO SOMETHING ABOUT THIS?

---

Producers, manufacturers and authorities!

Consumers think the food value chain actors have the responsibility, should provide the right products and should make the right information available

On that basis, consumers may act – if they want to

# OVERALL CONCLUSIONS

---

Consumers can relate to the topic of food and sustainability

Sustainable food consumption is for many people related mainly to self-related benefits – a healthy and nutritious diet

Sustainability is regarded as important, but the classical food choice drivers – taste, cost, safety – still prevail

As long as people believe that there is a trade-off between sustainability and taste, cost and safety, sustainable choice will be limited

If the product supply bundles the major consumer benefits – safe and healthy food, good taste, reasonable cost, sustainable production – sustainable choices will increase

Information has a major role in enabling sustainable choices



**MAPP - RESEARCH ON VALUE CREATION IN THE  
FOOD SECTOR**

DEPARTMENT OF MANAGEMENT  
AARHUS UNIVERSITY