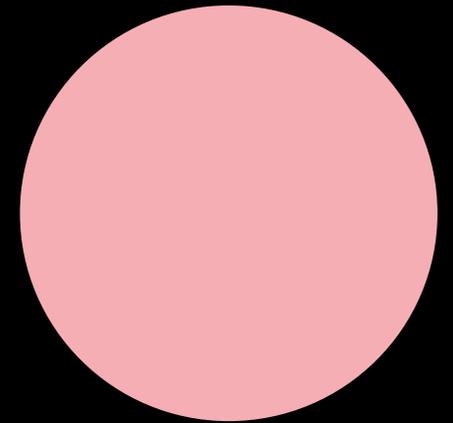

WWF Food Habits Survey 2022



WWF | FUNDAÇÃO VIDA SILVESTRE | ESTONIAN FUND FOR NATURE | ANP ASSOCIAÇÃO NATUREZA PORTUGAL | AIESEC | CO-FUNDED BY THE EUROPEAN UNION

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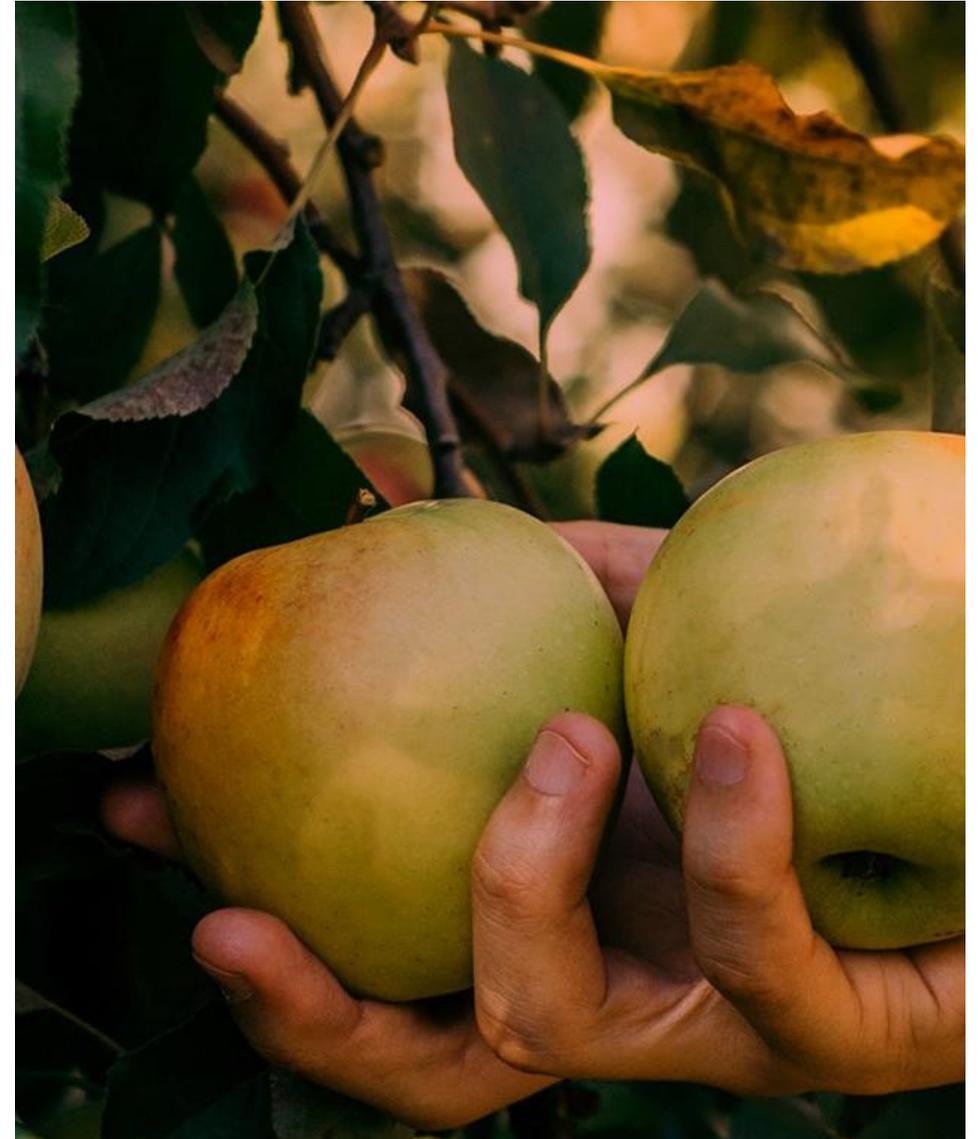
Background and objectives

WWF commissioned a survey of adults in 12 EU countries (Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain, Poland and Romania) plus the UK and Mexico, as part of the second wave of the Eat4Change project, with funding from the European Union, WWF-DE and WWF-Int.

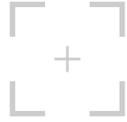
Eat4Change aims to engage citizens on the topic of sustainable food, highlighting global interconnections and dependencies and demonstrating how individual lifestyle choices can directly contribute to limiting climate warming.

Q1-Q11 in the Wave 2 survey were kept the same as in the Wave 1 survey, to ensure comparability. Q12-Q19 are questions unique to the Wave 2 survey.

In addition, Germany, Spain, Poland, Romania and Mexico were only surveyed in Wave 2. As such comparisons between Wave 1 and Wave 2 are made between Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, and the UK only. In the remainder of the report, these are referred to as the 'tracked countries'.



Methodology



Sample

Country	Wave One Base	Wave Two Base
Total	11,439	19,922
Austria	1032	1004
Belgium	1028	1000
Estonia	1044	1013
Finland	1031	1007
France	2098	2017
Greece	1017	1048
Portugal	1052	1097
Sweden	1074	1014
United Kingdom	2063	2015
Germany	n/a	2044
Spain	n/a	2009
Poland	n/a	2008
Romania	n/a	1073
Mexico	n/a	1573



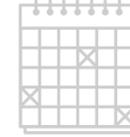
Method

An online panel

Data were weighted per country by age, gender and region to be nationally representative by county.

All countries were weighted to be equally represented in the combined Wave 2 and Wave 1/Wave 2 tracked country totals

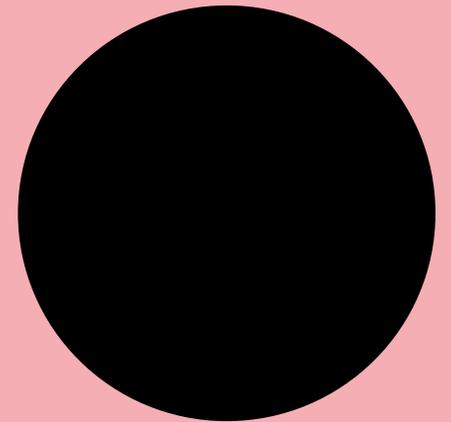
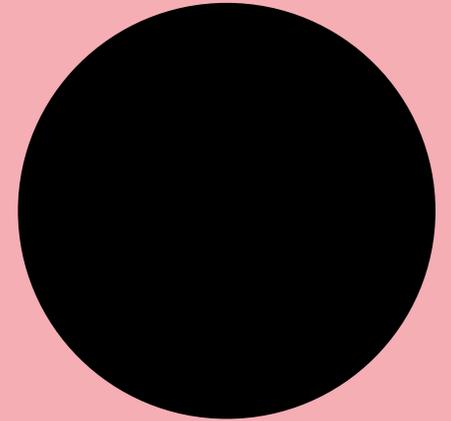
“Tracked countries” refers to those countries surveyed in both wave 1 and wave 2 of the survey.



Fieldwork dates

21st June to 7th July 2022

Section One: The Role of Governments and the EU in Changing Food Habits

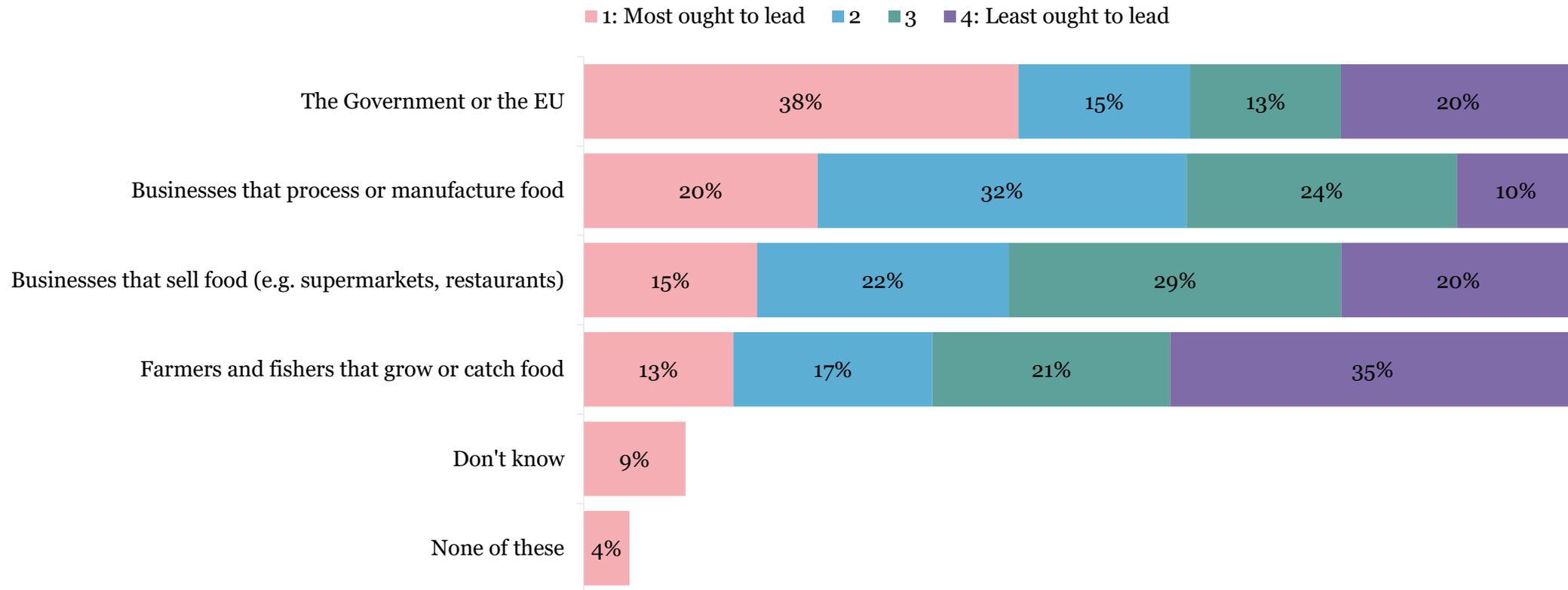


Executive Summary

- When asked which organisation should lead efforts that would help people make environmentally friendly food choices, a plurality (38%) of EU respondents pick their Governments, or the EU, as their first choice.
- When asked what actions Governments or the EU should take towards different types of organisation, between 35-36% of respondents (depending on the organisation) prefer that Governments or the EU employ a mixture of rules-making and financial support.
- The majority of remaining respondents prefer that Governments or the EU should either only provide financial support to, or only make new rules for, each organisation. Which approach is preferred varies according to organisation and country.
- In general, more Europeans prefer their Governments or the EU to provide only financial support to farmers, fishers, schools and public canteens, than prefer them to only make new rules for them.
- Opinion on the correct action for Government or the EU to take towards other businesses, such as food manufacturers/producers and supermarkets, restaurants and grocery shops, varies greatly by country. For example Estonia, Sweden and Finland prefer financial support, while France, Greece, Portugal, and Romania prefer rules-making.

Four in ten Europeans pick their Governments or the EU as their first choice for who should lead efforts that would help people make environmentally friendly food choices

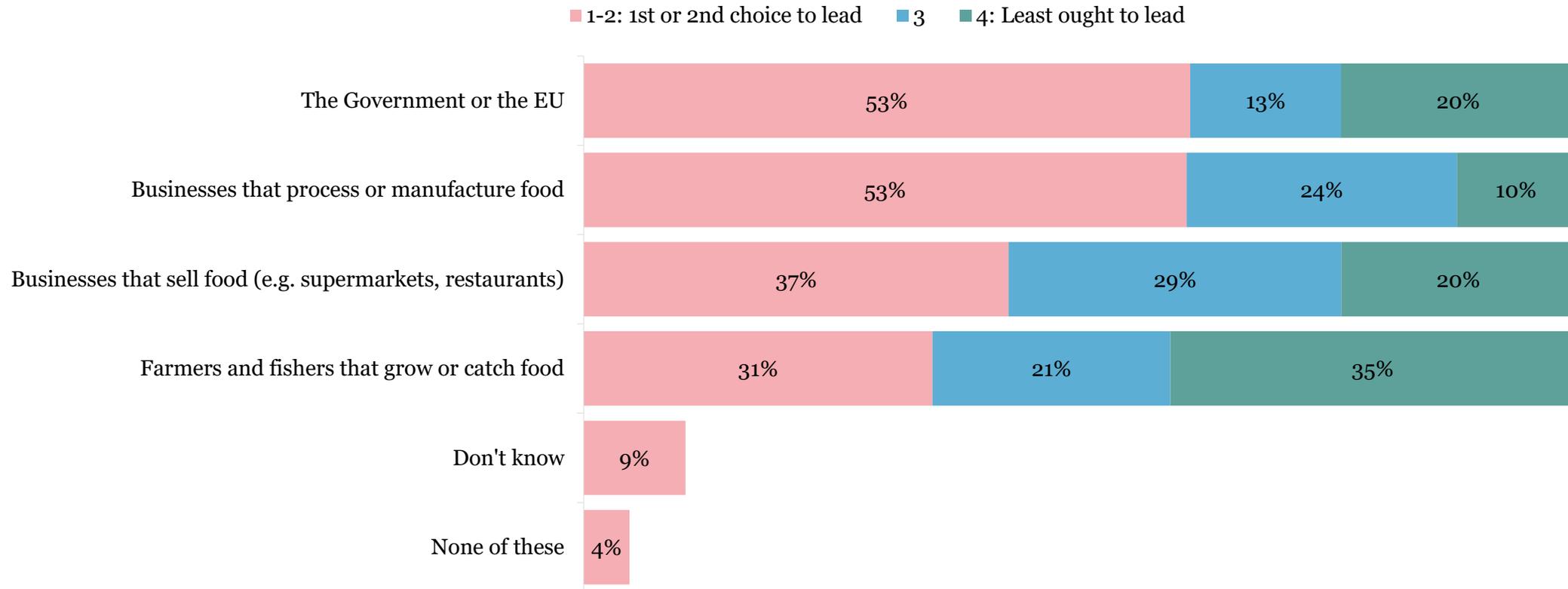
The proportion of EU respondents who believe each group ought to lead efforts to help people make environmentally friendly food choices, on a scale from most, to least, ought to lead



Q12: Who do you think should design and lead efforts that would help people make environmentally-friendly food choices?

Europeans are just as likely to pick businesses that process or manufacture food as they are the Government or EU as their 1st or 2nd choice for the group that should lead efforts to help people make environmentally friendly food choices

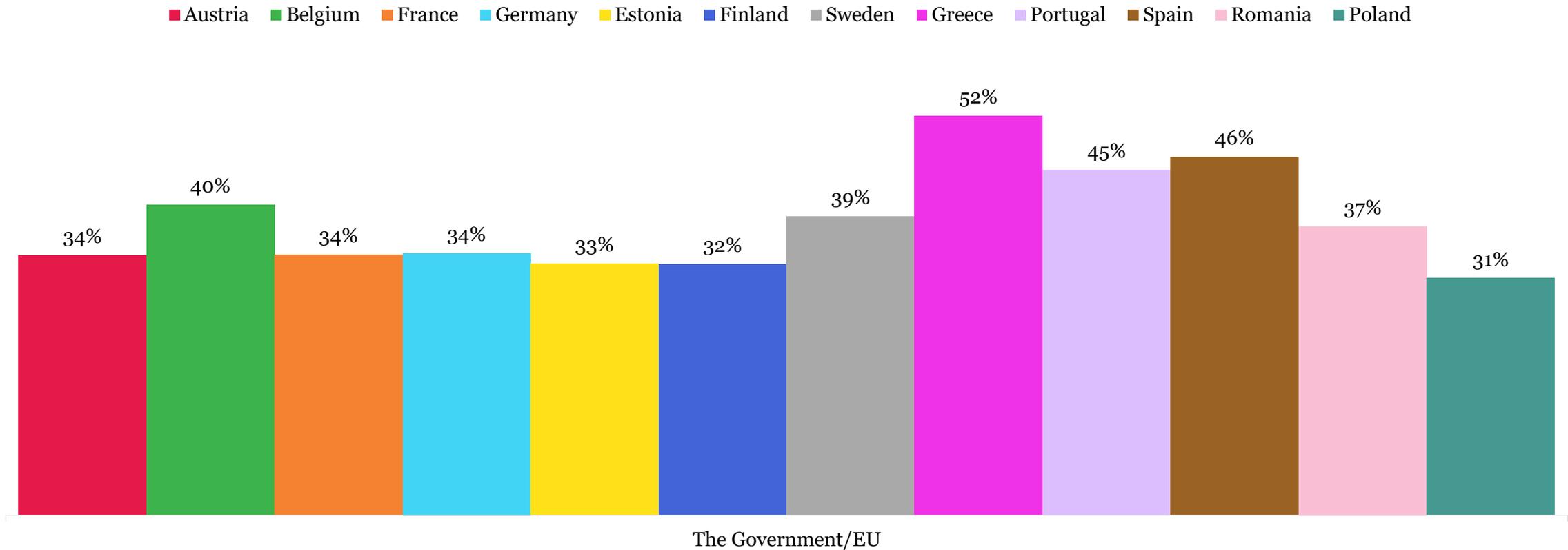
The proportion of EU respondents who believe each group ought to lead efforts to help people make environmentally friendly food choices, on a scale from most, to least, ought to lead



Q12: Who do you think should design and lead efforts that would help people make environmentally-friendly food choices?

Greeks are most likely, and Poles least likely, to select their Governments, or the EU, as the group that most ought to lead efforts to help people make environmentally friendly food choices

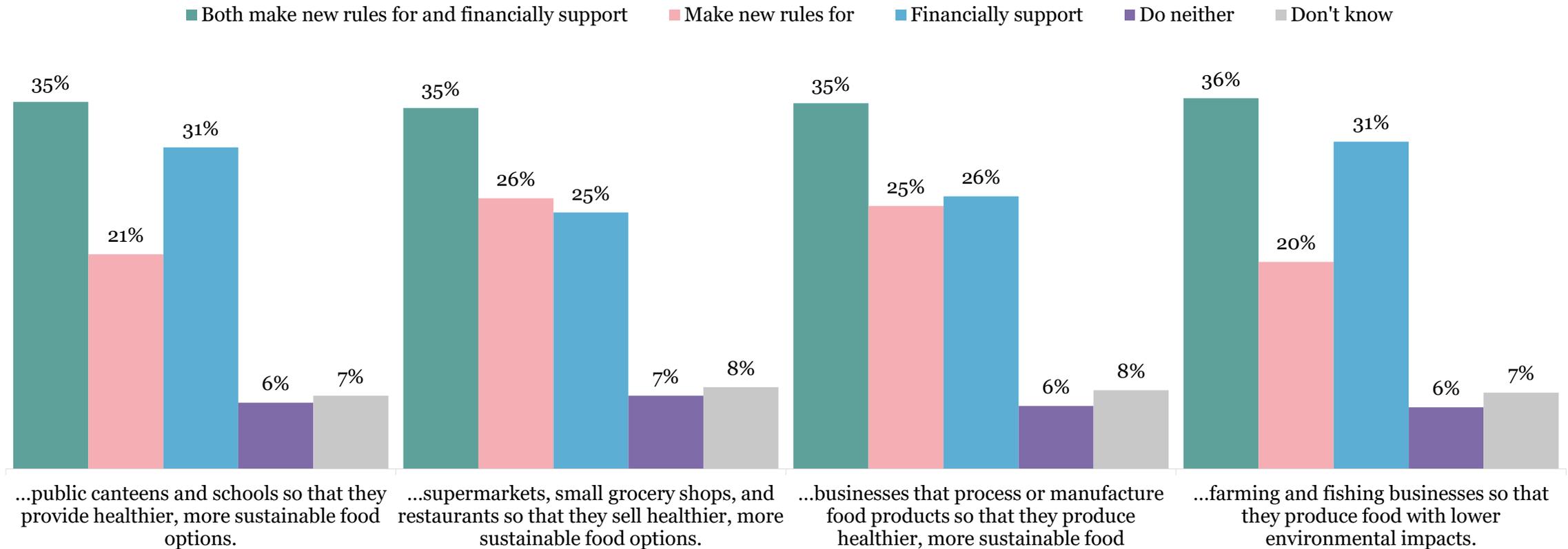
The proportion of respondents in each country who think their Government or the EU most ought to design and lead efforts to help people make environmentally-friendly food choices



Q12. The Government/EU: Who do you think should design and lead efforts that would help people make environmentally-friendly food choices?

A third of Europeans prefer that action taken towards the following groups involve both making new rules for them to follow, and financial support.

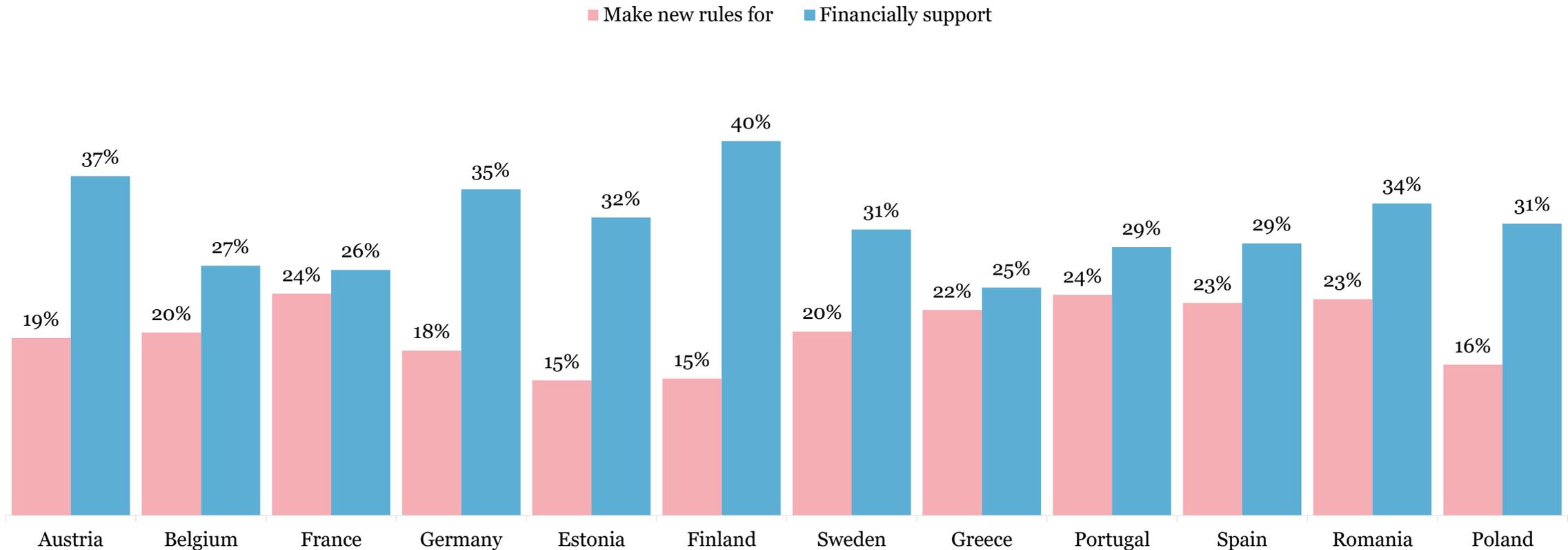
The proportion of EU respondents who prefer that Government/EU action taken towards the following groups, to help consumers make more environmentally friendly food choices, involves making new rules, financial support, both, or neither



Q13: Which of the following actions if any, should the Government/EU take towards the following groups, to help you make more environmentally-friendly food choices?

