WWF Eat4Change survey
International research
Deforestation report

April 2021

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Contents:

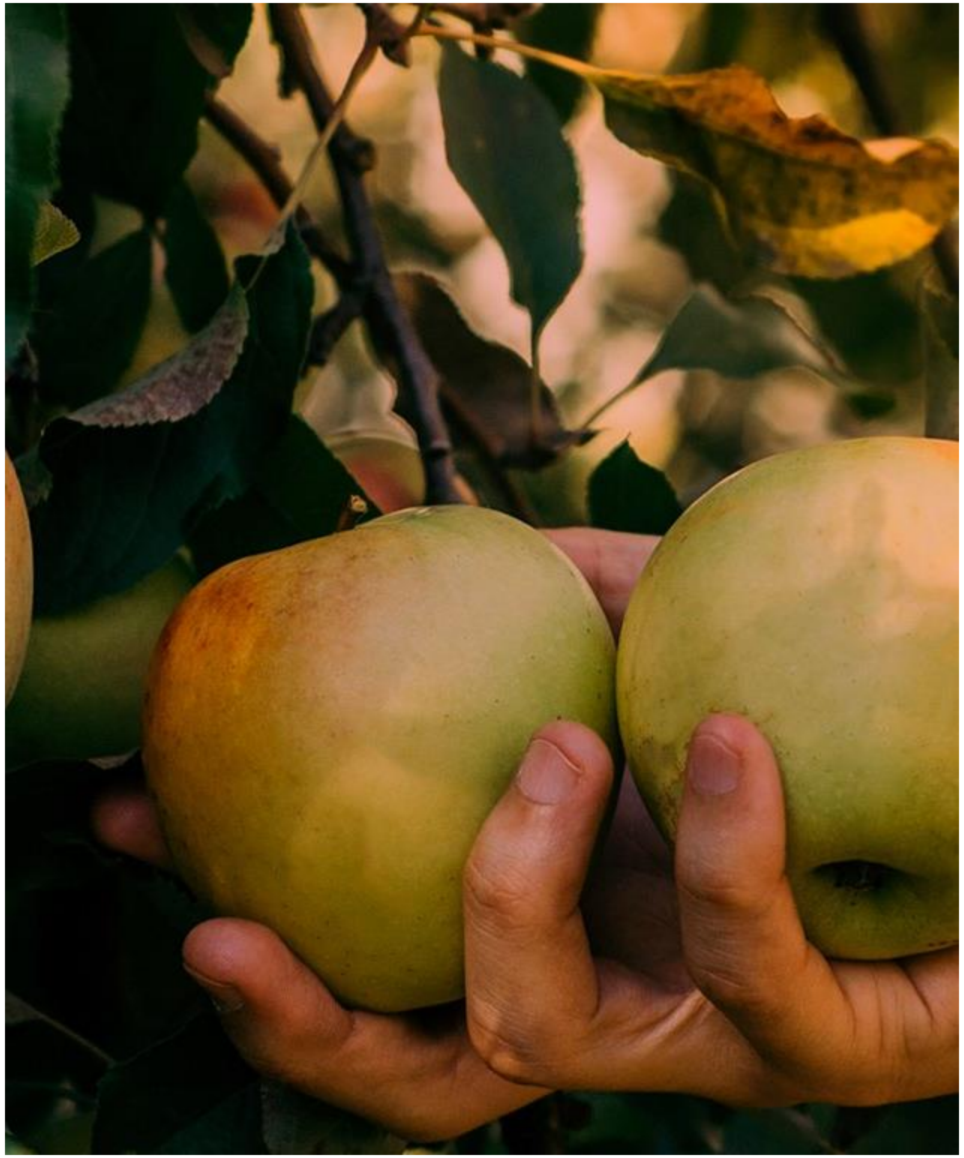
Background and objectives

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

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

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

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



Methodology

Sample

Total sample: Europe: 11,439

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

Method

An online panel

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

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

Fieldwork dates

24th February to 22nd March 2021

Executive Summary

Key findings overall: European level

Executive Summary 1: negative impact of food production and consumption

Amongst European adults, food production tends to be viewed as having a negative rather than positive impact:
- Only 4 in 10 think the food that their own country produces has a positive effect on the environment (42% positive);
- Over 1 in 2 think food produced outside of one's own country has a negative effect on the environment (54% negative).

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

Executive Summary 2: knowledge, concern, confidence and interest

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

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

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

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

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

- only 1 in 2 are confident in their knowledge of how to buy and eat sustainable food (46% confident);
- and levels of confidence decrease with age (18-24 yrs: 52% confident; >55 yrs: 42% confident).

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

Executive Summary 3: barriers preventing sustainable food choices

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

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

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

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

Some need to be convinced that sustainable food is appealing:

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

Only a small cohort cite inconvenience:

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

Executive Summary 4: responsibility for driving change

European adults tend to feel that everyone has some role to play in reducing the environmental impact of the food we produce and consume.

There is a recognition that responsibility lies as much with the individual (37%) as it does with the overriding governmental bodies of EU (41%) or UK (58%). These are the two key agents for driving change – to be supported by: food manufacturers and distributors (49%), producers such as farmers, fishermen (36%) and supermarkets (26%).

Whilst the most common view is that food is produced with *lower* environmental standards *outside* the EU/ UK (48%), nevertheless, the majority are unequivocal that Environmental Standards for food production need to be improved both inside EU/UK (70%), as well as outside EU/UK (74%).

Furthermore, there is strong support for action concerning the following specific initiatives:

- An integrated approach when protecting forests from deforestation, where other types of land (such as grasslands, savannah) are also protected, so that the problem does not shift elsewhere (76%);
- EU (74%)/ UK (72%) setting it's own criteria for imported food that is labelled 'sustainable';
- Labels added to all food products that have <u>not</u> caused diversity loss, so that people can make the right food choices (73%);
- Legislation to ensure all food products sold in the EU/UK are sustainable and have not caused a loss of biodiversity (EU 72%; UK 70%).

