



**Special
Eurobarometer 505**

Making our food fit for the future - Citizens' expectations

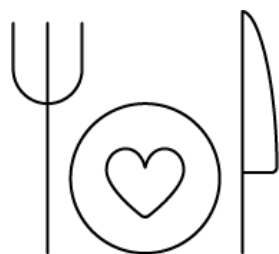
METHODOLOGY

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

I. WHAT IS SUSTAINABLE FOOD?

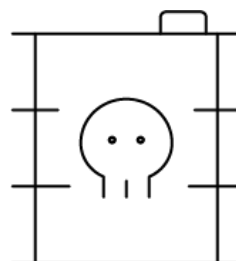
What are the main characteristics of “sustainable” food?

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



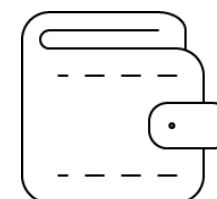
Nutritious
and healthy

41%



Little or no use of
pesticides

32%

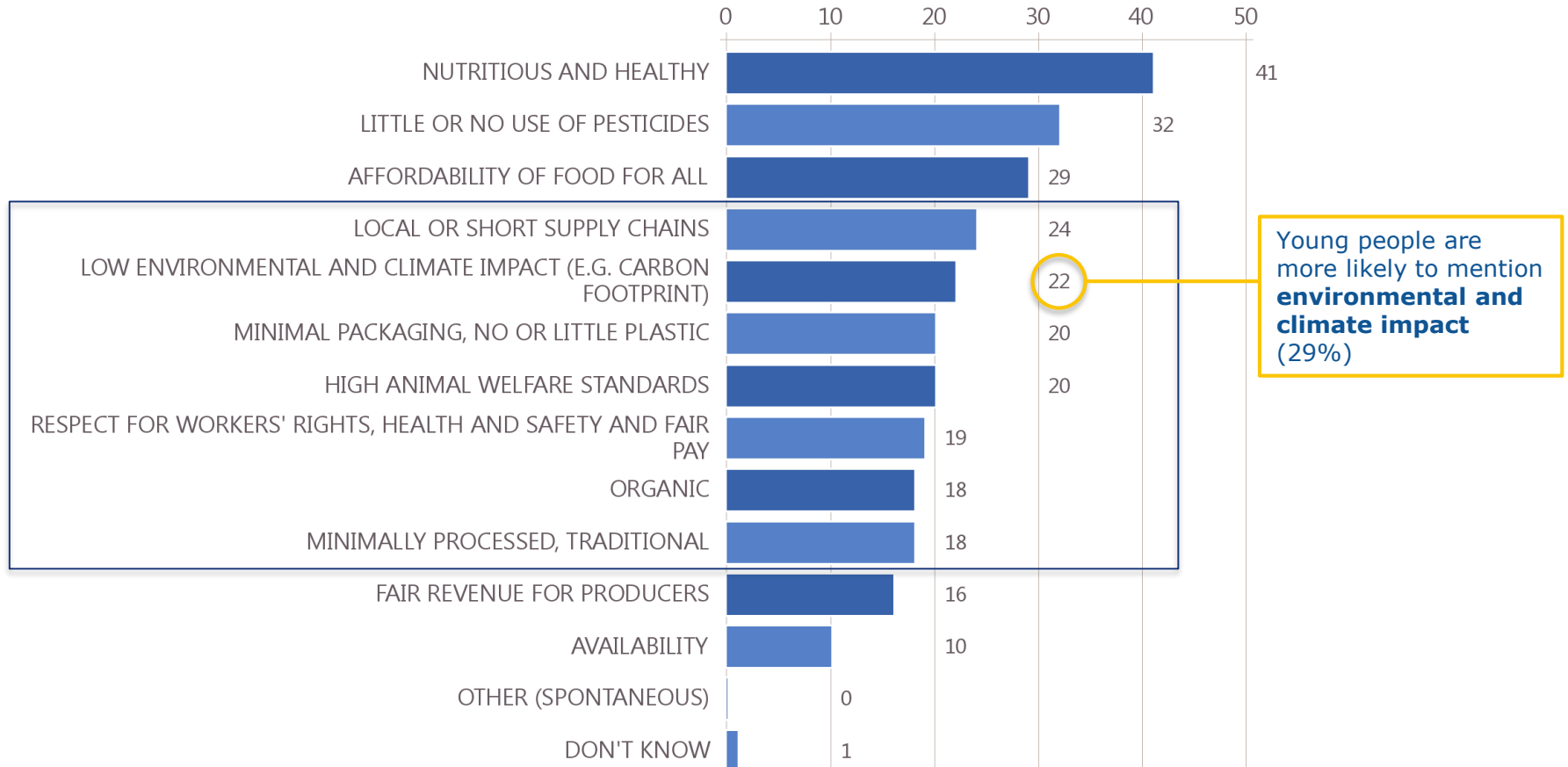


Affordability of
food for all

29%

In addition to the top three, two other items are mentioned by around 25% of Europeans – and five others by around 20%

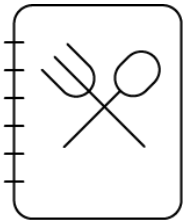
QB2T Which of the following do you consider to be the most important characteristic of "sustainable" food? Firstly? And then? (MAX. 3 ANSWERS)
(% - EU)



Base: all respondents (n.= 27,237)

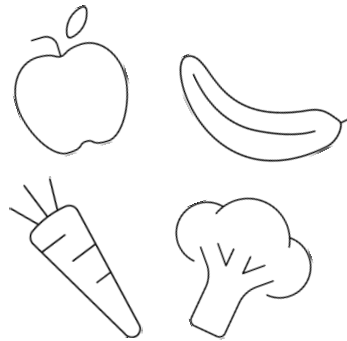
What makes a diet sustainable?

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



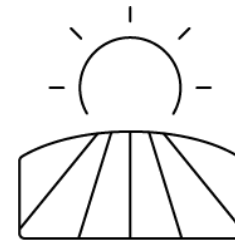
Eating a variety of different foods, having a balanced diet

