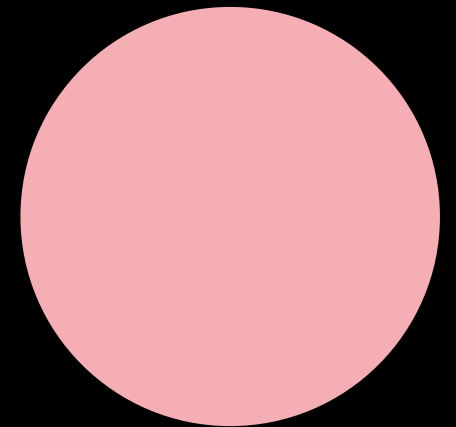


WWF Food Habits Survey 2023



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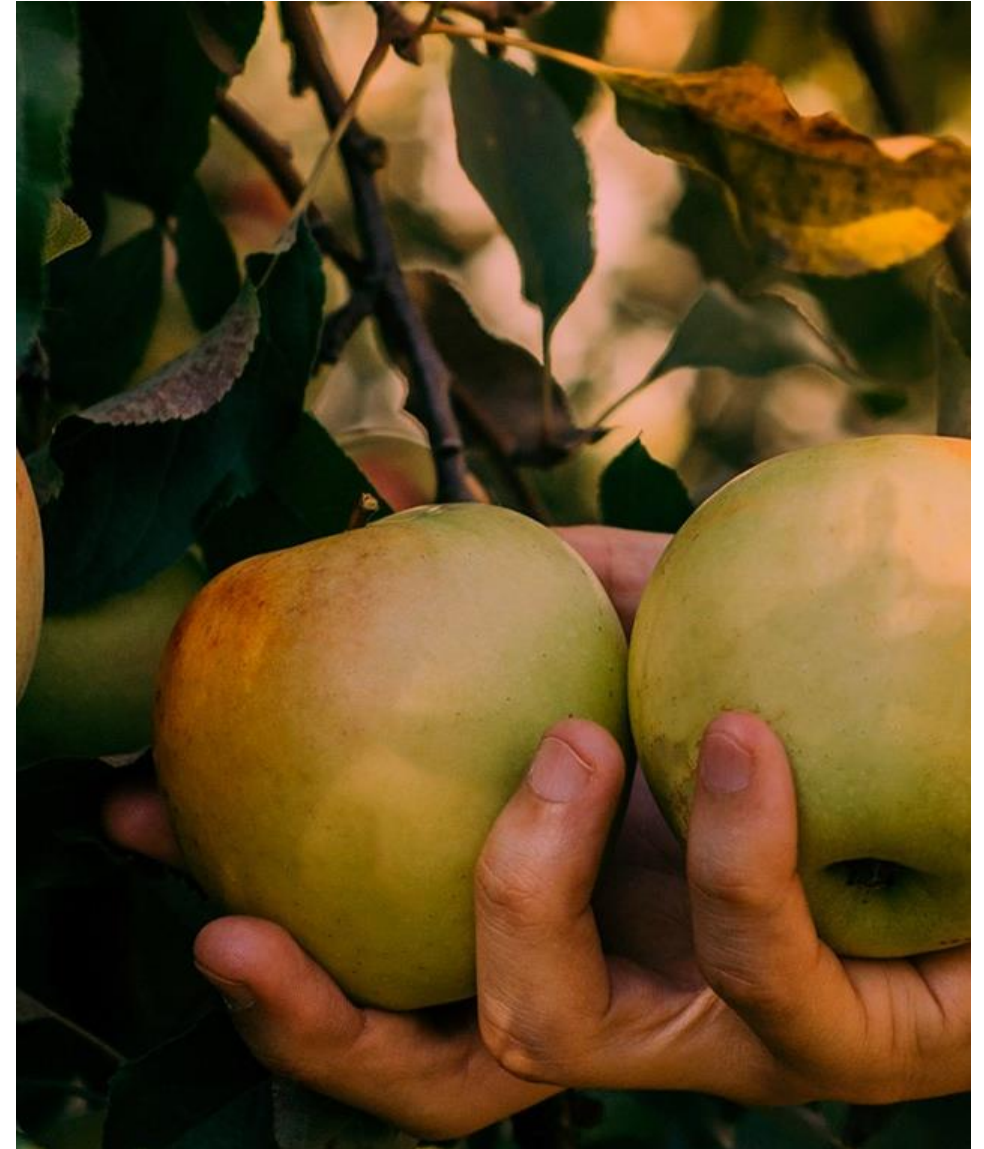
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Background and objectives

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.

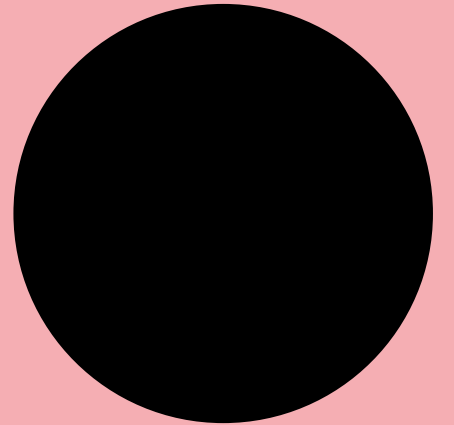
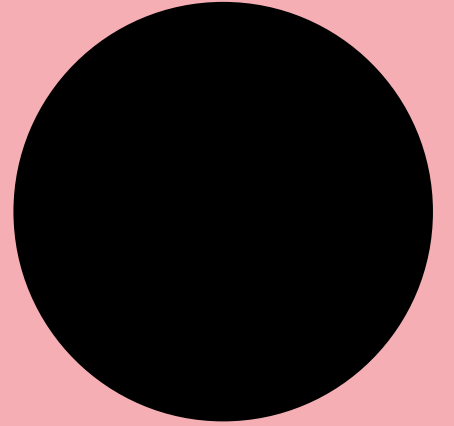
Data were weighted per country by age, gender and region to be nationally representative by country. All countries were weighted to be equally represented in the combined Wave 3 and Wave-on-Wave tables.

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

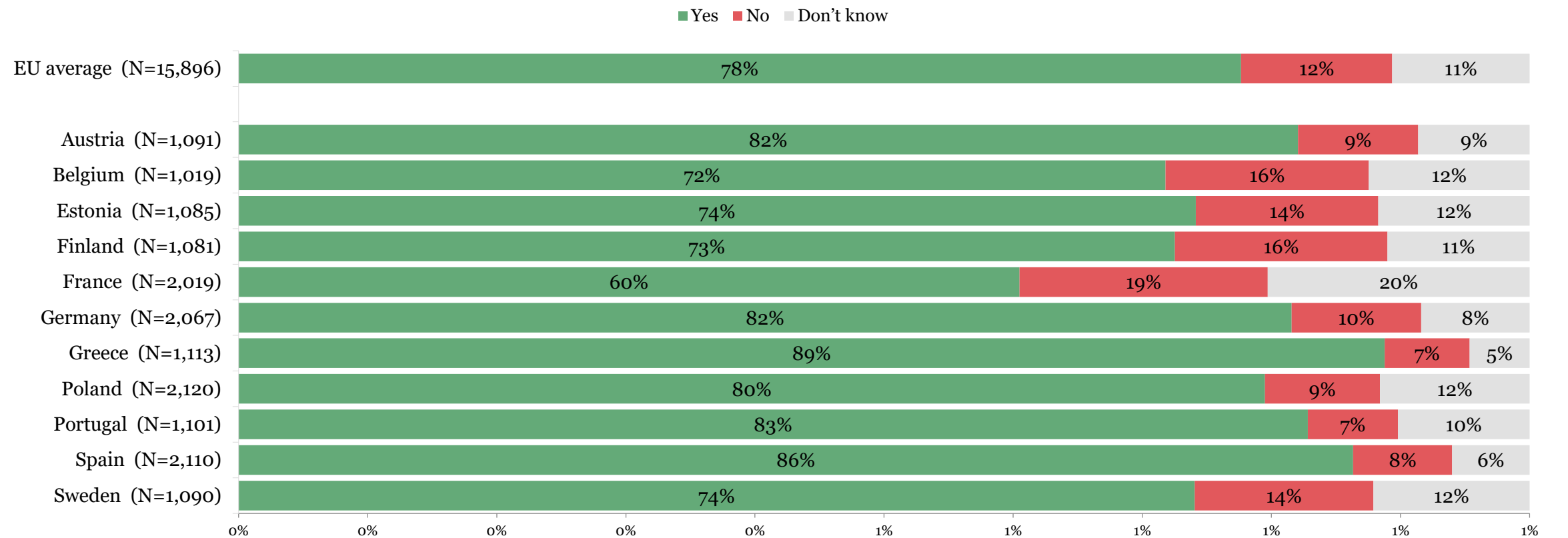


Executive Summary

- 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 (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.
- An equal proportion of EU respondents believe that in future sustainable food should cost the same as unsustainable food (39%), as believe it should cost less than unsustainable food (38%).
- 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.

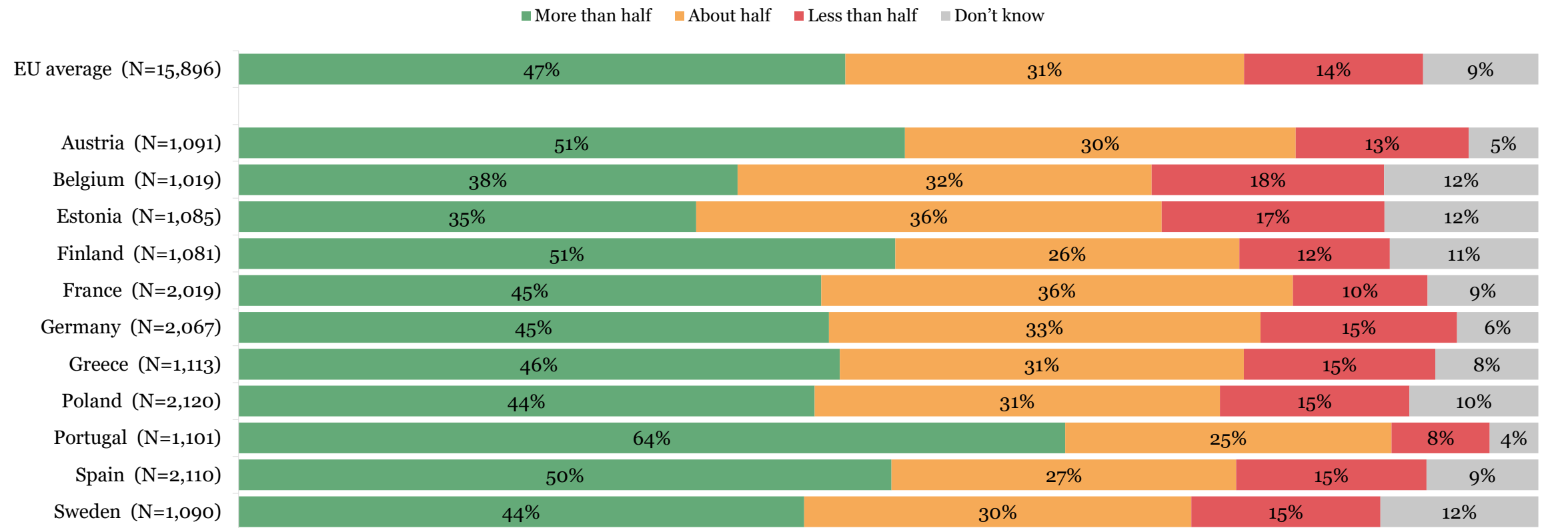
A majority of respondents in every EU country surveyed agree that public sector canteens in the EU should always provide at least one plant-based option