Executive Summary 5: changing behaviours

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

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

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

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

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

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

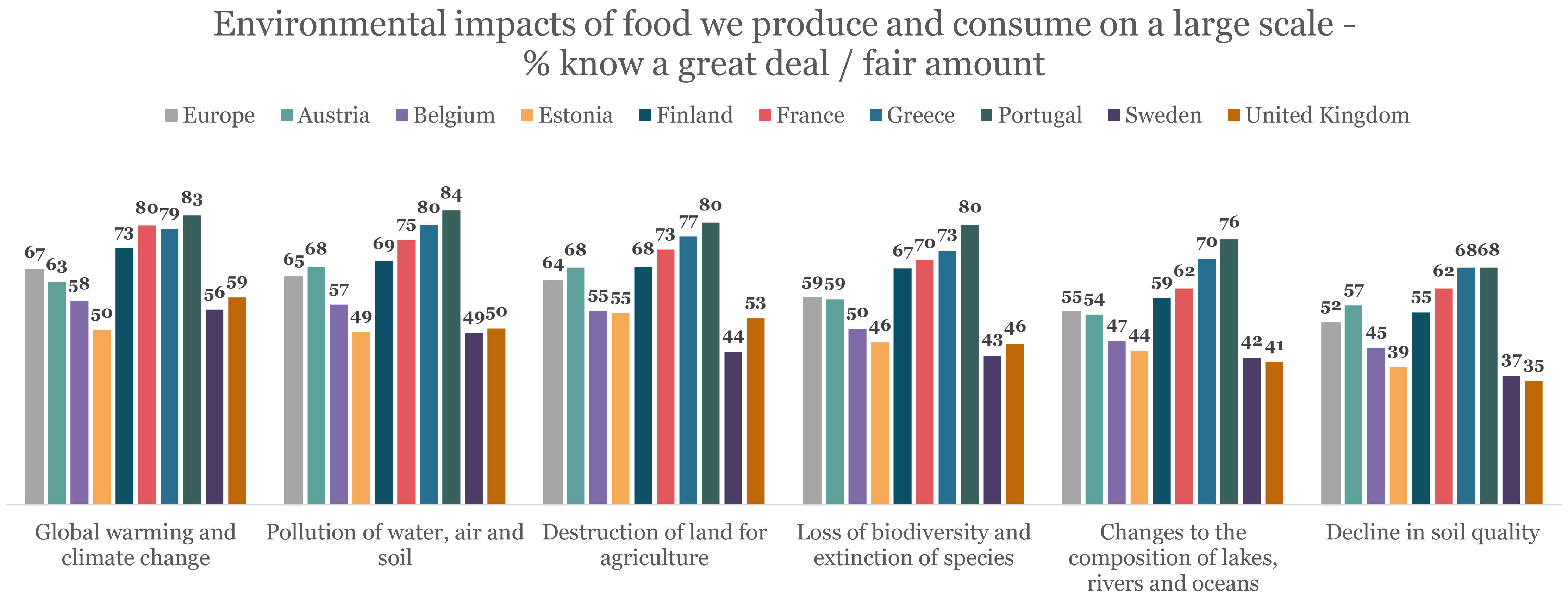
Main findings

Results by country

Impact of food production and consumption

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

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

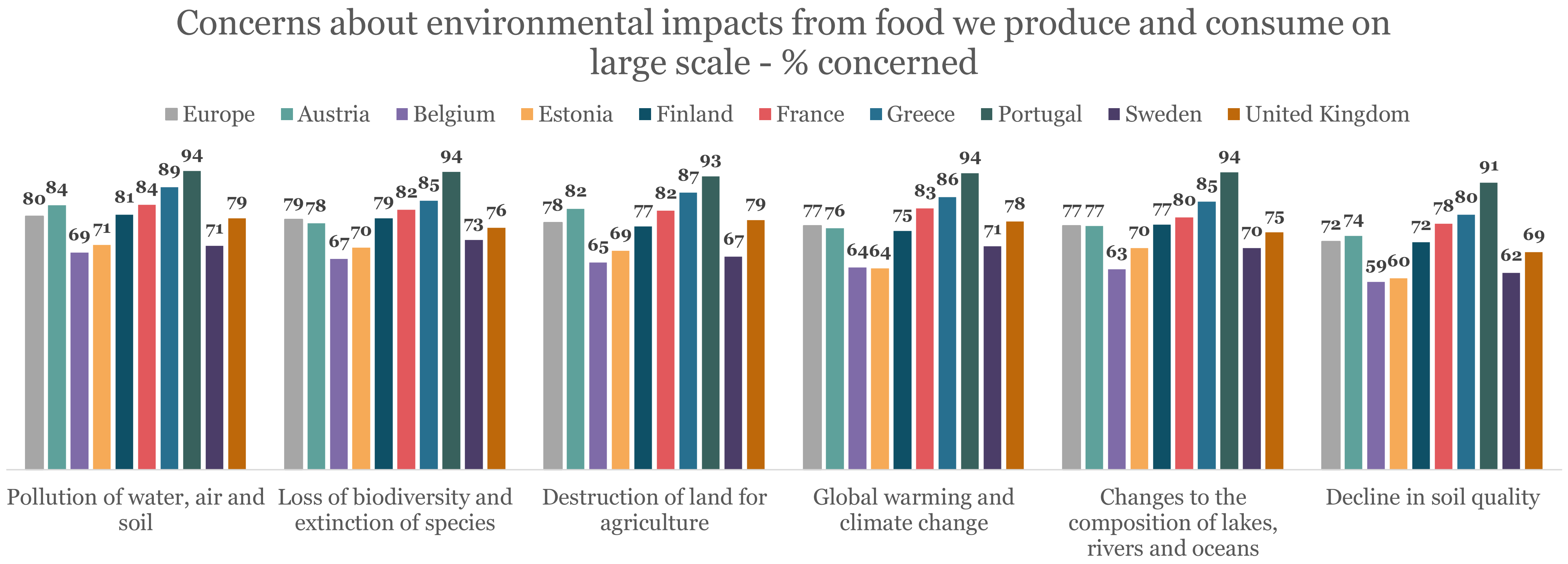


Q5: Before taking part in this survey, how much, if anything, would you say you knew about the following environmental impacts caused by the food we produce and consume on a large scale?

 Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

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

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

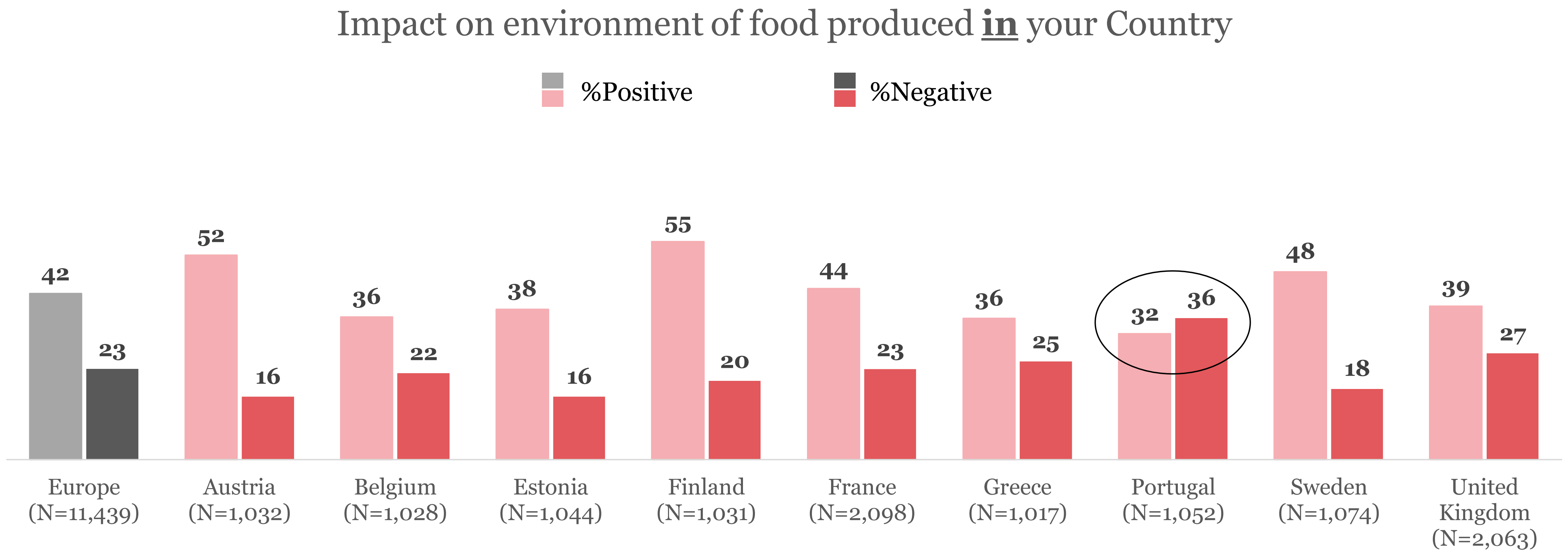


Q6: How concerned or unconcerned, if at all, are you about the following environmental impacts caused by the food we produce and consume on a large scale?

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

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

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

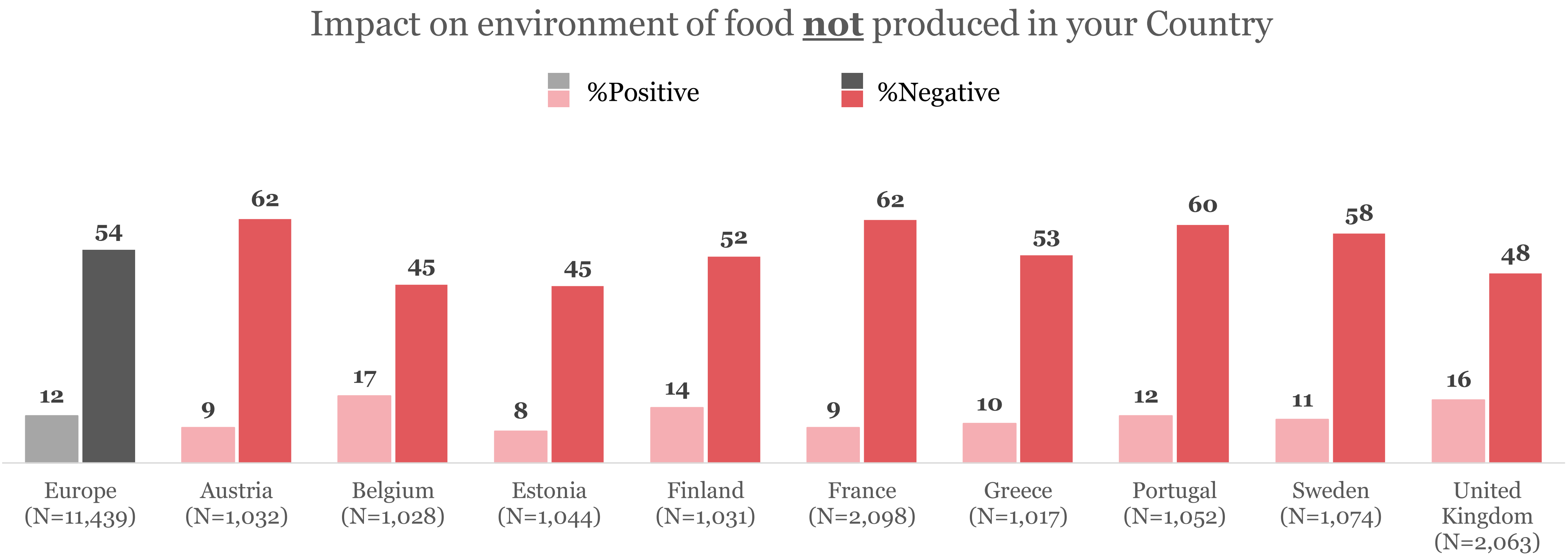


Q7: To what extent, if at all, do you think the two categories of food below have a positive or negative impact on the environment? Category 1: In your Country

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

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

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

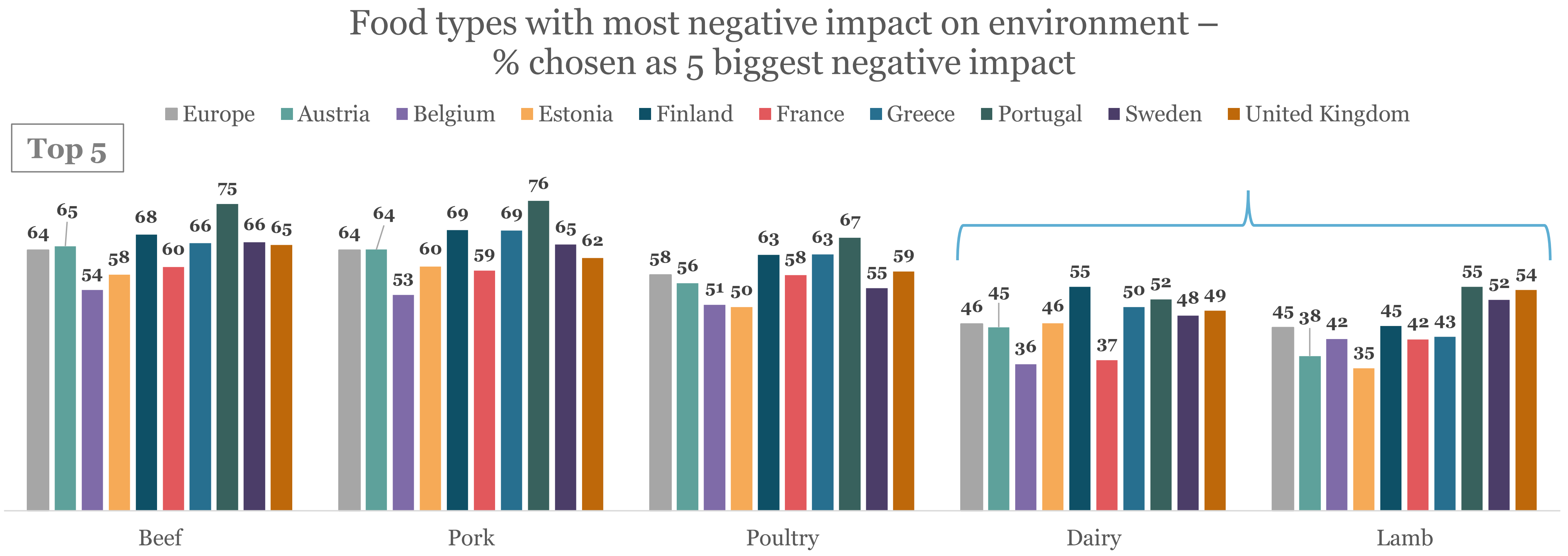


Q7: To what extent, if at all, do you think the two categories of food below have a positive or negative impact on the environment? Category 2: Outside your Country