58%



Eating more fruits and vegetables

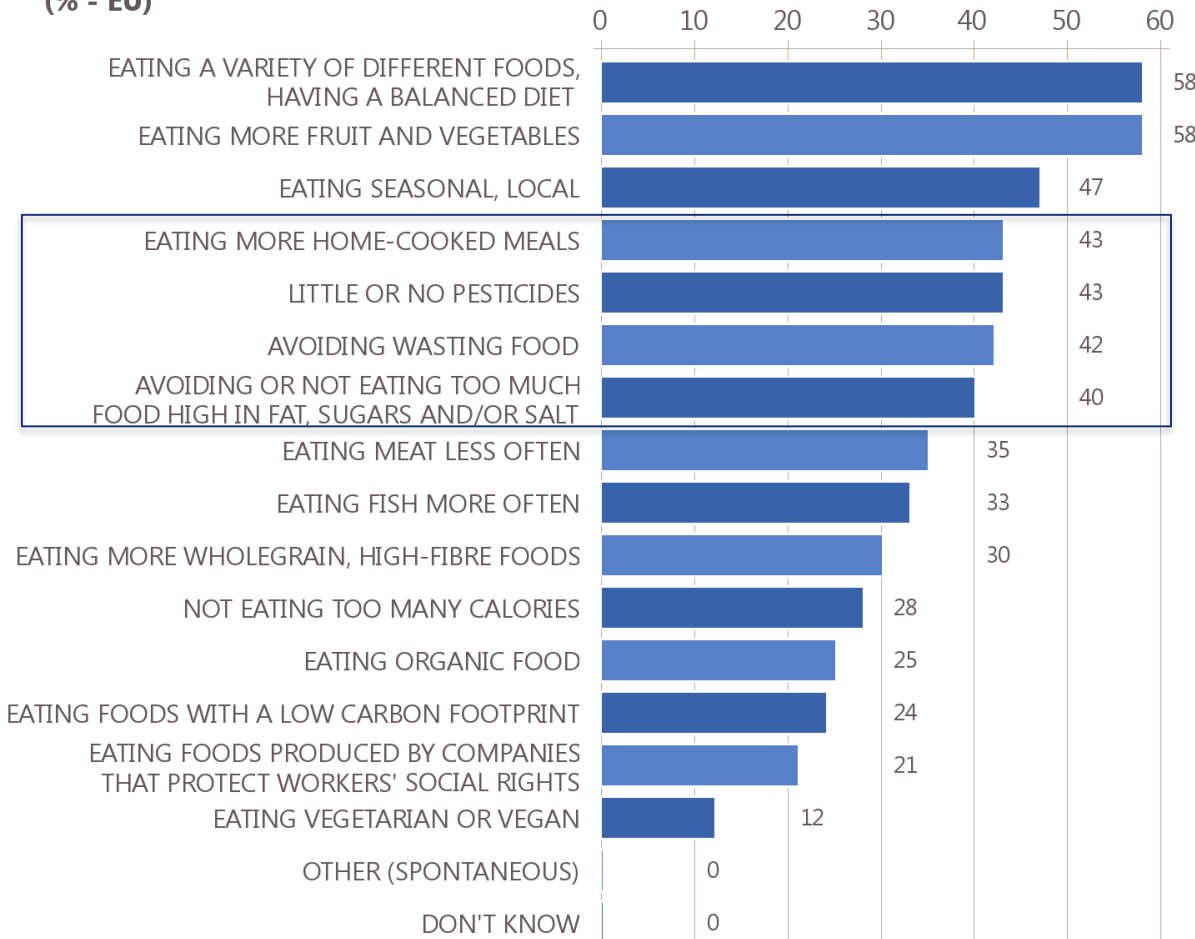
58%



Eating seasonal, local

47%

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



In addition to the three most mentioned answers, at least 40% of respondents mentioned:

- Eating more home-cooked meals
- Little or no pesticides
- Avoiding wasting food
- avoiding/not eating too much food high in fat, sugars and/or salt

Base: all respondents (n.= 27,237)

What is sustainable food?

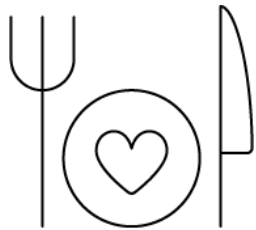
- *Citizens have no problem with the concept of sustainable food*
- *Nutrition and health are the most mentioned elements of sustainable food - mentioned more often than factors like environmental or climate impact*
- *Likewise, a sustainable diet is mainly linked to a nutritionally well-composed and healthy diet.*
- *In the context of food, sustainability is therefore currently linked more to personal aspects rather than to aspects related to the environment.*



II. DOES THE CONCEPT OF SUSTAINABILITY HAVE AN IMPACT ON CONSUMER CHOICE?

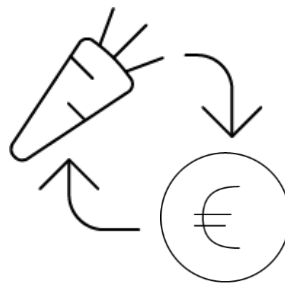
What aspects of a sustainable diet are important to you?