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



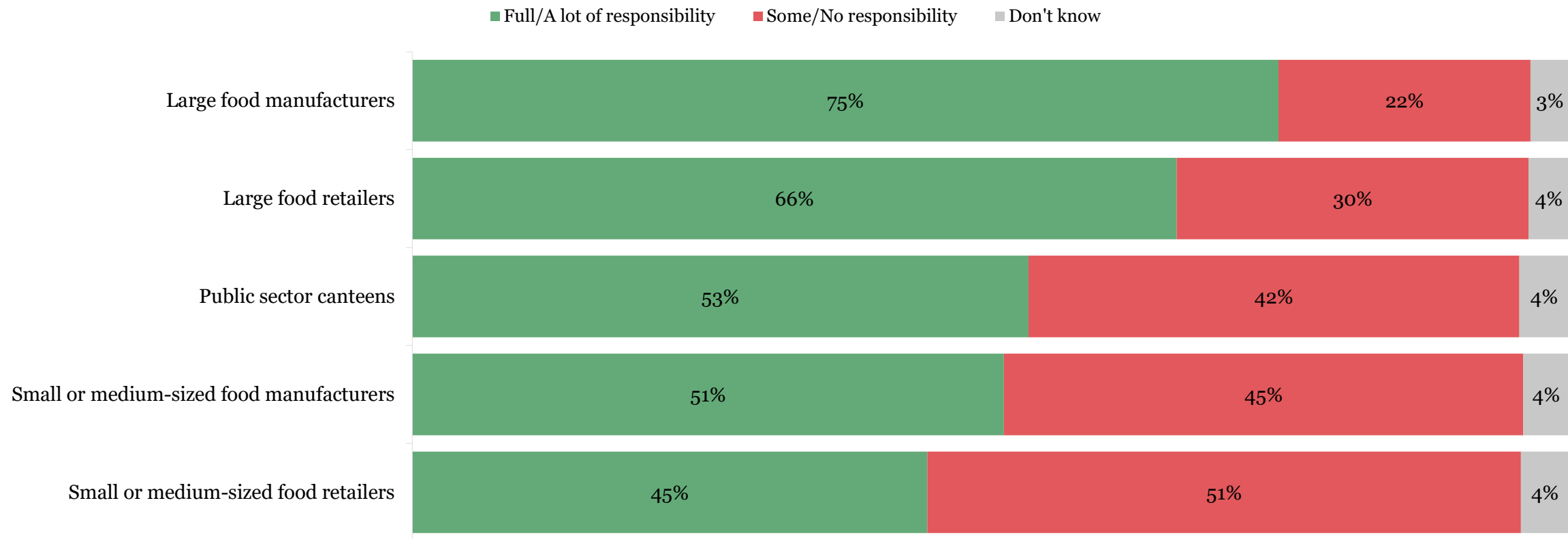
Just under half of EU respondents say that public sector canteens should ensure that more than half of the food they serve each day should be sustainably produced

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



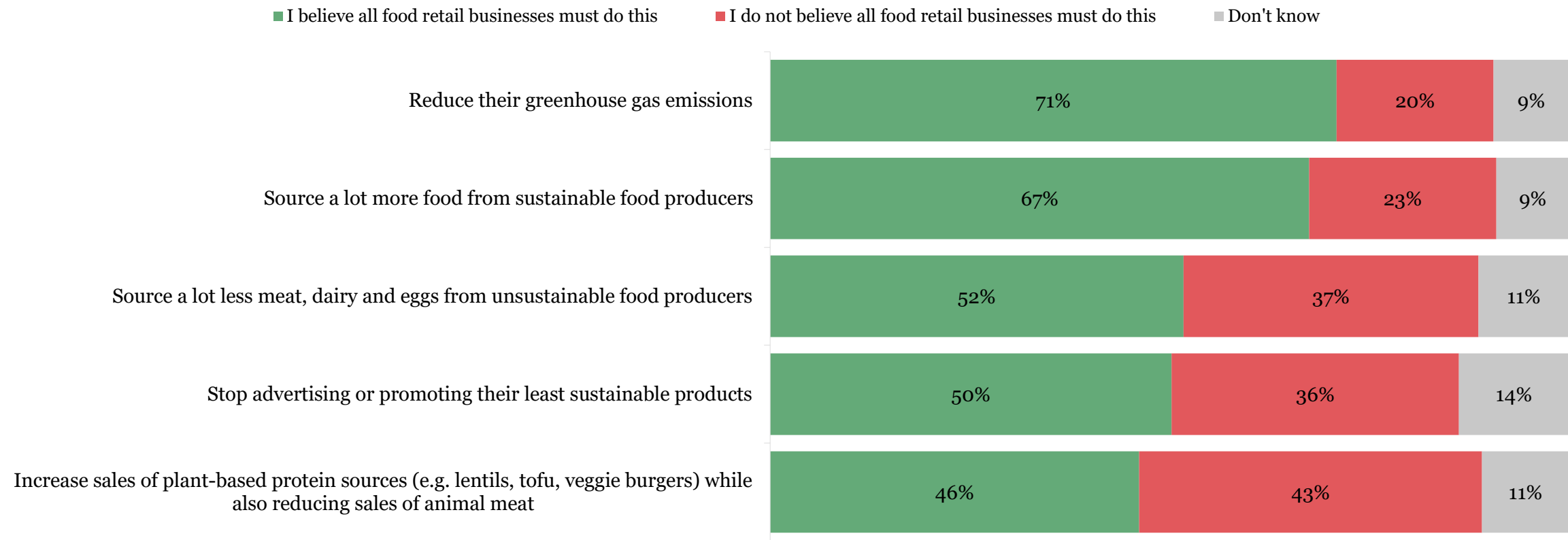
EU respondents are most likely to say that large manufacturers have full/a lot of responsibility for ensuring the food they sell was produced sustainably

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



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).

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



11 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

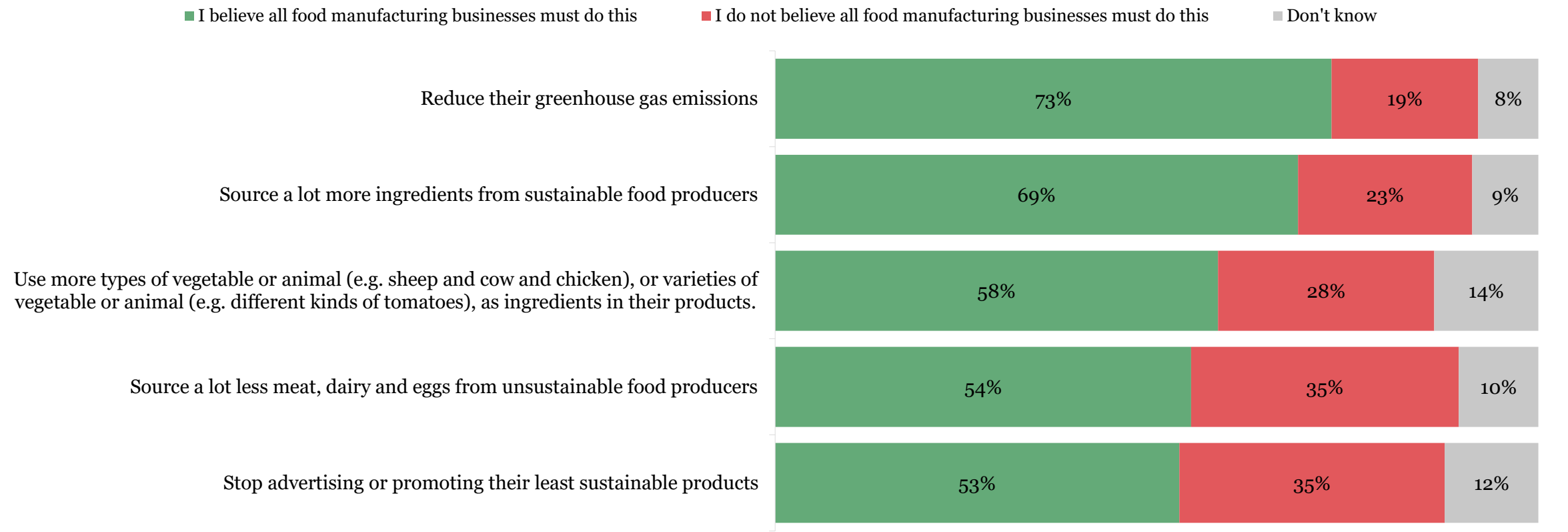
Greek and Spanish respondents are more likely than those in every other country to say that food retail businesses must increase sales of plant-based protein sources, while also reducing sales of animal meat

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



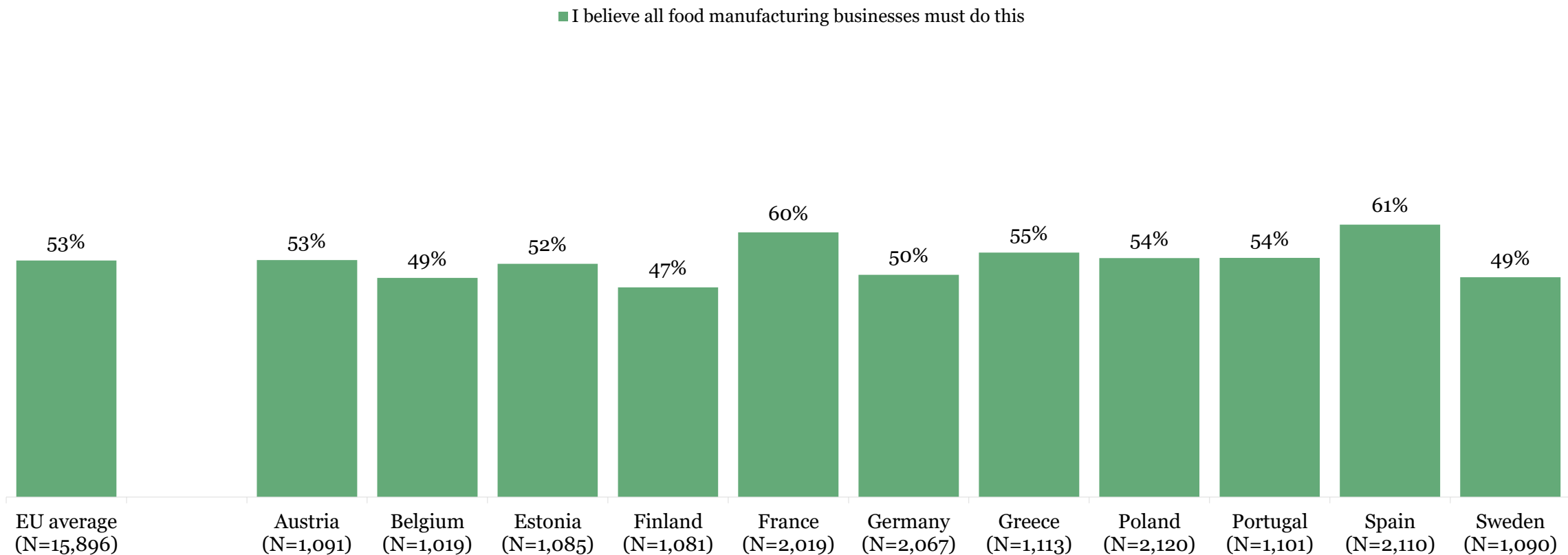
Of the options presented, EU respondents were most likely to say food manufacturing businesses must reduce their greenhouse gas emissions