More Europeans across every country prefer providing financial support alone to farmers or fishers, to only making new rules for them to follow

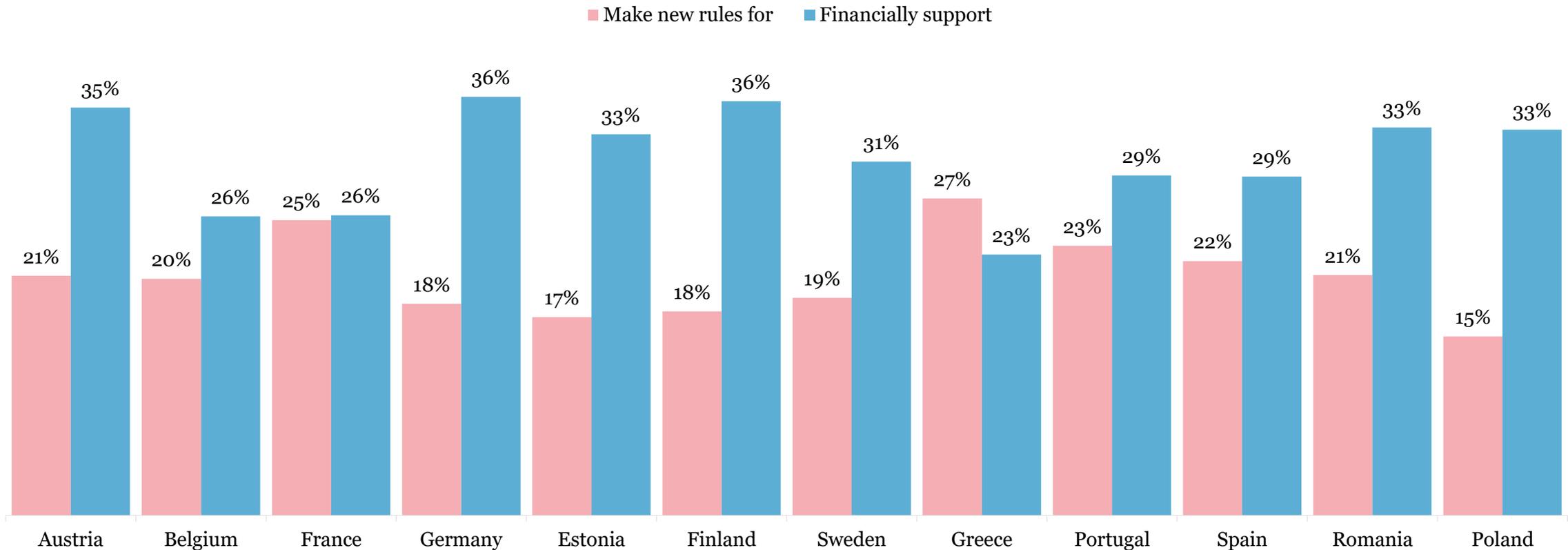
The proportion of respondents in each country who prefer that Government/EU action taken towards **farming and fishing businesses** involve either only making new rules for them, or only financially supporting them



11 Q13. ...farming and fishing businesses so that they produce food with lower environmental impacts. Which of the following actions if any, should the Government/EU take towards the following groups, to help you make more environmentally-friendly food choices?
Base: Those aged 18-65 who live in Austria (1004), Belgium (1000), Estonia (1013), Finland (1007), France (2017), Greece (1048), Portugal (1097), Sweden (1014), Germany (2044), Spain (2009), Poland (2008), Romania (1073), 2022

More people in most countries prefer providing only financial support to public canteens and schools, over only making new rules, though Greece is a clear exception

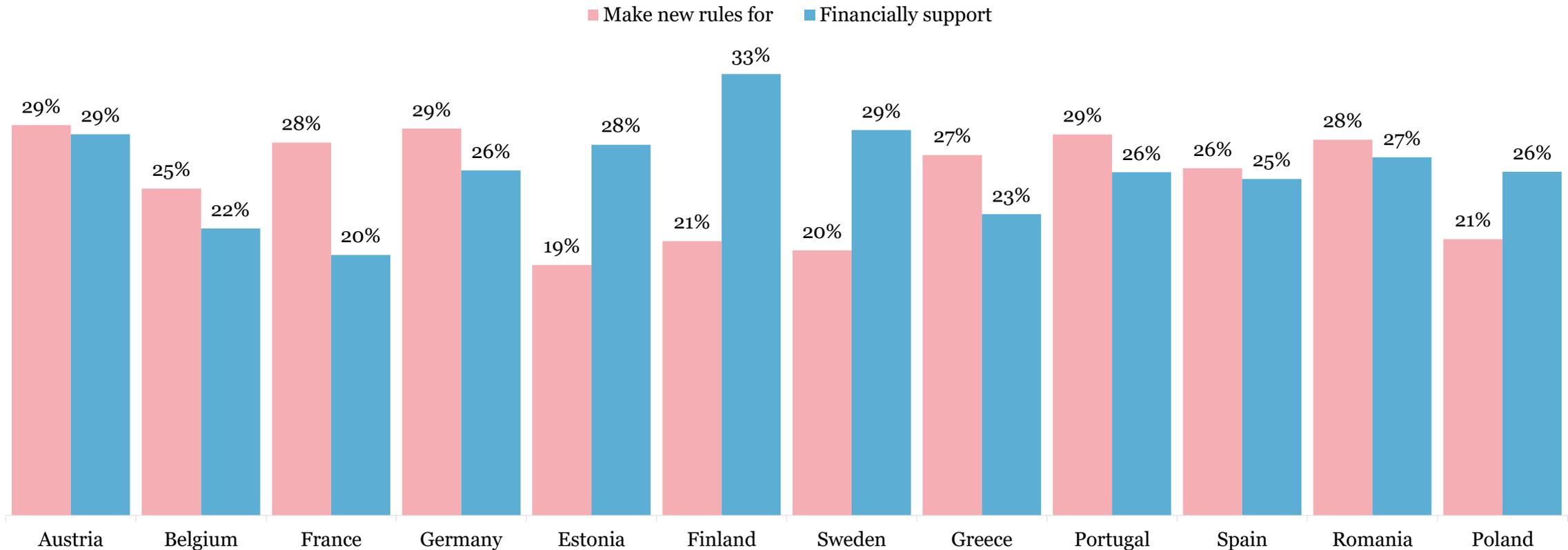
The proportion of respondents in each country who prefer that Government/EU action taken towards **public canteens and schools** involve either only making new rules for them, or only financially supporting them



12 Q13. ...public canteens and schools so that they provide healthier, more sustainable food options. Which of the following actions if any, should the Government/EU take towards the following groups, to help you make more environmentally-friendly food choices?
Base: Those aged 18-65 who live in Austria (1004), Belgium (1000), Estonia (1013), Finland (1007), France (2017), Greece (1048), Portugal (1097), Sweden (1014), Germany (2044), Spain (2009), Poland (2008), Romania (1073), 2022

In Estonia, Finland, Sweden, and Poland more people think the Government or the EU should only provide financial support to food manufacturers or producers, than think the Government or EU should only make new rules for them

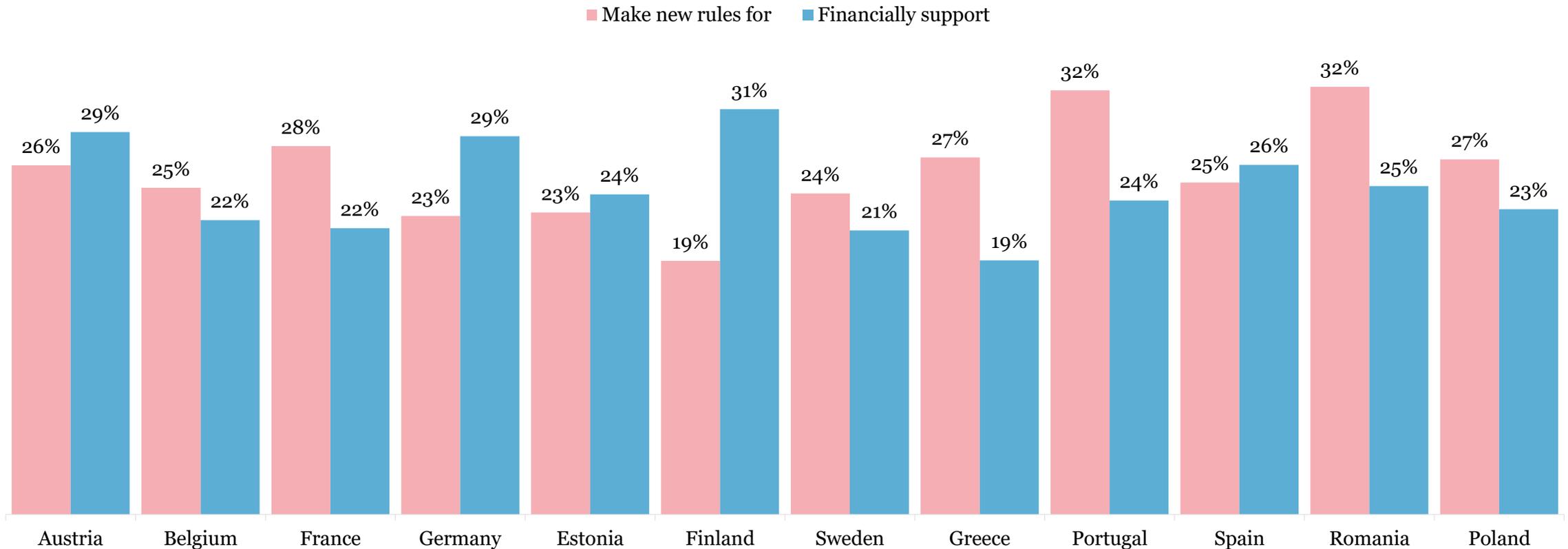
The proportion of respondents in each country who prefer that Government/EU action taken towards **food manufacturers or producers** involve either only making new rules for them, or only financially supporting them



13 Q13. ...businesses that process or manufacture food products so that they produce healthier, more sustainable food. Which of the following actions if any, should the Government/EU take towards the following groups, to help you make more environmentally-friendly food choices?
 Base: Those aged 18-65 who live in Austria (1004), Belgium (1000), Estonia (1013), Finland (1007), France (2017), Greece (1048), Portugal (1097), Sweden (1014), Germany (2044), Spain (2009), Poland (2008), Romania (1073), 2022

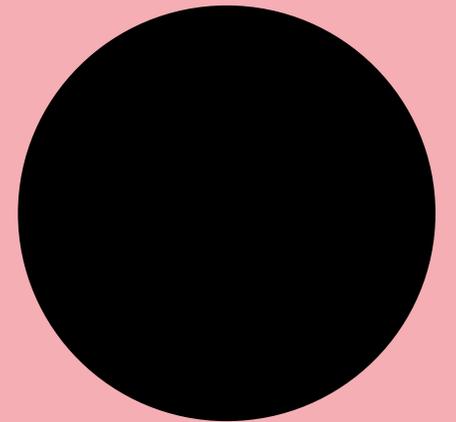
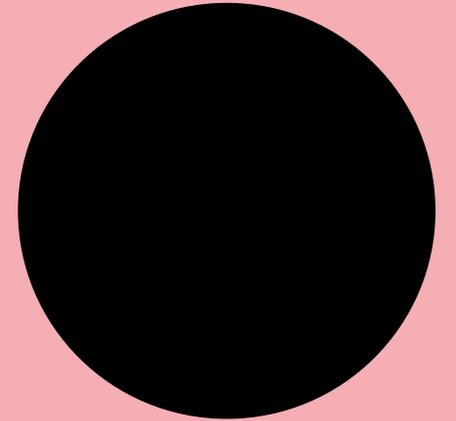
The Portuguese and Romanians are most in favour of only making new rules for supermarkets, grocery stores, and restaurants, whereas Finns are most in favour of only providing financial support

The proportion of respondents in each country who prefer that Government/EU action taken towards **supermarkets, grocery shops, and restaurants** involve either only making new rules for them, or only financially supporting them



14 Q13: Supermarkets, small grocery shops, and restaurants so that they sell healthier, more sustainable food options. Which of the following actions if any, should the Government/EU take towards the following groups, to help you make more environmentally-friendly food choices?
 Base: Those aged 18-65 who live in Austria (1004), Belgium (1000), Estonia (1013), Finland (1007), France (2017), Greece (1048), Portugal (1097), Sweden (1014), Germany (2044), Spain (2009), Poland (2008), Romania (1073), 2022

Section Two: Support for Policies to Change Food Habits



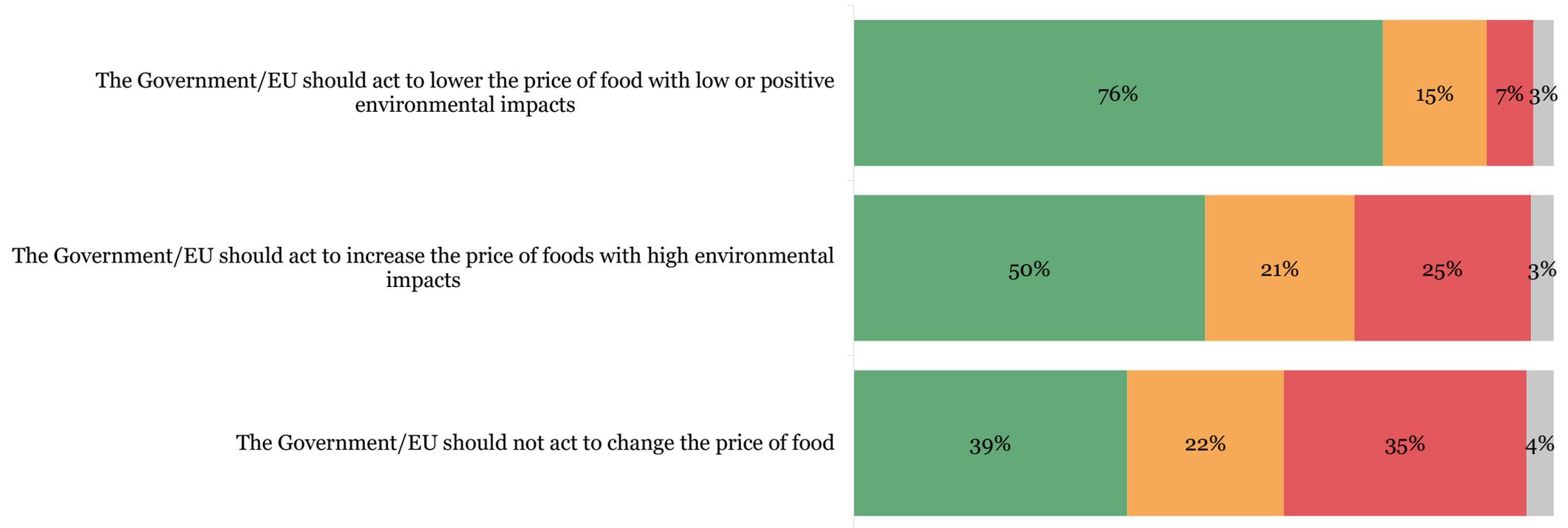
Executive Summary

- A majority of respondents in EU countries agree with supportive policies, such as reducing prices of sustainable food (76%) or informing consumers of the environmental impact of food products (71%).
- However, fewer respondents agree with more restrictive policies, such as increasing the price of non-sustainable food (49%), or making adverts for non-sustainable food illegal (36%).
- When asked what the Government or the EU should do to help prevent food shortages, respondents continue to display a preference for supportive policies (e.g. encouraging EU people to buy local (76%)) over more restrictive ones (e.g. acting to reduce the use of cropland for animal feed production (46%)).
- In the specific context of importing food into the EU however, there appears to be more support for restrictive policy. A majority of respondents preferred applying EU-level environmental standards to all countries (62%), not just rich ones (17%).

A majority of Europeans agree that their Government or the EU should lower the price of food with low or positive environmental impacts

The proportion of EU respondents who agree/disagree with the following statements

■ Agree ■ Neither agree nor disagree ■ Disagree ■ Don't know

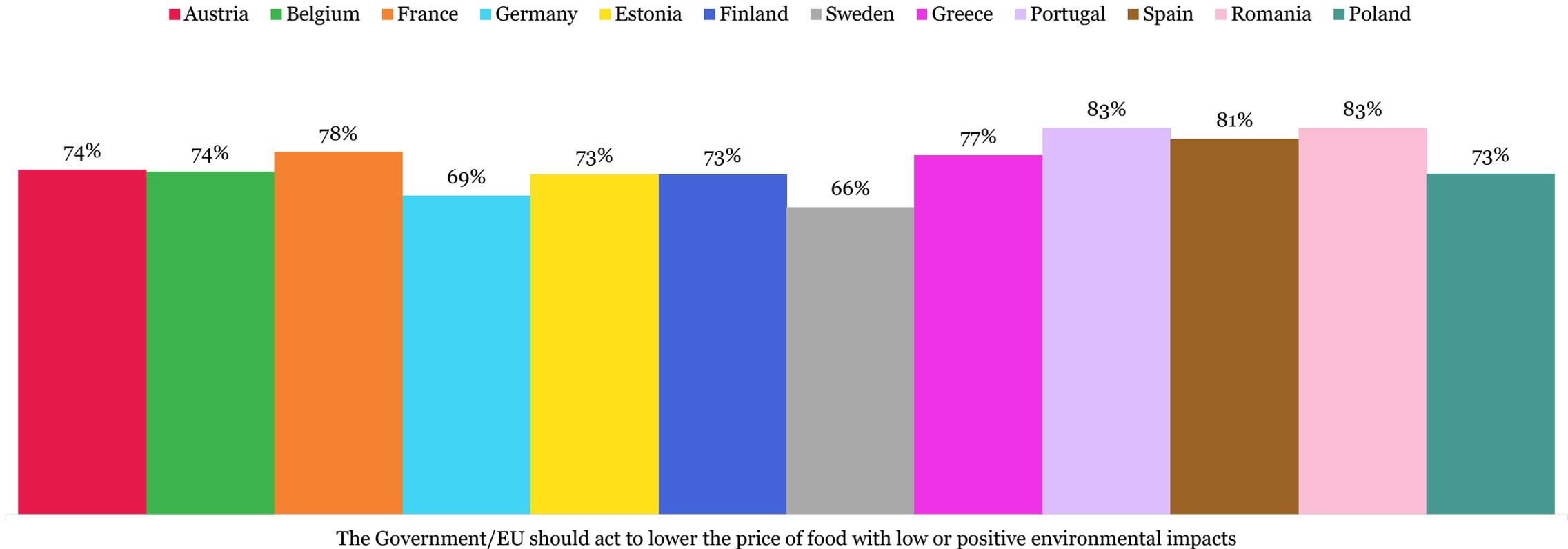


Q14. To what extent, if at all, do you agree or disagree with the following statements?

17 Base: Those aged 18-65 who live in 12 EU countries, 2022 (16,334)

On the country level, reducing the price of food with low or positive environmental impacts is most popular among Portuguese and Romanians, and least popular amongst Swedes and Germans

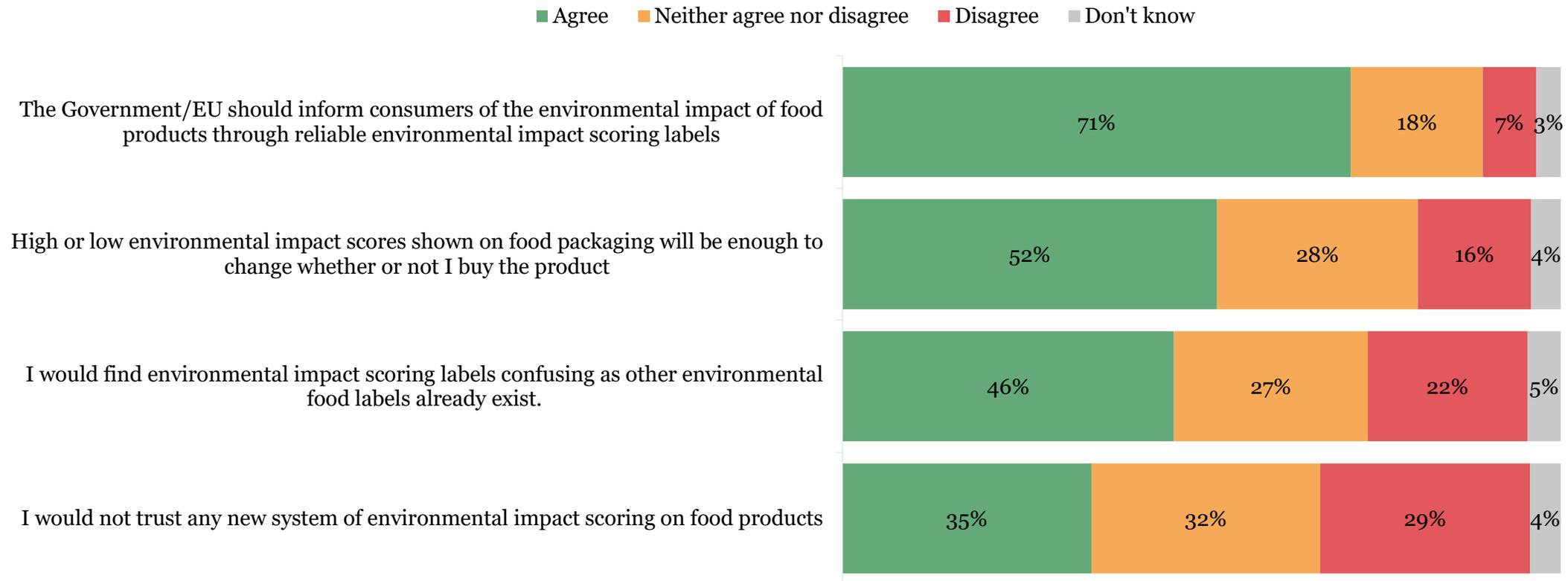
The proportion of respondents in each country who agree that the Government or EU should act to lower the price of food with low or positive environmental impacts



Q14. The Government or EU should act to lower the price of food with low or positive environmental impacts. To what extent, if at all, do you agree or disagree with the following statements?

A majority of Europeans agree that the Government/EU should ensure food bears environmental impact scoring labels, and that these labels would change their own behaviour

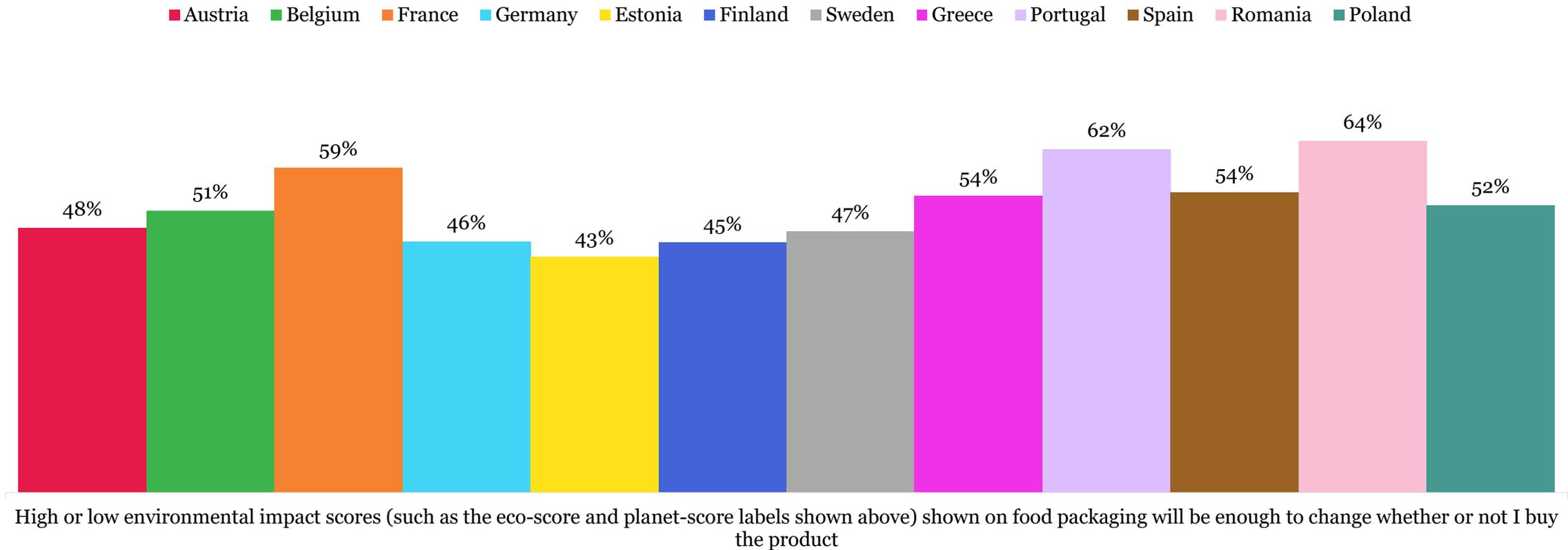
The proportion of EU respondents who agree/disagree with the following statements



Q14. To what extent, if at all, do you agree or disagree with the following statements?