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



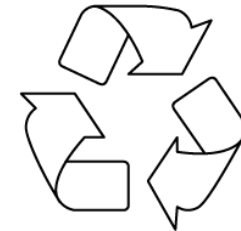
What you eat is healthy for you

74%



What you eat supports local economy

50%

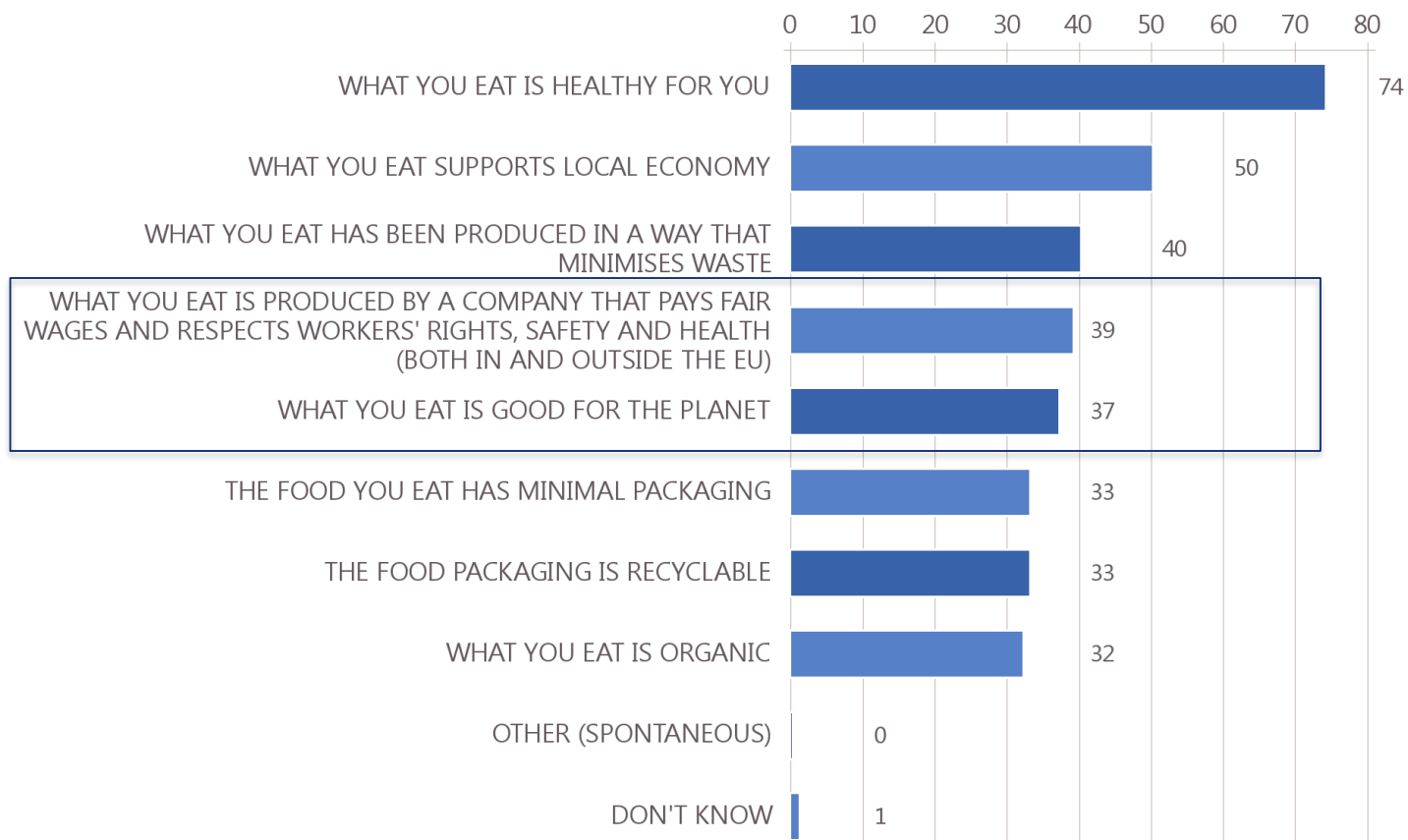


What you eat has been produced in a way that minimises waste

40%

Two other important aspects are mentioned by nearly four in ten Europeans.

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



Base: all respondents (n.= 27,237)

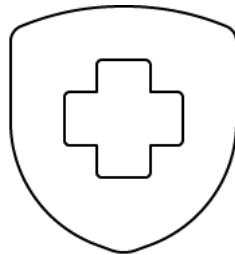
What drives consumers' food purchases?