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



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



Q16W3. Stop advertising or promoting their least sustainable products: Which of the following do you believe all food manufacturing businesses (e.g. multinational and local makers of canned food and snack food, as well as butchers and bakeries) must do, if they are to produce and/or sell food within the EU?
14 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal, Sweden, Germany, Spain or Poland

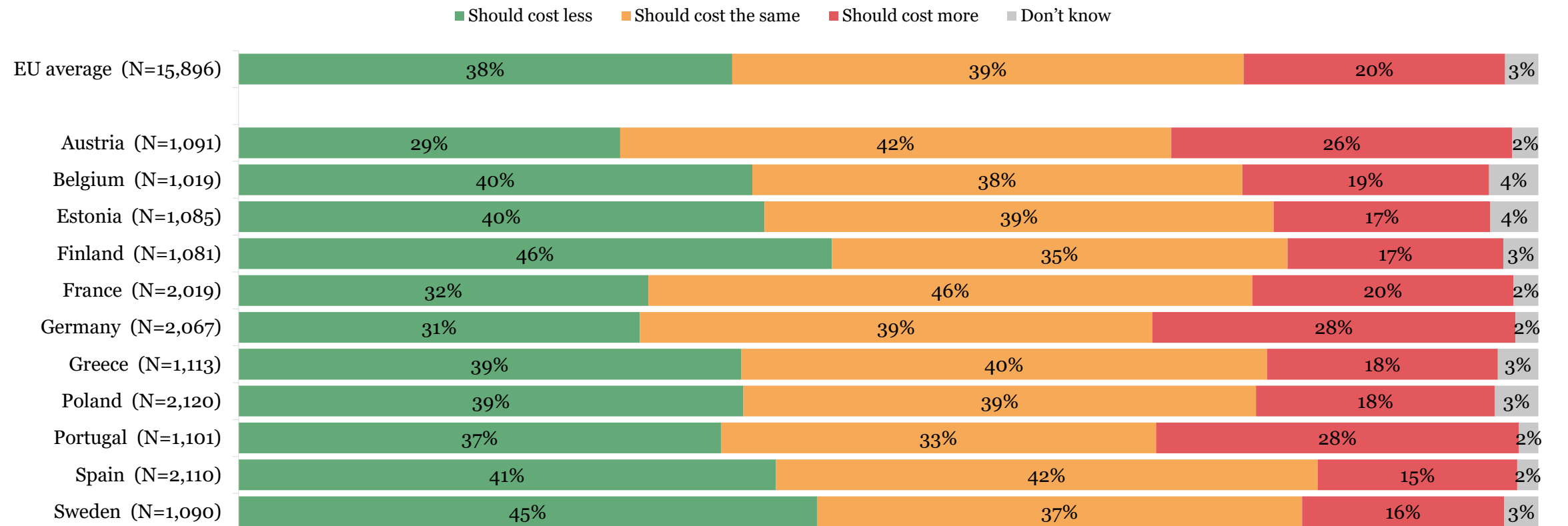
Spanish respondents are more likely than those in every other country to say food manufacturing businesses must use more types of vegetable or animal (e.g. sheep and cow and chicken), or varieties of vegetable or animal (e.g. different kinds of tomatoes), as ingredients in their products.

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



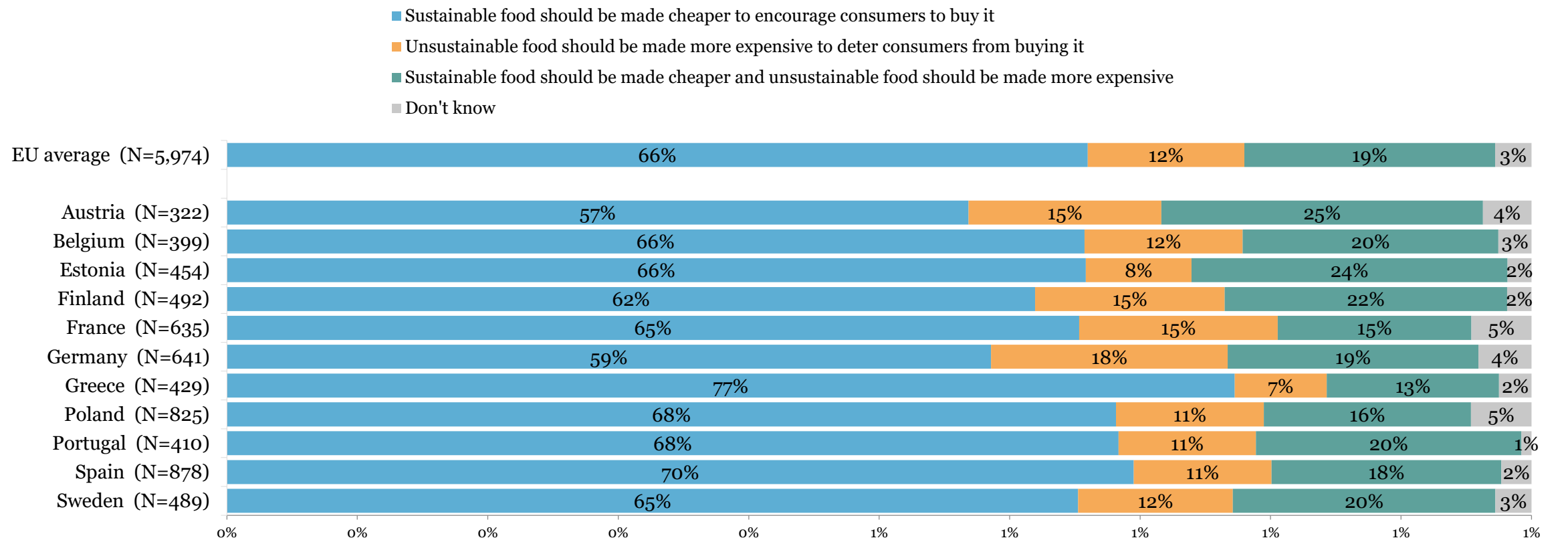
An equal proportion of EU respondents believe that in future sustainable food should cost the same as unsustainable food, as believe it should cost less than unsustainable food.

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

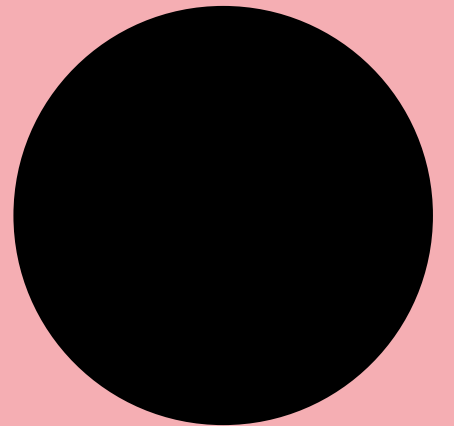
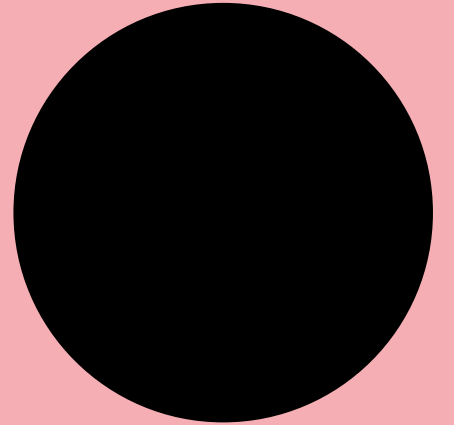


Of those EU respondents who believe that in future sustainable food should be cheaper than unsustainable food, two thirds believe that this should be achieved by making sustainable food cheaper to encourage consumers to buy it

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).

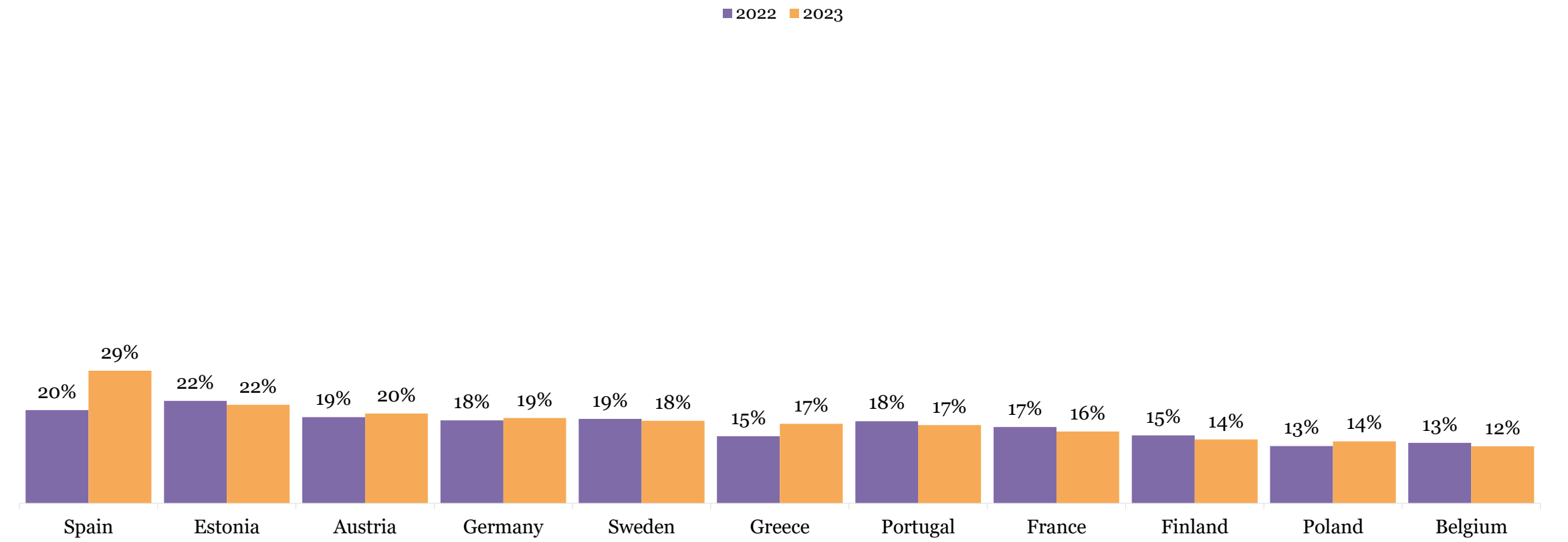
While concern about the cost of food and housing has increased, there has been no significant change in the likelihood of Europeans to select climate change or food sustainability as one of their top five most important issues