Six in ten French, Portuguese and Romanians agree that environmental impact scores on food labels will be enough to change their behaviour

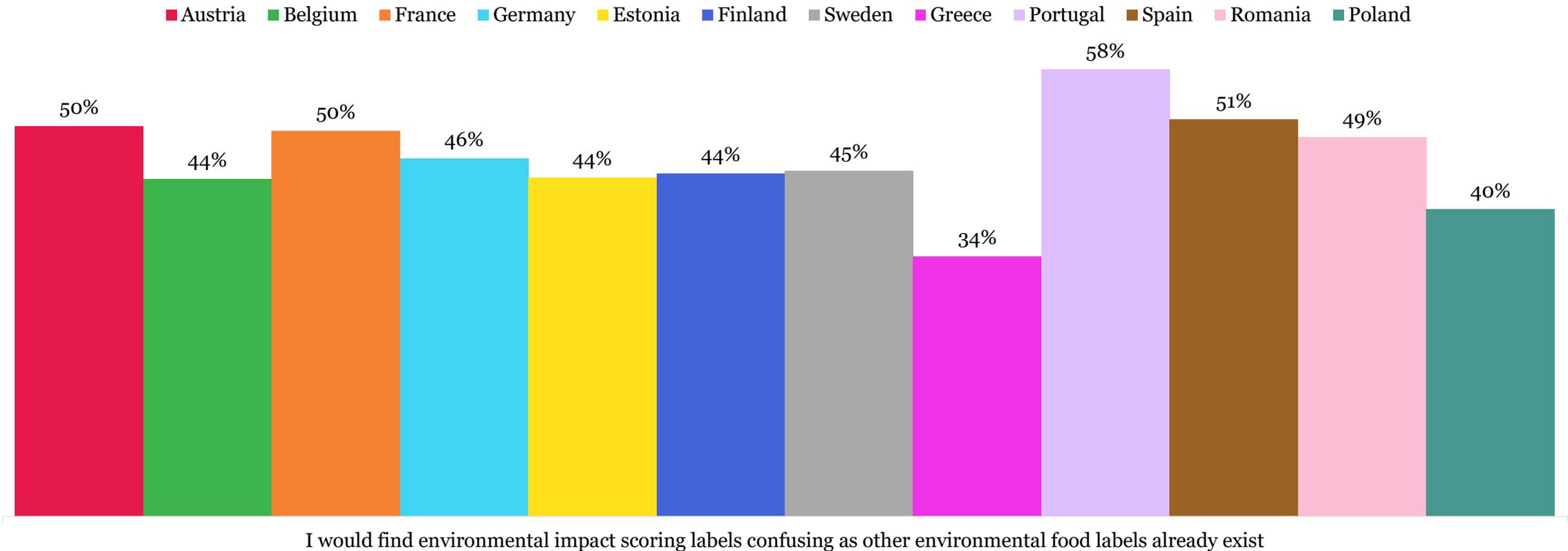
The proportion of respondents in each country who agree that environmental impact scores will be enough to change their behaviour



20 Q14. High or low environmental impact scores (such as the eco-score and planet-score labels shown above) shown on food packaging will be enough to change whether or not I buy the product: To what extent, if at all, do you agree or disagree with the following statements?
Base: Those aged 18-65 who live in Austria (1004), Belgium (1000), Estonia (1013), Finland (1007), France (2017), Greece (1048), Portugal (1097), Sweden (1014), Germany (2044), Spain (2009), Poland (2008), Romania (1073), 2022

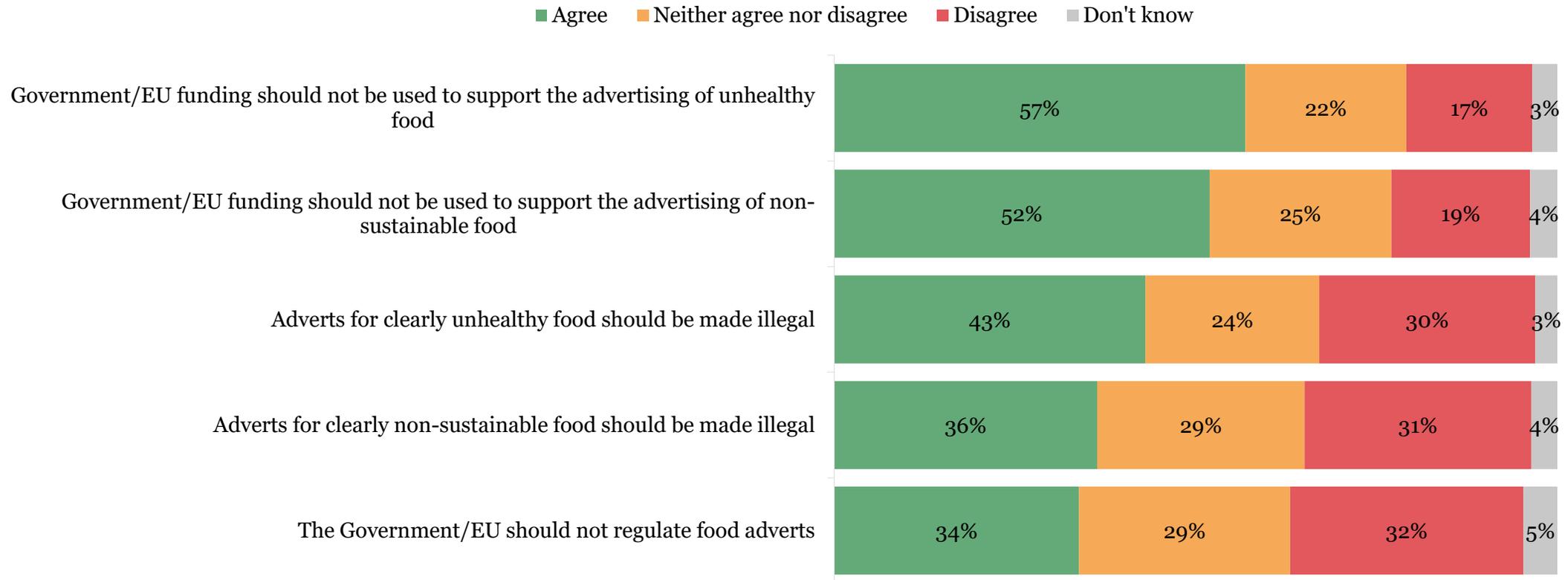
Almost six in ten Portuguese (nearly as many as perceive labels as being effective) and half of Austrians, French, Spanish and Romanians agree that they would find new environmental impact scoring labels confusing

The proportion of respondents in each country who agree that they would find new environmental impact scoring labels confusing



A majority of Europeans agree that EU/Government funding should not be used to support advertising for unhealthy/non-sustainable food, but only a plurality agree with making adverts for such food illegal

The proportion of EU respondents who agree/disagree with the following statements

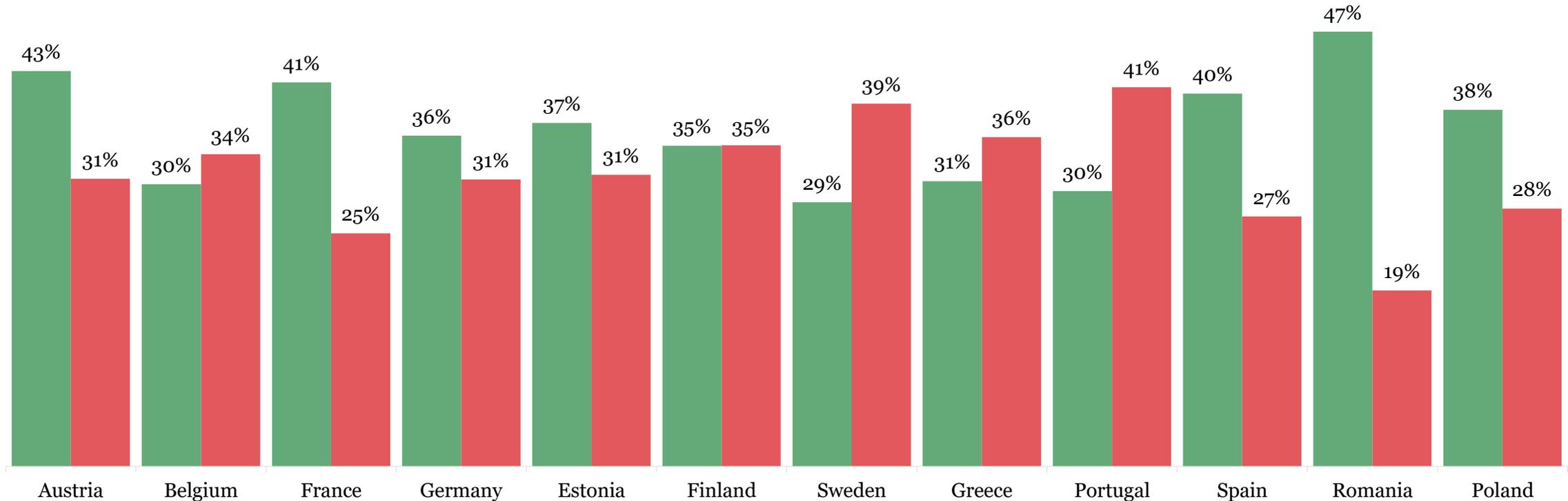


Q15. To what extent, if at all, do you agree or disagree with the following statements?

In Romania and France substantially more people support banning advertisements for clearly non-sustainable food than oppose it

The proportion of respondents in each country who agree/disagree that adverts for clearly non-sustainable food should be made illegal

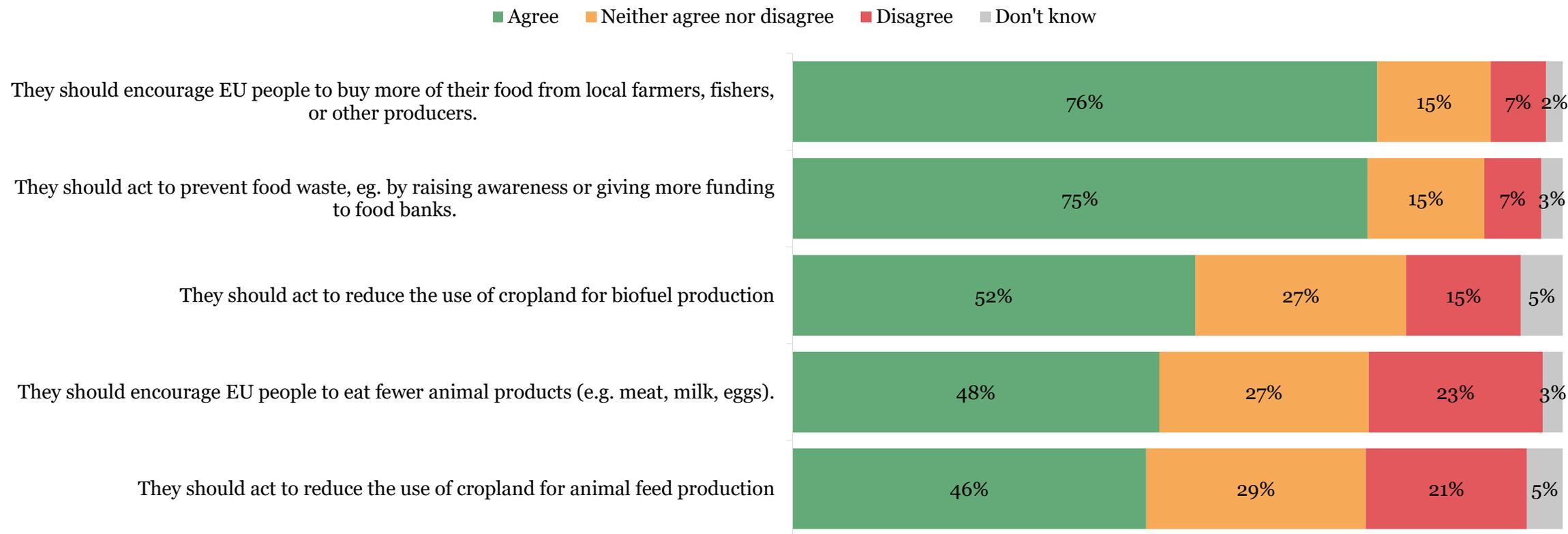
■ Agree ■ Disagree



Q15. Adverts for clearly non-sustainable food should be made illegal: To what extent, if at all, do you agree or disagree with the following statements?

A majority of Europeans agree that their Governments/the EU should encourage people to buy local and prevent food waste, to prevent food shortages

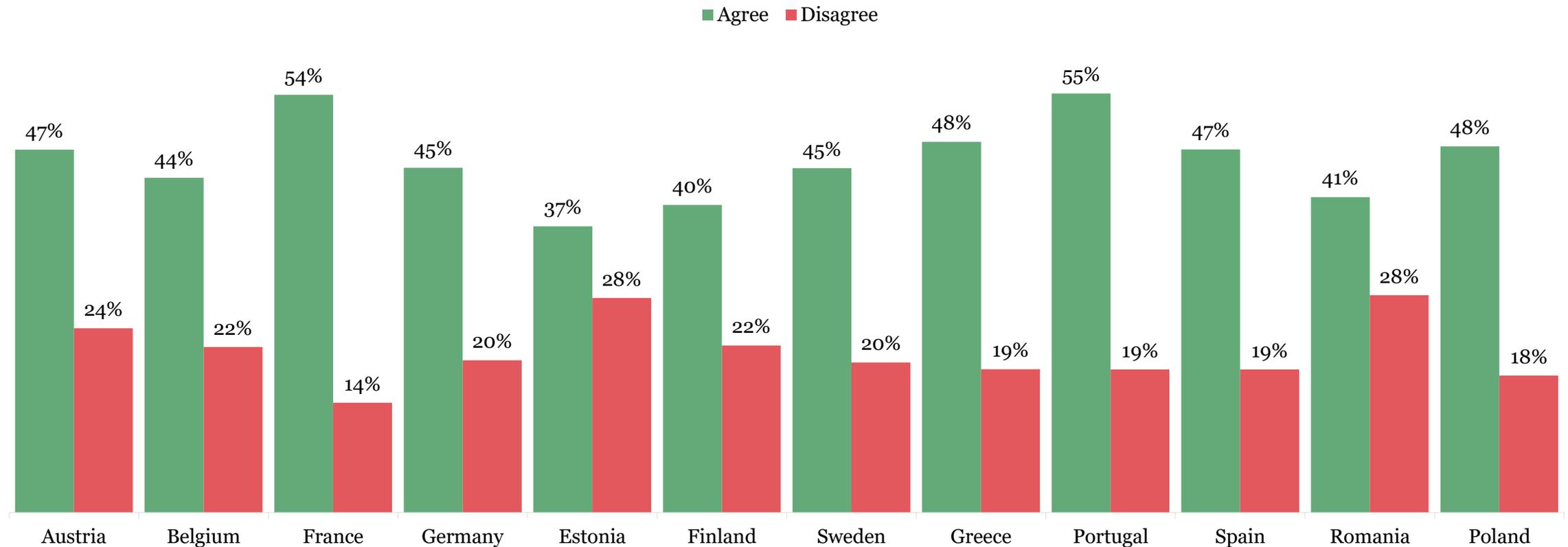
The proportion of EU respondents who agree/disagree that their Government or the EU should do the following to help prevent food shortages



Q16. To what extent do you agree or disagree that the Government or the EU should do the following, to help prevent food shortages?

More people across all countries agree than disagree that their Government/the EU should pursue even the least popular option proposed (reducing the amount of cropland used for animal feed production)

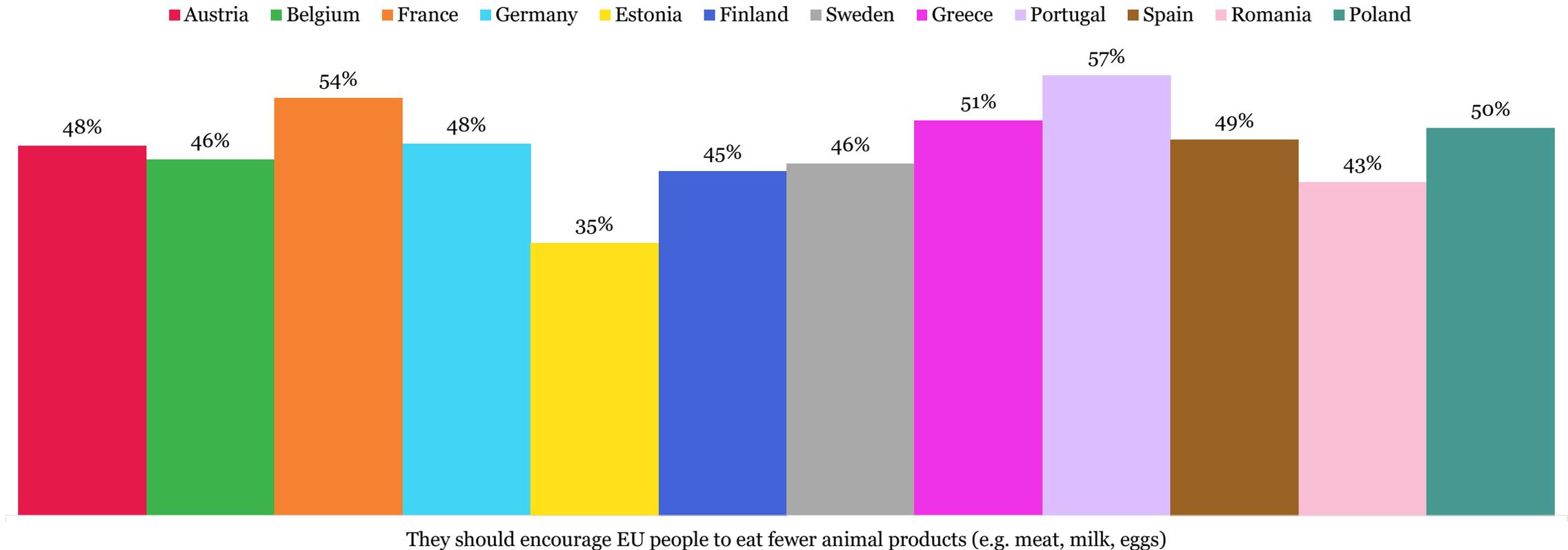
The proportion of respondents in each country who agree/disagree that their Government or the EU should act to reduce the use of cropland for animal feed production, to help prevent food shortages



Q16. They should act to reduce the use of cropland for animal feed production: To what extent do you agree or disagree that the Government/EU should do the following, to help prevent food shortages?

The French and Portuguese are most likely to agree that their Government or the EU should encourage EU people to eat fewer animal products to help prevent food shortages. Estonians are by far the least likely to agree

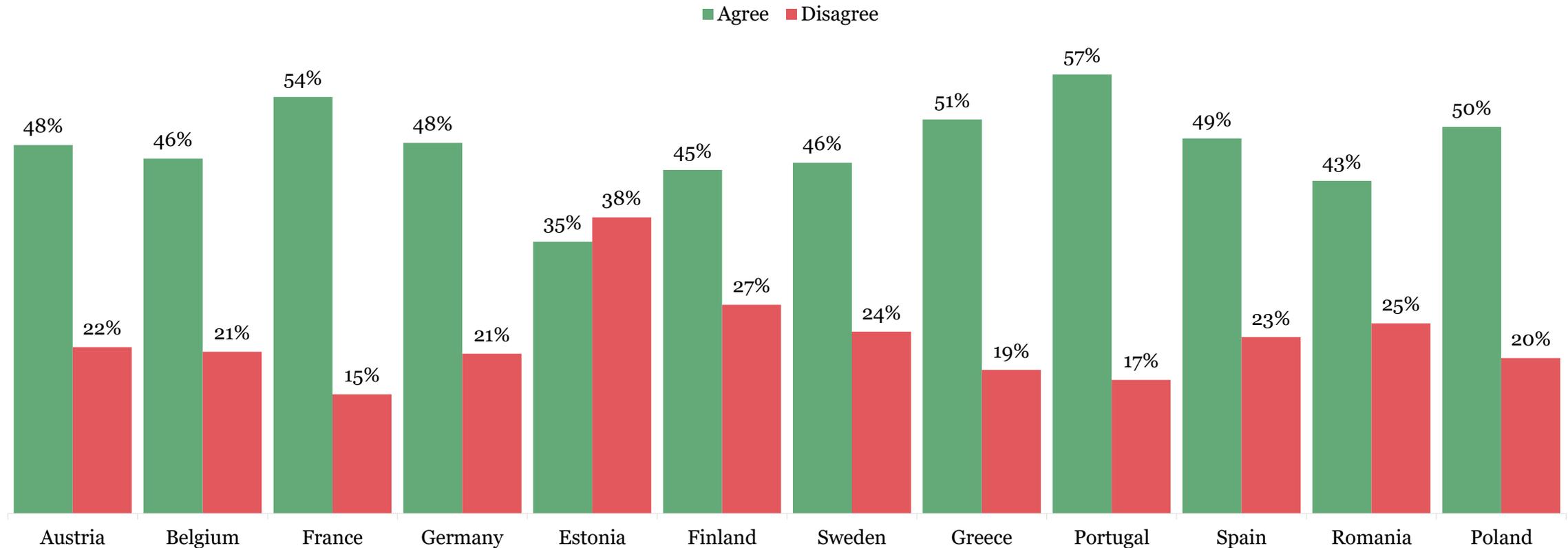
The proportion of respondents in each country who agree that their Government or the EU should encourage EU people to eat fewer animal products (e.g. meat, milk, eggs), to help prevent food shortages



Q16. They should encourage EU people to eat fewer animal products (e.g. meat, milk, eggs): To what extent do you agree or disagree that the Government/EU should do the following, to help prevent food shortages?

NEW The French and Portuguese are most likely to agree that their Government or the EU should encourage EU people to eat fewer animal products to help prevent food shortages. Estonians are by far the least likely to agree

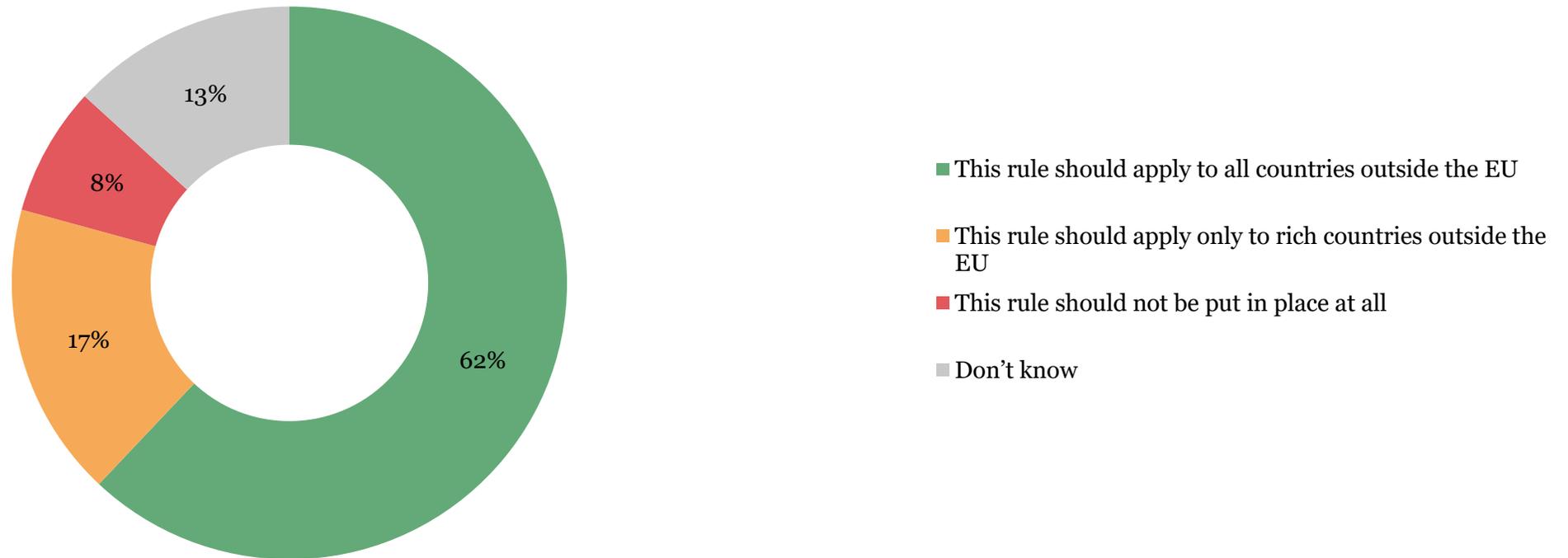
The proportion of respondents in each country who agree/disagree that their Government or the EU should act to reduce the use of cropland for animal feed production, to help prevent food shortages



Q16. They should encourage EU people to eat fewer animal products (e.g. meat, milk, eggs): To what extent do you agree or disagree that the Government/EU should do the following, to help prevent food shortages?

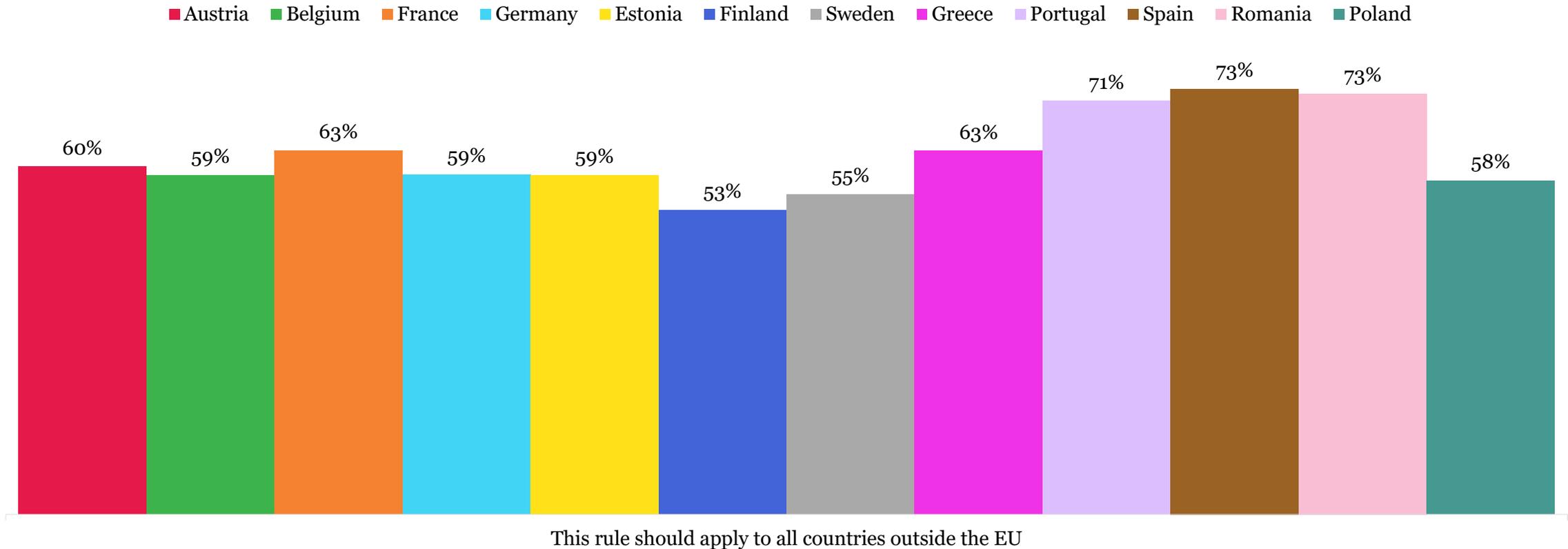
Six in ten believe that if the EU required food imported from outside the EU to meet the same, or higher, environmental standards as food produced within the Union, this rule should apply to all countries outside of the EU, regardless of how rich they are

The proportion of EU respondents who adopt the following positions towards a proposed EU rule, that would require food imported from outside the EU to meet the same, or higher environmental standards as food produced within the EU



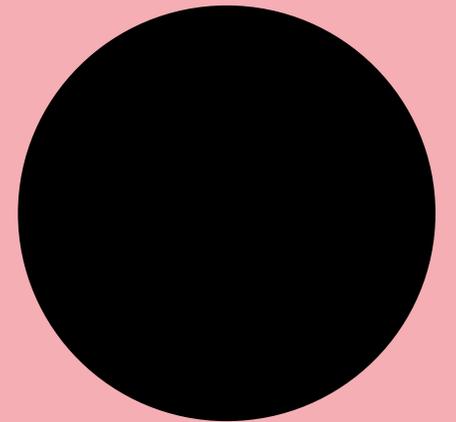
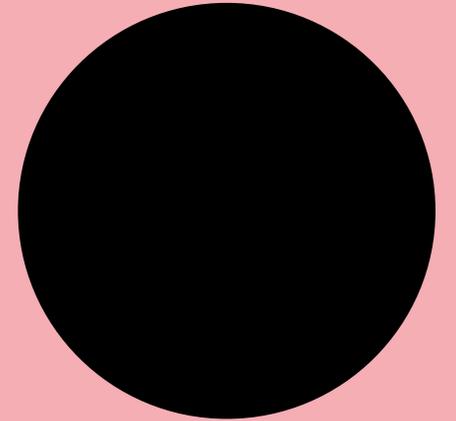
While majorities across all EU countries prefer that food imported from all countries outside the EU meet the same, or higher, environmental standards as food produced within the EU, support for this is strongest in Spain, Romania, and Portugal