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



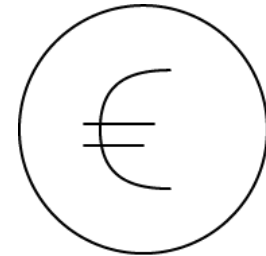
Taste

45%



Food safety

42%



Cost

40%

'Where the food comes from' and the 'nutrient content' are also aspects which are important for Europeans (mentioned by around a third of them)

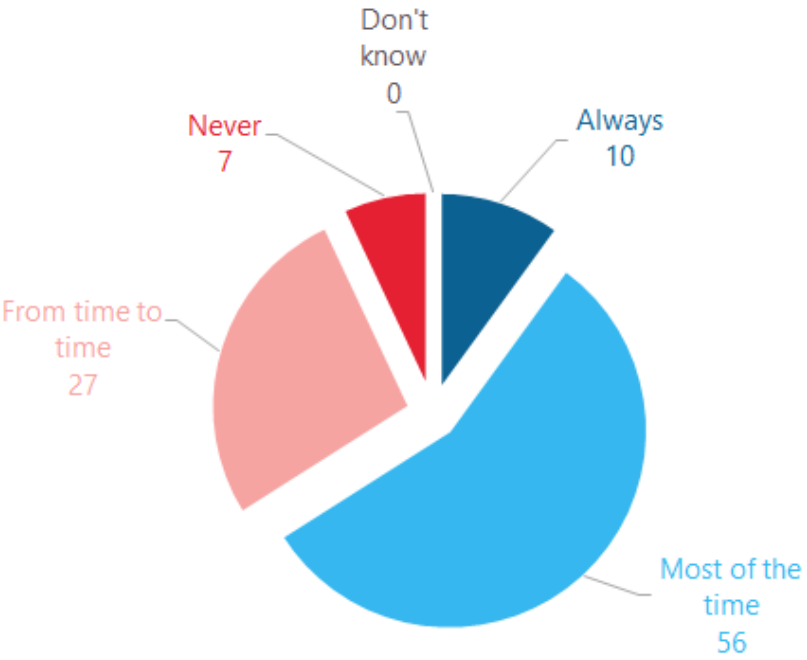
QB1T When you buy food, which of the following are the most important to you? Firstly? And then? (MAX. 3 ANSWERS)
(% - EU)



Base: all respondents (n.= 27,237)

Adopting a sustainable diet: majority of respondents say they eat a healthy and sustainable diet most of the time

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



Base: all respondents (n.= 27,237)

Does the concept of sustainability have an impact on consumer choice?

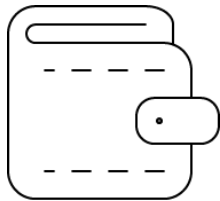
- *Consumers see sustainability as important and the most important aspects again are whether the foods they eat are healthy*
- *However, their food choices are still dominated by the main classic criteria: taste, cost and safety.*
- *In addition, many consumers believe that their food is already healthy and sustainable.*
- *Promoting healthier and more sustainable choices must therefore overcome two important obstacles*
 - - Optimistic bias - people believe they are already doing the right thing
 - - Trade-off - people believe that health and sustainability come at the expense of cost and taste



III. MAKING FOOD SYSTEMS SUSTAINABLE

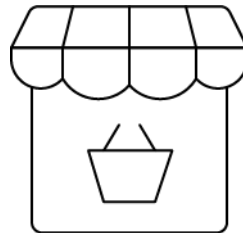
Adopting a sustainable diet: importance of affordability, availability and clear information

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



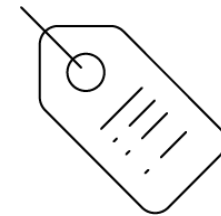
Healthy, sustainable choices are affordable