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

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

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

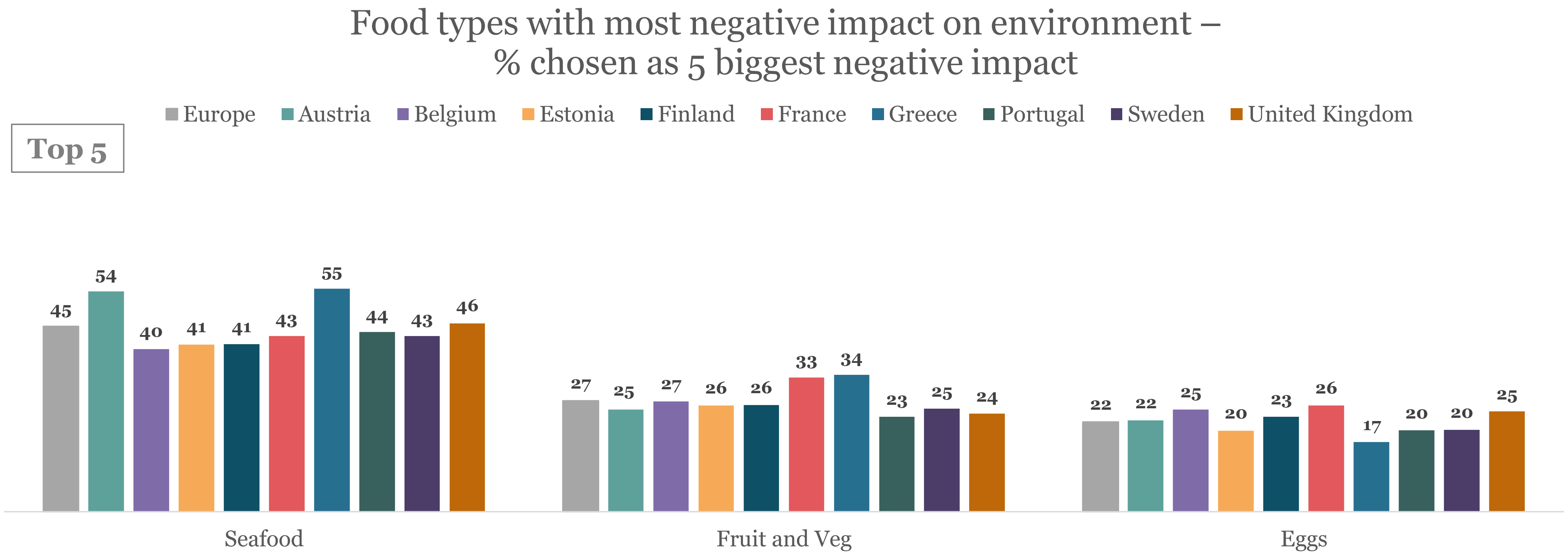


Q8: Which of the following do you think has the biggest <u>negative</u> impact on the environment, if any? Please select the top five and rank them in order of biggest negative impact

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

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

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



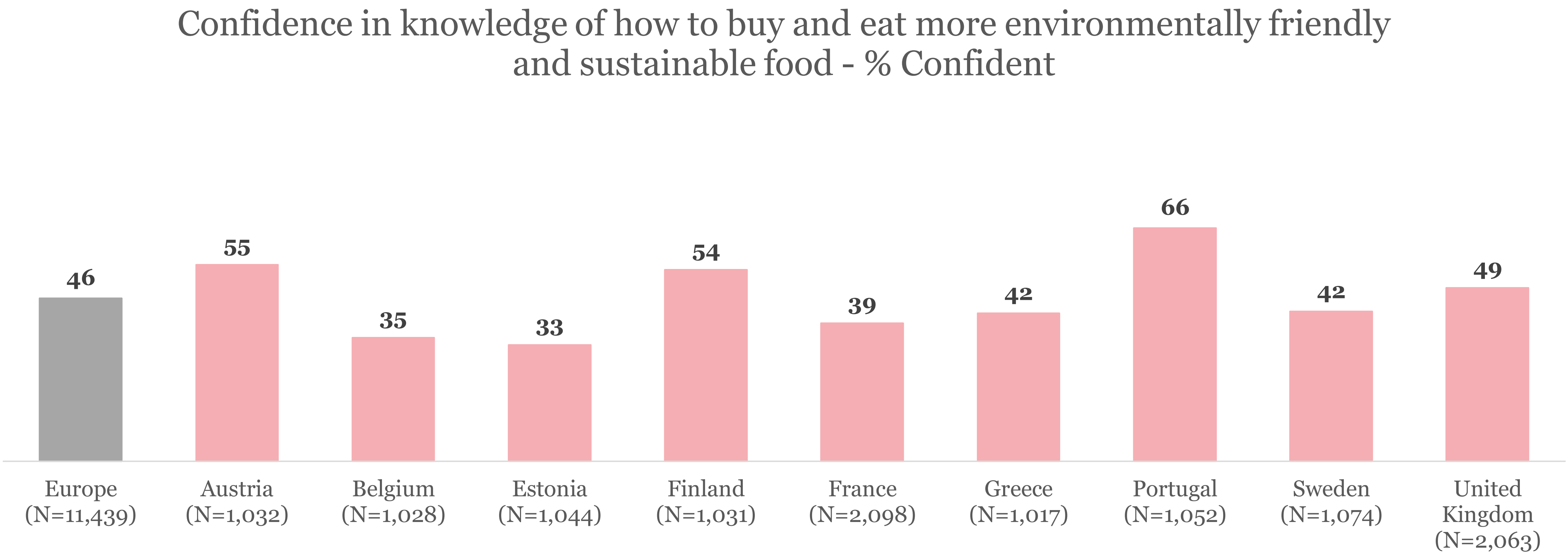
Q8: Which of the following do you think has the biggest negative impact on the environment, if any? Please select the top five and rank them in order of biggest negative impact