The proportion of respondents in each country who believe that a proposed EU rule, that would require food imported from outside the EU to meet the same, or higher environmental standards as food produced within the EU, should apply to all countries outside the EU



29 Q17. The EU is considering creating a new rule, that would require food imported from outside the EU to meet the same, or higher, environmental standards as food produced within the EU. Thinking about this rule, which of the following statements comes closest to your view?
Base: Those aged 18-65 who live in Austria (1004), Belgium (1000), Estonia (1013), Finland (1007), France (2017), Greece (1048), Portugal (1097), Sweden (1014), Germany (2044), Spain (2009), Poland (2008), Romania (1073), 2022

Section Three: The Relative Importance of Sustainable Food for EU Citizens

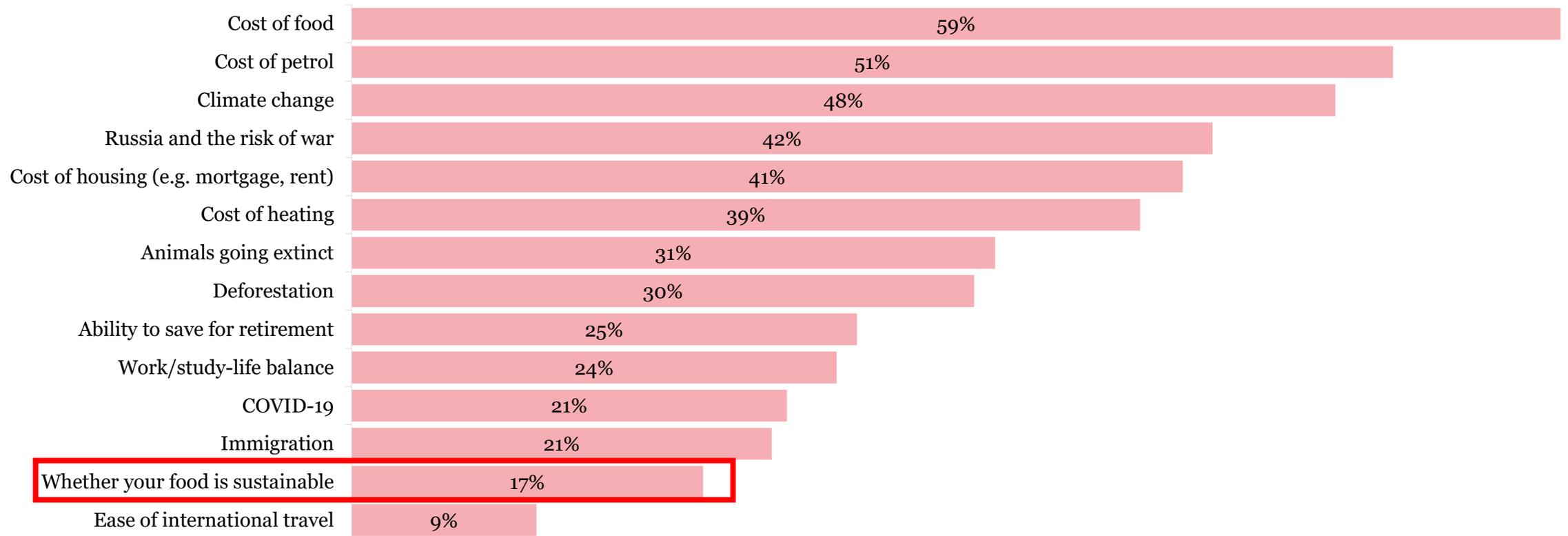


Executive Summary

- Less than one in five Europeans selected ‘whether your food is sustainable’ as one of the top five most important issues to them personally.
- Half of respondents said this issue had become more important to them over the last 12 months.
- However, even in the midst of a burgeoning cost of living crisis, almost half of respondents who live in the EU selected climate change as one of the top five most important issues to them personally (48%), with six in ten saying the issue had become more important to them over the last 12 months.
- As such, it is likely that sustainable food could become more important in future, if the issue was more closely associated with the urgency of climate change.
- Moreover, the increased importance of cost of food to Europeans may be related to the fact that the cost of sustainable food is a bigger barrier to people eating it in 2022 than it was in 2021.

Less than one in five Europeans selected food sustainability as one of their top five most important issues; however, even in a cost of living crisis, almost half selected climate change

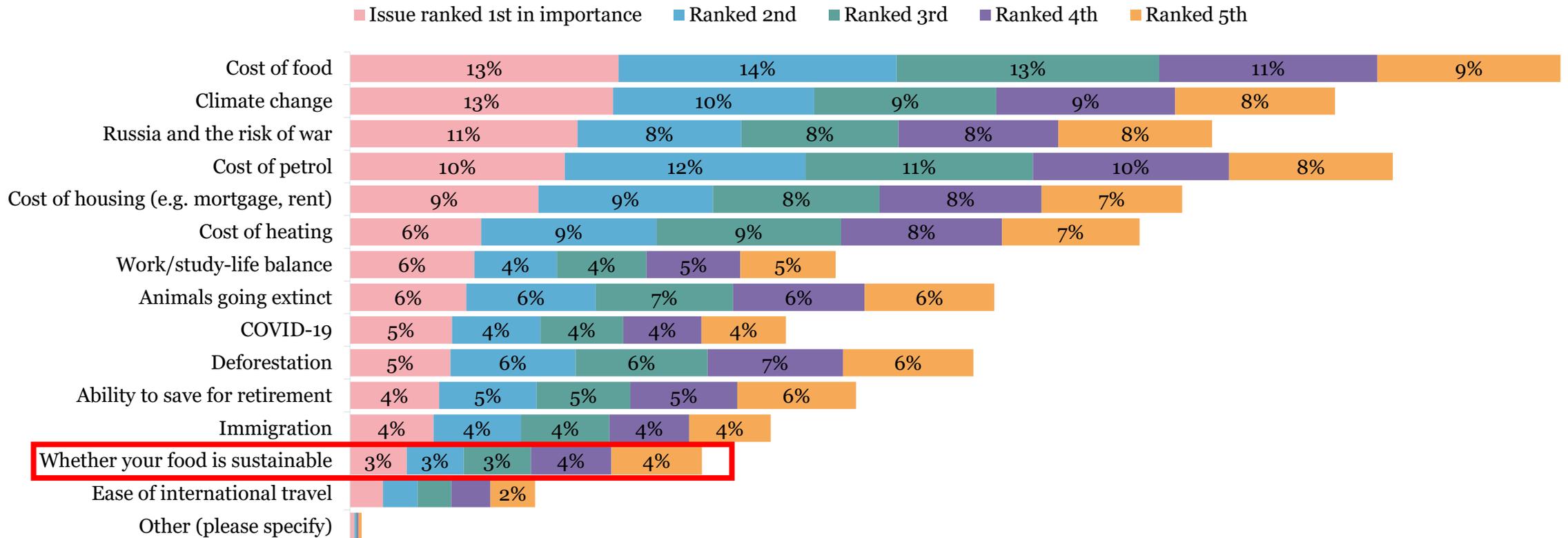
The proportion of EU respondents who selected each of the following issues as being one of the top five most important issues to them personally



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

And an equivalent proportion of Europeans selected climate change as the most important issue to them as did cost of food

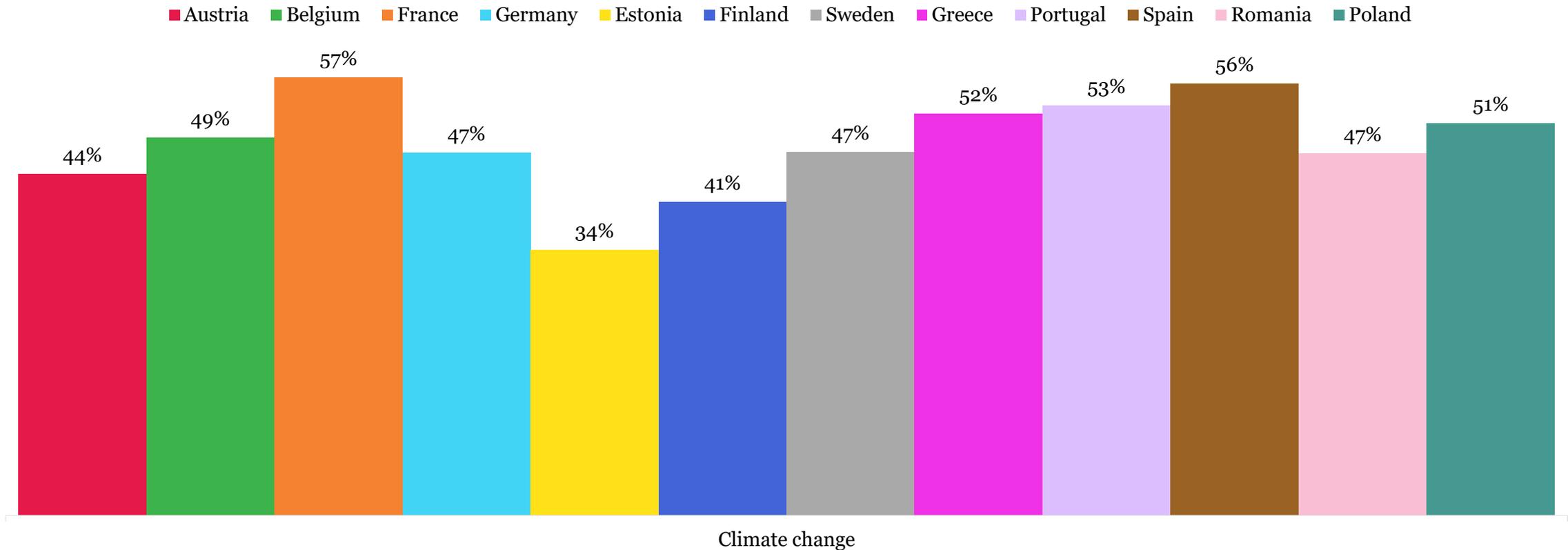
The proportion of EU respondents ranking each of the following options as the 1st, 2nd, 3rd etc. most important issue to them personally, out of five



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

The French and Spanish were most likely to select climate change as a top five most important issue, with Estonians being the least likely

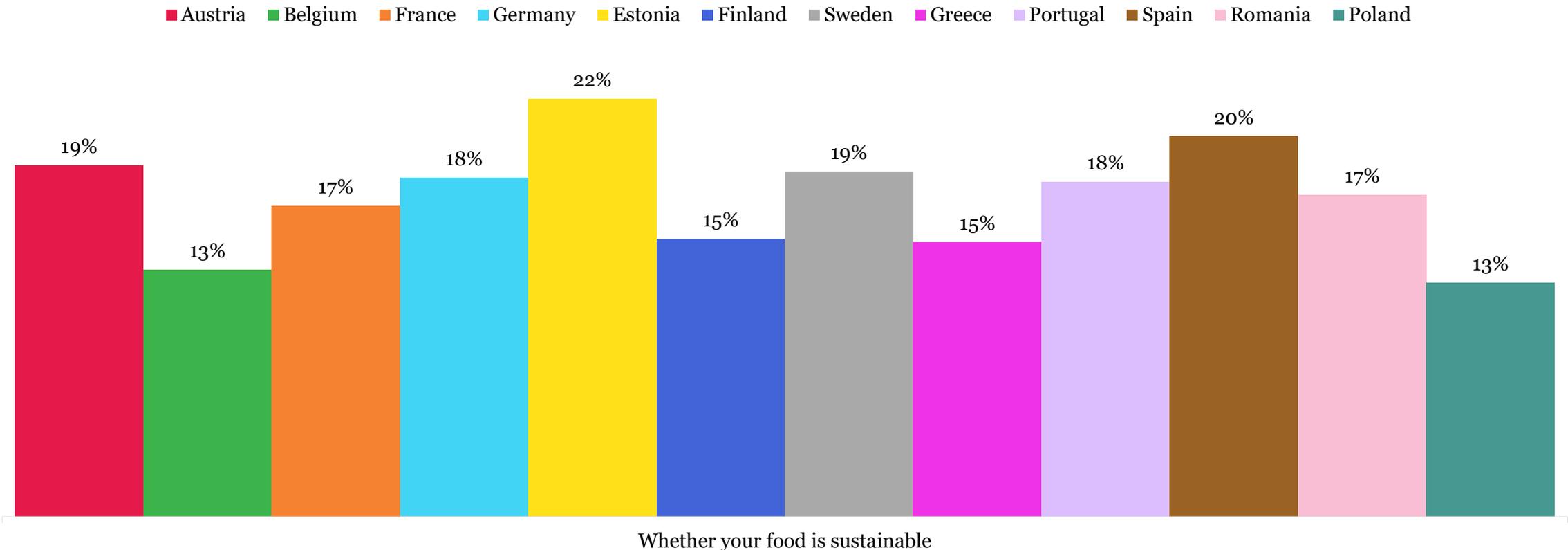
The proportion of respondents in each country who selected **climate change** as one of the top five most important issues to them personally



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

However, Estonians were also the Europeans most likely to select the sustainability of their food as one of their top five most important issues

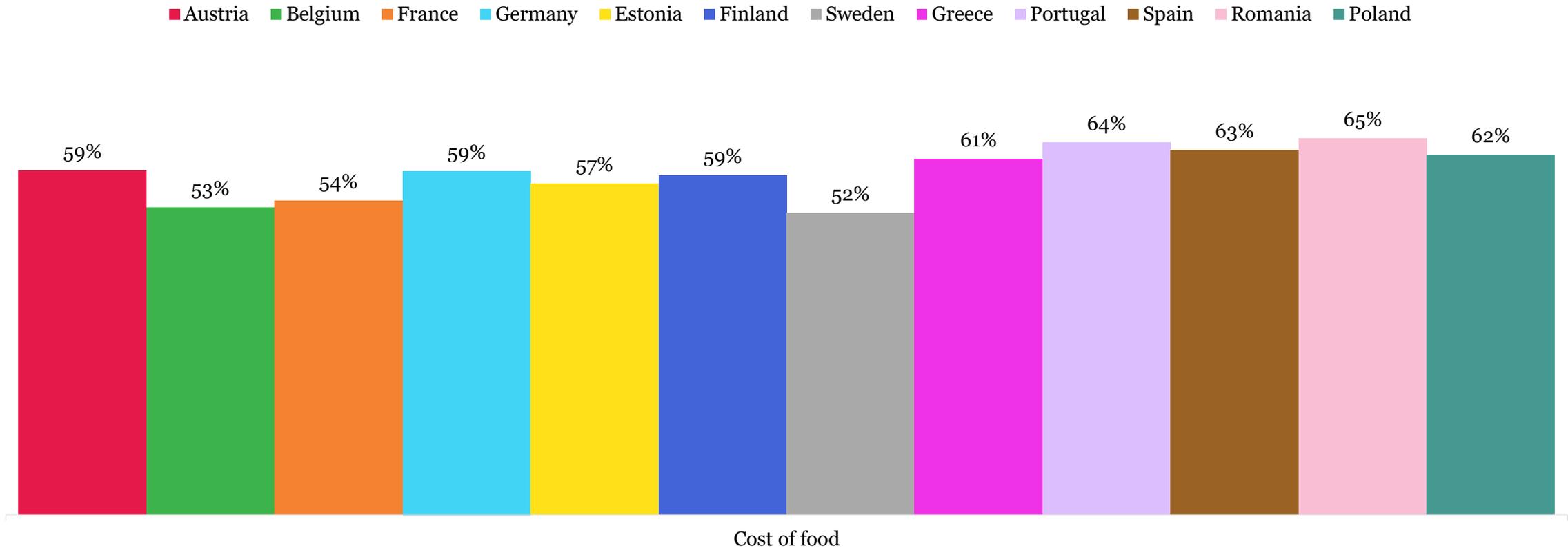
The proportion of respondents in each country who selected **food sustainability** as one of the top five most important issues to them personally



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

Romanians were most likely, and Swedes the least, to select the cost of food as one of the top five most important issues to them personally

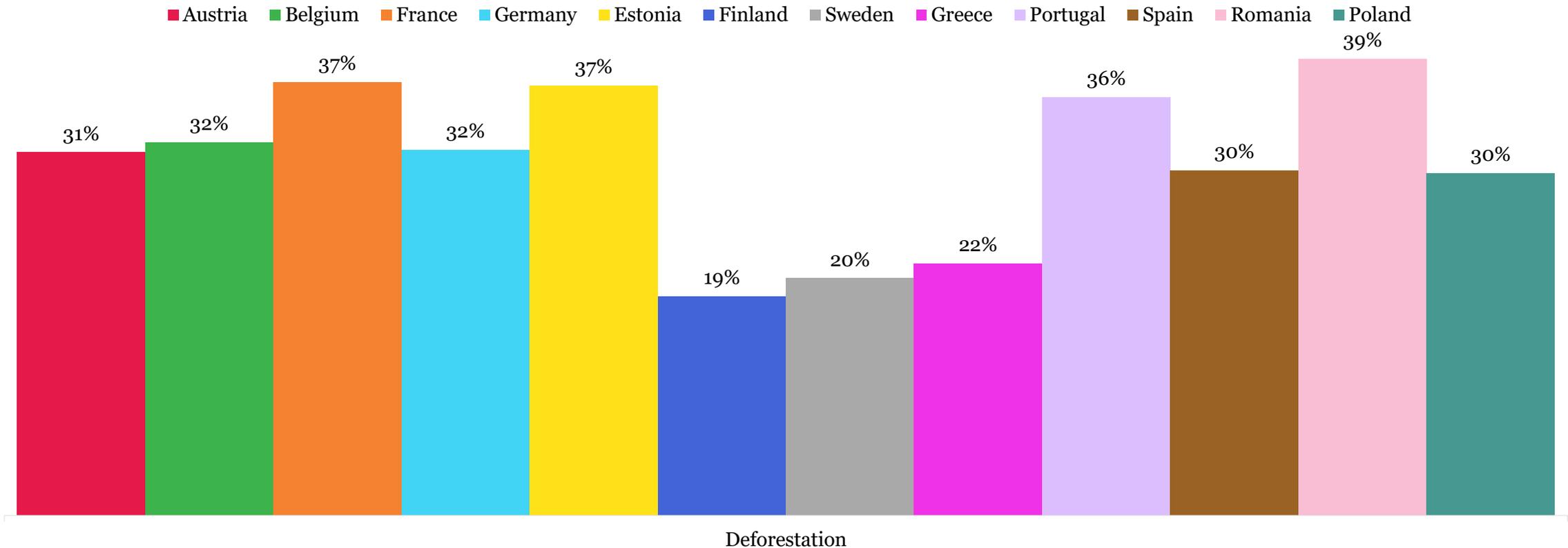
The proportion of respondents in each country who selected **cost of food** as one of the top five most important issues to them personally



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

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

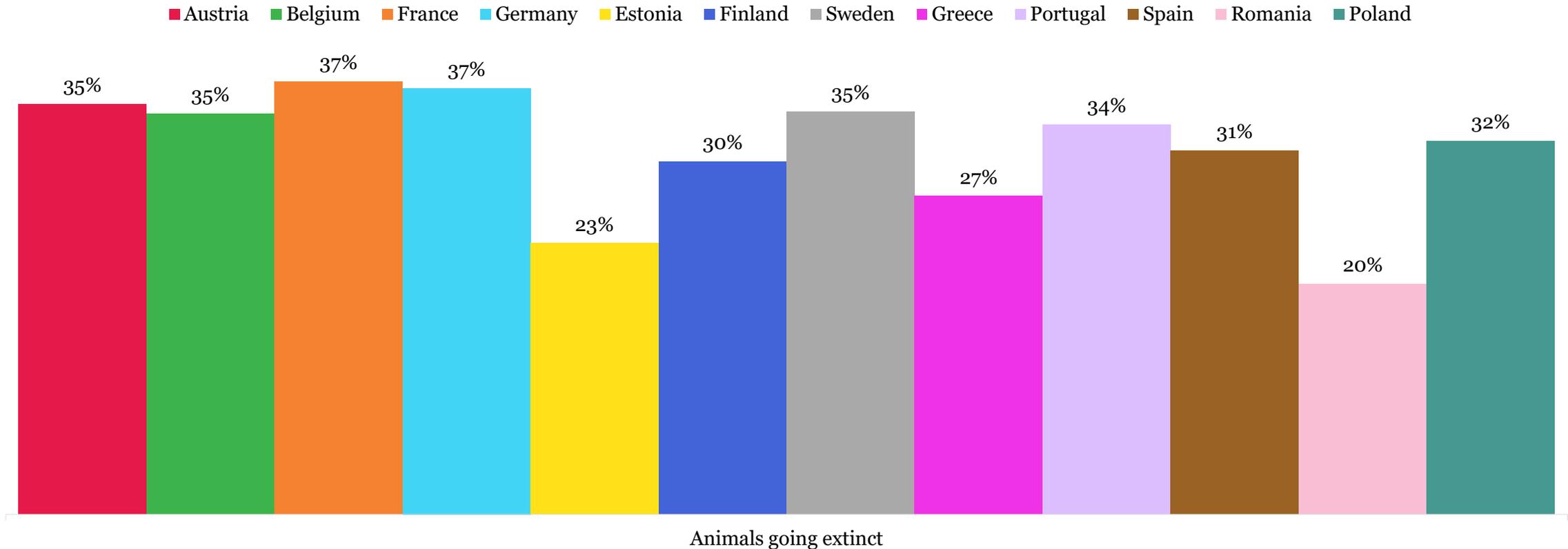
The proportion of respondents in each country who selected **deforestation** as one of the top five most important issues to them personally



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

Almost four in ten French and Germans picked animals going extinct as one of their top five most important issues

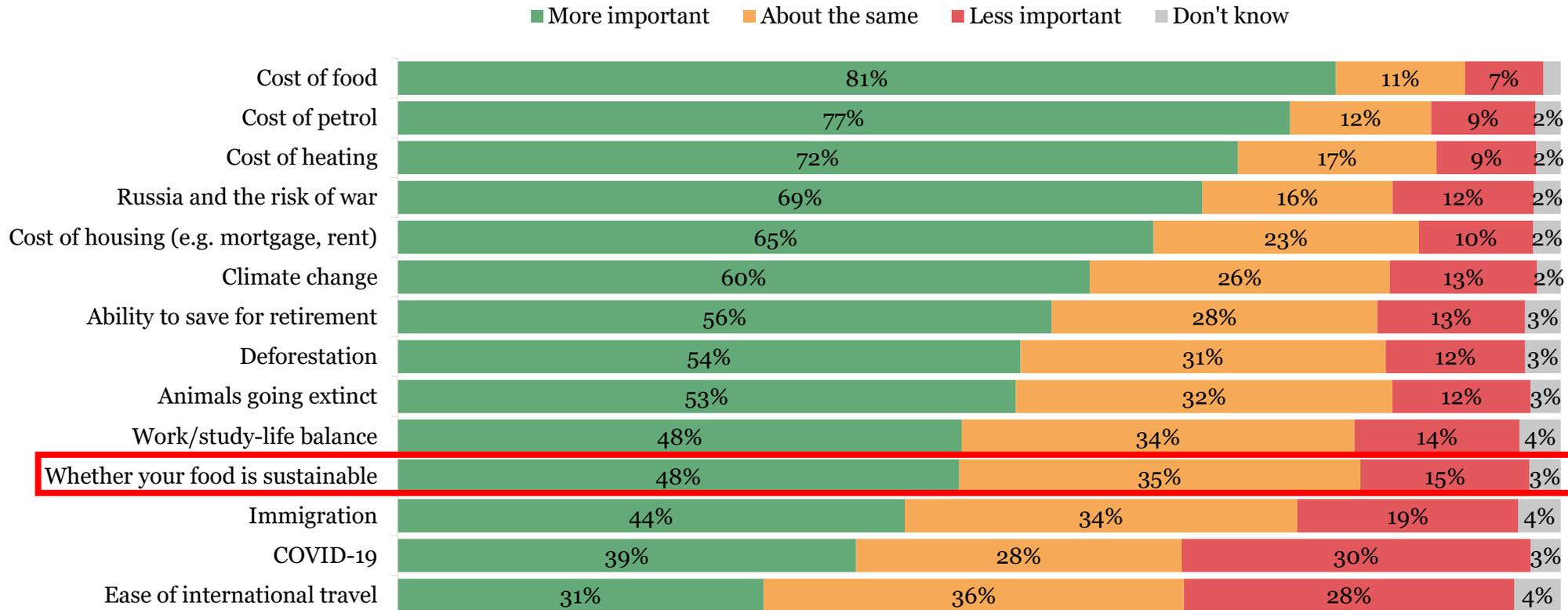
The proportion of respondents in each country who selected **animals going extinct** as one of the top five most important issues to them personally



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

Food sustainability has become more important to almost half of European respondents over the last 12 months.