49%



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

45%

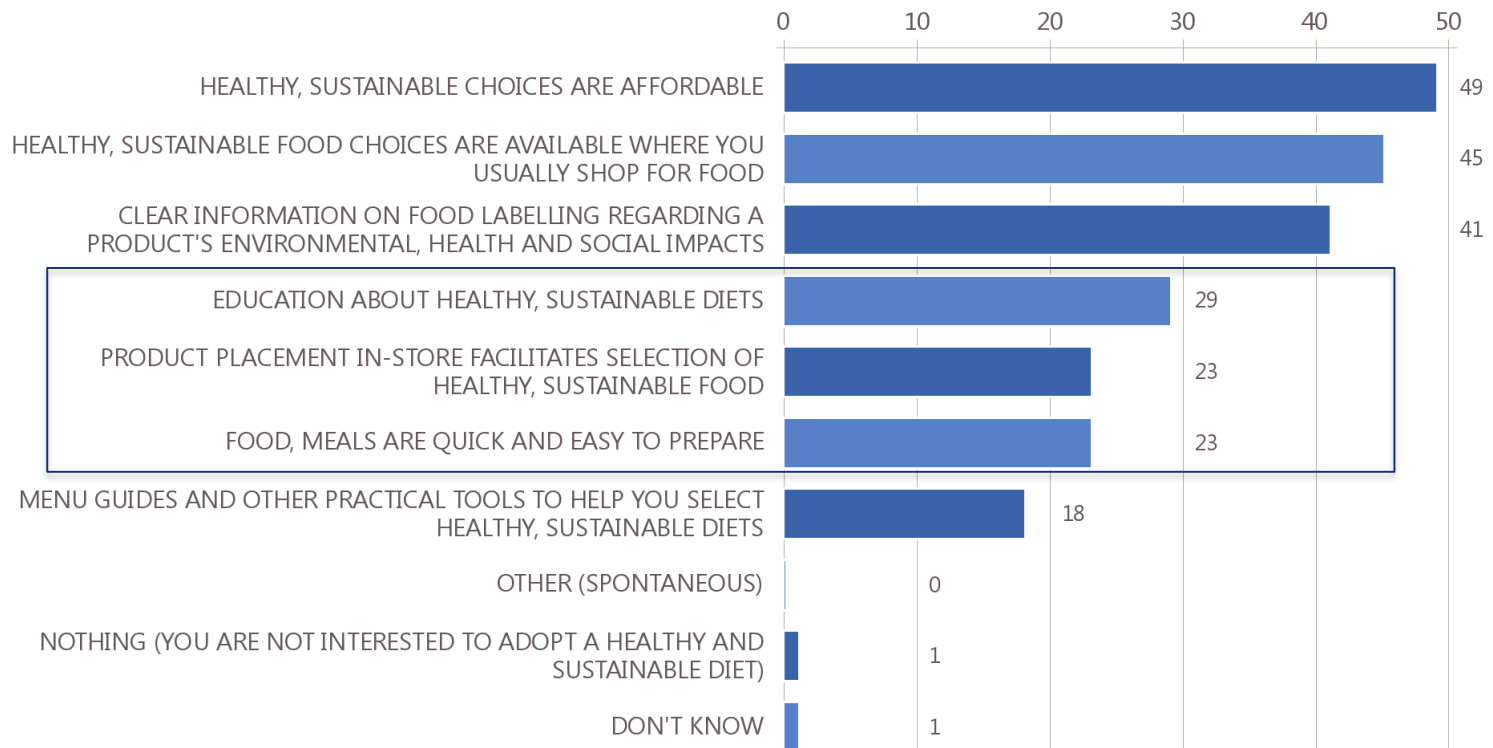


Clear information on food labelling regarding a product's environmental, health and social impacts

41%

Three other options are mentioned by at least one fifth of the Europeans: education about healthy diets, food being easy to prepare, and the product placement of healthy food in store

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



Base: all respondents (n.= 27,237)