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

Knowledge, confidence and concern

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

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



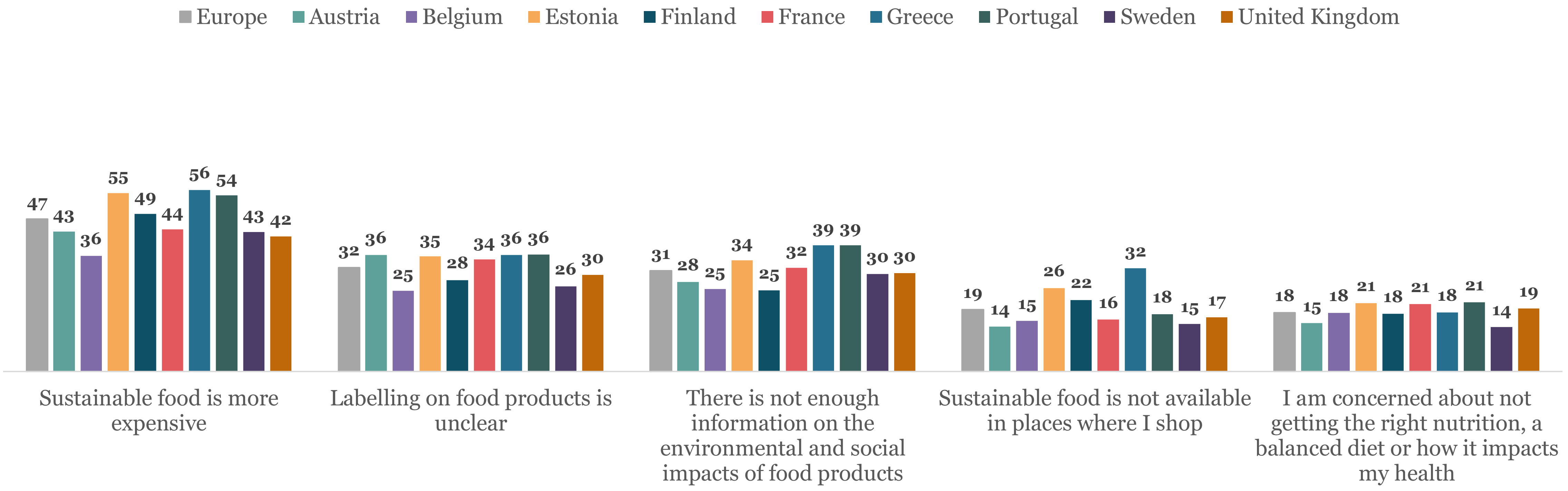
Q9: How confident or unconfident are you in your knowledge of how to buy and eat more environmentally friendly and sustainable food?

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

Barriers preventing sustainable food choices

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

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

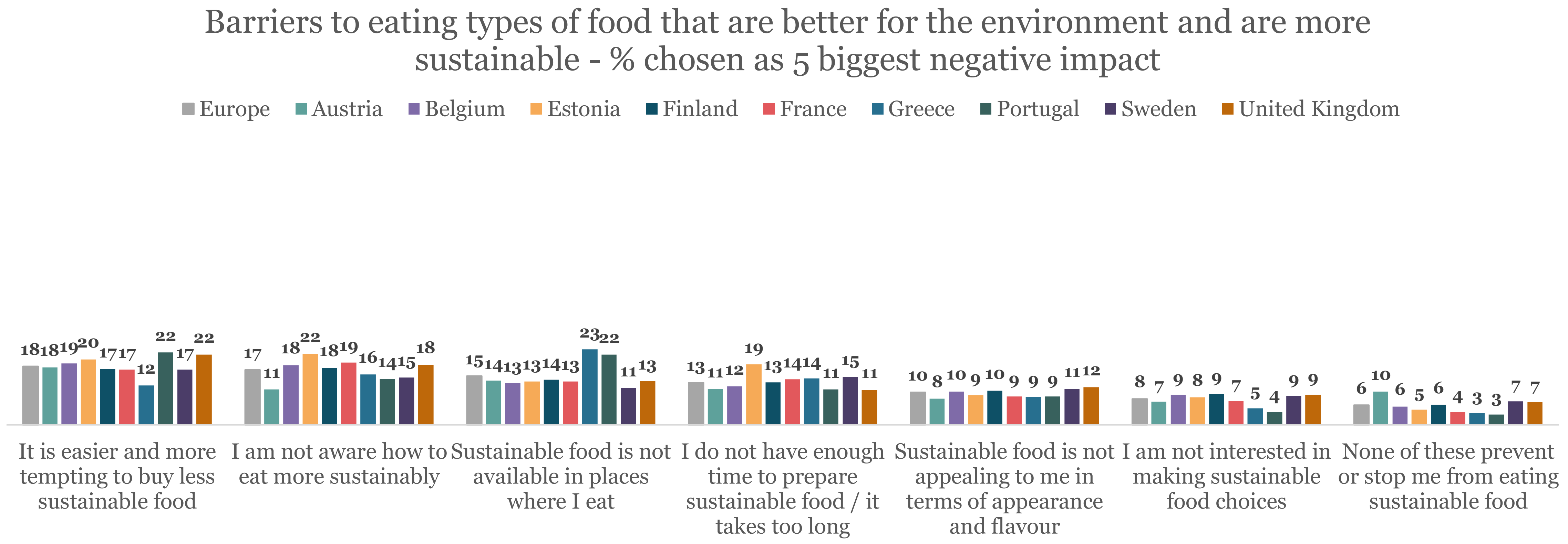


*Q11: Which of the following, if any, **prevents or stops you** from eating types of food that are better for the environment and are more sustainable?*

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

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

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



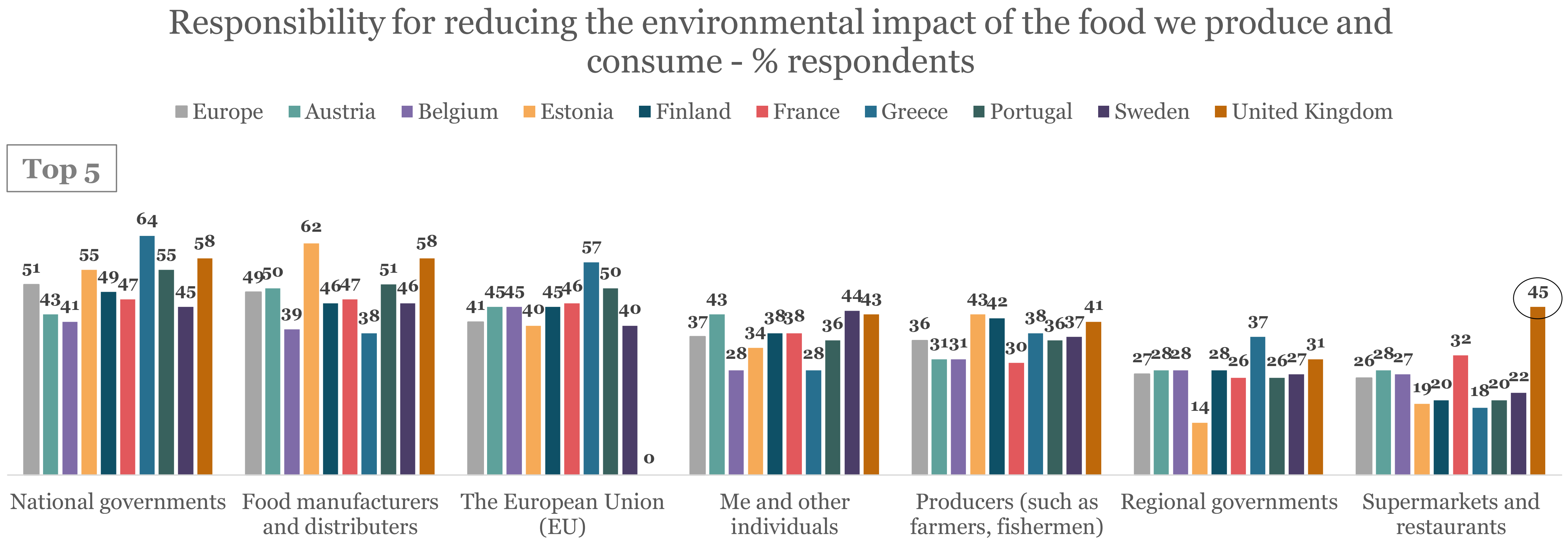
*Q11: Which of the following, if any, **prevents or stops you** from eating types of food that are better for the environment and are more sustainable?*