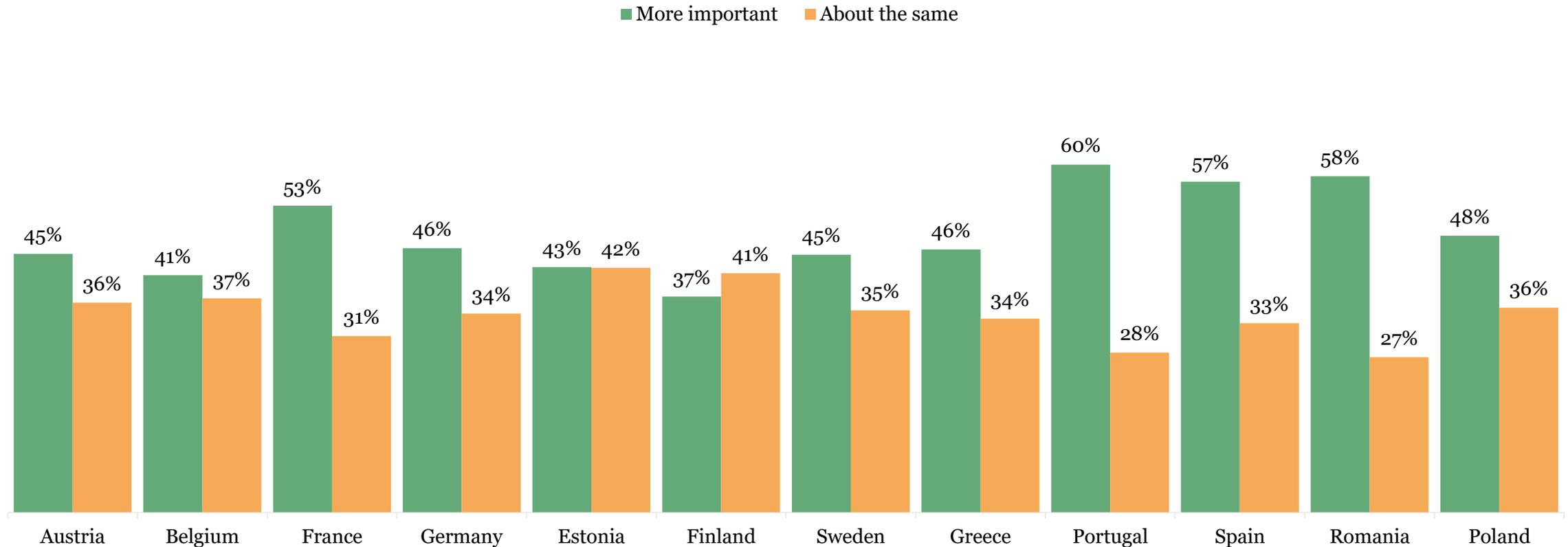
The proportion of EU respondents for whom the importance of the following issues has either grown, fallen, or remained about the same, over the last 12 months



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

In particular, food sustainability has grown in importance for Portuguese, Spaniards and Romanians

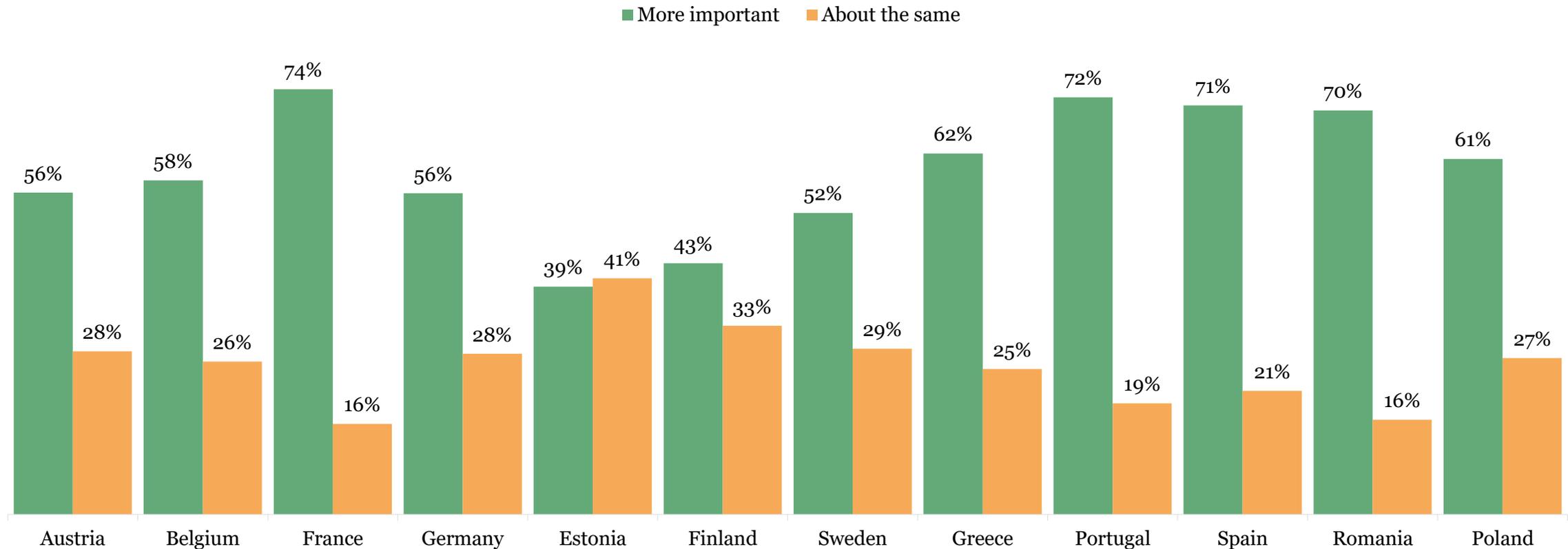
The proportion of respondents in each country for whom the importance of **food sustainability** has either grown over the last 12 months, or has remained about the same



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

Climate change in general has also become more important for many Europeans, in particular the Spanish, Portuguese, Romanians, and French

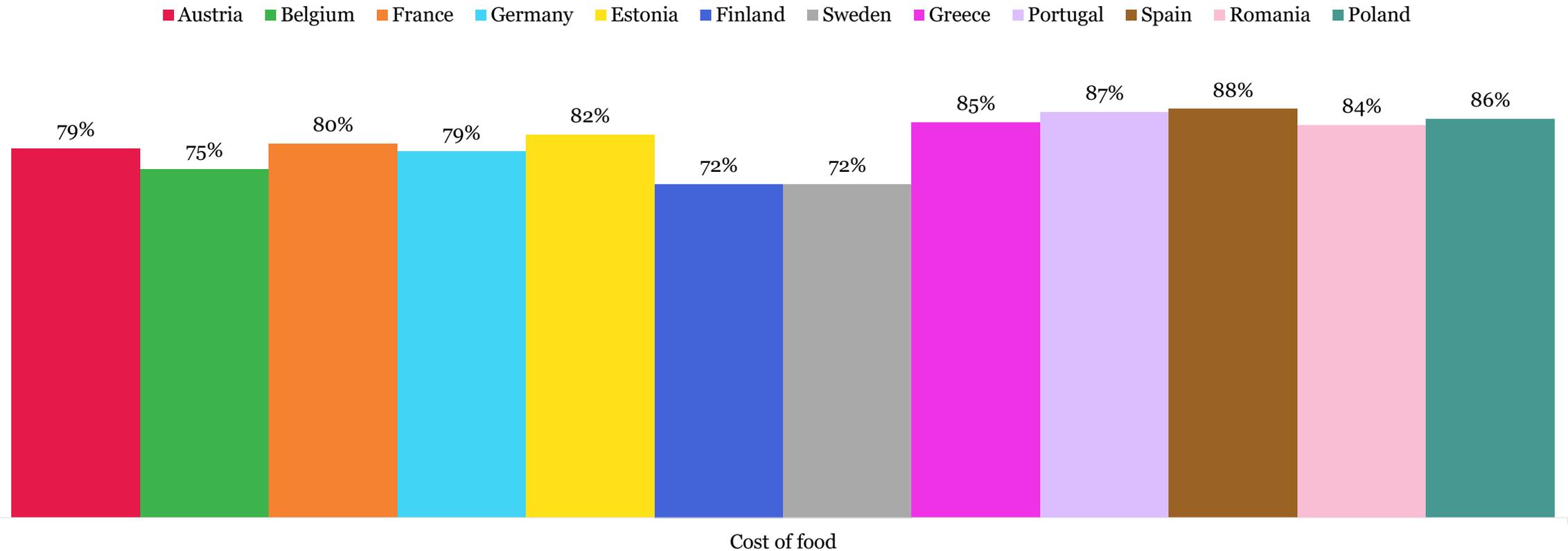
The proportion of respondents in each country for whom the importance of **climate change** has either grown over the last 12 months, or has remained about the same



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

At least eight in ten Europeans across all countries view the cost of food as a more important issue to them now, than they did 12 months ago

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

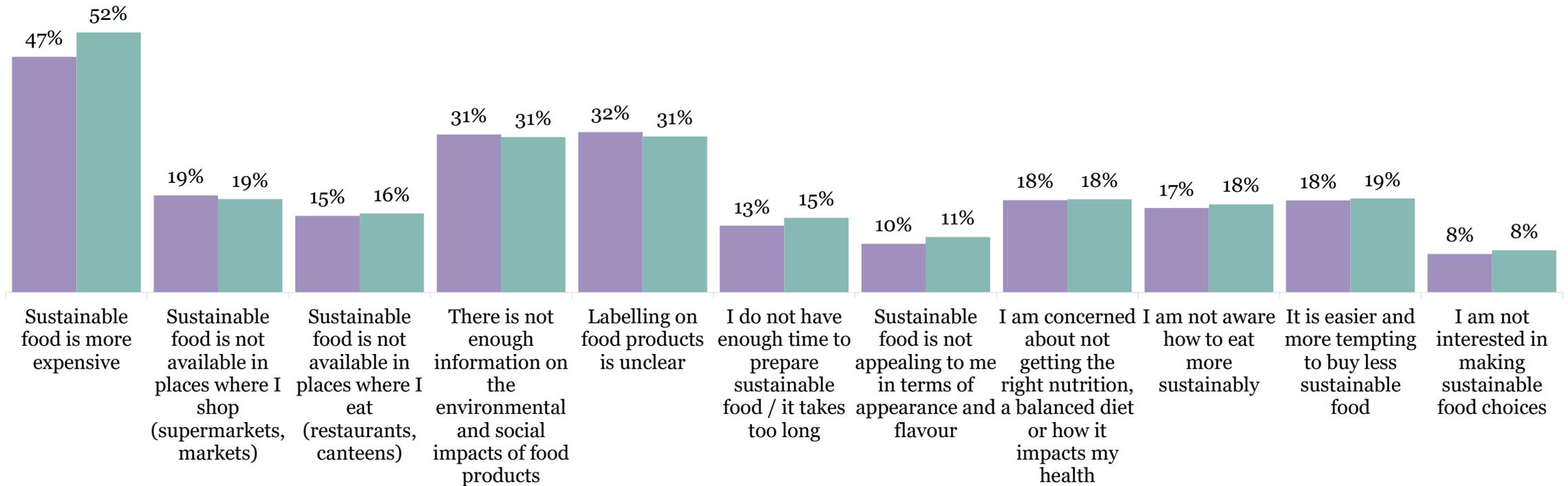


Q19: Cost of food. Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

The increased importance of the cost of food may be related to the cost of sustainable food being a bigger barrier to people eating it in 2022, than it was in 2021

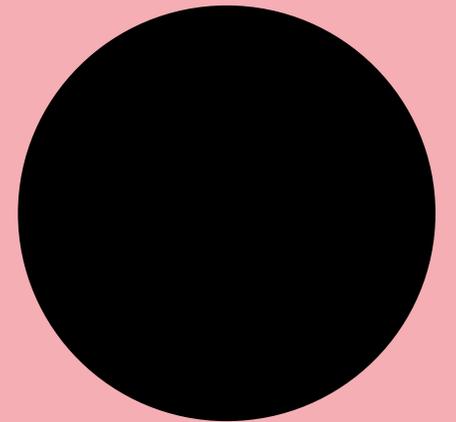
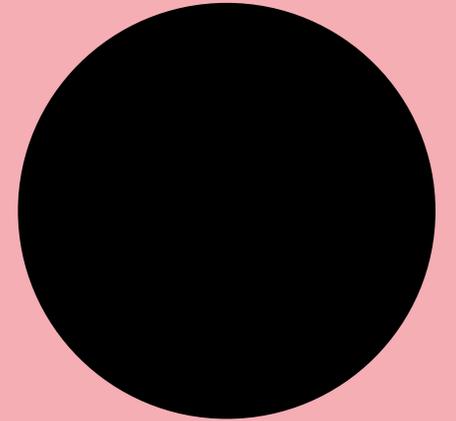
The proportion of respondents in the tracked countries who selected each of the following factors as something that prevents or stops them from eating types of food that are better for the environment and more sustainable, in 2021 and 2022

2021 2022



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?

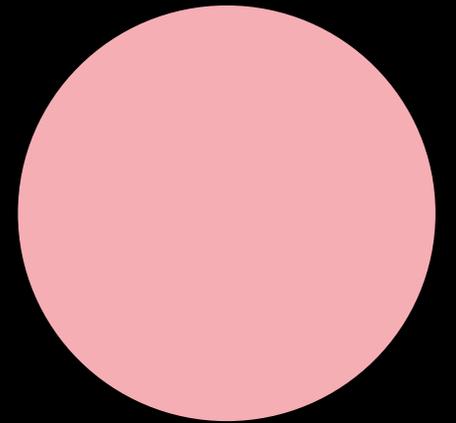
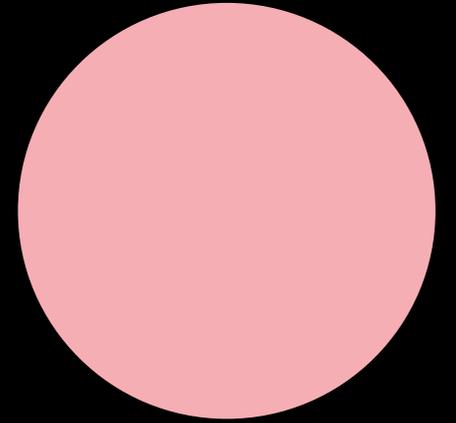
Section Four: Reflections



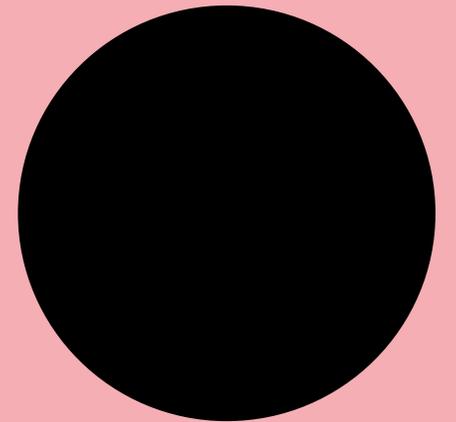
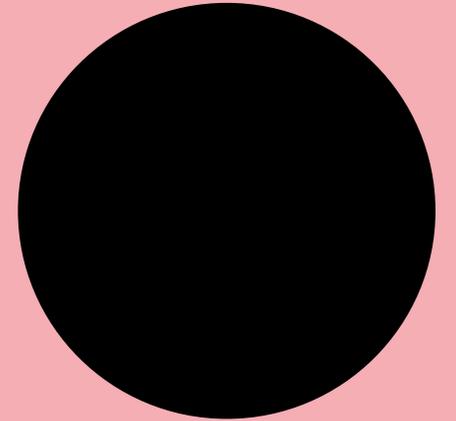
Reflections

- Given that the Government or EU was the organisation most likely to be Europeans' first choice for the group that should lead efforts that would help people make environmentally friendly food choices, lobbying Governments and the EU to make changes is an appropriate strategy.
- That said, when Europeans' first and second choices are taken into account, businesses that produce or manufacture food are also seen as having a responsibility to lead. This group is also the first choice of Mexicans for who should lead on this issue. Future research should therefore explore whether businesses in this sector share this sense of responsibility, and if so, what actions they are taking to fulfil it.
- When specific Government policies are tested, it is not the scale or cost of the intervention that appears to have most impact, but whether or not it is restrictive. An intervention to directly reduce the price of food with low or positive environmental impacts receives the same level of support as introducing reliable environmental impact scores for food labels. Both policies however, are significantly more popular than encouraging people to eat fewer animal products or not using public funds to support the advertising of unhealthy food. As such developing policies that support good behaviour may be more effective than focusing on ones that punish bad behaviour.
- Less than one in five respondents see the sustainability of food as one of the top five most important issues to them personally, yet half of respondents do accord this importance to climate change. This mismatch exists despite the sustainability of food being an environmental issue. Further research may be useful to investigate this disconnect, and see if the reasons people worry about climate change in general would also apply to the issue of sustainable food.

Appendix

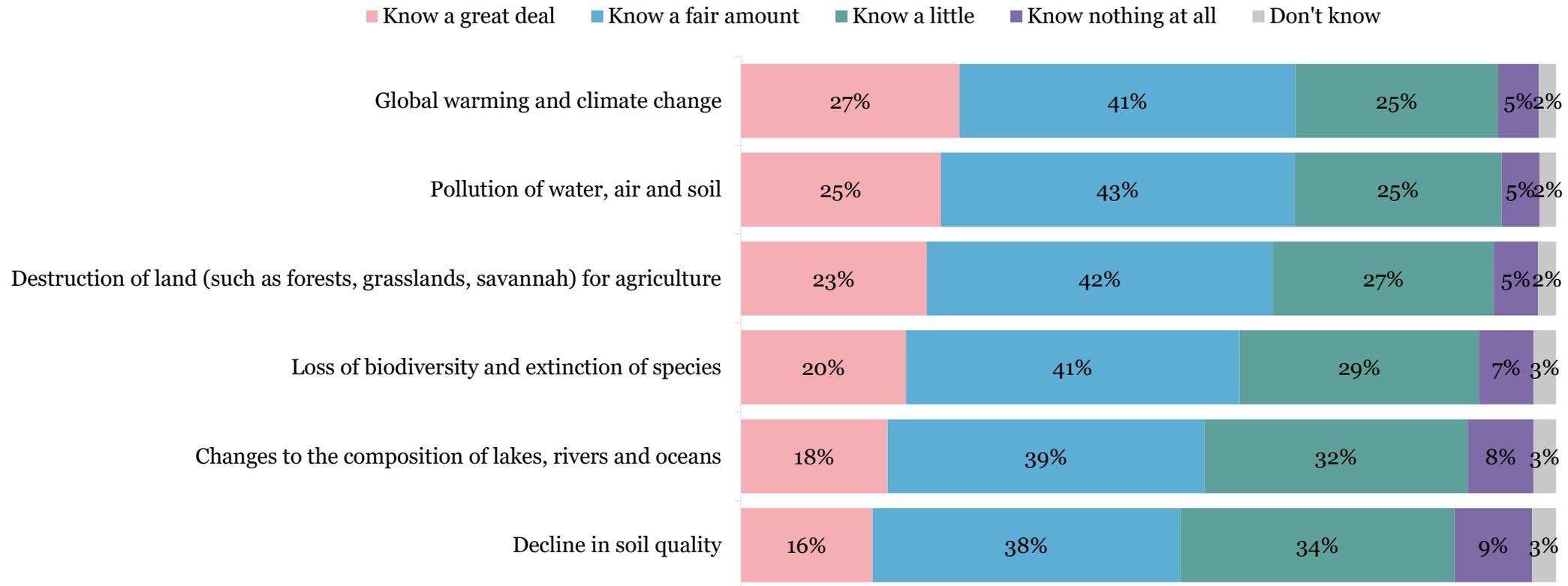


Appendix One: Public Interest in Sustainable Food in the EU



Eight in ten EU respondents know at least a little about the following environmental impacts of food

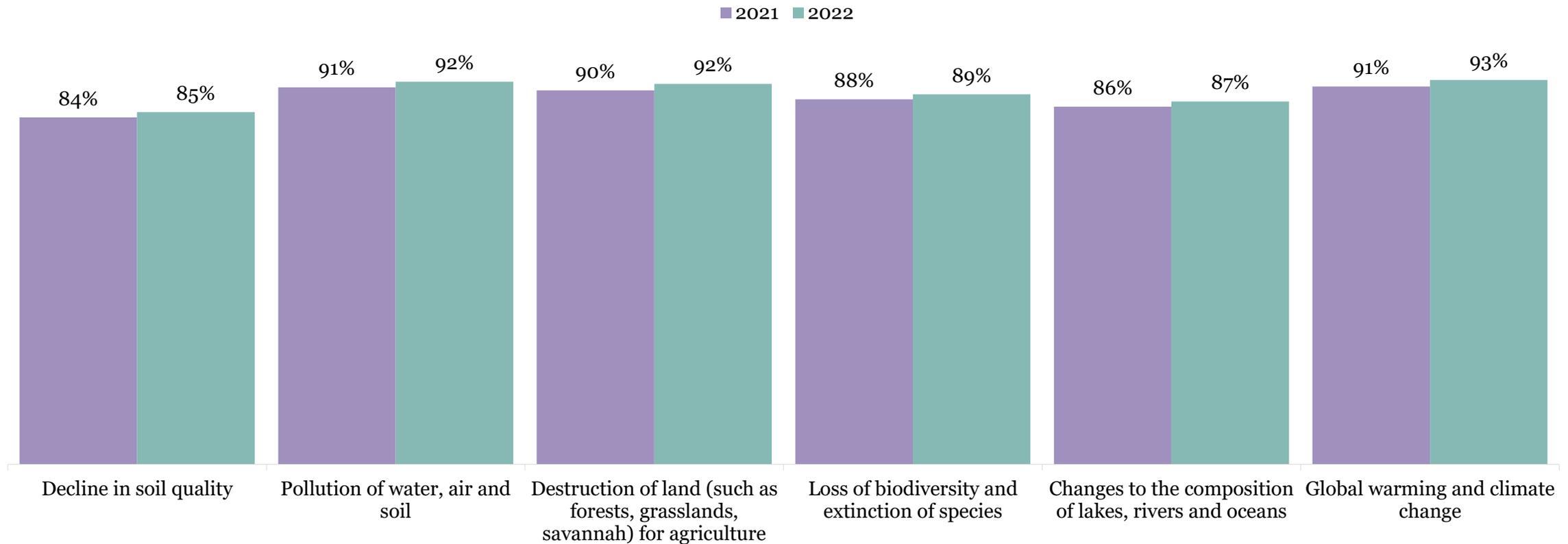
The level of knowledge EU respondents have about each of the following environmental impacts of food



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 proportion of respondents in tracked countries 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 and 2022

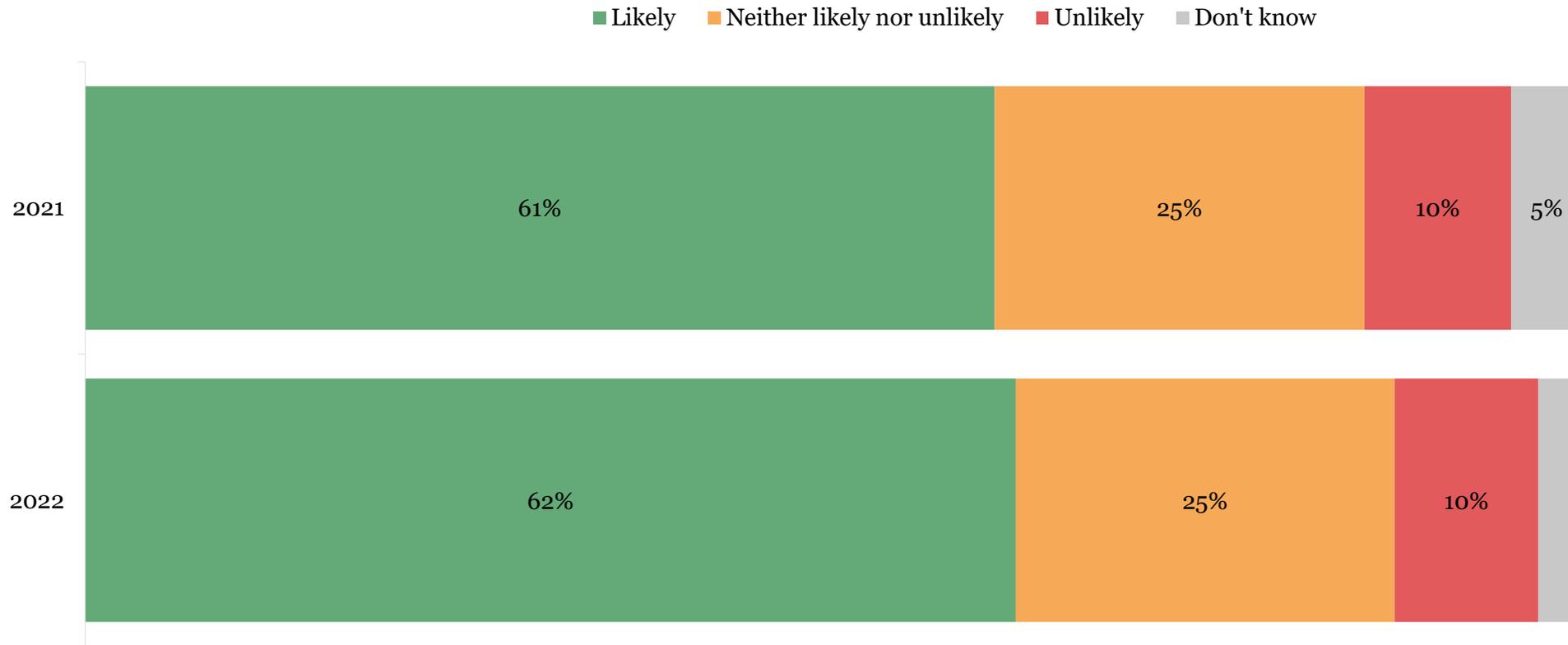


Q5: Before taking part in this survey, how much, if anything, would you say you knew about the following environmental impacts caused by the food we produce and consume on a large scale?

49 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK, 2021 (11,439), 2022 (11,215)

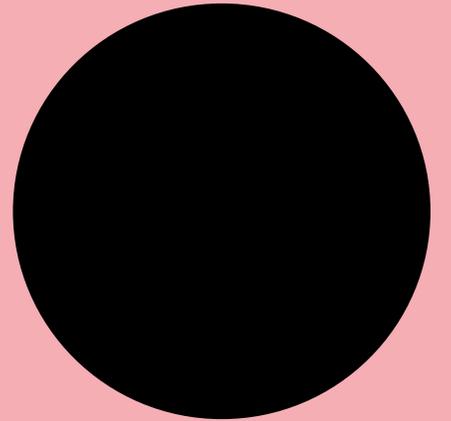
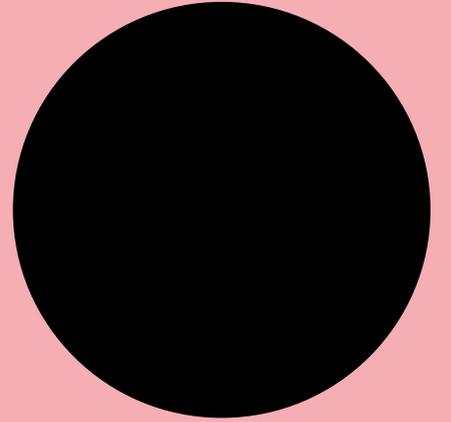
Taken as a whole, the likelihood of respondents buying and eating sustainable food has remained consistent over time in the tracked countries

How likely respondents in tracked countries were to buy and eat sustainable food in 2021 and 2022



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?