Main obstacles to sustainable food choices

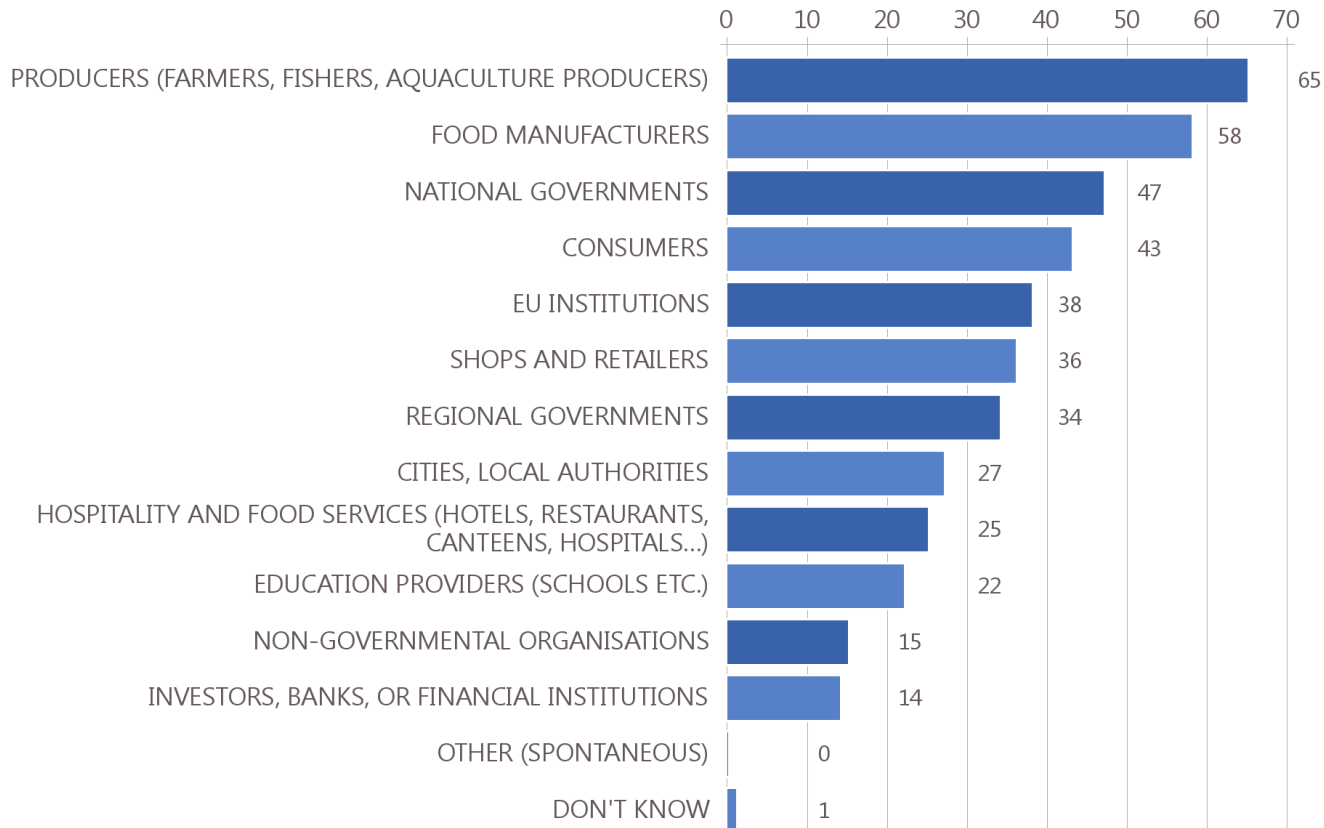
= Availability, cost and information

- *Availability is linked to supply chains and product development but also to information*
- *Information is a major barrier: sustainable and healthy products may be available, but if consumers don't know, there will be no sustainable and healthy choices*
 - *Information must be available and reliable*
 - *Information should also be easily understood and easy to use.*



Who plays a crucial role?

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



Base: all respondents (n.= 27,237)

SOME TAKEAWAYS

- For Europeans, food is “sustainable” when it is **nutritious and healthy**, it has been produced with a little or **no use of pesticides**, and when it is **affordable** for all.
- European consider that the most important aspect of a sustainable diet is that **what they eat is healthy for them**. Likewise, a “healthy and sustainable diet” involves eating a variety of different foods, having a balanced diet, and eating more fruits and vegetables.
- Europeans prioritise **taste, food safety** and **cost** over sustainability concerns when purchasing food.
- **Producers** (farmers, fisheries etc.) **and food manufacturers are seen as key actors in making our food systems sustainable**, above public authorities. Less than one in two recognise their own role as consumers.
- A request for clearer information about food and its importance for health is also evident in citizens’ responses to concerns about food fraud: they mostly fear being **misled about the true qualities of food** and **the risks that it represents for their health**.