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



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

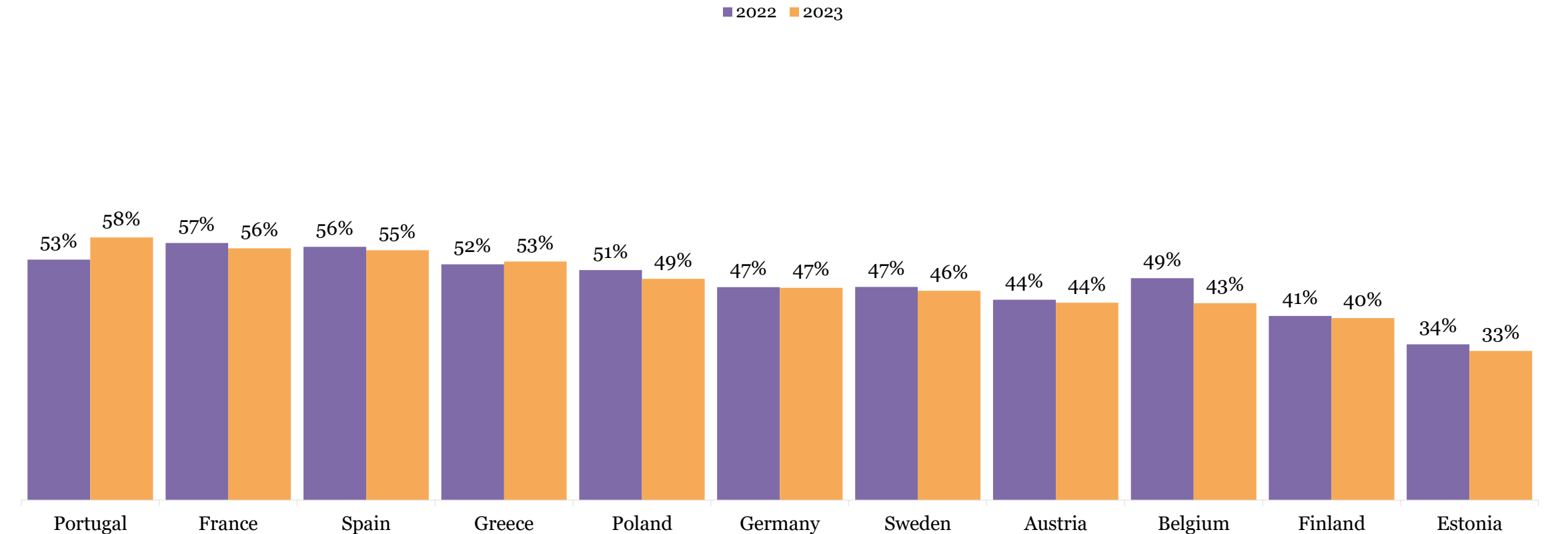


Q18. Whether your food is sustainable: Which of the following do you see as the top five most important issues for you personally?

²¹ 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, n=1000; 2023, n=1000).

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

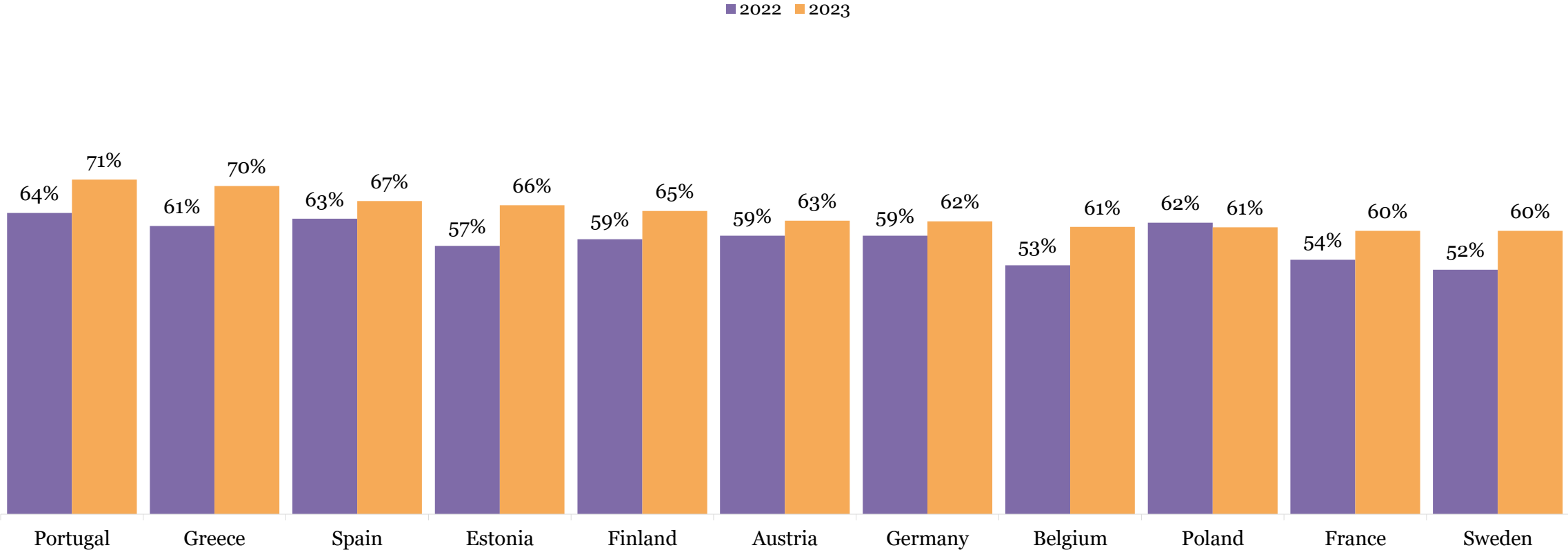


Q18. Climate change: Which of the following do you see as the top five most important issues for you personally?

22 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, n=2022; 2023, n=2122).

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

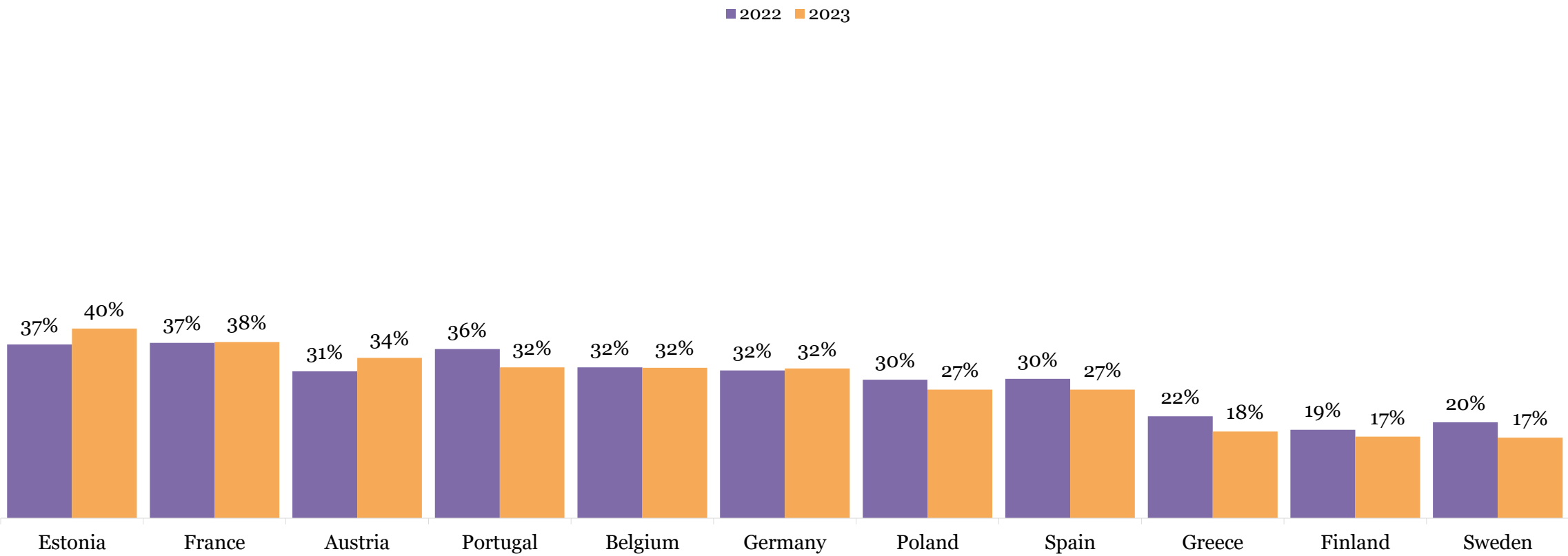


Q18. Cost of food: Which of the following do you see as the top five most important issues for you personally?

23 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, n=2022; 2023, n=2122).

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

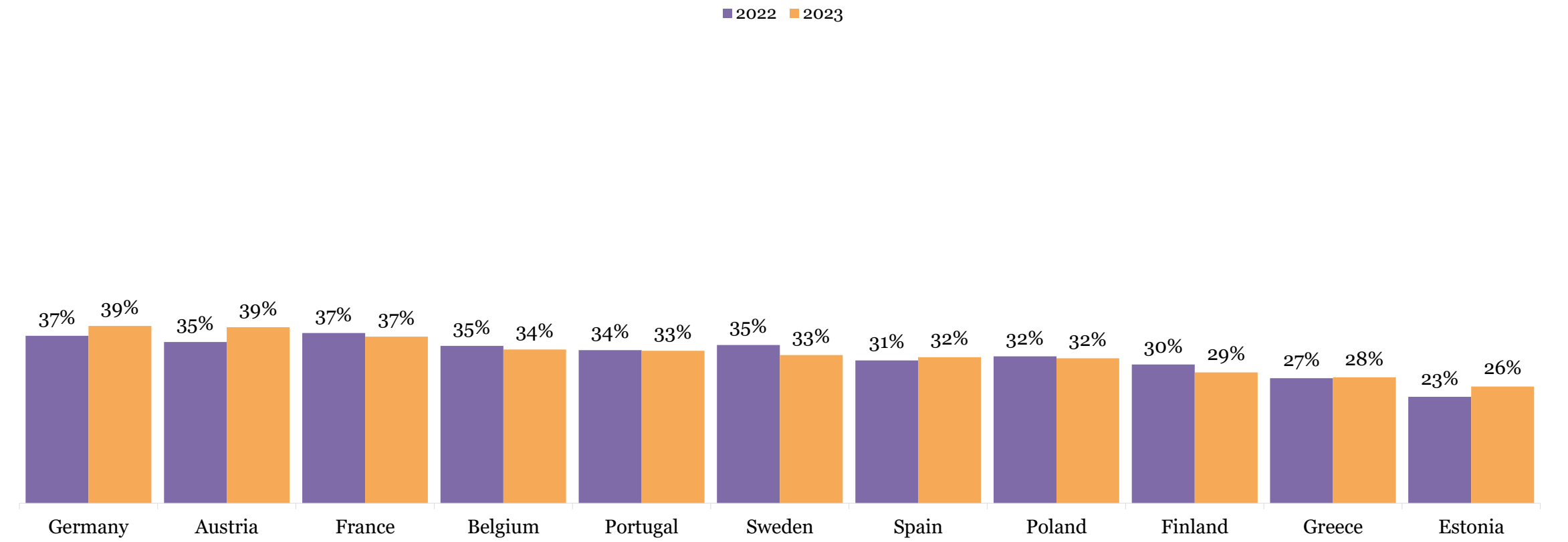


Q18. Deforestation: Which of the following do you see as the top five most important issues for you personally?