Appendix Two: EU Country Summaries



Executive Summary – Austria key standouts

Austrians are more likely than average* to seek financial support only for farmers and fishers, and are more likely to agree with some restrictive policies.

- Austrians are more likely than the average to choose to only financially support farming and fishing businesses (37% vs 31%*)
- Austrian support for some restrictive environmental policies is higher than average.
 - The Government or EU should act to increase the price of foods with high environmental impacts (56% vs 49%*)
 - Advertises for clearly non-sustainable food should be made illegal (43% vs 36%*)

** All country average, 2022*

Executive Summary – Belgium key standouts

Belgians are less likely than average* to be in favour of using food promotions to help people make sustainable food choices, or of ‘buying local’ in general.

- Belgians are less likely than average to agree to agree that food promotions (e.g. 2 for 1 deals) and adverts should be designed to help them make healthier (56% vs 64%*) or more sustainable (57% vs 63%*) food choices.
- Belgians are also less likely than average to agree that the Government/EU should encourage EU people to buy more of their food from local farmers, fishers, or other producers (67% vs 76%*).
 - Relatedly, Belgians are less likely than average to select ‘buying locally grown food’ as one of their top five environmental or ethical considerations when choosing what food to buy (42% vs 51%*).

* *All country average, 2022*

Executive Summary – Estonia key standouts

Estonians are less likely than average* to support restrictive policies, both in general and in order to prevent food shortages. They are also less likely than average to support using food labels and promotions to help consumers make more sustainable food choices.

- Estonians are more likely to prefer that the Government or EU not intervene in the food market.
 - The Government or EU should not act to change the price of food (51% vs 39%*).
 - The Government or EU should not regulate food adverts (40% vs 33%*)
- Estonian support for some restrictive policies is lower than average.
 - The Government or EU should act to increase the price of foods with high environmental impacts (41% vs 49%*).
 - The Government or EU should encourage EU people to eat fewer animal products (e.g. meat, milk, eggs) to help prevent food shortages (35% vs 47%*).
 - The Government or EU should act to reduce the use of cropland for animal feed production to help prevent food shortages (37% vs 46%*).
 - This may be related to Estonians being more likely than average to see the cost of sustainable food as a barrier to them eating it (57% vs 51%).
- Estonians' support for environmental impact scoring labels is lower than average
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (66% vs 72%*).
 - High or low environmental impact scores shown on food packaging will be enough to change whether or not I buy the product (43% vs 54%*).
 - Food promotions (e.g. 2 for 1 deals) and adverts should be designed to help me make more sustainable food choices (56% vs 63%*).

** All country average, 2022*

Executive Summary – Finland key standouts

Finns are more likely than average to prefer the Government or EU provide financial support to businesses to help people make environmentally friendly food choices, and less likely to support using environmental impact scoring labels to help consumers make more environmentally friendly food choices.

- Finns are more likely than average to prefer that the Government or EU employ financial support only when taking action towards the following groups, to help people make environmentally friendly food choices.
 - Supermarkets, small grocery shops, and restaurants (31% vs 25%*).
 - Businesses that process or manufacture food (33% vs 26%*).
 - Farmers and fishing businesses (40% vs 31%*).
- Finns' support for environmental impact scoring labels is lower than average.
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (59% vs 72%*).
 - High or low environmental impact scores shown on food packaging will be enough to change whether or not I buy the product (45% vs 54%*).
 - This could be related to Finns being less likely than average to see a lack of information (21% vs 33%*) or unclear food labelling (27% vs 32%*) as a barrier to eating types of food that are better for the environment.
- Finns are less likely than average to agree that the Government or EU should act to reduce the use of cropland for biofuel production to help prevent food shortages (41% vs 53%*).

** All country average, 2022*

Executive Summary – France key standouts

The French are more likely than average* to support some restrictive policies, both in general and to prevent food shortages, and to view climate change as an important issue to them personally.

- The French are also more likely than the average to support restrictive policies, both in general and to prevent food shortages.
 - French support for increasing the price of foods with high environmental impacts is higher than average (55% vs 49%*).
 - The Government or EU should encourage EU people to eat fewer animal products (e.g. meat, milk, eggs) (54% vs 47%*)
 - The Government or EU act to reduce the use of cropland for animal feed production (54% vs 46%*) to prevent food shortages.
- The French are more likely than average to view climate change as one of the top five issues to them personally (57% vs 49%*), and a larger proportion of French people than average see climate change as having become more important to them over the last 12 months (74% vs 61%*).

* All country average, 2022

Executive Summary – Greece key standouts

Greeks are more likely than average to view helping people make environmentally friendly food choices as the responsibility of the Government or EU. When they exercise this responsibility, Greeks also are more likely than average to prefer that the Government or EU use a combination of regulation and financial support.

- Greeks are more likely than average* to pick the Government or EU as their first choice for which organisation should design or lead efforts that would help people make environmentally friendly food choices (52% vs 37%).
- Greeks are more likely than average to prefer that the Government or EU employ both regulation and financial support when taking action towards the following groups, to help people make environmentally friendly food choices
 - Public canteens and schools (42% vs 35%)
 - Supermarkets, grocery shops and restaurants (45% vs 35%)
 - Businesses that process or manufacture food (43% vs 35%)
 - Farming or fishing businesses (45% vs 36%)

* All country average, 2022

Executive Summary – Portugal key standouts (1)

The Portuguese are more likely than average to view helping people make environmentally friendly food choices as the responsibility of the Government or EU, and are more likely to agree that they should implement a range of supportive and restrictive policies, including applying EU environmental standards to food imports.

- The Portuguese are more likely than average to pick the Government or EU as their first choice for which organisation should design or lead efforts that would help people make environmentally friendly food choices (45% vs 37%).
- Portuguese support for some supportive policies is higher than average
 - The Government or EU should act to lower the price of foods with low or positive environmental impacts (83% vs 77%)
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (83% vs 72%).
 - Food promotions (e.g. 2 for 1 deals) and adverts should be designed to help me make more sustainable food choices (72% vs 63%)
 - They should encourage EU people to buy more of their food from local farmers, fishers, or other producers (85% vs 76%)
 - They should act to prevent food waste, eg. by raising awareness or giving more funding to food banks (82% vs 75%)
- Portuguese support for some restrictive policies, both in general and to help prevent food shortages, is also higher than average.
 - The Government or EU should act to increase the price of foods with high environmental impacts (58% vs 49%)
 - They should encourage EU people to eat fewer animal products (e.g. meat, milk, eggs) (57% vs 47%).
 - They should act to reduce the use of cropland for animal feed production (55% vs 46%)
- In addition, the Portuguese are more likely to support applying EU environmental standards to food imports from all countries outside of the EU (71% vs 62%).

** All country average, 2022*

Executive Summary – Portugal key standouts (2)

On a personal level, the Portuguese are also more likely than average to feel that environmental issues have become more important in the last 12 months, and that environmental impact scores would help them make environmentally friendly food choices.

- Portuguese are more likely than average to agree that high or low environmental impact scores shown on food packaging will be enough to change whether or not they buy the product in question (62% vs 54%*).
- A larger than average proportion of Portuguese see the sustainability of their food (60% vs 50%*), and climate change in general (72% vs 61%*), as having become more important in the last 12 months.

* *All country average, 2022*

Executive Summary – Sweden key standouts

Swedes are less likely than average* to support government intervention in food advertising in general, whether the policies in question seek to support consumers or restrict advertisers. In addition, Swedes are less likely than average to agree the Government or EU should adopt some supportive policies to help prevent food shortages.

- Swedes' support for environmental impact scoring labels is lower than average.
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (58% vs 72%)
 - High or low environmental impact scores shown on food packaging will be enough to change whether or not I buy the product (47% vs 54%)
 - Food promotions (e.g. 2 for 1 deals) and adverts should be designed to help me make more sustainable food choices (49% vs 63%)
- Swedes' agreement that the Government should restrict food advertising specifically is lower than average.
 - The Government or EU should not regulate food adverts (39% vs 33%)
 - Government or EU funding should not be used to support the advertising of non-sustainable food (43% vs 52%)
 - Adverts for clearly non-sustainable food should be made illegal (29% vs 36%)
- Swedes are less likely than average to agree that the Government or the EU should encourage EU people to buy more of their food from local farmers, fishers, or other producers (64% vs 76%*) or act to prevent food waste, eg. by raising awareness or giving more funding to food banks (62% vs 75%*) to help prevent food shortages.
- In addition, Swedes are more likely than average to support applying EU environmental standards to food imports from rich countries only, though it remains a minority position (22% vs 17%).

* All country average, 2022

Executive Summary – Germany key standouts

German support for a range of supportive policies is lower than average*.

- Germans' support for environmental impact scoring labels is lower than average
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (65% vs 72%*).
 - High or low environmental impact scores shown on food packaging will be enough to change whether or not I buy the product (47% vs 54%*)
- German support for lowering the price of food with low or positive environmental impacts is lower than average (69% vs 77%*).
- Germans are also less likely than average to agree that the Government or the EU should encourage EU people to buy more of their food from local farmers, fishers, or other producers to help prevent food shortages (69% vs 76%*).
 - This is despite them being no less likely than average to select buying local as one of their top five ethical or environmental considerations (52% vs 51%).
- Germans are more likely than average to view the cost of heating as one of the top five issues to them personally (48% vs 38%).

* All country average, 2022

Executive Summary – Spain key standouts

Spaniards are more likely than average* to view helping people make environmentally friendly food choices as the responsibility of the Government or EU. They are more likely to prefer supportive policies to help prevent food shortages, and to support applying EU standards to food imports from all countries. Spaniards are also more likely to view climate change as an important issue to them personally

- The Spanish are more likely than average to pick the Government or EU as their first choice for which organisation should design or lead efforts that would help people make environmentally friendly food choices (46% vs 37%).
- Spaniards are more likely than average to agree that the Government or the EU should encourage EU people to buy more of their food from local farmers, fishers, or other producers (83% vs 76%*) or act to prevent food waste, eg. by raising awareness or giving more funding to food banks (82% vs 75%*) to help prevent food shortages.
- Spanish support for environmental impact scoring labels is higher than average
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (80% vs 72%*).
- In addition, Spaniards are more likely to support applying EU environmental standards to food imports from all countries outside of the EU (73% vs 62%*).
- Spaniards are more likely than average to view climate change as one of the top five issues to them personally (56% vs 49%) and a larger proportion of Spanish people than average see climate change as having become more important to them over the last 12 months (71% vs 61%).

* *All country average, 2022*

Executive Summary – Poland key standouts

Poles' views tend to reflect the all country average*, though they are less likely than most to view the Government or EU as having primary responsibility for helping people make environmentally friendly food choices.

- Poles are less likely than average to pick the Government or EU as their first choice for which organisation should design or lead efforts that would help people make environmentally friendly food choices (31% vs 37%*).

* *All country average, 2022*

Executive Summary – Romania key standouts (1)

Romanians display high levels of support for both restrictive and supportive policies, mostly in general, including the application of EU environmental standards to food imports from all countries outside of the EU. However, if changing the price of food is not linked with its environmental impact, Romanians are more likely than average to oppose this intervention.

- Romanian support for some restrictive policies is higher than average.
 - The Government or EU should act to increase the price of foods with high environmental impacts (55% vs 49%)
 - Government or EU funding should not be used to support the advertising of non-sustainable food (58% vs 52%)
 - Advertises for clearly non-sustainable food should be made illegal (47% vs 36%)
- Romanian support for some supportive policies is also higher than average
 - The Government or EU should act to lower the price of foods with low or positive environmental impacts (83% vs 77%)
 - Food promotions (e.g. 2 for 1 deals) and adverts should be designed to help me make more sustainable food choices (71% vs 63%)
 - They should encourage EU people to buy more of their food from local farmers, fishers, or other producers (84% vs 76%)
- The Government or EU should not act to change the price of food (49% vs 39%).
- In addition, Romanians more likely to support applying EU environmental standards to food imports from all countries outside of the EU (73% vs 62%)

** All country average, 2022*

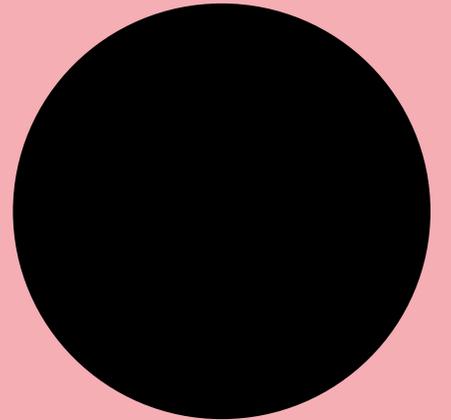
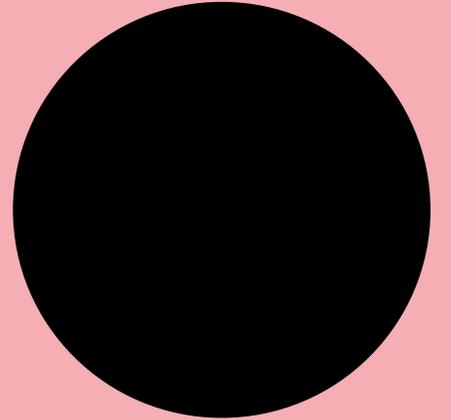
Executive Summary – Romania key standouts (2)

Romanians are more likely than average to feel that environmental issues have become more important in the last 12 months, and that environmental impact scores would help them make environmentally friendly food choices.

- Romanian support for environmental impact scoring labels is higher than average
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (82% vs 72%).
 - High or low environmental impact scores shown on food packaging will be enough to change whether or not I buy the product (64% vs 54%)
- Romanians are more likely than average to view the cost of heating (49% vs 38%) and deforestation (39% vs 31%) as one of the top five issues to them personally.
- A larger proportion of Romanians than average see sustainable food (58% vs 50%) and climate change (70% vs 61%) as having become more important to them in the last 12 months.

** All country average, 2022*

Appendix Three: The UK



Executive Summary – UK key standouts

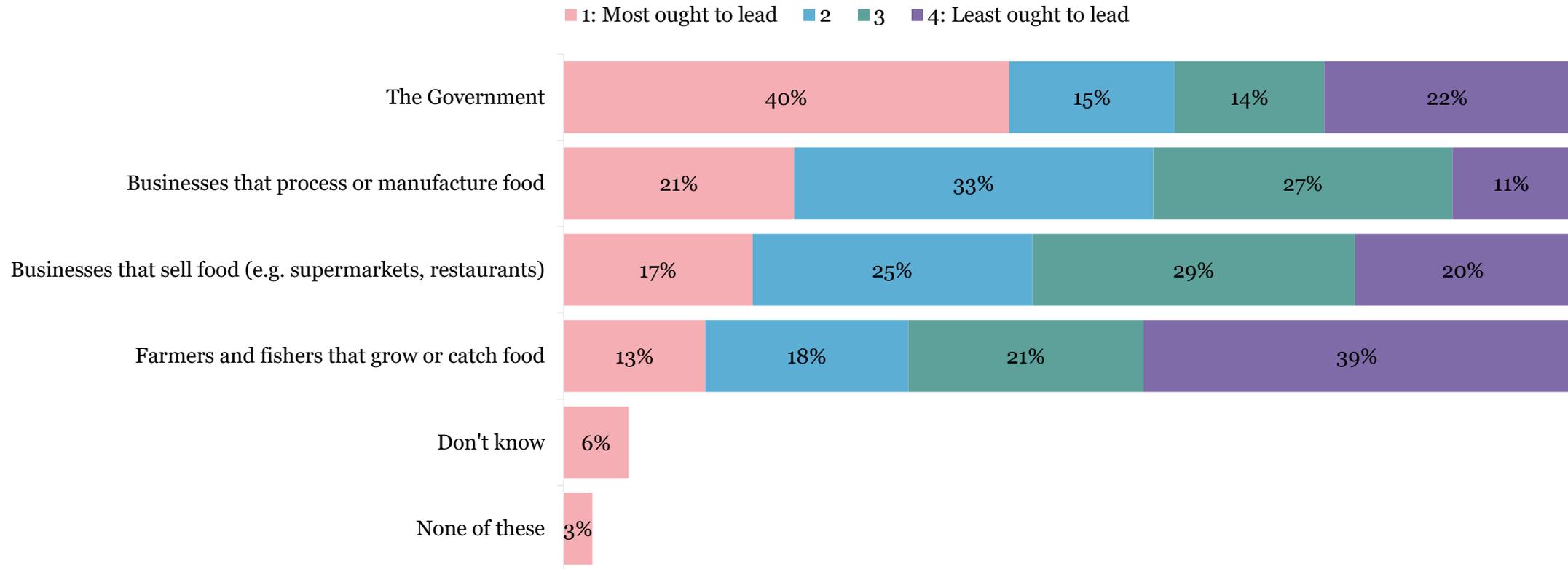
The British are less likely than average to agree that certain restrictive policies be implemented, and are also less likely than average to see environmental issues as having become more important over the past 12 months. The British are sensitive to the cost of food, but that does not appear to have had an impact on them eating sustainably.

- British support for some restrictive policies is lower than average.
 - The Government or EU should act to increase the price of foods with high environmental impacts (42% vs 49%*)
 - Adverts for clearly non-sustainable food should be made illegal (28% vs 36%*)
- A smaller proportion of UK respondents than average view sustainable food (39% vs 50%) and climate change (53% vs 61%) as having become more important to them over the last 12 months.
- The British are more likely than average to view the cost of food (72% vs 61%) and the cost of heating (64% vs 38%) as one of the top five issues to them personally.
 - However they are no more or less likely than average to perceive the cost of sustainable food as a barrier to eating it (51% vs 51%*).

** All country average, 2022*

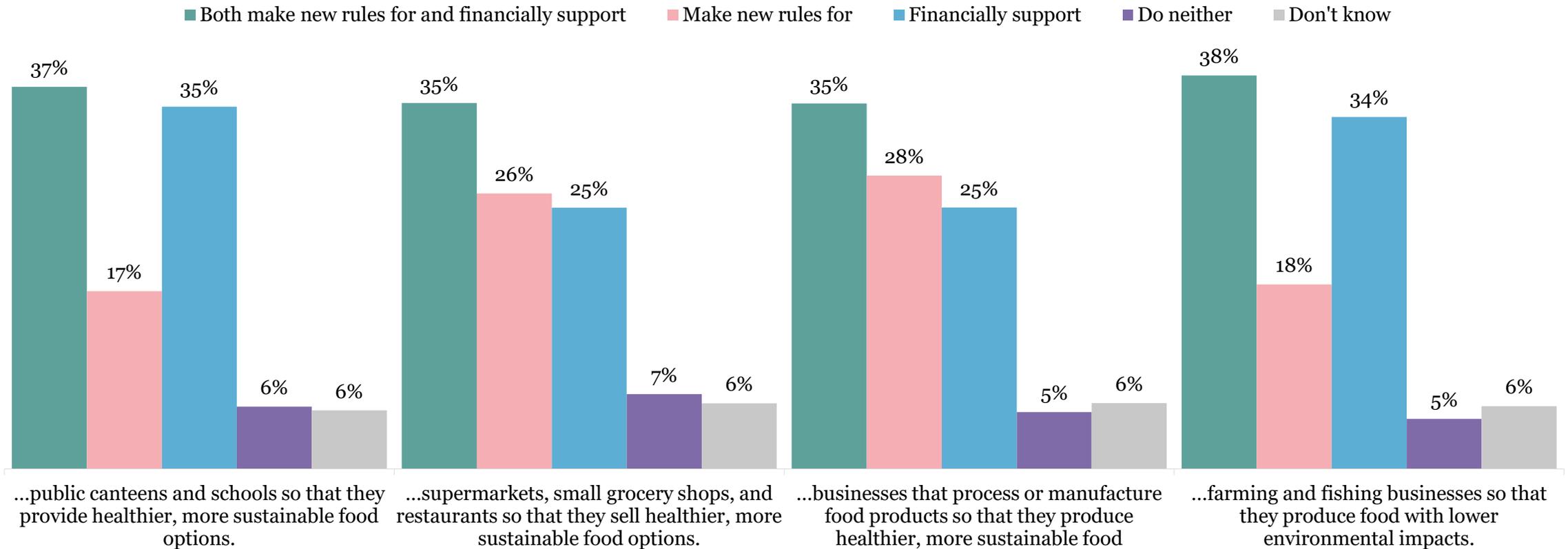
Much like other Europeans, UK respondents pick their government as their first choice for helping people make environmentally friendly food choices

The proportion of UK respondents who believe each group ought to lead efforts to help people make environmentally friendly food choices, on a scale from most, to least, ought to lead



Q12: Who do you think should design and lead efforts that would help people make environmentally-friendly food choices?

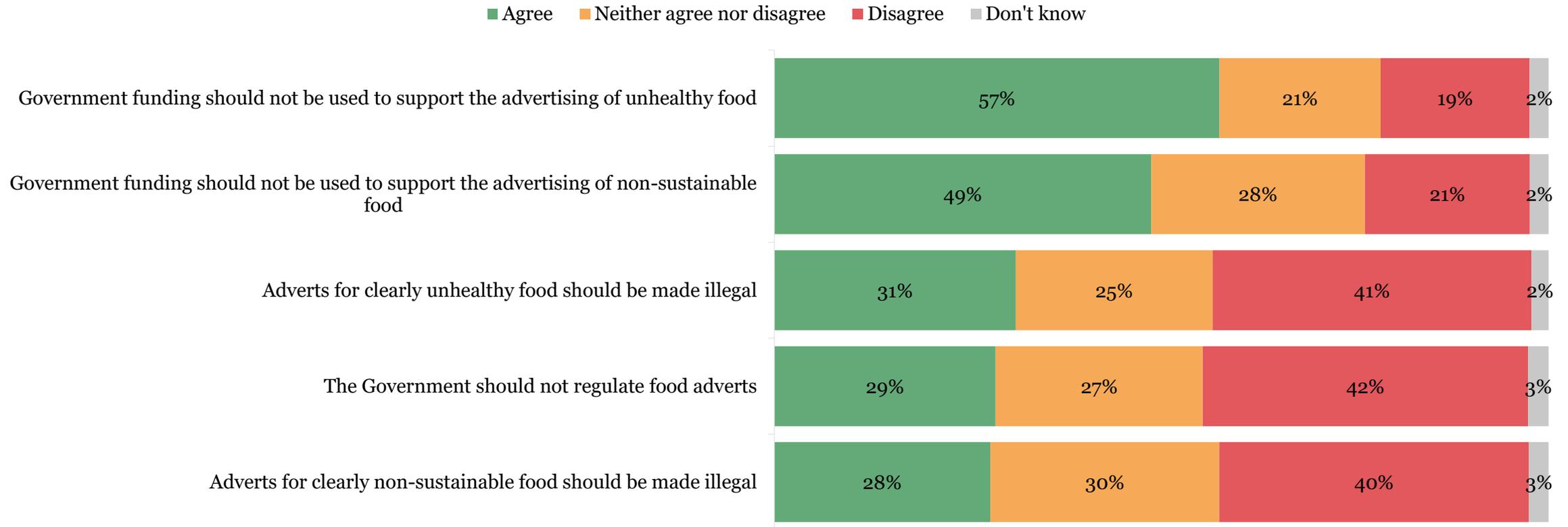
When asked what actions their Government should take towards the following groups to help respondents make more environmentally-friendly food choices, most UK respondents prefer that this action involve both making new rules and financial support



Q13: Which of the following actions if any, should the Government/EU take towards the following groups, to help you make more environmentally-friendly food choices?

More UK respondents disagree than agree that adverts for clearly non-sustainable food should be made illegal

The proportion of UK respondents who agree/disagree with the following statements

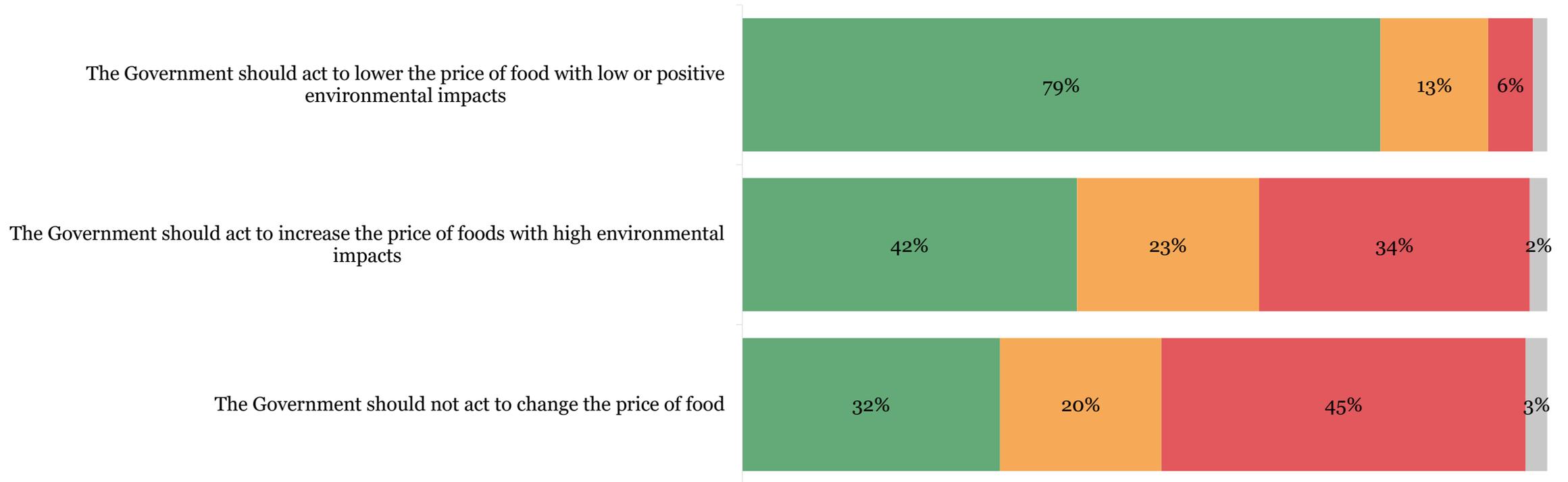


Q15. To what extent, if at all, do you agree or disagree with the following statements?