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

Responsibility for driving change

Responsibility for reducing the environmental impact of food production is placed by most European adults on national governments, manufacturers/distributers and the EU*. Individual responsibility is ranked below these groups

- Greece puts particular emphasis on the national government and EU
- Whilst Estonia places more responsibility on manufacturers and distributers



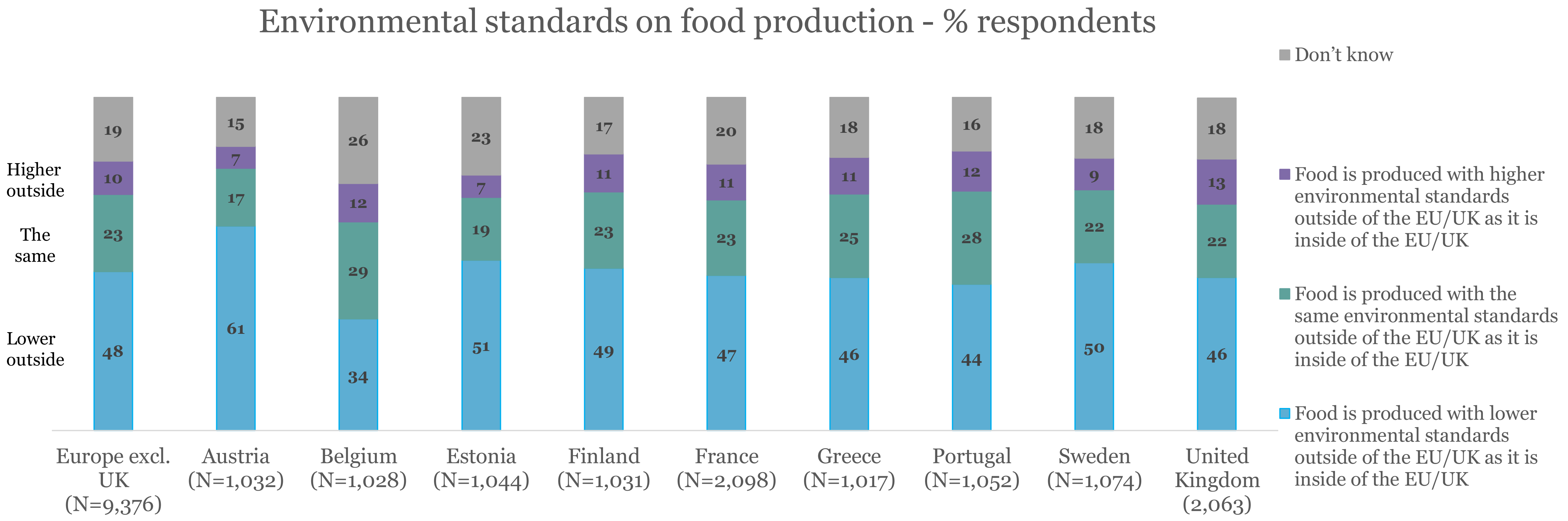
* UK adults were not shown 'The European Union' as an option – this slightly increases their other responses

Q12: In your opinion, who do you think is most responsible for reducing the environmental impact of the food we produce and consume? Environmental impacts could include: greenhouse gas emissions; pollution and degradation of soil, water and air; and impacts on other plants and animals.

 Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

Half believe that environmental standards of food production are lower outside of the EU. Two in ten say they 'don't know', further indicating a lack of knowledge

- Three in five Austrians feel most strongly that environmental standards are lower outside of the EU
- Whereas only one third of those in Belgium say they are lower outside, three in ten also feel standards are the same.

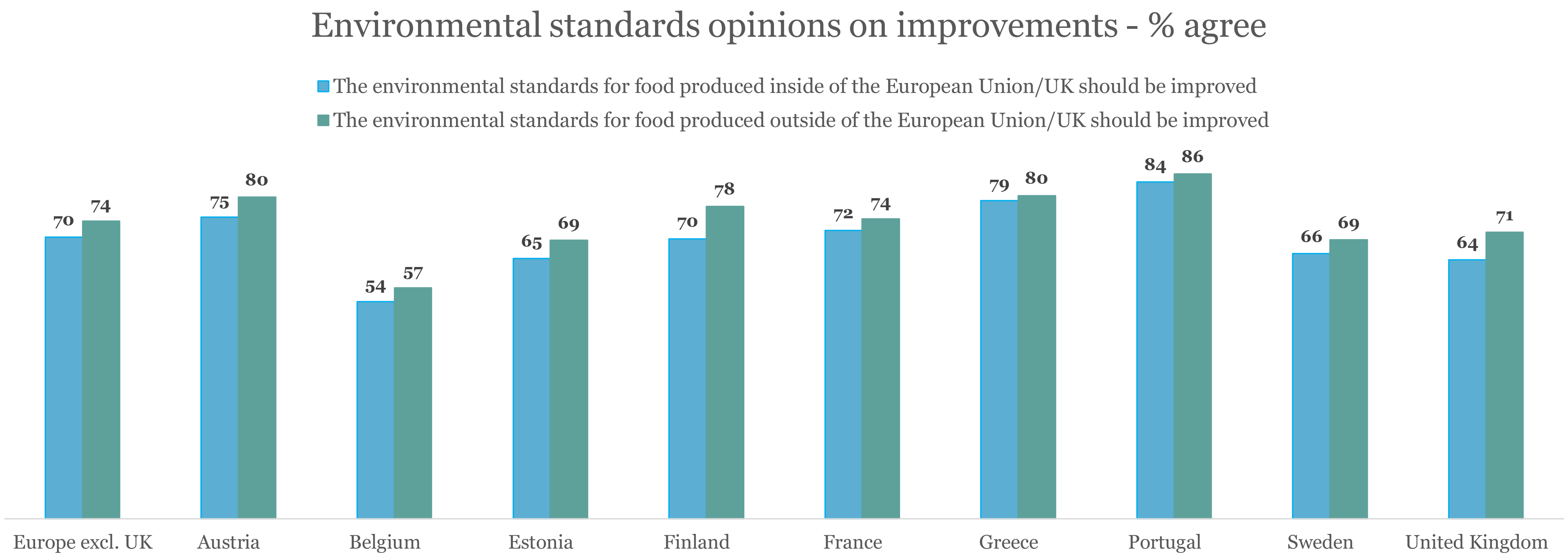


Q13/14: Thinking broadly about food that is produced inside and outside of the EU/UK, which of the following best describes your point of view, if any?

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

However, there is a widespread belief that environmental standards need improving both inside and outside of the EU.