24 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, n=2023; 2023, n=2122)

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

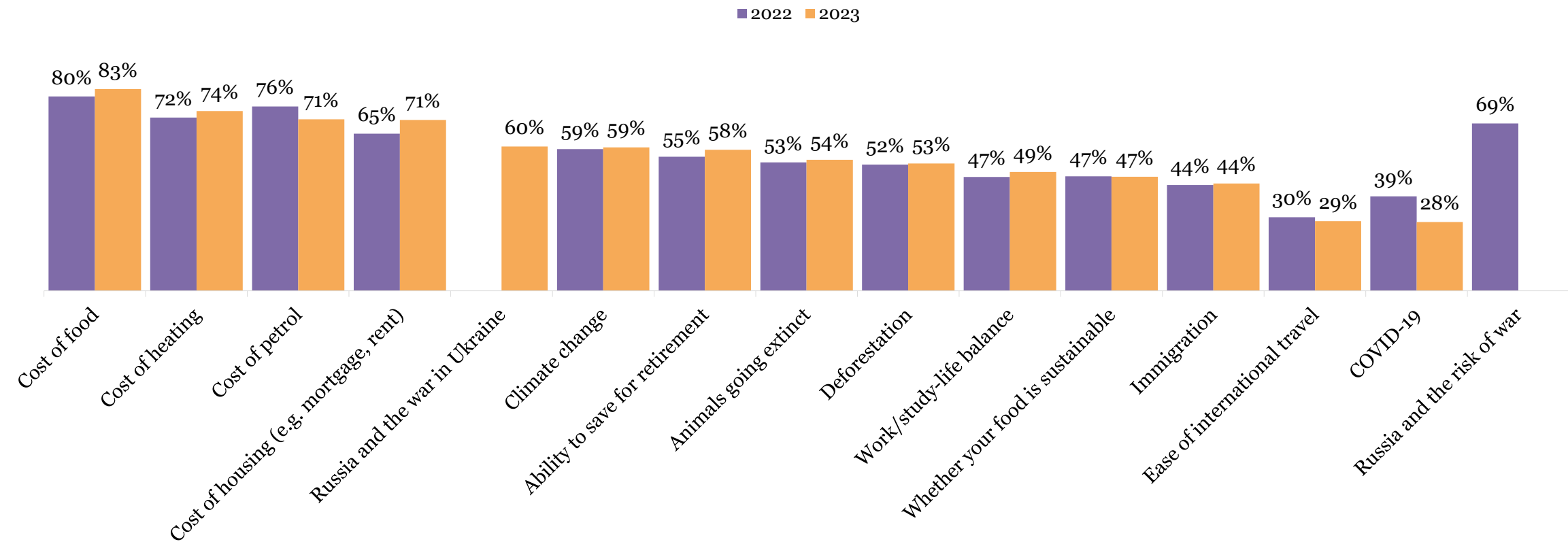


Q18. Animals going extinct: Which of the following do you see as the top five most important issues for you personally?

25 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, n=2022; 2023, n=2122).

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

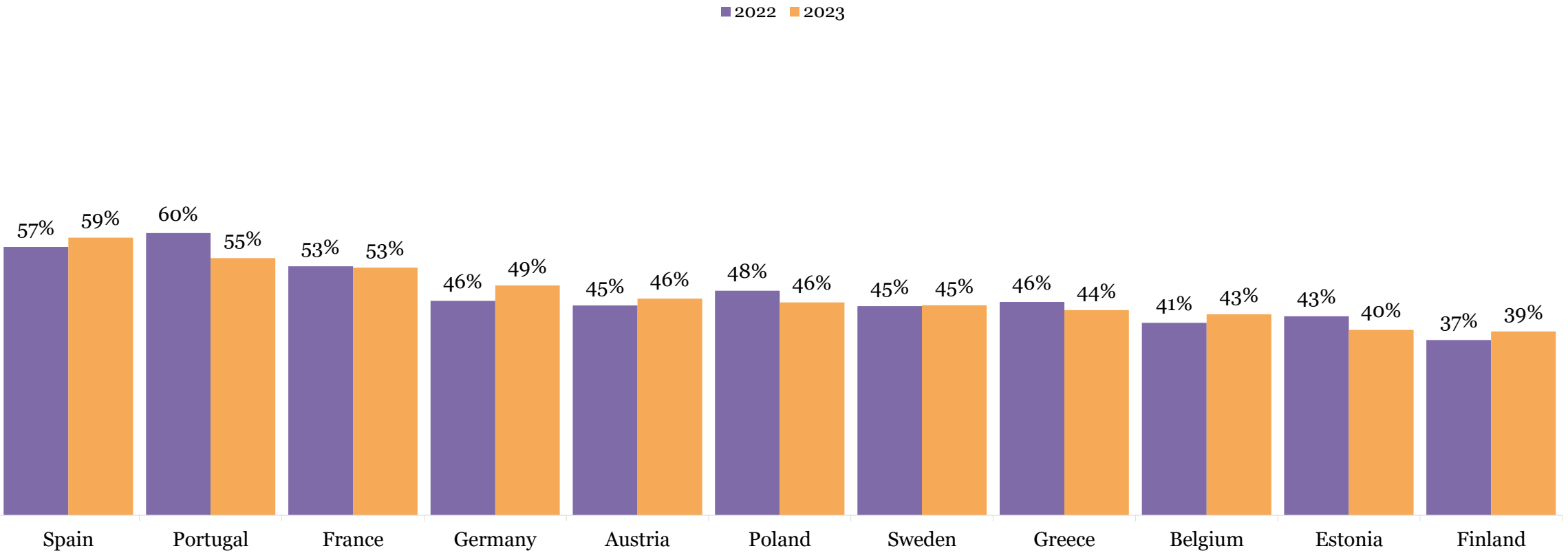


Q19. Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

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).

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



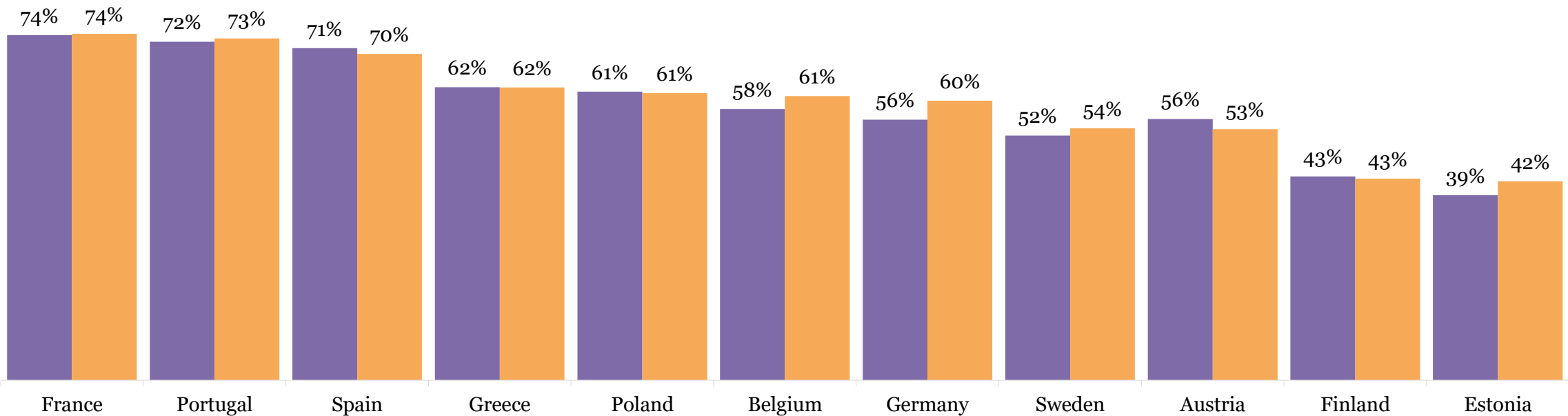
Q19. Whether your food is sustainable: Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

27 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, n=2022; 2023, n=2122)

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

■ 2022 ■ 2023

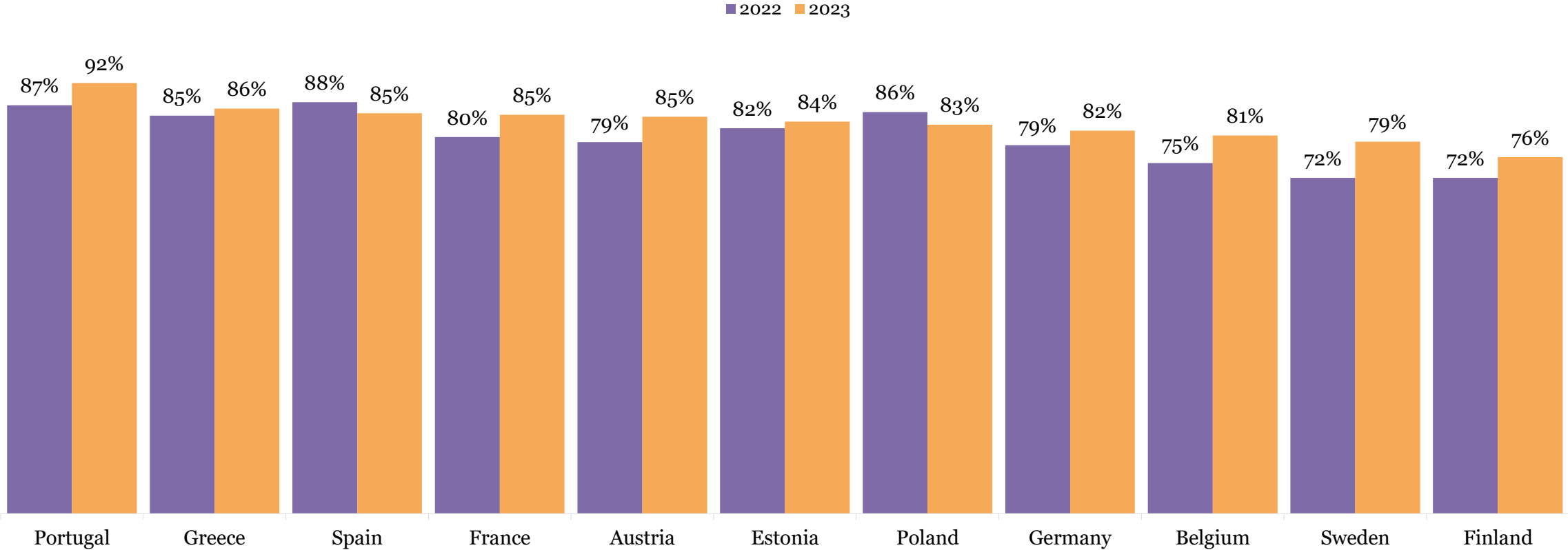


Q19. Climate change: Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

28 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, n=2002; 2023, n=2122)