Eight in ten UK respondents agree that the Government should act to lower the price of food with low or positive environmental impacts

The proportion of UK respondents who agree/disagree with the following statements

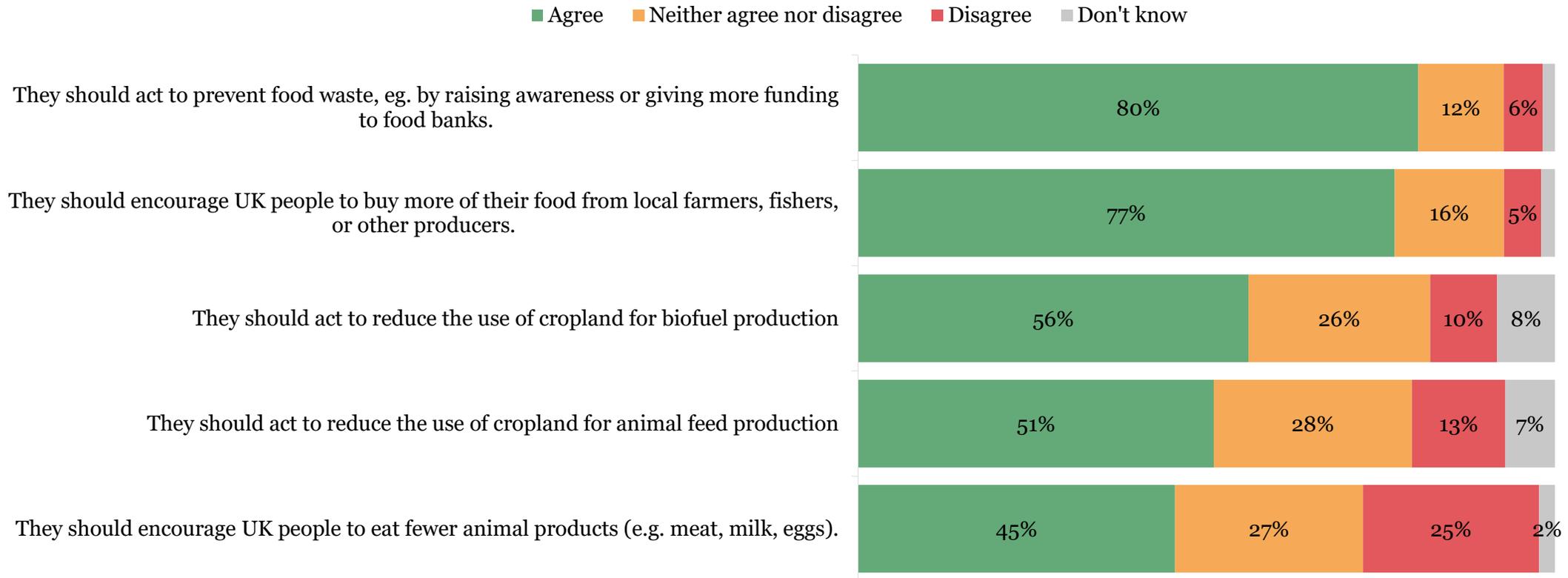
■ Agree ■ Neither agree nor disagree ■ Disagree ■ Don't know



Q14. To what extent, if at all, do you agree or disagree with the following statements?

Eight in ten UK respondents agree that the Government should act to prevent food waste

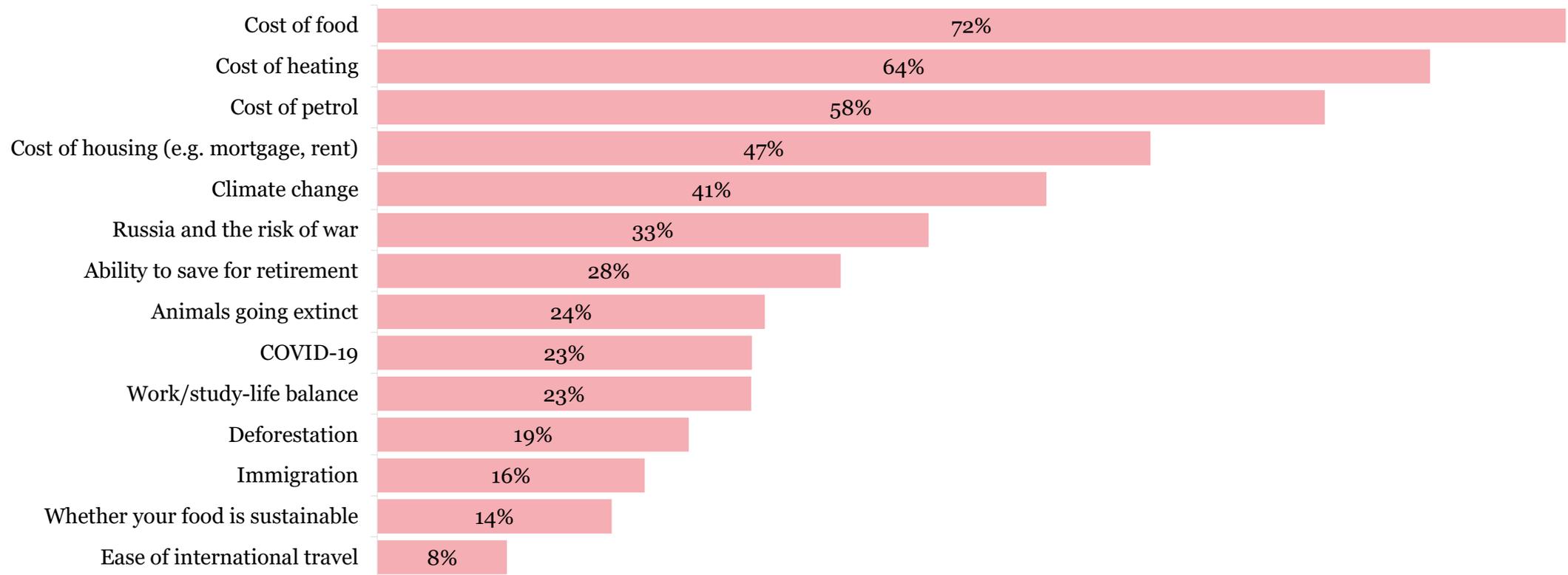
The proportion of UK respondents who agree/disagree that their Government should do the following to help prevent food shortages



Q16. To what extent do you agree or disagree that the Government or the EU should do the following, to help prevent food shortages?

The cost of living is more important to UK respondents than climate change

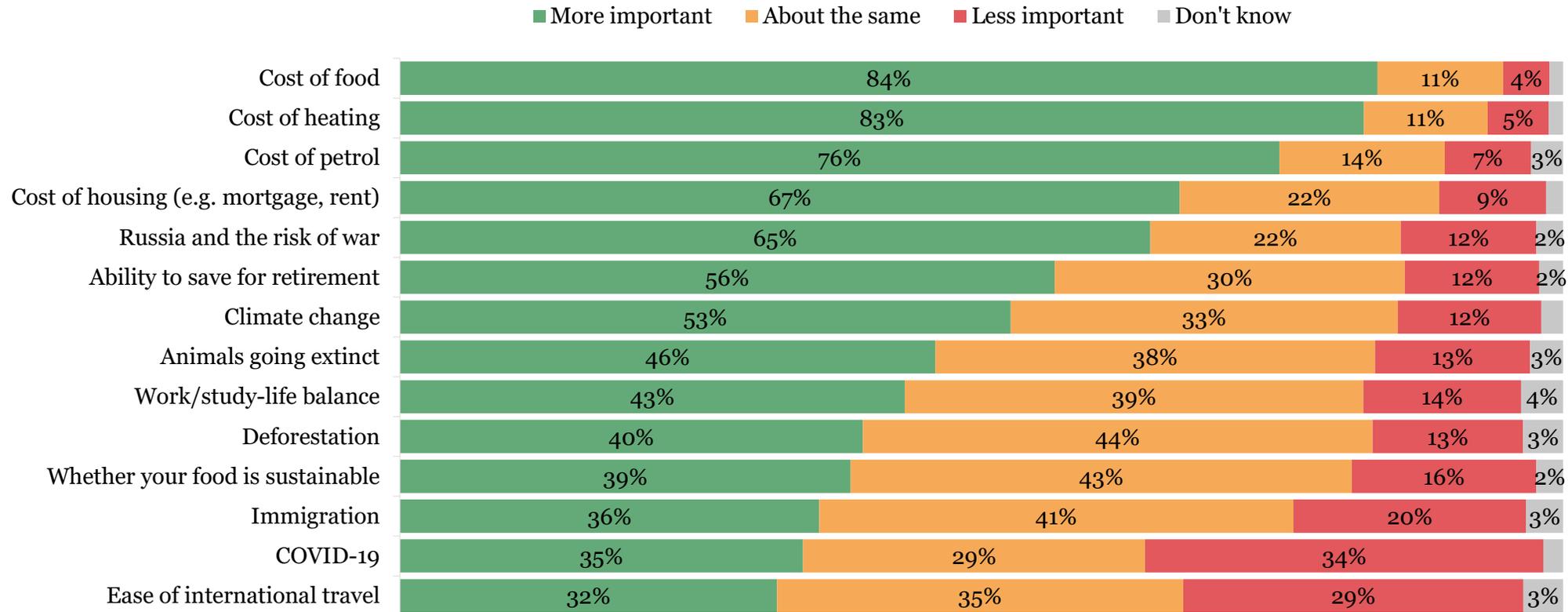
The proportion of UK respondents who selected each of the following issues as being one of the top five most important issues to them personally



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

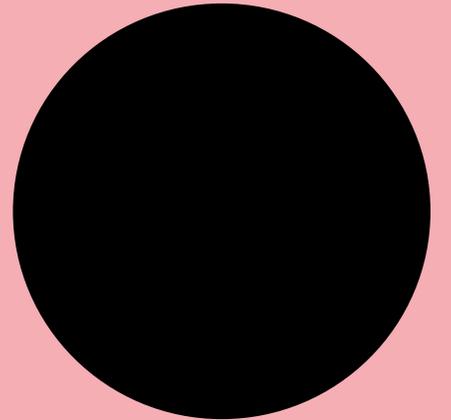
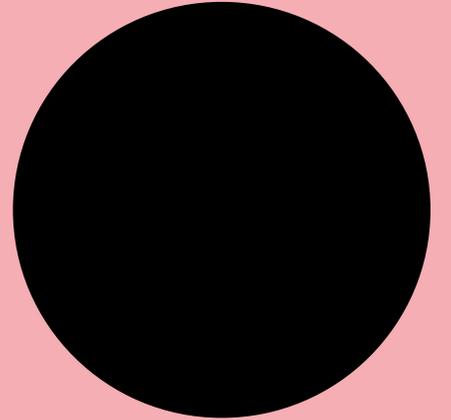
The cost of living, and in particular the cost of food and heating, has become more important to most UK respondents over the last 12 months

The proportion of UK respondents for whom the importance of the following issues has either grown, fallen, or remained about the same, 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

Appendix Four: Mexico



Executive Summary – Mexico key standouts (1)

Mexicans are less likely than average* to view the Government as having primary responsibility for helping people make environmentally friendly food choices, instead according first place to businesses that process or manufacture food. Despite this, Mexicans are also more likely than average to support the Government using regulation alone to help people make environmentally friendly food choices.

- Mexicans are less likely than average to pick the Government (19% vs 37%*), and more likely to pick businesses that process or manufacture food (32% vs 21%*) and businesses that sell food (23% vs 16%*) as their first choice for which organisation should design or lead efforts that would help people make environmentally friendly food choices.
- Mexicans are more likely than average to prefer that the Government or EU employ new rules only when taking action towards the following groups, to help people make environmentally friendly food choices
 - Supermarkets, small grocery shops, and restaurants (37% vs 27%*).
 - Businesses that process or manufacture food (36% vs 26%*)
 - Farming and fishing businesses (33% vs 21%*)
- Mexicans are more likely than average to agree with the following policies:
 - The Government should lower the price of foods with low or positive environmental impacts (86% vs 77%*).
 - Food promotions (e.g. 2 for 1 deals) and adverts should be designed to help me make more sustainable food choices (71% vs 63%*)
 - Adverts for clearly non-sustainable food should be made illegal (43% vs 36%*)

** All country average, 2022*

Executive Summary – Mexico key standouts (2)

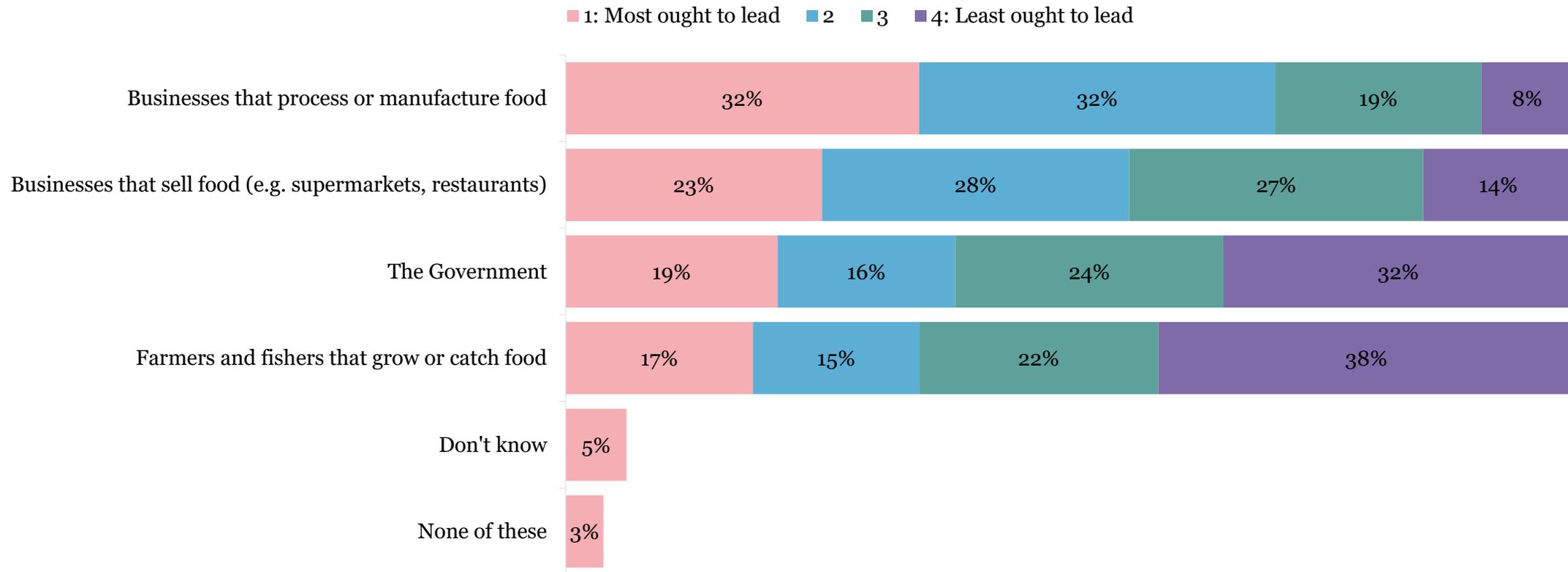
Mexicans are more likely than average* to feel both that multiple environmental issues are important to them personally, and that these issues have become more important in the last 12 months. In addition, they are more likely than average* to agree that environmental impact scores would help them make environmentally friendly food choices.

- Mexican support for environmental impact scoring labels is higher than average
 - The Government or EU should inform consumers of the environmental impact of food products through reliable environmental impact scoring labels (89% vs 72%*).
 - High or low environmental impact scores shown on food packaging will be enough to change whether or not I buy the product (74% vs 54%*)
- Mexicans are more likely than average to view climate change (65% vs 49%*), animals going extinct (51% vs 32%*), deforestation (45% vs 31%*), whether their food is sustainable (43% vs 19%*), and COVID-19 (43% vs 23%*) as one of the top five issues to them personally.
- A larger proportion of Mexicans than average see sustainable food (77% vs 50%*) and climate change (84% vs 61%*) as having become more important to them in the last 12 months

** All country average, 2022*

In contrast to Europeans, a plurality of Mexicans picked businesses that produce/manufacture food as their first choice for helping people make environmentally friendly food choices

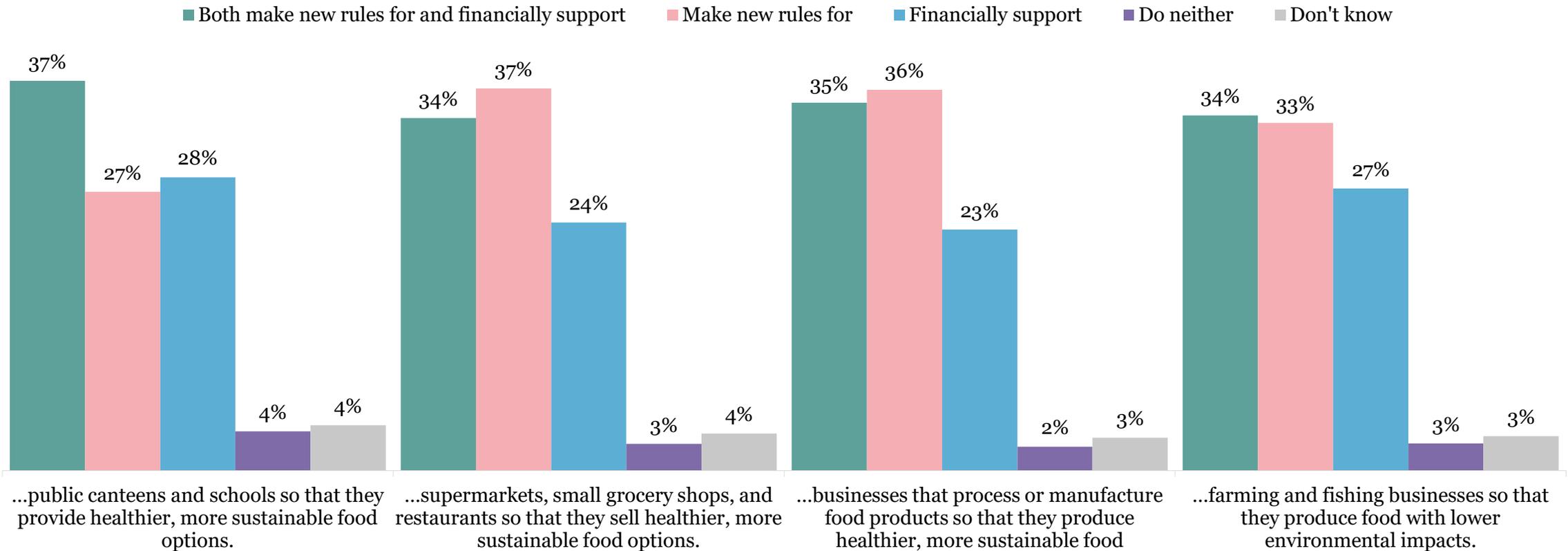
The proportion of Mexican respondents who believe each group ought to lead efforts to help people make environmentally friendly food choices, on a scale from most, to least, ought to lead



Q12: Who do you think should design and lead efforts that would help people make environmentally-friendly food choices?

Despite thinking that businesses should take the lead, Mexicans are much more supportive than Europeans of their Government using regulation on its own to help people make environmentally friendly food choices

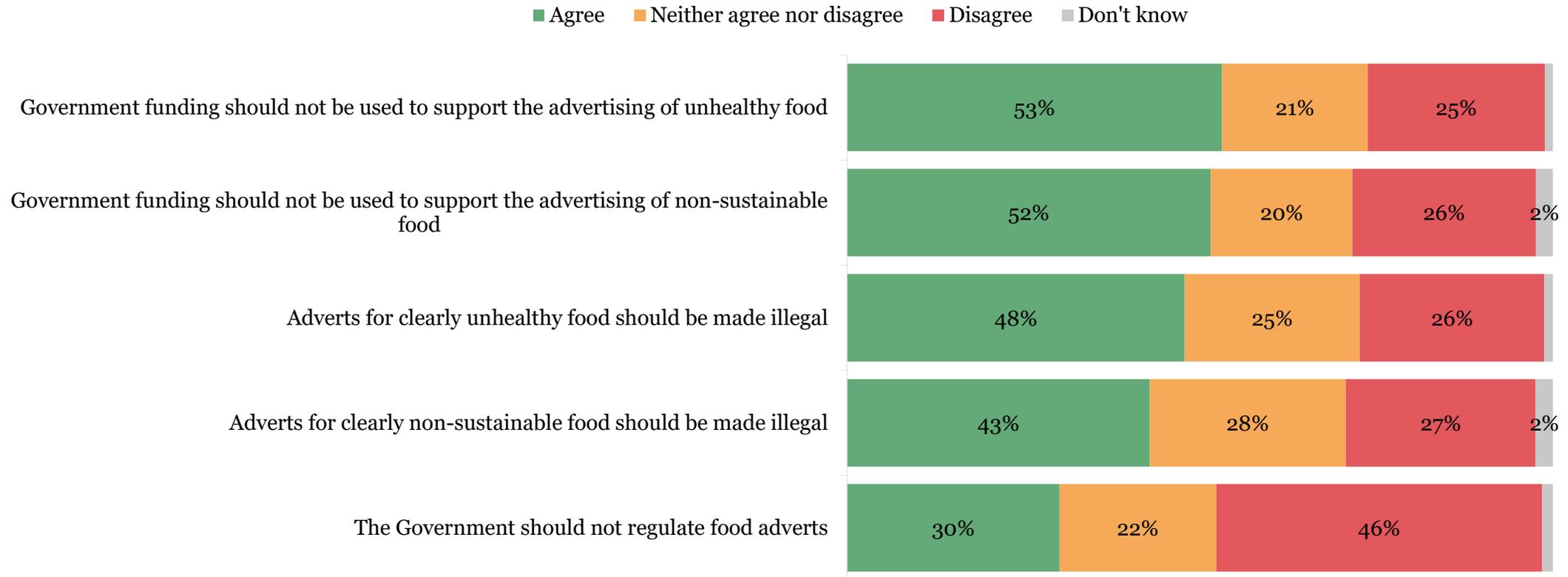
The proportion of Mexican respondents who prefer that action taken towards the following groups involves making new rules, financial support, both, or neither



Q13: Which of the following actions if any, should the Government/EU take towards the following groups, to help you make more environmentally-friendly food choices?

Just over half of Mexicans agree that government funding should not be used to support the advertising of unhealthy or non-sustainable food

The proportion of Mexican respondents who agree/disagree with the following statements

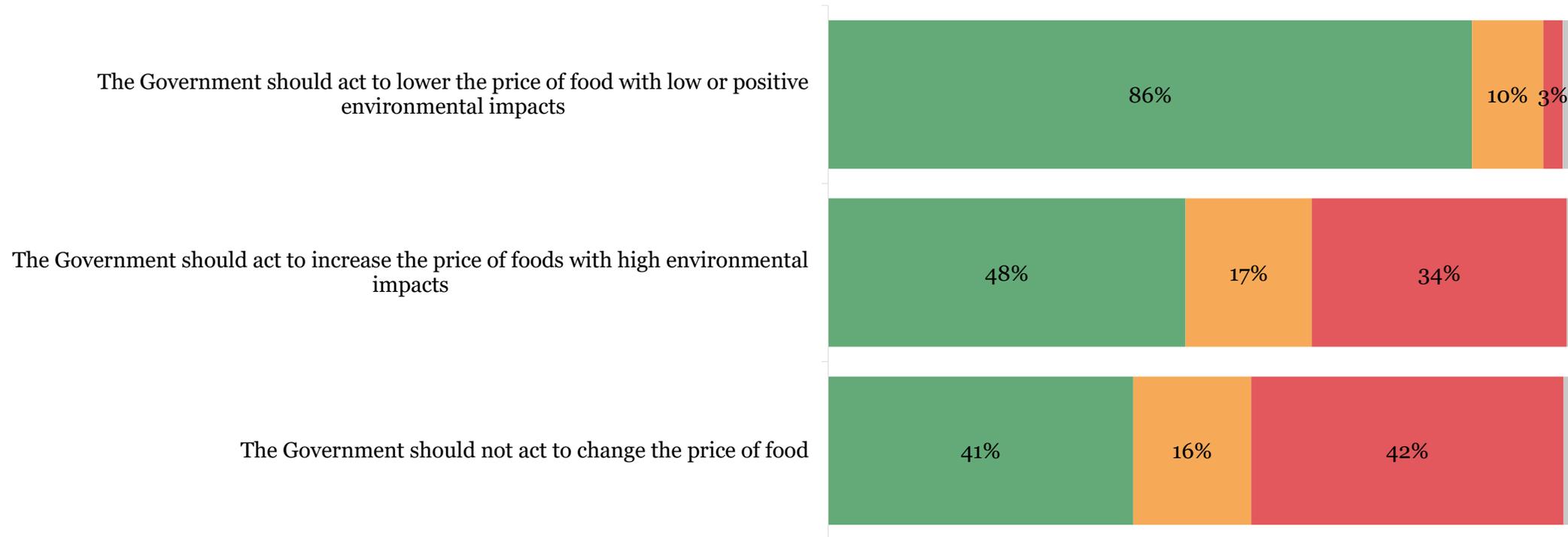


Q15. To what extent, if at all, do you agree or disagree with the following statements?