- **Agreement with the need for improvement is highest in Portugal, amongst over eight in ten while around only half those in Belgium agree.**



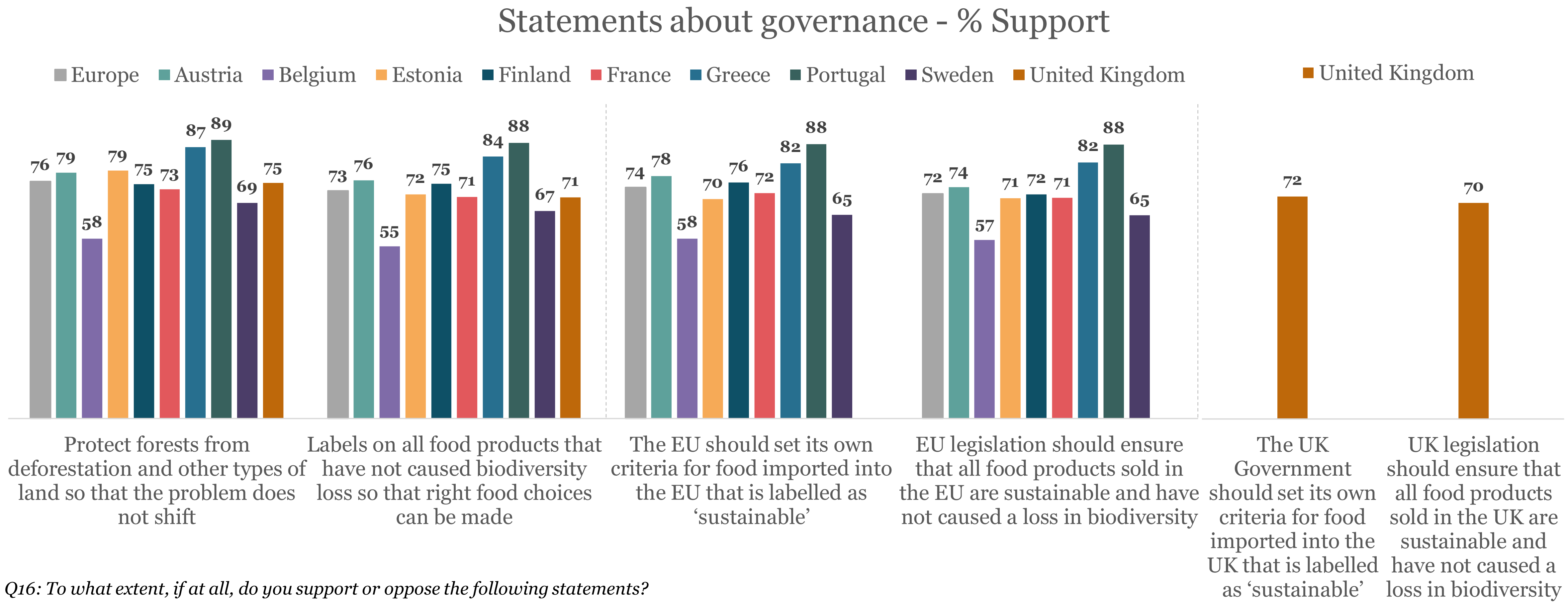
Q15: To what extent, if at all, do you agree or disagree with the following statements?

Base: Europe (9,376); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

Sustainability, governance and behavioural change

There is a high level of support amongst European adults overall, for all of these initiatives aimed at improving the environmental impact of food production and consumption of sustainable foods

- **Support is greatest in Portugal, Greece and Austria and the lowest in Belgium**

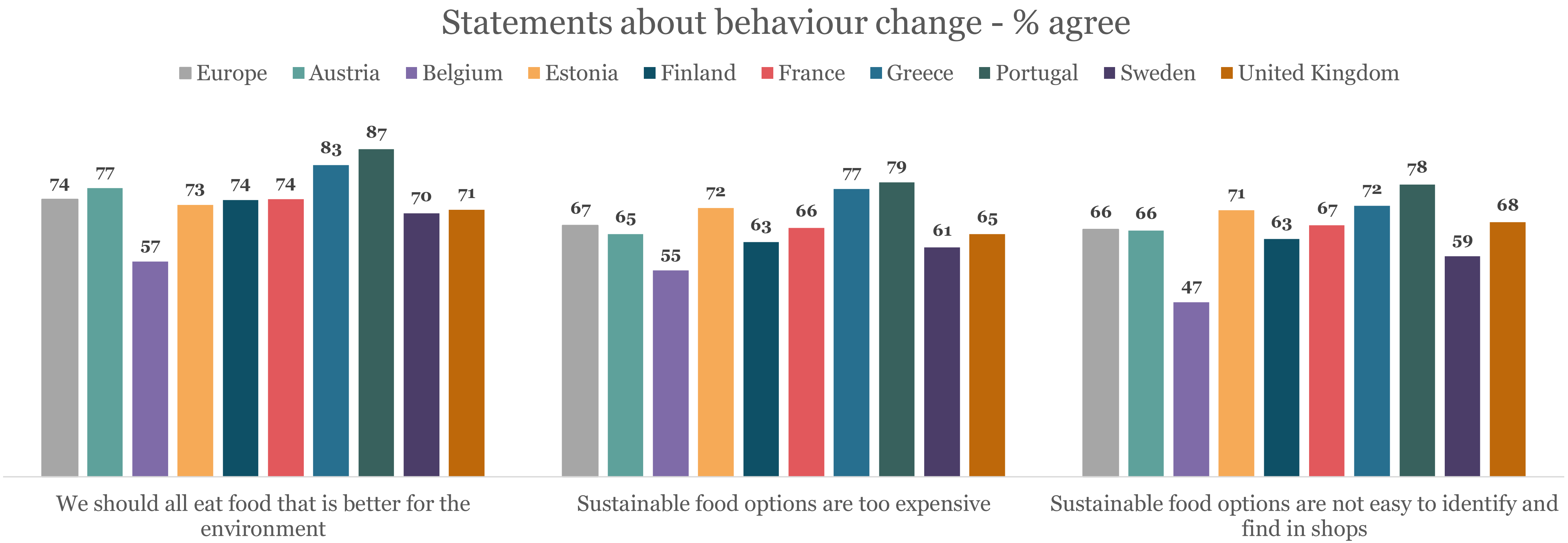


Q16: To what extent, if at all, do you support or oppose the following statements?