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

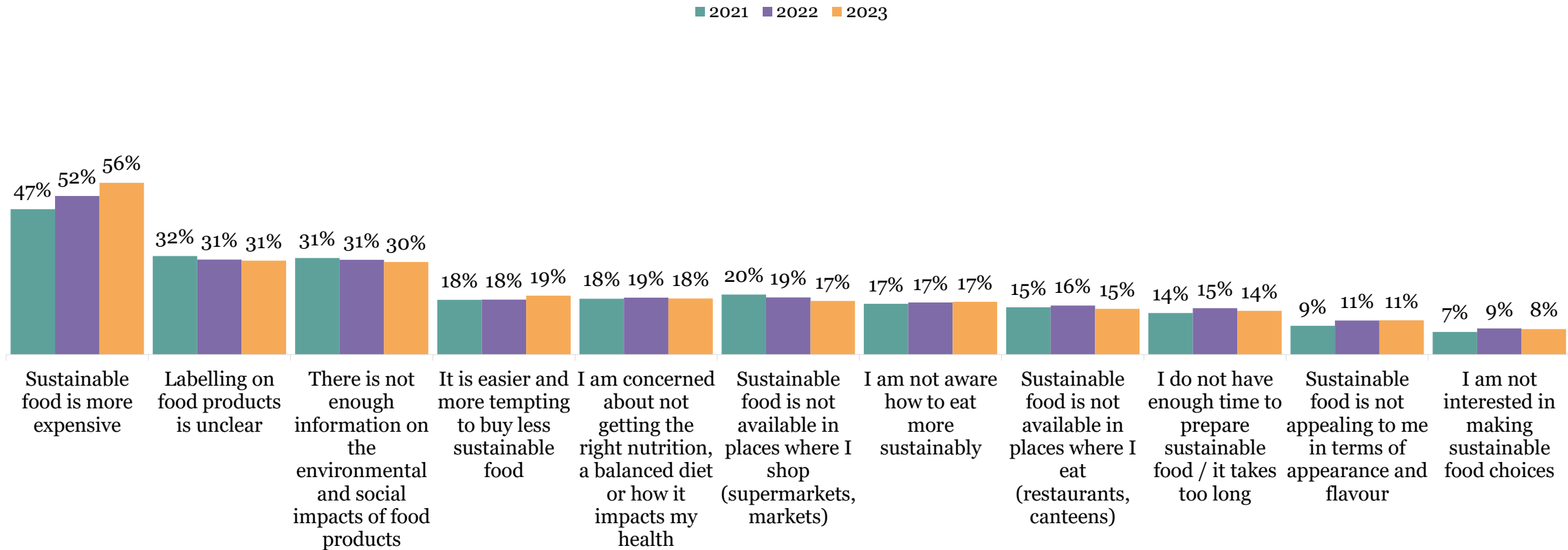


Q19. Cost of food. Have any of the following issues become more important, less important, or neither, to you personally, over the last 12 months

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, n=2022; 2023, n=2122)

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

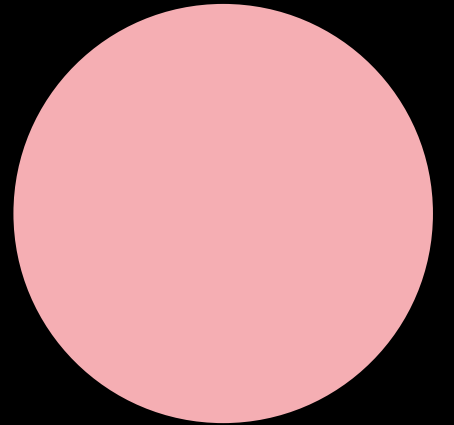
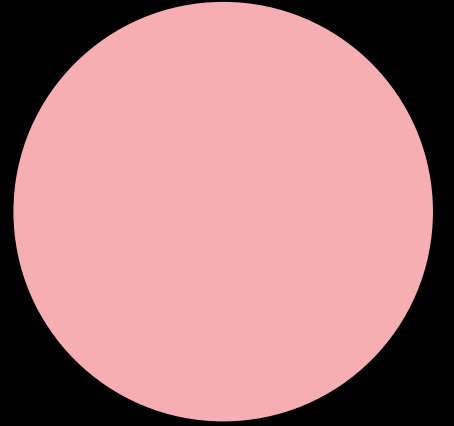
The proportion of respondents in EU countries surveyed in 2021-2023 who selected each of the following factors as something that prevents or stops them from eating types of food that are better for the environment and more sustainable



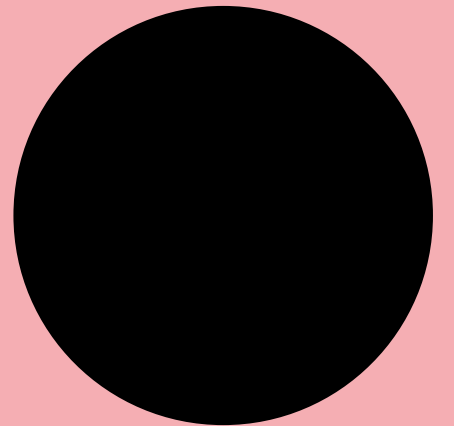
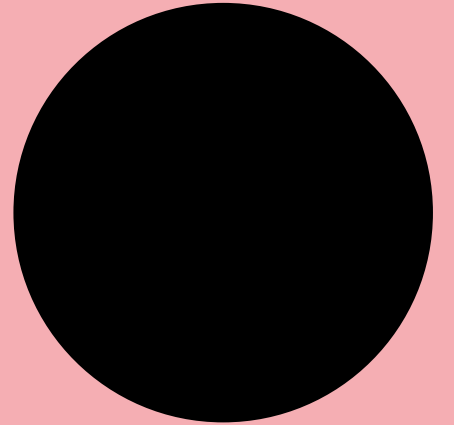
Q11. Which of the following, if any, prevents or stops you from eating types of food that are better for the environment and are more sustainable?

30 Base: Those aged 18-65 who live in Austria, Belgium, Estonia, Finland, France, Greece, Portugal or Sweden: 2021 (n=9376), 2022 (n=9200), 2023 (n=9599)

Appendix

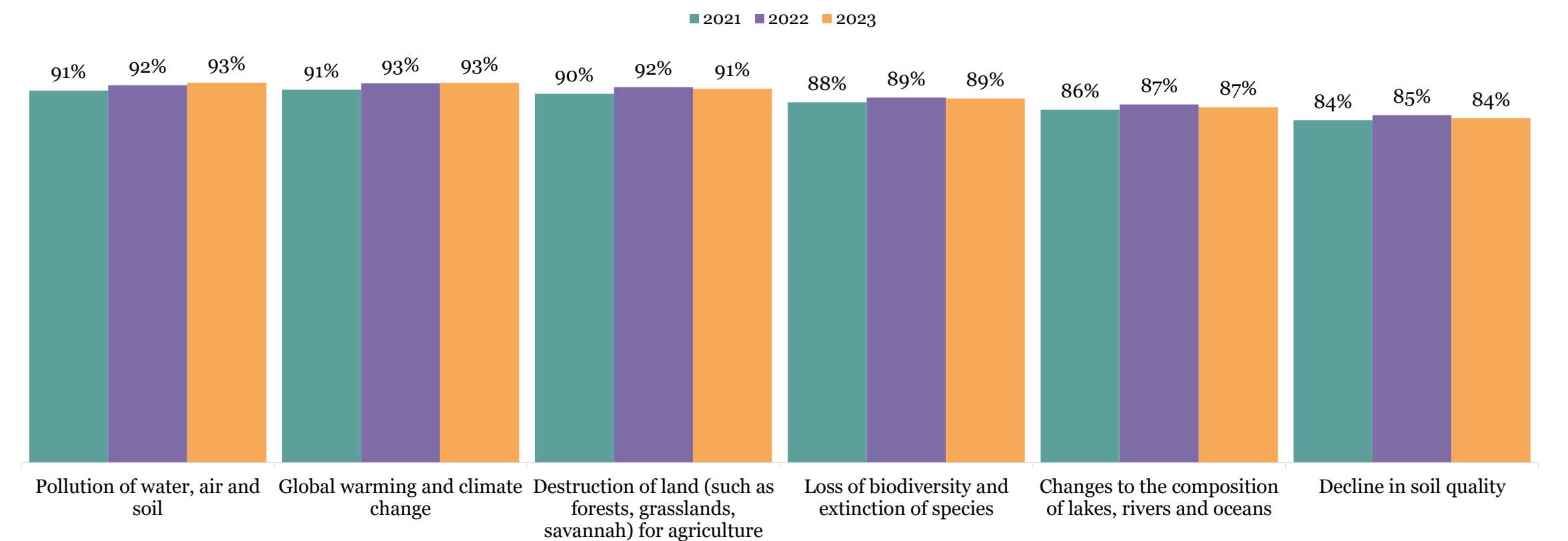


Appendix One: Public Interest in Sustainable Food in the EU



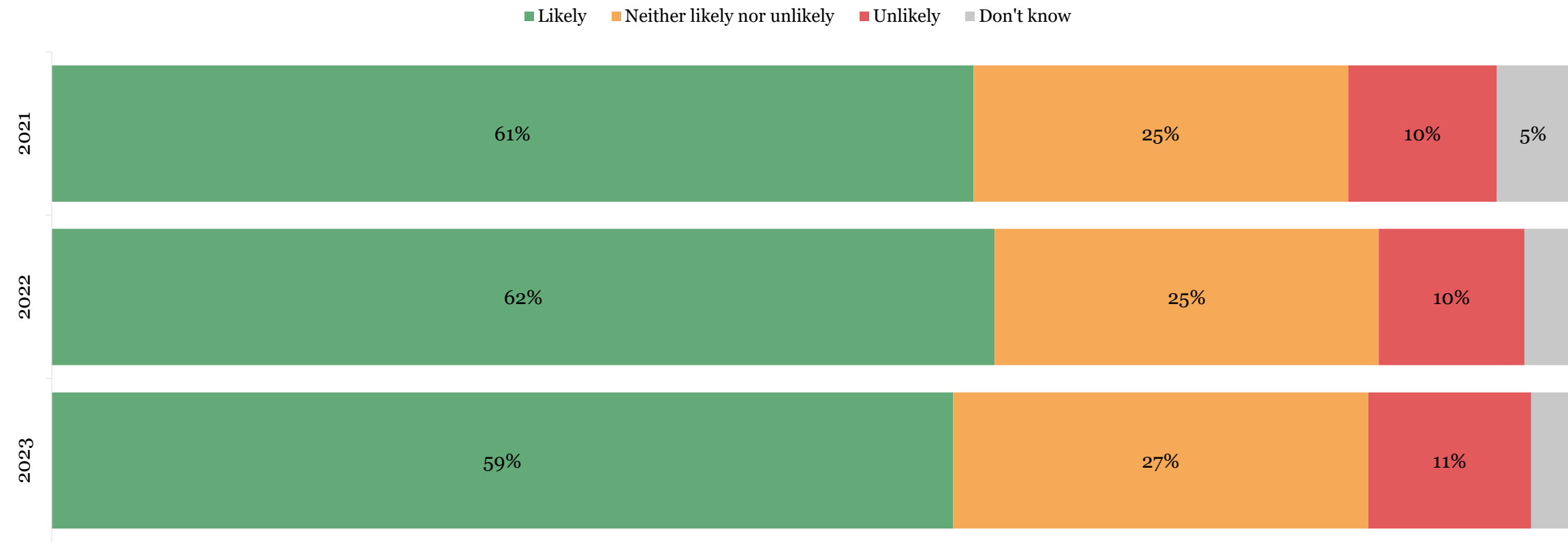
The proportion of respondents in countries tracked since 2021 who claim to know at least a little about the following environmental impacts of food has remained constant