Almost nine in ten Mexicans agree that their government should act to lower the price of food with low or positive environmental impacts

The proportion of Mexican respondents who agree/disagree with the following statements

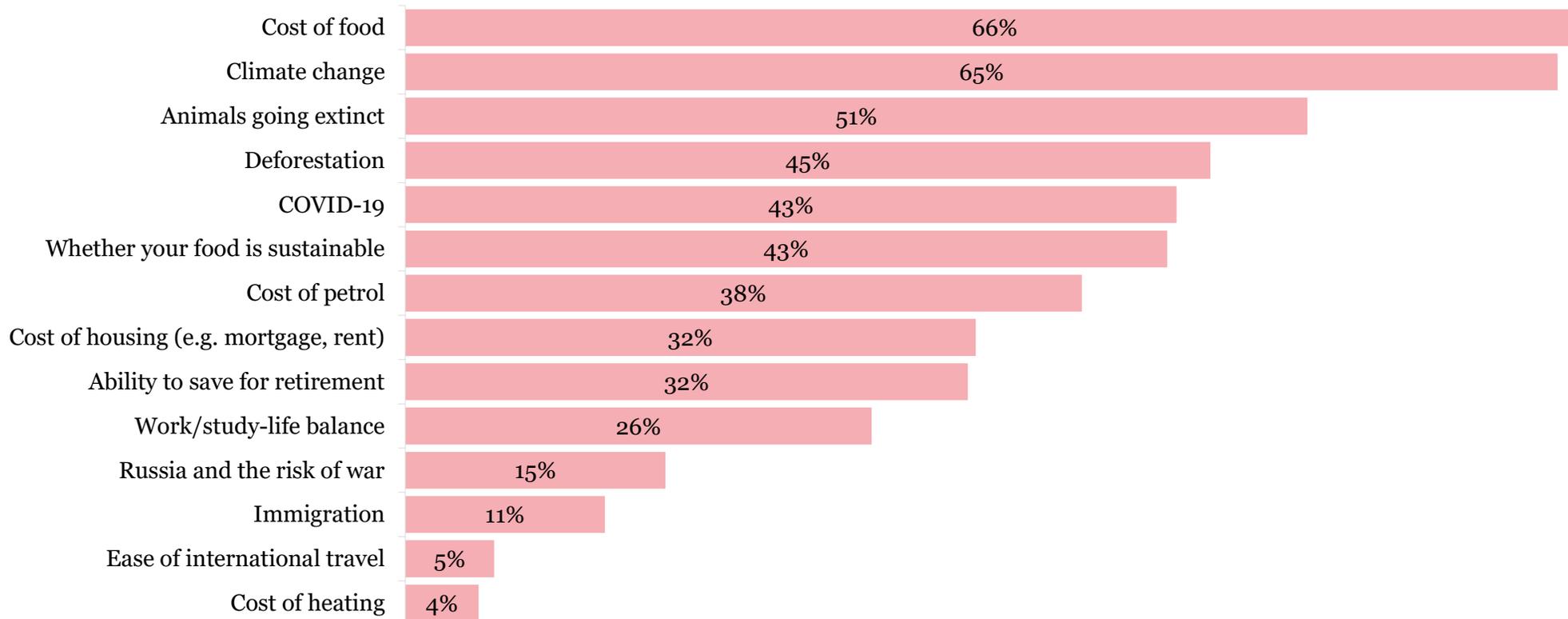
■ Agree ■ Neither agree nor disagree ■ Disagree ■ Don't know



Q14. To what extent, if at all, do you agree or disagree with the following statements?

Over four in ten Mexicans selected the sustainability of their food as one of the top five most important issues to them, a significantly higher proportion than in the EU

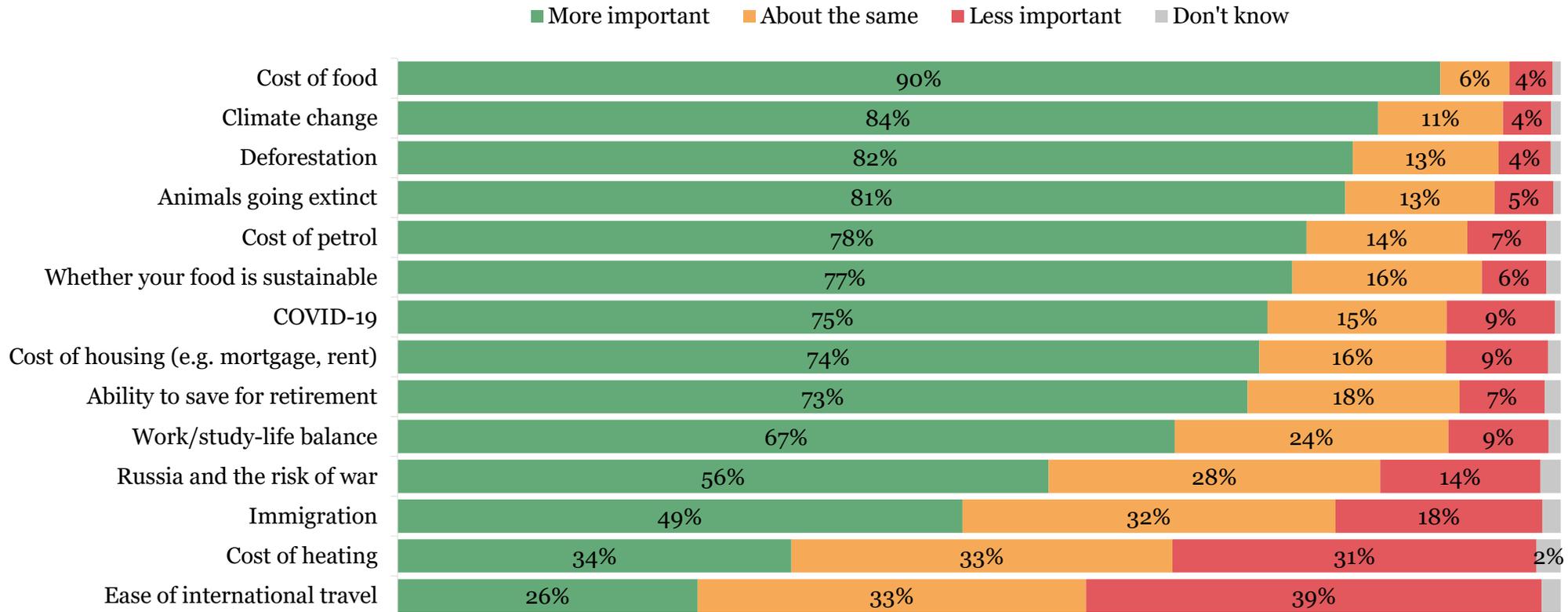
Proportion of Mexican respondents who selected each of the following issues as being one of the top five most important issues to them personally



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

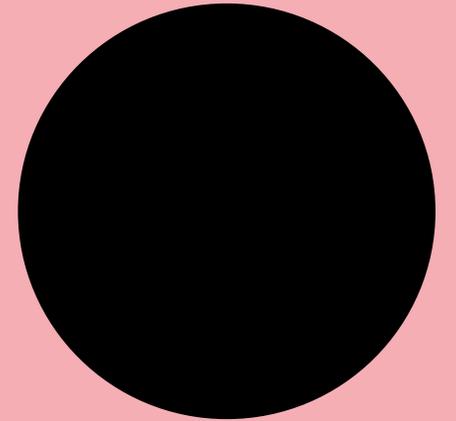
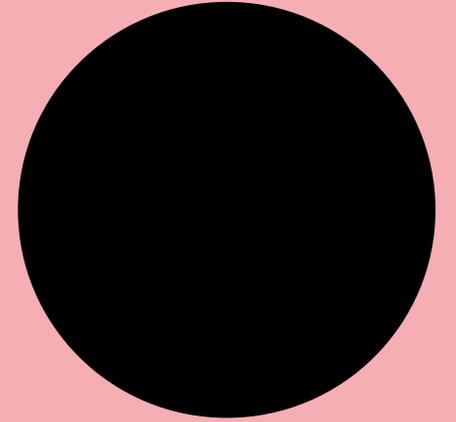
Food sustainability has become more important to almost eight in ten Mexicans in the last 12 months

The proportion of Mexican respondents for whom the importance of the following issues has either grown, fallen, or remained about the same, 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

Appendix Five: Q1-Q11, Change over time in tracked countries

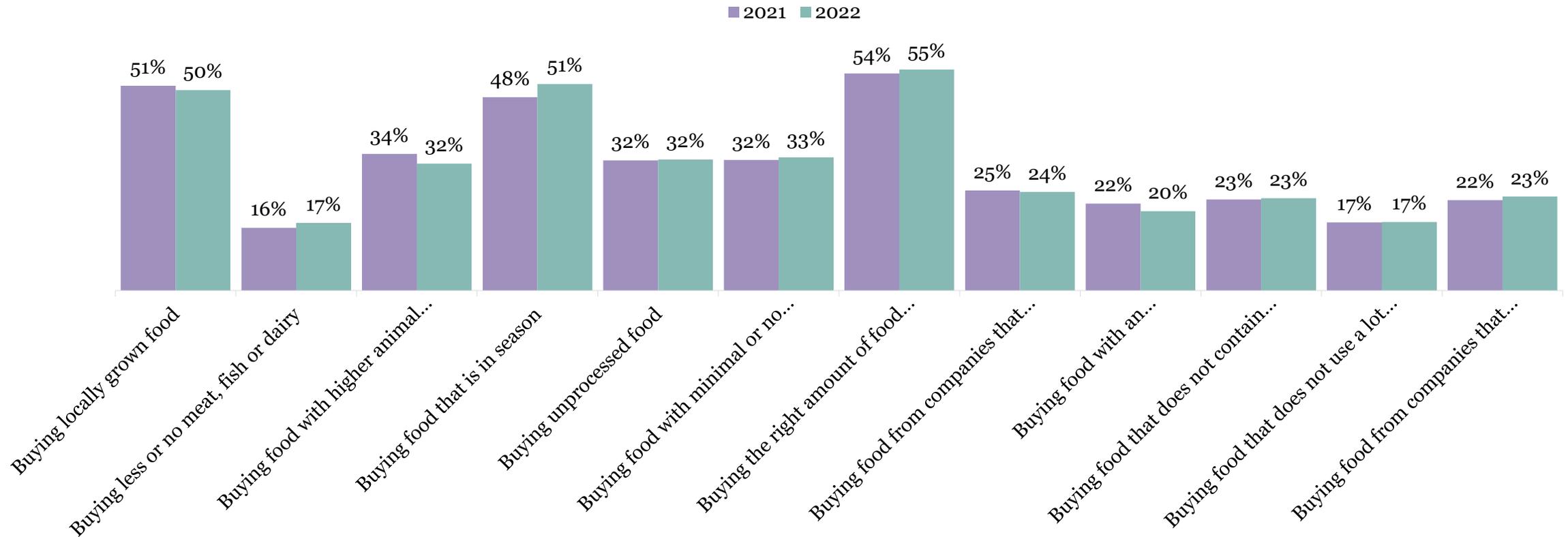


The proportion of respondents in tracked countries who do and do not eat meat in 2021 and 2022



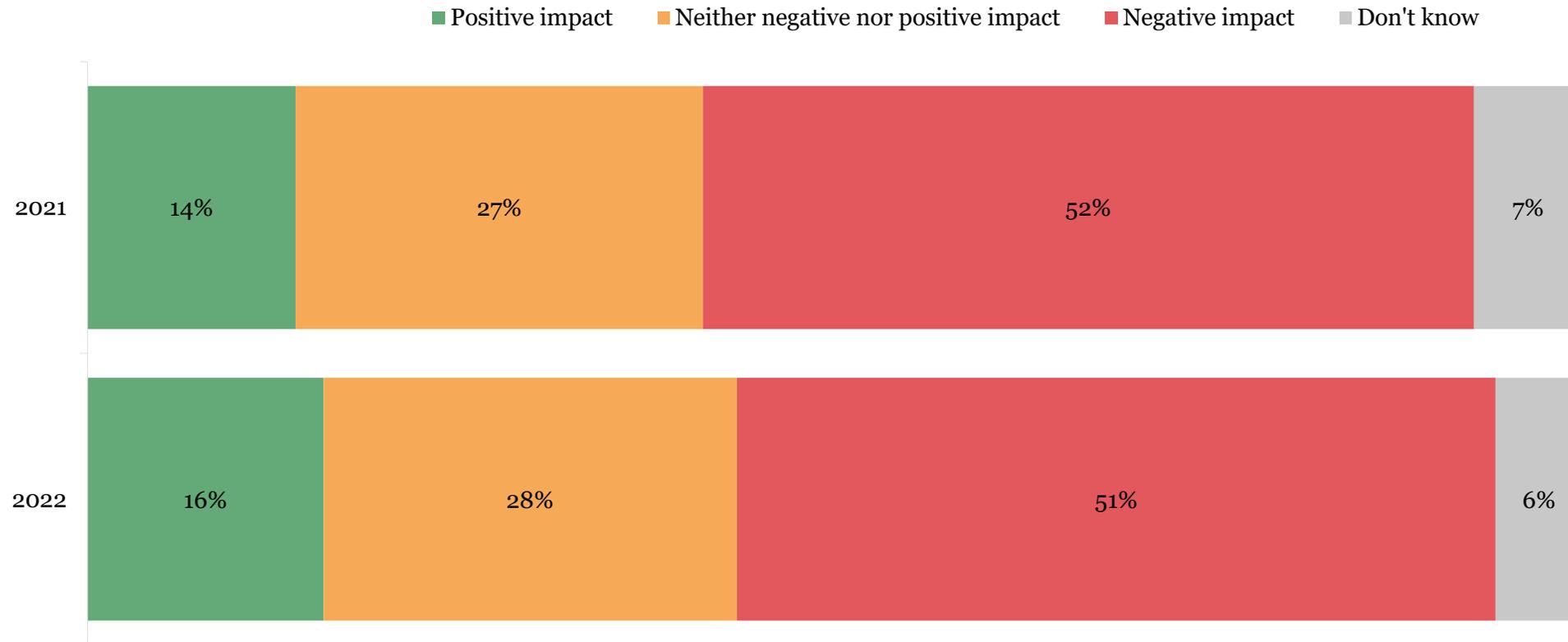
Q1. Do you eat the following foods?

The proportion of respondents in tracked countries for whom the following environmental and ethical considerations were among the five most important to them personally, when choosing what food to buy, in 2021 and 2022



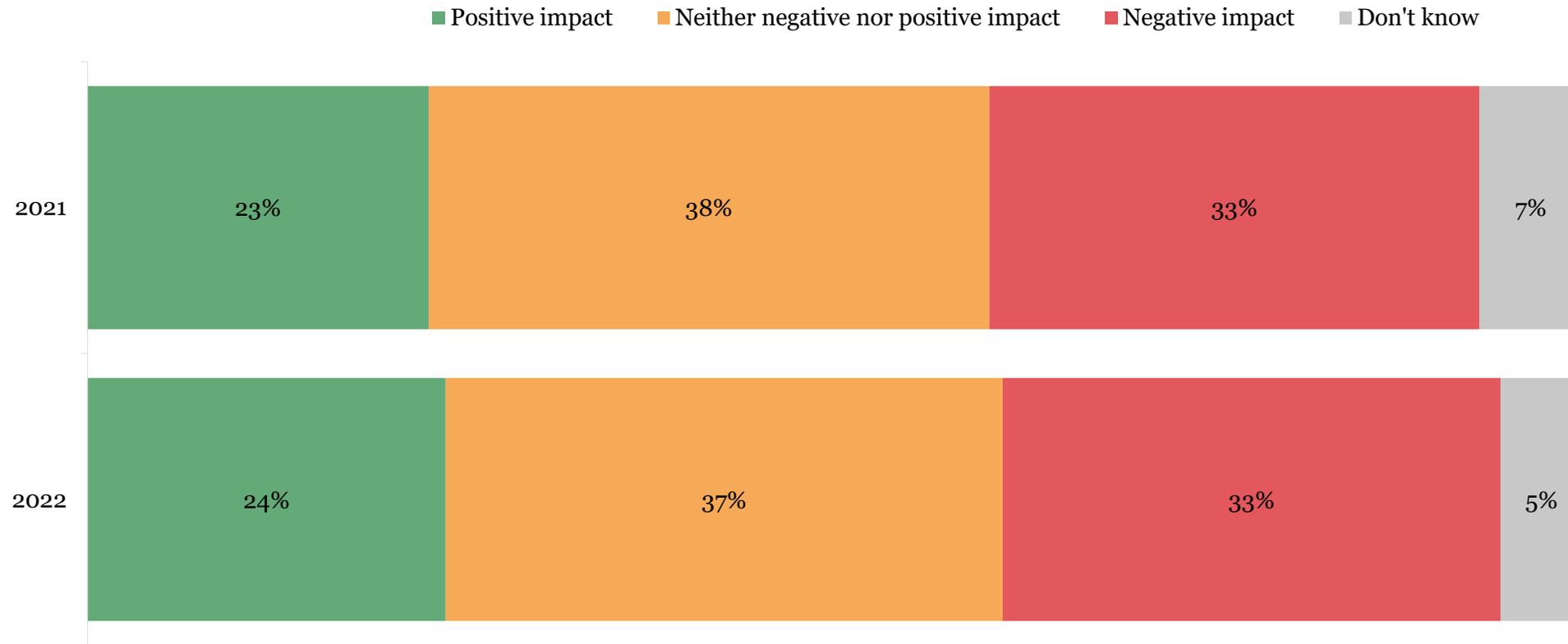
Q2. When choosing the food you buy, which of the following environmental and ethical considerations are most important to you, if any?

The perceived impact in the tracked countries of food produced and consumed by a group the respondent is part of (e.g. "the food we produce and consume") on the environment, in 2021 and 2022



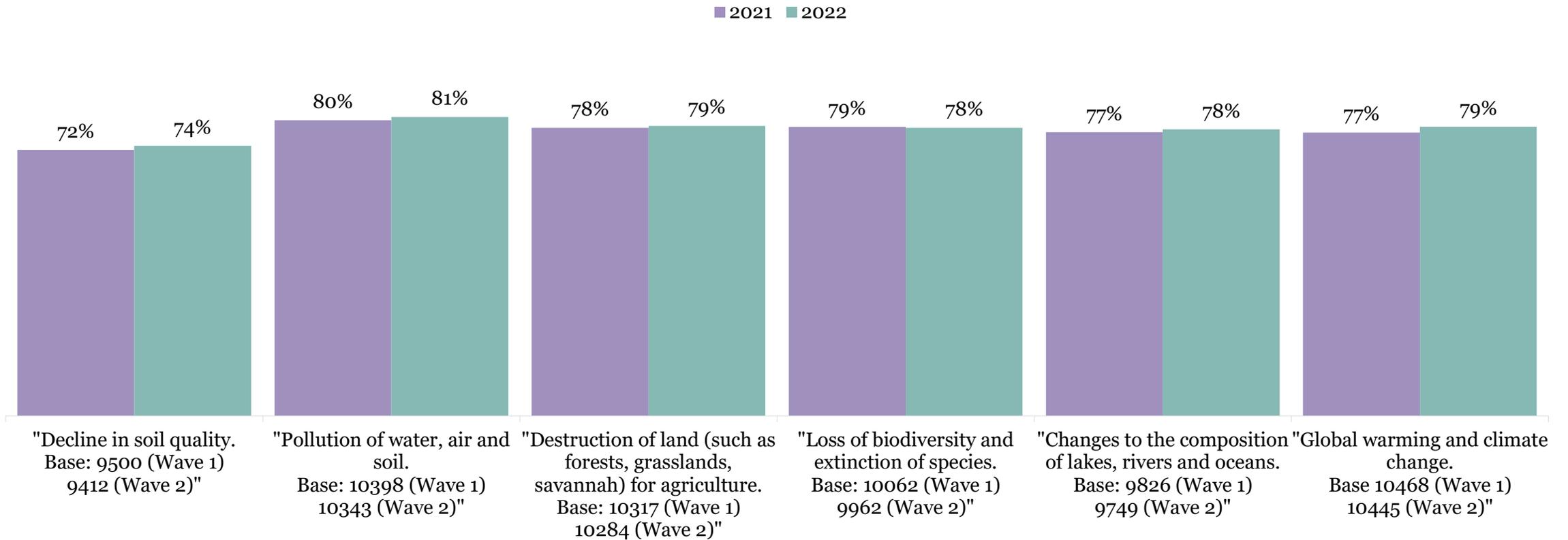
Q3. To what extent, if at all, do you think that the food we produce and consume has a positive or negative impact on the environment?

The perceived impact in the tracked countries of food produced and consumed by the respondent alone on the environment, in 2021 and 2022



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?

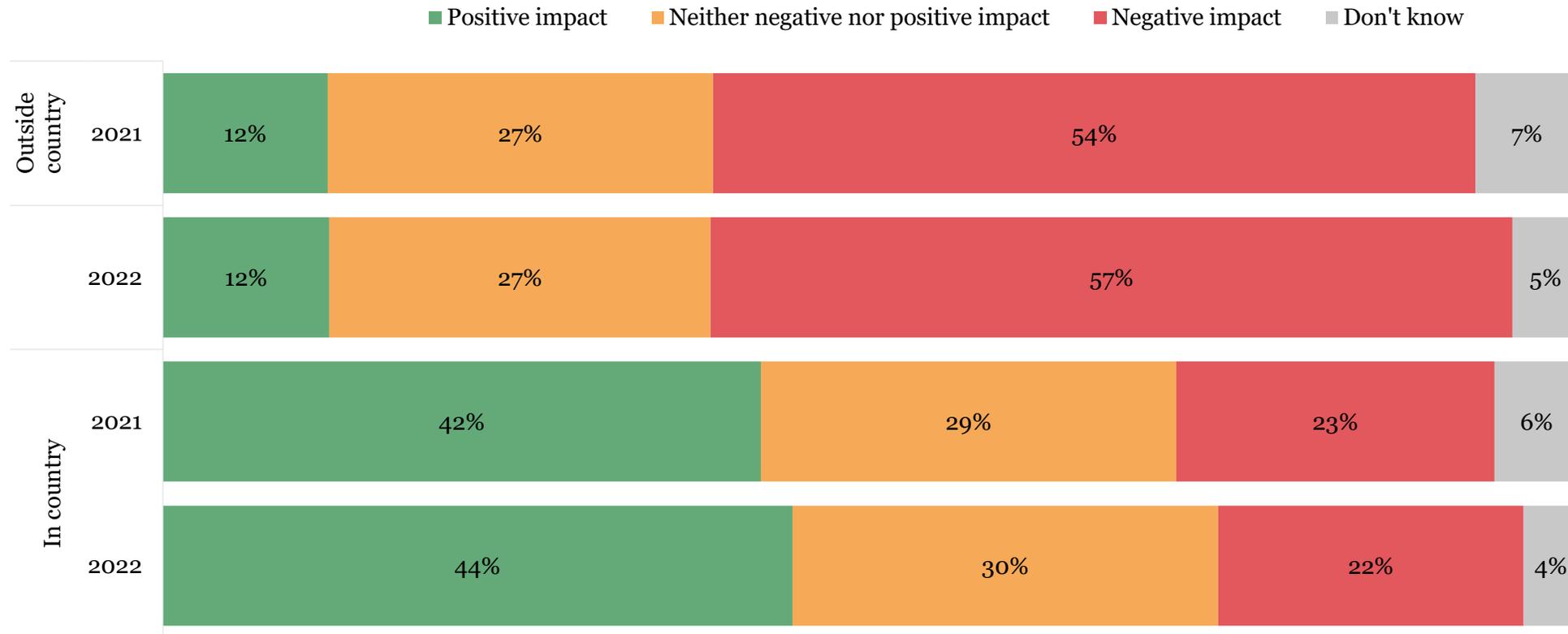
The proportion of respondents in tracked countries who knew at least a little and were concerned about the following environmental impacts caused by the food they and their group ("we") produce and consume on a large scale, in 2021 and 2022



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?

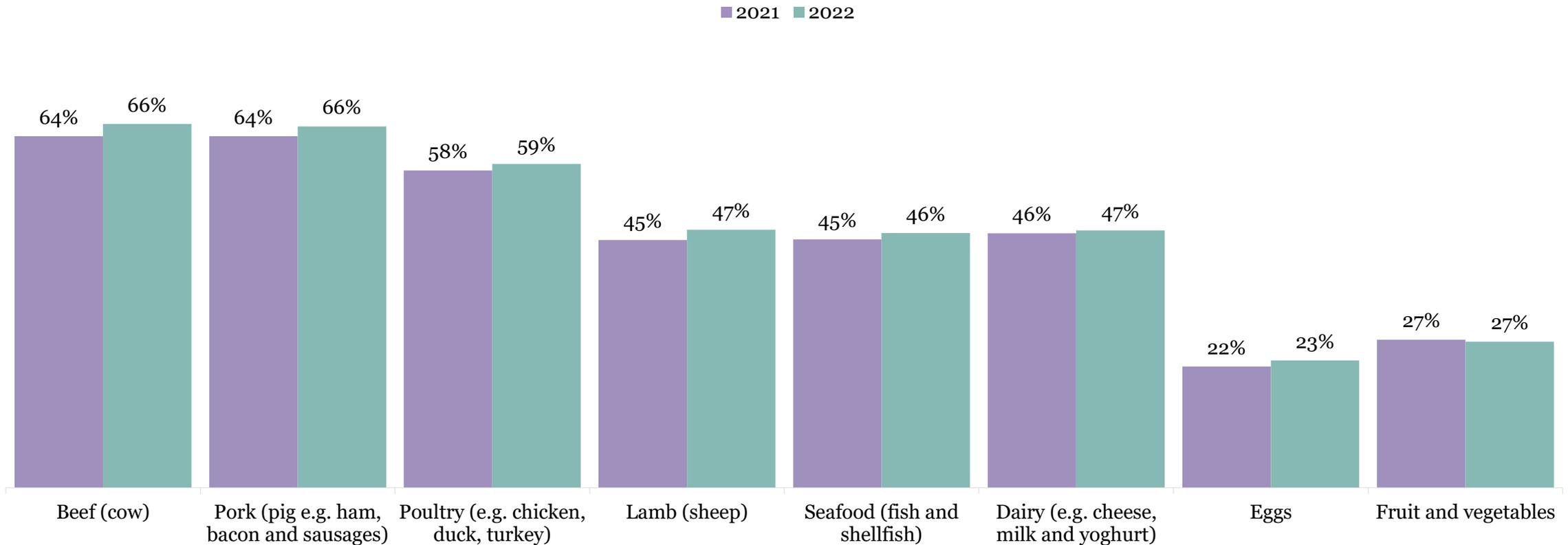
89 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK, and know at least a little about the following issues, in 2021 and 2022

Perceived environmental impact of food, based on where it is produced, in tracked countries 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?

The proportion of respondents in the tracked countries who thought each of the following has the biggest negative impact on the environment, in 2021 and 2022



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

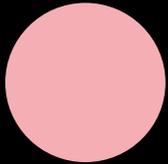
91 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden or the UK, 2021 (11,439), 2022 (11,215)

The proportion of respondents in the tracked countries who were confident/unconfident in their knowledge of how to buy and eat more environmentally friendly and sustainable food, in 2021 and 2022



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

Thank you



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