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

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

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

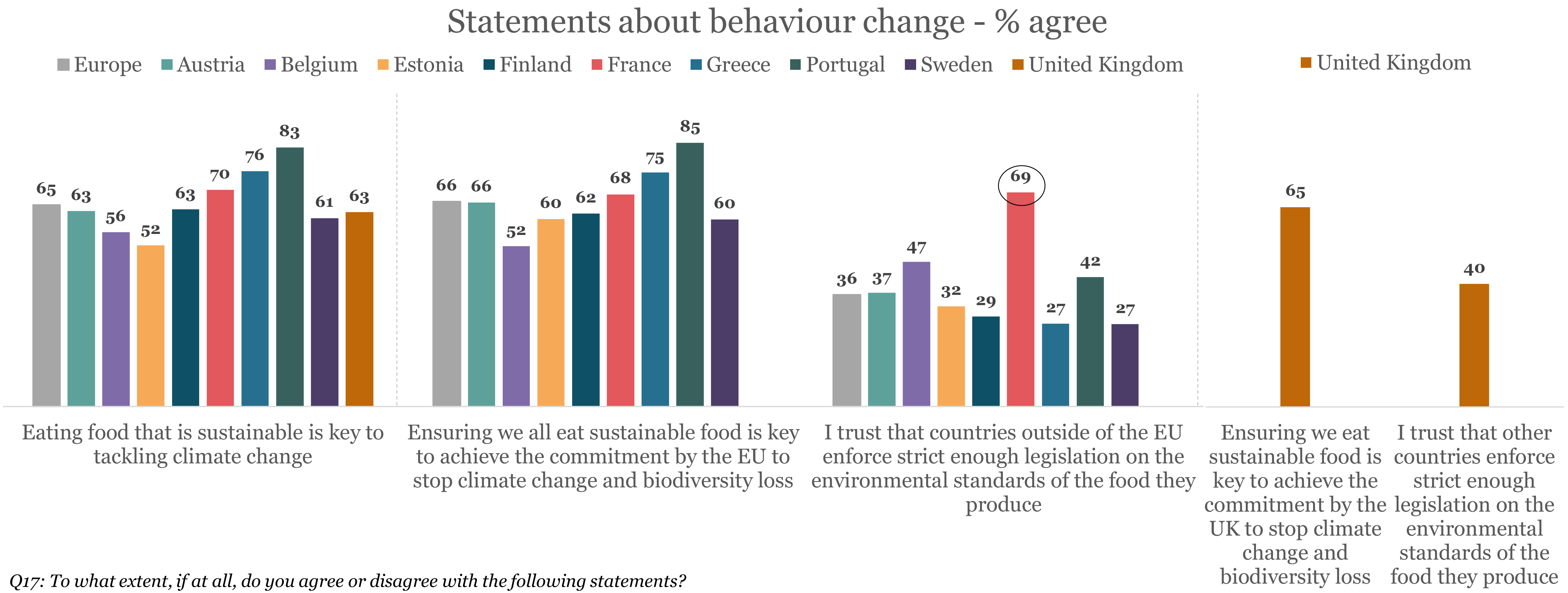


Q17: To what extent, if at all, do you agree or disagree with the following statements?

Base: Europe (11,439); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

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

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



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

Base: Europe (11,439); Europe excl. UK (9376); Austria (1,032); Belgium (1,028); Estonia (1,044); Finland (1,031); France (2,098); Greece (1,017); Portugal (1,052); Sweden (1,074); UK (2,063)

Country summary

Austrians are high on engagement, confidence and individual responsibility. And they want countries both inside and outside EU to play their part by improving environmental food standards.

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

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

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

The French tend to reflect the European average.

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

Portuguese are highly knowledgeable, concerned, confident and committed to food sustainability. They are highly critical of the negative environmental impacts of food production, and strongly support the improvement of standards. They are also highly supportive of EU initiatives that better help people choose sustainable food. They are the most highly motivated to change their food choices – but expense, availability and identification are key barriers.

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

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

Appendix

Country summaries

Executive Summary – Austria key standouts

Austrians are high on engagement, confidence and individual responsibility. And they want countries both inside and outside the EU to play their part by improving environmental food standards.

Confidence and interest is higher than average:

- knowing how to buy and eat more environmentally friendly and sustainable food (55% v 46%*);

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

- own country's food production and consumption has a positive impact on the environment (52% v 42%*);
- other countries' food production and consumption has a negative impact on the environment (62% v 54%*);
- highly critical that there are lower environmental food standards outside the EU (61% v 48%).

They are strongly in favour of improving environmental food standards both inside the EU (75% v 70%*) and outside the EU (80% v 74%*).

** Europe average*

Executive Summary – Belgium key standouts

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

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

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

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

They are least likely to see the need to change their behaviour:

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

They are least in favour of improving environmental food standards both inside the EU (54% v 70%*) and outside the EU (57% v 74%*).

Their support for other sustainable initiatives is also low: e.g.:

- EU legislation should ensure that all food products sold in the EU are sustainable and have not caused a loss of biodiversity (57% v 72%*).

** Europe average*

Executive Summary – Estonia key standouts

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

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

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

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

Barriers are particularly strong concerning:

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

** Europe average*

Executive Summary – Finland key standouts

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

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

They have a positive stance to their home grown food:

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

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

** Europe average*

Executive Summary – France key standouts

The French tend to reflect the European average.

In the few areas where they differ:

- uniquely, amongst EU countries, they have a high level of trust that countries outside EU enforce strict enough legislation on the environmental standards of the food they produce (69% v 36%*) …

- …despite having a stronger view of the negative environmental impact of food not produced in France (62% v 54%* negative).

** Europe average*

Executive Summary – Greece key standouts

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

They are highly aware and highly concerned about all aspects of environmental impacts caused by the food we produce and consume on a large scale. And they strongly support improving Environmental Standards for food production both inside EU (79% 70%*), and outside EU (80% v 74%*).

There is a strong motivation to change their food choices:

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

But there are strong barriers to change:

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

** Europe average*

Executive Summary – Portugal key standouts

Portuguese are highly knowledgeable, concerned, confident and committed to food sustainability. They are highly critical of the negative environmental impacts of food production, and strongly support the improvement of standards. They are also highly supportive of EU initiatives that better help people choose sustainable food. They are the most highly motivated to change their food choices – but expense, availability and identification are key barriers.

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

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

They are most critical of food production's impact on the environment, and are the strongest advocates for improving standards:

- food produced in their country is not positively viewed for impact on the environment (32% v 42%* positive)
- food produced outside their country is negatively viewed for impact on the environment (60% vs 54%* negative)
- environmental standards for production should be improved both inside EU (84% v 70%*) and outside EU (86% v 74%*).

Continued …

** Europe average*

Executive Summary – Portugal key standouts

…Continued

They are also highly supportive of sustainable initiatives e.g.:

- EU should set its own criteria for food imported into the EU that is labelled sustainable (88% v 74%*);
- labels should be added to all food products that have <u>not</u> caused biodiversity loss so people can make the right food choices (88% v 73%*).

They are highly motivated to change:

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

But there are strong barriers to change:

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

** Europe average*

Executive Summary – Sweden key standouts

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

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

Their support for initiatives and actions is always below average, e.g.:

- legislation to ensure all food products sold in the EU are sustainable and have not caused a loss of biodiversity (65%; v 72%).

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

** Europe average*

Executive Summary – UK key standouts

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

Responsibility for reducing the environmental impact of food lies firstly with the national government (58% v 51%*) and the food manufacturers and distributers (58% v 49%) and secondly with the supermarkets and restaurants (45% v 26%*)

** Europe average*

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