The level of knowledge respondents in tracked countries had about each of the following environmental impacts of food in 2021 and 2022



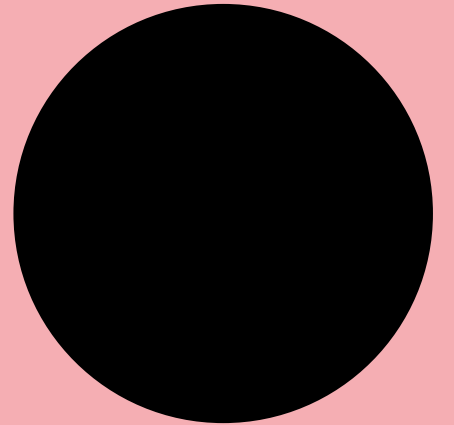
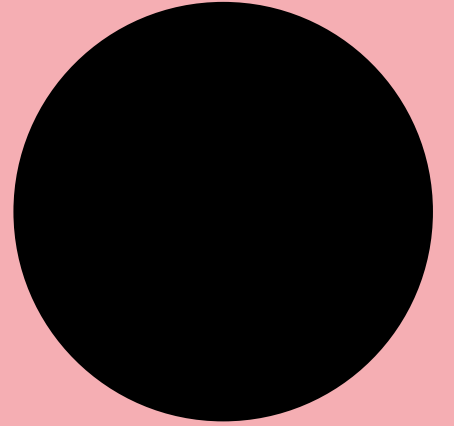
Taken as a whole, the likelihood of respondents buying and eating sustainable food has remained consistent over time in the countries tracked since 2021

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 Three: 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*

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*

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*

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*

Executive Summary – Estonia key standouts (1)

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*

Executive Summary – Estonia key standouts (2)

- Estonians are more likely than all other countries (except Poland) to select Russia and the war in Ukraine as one of their top three most important issues (**37%** vs. all-country average of 24%)
- Estonians are more likely than average to say that Russia and the war in Ukraine has become **more important** to them over the last 12 months (**67%** vs. 59%). They are also more likely than all other countries (except Austria) to say COVID-19 (**53%** vs 42%) had become **less important** to them over the last 12 months, and more likely than all other countries (except Finland) to say the same about climate change (**15%** vs. 11%)

** All country average, 2023*

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*

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%), the cost of petrol (**34%** vs. 25%), and Russia and the war in Ukraine (**33%** vs. 24%) 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*

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*

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*

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*

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%)
 - Russia and the war in Ukraine (**72%** vs. 59%)
 - Work/study-life balance (**67%** vs. 49%)

** All country average, 2023*

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%) and Russia and the war in Ukraine (**29%** vs 24%) 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*

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 the following issues have become **less important** to them in the last 12 months:
 - COVID-19 (**47%** vs. 42%)
 - Russia and the war in Ukraine (2023) (**18%** vs 14%)

** All country average, 2023*

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*

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*

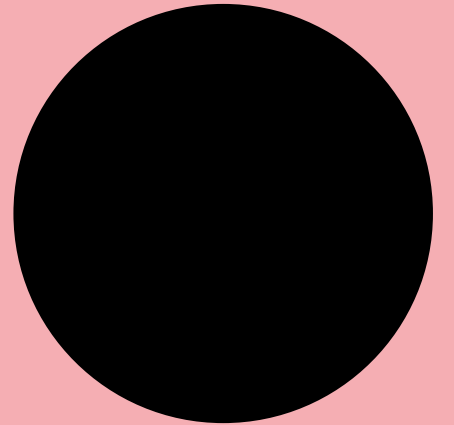
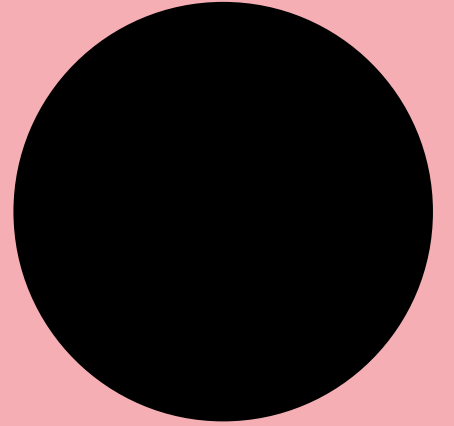
Executive Summary – Poland key standouts

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%), Russia and the war in Ukraine (**36%** vs 24%) 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%)
 - Russia and the war in Ukraine (**68%** vs. 59%)
 - Immigration (**50%** vs. 44%)
 - COVID-19 (**37%** vs. 29%)

** All country average, 2023*

Appendix Four: The UK



Executive Summary – United Kingdom key standouts

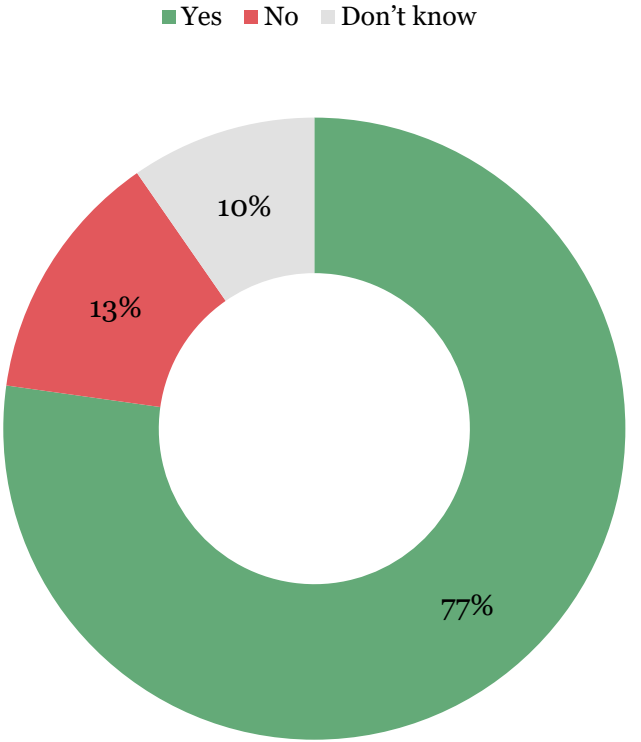
UK citizens are more likely than average* to see the cost of food as an important issue

- 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*

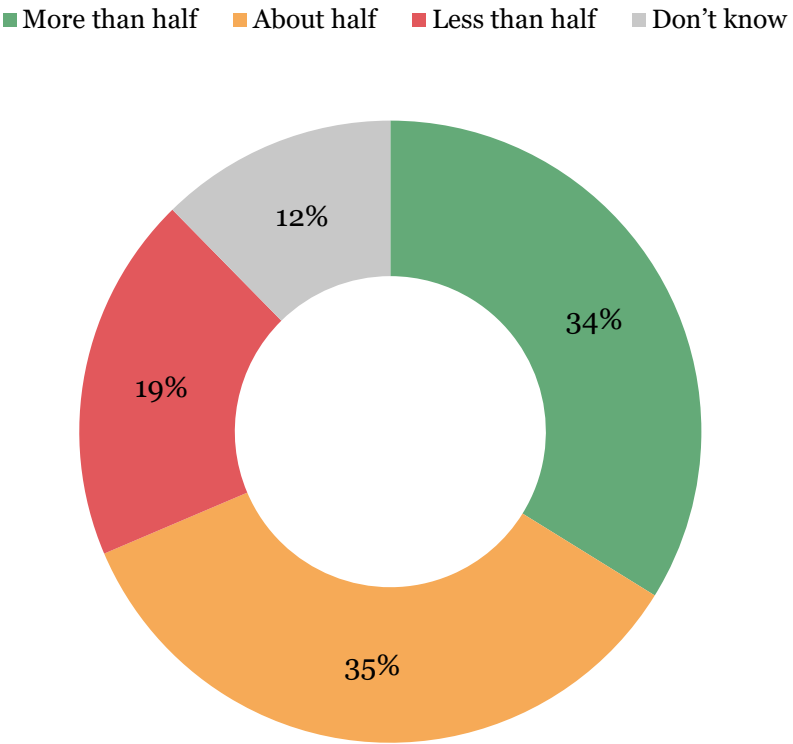
Just over three quarters of UK respondents say that public sector canteens in the UK should always provide at least one plant-based option

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



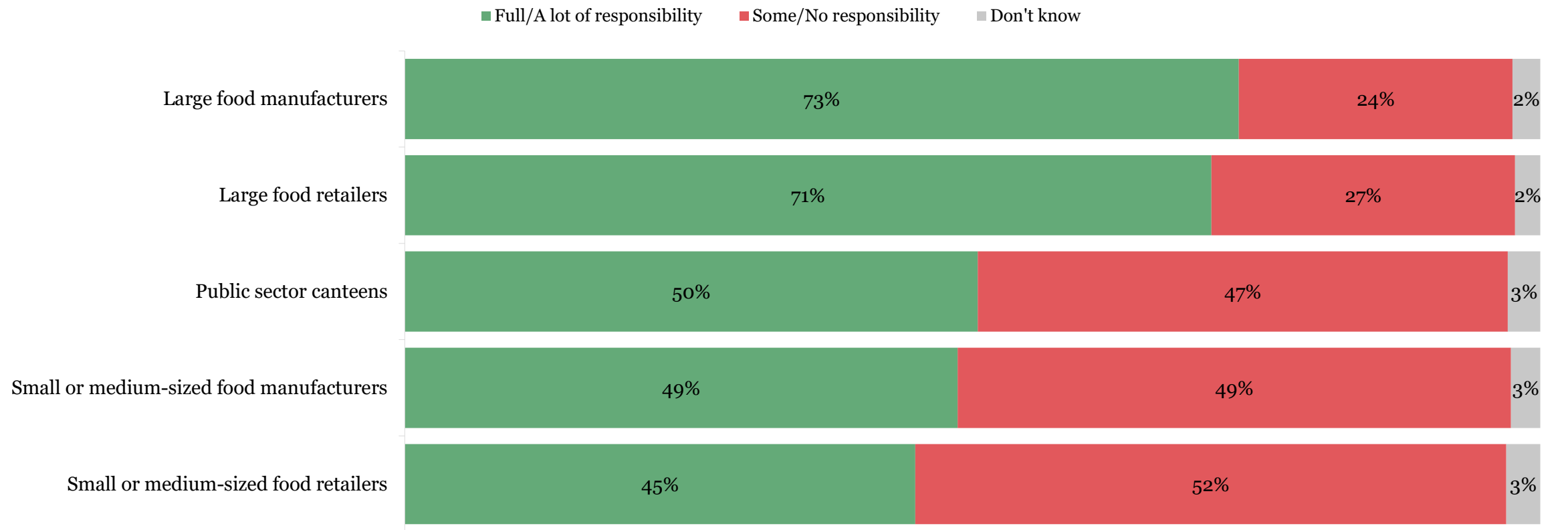
A third of UK respondents believe that public sector canteens should ensure that more than half of the food they serve each day should be sustainably produced

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

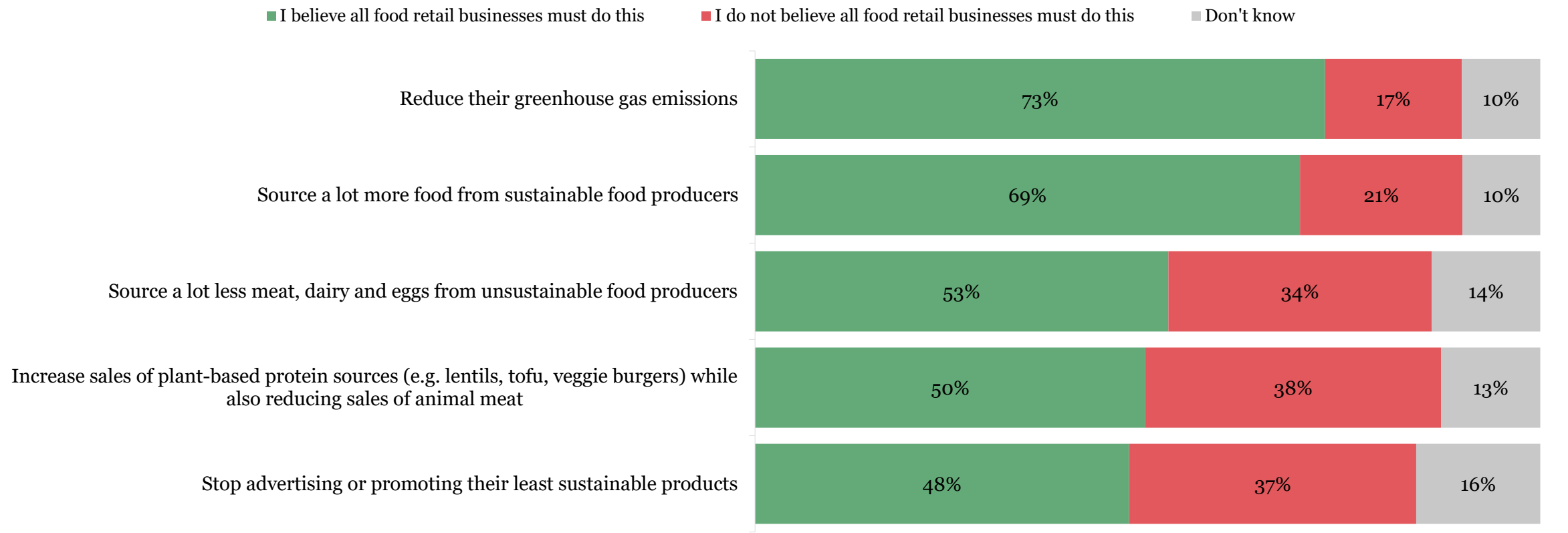


Seven in ten UK respondents see both large manufacturers and large retailers as having full/a lot of responsibility for ensuring the food they sell was produced sustainably

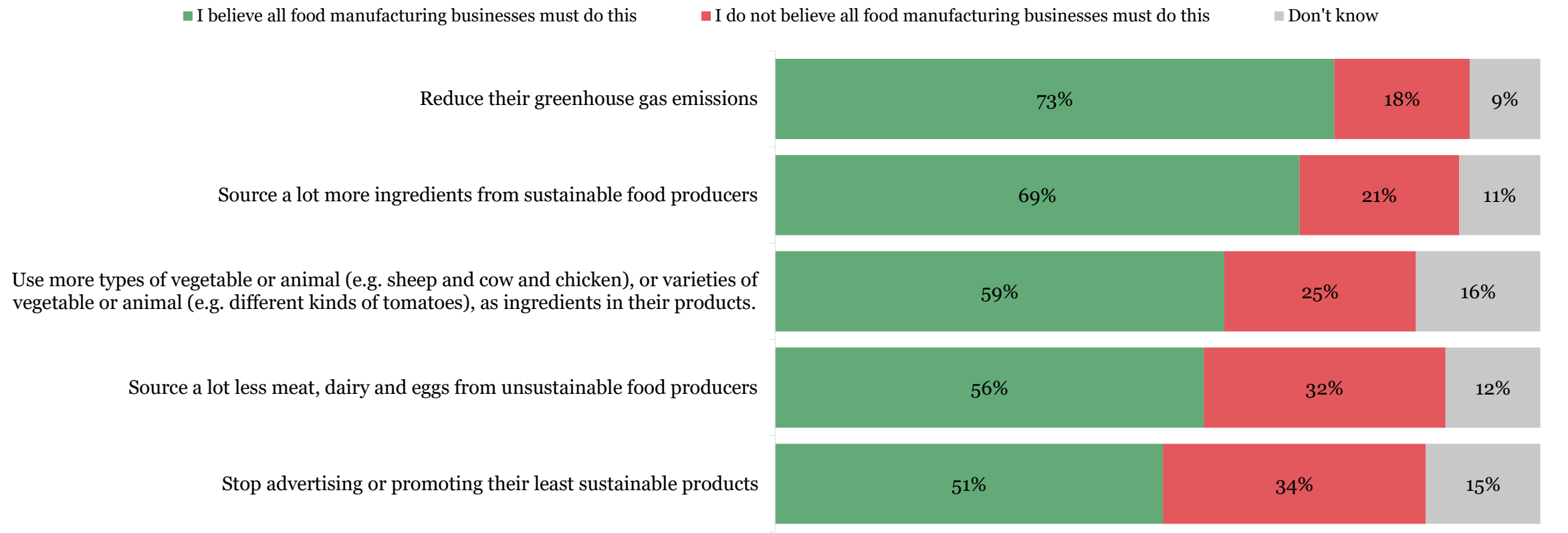
The proportion of EU respondents who attribute each level of responsibility for ensuring that the food they sell is sustainable, to each organisation



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



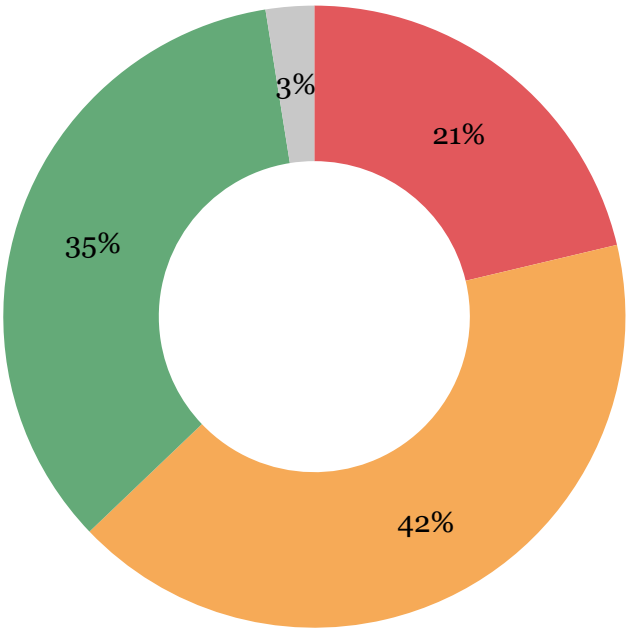
Seven in ten UK respondents believe that food manufacturing businesses must reduce their greenhouse gas emissions and source a lot more food from sustainable food producers



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



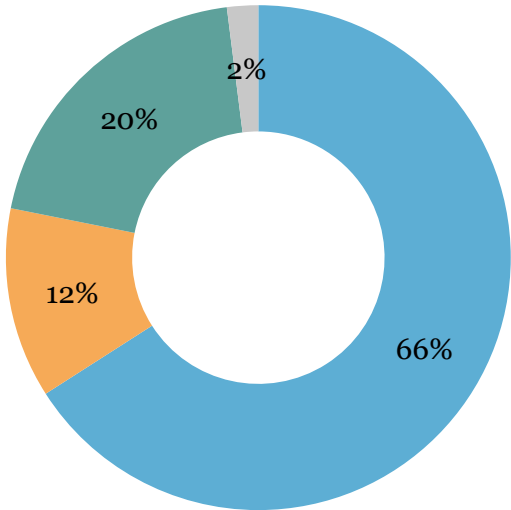
Thinking about the price of sustainable food, do you believe in future it should cost more, or less, than unsustainable food?

60 Base: Those aged 18-65 who live in the UK, 2023 (n=2035).

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

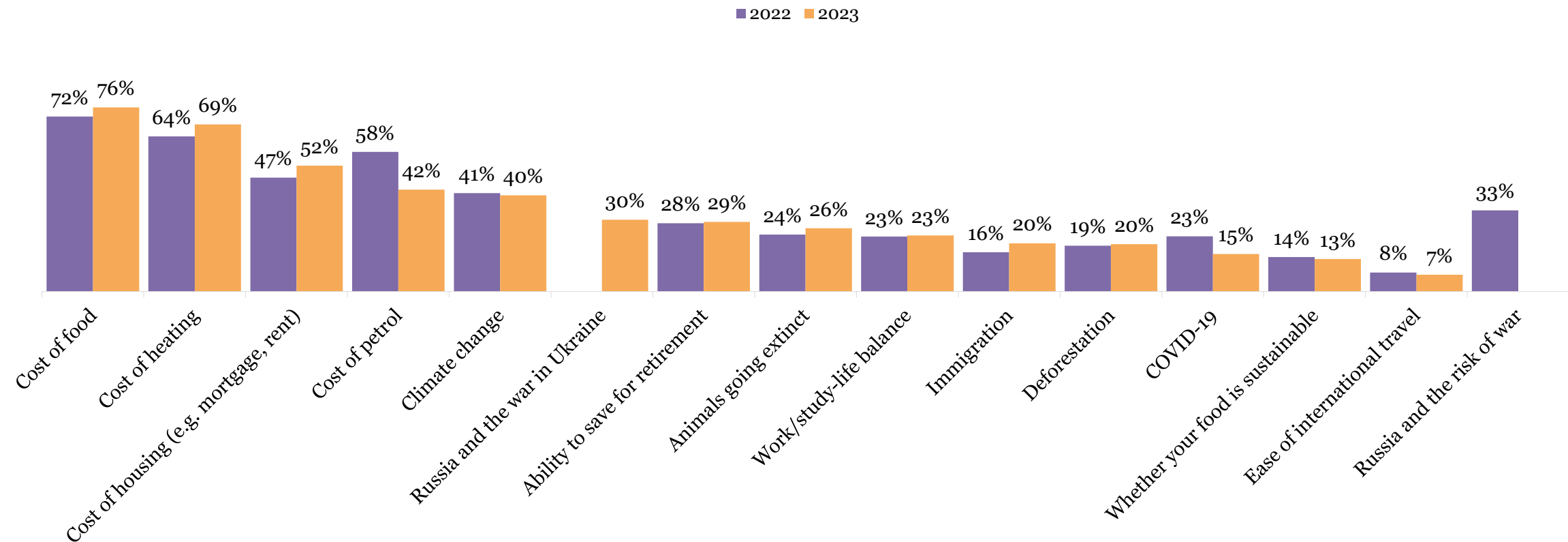
The proportion of UK respondents who believe that in the future sustainable food should cost less, who selected each option as the way to achieve that goal

- 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

